# How to Assign 3rd Party Guest Role to a 3Pi Vendor Contact

If your office has data integration with a 3PI or Direct Feed provider, brokers can grant the Third Party Guest Role dash access to their 3PI vendor support staff to aid them in resolving broker issue and gain more clarity to expedite troubleshooting at their end. The access to 3PI vendor support staff will be owned by the broker within dash and the broker will be able to revoke the Third Party Guest Role, once his/her need is satisfied.

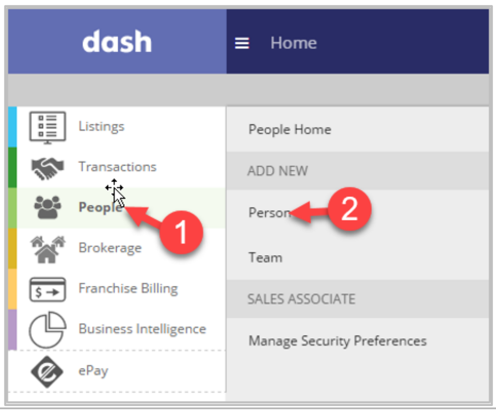
The Third Party Guest Role will only be available for selection, if an office is on a 3PI/feed provider.

Persons with Brokerage Admin security role in dash can assign, edit and revoke dash security role for a person's record in dash.

Fields marked with an asterisk (*) are mandatory. Follow the steps below to add a Third Party Guest User.

First, add the person to dash.

1. Click the **People** module on the left menu.
2. Then select **Person**.




## Essentials Tab:

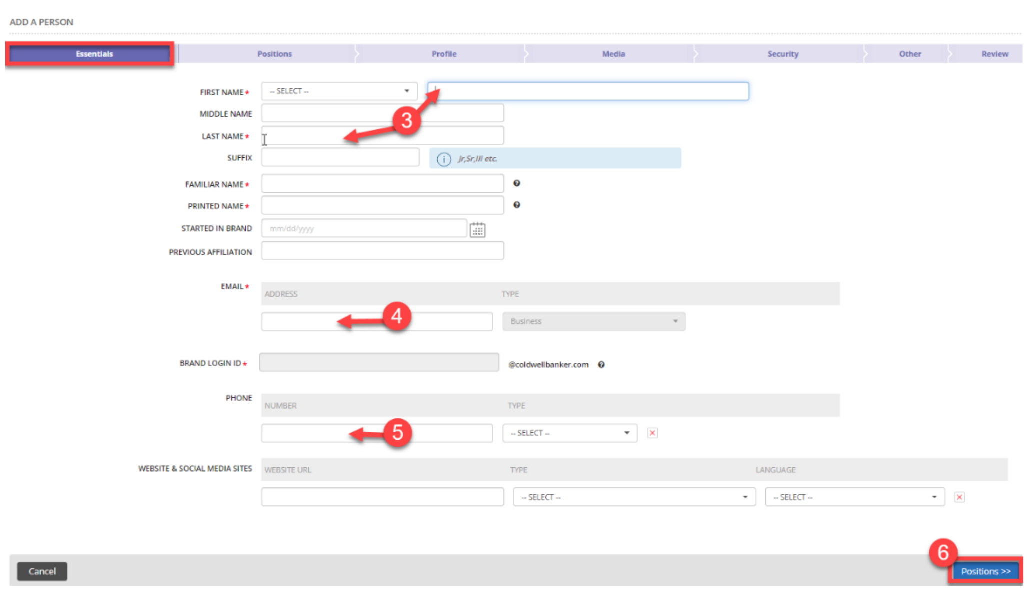
**The Add a Person Screen will be displayed.**

**In the Essentials Tab:**

3. Enter the person's **First Name** and **Last Name**
4. Enter the **Email**.

   The user's credentials will be sent to this email once saved.

