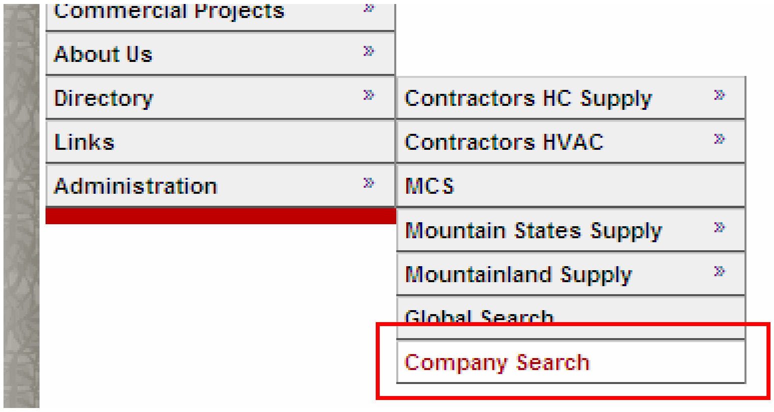
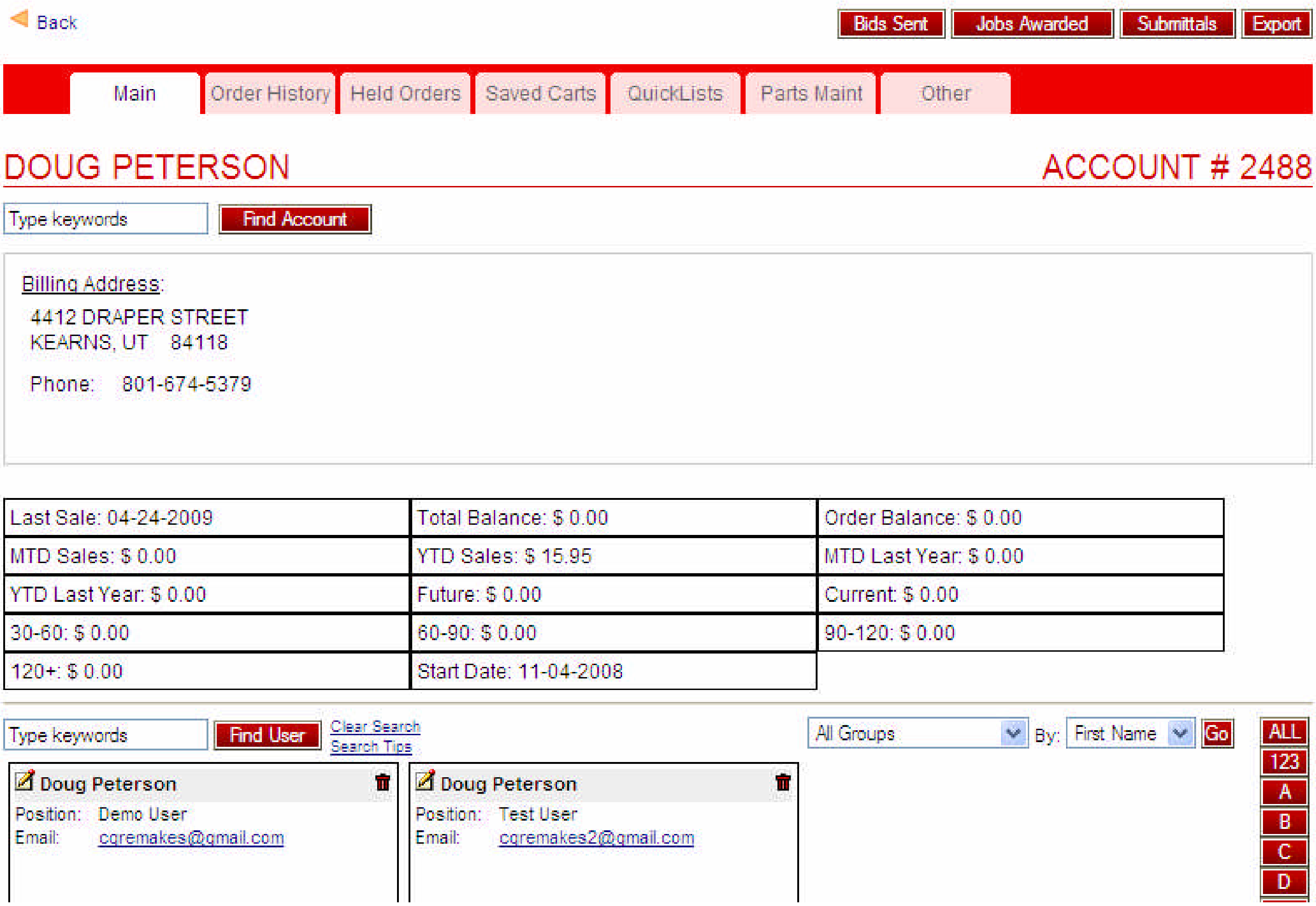


