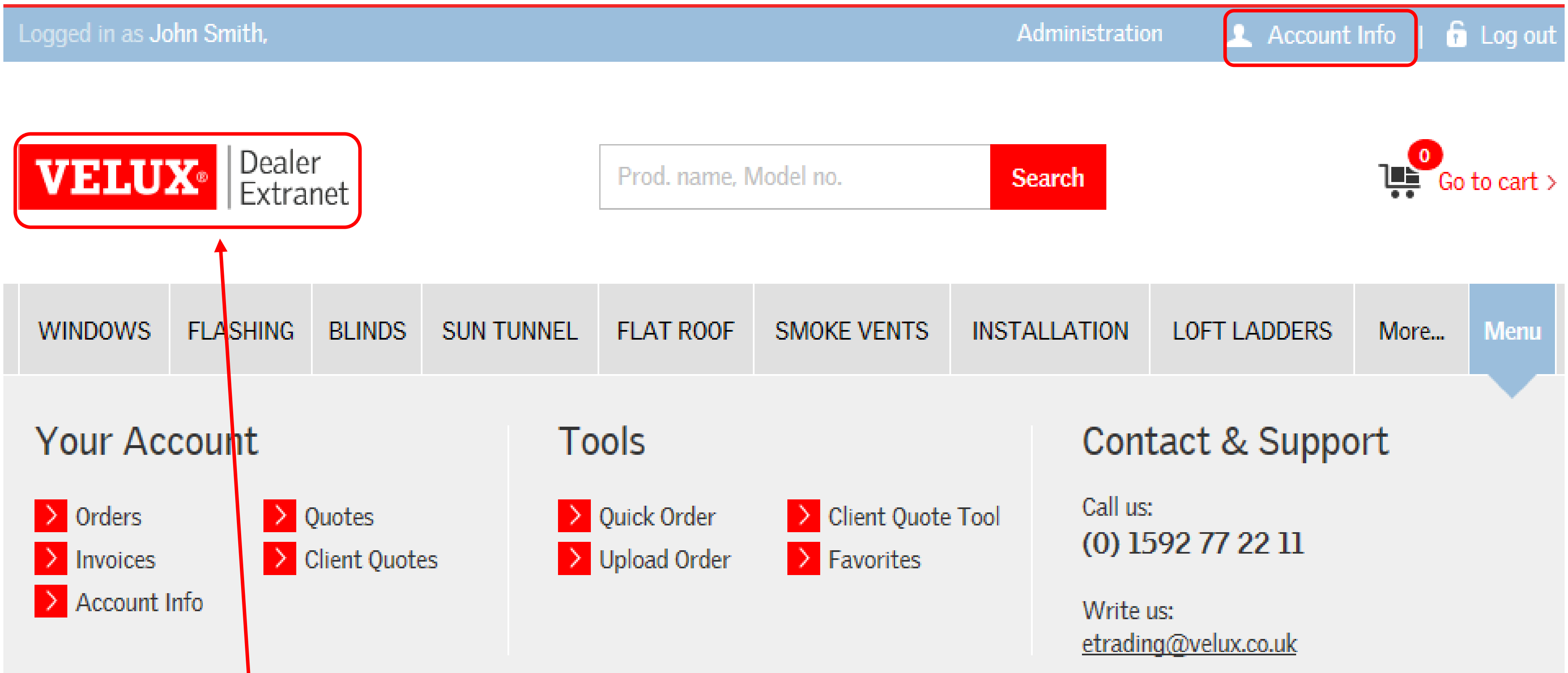
Dealer Extranet 3
Account Information Guide

Contents:

Account information

To access your Account Information, click on **Account Info** at the top left of the screen.