5. Enter **Phone** number
6. Click **Positions** to move on.



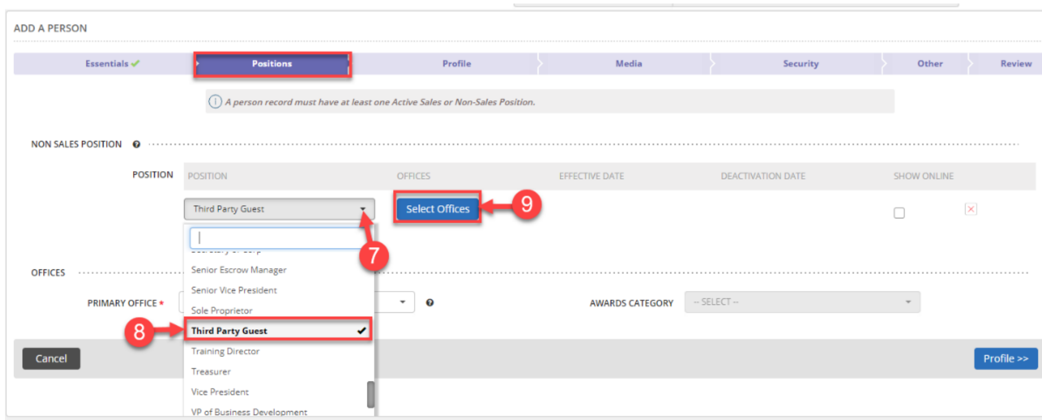
## Positions Tab:

In the Positions tab, scroll down to the **Non-Sales Position** section.

7. Click the **Position** dropdown menu to access the list of positions.

8. Select **Third Party Guest** from the list.

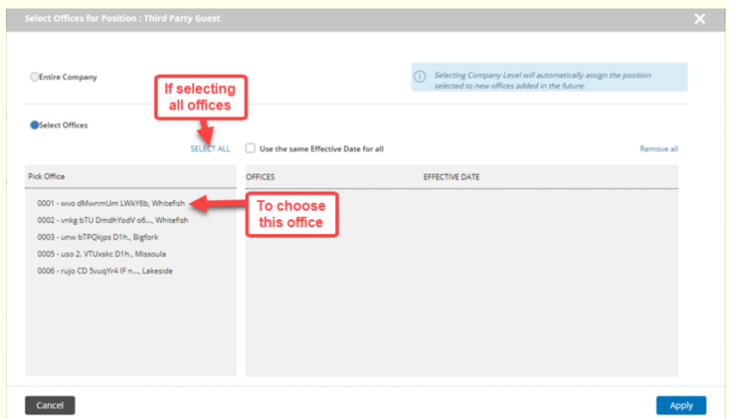
9. Next, click **Select Offices** to select the office(s) to associate the person.




The **Select Offices for Position: Third Party Guest** window displays.

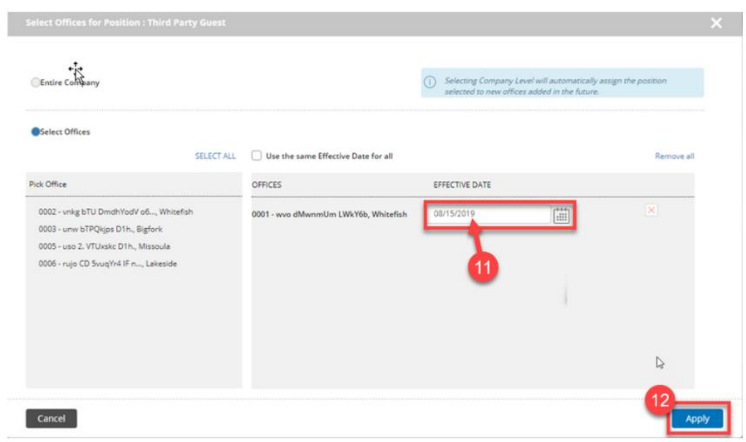
10. Click on the appropriate office(s) you want the person to have access to.

    You can also click **Select All**, if giving the user access to all offices within your company.



