

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** .

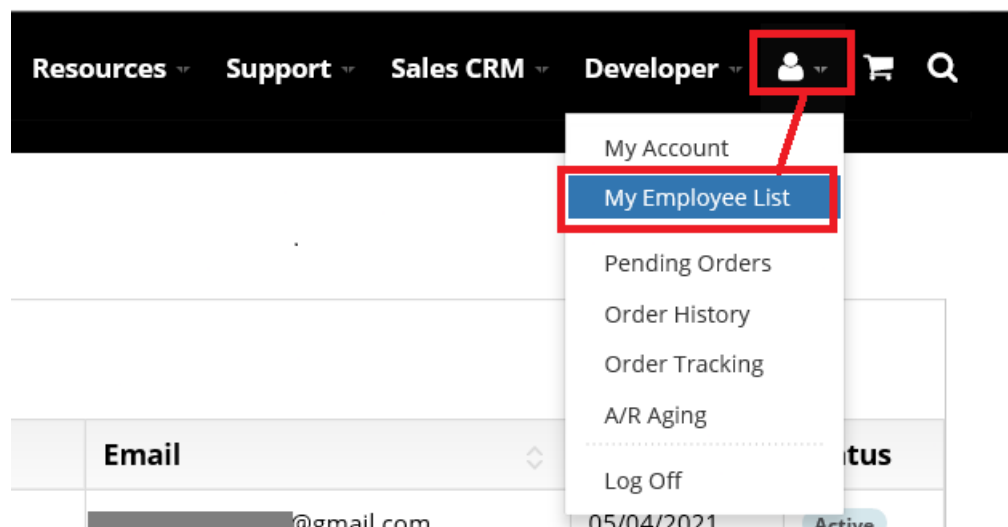
If you need to add a new user to your **URC MCS/Offsite Programming** account and need to know the process, please see the article **Managing Your URC Dealer Offsite Programming Account (www.urcmcs.com)**

Please be aware that a *Dealer Admin account must first exist before new users can be added and that **only** the **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:



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**.

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

[Add New](#) [Open Excel Email List](#) [Find Existing Employee](#)

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	Title
Sales Dealer	01052	Ed Thomas	--
Sales Dealer	01052	Ed Thomas	--
Sales Training	01052	HUGH HART	Busin
Sales Training	01052	John Smith	Prog
Sales Training	01052	Taylor Centers	--

[Add New](#) [Open Excel Email List](#) [Find Existing Employee](#)

2. 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):

My Employee List - Detail

ID#:

G/P Account#:

Company Name:

First Name:

Last Name:

Job Title:

Email:

Address 1: *

Address 2:

City: *

State: *

Zip Code: *

Account Type:

Status:

Ecommerce Block? *if checked, the dealer cannot use e-commerce function.

Send Password:

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:

Status:

Ecommerce Block? use 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.

Status: Active ▼
Active
Disabled the dealer cannot use e-commerce function.

Ecommerce Block?


Send Password:

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.

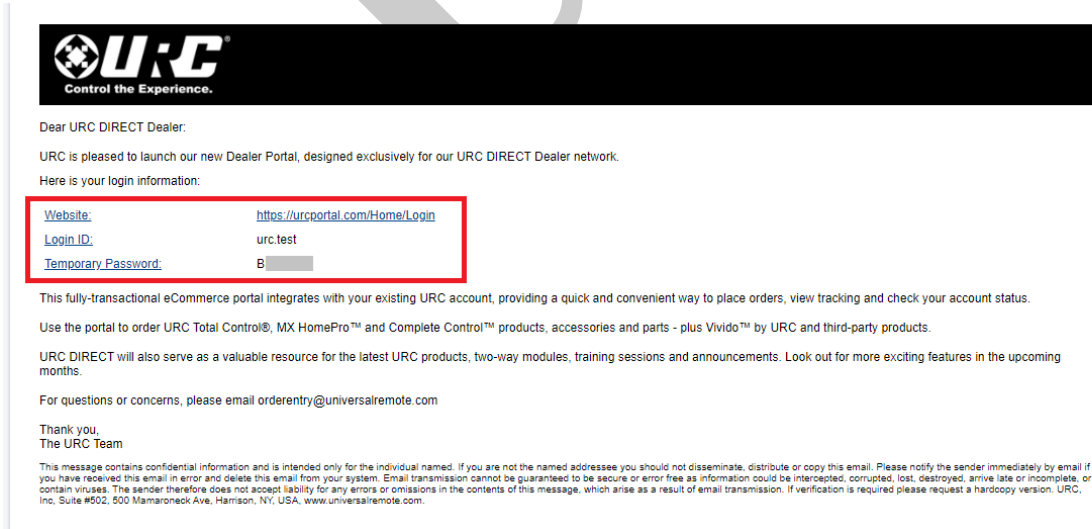
Ecommerce Block?  *if checked, the dealer cannot use e-commerce function.

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.

Send Password: 

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



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

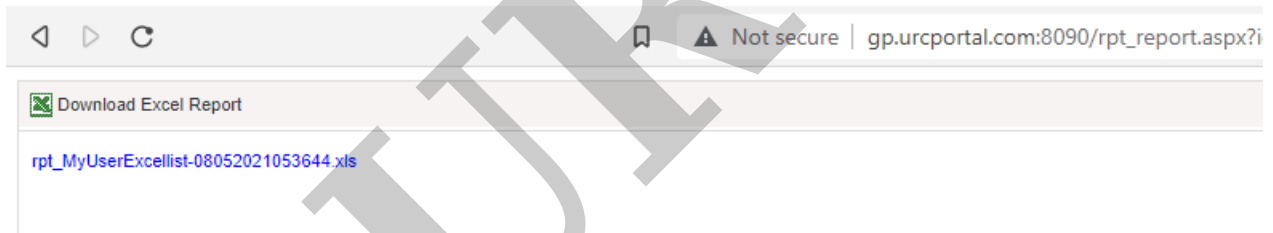
Active | Name/Email | Search

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

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Add New | **Open Excel Email List** | Find Existing Employee

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.



Find Existing Employee

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

1. 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

Active | Name/Email | Search

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

1 2 >



Add New | Open Excel Email List | **Find Existing Employee** | Search

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

Home > Find Existing Employee

Find Existing Employee

By Email | Search

No Email Found!

Back To My Employee 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)