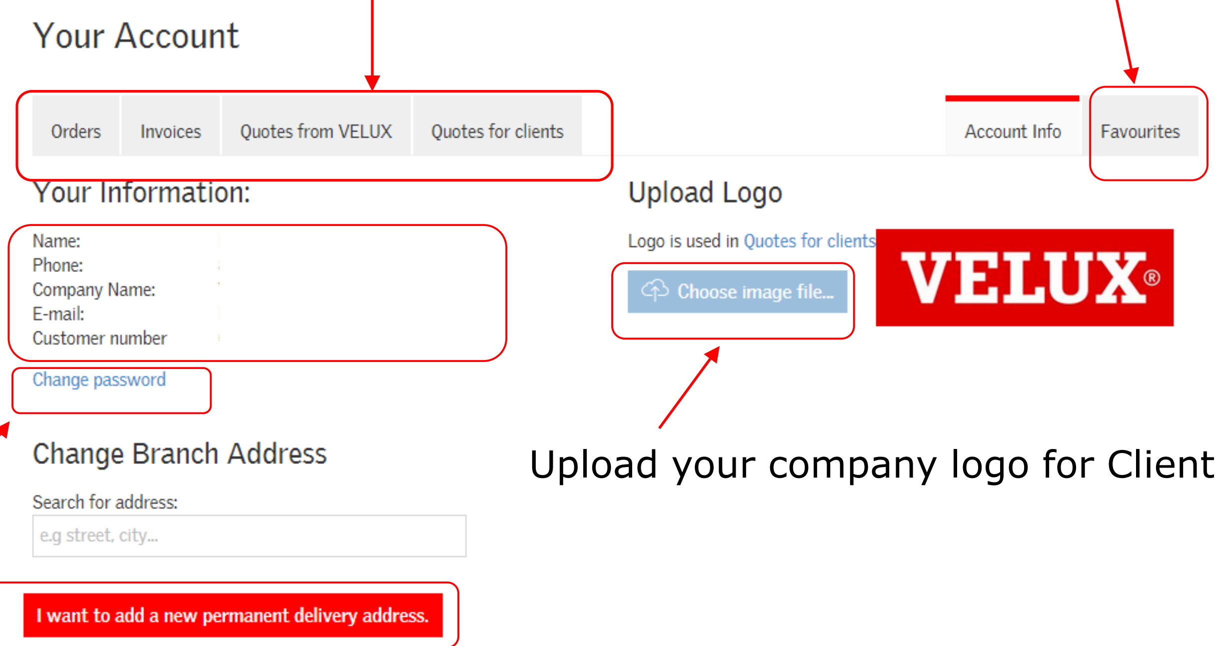


Return to the "home page" at any time by clicking on the logo.

Account information

Search and view your Orders, Invoices, Quotes from VELUX and Quotes for Clients

View your favourites



View the details we have on file for you

Upload your company logo for Client Quotes

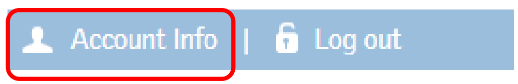
Click here to change your password

Request additional permanent delivery address(es) to be added. This is useful for warehouses and deliveries to port for merchants based on Islands.

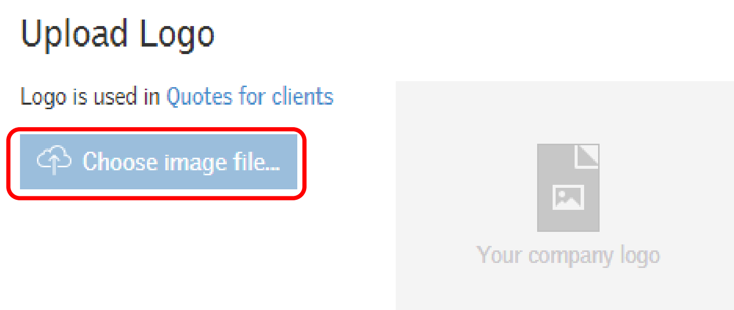
Upload Logo for Client Quotes

It is now possible to create quotations for you clients and personalize them to show your company logo and contact details, as well as the clients discount and any shipping charges which may apply.