To add a user to ANY company (account, affiliate, manufacturer, etc), log into your respective company's website, hover over "Directory", and go down to "Company Search". Affiliates can also be added elsewhere, but I will not cover that, here.

This will bring you to a screen that looks similar to the above image. In the upper left corner, there will be a search box. This is where you will search for the company to which you wish to add a user. You also have the option to "drill down" to the company by clicking on the name of the company's parent (eg "All Companies", "All Affiliate Companies", etc). To the right of the path to the company, there may be an option to "Add Company". This is where you click ot add a new company to the parent ("Home > All Companies > All Affiliate Companies > Mountain States Supply" in the above example). A note on adding new Account companies: they are only added to the web database! Any companies added on the web will NOT appear in AccuTerm.

When the search returns the company results, there will be a binocular icon, a pencil and paper (if you have access to edit the company). To view the company itself, click on the binoculars. If you wish to edit the company information, click on the pencil / paper. To delete a company (if you have access), click on the garbage can to the right of the company information.

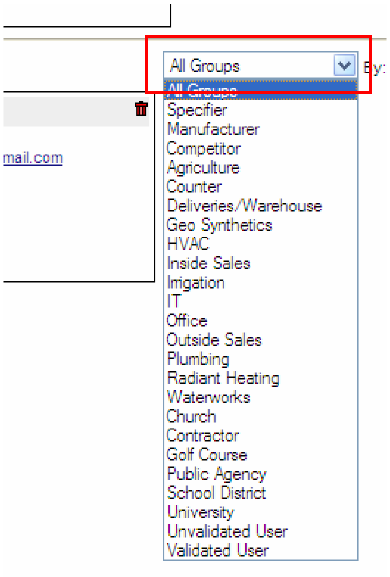


Once you've selected the company to which you wish to add the user, it will bring up a screen resembling the above screen. Across the top, there are several buttons. "Bids Sent" is a report of all bids sent to this company, "Jobs Awarded" is a report of all jobs that have been awarded to this company, "Submittals" will list all submittals generated for this company (customers have this button, as well, so they are able to go in and re-download any submitalls we have generated for them, without needing to contact anyone), and "Export" will export all users from this company to a CSV file, which can be opened in Excel, or any spreadsheet program.

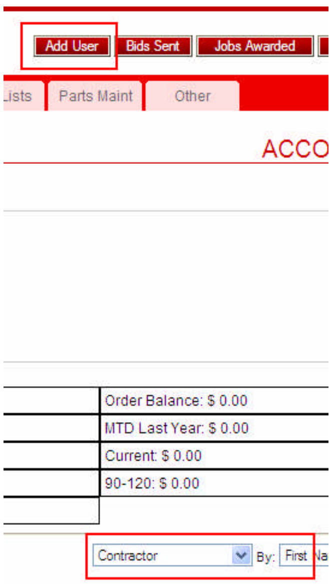
Below this, there are several tabs (most of which will not appear for you, yet). "Main" is the default tab, displaying basic contact information for this customer (address, phone, fax, salesman, etc). Below that, basic account information is displayed. When you click on "Other", customer information, such as gross profit, will be displayed. This information is on a different tab, to prevent customers from accidentally viewing this information during the signup process.