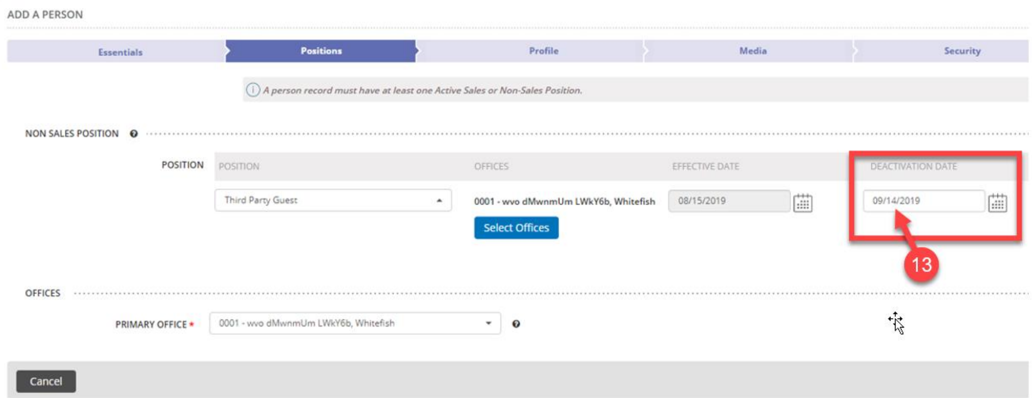

11. For each office selected, enter the **Effective Date**.

12. Click **Apply**.



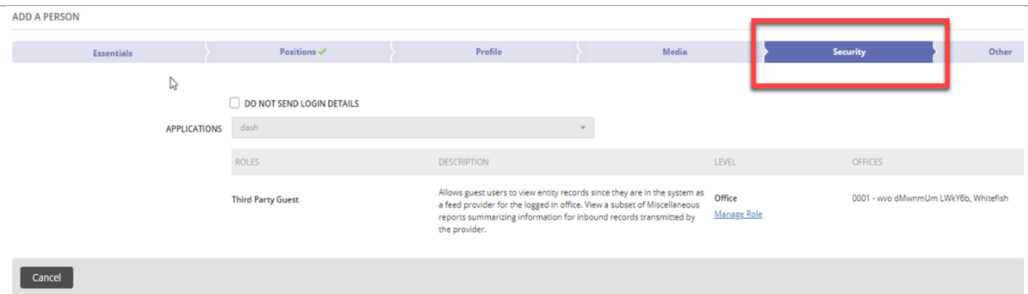
**13.** Next, enter the **Deactivation Date**.

**Note:** *The* ***Deactivation Date*** *is* *<u>mandatory</u>* *and will inform the system when the Third Party Guest user's account is close to its deactivation date and will trigger a "Third Party Guest deactivating in 30 days" alert on the People home page of dash.*




**Note:** There is no need to go into the Profile or Media tabs, as these tabs are not needed for 3rd Party Guest User account.

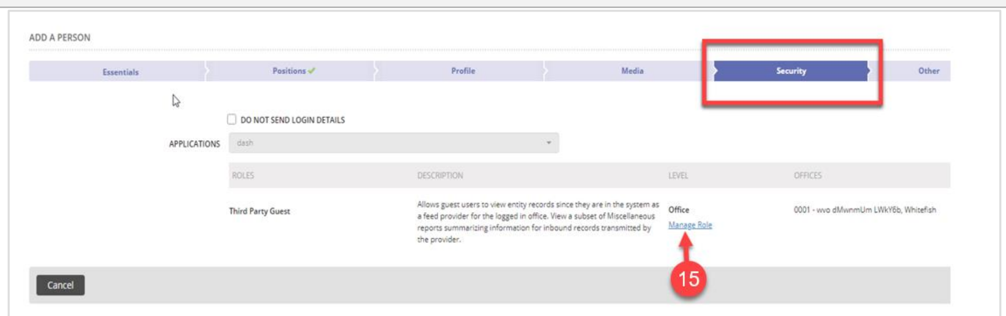
14. Next, click on the **Security** tab.




## Security Tab:

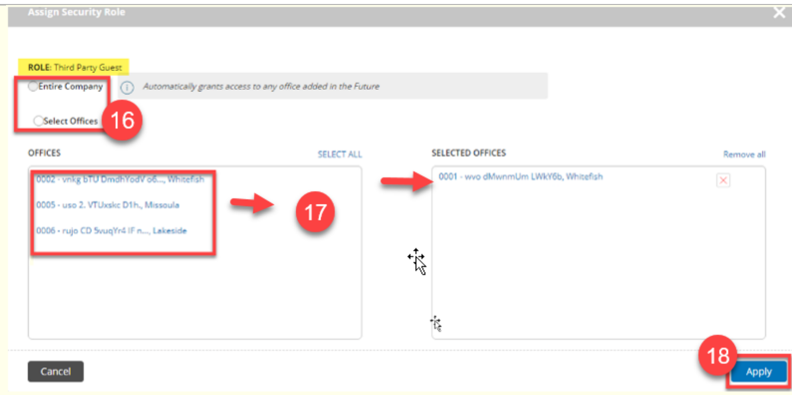
The Security tab is where you will assign or modify the person's dash access at company or office level

15. Click **Manage Role**



The **Assign Security Role** window displays.

