



TITLE: FRDC – User Setup (Administrator Only)	Training Doc No.	Page
	FRDC.USERSETUP.01	Title Page

Forest River Dealer Connect

User Setup



TITLE: FRDC – User Setup (Administrator Only)	Training Doc No. FRDC.USERSETUP.01	Page 1 of 13
--	---------------------------------------	------------------------

Table of Contents

Table of Contents	1
1. Purpose	2
2. Users Link (An Overview)	3
3. Users	6
A) Add New User	6
i) Templates.....	7
ii) Manufacturer Admin.....	8
B) Edit User	10
C) Disable User	11
D) Delete User	12
E) Resend Activation Email to User	12



TITLE: FRDC – User Setup (Administrator Only)	Training Doc No. FRDC.USERSETUP.01	Page Page 2 of 13
--	---------------------------------------	-----------------------------

1. Purpose

The purpose of these End User Procedures is to describe how to access the Users page of Forest River Dealer Connect and provide step-by-step directions on how to Add, Edit, Disable, and Delete Users.

Only Dealer Administrators will be able to access this section of Forest River Dealer Connect. This process is a critical first step on your dealership's implementation!

Document Tips & Tricks

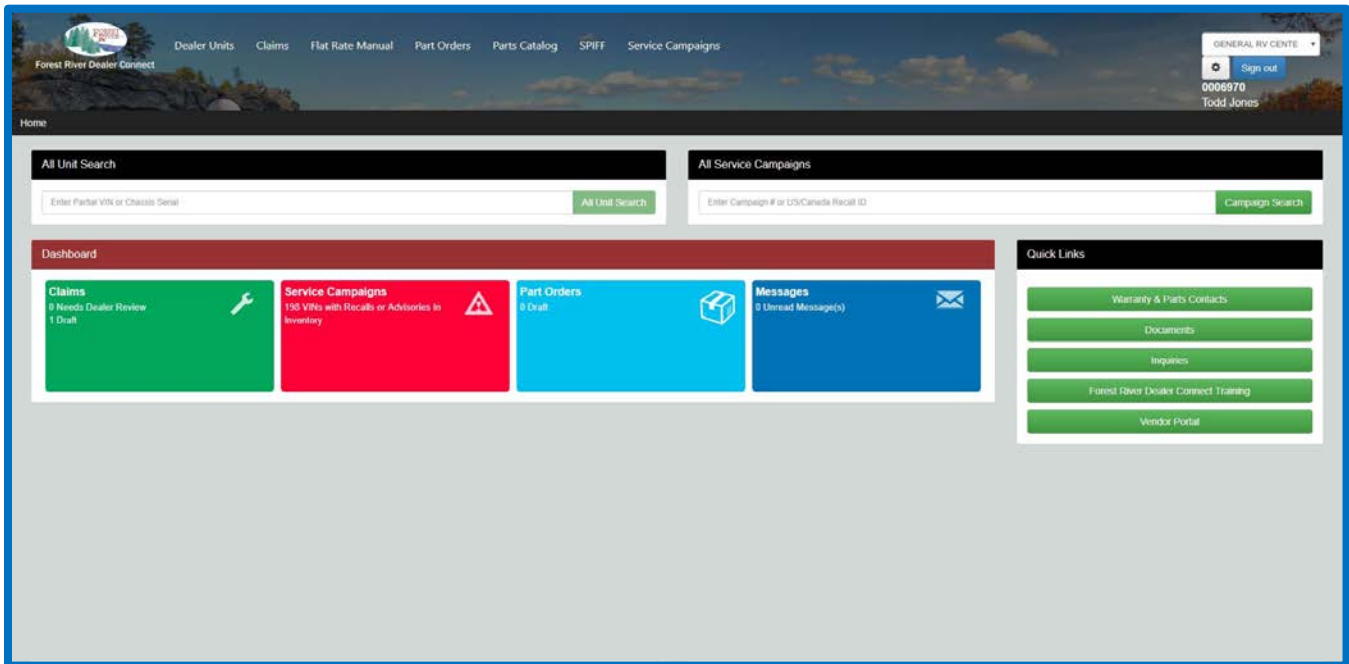
- You can search this document for key words or phrases by holding down the Ctrl key on your keyboard and pressing the F key. This will bring up the Search box which will allow you to key in a word or phrase and search for it throughout the document.
- The Contents index above is linked to each section within this document. So, if you click on the heading or subheading within the index that corresponds with the section you would like to review you can simply click on the heading or subheading and you will be taken to that section.



