

Disty Managed Partner Site Admin

Reference Guide

Dell Technologies Federal Training

DELLTechnologies

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Questions? Please reach out to the following address:



Fed_Partner_Deal_Reg@federal.dell.com

Legend:



Additional Information




Best Practice

Create a New User

Create a New User

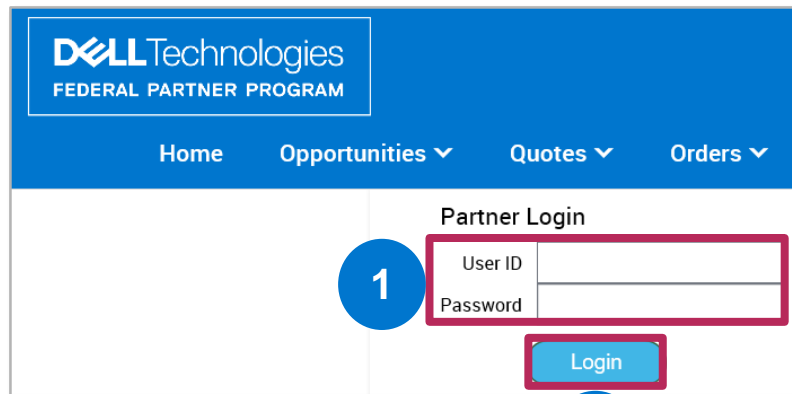
As a Disty Managed Partner Site Admin, you have the ability to onboard members of your organization as Site Admins or Sales Reps. Site Admins have the ability to add additional users.

Follow the steps below to search for an existing user:

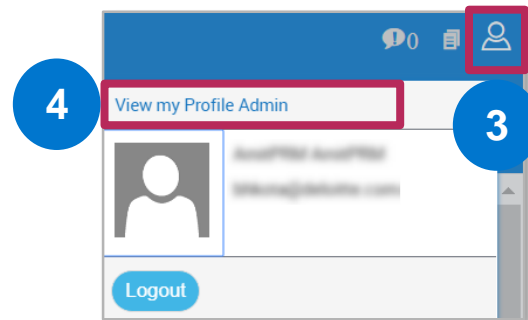
1. Enter the **User ID** and **Password** to log in to Federal Partner Relationship Management.
2. Click **Login** and complete the Multi Factor Authentication (MFA) login process.
3. Click the Settings icon  on the top right corner of the landing page.
4. Click **View my Profile Admin** to view the **Users** list view. All the contacts associated with your account are listed on the **Users** list view.



Note: Users that are onboarded to Fed PRM should be US citizens.



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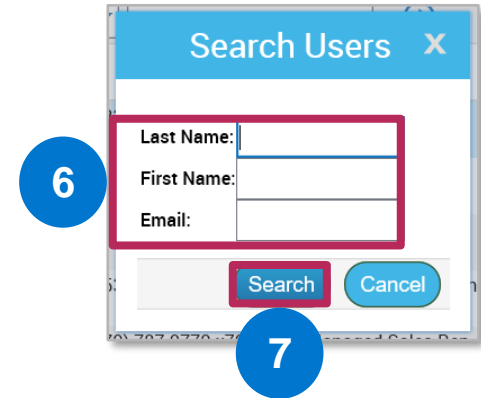
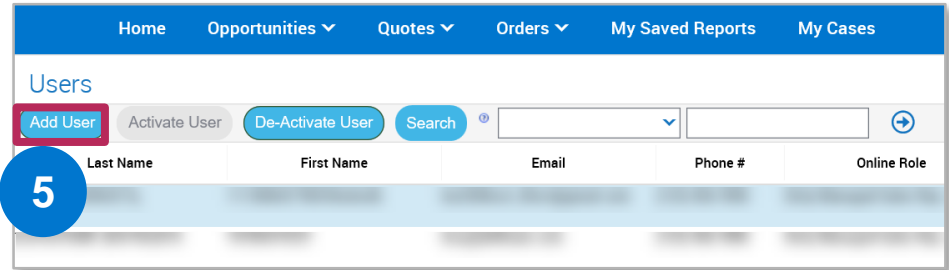


3

4

Create a New User (Cont'd)

5. Click **Add User**. Upon clicking **Add User**, the **Search Users** pop-up window appears.
6. Enter the **Last Name**, **First Name** and/or **Email** address to search for an existing user.
7. Click **Search**.



Create a New User (Cont'd)

8. If the user for whom you are searching is available, click **Save**.

Add Users X

* First Name, Last Name, Email Address, Phone # and Online Role are mandatory. Additional fields may be required based on Online Role selected.

Create New User

Last Name	First Name	Email Address	Phone #	Online Role	Account
				Disty Managed Site Admin	
				Disty Managed Site Admin	

« « » »

8 Save Search User Cancel



Note: If the search does not generate the user contact for whom you are searching, follow the steps in the next slides to create a new user.

