

Admin Tools

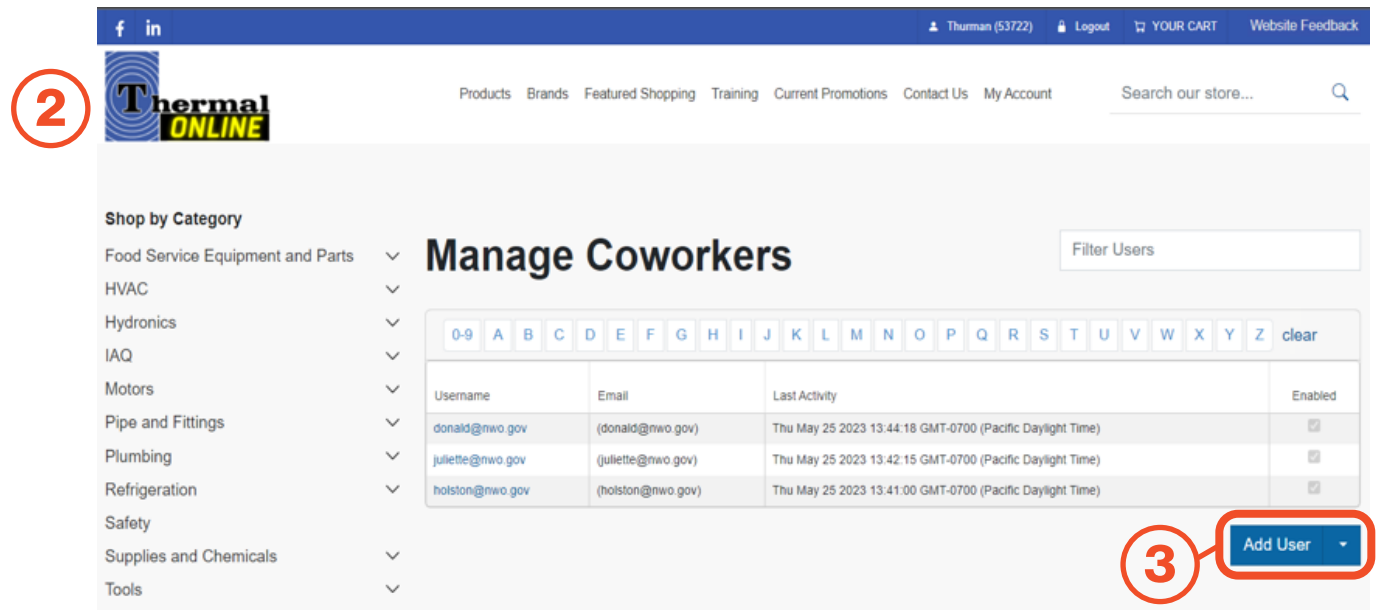
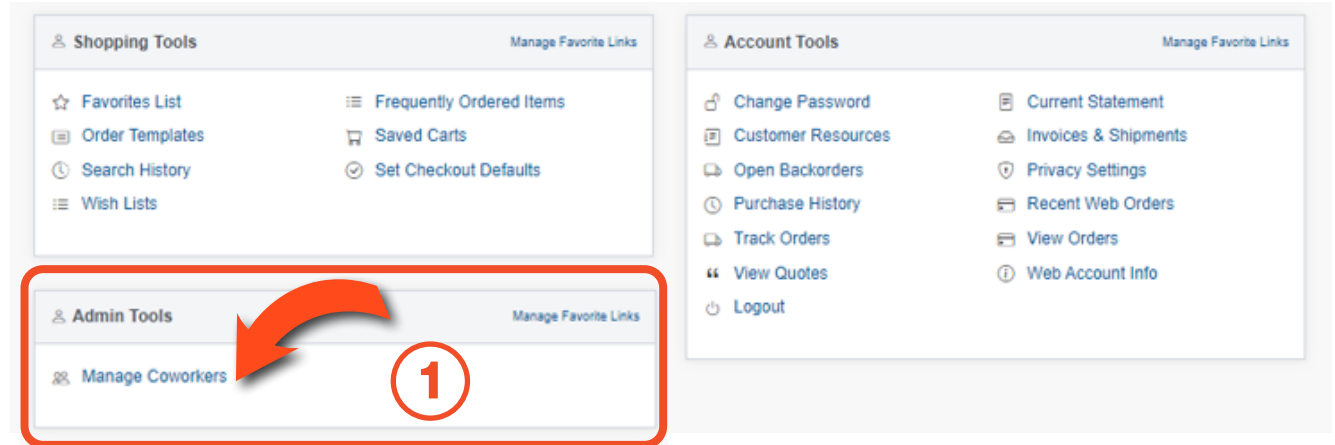
Manage Coworkers

The “Manage Coworkers”
Tool allows an admin to
manage all the accounts
within a company.

