

Adding a Dealer

In Manitou, a **Dealer** entity serves as a critical tool for managing and organizing accounts, particularly when those accounts are handled by an external installing or servicing company, or when they represent a specific subdivision of accounts within the company's operations.

The Dealer entity allows for detailed management and reporting by grouping accounts under a specific dealer, enabling the monitoring company to track performance, manage service requests, and generate dealer-specific reports. This structure not only enhances operational efficiency but also provides clear accountability, ensuring that each dealer or subdivision can be monitored for service quality and responsiveness, ultimately improving customer satisfaction and operational oversight.

Adding a Dealer

Dealer - Add

ID
This field is required

Name
This field is required

Type
Dealer ▼

A/R Company
<None> ▼

A/R Number 🔍

Country
United States of America ▼

Language
USENG - English (United States) ▼

Time Zone
GMT-05:00 - Eastern Time (US & Canada) ▼

CANCEL DONE

1. Click the Hamburger Icon (☰), then **File, New, and Dealer**.
2. **Enter the Dealer ID** - This ID has a maximum length of 32 characters. See your organization's standards for your ID requirements. Some examples are DLR0001, AMAZINGALRMS, and the like.
3. **Enter the Dealer Name**.
4. Type defaults to **Dealer** - You can create Sub Dealers by linking to a Master after creating the Dealer.
5. If applicable, choose the **Accounting Company** and **Accounting ID**.
6. Verify the **Country, Language, and Time Zone**.
7. When all is entered as required, click **Done**.

This commits the Dealer to the database and loads the Dealer Record to the screen.

Details

Dealer ID EXAMPLEDEALER 2 ✕
Name Example Dealer --
Master Dealer
Use Master
Time Zone Eastern Time (US & Canada)
Country
Locale English (United States)
Type Dealer
Accounting Company
Accounting Number
Sub Affiliate ID
Monitoring Status Normal

Contacts

Dealer Options

- Enable NotifyMe
- Allow Customers/Customer Contacts to put jobs on test

Monitoring Group Monitoring Group 0

Third Party Billing

A/R Company

A/R ID

Time Format Dealer Options

Time Format Default

Email Address To Use