Below, all users belonging to this company are displayed, along with basic contact information that pertains them. You can search for a specific user by name, or you can filter the users by group type, but most often, there will only be one group type per company. You can also display users by first name, last name, and priority. If priority is selected, you are able to drag and drop the users in the order you wish for them to appear. You are only able to do this for the users of which you have access to modify. On the right, there are letters you can click on if you wish to just display users that start with that letter.

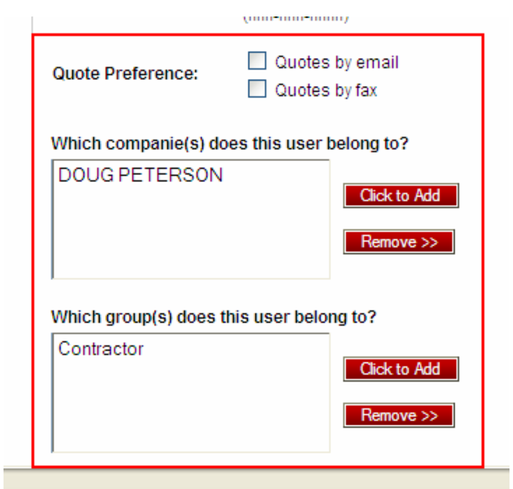
To the left of the user's name, there is a pencil/paper icon. This is where you go to modify the respective user. To the right, there is a garbage can. This is where you click to delete the user.



Now, to add a new user to this company, you must specify the group type to which you wish to add this user. Click on the drop down box to view which groups to which you have access to add (it will vary, depending on the user).



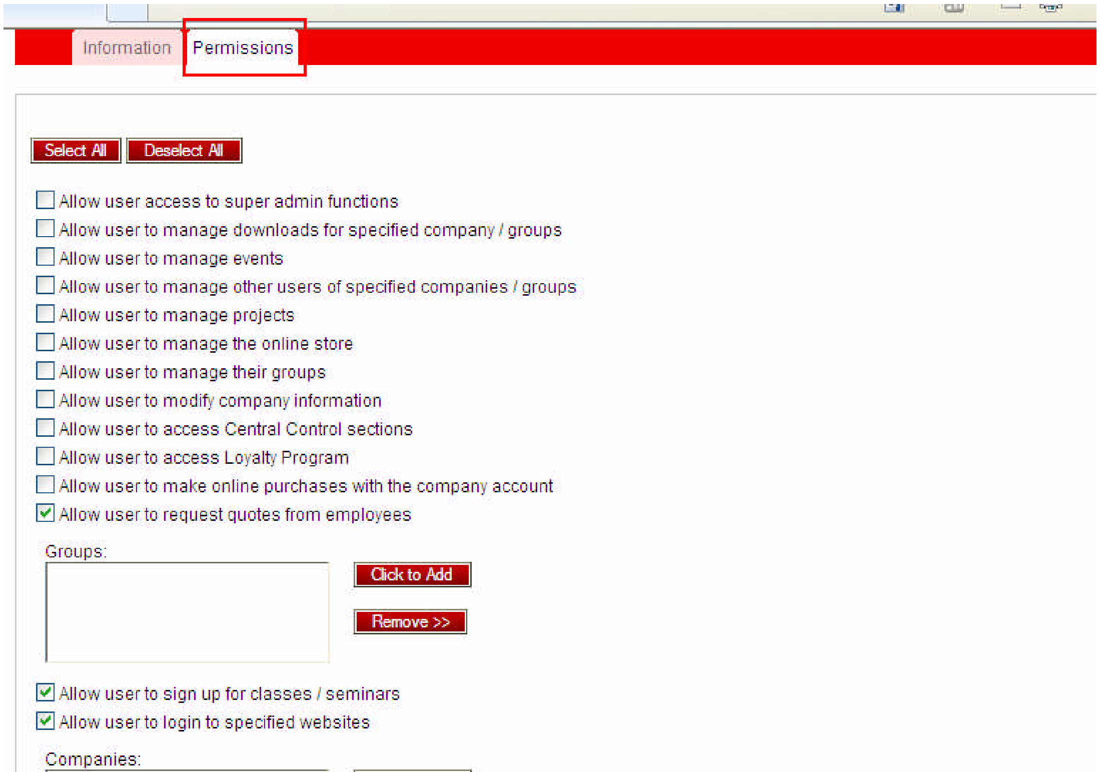
Once you've selected the group, a new button will appear at the top that says "Add User". Click on this button



