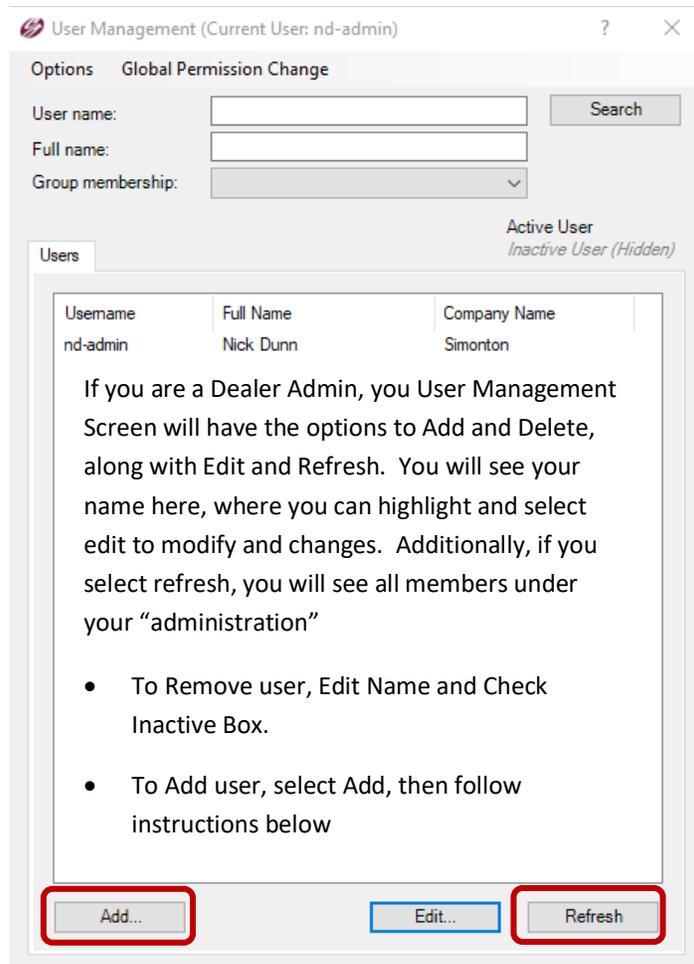
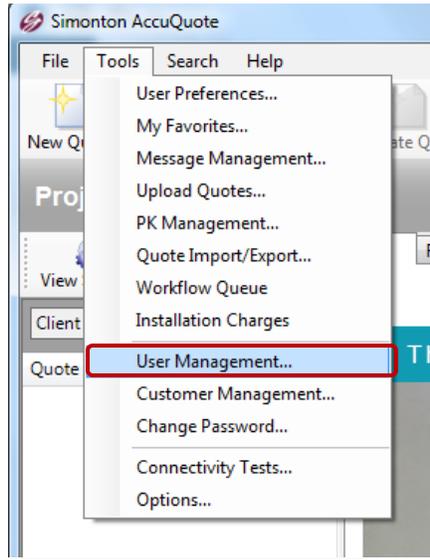