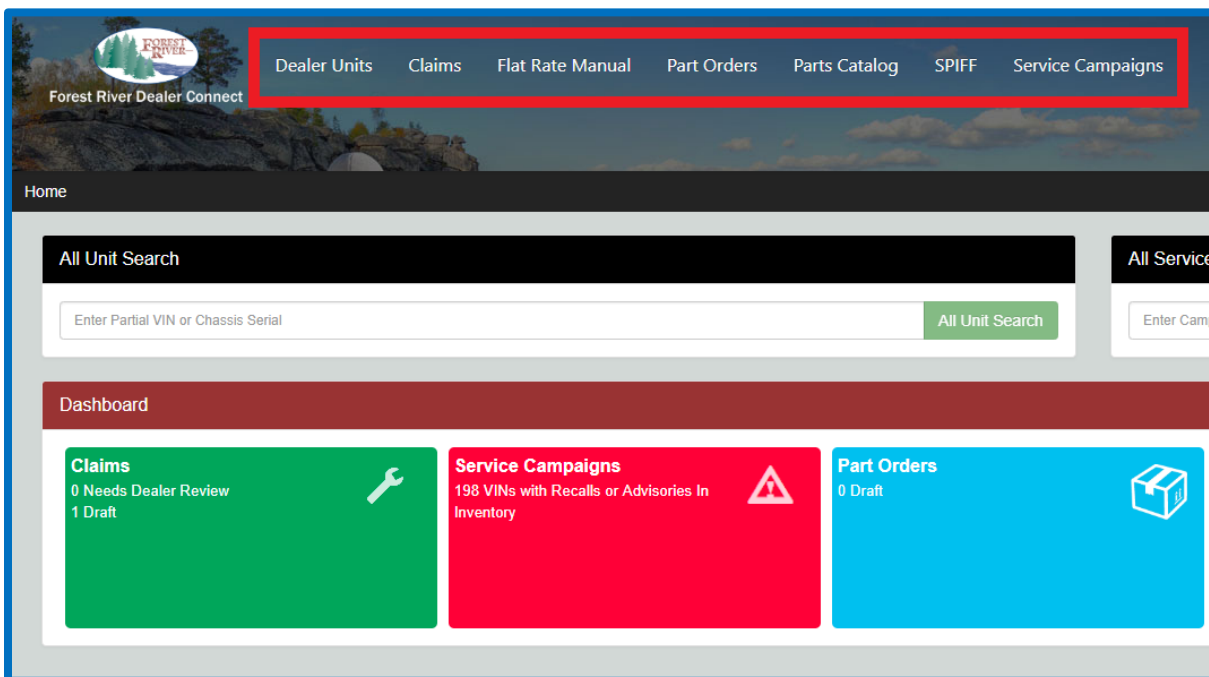
TITLE: FRDC – User Setup (Administrator Only)	Training Doc No.	Page
	FRDC.USERSETUP.01	Page 3 of 13

2. Users Link (An Overview)

When Forest River Dealer Connect loads onto your computer, your home page will look like this.



Across the top, you have links to assist with the most common activities you will be performing on Forest River Dealer Connect.



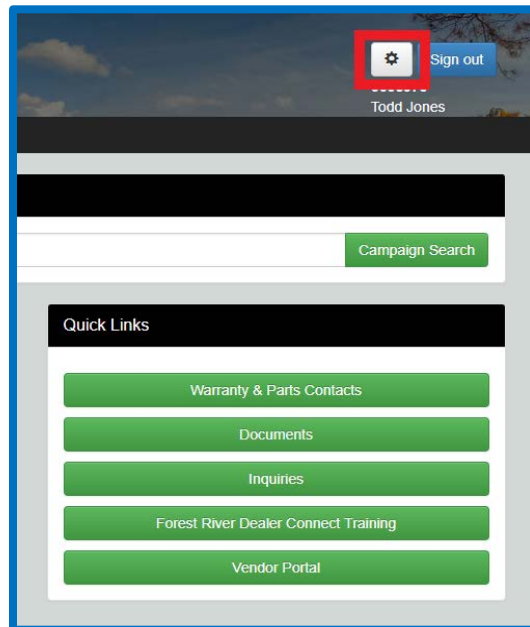
[Top of the Document](#)