16. Determine if assigning the user a dash security role at the Entire Company level, or office(s) level.
17. Click on the office(s) to select and move over to the **Selected Offices** column
18. Click **Apply**.

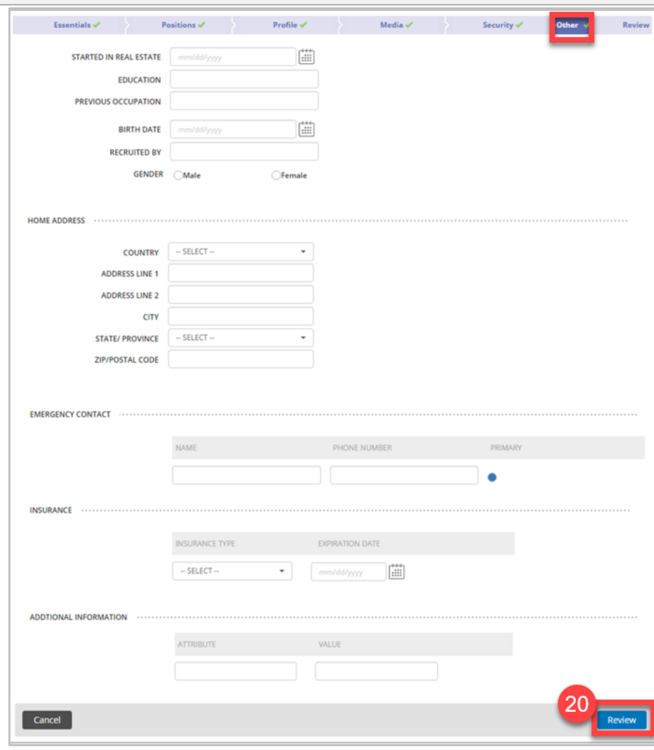



19. Click **Other** to move on.


## Other Tab:

**Note:** You are not required to enter any information in this **Other** section

20. Scroll to the bottom of the screen and click **Review** to move on

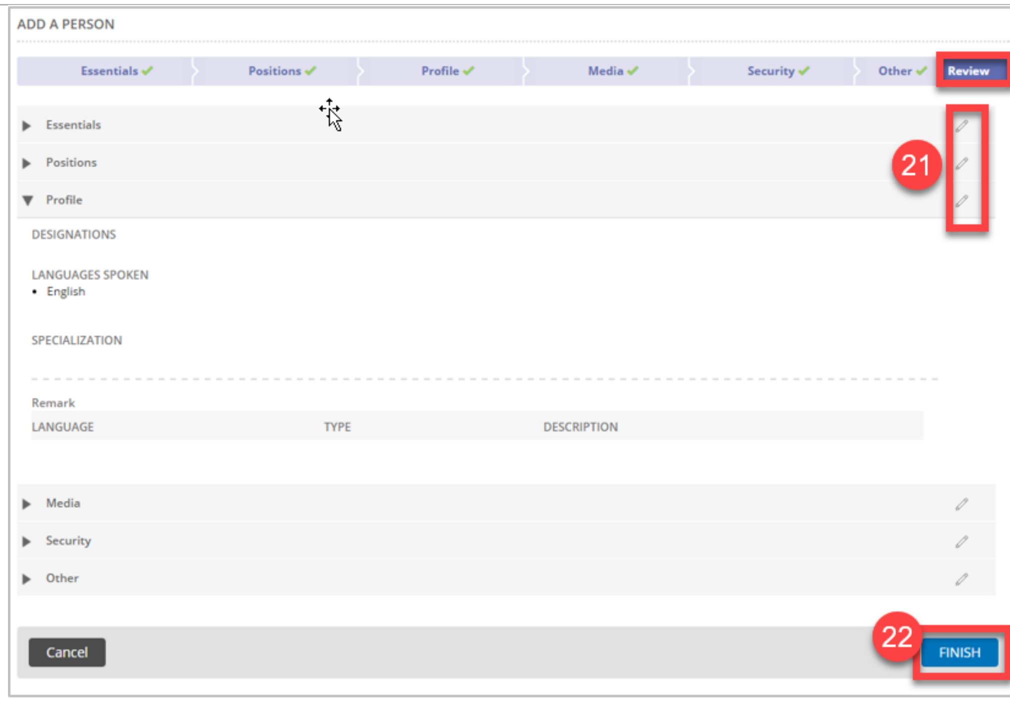



## Review Tab:

The **Review** tab allows you to review the information entered prior to submitting the person record.

21. Edit any section by clicking the pencil.
22. Click **Finish** to save the information.

A confirmation screen will display, letting you know that the person has been successfully added.

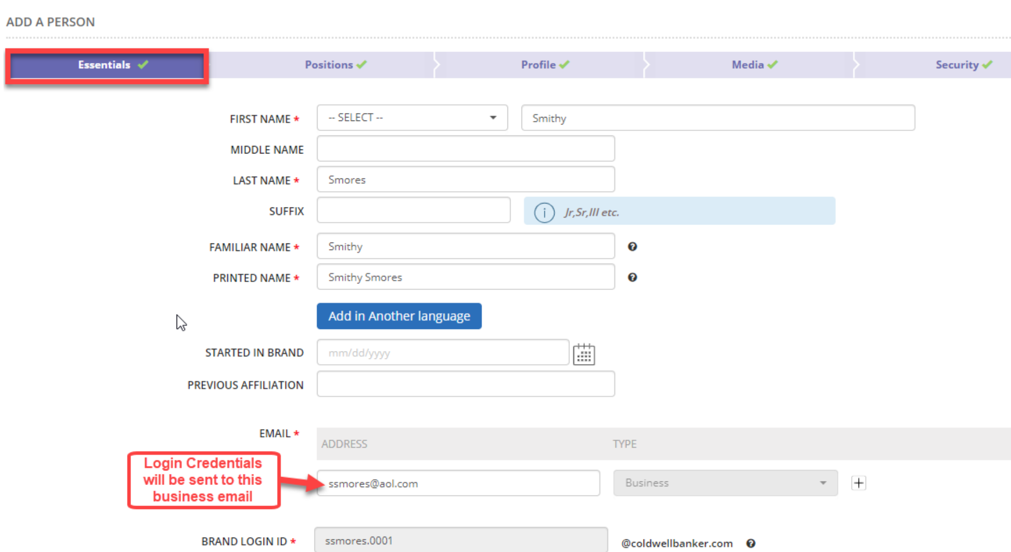



## THIRD PARTY GUEST USER ACCOUNT FREQUENTLY ASKED QUESTIONS (FAQs)

1. **How will the user receive his/her credential to access dash**
   Once the person is added to dash, the Credential communication (Email Login ID) will be emailed to the Third Party Guest similar to how it's communicated to other sales and non-sales persons added to dash.

   **Note:**The Third Party *Guest user account will be automatically deactivated when the provider of the office changes.*

   *Two emails will be sent to the user's Business Email which was added in the Essentials tab (see screen below). One email will have their **Username** and the other email will have the **initial password**.*



**2. How will you know if the Third Party Guest role is close to its deactivation date.**

There are three areas of the system that you can get information on when it's getting close to the actual *Third Party Guest Roles* deactivation date:

- An Alert for "*Third Party Guest Roles Deactivating in 30 days*" will appear on the dash Home Page showing the number of Third Party Guests that will soon be deactivated.

