



# Verizon Partner Solutions Exchange Company & User Management Job Aid

## Things to Know

### User Management Functionality

- Administrator Dashboard
- Create User or Admin
- Modify User
- Password Reset
- Suspend/Restore User
- Delete User

## Getting Started

From the Hamburger menu

1. Choose Administration
2. Company & User Management



## Dashboard

From the Dashboard, view:

1. Users by Role (click the chart)
2. Company Profile
3. Pending and All Users (click Go to Full List)
4. Submitted requests or add a new user (click View all requests)

The dashboard displays the following information:

- User by Role:** A donut chart showing 198 total users, categorized by Billing, Ordering, Quoting, and Repair. A red circle '1' is placed over the chart.
- Company Profile:** Details for CLE Company, including address (600 HIDDEN RIDGE, Irving TX, USA) and Account Manager information (ManagerName: (222) 222-2222, testmail1@verizon.com). A red circle '2' is placed over the top right of this section, and a red circle '4' is placed over the bottom right.
- User Management:** A table listing users with columns for Name, User Type, Role, and Status. A red circle '3' is placed over the 'Go To Full List' link.
- Requests:** A table listing submitted requests with columns for Name, Email, Request Type, and Date Submitted. A red circle '4' is placed over the 'View all requests' link.

Name	User Type	Role	Status
Customer User	Customer User	Repair, Billing, Maps, Quoting	Active
Customer Admin	Customer Admin	Repair, Billing, Maps, Quoting	Active
Customer User	Customer User	Quoting, Ordering, Maps	Active
Customer Admin	Customer Admin	Ordering, Repair, Quoting, Maps, UserAdmin	Active
Customer Admin	Customer Admin	Quoting, Ordering, Repair, Billing, UserAdmin	Active

Name	Email	Request Type	Date Submitted
ATCABC1	CUST1@COMPANY.COM	App Request	11/05/2022
ATCABD1	CUST2@COMPANY.COM	App Request	11/05/2022
ATCABE1	CUST3@COMPANY.COM	App Request	11/05/2022
ATCABF1	CUST4@COMPANY.COM	App Request	11/05/2022
ATCABG1	CUST5@COMPANY.COM	App Request	11/05/2022



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## Create User | Admin

From the Administrative Dashboard, under **Requests** click:

1. View all requests
2. Add New User

**Requests** [View all requests](#)

Name	Email	Request Type	Date Submitted
ATCABC1	CUST1@COMPANY.COM	App Request	11/05/2022
ATCABD1	CUST2@COMPANY.COM	App Request	11/05/2022
ATCABE1	CUST3@COMPANY.COM	App Request	11/05/2022
ATCABG1	CUST5@COMPANY.COM	App Request	11/05/2022
ATCABF1	CUST6@COMPANY.COM	App Request	11/05/2022

Filter by: Request Type: All

Name	Phone	Email	Date Submitted	Request Type
ATCABF1	8005551212	CUST6@COMPANY.COM	11/05/2022	App Request

**Add New User**

### Create User Details

1. Enter First & Last Name
2. Add Email Address
3. Create an admin user by using the slider (Yes for Admin or No for basic user)
4. Add Role(s)
5. Click Send Link
6. Obtain user registration email and click the [Register Here](#) link within 24 Hrs.
7. Create User ID (email address cannot be used), Password and Secret question and answer

**Add New User**

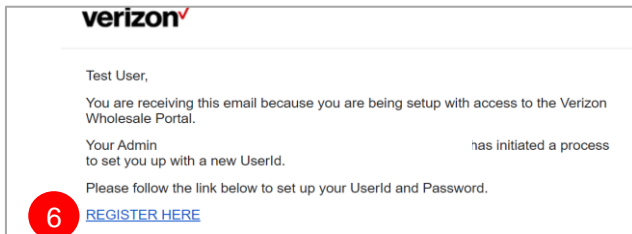
First Name  Last Name

Email

Admin  No

Role(s)

Quoting  Order  Repair  Billing  All  Project Management  Maps



User ID

Minimum 6 characters, can not be all numbers, no spaces allowed

First Name: **Test**  
Last Name: **User**  
Password

Enter Password

Password strength :

Minimum 8 characters, maximum 20 characters, at least 1 letter and 1 number, and is case sensitive. Cannot match User ID, cannot be an easily guessed password, and cannot have spaces.

