

Adding a Dealer

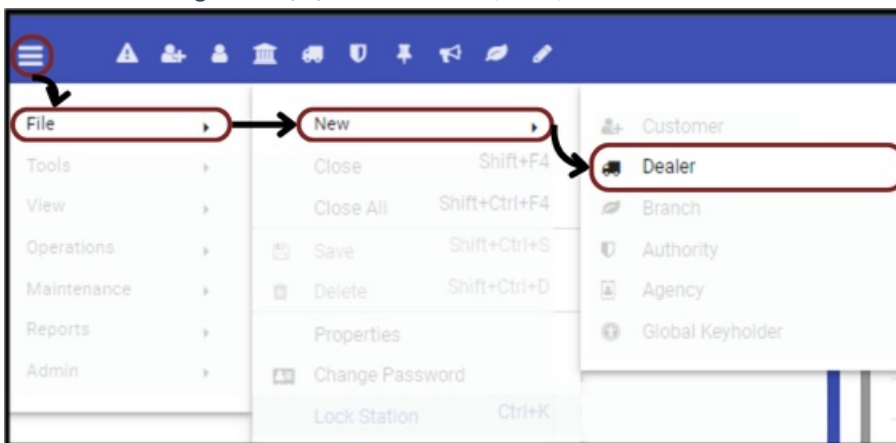
In Manitou, a **Dealer** entity serves as a critical tool for managing and organizing accounts, particularly when those accounts are handled by an external installing or servicing company, or when they represent a specific subdivision of accounts within the company's operations.

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 New Dealer

After collecting all pertinent information, log into Manitou and navigate to the New Dealer Creation form.

1. Click the hamburger icon (\equiv) then select **File**, **New**, and **Dealer**.



2. Enter the **Dealer ID**.
3. Enter the **Dealer Name**.
4. When applicable, select the **A/R Company** and select the **A/R number** for the Dealer.
5. Verify the **Country**, **Language**, and **Time zone** for the Dealer.
6. Click **Done**.

Dealer - Add

ID
This field is required

Name
This field is required

Type
Dealer ▼

A/R Company
<None> ▼

A/R Number Q

Country
United States of America ▼

Language
USENG - English (United States) ▼

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

CANCEL DONE

This adds the dealer to the Manitou Database and allows the update and creation of the details within the Dealer

<div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <p>Details ✎</p> </div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;">Dealer ID</td> <td>EXAMPLEDEALER Q 2 ✕</td> </tr> <tr> <td>Name</td> <td>Example Dealer ---</td> </tr> <tr> <td>Master Dealer</td> <td></td> </tr> <tr> <td>Use Master</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Time Zone</td> <td>Eastern Time (US & Canada)</td> </tr> <tr> <td>Country</td> <td></td> </tr> <tr> <td>Locale</td> <td>English (United States)</td> </tr> <tr> <td>Type</td> <td>Dealer</td> </tr> <tr> <td>Accounting Company</td> <td></td> </tr> <tr> <td>Accounting Number</td> <td></td> </tr> <tr> <td>Sub Affiliate ID</td> <td></td> </tr> <tr> <td>Monitoring Status</td> <td>Normal</td> </tr> </table>	Dealer ID	EXAMPLEDEALER Q 2 ✕	Name	Example Dealer ---	Master Dealer		Use Master	<input type="checkbox"/>	Time Zone	Eastern Time (US & Canada)	Country		Locale	English (United States)	Type	Dealer	Accounting Company		Accounting Number		Sub Affiliate ID		Monitoring Status	Normal	<div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <p>Contacts ✎</p> </div> <div style="padding: 5px;"> <p>Dealer Options ✎</p> <p><input type="checkbox"/> Enable NotifyMe</p> <p><input type="checkbox"/> Allow Customers/Customer Contacts to put jobs on test</p> <p>Monitoring Group Monitoring Group 0</p> <hr/> <p>Third Party Billing</p> <p>A/R Company</p> <p>A/R ID</p> <hr/> <p>Time Format Dealer Options</p> <p>Time Format Default</p> <p>Email Address To Use</p> </div>
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