

DMI DRS DEALER WEBSITE

A How-To Guide

2016

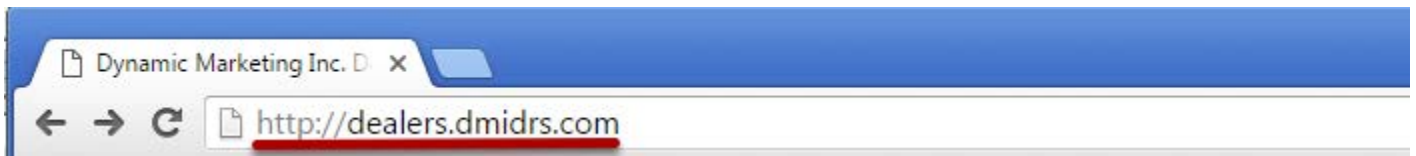


<https://dealer.dmidrs.com>

How To Login

This lesson takes you through the DRS dealer website login process.

Open a web browser and go here



Enter credentials

A screenshot of the 'Dealer Login' page. The page features the 'Dynamic Retailers System™' logo and the 'DMI' logo. Below the logos, there are two input fields: 'Email Address' and 'Password'. Two large red arrows point to these fields. Below the input fields is a teal 'Sign me in' button and a link for 'Forgot Password?'.

and you're in...

A screenshot of the 'AnotherTestDealer Our Profile' page. The page is divided into two main sections: 'Company Information' and 'Account Information'. The 'Company Information' section shows the name 'AnotherTestDealer' and the address '400 Cabot, Hamilton, NJ 08690'. The 'Account Information' section shows a table with financial data. A sidebar on the left contains navigation links: 'Our Profile', 'Orders', 'Shipments', 'KRA', 'Account', 'Vendor Credit Requests', and 'Reports'. The top right corner shows the user 'admin' and a 'Home' link. The bottom of the page has a 'Company Information' section with an 'ADD SHIP METHOD' button and a 'Method' dropdown menu.

Basic Navigation

This document shows explains some of the home page choices and navigation options

Navigation

The screenshot displays the Dynamic Retailers System (DMI) interface for a user named 'AnotherTestDealer'. The interface includes a left-hand navigation menu, a main content area with 'Company Information' and 'Account Information' sections, and a top header with user information and system status. Red arrows and text boxes provide instructions on how to use various features.

Navigation Menu (Left):

- Create and view orders here
- View all of your shipments and statuses on each here
- Submit KRAs (returns) and status here
- View your invoices, payments/credits, orders, and left to allocate here
- Submit Credit Requests here. Used to performed by Lianna, now performed by Elizabeth. You can now submit supporting documents online

Main Content Area:

- Company Information:** Name: AnotherTestDealer, Address: 400 Cabot Hamilton, NJ 08690.
- Account Information:** Table with financial data.
- Ship Methods:** Table with shipping methods and default status.
- Contacts:** Section for managing contacts.

Annotations:

- Green line indicates data processing
- Click to refresh info without having to refresh browser
- Who you are logged in as
- Moving circle = Activity Connected
- Expand, minimize or close window. Navigate to a different page then back in to refresh.
- These windows are movable. You can click on the title part or expand/contract browser window.
- Modify who has access to your information on this website here
- Click to minimize Navigation window

Category	Value	Category	Value
Current A/R	\$115.64	Credit Limit	\$100,000.00
Over 25 Days	\$0.00	Unshipped Orders	\$389.22
Over 30 Days	\$0.00	Total A/R	\$115.64
Total A/R	\$115.64	Total Credit Line Used	\$50.85
Interest on Past Due	\$0.00	Open to Buy	\$99,999,495.11

Method	Default?	Action
zzMarkTestTrucking2	Yes	Delete Make Default
zz MarkTestTrucking		Delete Make Default
AJ Store 1		Delete Make Default
AJ Store 2		Delete Make Default

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'). Another red arrow points from the 'Contacts' tab to the 'New' button (marked with a '3').