TITLE: FRDC – User Setup (Administrator Only)	Training Doc No.	Page
	DC-USERSETUP1	4 of 13

Navigate: Home > Gear Icon > Users

In addition, you will see a **Gear** icon on the top right-hand side of your screen. In order to access the Users page of Forest River Dealer Connect, you will need to click on that icon.



When you click on the Gear icon, it will redirect you to the Profile page.



TITLE: FRDC – User Setup (Administrator Only)	Training Doc No.	Page
	DC-USERSSETUP1	5 of 13

On the left side of your screen, you will see several links (you will default to the Profile page). There is one link called **Users**. Click on it and it will take you to the User grid.

Users + User					
Name	Email	Activated	Enabled	Last Login	
Scott Aaenson	saaenson@test.com	✓	✓	10/30/2018	E D X
Doug Abbott	dabbott@test.com	✓	✓	10/30/2018	E D X
Terry Baughman	tbaughman@forestriverinc.com	✓	✓	11/6/2018	E D X
Roger Beller	rbeller@forestriverinc.com	✓	✓	11/15/2018	E D X
Zack Boseak	zboseak@forestriverinc.com	✓	✓	11/8/2018	E D X
Melissa Brace	mbrace@forestriverinc.com	✓	✓	11/15/2018	E D X
Joy Cripe	jcripe@forestriverinc.com	✓	✓	11/13/2018	E D X
John Doe	jdoe@rv123.com		✓		E D X C
Matt Fugiang	matt.fugiang@ramus.com	✓	✓	11/15/2018	E D X
Joe Gatto	gatto@test.com	✓	✓	11/14/2018	E D X
Noah Glenn	nglenn@forestriverinc.com	✓	✓	11/15/2018	E D X
Andrew Heim	andrew.heim@rsmus.com	✓	✓	11/14/2018	E D X
John Hilliard	jhilliard@forestriverinc.com	✓	✓	11/15/2018	E D X
Brittany Hoepfner	bhoepfner@forestriverinc.com	✓	✓	11/13/2018	E D X

Now you are ready to Add, Edit, Disable, and/or Delete Users.

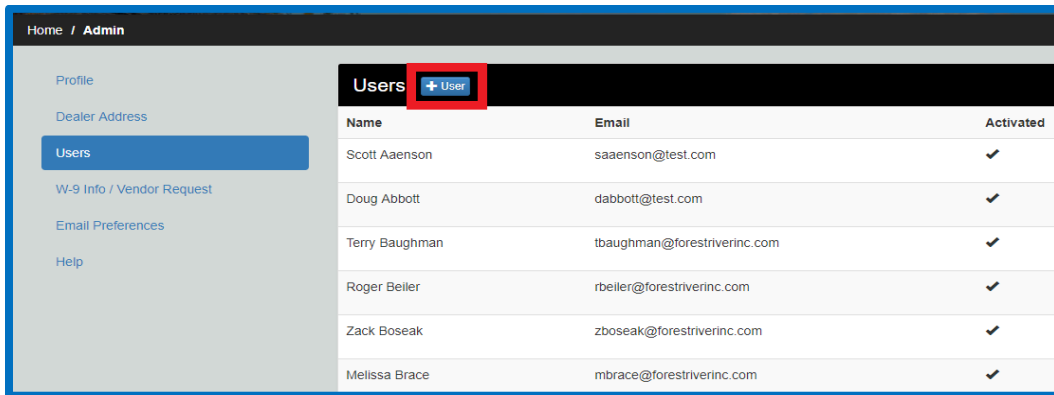


TITLE: FRDC – User Setup (Administrator Only)	Training Doc No.	Page
	DC-USERSETUP1	6 of 13

3. Users

A) Add New User

To add a new User, simply click on the blue **+ User** button.