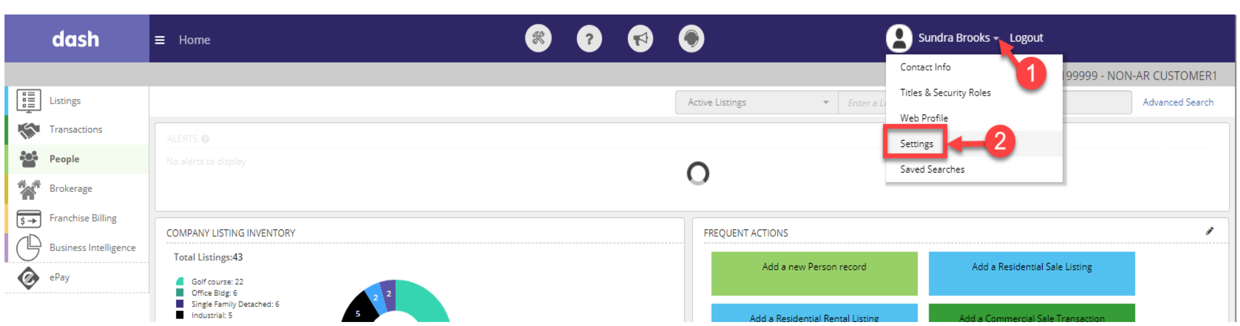
- An Alert for "*Third Party Guest Roles Deactivating in 30 days*" will appear on the dash People page that showing the number of Third Party Guests that will soon be deactivated. (See screen below)

- Also, in the Business Intelligence Module, a report named "Third Party Guest Roles Deactivating in 30 Days" will be available in the Alerts Report Category.

