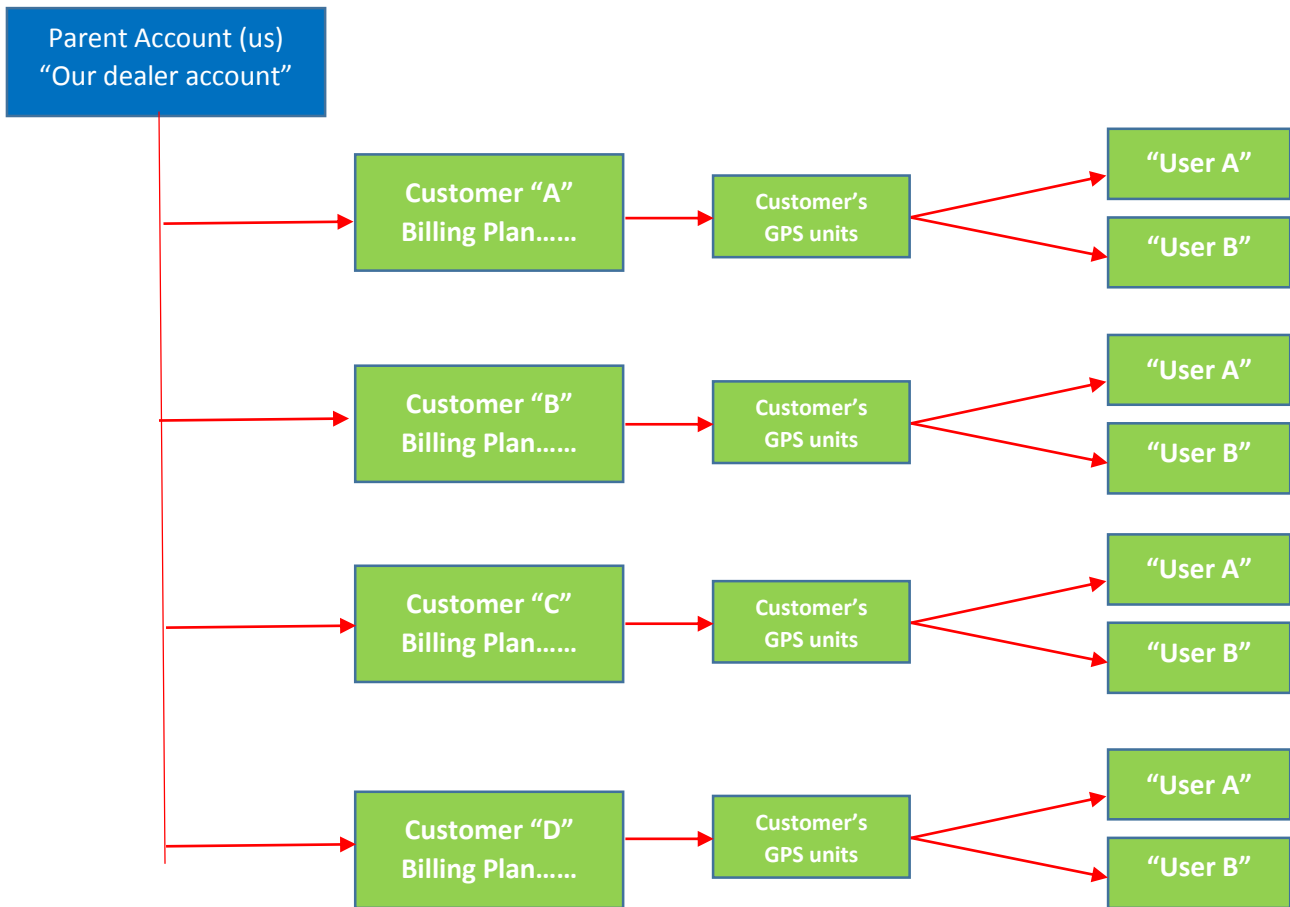
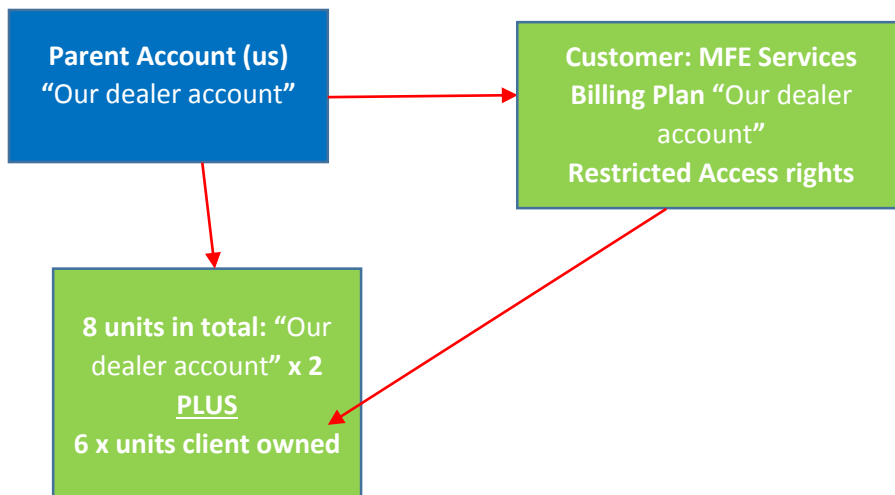


