



Appendix 4 to the ACD RMA Portal User Management

Version: 1.00



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1 Overview

The "User interface" button in the menu bar takes you to the overview.

The screenshot shows the top navigation bar with the following items: ACD RMA Portal, DASHBOARD, ADD PROCESS, MY PROCESSES, USER ADMINISTRATION (highlighted in orange), HELP, Andrew Samplename, and EN. Below the navigation bar, the page title is "User management". There is a search bar with the placeholder text "Search for names, numbers, companies, data etc...". To the right of the search bar is a button labeled "Add subuser" with a plus icon and a person icon. Below the search bar, there is a list of users. The first user is "ACDUS (Andrew Samplename)". To the right of this user entry is a "DETAILS" panel. The details panel contains the following information: "User name: SampleUser" with a green "Active" status icon; "Name: Andrew Samplename"; "ACDUS" address: "Sample Street 2, Illinois, IL 88480, United States"; "E-mail: andreas.geiger@acd-elektronik.de"; "Account number: D10000, C10000"; "No. of Processes: 2"; and a link "View processes".

2 Editing User Settings

Click "..." to open user management

This screenshot is identical to the one above, but with a black arrow pointing from the right towards the three-dot menu icon of the "ACDUS (Andrew Samplename)" user entry. A small white tooltip box labeled "Edit user" is positioned directly below the three-dot icon, indicating the action that can be performed by clicking it.



2.1 Settings

The user management window opens
The address data can be adjusted on the "Settings" tab

USER ADMINISTRATION ✕

Settings ADDRESS BOOK NOTIFICATIONS API KEYS PASSWORD

User name *

Title

First name

Company *

Zip code *

Country *

Phone

E-mail *

Surname *

Street *

City *

State *

Language

Account number

ACD Elektronik
 Default

ACD Systemtechnik
 Default

ACD USA
 Default

If you do not know your customer number, please do not hesitate to call +49 7392 708-499.



2.2 Address book

2.2.1 Default setting

One or more differing delivery addresses and billing addresses can be managed in this view. If an address is created here, it can be selected when creating the RMA.

USER ADMINISTRATION ×

Settings **ADDRESS BOOK** NOTIFICATIONS API KEYS PASSWORD

Invoice Address

No additional addresses are available.

New address

Shipping Address

No additional addresses are available.

New address

Cancel Save data



2.2.2 Differing delivery addresses

2.2.2.1 Creating new addresses

Press the "New address" button to open the input window

After the address and postal address have been entered the data can be saved here.

A different address can be set by checking "Use as default address." Then that address will be preassigned when the RMA is created.

USER ADMINISTRATION ×

Settings **ADDRESS BOOK** NOTIFICATIONS API KEYS PASSWORD

Invoice Address

Title	<input type="text" value="Mr."/>	<input type="button" value="Cancel"/>	
First name	<input type="text" value="Ralf"/>	Surname	<input type="text" value="Samplename"/>
Company *	<input type="text" value="ACDElektronik"/>	Street *	<input type="text" value="Engelstreet2"/>
Zip code *	<input type="text" value="88480"/>	City *	<input type="text" value="Achstetten"/>
Country *	<input type="text" value="Germany"/>	State *	<input type="text"/>
E-mail	<input type="text"/>	Phone	<input type="text"/>
<input checked="" type="checkbox"/> Use as default address			

Shipping Address

No additional addresses are available.



2.2.2.2 Editing and deleting differing delivery addresses

After the data is saved, the addresses can be accessed again in the Addresses tab and changed there. You can click on "... " to adjust the addresses.

USER ADMINISTRATION

Settings ADDRESS BOOK NOTIFICATIONS API KEYS PASSWORD

Invoice Address

Default address

Mr. Ralf Samplename, ACDElektronik, Engelstreet2, 88480 Achstetten, Germany

Mr. Ralf Samplename
ACDElektronik
Engelstreet2
88480 Achstetten
Germany

... Edit address
Delete address

New address

You can preselect your preferred default address in the "Standard address" menu

USER ADMINISTRATION

Settings ADDRESS BOOK NOTIFICATIONS API KEYS PASSWORD

Invoice Address

Default address

Mr. Ralf Samplename, ACDElektronik, Engelstreet2, 88480 Achstetten, Germany

Mr. Andrew Samplename, ACDUS, Sample Street 2, Illinois, IL 88480, United States

Mr. Ralf Samplename, ACDElektronik, Engelstreet2, 88480 Achstetten, Germany

Engelstreet2
88480 Achstetten
Germany

New address



2.2.3 Differing billing addresses

Similarly to 2.2.2 "Differing delivery addresses," differing billing addresses can also be created and managed.

2.3 Notifications

In the notification settings you can define the status change of your order for which you want to receive an email from the RMA portal.

In the "Additional email addresses" field you can save additional email addresses differing from the email address stored in the user account.


USER ADMINISTRATION ✕

Settings ADDRESS BOOK **NOTIFICATIONS** API KEYS PASSWORD

Notifications

- Created
- Received
- In progress
- Cost estimation
- Waiting for release
- Processed
- Shipped
- Completed

You can receive notifications by email for status changes to your RMA processes. You will receive notifications for all checked statuses.

Additional email addresses for notifications 

Separate multiple addresses with semicolons



2.4 API key

You can apply for an external access key for connecting to our portal here. Please contact our support if you want to use this option.

USER ADMINISTRATION ×

Settings ADDRESS BOOK NOTIFICATIONS **API KEYS** PASSWORD

API Keys

These API keys allow access to the RMA portal with your account's permissions. If a token has been compromised or is no longer used, it can be deleted here to disable access.

