

Creating a Dealer Station Demo Account

What It Does

To make it easier to show customers the benefits of Dealer Station™ DDMS Edition, set up a demo account. Demo account orders that you or your customers submit:

- Are deleted (not processed by your DDMS system).
- Do not incur a transaction fee.

This works by creating a customer account number using the characters **DEMO**. You can assign any number of user IDs or names to the account. Although the system won't track any individual use of the demo account, you could give all your sales people their own user IDs. The account number must remain DEMO.

Note: On the Order Entry Exceptions Report, any Demo account number ticket will show up as deleted. If you see a great number of deleted tickets on the exceptions report, it's probably due to demos.

How to Do It

Setting up a demo account involves two basic tasks:

- Creating a DEMO customer account on your DDMS system. We'll explain how to do this in both text-based and graphical software.

- Setting up the DEMO account in Dealer Station.

Note: You will be working in the Parameters (LA) screen, so make sure no one else is adding customers while you are completing this procedure.

Creating the Account in Text-Based Software

To create a DEMO account on your DDMS system, follow these steps:

Note and Erase the Next Customer Account Number

- 1 Go to the (LA) screen.
- 2 Write down the number shown in the Next Customer # field. If this field is blank, go to step 7.

Note Keep this number carefully. The system uses it to ensure that each new account has a unique number. After you create the DEMO account, you will come back to this screen and restore that number to the Next Customer field.

- 3 Select the [C] Chg action code.
- 4 In G/L Loc, accept the default by pressing TAB, or specify a different location.

Creating a Dealer Station Demo Account

- 5 At Next Customer #, clear the field by pressing the SPACE BAR once, and then TAB.
- 6 Press RETURN until the screen refreshes and your cursor is in the Action [] field.
- 7 Press ESC until the Main Menu appears.

Create the DEMO Account

- 8 Go to the (A) screen.
- 9 Select the [A] Add action code.
- 10 At Name, type **DEMO**
- 11 At Unique Record OK to Add, press TAB.
- 12 At Acct #, type **DEMO**
You do not need to complete any other boxes.
- 13 Press RETURN until the screen refreshes and your cursor is in the Name field.
- 14 Press ESC until the Main Menu appears.

Restore the Next Account Number

If in Step 2 the Next Customer # field was blank, go to **Setting Up the DEMO Account in Dealer Station.**

- 15 Go back to the (LA) screen.
- 16 Select the [C] Chg action code.



- 17 At G/L Loc, accept the default by pressing TAB, or specify a different location.
- 18 At Next Customer #, type the number you wrote down.
- 19 Press RETURN until the screen refreshes and your cursor is in the Action field.
- 21 Press ESC until the Main Menu appears.
- 22 Go to the instructions for **Setting Up the DEMO Account in Dealer Station.**

Note: For more details about the customer parameters, see **Section 2: Setting and Changing the Customer Parameters** in “Chapter 24: Customer Database Parameters” of *Book I: Customers, Vendors, and Salespersons*.

Creating the Account in Graphical Software

To create a DEMO account on your DDMS system using graphical software, follow these steps:

Note & Erase the Customer Account Number

- 1 On the Master Menu, click  .
- 2 Click  . The (L) Parameters screen opens.
- 3 Select the [A] Customer & A/R action code.

Creating a Dealer Station Demo Account



- 4 Write down the number shown in the Next Customer field. If this field is blank, go to step 9.

Note Keep this number carefully. The system uses it to ensure that each new account has a unique number. After you create the DEMO account, you will come back to this screen and restore that number to the Next Customer field.

- 5 Select the [C] Chg action code.
- 6 At G/L Loc, accept the default by pressing TAB, or specify a different location.
- 7 At Next Customer #, clear the field by pressing the SPACE bar once, and then TAB.
- 8 Press RETURN until the screen refreshes and your cursor is in the Action [] field.
- 9 Press ESC until the Graphical Master Menu appears.


For details about the (LA) screen, see “Setting LA Screen Parameters” in online Help under KeyOp Menu > Parameters > Setting Parameters.

Create the DEMO Account

- 10 From the Graphical Master Menu, click  .
- 11 To add a new customer, click  .
- 12 At Acct #, type **DEMO**

- 13 At Name, type **DEMO**



You do not need to complete any other boxes.

- 14 To save the account, click  .
- 15 Close the window.

For details, see “Adding a Customer” in online Help under Customer > Customer Basic Procedures.

Restore the Next Account Number

If in Step 4 the Next Customer # field was blank, go to **Setting Up the DEMO Account in Dealer Station.**

- 16 On the Graphical Master Menu, click  .
- 17 Click  . The (L) Parameters screen opens.
- 18 Select the [A] Customer & A/R action code.
- 19 At Next Customer #, type the number you wrote down.
- 20 Press RETURN until the screen refreshes and your cursor is in the Action [] field.
- 21 Press ESC until the Graphical Master Menu appears.
- 22 Go to the instructions for **Setting Up the DEMO Account in Dealer Station.**

Creating a Dealer Station Demo Account

Setting Up the DEMO Account in Dealer Station

After you've created the DEMO account on your DDMS system, you must set up the DEMO account in Dealer Station.

Create the DEMO Account

To create the DEMO account in Dealer Station, follow these steps:

- 1 Log in to Dealer Station DDMS Edition Administrative Control Panel.
- 2 Click **User Accounts**.
- 3 Click **Add User**.
- 4 Complete the following boxes as shown:

Status	Active
First Name	Demo
Last Name	Demo
User Name	Demo
Password	Demo
Account Number	DEMO

Note DEMO must be all caps for Account Number.

5 Click **Save**.

6 Click **Admin Home**.

Note You do not need to fill out any other boxes or set any optional parameters. Remember, the system will delete any orders the DEMO account user submits. For details on using the Administrative Control Panel to add DEMO accounts and users, see **Adding New and Guest Users** in “Chapter 7: User Accounts” of *Setting up Dealer Station DDMS Edition Admin Pages*, available on our website at www.ddms.com/support/doc/dealerstationdoc.htm

Test the DEMO Account

You can use these test procedures any time you want to give a demonstration to a client.

- 1 Log on to Dealer Station DDMS Edition, using the login name and password you assigned to the DEMO account.
- 2 Use the Browse Catalog, Quick Order, View Cart, Today's Specials, and any other features you have set up globally for your users.

For details, see “Using Dealer Station DDMS Edition”, available on our website at www.ddms.com/support/doc/dealerstationdoc.htm.