

How to add a Contact

This lesson takes you through adding a contact (login) and describes the different types.

From the home page, go to Our Profile > Contacts > New

The screenshot shows the 'Our Profile' page for 'AnotherTestDealer'. A red arrow points from the 'Our Profile' link in the left navigation menu (marked with a '1') to the 'Contacts' tab in the bottom right of the main content area (marked with a '2'). From the 'Contacts' tab, another red arrow points to the 'New' button (marked with a '3').

Company Information

Name	AnotherTestDealer
Address	400 E 8th Hamilton, NJ 08690

Account Information

Current A/R	\$115.64	Credit Limit	\$100,000,000.00
Over 25 Days	\$0.00	Unshipped Orders	\$0.00
Over 30 Days	\$0.00	Total A/R	\$115.64
Total A/R	\$115.64	Total Credit Line Used	\$115.64
Interest on Past Due	\$0.00	Open to Buy	\$99,999,884.37

Company Information

Name (Admin)	Permissions
admin	Admin
staff	Staff
air	A/R

Buttons: Ship Methods, Contacts, New, Delete

Admin = Full System Rights (Can see Financials & manage Contacts)

A/R = Financial Rights (Can see Financials but can't manage Contacts)

Staff = Unable to see Financials and can't manage Contacts

Do **NOT** "Hide" an account as you are unable to unhide it yourself - if you do hide by mistake contact DMIIT@DMIORG.Com
(Future plans to only apply the hide to A/R and Staff, must not hide a hidden account from the Master)

Fill in the information

(1) Permissions:

Admin:

Can view and makes changes to all items

A/R:

Contacts tab is hidden. Cannot create nor make changes to other contacts.

Cannot add Ship Methods

Under Account - **Can** see Payments/Credits, Orders, Left to Allocate

Staff:

Contacts tab is hidden. Cannot create nor make changes to other contacts.

Cannot add Ship Methods

Under Account - **Cannot** see Payments/Credits, Orders, Left to Allocate

****DMI can further modify contacts including:**

Add/Delete Master contacts

Hide/Unhide contact from web

Allow contact to receive alerts

Allow contact to receive invoice