Adding a New User to Your URC Dealer Portal Account

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The **URC Dealer Portal** is a fully transactional site that enables authorized URC dealers to place orders, view order tracking, check account status and is also an online destination for URC product information, dealer resources, marketing information, training registration and more. In some cases, you may need to add a **New User** when adding a new employee, a programmer, an installer or other company employees.

This article details Adding a New User to Your URC Dealer Portal Account .

If you need to add a new user to your **URC MCS/Offsite Programming** account and need to know the process, please see the article **Managing Your URC Dealer Offsite Programming** Account (www.urcmcs.com)

Please be aware that a *Dealer Admin account must first exist before new users can be added and that only t*he *Dealer Admin* can add new users to this dealer account. If you do not have a Dealer Admin account or are not sure if one exists, please contact URC via phone at 914-835-4484 or via Email to orderentry@urc-automation.com. You can also contact your Territory Account Manager.

Pro Tip: You will **only** be able to see *My Employee List* if you are the dealer account admin. Due to system changes over time, **some dealer accounts may not have an admin account activated**. If you need assistance, please contact your Territory Account Manager or URC at 914-835-4484.

Adding a New User to Your URC Dealer Portal Account

- 1. Log into your **Dealer Admin** portal account.
- 2. Under the account image icon, select **My Employee List** as shown below:

Resources 👻 Support 🕫	Sales CRM 🔻	Developer 🐨 🚨 🗤) I Q
		My Account	
		My Employee List	
		Pending Orders	
		Order History	
		Order Tracking	
		A/R Aging	
Email		Log Off	itus
Øgma	il com	05/04/2021	stive

3. After selecting My Employee List, the main window opens showing the currently registered employees and available options (as shown in the image below).

4. You will have the options to Add New, Open Excel Email List or Find Existing Employee.

Мy	Emp	loyee	List
		,	

	/ ceountes	User Name	Title	Email 🗘	Date 🗘	Status
Sales Dealer	01052	Ed Thomas		@gmail.com	05/04/2021	Active
Sales Dealer	01052	Ed Thomas		.com	08/05/2021	Active
Sales Training	01052	HUGH HART	Business Owner	@gmail.com	12/10/2019	Active
Sales Training	01052	John Smith	Programmer / Installer	Testing@urc.com	08/17/2020	Active
Sales Training	01052	Taylor Centers		@comcast.com	01/11/2021	Active

5. The options under My Employee List give you the ability to:

Add New: Add a new user.

Open Excel Email List: This option will allow you to generate a listing of all the current users and their Email addresses.

Find Existing Employee: This option will allow you to search for users currently registered to the dealer account.

Add New

To **add a new user**, please follow the steps listed below:

1. After accessing the dealer admin account as detailed above, select the **Add New** button at the bottom left of the My Employee List window.

My Employee List

Employee.Type	Account#	User Name	ି Titl	
Sales Dealer	01052	Ed Thomas		
Sales Dealer	01052	Ed Thomas		
Sales Training	01052	HUGH HART	Bus	
Sales Training	01052	John Smith	Prog	
Sales Training	01052	Taylor Centers		

Enter the new user info detail into the appropriate sections and select **Save**. List will revert back to the My Employee List main window (as shown in the image below):

ID#:	
G/P Account#:	01052
Company Name:	URC
First Name:	
Last Name:	
Job Title:	v
Email:	
Address 1:	*
Address 2:	
City:	*
State:	
Zip Code:	*
Account Type:	Sales_Dealer ~
Status:	Active 🗸
Ecommerce Block?	*if checked, the dealer cannot use e-commerce function.
Send Password:	

My Employee List - Detail

3. Under **Account Type**, select the desired account type:

Sales_TicketUser: This option allows a user to be added to a dealer account for the purpose of tracking any Technical Support correspondence with URC.

Sales_Other: Not used at this time

Sales_Dealer: This option allows a user to be added to a dealer account as a standard user allowing for access that is authorized by the dealer certification level.

Sales_Training: This option allows a user to be added to a dealer account for URC training purposes. This includes online, self-paced and other URC training options available on the URC dealer portal.

Account Type:	Sales_Dealer	~
Status:	Sales_TicketUser Sales_Other	
Ecommerce Block?	Sales_Dealer Sales_Training	se e-commerce function
Send Password:		

4. Under **Status**, you can make an individual user either *Active* or *Disabled*. This can be used to **disable** an employee access when required to both the portal as well as any software requiring permissions.



