



Below is the way we believe we currently have it INCORRECTLY set up



After reading through the online manual of instructions we are not able to understand how to achieve our required Client structure. We do understand this is achievable however fail to understand how to do this correctly after a number of trial attempts making up "test" client accounts.

How we understood the process:

Step 1 – Login using our Dealer username (Our dealer account)

	Accounts
Step 2 – Under Accounts tab select Create Account	Actions
Step 2 – Older Accounts tab select create Account	Create Account
	Search

Step 3 – Enter account info and select "Creator" as "Our dealer account" so as to have hierarchal permissions to administer this client and select required "Billing Plan" then OK:

* Account name: Create as:	New user C Existent user	from 4 to 50 characters
* User name:		from 4 to 50 characters
* User password:		from 1 character
* Confirm password:		]
Creator:	<b>∼</b>	]
Measurement system:	Metric	]
Separate billing:		
Billing plan:	fi <b></b>	]

Step 4 – Click on the newly created account and set "Account Properties" as required:

Account Properties - New test account										
General	Services	Restrictions	Access	Custom Fields	Statistics					

Step 5 – User has automatically been generated, select and set User Properties as required.

Users		▼ Name	Creator	Account	Last visit	Select
Actions	1	noorooppon	noorparcan	noosparoan	05.11.2015 16:17:23	delete
Create User	2	L			20.11.2015 14:20:21	delete
Send a Notice	3	n <del>neservices</del>	nootpursun	M.I E. OCI 1000	24.11.2015 07:31:17	delete
Search						
Filter: Text:	4	New test account	1	New test account		delete

User Properties – New test account												
General	Access	Advanced	Logs	Custom Fields	Manage Applications							

	Units	
	Actions	
Step 6 – Select "Create Unit"	Create Unit	
Step 6 – Select Create Unit		

## Step 7 – Enter Unit details etc

					New Unit												
General	Access Icon Adv				ced	Sensors	Custom Fields	Unit Gro	ups C								
Profile	Trip Det	ection	Fuel Cons	umption	n Service Intervals												
* Name: * Device type:	[	New un	<u>t</u>			to 50 characters LMU-700 Series	EELINK TK-116	EELINK TK-	115								
Unique ID: Phone number: Device access (																	
Creator: Account:		neetsupp Lynee mfeservi New test	pont		Choo	se a creator for	the unit. This user wi	ll have manag	je access ti								
Mileage counter	r: GR	sniperde techsupp testacco	ort unt		Current			km [	Auto								
Engine hours co GPRS traffic co			ion sensor eset Counter		Current Current			h L КВ [	Auto								

## Now 2 questions:

- 1. For Hierarchal and administering our clients units do we select them or our "Our dealer account" as Creator?
- 2. For "Account" "Our dealer account" is defaulted we need this to be assigned to the Client Account in order for the units to show under their account.
  - a. Do we need to login as "them" to create units in order for this to happen?

In the current <u>real setup below for our "XYZ Services</u>" client zero units "belong" to them – all their 6 units appear in our account only. Long term this will create difficulties in identifying which unit belongs to which client in order to administer or provide service/support.

	Account Contents – fleetpursuit																						
•	£	&	P	8	Þ	an a		P	盦	0	14			2	10-0 <sup>4</sup>	2	60	0000	000 000	A.	×	9	95
Total	5	8	8	4	-	3	2	-	16	2	4	9	8	10	4	-	-	24	8	1	4	1	-
fleetoursuit	1/500	4/500	8/500	4/500	-	3/500	2	-	12	1	1	5	5	4	4	-		23	8	1	4	1	-
M.F.E. Services	1	1	-	-	-	-	-	-	3	1	3	4	3	6	-	-		-	-	-	-	-	-
Test Account	1	1	-	-	-	-	-	-	1	-	-	-	-	-	-	-		1	-	-	-	-	-
Sniper Demo	1	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
New test account	1	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

We have tried to "Switch" units, in an attempt to test moving a unit created this way to another account but are not able. We attempted this using 1 of OUR units:

Image: Second secon	
Switch Account	×
Listed units will be transferred to another account (select one on the right); their creator will be changed.   Selected units: Destination account:   Fleet Demo 11   No appropriate accounts.	

We do believe we have gotten this client account for "XYZ Services" incorrectly setup but can live with this error as we do not wish to disrupt their services in order to correct.

We do however need to get things correct for future new client account setups.

Your assistance and clarification with this will be gratefully appreciated.