Account/Customer Structure Needed



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

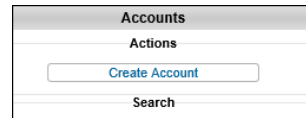


After reading through the online manual of instructions we are not able to understand how to achieve our required Client structure. We do understand this is achievable however fail to understand how to do this correctly after a number of trial attempts making up “test” client accounts.

How we understood the process:

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

Step 2 – Under Accounts tab select **Create Account**

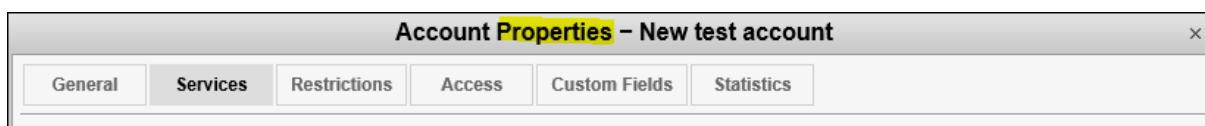


Step 3 – Enter account info and select “Creator” as “Our dealer account” so as to have hierarchal permissions to administer this client and select required “Billing Plan” then OK:

The screenshot shows a form for creating a new account. Fields include:

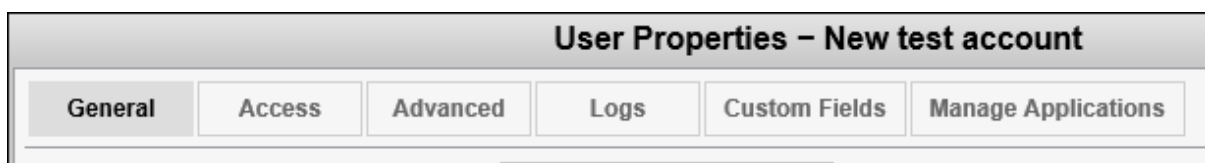
- * Account name: New account (highlighted in yellow)
- Create as: New user, Existent user
- * User name: (empty)
- * User password: (empty)
- * Confirm password: (empty)
- Creator: (dropdown menu, highlighted in yellow)
- Measurement system: Metric (dropdown menu)
- Separate billing:
- Billing plan: (dropdown menu)

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

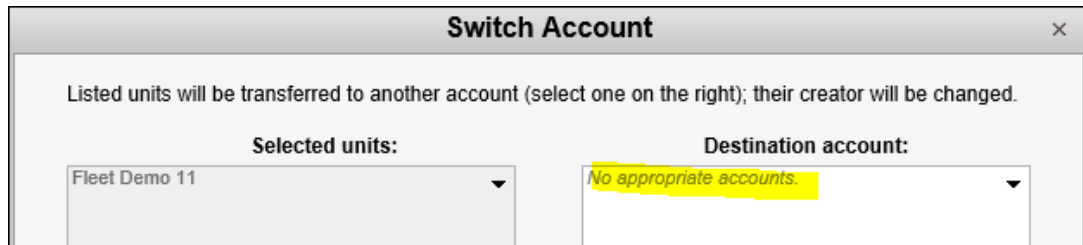
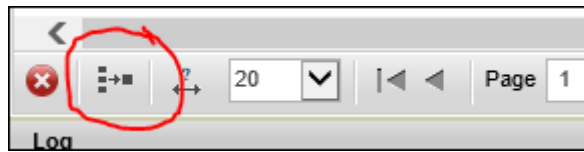


Step 5 – User has automatically been generated, select and set User Properties as required.

	Name	Creator	Account	Last visit	Select
1	[redacted]	[redacted]	[redacted]	05.11.2015 16:17:23	delete
2	[redacted]	[redacted]	[redacted]	20.11.2015 14:20:21	delete
3	[redacted]	[redacted]	[redacted]	24.11.2015 07:31:17	delete
4	New test account	[redacted]	New test account		delete



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:



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.