Create a New User (Cont'd)

If the user for whom you are searching is not available, follow the steps below.

1. Click **Create New User**.
2. Enter the **Last Name**, **First Name**, **Email Address**, and **Phone #**, all of which are mandatory fields.
3. Select the **Online Role** from the drop-down, which is a mandatory field.

The screenshot shows the 'Add Users' form with a blue header and a close button (X). Below the header is a note: '* First Name, Last Name, Email Address, Phone # and Online Role are mandatory. Additional fields may be required based on Online Role selected.' Below this is a 'Create New User' button highlighted with a red box and a blue circle containing the number 1. The form has a table with columns: Last Name, First Name, Email Address, Phone #, Online Role, and Account. A red box highlights the input fields for Last Name, First Name, Email Address, and Phone #. Below the table are navigation arrows and buttons for Save, Search User, and Cancel.

The screenshot shows the 'Add Users' form with a blue header and a close button (X). Below the header is a note: '* First Name, Last Name, Email Address, Phone # and Online Role are mandatory. Additional fields may be required based on Online Role selected.' Below this is a 'Create New User' button. The form has a table with columns: Last Name, First Name, Email Address, Phone #, Online Role, and Account. The 'Online Role' dropdown menu is open, showing two options: 'Disty Managed Site Admin' and 'Disty Managed Sales Rep', both highlighted with a red box and a blue circle containing the number 3. Below the table are navigation arrows and buttons for Save, Search User, and Cancel.

Create a New User (Cont'd)

4. Click **Save**.



The **Account** field is read-only on the **Add Users** screen. Upon clicking **Save**, the **Reseller Account** field of the new Disty Managed Partner user is automatically populated with your **Account**.



Upon clicking **Save**, the new user is added as the first user contact on the **Users** screen.

Add Users

* First Name, Last Name, Email Address, Phone # and Online Role are mandatory. Additional fields may be required based on Online Role selected.

Create New User 1 - 1 of 1

Last Name	First Name	Email Address	Phone #	Online Role	Account
				<input type="text" value=""/>	

Disty Managed Site Admin
Disty Managed Sales Rep

4 Save Search User Cancel

Home Opportunities Quotes Orders My Saved Reports My Cases

Users

Add User Activate User De-Activate User Search

Last Name	First Name	Email	Phone #	Online Role

Activate a User

Activate a User

Follow the steps bellow to activate a user to access Federal Partner Relationship Management:

1. Select the user on the **Users** list view, ensuring the row of the user is highlighted.
2. Review **Last Name**, **First Name**, **Email**, **Phone #**, and **Online Role** fields and update if necessary.
3. Click **Activate User**. Upon clicking **Activate User**, the **User ID** is auto-populated, the **PRM Access** flag is automatically enabled, and a user receives an email to set up their online credentials.

Last Name	First Name	Email	Phone #	Online Role	User ID	Reseller	Reseller Account	PRM Access
				Disty Managed Sales Rep		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
				Disty Managed Site Admin		<input checked="" type="checkbox"/>		
				Disty Managed Site Admin		<input checked="" type="checkbox"/>		




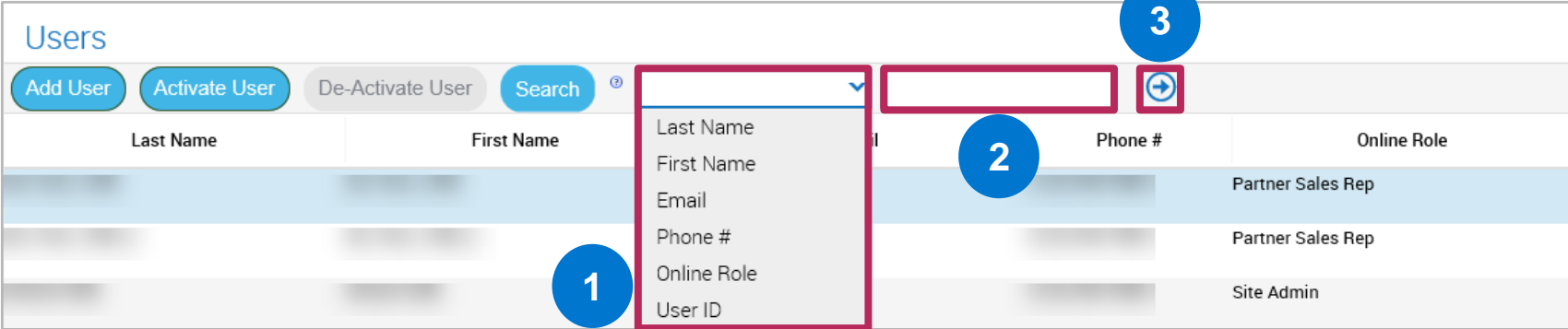
A populated User ID and enabled PRM Access flag indicates the user is already activated. In this instance, the user record is read-only. If you try to add the user again, the system will display a message stating the user is already activated.