Confirm password

Re-enter password

Secret question

Select a question

Answer

Enter your secret answer

Minimum 3 characters, maximum 40 characters, the only special character allowed is a period.

### Note:

Review the User ID activation email (User ID and login link to the Verizon Partner Solutions Exchange portal)

Login to the [Verizon Partner Solutions Exchange](#) portal with new User ID and Password



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## Modify User

From the User Management section of the Dashboard

1. Select Go to Full List
2. Click All Users
3. Use Worklist (or search bar) to determine which User ID to modify
4. Click the Action button

**User Management** 1 [Go To Full List](#)

Name	User Type	Role	Status
Cust One	Customer User	Repair, Billing, Maps, Quoting	Active
Cust Two	Customer Admin	Ordering, Repair, Quoting, Maps, UserAdmin	Active
Cust Three	Customer User	Quoting, Ordering, Maps	Active
Cust Four	Customer Admin	Ordering, Repair, Quoting, Maps, UserAdmin	Active

Pending Users | **All Users** 2

Search User 3

Filter by: Status - All Role - All Apply Download Full List

First Name	Last Name	User ID	User Type	Roles	Status	Action
2Test	User	2TestUser	Customer Admin	Quoting, Maps, UserAdmin	Active	
4Test	User	4Tester	Customer Admin	Quoting, Ordering, Repair, Maps, Billing, UserAdmin	Active	<span style="float: right;">4</span>

3

Modify any of the following fields:

1. Admin: Yes | No
2. Role(s)

Click **Update**

**2Test User** 1

User ID: 2TestUser

Admin:  Yes 2

Role(s): **Quoting** Order Repair Billing All Project Management Maps

Active  Suspend User  Reset Password

Contact Information

Email  
Work Phone  
Call Phone 1234567890  
Address  
Zip Code

Delete User Update

## Suspend User

Select one of the following actions:

1. Suspend User
2. Click to Suspend User

**Edit User**

**CertTestFFPrd**  
CertTestLPrd

User ID: CertTestFFPrd

Admin:  No

Role(s): **Quoting** Order Repair Billing All Project Management Maps

1  Active  **Suspend User**  Reset Password

**Suspend User**

User will not be able to login to the vps platform until re-activation

Cancel 2 **Suspend**

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## Reset Password

From the User Management section of the Dashboard

1. Select Go to Full List
2. Click All Users
3. Use Worklist (or search bar) to determine which User ID requires a password reset
4. Click the Action Button

**User Management** 1 [Go To Full List](#)

Name ↑	User Type ↑	Role	Status ↑
Cust One	Customer User	Repair , Billing , Maps , Quoting	<span style="color: green;">●</span> Active
Cust Two	Customer Admin	Ordering , Repair , Quoting , Maps , UserAdmin	<span style="color: green;">●</span> Active
Cust Three	Customer User	Quoting , Ordering , Maps	<span style="color: green;">●</span> Active
Cust Four	Customer Admin	Ordering , Repair , Quoting , Maps , UserAdmin	<span style="color: green;">●</span> Active

Pending Users | **All Users** 2

Search User 3

Filter by: Status - All  Role - All  **Apply** Download Full List

First Name ↑	Last Name ↑	User ID ↑	User Type ↑	Roles	Status ↑	Action
2Test	User	2TestUser	Customer Admin	Quoting , Maps , UserAdmin	<span style="color: green;">●</span> Active	
4Test	User	4Tester	Customer Admin	Quoting , Ordering , Repair , Maps , Billing , UserAdmin	<span style="color: green;">●</span> Active	<span style="float: right;">4</span>

Select one of the following actions:

1. Reset Password
2. Send Password reset link to user (via email)

**Edit User**

CertTestFPrd  
CertTestLPrd  
User ID: CertTestFPrd  
● Active

Admin  No

Role(s)

**Quoting** Order Repair Billing All Project Management Maps

**Reset Password**

Are you sure you want to send a link to the user for resetting password?

2

1

## Delete User

Select one of the following actions:

1. Delete User
2. Click Delete

**2Test User**  
User ID: 2TestUser  
● Active

Admin  Yes

Role(s)

**Quoting** Order Repair Billing All Project Management Maps

**Delete User**

This action is permanent and cannot be undone.

2

1