A new window will appear that will ask for the new User's **First Name**, **Last Name**, and **Email**. You will also choose a **Primary Role**, such as Parts Clerk, Service Writer, etc. You can use several pre-filled templates to change the User's privileges all at once, or you can pick and choose which privileges the new User has access to, can Read, or can Update. Once you made all of your selections for the new User, you can click on the blue **Save** button; or if you decide not to add the new User, click on the grey **Close** button.



TITLE: FRDC – User Setup (Administrator Only)	Training Doc No. DC-USERSETUP1	Page 7 of 13
--	-----------------------------------	-----------------

The screenshot shows a 'User' setup form with the following fields: First Name, Last Name, Email, Primary Role (dropdown), Add Template (dropdown with 'Apply Template' button), and a Privileges table. The table lists various system functions and their assigned privilege levels.

Privilege	Privilege Level
Accounts Receivable Statement access	None Read Update
Claim form	None Read Update
Claims grid	None Read Update
Dealer units grid	None Read Update
Fiat rate main search	None Read Update
Fiat rate notes form	None Read Update
Links - contacts	None Read Update
Message board	None Read Update
Part catalog details	None Read Update
Part catalog search	None Read Update
Part order form	None Read Update
Part order invoices	None Read Update
Part orders grid	None Read Update

i) Templates

There are several templates to choose from and each of them provide different privileges. The templates that are available are **Dealer Administrator**, **Parts and Warranty Administrator**, **Parts Clerk**, **Warranty Clerk**, **Salesperson**, **Service Technician**, and **SPIFF Manager**. These templates provide the following privileges:

- **Dealer Administrator** – This template gives the User access to all privileges with an Update privilege level.
- **Parts and Warranty Administrator** – This template gives the User access to all privileges regarding parts and warranty with an Update privilege aside from Links – Contacts, Retail Registration Form, and Setup Dealer Address Grid which are at a Read privilege level. All other privileges are disabled.
- **Parts Clerk** – This template gives the same privileges as Parts and Warranty Administrator but restricts the warranty privileges to Read privilege level.
- **Warranty Clerk** – This template also gives the same privileges as Parts and Warranty Super User but restricts the parts privileges to Read privilege level.
- **Salesperson** – This template gives privileges to access and search within several areas but no access to Part Orders or Claims and Read privilege level for some of the search functions. In addition this template will allow for Update privilege level to SPIFF Grid, SPIFF Register Form, and Unit Invoices.
- **Service Technician** – This template gives Read privilege level for most warranty and parts functions but no Update privileges for submitting claims or part orders. All other privileges are disabled.



TITLE: FRDC – User Setup (Administrator Only)	Training Doc No.	Page
	DC-USERSETUP1	8 of 13

- **SPIFF Manager** – This template gives limited access to parts and warranty functions at a Read privilege level but gives Update privilege level for all SPIFF and Setup functions.

ii) **Manufacturer Admin**

In addition to being able to add Users for your dealership you can also add a Manufacturer Admin which will allow a Forest River Employee to access your dealership’s account and help with issues that might arise. To do this you would click on the blue + **User** button.

The screenshot shows the 'Admin' section of the Forest River system. On the left is a navigation menu with options: Profile, Dealer Address, Users (highlighted), W-9 Info / Vendor Request, Email Preferences, and Help. The main content area is titled 'Users' and features a '+ User' button highlighted with a red box. Below this is a table of existing users:

Name	Email	Activated
Scott Aaenson	saaenson@test.com	✓
Doug Abbott	dabbott@test.com	✓
Terry Baughman	tbaughman@forestriverinc.com	✓
Roger Beiler	rbeiler@forestriverinc.com	✓
Zack Boseak	zboseak@forestriverinc.com	✓
Melissa Brace	mbrace@forestriverinc.com	✓

From there you would enter the Manufacturer Admin’s information and set the Primary Role as Manufacturer Admin. You can then choose from one of the templates or designate which permissions the Manufacturer Admin will have manually.