To add a logo to your quotes for clients, click into the Account Info section at the top left of the screen



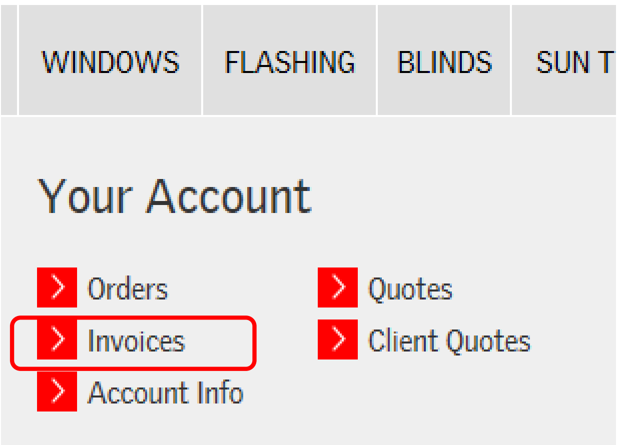
Click on Choose image file…

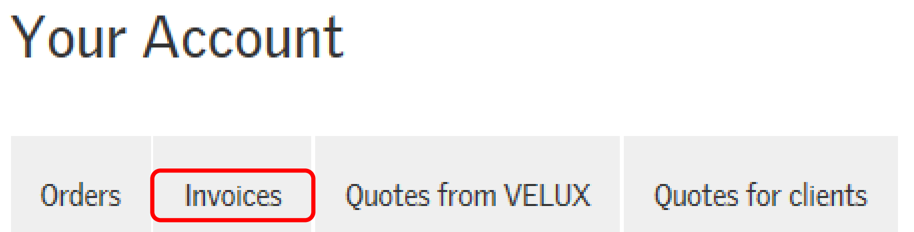


Select the file containing your company logo on your computer and click Open. Your logo should now appear in the box on the screen.

Search/View Invoices

If you need to search for an invoice, click on **Invoices** in the Your Account section which can be found either on the **Home Page** or in the **Account Info** screen.

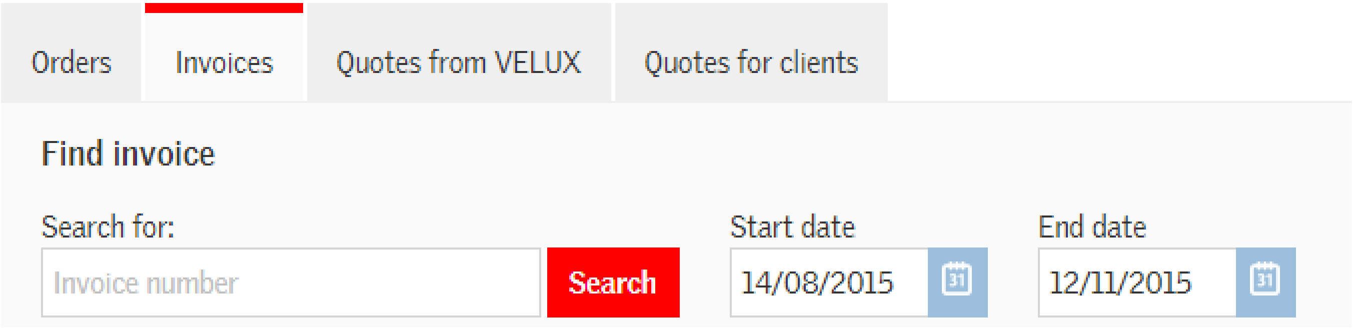




You will not be able to view invoices which are sent to a third party such as a buying group (NMBS etc.)

Search/View Invoices

You can search by invoice no. or select a date range to view.
Once you locate the invoice you want, click on the Invoice Number to view it.