Dealer Admin Setup



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

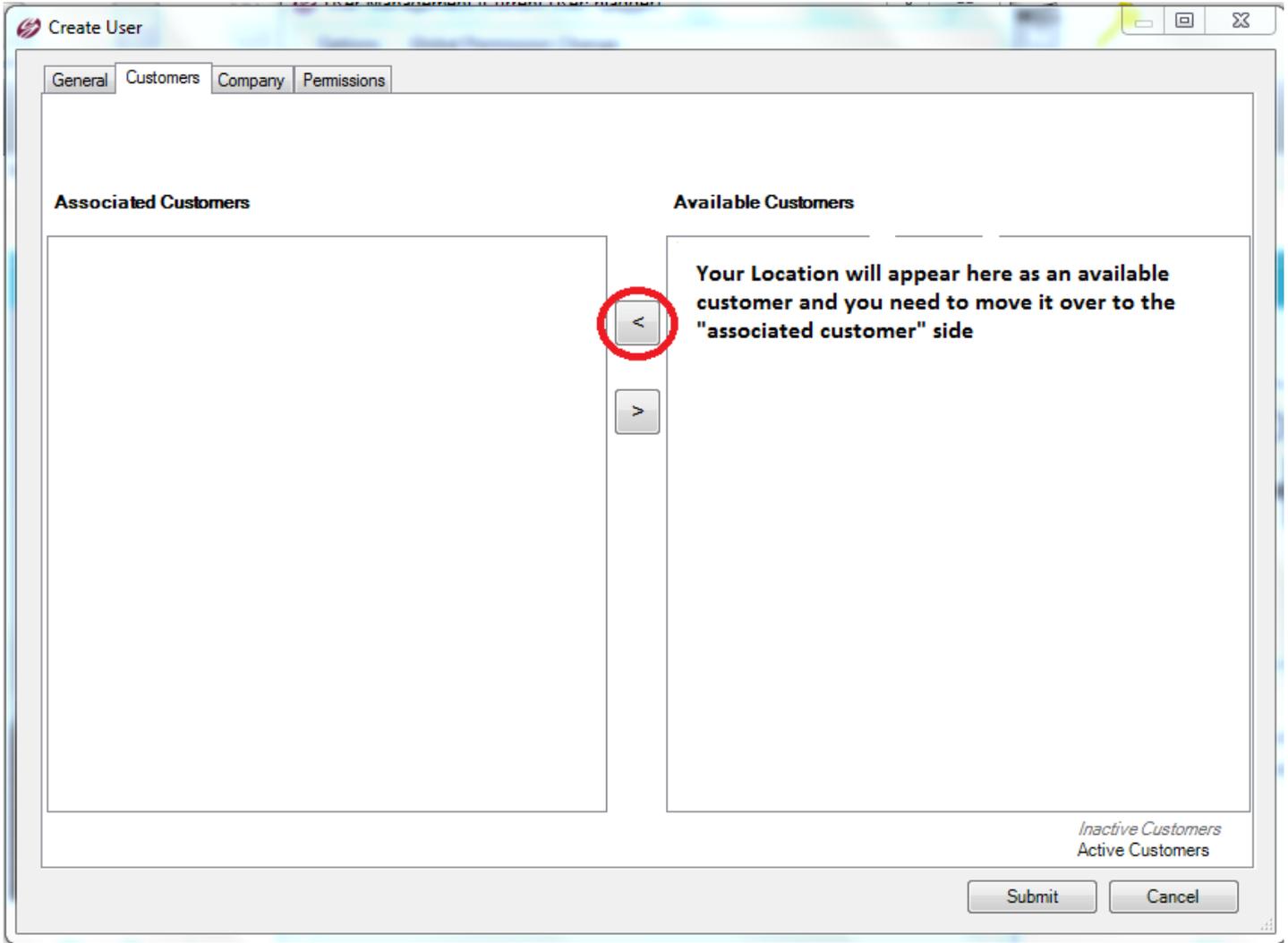
The screenshot shows a 'Create User' dialog box with the following fields and options:

- 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:** [Empty text box]
- Phone:** [Empty text box]
- Mobile Phone:** [Empty text box]
- Fax:** [Empty text box]
- E-mail:** Must add Email
- Contractor/Job:** [Empty dropdown menu]
- Markup Entry Type:** [Empty dropdown menu]
- Address1:** [Empty text box]
- Address2:** [Empty text box]
- City:** [Empty text box]
- State:** [Empty text box]
- Zip:** [Empty text box]
- Min Markup Pct:** [Empty text box]
- Max Markup Pct:** [Empty text box]
- Min Markup Amt:** [Empty text box]
- Max Markup Amt:** [Empty text box]
- Default Sales Person:** [Empty dropdown menu]
- Integration ID:** [Empty text box]
- Custom Field 1:** [Empty text box]
- Custom Field 2:** [Empty text box]
- Custom Field 3:** [Empty text box]
- Custom Field 4:** [Empty text box]
- Custom Field 5:** [Empty text box]
- Default Customer:** [Empty dropdown menu]

A red callout box highlights the 'Default Customer' field with 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...:** A button to copy security from another user.