Company Information

Name	AnotherTestDealer
Address	400 E 8th St 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

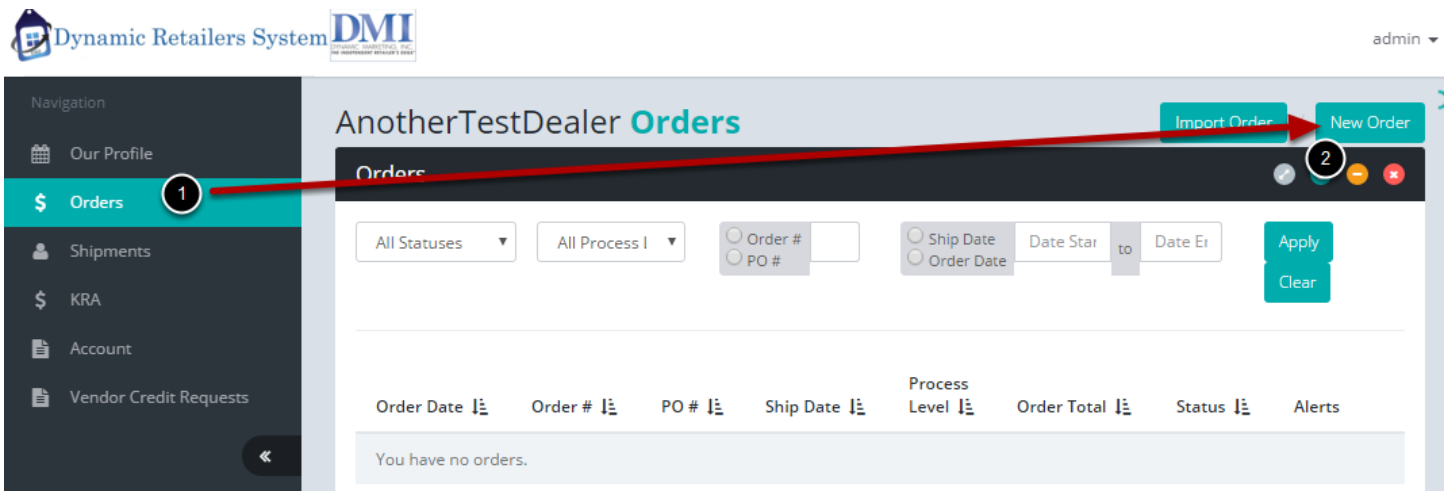
Allow contact to receive alerts

Allow contact to receive invoice

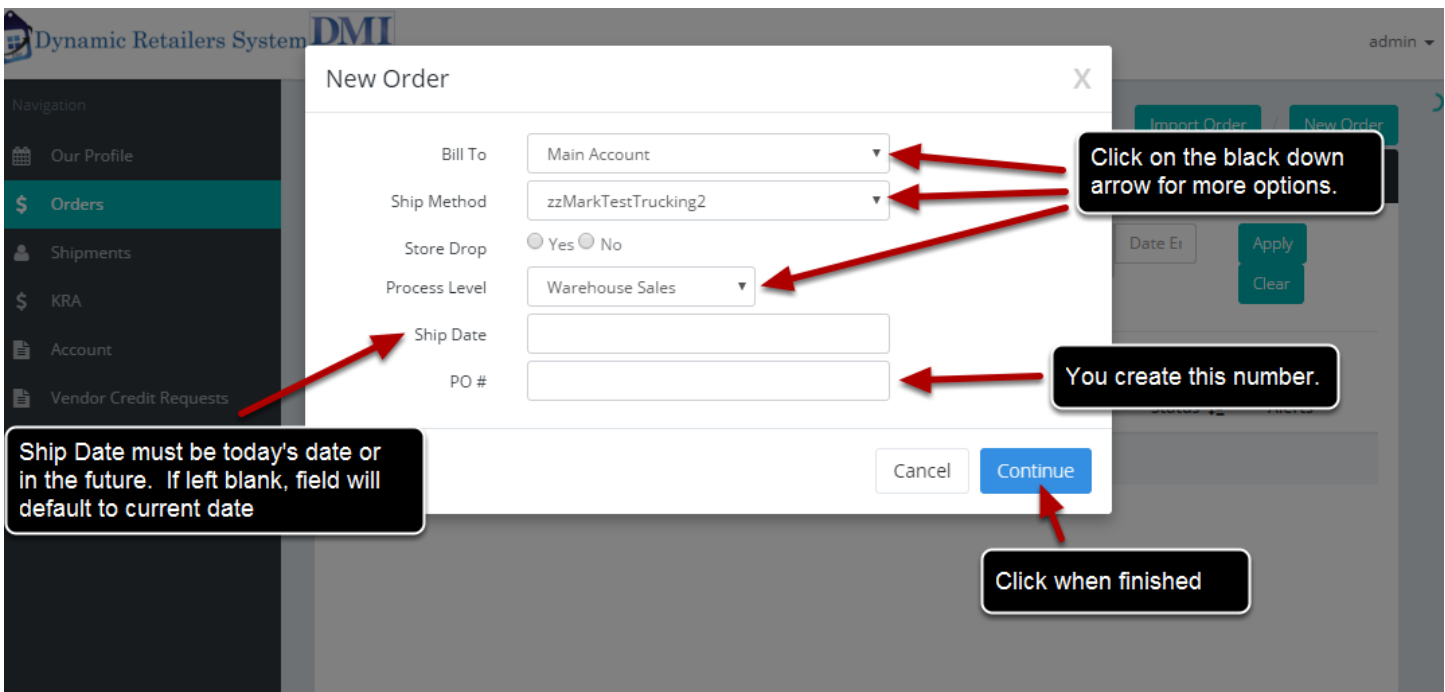
How to create an Order

This lesson takes you through creating an order

From the home page **CLICK Orders > New Order**



At the 'New Order' pop-out window, fill in the information



Arrive at the Order Detail page and verify/edit any information then CLICK 'Add Item'

AnotherTestDealer Order Detail

Save Changes Back

Order Information

Order # 74745
 Order Date 04/14/2016
 Bill To Main Account
 Ship Method zzMarkTestTrucking2
 Ship Complete ☐ Yes ☒ No
 Store Drop ☐ Yes ☒ No
 Process Level Warehouse Sales
 Ship Date 04/14/2016
 PO # 987654321

Shipping Information

Ship To Ship to Hamilton
 Ship Name Ship to Hamilton
 Address 400 Cabot
 City Hamilton
 State NJ
 Zip 08690
 Phone
 COD Info

Your selected default method is auto-entered. You can edit this.

Order Items

Click to start adding items Add Item

Model #	Qty	Allocated	Pulled	Shipped	Back Ordered	Your Cost	Penalties
There are no items for this order.							

At the 'Order Item' pop-out windows, fill in the information then click 'Add'

Order Item

Model un40j
 Qty 1

Cancel Add

Hint: You need only type in the first several digits of a model number. The next pop-up window will populated models that match those digits.

Arrive at the 'Select Model Number' window

Click on the model you want - READ IMPORTANT NOTE BELOW!!