Admin Tools

Manage Coworkers

- 1 | If you have the tool enabled on your account click on **“Manage Coworkers”** to access the tool located within the account dashboard
- 2 | On the next screen you’ll be able to view and manage any user that shares your account number - To make edits click on the username
- 3 | Click on **“Add User”** to generate a new profile for those that need a webstore login within your company



Notes:

This feature will only be available to admin profiles that have the tool enabled. Based on your company’s needs, there can be more than one admin account with the ability to manage coworkers. Please contact dlewis@thermalsupply.com if you need assistance.

Admin Tools

Manage Coworkers

Clicking on **“Add User”** will provide you with two options to create a new login:

1 | Existing Contact

If the new coworker has an existing contact in Thermal Supply’s system, you can use the **“Add User Wizard”** - Relevant contact information from Thermal Supply’s database will be filled out for you

OR

2 | Manually

a. You can select **“Manually Create User”** to enter all the new coworker’s information - Choose a username and password for the new login and fill out their contact info

b. On the next tab, **Misc User Fields**, select your closest Thermal Supply branch. If you have a current Thermal Supply sales rep you can enter their name here as well

1

New User Wizard

Create a new website user based on contact information from the records of Thermal Supply, Inc.
If the contact information isn't found you can create a new user manually.

Begin Wizard

New User Wizard

- Search/New
- User Info
- Account Info
- Review
- Complete

Contact Search/User Email

Email Address

Search

+ New User

2

Manage Coworker

User Info Misc User Fields Security & Access Online Spending Limits

User Name: scott@meo.gov
Password: [input]
Re-enter Password: [input]
User's Name (first/last): Scotty
Phone: 555
Extension: [input]
User Email: scott@meo.gov
Re-enter Email: [input]

Address 1: [input]
Address 2: [input]
City: [input]
State: [input]
Zip Code: [input]
Country (3 letter code): US
Time Zone: (UTC-08:00) Pacific Time (US & Ca)

Default Location: Seattle
Shipping Address Type: Commercial

Save

b

Manage Coworker

User Info Misc User Fields Security & Access Online Spending Limits

Default Store

Sales Rep (if Known)

Save

Back to Manage Coworkers

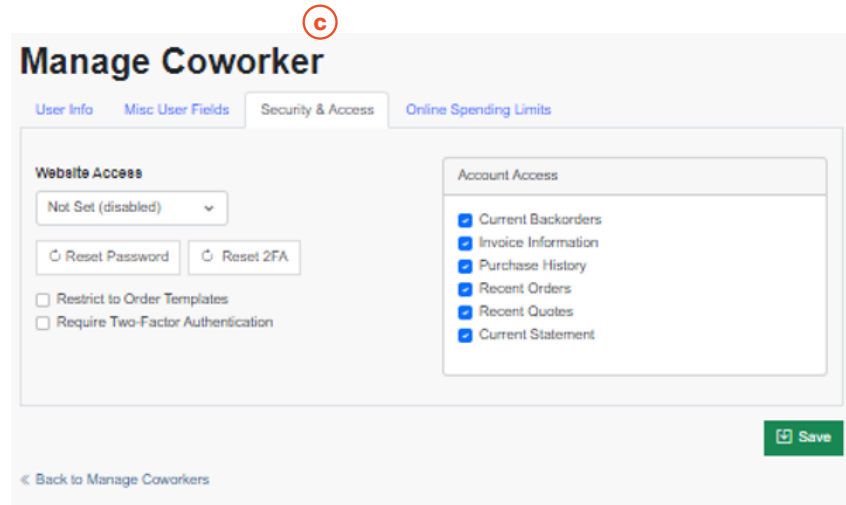
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Manage Coworkers