The use of these keys can be restricted to a list of known IP addresses. Enter the addresses or networks here in CIDR or "dotted quad" notation (e.g. 127.0.0.1 or 192.168.0.0/16)

Your current IP address: 89.245.47.19

Token	IP Whitelist
You currently have no API keys set up	

[Generate new API key](#) [Cancel](#) [Save data](#)



2.5 Password

A new password for the user can be set here.

USER ADMINISTRATION ×

Settings ADDRESS BOOK NOTIFICATIONS API KEYS **PASSWORD**

Password

Current password *

Enter your current password here in order to change your password or email address.

New password *

New password (confirmation) *

Cancel Save data



3 Creating New Sub-Users

You can click on the button "Create Sub-Users" to generate further hierarchically descending sub-users.

The hierarchy level or hierarchy overview is illustrated below with an imaginary example:

User creation:

- 1. Global IT
 - 1.1. Countries IT
 - 1.1.1 Warehouse 1.1
 - 1.2 Country management
 - 1.2.1 Warehouse 1.2

Permissions:

- 1. Global IT
 - All orders visible
 - 1.1. Countries IT
 - Orders from Countries IT and from 1.1.1 Warehouse 1.1 visible
 - 1.1.1 Warehouse 1.1
 - Only orders from 1.1.1 Warehouse 1.1 visible
 - 1.2 Country management
 - Orders from Country management and from 1.2.1 Warehouse 1.2 visible
 - 1.2.1 Warehouse 1
 - Only orders from 1.2.1 Warehouse 1.2 visible



3.1 Creating the new sub-user

The window shown below opens. After clicking on "Create user" the sub-user receives an email to activate the account.

ADD USER X

Please fill in the following form. Fields marked with * are mandatory fields.

User name * <input type="text" value="ClaudiaSamplename"/>	
Title <input <span="" type="text" value="Mrs."/> ▼	E-mail * <input type="text" value="claudia.s@acd-elektronik.de"/>
First name <input type="text" value="Claudia"/>	Surname * <input type="text" value="Samplename"/>
Company * <input type="text" value="ACDPermission1"/>	Street * <input type="text" value="Engelstreet2"/>
Zip code * <input type="text" value="88480"/>	City * <input type="text" value="Achstetten"/>
Country * <input <span="" type="text" value="Germany"/> ▼	State * <input <span="" type="text" value=""/> ▼
Phone <input type="text" value="098704330505438"/>	Language <input <span="" type="text" value="English"/> ▼
Additional email addresses for notifications <input type="text"/>	Subuser assigned to <input <span="" type="text" value="ACDUS (Andrew Samplename)"/> ▼

Separate multiple addresses with semicolons

Permission to create subusers	<input checked="" type="radio"/> Yes <input type="radio"/> No
Can see and approve cost estimates	<input checked="" type="radio"/> Yes <input type="radio"/> No
Can request shipping	<input checked="" type="radio"/> Yes <input type="radio"/> No
Can request pickup	<input type="radio"/> Yes <input checked="" type="radio"/> No
Responsible persons are visible	<input checked="" type="radio"/> Yes <input type="radio"/> No

Account number

ACD Elektronik <input type="text" value="D10000"/>	<input checked="" type="radio"/> Default
ACD Systemtechnik <input type="text"/>	<input type="radio"/> Default
ACD USA <input type="text"/>	<input type="radio"/> Default

If you do not know your customer number, please do not hesitate to call +49 7392 708-499.



3.1.1 Managing permissions

You can pass on the permissions you have in your account.

It is possible you do not have all permissions. If so, not all the options listed below will be presented. If you have any questions please contact our support.

Permission to create subusers	<input type="radio"/> Yes	<input type="radio"/> No
Can see and approve cost estimates	<input type="radio"/> Yes	<input type="radio"/> No
Can request shipping	<input type="radio"/> Yes	<input type="radio"/> No
Can request pickup	<input type="radio"/> Yes	<input type="radio"/> No
Responsible persons are visible	<input type="radio"/> Yes	<input type="radio"/> No

3.1.1.1 Permission to create subusers

The sub-user may create additional users.

3.1.1.2 Can see and approve cost estimates

The sub-user may view and approve cost estimates.

3.1.1.3 Can request shipping

The sub-user may use the UPS shipping tool integrated in the RMA portal. For details, please refer to the ACD RMA UPS Portal manual.

3.1.1.4 Can request pickup

The sub-user may use the shipping tool integrated into the RMA portal with UPS pick-up service. For details, please refer to the ACD RMA UPS Portal manual.

3.1.1.5 Responsible persons are visible

The sub-user sees the contact person when the order is created.

3.1.1.6 New order available

The sub-user may place new orders via the portal when the cost estimate is released.



3.2 Managing the sub-user

After the browser is updated, the new sub-user is displayed.

Green: User is active

Orange: User is not confirmed yet

Gray: User is deactivated

DETAILS	
User name:	SampleUser Active
Name:	Andrew Samplename

3.2.1 Managing sub-users

The portal provides its own account management. The "..." button of the sub-user can be used to adjust the user data, reset the password or lock the user

ACD RMA Portal | DASHBOARD | ADD PROCESS | MY PROCESSES | **USER ADMINISTRATION** | HELP | Andrew Samplename | EN

User management

Search for names, numbers, companies, data etc....

+ Add subuser

DETAILS	
User name:	ClaudiaSamplename Active
Name:	Claudia Samplename
ACDPermission1	Engelstreet2 88480 Achstetten Germany
Phone:	098704350509458
E-mail:	andreas.geiger@acd-elektronik.de
Account number:	D10000
No. of Processes:	0