IMPORTANT: Click only ONE time on the model. There could be a ~15 to 30 second delay after you click the model before it goes through. IF YOU CLICK AGAIN, MULTIPLE ITEMS WILL BE ADDED.

Model Number

Product Name

UN40J5200AFXZA

ELECT

UN40J5500AFXZA

ELECT

UN40J6200AFXZA

ELECT

UN40JU6400FXZA

ELECT

UN40JU6500FXZA

ELECT

UN40JU6700FXZA

ELECT

UN40JU7100FXZA

ELECT

UN40JU7500FXZA

ELECT

Cancel

New line item has now been added

Process Level: warehouse sales

Ship Date: 04/14/2016

PO #: 987654321

Zip: 08690

Phone:

COD Info:

Modify as needed

Add Item

Order Items

Model #	Qty	Allocated	Pulled	Shipped	Back Ordered	Your Cost	Penalties	
UN40J5200AFXZA	1	1	0	0	0	\$389.22	\$0.00	<div>Edit</div> <div>Delete</div>

How to add a Ship Method

This document briefly explains adding ship methods

Go to Our Profile > Ship Methods tab

Our Profile

- Orders
- Shipments
- KRA
- Account
- Vendor Credit Requests

Company Information

Name: AnotherTestDealer
Address: 400 Cabot Hamilton, NJ 08690

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

ADD SHIP METHOD

Shipping Method 1
Shipping Method 2
DD SHMETH 3
Albert
AJ Store (AJ Madison)
AJ Store 1
AJ Store 2

zzMarkTestTrucking2 **Delete** **Make Default**
zz MarkTestTrucking **Delete** **Make Default**

CLICK on the method you want

CLICK the Drop Down to see the different methods

Verify selection

Account

- Vendor Credit Requests

Company Information

ADD SHIP METHOD

Method Default?

zzMarkTestTrucking2		Delete Make Default
zz MarkTestTrucking		Delete Make Default
AJ Store 1		Delete Make Default
AJ Store 2		Delete Make Default
Shipping Method 2	Yes	Delete Make Default