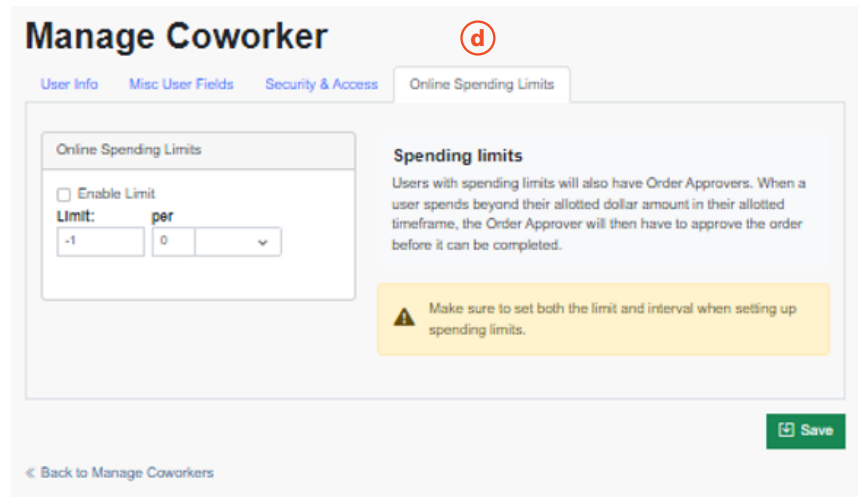
c. The third tab allows you to enable/disable the coworker's account and restrict them to ordering only from Order Templates. You can also determine which areas of the account dashboard are available to them

d. The fourth tab allows you to set spending limits for users - Any time an order is placed that is over the given limit, the order will need to be approved by you before the order will be sent to Thermal Supply

All pending order approvals can be viewed on the account dashboard

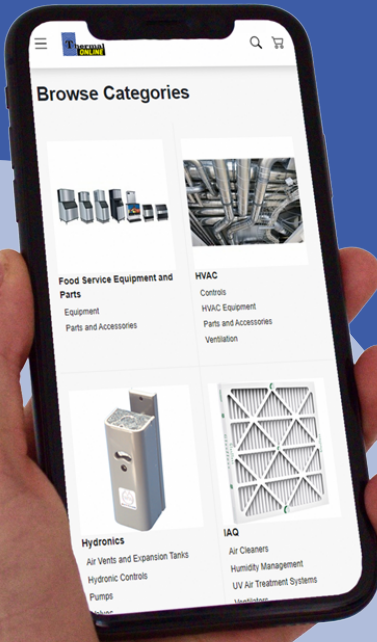


The screenshot shows the 'Manage Coworker' page with the 'Security & Access' tab selected. A red circle 'c' is positioned above the title. The page has four tabs: 'User Info', 'Misc User Fields', 'Security & Access', and 'Online Spending Limits'. The 'Webalta Access' section includes a dropdown menu set to 'Not Set (disabled)', 'Reset Password', and 'Reset 2FA' buttons, and two checkboxes: 'Restrict to Order Templates' and 'Require Two-Factor Authentication'. The 'Account Access' section contains a list of checkboxes for 'Current Backorders', 'Invoice Information', 'Purchase History', 'Recent Orders', 'Recent Quotes', and 'Current Statement'. A green 'Save' button is at the bottom right, and a 'Back to Manage Coworkers' link is at the bottom left.



The screenshot shows the 'Manage Coworker' page with the 'Online Spending Limits' tab selected. A red circle 'd' is positioned above the title. The page has four tabs: 'User Info', 'Misc User Fields', 'Security & Access', and 'Online Spending Limits'. The 'Online Spending Limits' section includes an 'Enable Limit' checkbox, a 'Limit:' label, a 'per' label, and two input fields with values '-1' and '0'. The 'Spending limits' section contains explanatory text: 'Users with spending limits will also have Order Approvers. When a user spends beyond their allotted dollar amount in their allotted timeframe, the Order Approver will then have to approve the order before it can be completed.' Below this is a yellow warning box with a triangle icon and the text: 'Make sure to set both the limit and interval when setting up spending limits.' A green 'Save' button is at the bottom right, and a 'Back to Manage Coworkers' link is at the bottom left.

Still Have Questions?



For additional questions, feedback, or to request a virtual tour of the website via Zoom or Microsoft Teams please reach out to our web team:

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