TITLE: FRDC – User Setup (Administrator Only)	Training Doc No.	Page
	DC-USERSETUP1	9 of 13

User Save Close

First Name Last Name

Email

Primary Role

Add Template Apply Template

Privilege	Privilege Level
Accounts Receivable Statement access	None Read Update
Claim form	None Read Update
Claims grid	None Read Update
Dealer units grid	None Read Update
Flat rate main search	None Read Update
Flat rate notes form	None Read Update
Links - contacts	None Read Update
Message board	None Read Update
Part catalog details	None Read Update
Part catalog search	None Read Update
Part order form	None Read Update
Part order invoices	None Read Update
Part orders grid	None Read Update

Once you are done click on the blue **Save** button and an activation email will be sent to the Manufacturer Admin so that they can access your dealership's account. **Note: There is no limit to the amount of Manufacturer Admins you can have and this is a great way to get troubleshooting assistance when issues arise.**



TITLE: FRDC – User Setup (Administrator Only)	Training Doc No.	Page
	DC-USERSETUP1	10 of 13

B) Edit User

To edit a User’s access, click on the light blue **Edit User** Icon.

Name	Email	Activated	Enabled	Last Login		
Scott Aaenson	saaenson@test.com	✓	✓	10/30/2018		
Doug Abbott	dabbott@test.com	✓	✓	10/30/2018		
Terry Baughman	tbaughman@forestriverinc.com	✓	✓	11/6/2018		
Roger Beller	rbeller@forestriverinc.com	✓	✓	11/15/2018		
Zack Boseak	zboseak@forestriverinc.com	✓	✓	11/8/2018		
Melissa Brace	mbrace@forestriverinc.com	✓	✓	11/15/2018		
Joy Cripe	jcripe@forestriverinc.com	✓	✓	11/13/2018		
John Doe	jdoe@rv123.com		✓			
Matt Fugisang	matt.fugisang@rsmus.com	✓	✓	11/15/2018		
Joe Gatto	gatto@test.com	✓	✓	11/14/2018		
Noah Glenn	nglenn@forestriverinc.com	✓	✓	11/15/2018		
Andrew Heim	andrew.heim@rsmus.com	✓	✓	11/14/2018		
John Hilliard	jhilliard@forestriverinc.com	✓	✓	11/15/2018		
Brittany Hoepfner	bhoepfner@forestriverinc.com	✓	✓	11/13/2018		

The User grid will appear and you can edit the User’s privileges.



TITLE: FRDC – User Setup (Administrator Only)	Training Doc No.	Page
	DC-USERSSETUP1	11 of 13

Privilege	Privilege Level
Accounts Receivable Statement access	None Read Update
Claim form	None Read Update
Claims grid	None Read Update
Dealer units grid	None Read Update
Fiat rate main search	None Read Update
Fiat rate notes form	None Read Update
Links - contacts	None Read Update
Message board	None Read Update
Part catalog details	None Read Update
Part catalog search	None Read Update
Part order form	None Read Update
Part order invoices	None Read Update
Part orders grid	None Read Update

C) Disable User

To disable a User's access, click on the white **Disable User** Icon, which is denoted by the pause sign. Common reasons for disabling a User's access would be if they went on administrative, medical, or maternity/paternity leave.

Name	Email	Activated	Enabled	Last Login	Action
Scott Aaenson	saaenson@test.com	✓	✓	10/30/2018	[Pause] [X]
Doug Abbott	dabbott@test.com	✓	✓	10/30/2018	[Pause] [X]
Terry Baughman	tbaughman@forestriverinc.com	✓	✓	11/6/2018	[Pause] [X]
Roger Beiler	rbeiler@forestriverinc.com	✓	✓	11/15/2018	[Pause] [X]
Zack Boseak	zboseak@forestriverinc.com	✓	✓	11/8/2018	[Pause] [X]
Melissa Brace	mbrace@forestriverinc.com	✓	✓	11/15/2018	[Pause] [X]
Joy Cripe	jcripe@forestriverinc.com	✓	✓	11/13/2018	[Pause] [X]
John Doe	jdoe@rv123.com		✓		[Pause] [X] [Refresh]
Matt Fuglsang	matt.fuglsang@rsmus.com	✓	✓	11/15/2018	[Pause] [X]
Joe Gatto	gatto@test.com	✓	✓	11/14/2018	[Pause] [X]
Noah Glenn	naglenn@forestriverinc.com	✓	✓	11/15/2018	[Pause] [X]
Andrew Heim	andrew.heim@rsmus.com	✓	✓	11/14/2018	[Pause] [X]
John Hilliard	jhilliard@forestriverinc.com	✓	✓	11/15/2018	[Pause] [X]
Brittany Hoepfner	bhoepfner@forestriverinc.com	✓	✓	11/13/2018	[Pause] [X]