Click to modify line item

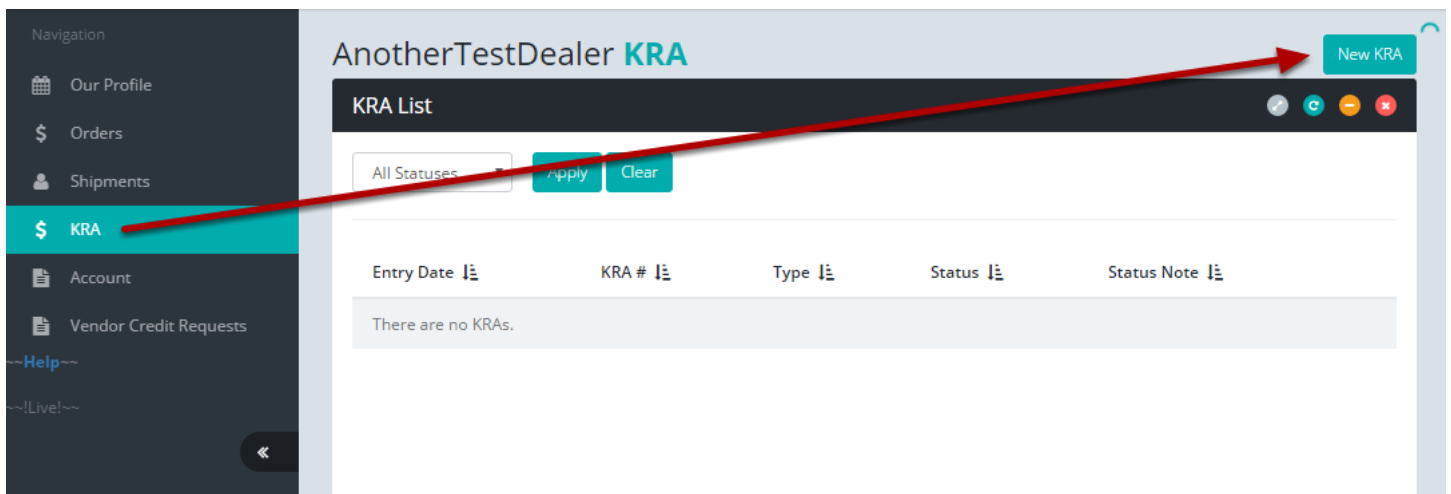
Selection now shows up. Multiple ship methods can be added, but only one default method allowed.

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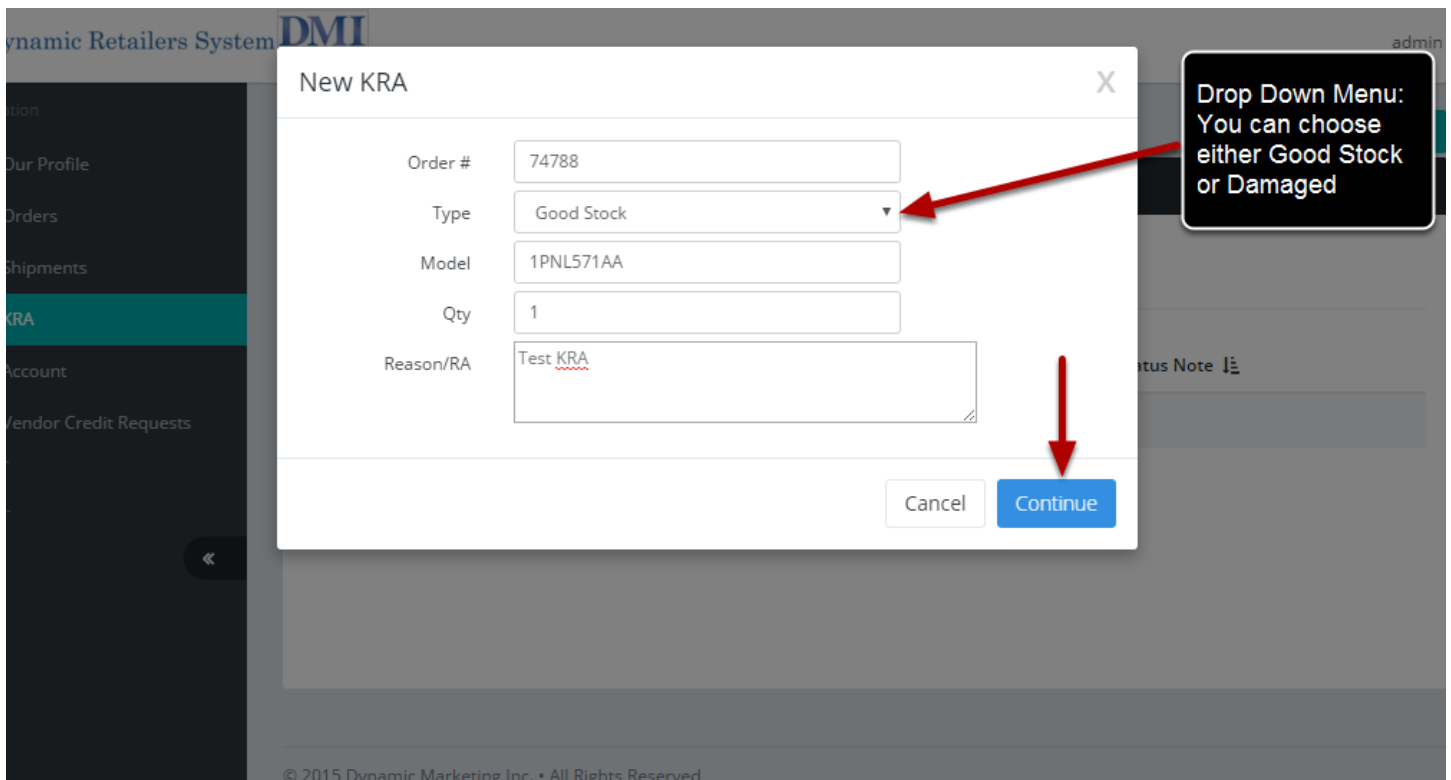
How to create a KRA