5. Under the section for "Ecommerce Block?", the dealer admin has the option to deny a user the ability to order products in the portal. If the box is checked, the user cannot use the e-commerce function.



6. Under the section for "Send Password", the dealer admin can activate the automated sending of the Login ID and the Temporary Password to the new user. The new user is prompted to change their password upon first login.

Please check the checkbox to send the Email.



When the password Email is sent, it looks similar to the image shown below:

Control the Experience.		
Dear URC DIRECT Dealer:		
URC is pleased to launch our new [Here is your login information:	Jealer Portal, designed exclusively for our U	JRC DIRECT Dealer network.
Website:	https://urcportal.com/Home/Login	
Login ID:	urc.test	
Temporary Password:	В	
This fully-transactional eCommerce	portal integrates with your existing URC ac	count, providing a quick and convenient way to place orders, view tracking and check your account status.
Use the portal to order URC Total C	ontrol®, MX HomePro™ and Complete Cor	ntrol™ products, accessories and parts - plus Vivido™ by URC and third-party products.
URC DIRECT will also serve as a va months.	aluable resource for the latest URC product	s, two-way modules, training sessions and announcements. Look out for more exciting features in the upcoming
For questions or concerns, please e	mail orderentry@universalremote.com	
Thank you, The URC Team		
This message contains confidential inform: you have received this email in error and d contain viruses. The sender therefore does Inc, Suite #502, 500 Mamaroneck Ave, Hai	tion and is intended only for the individual named. It elete this email from your system. Email transmissio i not accept liability for any errors or omissions in the trison, NY, USA, www.universalremote.com.	I you are not the named addressee you should not disseminate, distribute or copy this email. Please notify the sender immediately by email if n cannot be guaranteed to be secure or error free as information could be intercepted, corrupted, loat, destroyed, arrive late or incomplete, or contents of this message, which arise as a result of email transmission. If verification is required please request a hardcopy version. URC,

Open Excel Email List

To create a list of users and Email addresses, please follow the steps listed below:

1. After accessing the dealer admin account as detailed above, select the **Open Excel Email List** button at the bottom middle of the My Employee List window.

My Employee List

mpioyee.Type	Account#	User Name 🗘	Title	Email 🗘	Date 🗘	Status
Sales Dealer	01052	Ed Thomas		@gmail.com	05/04/2021	Active
Sales Dealer	01052	Ed Thomas		.com	08/05/2021	Active
Sales Training	01052	HUGH HART	Business Owner	@gmail.com	12/10/2019	Active
Sales Training	01052	John Smith	Programmer / Installer	Testing@urc.com	08/17/2020	Active
Sales Training	01052	Taylor Centers		@comcast.com	01/11/2021	Active

2. This option exports a listing of all users in Excel format. You can then download the report to your computer if desired and then open it from the downloaded files location.

⊲ ▷ C	D A Not sec	ure gp.urcportal.com:8090/rpt_report.aspx?i
Download Excel Report		
rpt_MyUserExcellist-08052021053644.xls		

Find Existing Employee

To Find (an) Existing Employee, please follow the steps listed below:

After accessing the dealer admin account as detailed above, select the **Find Existing Employee** button at the bottom right of the My Employee List window.

My Employee List

Employee.Type	Account#	User Name	Title	Email 🗘	Date 🗘	Status
Sales Dealer	01052	Ed Thomas		@gmail.com	05/04/2021	Active
Sales Dealer	01052	Ed Thomas		.com	08/05/2021	Active
Sales Training	01052	HUGH HART	Business Owner	@gmail.com	12/10/2019	Active
Sales Training	01052	John Smith	Programmer / Installer	Testing@urc.com	08/17/2020	Active
Sales Training	01052	Taylor Centers		@comcast.com	01/11/2021	Active

2. This option will allow you to search for a registered employee by their registered Email address.

Home > Find Existing E	mployee	
I Find Existing Em	ployee	
By Email 🗸		Search
No Email Found!		
Back To My Employ	/ee List	

3. Results are displayed if that users Email is located in the dealer account. If no matching Email is found, the results will show "No Email Found".

Additional Information & Resources:

If you need to register for a URC Portal account and need to know the process, please see the article How to Register for a URC Dealer Portal Account

If you need to add a new user to your **URC MCS/Offsite Programming** account and need to know the process, please see the article **Managing Your URC Dealer Offsite Programming Account** (www.urcmcs.com)