TITLE: FRDC – User Setup (Administrator Only)	Training Doc No.	Page
	DC-USERSSETUP1	12 of 13

If you would like to re-enable the User’s access, simply click on the same icon, which should now be **Enable User**, and is denoted by a play sign.

D) Delete User

To delete a User’s profile, click on the red **Delete User** Icon denoted by an **X**. The most common reason for deleting a User would be if they were terminated or left the organization.

Name	Email	Activated	Enabled	Last Login	Action
Scott Aaenson	saaenson@test.com	✓	✓	10/30/2018	[Email] [X]
Doug Abbott	dabbott@test.com	✓	✓	10/30/2018	[Email] [X]
Terry Baughman	tbaughman@forestriverinc.com	✓	✓	11/6/2018	[Email] [X]
Roger Beiler	rbeiler@forestriverinc.com	✓	✓	11/15/2018	[Email] [X]
Zack Boseak	zboseak@forestriverinc.com	✓	✓	11/8/2018	[Email] [X]
Melissa Brace	mbrace@forestriverinc.com	✓	✓	11/15/2018	[Email] [X]
Joy Cripe	jcrpe@forestriverinc.com	✓	✓	11/13/2018	[Email] [X]
John Doe	jdoe@rv123.com		✓		[Email] [X] [Replay]
Matt Fuglsang	matt.fuglsang@rsmus.com	✓	✓	11/15/2018	[Email] [X]
Joe Gatto	gatto@test.com	✓	✓	11/14/2018	[Email] [X]
Noah Glenn	nglenn@forestriverinc.com	✓	✓	11/15/2018	[Email] [X]
Andrew Heim	andrew.heim@rsmus.com	✓	✓	11/14/2018	[Email] [X]
John Hilliard	jhilliard@forestriverinc.com	✓	✓	11/15/2018	[Email] [X]
Brittany Hoepfner	bhoepfner@forestriverinc.com	✓	✓	11/13/2018	[Email] [X]

E) Resend Activation Email to User

When you first set up a new User an activation email will be sent to them. If the User does not receive the activation email check to make sure the email is correct and then click on the green Replay button to re-send the activation email.



TITLE: FRDC – User Setup (Administrator Only)	Training Doc No.	Page
	DC-USERSETUP1	13 of 13

Name	Email	Activated	Enabled	Last Login	
Scott Aaenson	saaenson@test.com	✓	✓	10/30/2018	
Doug Abbott	dabbott@test.com	✓	✓	10/30/2018	
Terry Baughman	tbaughman@forestriverinc.com	✓	✓	11/27/2018	
Roger Beiler	rbeiler@forestriverinc.com	✓	✓	11/29/2018	
Zack Boseak	zboseak@forestriverinc.com	✓	✓	11/8/2018	
Melissa Brace	mbrace@forestriverinc.com	✓	✓	11/29/2018	
Joy Cripe	jcripe@forestriverinc.com	✓	✓	12/4/2018	
John Doe	jdoe@rv123.com		✓		
Matt Fuglsang	matt.fuglsang@rsmus.com	✓	✓	12/4/2018	
Joe Gatto	gatto@test.com	✓	✓	11/14/2018	
Noah Glenn	nglenn@forestriverinc.com	✓	✓	12/4/2018	
Andrew Heim	andrew.heim@rsmus.com	✓	✓	12/4/2018	
John Hilliard	jhilliard@forestriverinc.com	✓	✓	12/4/2018	
Brittany Hoepner	bhoepner@forestriverinc.com	✓	✓	11/29/2018	

For more information regarding specific areas of the dealer portal, please see the Forest River Dealer Connect Training section under Quick Links for additional training materials.