



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)

ten 2 – Under Accounts tab select Create Account	Accounts
	Actions
Step 2 Shaci Accounts tab scient 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 Existent user	from 4 to 50 characters
* User name:		from 4 to 50 characters
* User password:		from 1 character
* Confirm password:]
Creator:	∼]
Measurement system:	Metric]
Separate billing:		
Billing plan:	fi]

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		noosparaan	noorparoen	05.11.2015 16:17:23	delete
Create User	2	L		<u> </u>	20.11.2015 14:20:21	delete
Send a Notice	3	n neservices	neetpursuit	W.T.L. 0011000	24.11.2015 07:31:17	delete
Filter. Text:	4	New test account	ſ	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 7 – Enter Unit details etc

				New Unit												
General	Access	Access Icon Ad			nsors	Custom Fields	Unit Groups	Co								
Profile	Trip Detec	tion Fuel Cons	sumption	n Service Intervals												
* Name: * Device type: Unique ID:		lew unit		from 4 to 50 ch	aracters)0 Series	EELINK TK-116	EELINK TK-115									
Phone number: Device access	password:															
Creator: Account:	IIIC Ly M	ersuppon nee feservices ew test account		Choose a cr	eator for th	ne unit. This user will	have manage acc	ess to								
Mileage counter	r: GF	iperdemo chsupport staccount	c	rrent value:	0		km 🗆 Aut	to								
Engine hours co GPRS traffic co	unter: Engin	Reset Counter	Cu	rrent value: rrent value:	0		h 🗌 Aut	to to								

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	ÞĻ	ал 1		Pa	盦	0	14			2	6-0 ^k	8	60	0000	B	A	×	9	999
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.