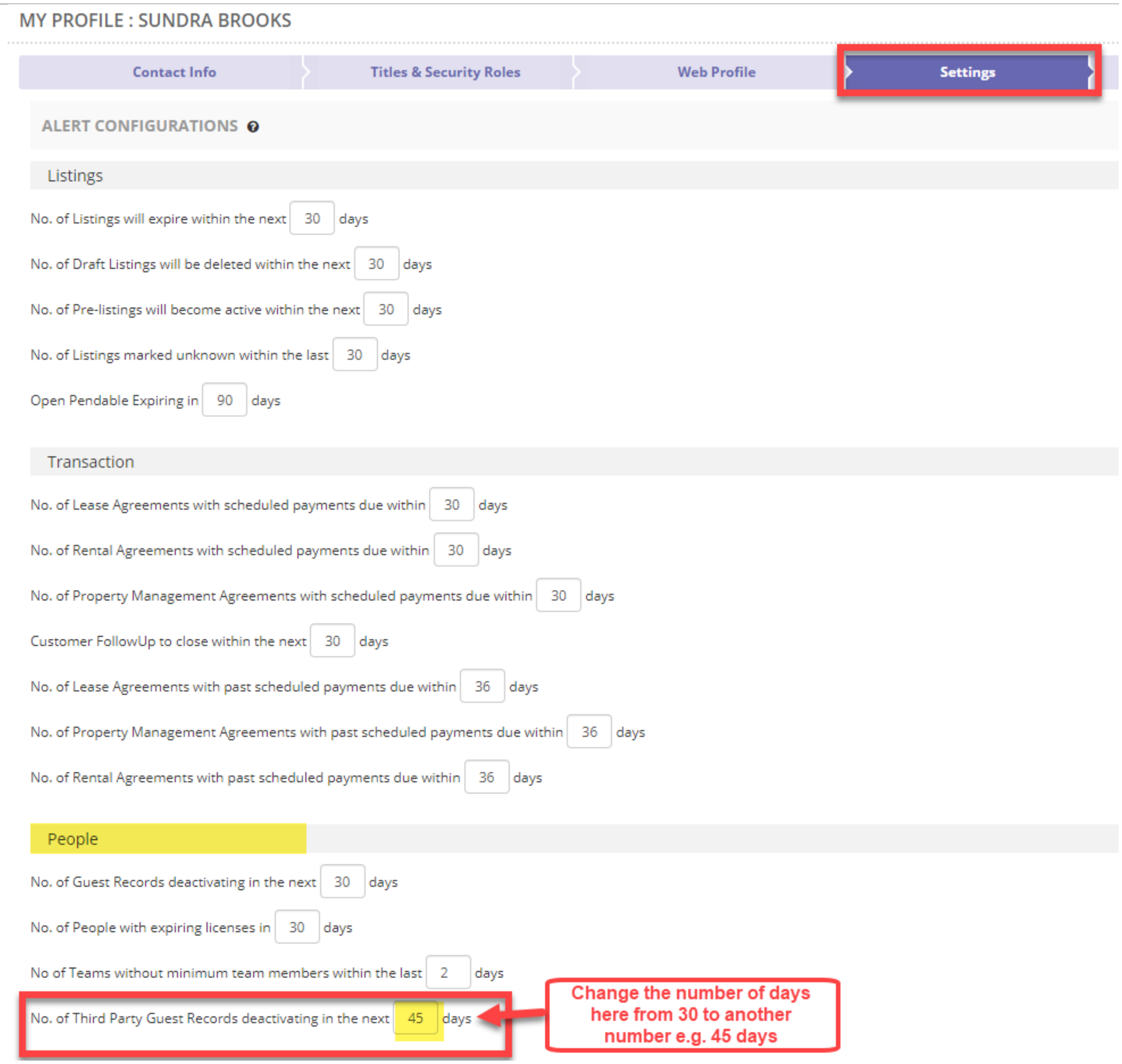

**3. How to alter/extend the Alert Configuration for Third Party Guest Role deactivating from 30 days to 45, 60 or 90 days.**

You can easily change the number of days before deactivation. To do so,

- From the top of the dash screen, click on the downward **arrow** next to your name,
- Then select **Settings**



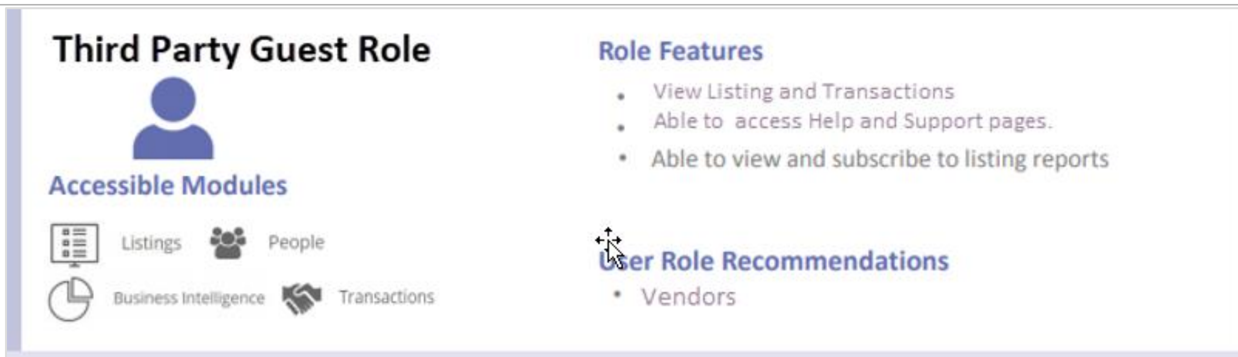

- Next, in the **Settings** screen, scroll down to the People section
- Then, for the alert configuration "No. of Third Party Guest Records deactivating in the next 30 days", change the number of days from 30 to your desired number e.g. 45 or 60 or 90 days.




4. ***Can a Third Party Guest be associated with or assigned any other Position or Title in dash?***

   *No, once a person is added as a Third Party Guest, he/she cannot be associated with any other title or position in dash.*

5. ***With regards to dash Security Role permissions, what will a Third Party Guest Role allow the user to access and do in dash?***




The user will have access to Listings, People, Transactions and Business Intelligence modules in dash with the following privileges to do the following:

**<u>From the dash Home Page</u>**

- **View:** Alerts, Company Listing Inventory, Frequent Actions, Browse Record Grids, Change UI Language, Announcements, Help Site and Support Page
- **Add:** Submit Product Feedback

**<u>In the Listing Module</u>**

- **View:** Browse Records Grid, Listing Quick Search, Listing Advanced Search, Listing View/Print

**<u>In the Transactions Module</u>**

- **View:** Alerts, View/Print Blank Forms, Browse Records Grid, Transaction Quick Search, Transaction Advanced Search, View/Print Transactions

**<u>In the People Module</u>**

- View: Alerts, View/Print Blank Forms, Browse Records Grid, People Quick Search, People Advanced Search, View/Print Team, View/Print Person

**<u>In the Business Intelligence Module</u>**

- View: Daily dash, Create Subscriptions
- Update: Edit Subscriptions, Delete Subscriptions

**<u>In the Reports Module:</u>**

Will only be able to access the following reports:

- Daily Business Activity Report
- Data Import Status Report
- Data Import Error Details Report