This lesson takes you through creating a KRA (Return)

Go to KRA > New KRA



At the New KRA pop up, enter information, then CLICK Continue



At the next KRA Detail Screen, verify the information, then CLICK Add Item

system **DMI** DIAGNOSTIC MANAGEMENT, INC. THE INDEPENDENT RETAILER'S CHOICE admin ▾

AnotherTestDealer KRA Detail

List

KRA Information

KRA #	129
Order #	74788
Type	Good Stock
Date Entered	04/19/2016
Status	New
Status Note	

Add items from this order

Add Item

Model #	Serial #	Disposition
There are no KRA Items.		

At the KRA Item pop-up, enter information, then CLICK Save.

system **DMI** DIAGNOSTIC MANAGEMENT, INC. THE INDEPENDENT RETAILER'S CHOICE

KRA Item

Serial #

- OR -

Model #

Cancel Save

Status New

At the KRA Detail page, your KRA line item now shows. Repeat adding items as needed.

AnotherTestDealer KRA Detail List

KRA Information

KRA #	129
Order #	74788
Type	Good Stock
Date Entered	04/19/2016
Status	New
Status Note	

KRA Items Add Item

Model #	Serial #	Disposition
1PNL571AA		Waiting for Return

Delete

Returning to the KRA page, a list of your KRAs appear here

AnotherTestDealer KRA New KRA

KRA List

All Statuses Apply Clear

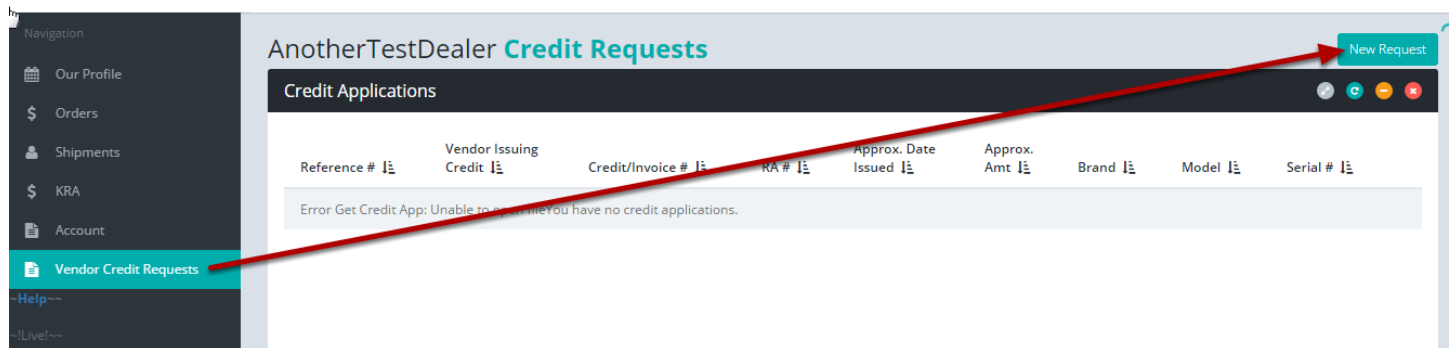
Entry Date	KRA #	Type	Status	Status Note
04/19/2016	129	Good Stock	New	

Clicking on the KRA will return you to the KRA Detail screen where you can view disposition status and/or delete the KRA.

