

Dealer Extranet 3 Account Information Guide



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Account information

To access your Account Information, click on **Account Info** at the top left of the screen.

Logged in as John Smith, Administration **Account Info** | Log out



- WINDOWS
- FLASHING
- BLINDS
- SUN TUNNEL
- FLAT ROOF
- SMOKE VENTS
- INSTALLATION
- LOFT LADDERS
- More...
- Menu

Your Account

- > Orders
- > Invoices
- > Account Info
- > Quotes
- > Client Quotes

Tools

- > Quick Order
- > Upload Order
- > Client Quote Tool
- > Favorites

Contact & Support

Call us:
(0) 1592 77 22 11

Write us:
etrading@velux.co.uk

Account information

Search and view your Orders, Invoices, Quotes from VELUX and Quotes for Clients

View your favourites

Your Account

Orders Invoices Quotes from VELUX Quotes for clients

Account Info Favourites

Your Information:

Name:
Phone:
Company Name:
E-mail:
Customer number

[Change password](#)

Change Branch Address

Search for address:
e.g street, city...

[I want to place orders for another branch](#)

Upload Logo

Logo is used in Quotes for clients

[Choose image file...](#)



Upload your company logo for Client Quotes

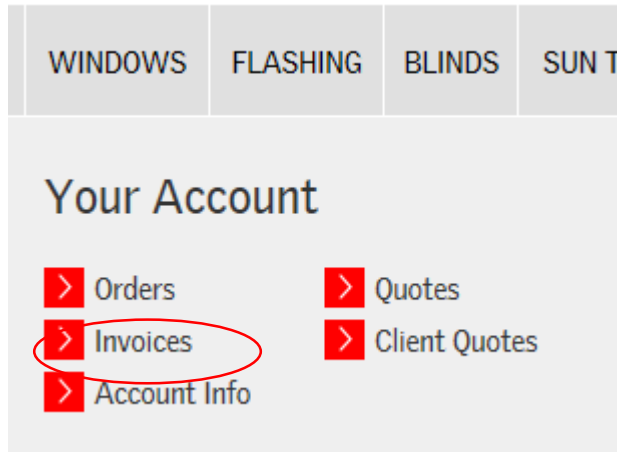
View the details we have on file for you

Click here to change your password

Request Super Dealer access to place orders for other branches

Search/View Invoices

If you need to search for an invoice, click on **Invoices** in the Your Account section which can be found either on the **Home Page** or in the **Account Info** screen.



Your Account



You will not be able to view invoices which are sent to a third party such as a buying group (NMBS etc.)

Search/View Invoices


You can search by invoice no. or select a date range to view.


Once you locate the invoice you want, click on the Invoice Number to view it.

Orders	Invoices	Quotes from VELUX	Quotes for clients
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Find invoice

Search for: **Search**

Start date: 

End date: 

Super Dealers

Super Dealers have access to place orders, prepare quotes, track deliveries and/or view invoices for a number of branches. To request Super Dealer access go into [Account Info](#) and click on **I want to place orders for another branch** and complete the details of the account you need access to.

Your-Account

[Orders](#)[Invoices](#)[Quotes from VELUX](#)[Quotes for clients](#)

Your Information:

Name:

Phone:

Company Name:

E-mail:

Customer number

[Change password](#)

Change Branch Address

Search for address:

[I want to place orders for another branch](#)

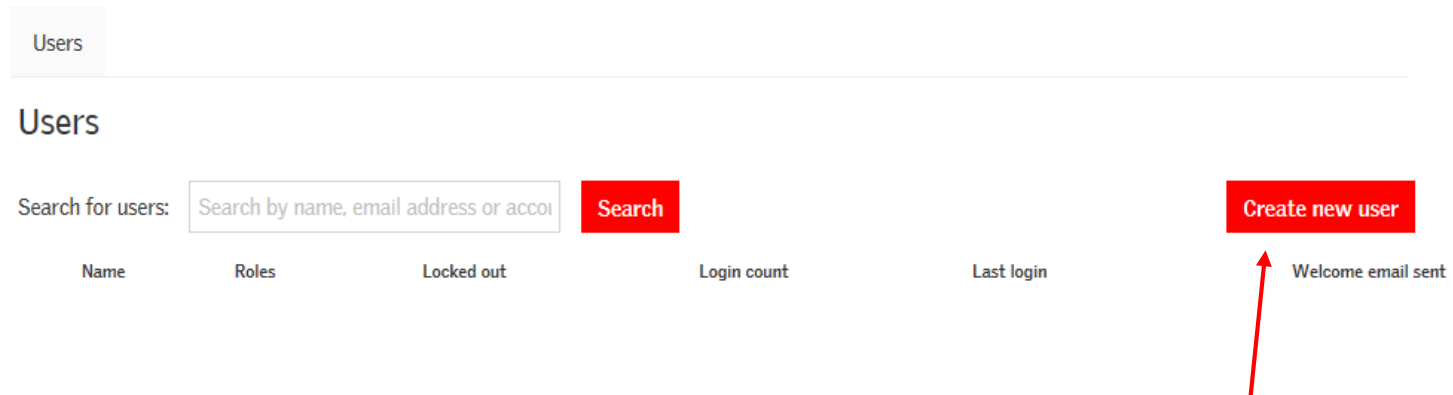
Please note: Super Dealers cannot set up Sub Users. Please contact VELUX if you need to add Sub Users on your account.

