Managing Dealer Positions

Objectives

- This guide will explain how to find a specific dealer position.
- This guide will explain how to create and edit address information.
- A "Dealer Position" is a unique shorthand for a specific delivery address.

Instructions

Step 1: Navigate to the "Dealer Positions" Page

- 1. Hover your cursor over "Account Info"
- 2. Select the "Dealer Positions" option

Service Software Product Or	dering Syster	n		CAT	ERPILLAR [®]
SERVICE SOFTWARE PRODUCT SEARCH	ORDER SEARCH	ACCOUNT INFO	CONTACT US	HELP	SIGN OUT
HOME > ACCOUNT INFO > DEALER POSITIONS		MANAGE USER			
		MANAGE SUBSCRIPTION DEALER POSITIONS MANAGE THIRD PARTY ACCOUNT	anage Dealer Positions		Shopping Cart

Step 2: Search for a Dealer Position

- 1. A list of Dealer Positions for your dealership will appear.
 - a. Headings are sortable
- 2. You may change the number of Dealer Positions displayed to 25, 50, or ALL.



- 3. You may enter specific search criteria for each radio button such as:
 - a. Company Name
 - b. Dealer Position
 - c. Attention Name

Dealer Positions				
Search dealer positions by Company OR Dealer Position OR Attention Name				
Company Dealer Position Attention Name				
Company Name Search Clear				

Step 3: Edit an Existing Dealer Position

- 1. Find the Dealer Position you want to Edit.
- 2. Select the "Edit" link on the right side of the page.
- 3. Make changes to Company Name, Attention, Address, or any other text fields.
- 4. Select the "Save" button.

Dealer Po	sitions										
Search dealer pos	Search dealer positions by Company OR Dealer Position OR Attention Name										
Company	Company										
O Dealer Positi	O Dealer Position										
Attention Na	O Attention Name										
	Search Clear										
Show 25 🔻 R	ecords Export to Excel										
		Column/Data	can be sorted by clicking the c	olumn head	ngs.						
Dealer Position	Company Name	Attention Name	Address1	Address2	City	State	Postal Code	Country	Phone	Status	6
Dealer Code - Position Number	Company Name	Name	Street Address		City	State	Zip Code	Country	Phone #	Active	<u>Edit</u>

Add Edit Dealer Position			
Fields marked with an asterisk (*) are required.			
* Dealer	Dealer Code & Dealer Name		
Dealer Position	Dealer Code - Position #		
* Company	Company		
* Attention	Attention Name		
*Address 1	Street Address		
Address 2			
Address 3			
Address 4			
* City	City		
* Country	Country		
State/Province	State		
* Postal Code	Zip Code		
* Phone	Phone #		
Extension			
Fax			
Status	 Active Inactive 		
Save	ncel		

Step 4: Create a New Dealer Position

1. Select the "Add New Dealer Position" link at the bottom of the page.

Add New Dealer Position

- 2. Select the appropriate Dealer Code/Name associated to this address.
 - a. This will automatically create the Dealer Position (non-editable).
- 3. Fill in the address information & select the "Save" button.

Add Edit Dealer Position			
Fields marked v	vith an asterisk (*) are required.		
* Dealer	Dealer Code & Dealer Name		
Dealer Position	Dealer Code - Position #		
* Company	Company		
* Attention	Attention Name		
*Address 1	Street Address		
Address 2			
Address 3			
Address 4			
* City	City		
* Country	Country		
State/Province	State		
* Postal Code	Zip Code		
* Phone	Phone #		
Extension			
Fax			
Status	Active Inactive		
Save Ca	ncel		

Step 5: Export the User List

- 1. Select the "Export to Excel" button.
- 2. Once the file is created, click to open the file in MS Excel.

Dealer Positions			
Search dealer positions by Company OR Dealer Position OR Attention Name			
Company			
O Dealer Position			
Attention Name			
Search Clear			
Show 25 Records Export to Excel			
SISUsers.xls			

Contact Us

If you need assistance or have any questions, please contact the TIAS Inbox:

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