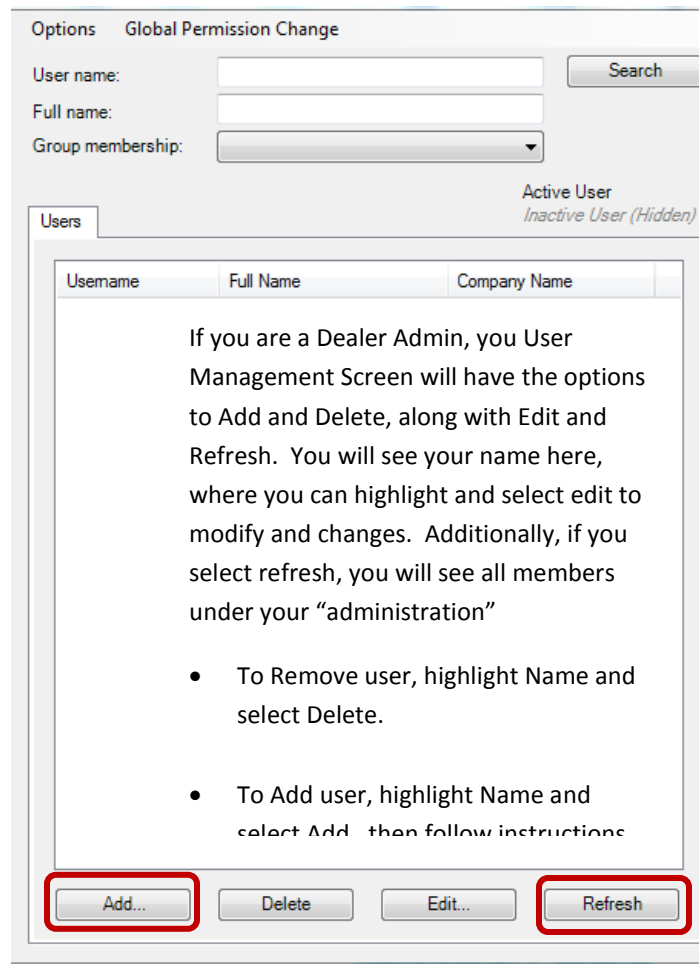
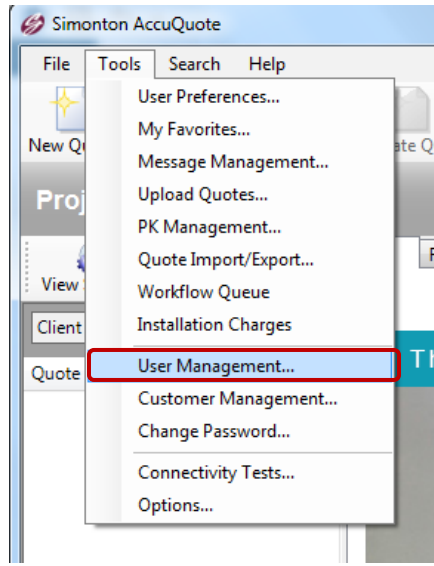


## Dealer Admin Setup



## Adding a New User

### 1. General Tab

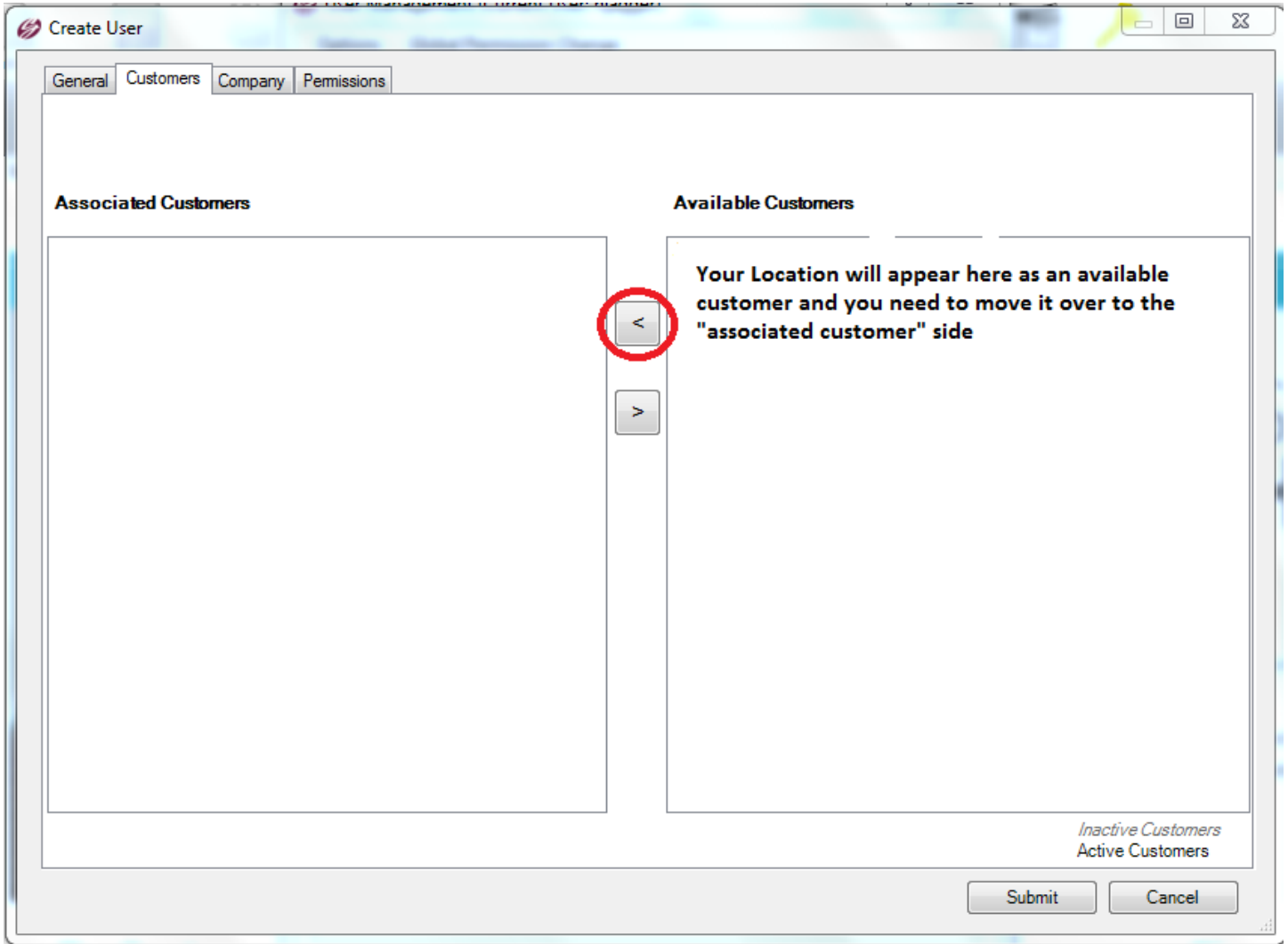
- a. Create user name – typically first initial of their first name and full last name.
  - i. Ex: Nick Dunn = ndunn
- b. Create personalized password and confirm
  - i. You can push the expiration date of your password out to your desired date
- c. Add User First Name and Last Name
- d. Add Email – This will be used for the “Forgot Password” option on login screen