Deactivate a User

Deactivate a User

Follow the steps below to deactivate a user from Federal Partner Relationship Management:

1. From the **Users** list view, select the parameter from the drop-down based on how you want to search for the user.
2. Based on the parameter selected, enter your search in the open text search field.
3. Click  to view search results.

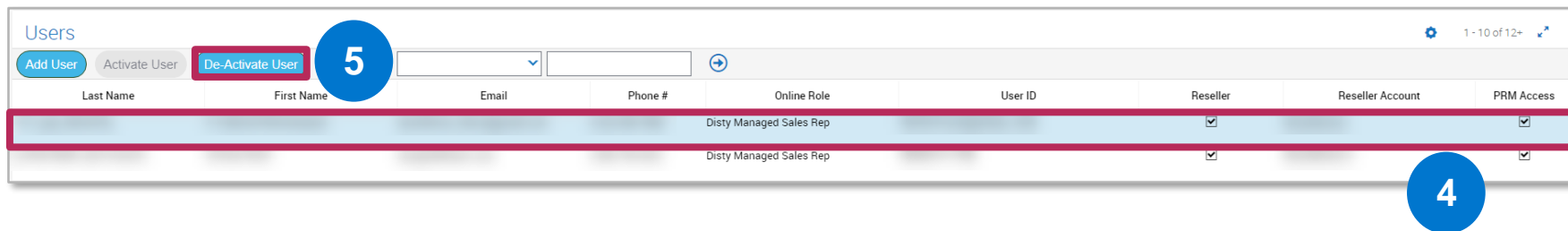


The screenshot displays the 'Users' management interface. At the top, there are buttons for 'Add User', 'Activate User', 'De-Activate User', and 'Search'. A search bar is present, with a dropdown menu open below it. The dropdown menu lists search criteria: Last Name, First Name, Email, Phone #, Online Role, and User ID. A red box highlights the dropdown menu, and a blue circle with the number '1' is placed next to it. To the right of the dropdown is a text input field for the search term, also highlighted with a red box and a blue circle with the number '2'. To the right of the input field is a search icon (a magnifying glass with a right-pointing arrow), highlighted with a red box and a blue circle with the number '3'. Below the search bar is a table with columns for 'Last Name', 'First Name', 'Phone #', and 'Online Role'. The table contains three rows of user data, with the first two rows having 'Partner Sales Rep' as their online role and the third row having 'Site Admin'.


Last Name	First Name	Phone #	Online Role
			Partner Sales Rep
			Partner Sales Rep
			Site Admin

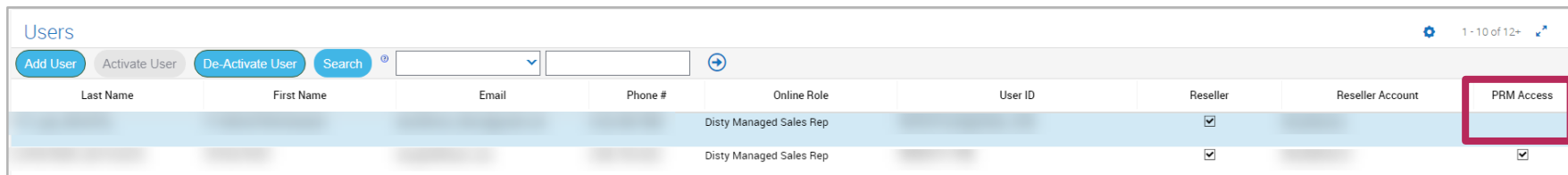
Deactivate a User (Cont'd)

4. Select the User Account on the **Users** list view.
5. Click **Deactivate User**. Upon clicking **Deactivate User**, the system shows a notification stating that the User is successfully deactivated.




The screenshot shows the 'Users' list view. At the top, there are buttons for 'Add User', 'Activate User', and 'De-Activate User'. The 'De-Activate User' button is highlighted with a red box, and a blue circle with the number '5' is overlaid on it. Below the buttons is a search bar and a table with columns: Last Name, First Name, Email, Phone #, Online Role, User ID, Reseller, Reseller Account, and PRM Access. The first row of the table is highlighted in blue, and a blue circle with the number '4' is positioned to its right.

 The **PRM Access** flag of the User Account is disabled upon deactivation.



The screenshot shows the 'Users' list view. At the top, there are buttons for 'Add User', 'Activate User', 'De-Activate User', and 'Search'. Below the buttons is a search bar and a table with columns: Last Name, First Name, Email, Phone #, Online Role, User ID, Reseller, Reseller Account, and PRM Access. The first row of the table is highlighted in blue, and the 'PRM Access' column is highlighted with a red box.

 *A user can be deactivated only if already activated. If the User ID is populated and the PRM Access flag is enabled for the user, it indicates the user is activated.*

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