Sub Users - Creating

If other members of staff also need to use DE3, then anyone with a Dealer account can set up Sub Users.

Sub Users can have as much or as little access as you like. For example you may want the goods-in staff to be able to view and track orders but not be able to place any orders. Whereas, someone from the accounts department could have access to view invoices. You should create your own sub user(s), VELUX do not have access to do this for you.

When you log into your account, click on the [Administration](#) button at the top of the page



The screenshot shows the 'Users' management interface. At the top left, there is a 'Users' tab. Below it, the heading 'Users' is displayed. A search bar is present with the placeholder text 'Search for users: Search by name, email address or accoi' and a red 'Search' button. To the right of the search bar is a red 'Create new user' button, which is highlighted by a red arrow. Below the search bar, a table header is visible with columns: Username, Name, Roles, Locked out, Login count, Last login, and Welcome email sent.

Here you will see a list of any existing Sub users on the account. Click **Create new user**

Sub Users - Creating

Users

Create new user

Name*

Phone*

Email*

Company* VELUX

Blocked

External Roles

Can create quote

Can place order

Can track order

Can view customer data

Can view order

Show invoices

Show net price and discount

Create new user
Create new user and notify
Cancel

Please fill in all the details for the user.

If you would like to remove any of the roles from a user, just click on the box to remove the tick

Once you are happy, click on **Create new user and notify**. They will then receive an email from us to log on and create a password.

Please note the email address that you enter will be the username. Only one email address can be used per customer account.

Sub Users - Editing

If you need to edit a Sub Users account, click on **Administration** at the top of the screen. You will see a list of your Sub Users. You can use the search bar to search by name or email.

Click on the **Actions** box on the right to Edit, Reset a password or Block the Sub User.

Users

Users

Search for users: **Search** **Create new user**

Name	Roles	Locked out	Login count	Last login	Welcome email sent	Actions
Dan	SubUser	<input type="checkbox"/>	0	-	11/11/2015 15:58	<ul style="list-style-type: none"> Actions <li style="background-color: #4a86e8; color: white;">Edit Reset password Block user

Bring in a light to life

Please note: SuperDealers cannot set up or edit Sub Users. If you are a SuperDealer you will not see the Administration button at the top of your screen. Please contact VELUX if you need to add Sub Users on your account.

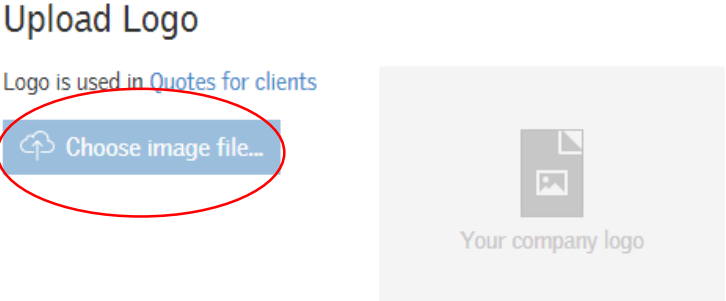
Upload Logo for Client Quotes

It is now possible to create quotations for you clients and personalize them to show your company logo and contact details, as well as the clients discount and any shipping charges which may apply.

To add a logo to your quotes for clients, click into the Account Info section at the top left of the screen



Click on Choose image file...



Select the file containing your company logo on your computer and click Open. Your logo should now appear in the box on the screen.