(*) 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

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:

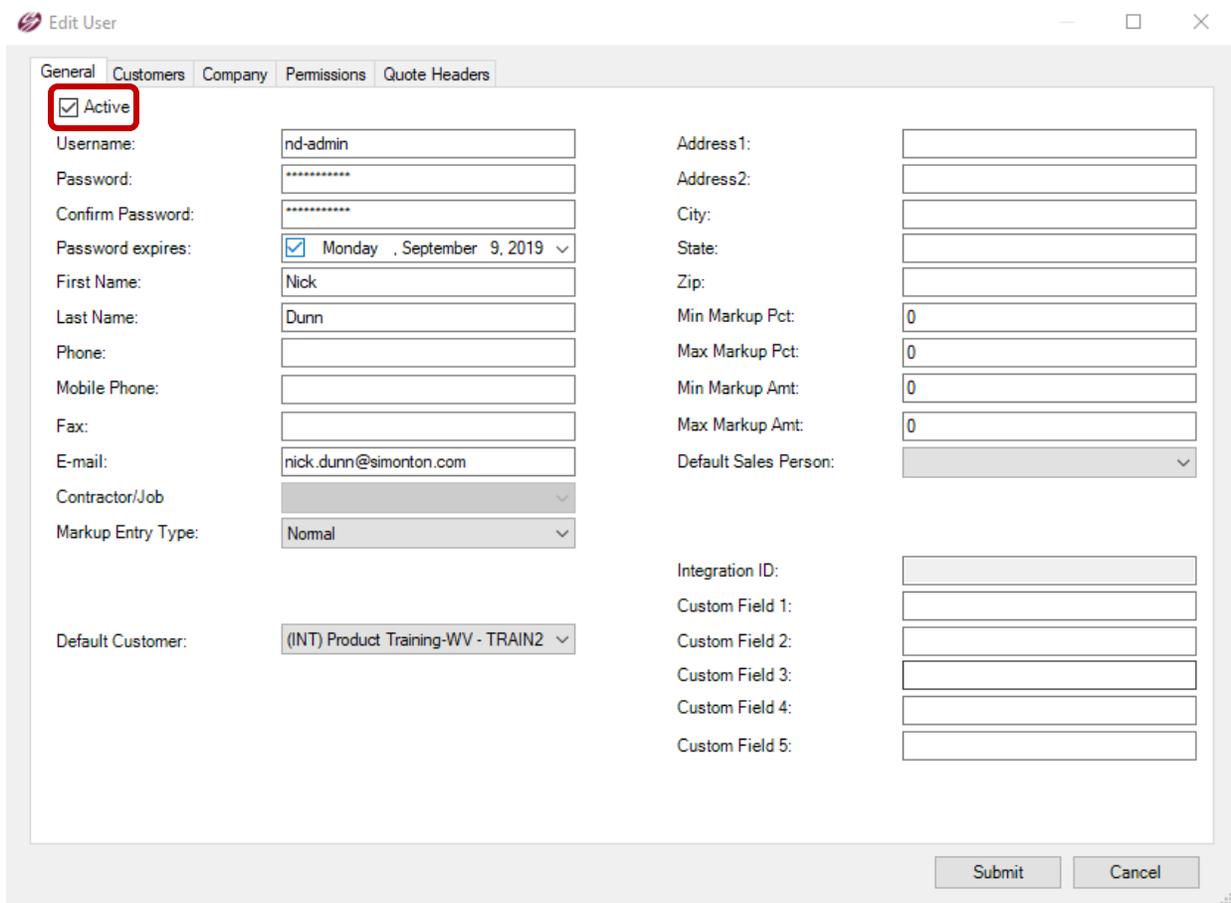
Default Customer:

Submit Cancel

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

Setting a User Inactive

- Go to Tools/User Management/Check Refresh/Highlight the Name you want to remove/Select Edit/Uncheck the Active Box.



The screenshot shows a window titled "Edit User" with several tabs: "General", "Customers", "Company", "Permissions", and "Quote Headers". The "General" tab is selected. At the top left of the form area, there is a checkbox labeled "Active" which is checked and highlighted with a red square. Below this, the form contains various fields for user information:

Username:	nd-admin	Address 1:	
Password:	*****	Address 2:	
Confirm Password:	*****	City:	
Password expires:	<input checked="" type="checkbox"/> Monday, September 9, 2019	State:	
First Name:	Nick	Zip:	
Last Name:	Dunn	Min Markup Pct:	0
Phone:		Max Markup Pct:	0
Mobile Phone:		Min Markup Amt:	0
Fax:		Max Markup Amt:	0
E-mail:	nick.dunn@simonton.com	Default Sales Person:	
Contractor/Job:			
Markup Entry Type:	Normal		
		Integration ID:	
		Custom Field 1:	
		Custom Field 2:	
		Custom Field 3:	
		Custom Field 4:	
		Custom Field 5:	
Default Customer:	(INT) Product Training-WV - TRAIN2		

At the bottom right of the window, there are two buttons: "Submit" and "Cancel".