The screenshot shows a 'Create User' dialog box with the following fields and options:

- General Tab:** Customers, Company, Permissions
- Username:** Create New User Name
- Password:** Create Personal Password
- Confirm Password:** Confirm Password
- Password expires:** Thursday, March 08, 2018
- First Name:** Add First & Last Name
- Last Name:** [Text Field]
- Phone:** [Text Field]
- Mobile Phone:** [Text Field]
- Fax:** [Text Field]
- E-mail:** Must add Email
- Contractor/Job:** [Dropdown]
- Markup Entry Type:** [Dropdown]
- Address 1:** [Text Field]
- Address 2:** [Text Field]
- City:** [Text Field]
- State:** [Text Field]
- Zip:** [Text Field]
- Min Markup Pct:** [Text Field]
- Max Markup Pct:** [Text Field]
- Min Markup Amt:** [Text Field]
- Max Markup Amt:** [Text Field]
- Default Sales Person:** [Dropdown]
- Integration ID:** [Text Field]
- Custom Field 1:** [Text Field]
- Custom Field 2:** [Text Field]
- Custom Field 3:** [Text Field]
- Custom Field 4:** [Text Field]
- Custom Field 5:** [Text Field]
- Default Customer:** [Dropdown] (highlighted with a red box and the text: **You will come back to this option later**)

Buttons: Submit, Cancel

2. Customers Tab - Move company name from "Available Customers" over to "Associated Customers"



### 3. Company Tab – Add Branch Information

- a. Name = Branch Location

The screenshot shows the 'Create User' dialog box with the 'Company' tab selected. The 'Permissions' sub-tab is highlighted with a red box. The form contains the following fields:

- Name: [ ]
- Address1: [ ]
- Address2: [ ]
- Address3: [ ]
- City: [ ]
- State: [ ]
- Zip: [ ]
- Phone: [ ]
- Fax: [ ]
- E-mail: [ ]

### 4. Permissions Tab

The screenshot shows the 'Create User' dialog box with the 'Permissions' tab selected. The 'Permissions' sub-tab is highlighted with a red box. The form contains the following elements:

- Associated Permissions:** A list of permissions including AddorEditQuotePrint Headers, AddSideBySide, AllowArchive Search, AllowPrintingOfPendingOrders, AllowQuoteDiscounts, CalculateDPRatings, CanChangeProjectGridDisplay, CanCreate Templates, CanEditCompanyIntegrationId1, CanEditCustomerPrice, CanEdit Templates, and CanInputCustomPrepay.
- Available Permissions:** A list of permissions including FullSelfManagement and SetupUser.
- Group:** A dropdown menu set to 'Dealer'.
- Brand associations:** A list of brands including Allow all brands and Simonton.
- Copy Other User's Security...** button.

(\*) denotes that the permission cannot be given back to user once it is removed.

- **Dealer** = Standard Order Entry options but CANNOT Add/Delete users.
- **Dealer Admin** = Same as dealer but CAN Add/Delete users
- **Dealer No Cost** = Allowed to Quote/Order but CANNOT see branch cost (rarely used)
- **Dealer No Order** = Ability to quote, see cost BUT CANNOT Order

Submit Cancel

Create User

General Customers Company Permissions

Username:

Password:

Confirm Password:

Password expires:  Thursday , March 08, 2018 ▼

First Name:

Last Name:

Phone:

Mobile Phone:

Fax:

E-mail:

Contractor/Job:

Markup Entry Type:

Address1:

Address2:

City:

State:

Zip:

Min Markup Pct:

Max Markup Pct:

Min Markup Amt:

Max Markup Amt:

Default Sales Person:

Integration ID:

Custom Field 1:

Custom Field 2:

Custom Field 3:

Custom Field 4:

Custom Field 5:

Default Customer:

Submit Cancel

Select your location as the Default Customer ... Then CLICK SUBMIT