How to create a credit request

This lesson takes you through creating a credit request.

Go to Vendor Credit Requests > New Request



At New Credit Request pop up, enter information, then CLICK Continue

New Credit Request

CREDIT INFORMATION

Vendor Issuing Credit: HP (Vendor)

Credit#(if available): 12345

Invoice# (if available): 54321

RA # (Include Return Auth Form): 98765

Approximate Date Issued: 04/01/16

Approximate Amount: 1000

PRODUCT INFORMATION

Brand: HP (Brand)

Model: 1PNL571AA

Serial Number: 5847660210-0043

**NOTE: *G #'s & T #'s DO NOT HELP US TO LOCATE CREDITS.
*ACTUAL CREDIT/INVOICE# IS THE BEST INFORMATION YOU CAN PROVIDE.
When following up on status of request please use Credit Ref #**

Cancel Continue

*****To help speed up and verify your request, fill out more fields and be more specific with your information**

At New Credit Request pop up, upload any supporting documents, then **CLICK Save**

New Credit Request

Upload Proof of "Scrap Returns"

You may upload PDF, Word, and JPEG files (.pdf, .doc, .docx, .jpg and .jpeg file extensions)

Select Document to Upload

Choose File No file chosen

Save Skip

***Uploading a supporting document here will also help speed up and verify your request

*If a document is unavailable, CLICK Skip

Credit Request is now submitted

AnotherTestDealer Credit Requests

Click on a line item to view Credit Request Details

New Request

Reference #	Vendor Issuing Credit	Credit/Invoice #	RA #	Approx. Date Issued	Approx. Amt.	Brand	Model	Serial #
1350 Status:	HP (Vendor)	Cr: 456789 In: 987654	12345	03/01/2016	\$500	HP (Brand)	1PNL571AA	465113BXN-0024-Q
1349 Status:			1765	04/01/2016	\$1000	HP (Brand)	1PNL571AA	5847660210-0043

This is the Credit Ref #. Use this # when following up on status.

FAQs

[GENERAL](#) | [OUR PROFILE](#) | [ORDERS](#) | [SHIPMENTS](#) | [KRA](#) | [ACCOUNT](#) | [VENDOR CREDIT REQUESTS](#)

I need help

- Customer Service: custs@dmiorg.com
- IT issues: help@dmiorg.com 347-943-4356

I just came back to my desk and my session is frozen

- Click into the session and wait ~15 to 30 seconds

I closed a session window. How do I get it back?

- Click on another Navigation menu tab, then click back in to your screen

How do I sort my items

- **CLICK** the title of the column. Data will sort from smallest to largest.

GENERAL

How to import account information (A/R, current open orders, credits, and so on... from old Lawson system to new DMI system?

- You don't have to do this! DMI will be moving all this data over to the new system for you!

How to change password for master account?

- You must contact DMI-IT for the master password to be altered in anyway including password

OUR PROFILE

Where is the contact I just added?

- If you clicked **Save** and checked the hide button, the contact is now hidden. Contact DMI to unhide.

How do I add a ship method?

- Contact DMI customer service:
custs@dmiorg.com

ORDERS

How many line items can I enter?

- Currently we don't have a limit

I've got a bunch of orders. Is there a way to bulk upload?

- Yes! CLICK on Import Order and you'll find template and instructions.

On my order, what does the yellow CH box mean?

- Credit Hold

When can I use store Drop?

- only if you use the house trucker

How to release back orders? Or they will be automatically released by DMI?

- DMI will Auto Release

SHIPMENTS

I'd like to
see details
on my
shipment

- Go to Shipments > CLICK on the line item > the Shipment Detail page will load

ACCOUNT

I'd like to see
Payments/Credits,
Orders, and Left to
Allocate

- You need to be either an admin or AR to see this. Contact one of your admins to enable.

VENDOR CREDIT REQUESTS

On the Credit Request Details window, I typed in my information but it doesn't save.

- This window for reference only. Because of the web coding, it allows false editing.

If my sales rep give me a credit allowance, how long should I wait before I request a credit

- It may take a few days before DMI get's the credit from a vendor so wait 7 days before submitting a request.