Within the "Information" tab, this is where you fill out basic contact information / preferences for this user. The only required fields are first/last name, position, and username (if they will be logging into the website). You can either specify a password, or click on "Generate", to just send them a randomly generated password. Most of this is self-explanatory, but towards the bottom, for users such as contractors, there will be an option that says "Quote Preference". This is for users who wish to receive quotes from the website. They can receive quotes either by email and/or by fax. Check whichever applies (or leave blank if they will not be receiving quotes). Below that, it will list all companies to which the user belongs. To add more, click on "Click to Add" to the right. You will be searching for the company in a specified database, just as explained at the beginning of this tutorial.

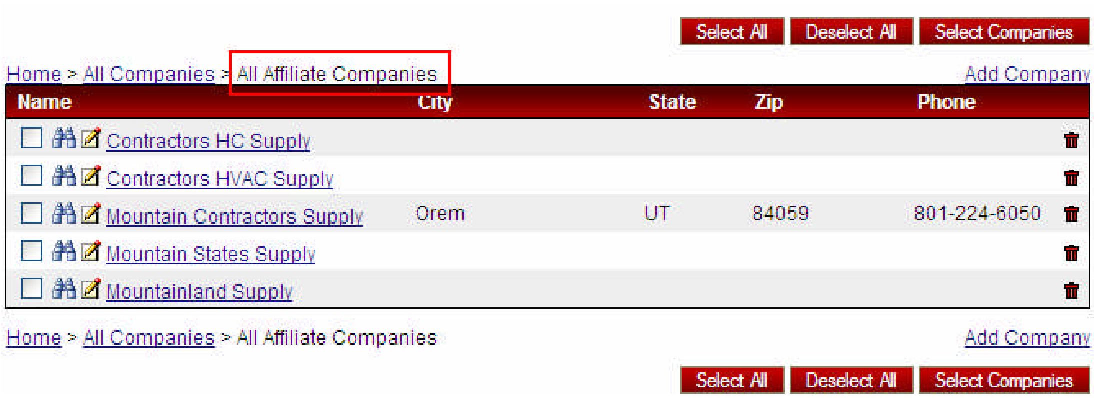
To remove, highlight the company(s) (to select more than 1, hold down ctrl, and click on the company you wish to remove), and click on "remove".

The procedure is the same for groups, except that you do not need to search for a group. All available groups are listed, with a +/- sign for those that contain sub groups.



Upon clicking on the “Permissions” tab at the top, you will be given a list of all the permissions you can grant to this user. Depending on the group you have selected for this user, various permissions will be selected by default. To view a description of what the permission will grant this user, hover over the respective permission. To grant the user a permission, click on the checkbox to the left of the permission. Some permissions require further specification of which company / group you are are granting access to the user, such as the “Allow user to request quotes from employees” above. To add a new company / group, click on “Click to Add”, just as specifying company / group information in the previous step. Specifying the group for “Allow user to request quotes” permission specifies which department’s project information the user will have access to view / request.

The “Allow user to login to specified websites” is a very important permission. This is where you will physically grant the user the ability to login to our websites. You MUST specify which website(s) they are able to login to, or they will not be able to login. To grant access to a specific website, click on “Click to Add” to the right of “Companies” below the “Allow user to login to specified websites”.



Make sure the header above ends with “All Affiliate Companies”. When you do that, it will list the main company names (no branches). Select the name of the company(s) to which this user will be able to login, and click on “Select Companies”.

This concludes the tutorial for adding new users. I’ve tried to make the process as simple as possible for such a complex program. Please inform me of any bugs you encounter, and I will fix them as quickly as I can. Let me know if anything is not clear, and I will do my best to clarify.