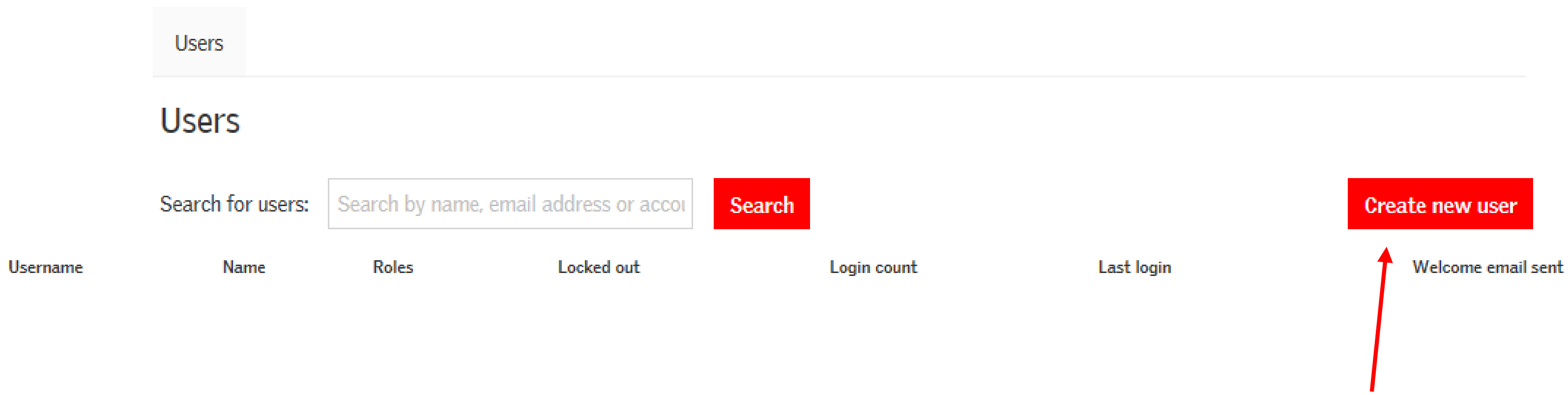


Sub Users - Creating

If other members of staff also need to use DE3, then anyone with a Dealer account can set up Sub Users.

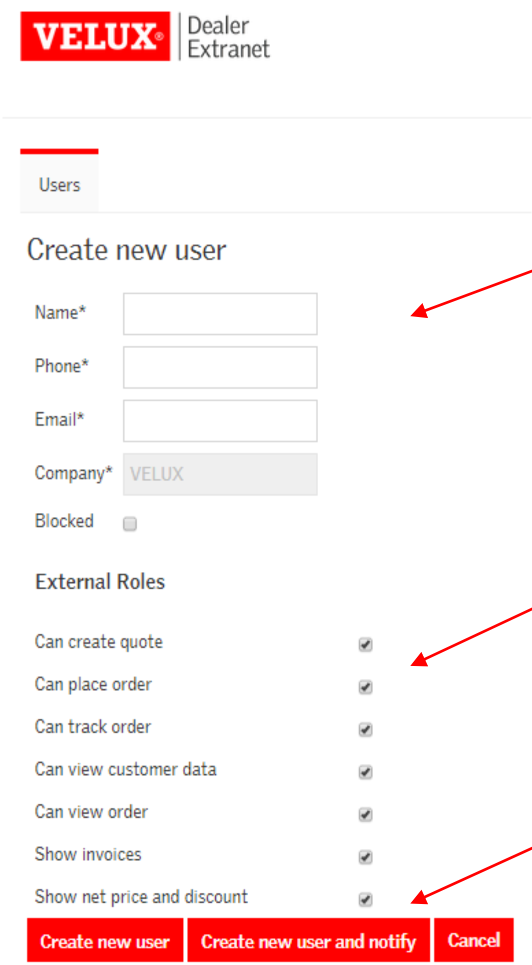
Sub Users can have as much or as little access as you like. For example you may want the goods-in staff to be able to view and track orders but not be able to place any orders. Whereas, someone from the accounts department could have access to view invoices. You should create your own sub user(s), VELUX do not have access to do this for you.

When you log into your account, click on the Administration button at the top of the page



Here you will see a list of any existing Sub users on the account. Click **Create new user**

Sub Users - Creating



Please fill in all the details for the user.

If you would like to remove any of the roles from a user, just click on the box to remove the tick

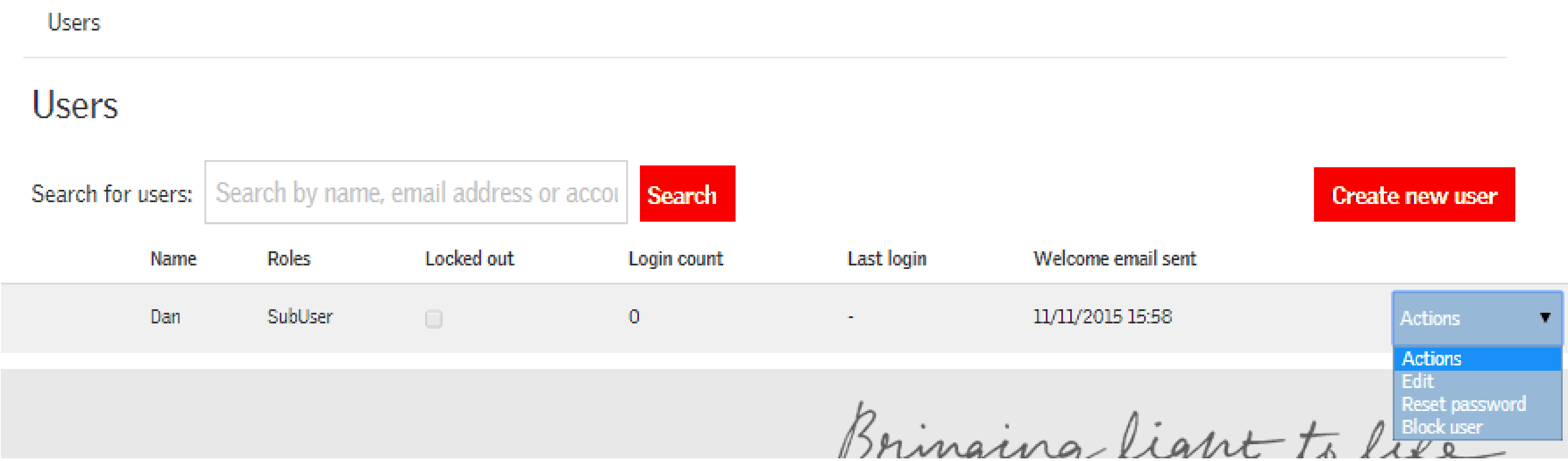
Once you are happy, click on **Create new user and notify**. They will then receive an email from us to log on and create a password.

Please note the email address that you enter will be the username. Only one email address can be used per customer account.

Sub Users - Editing

If you need to edit a Sub Users account, click on Administration at the top of the screen. You will see a list of your Sub Users. You can use the search bar to search by name or email.

Click on the **Actions** box on the right to Edit, Reset a password or Block the Sub User.



Please note: SuperDealers cannot set up or edit Sub Users. If you are a SuperDealer you will not see the Administration button at the top of your screen. Please contact VELUX if you need to add additional Users on your account.

Super Dealers

Super Dealers have access to place orders, prepare quotes, track deliveries and/or view invoices for a number of branches. To request Super Dealer access, or to add/amend the accounts on an existing Super Dealer account, please email etrading@velux.co.uk

Please include the following information on your email:

The email address you use as your User name.

The account number of the branch(es) you need access to.

If you do not know the branch account number(s) please provide the full name and address of each branch.

Once this has been set up you will be able to select which branch you want to view or place orders for from a drop down box.