

# **DTN Sales & Marketing Solution - Sellers**

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# About DTN Sales & Marketing Solution - Sellers

DTN's Sales & Marketing Solution allows suppliers to present a cohesive view of alerts, allocations, contracts, forecast, loading data, pre-orders and terminals to their customers and internal users. When suppliers access is granted, users can make informed and strategic decisions regarding their day-to-day and long-term activity.

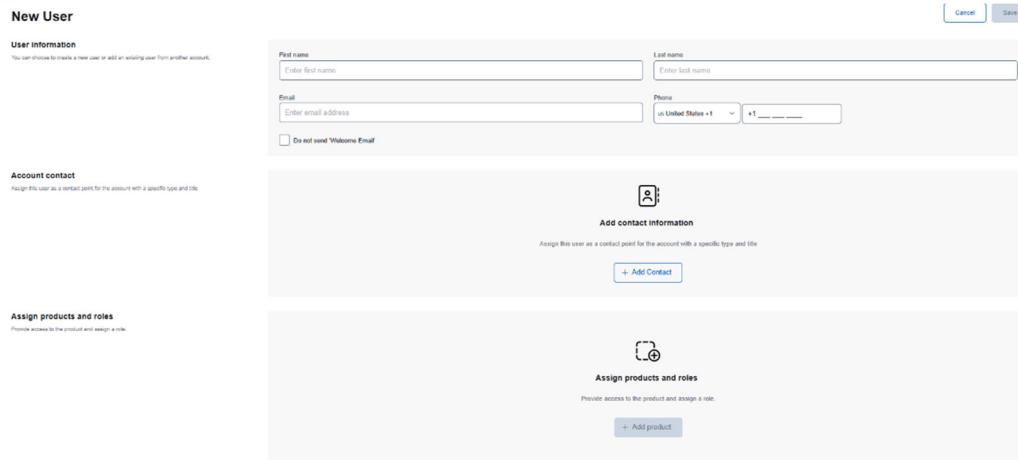
## Setting up DTN Sales & Marketing Solution

Upon setup by DTN, your system administrator will receive a welcome email to DTN's Identify Management Tool (IMT). Your system administrator can then create access for internal or external users based on the functionality and level of access they should be given.

## Configuring DTN Sales & Marketing Solution for Internal Users

### How to grant internal users access via the website

1. Login to <https://identity-management.auth.dtn.com/> using credentials provided in your welcome email.
2. Select Licensed Users.
3. Select Add User to open a setup form.



New User

User information

You can choose to create a new user or add an existing user from another account.

First name  Last name

Email  Phone

Do not send "Welcome Email"

Account contact

Assign this user as a contact point for the account with a specific type and title

Add contact information

Assign this user as a contact point for the account with a specific type and title

+ Add Contact

Assign products and roles

Provide access to the product and assign a role.

+ Add product

4. Enter first name, last name and email address. Phone numbers are optional.
5. A welcome email is automatically generated once user access is granted. To suppress this email, check Do not Send "Welcome Email".

6. Select Add Contact to assign the user as a contact point for the account with a specific type and title. Options are:
  - a. Primary
  - b. Billing
  - c. Support
7. Select Add Product to assign products and roles to the user.
8. Using the Product dropdown menu, select Seller Storefront.
9. Using the Product Role dropdown, select the role a user should have. Options are:
  - a. Admin – Generic Admin role
  - b. Purchase – Provides the ability for a user to purchase products from DTN's Sales & Marketing solution. This option should be selected for external users.
  - c. Supplier – Allows supplier to access DTN's Sales & Marketing solution. This option is typically used for internal users.
  - d. User – Generic User role
10. Select Save at the top of the page.
11. The user will now be displayed under Licensed Users.

## How to grant internal users access via an import

1. Login to <https://identity-management.auth.dtn.com/> using credentials provided in your welcome email.
2. Select Licensed Users.
3. Select Import Users.
4. Download a sample template. Options are:
  - a. CSV
  - b. JSON
  - c. XLSX
5. Enter user information on the selected template.
6. Drag & drop or click the icon to upload.

**Bulk User Import**

Add users in Bulk to Omaha Oil Test

Download sample template: [CSV](#) [JSON](#) [XLSX](#)

**Drag & drop or click to upload**

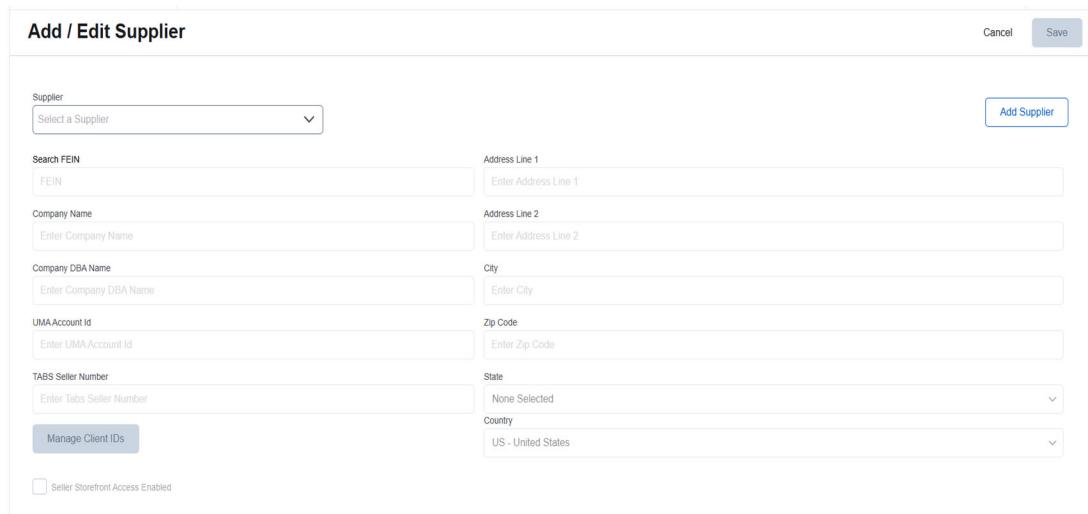
Support CSV, JSON or XLSX files  
Maximum file size: 100.00 MB  
Maximum number of files: 1



# Configuring DTN Sales & Marketing Solution for External Users

## How to grant internal users access via the website

1. Login to <https://partnerships.dtn.com/> using credentials provided in your welcome email.
2. Select Add Company.



**Add / Edit Supplier**

Supplier

Address Line 1

Address Line 2

City

Zip Code

State

Country

Search FEIN

Company Name

Company DBA Name

UMA Account Id

TABS Seller Number

Seller Storefront Access Enabled

3. Enter the required fields. These fields are:
  - a. Company Name
  - b. DBA Name
  - c. FEIN
  - d. State
4. Fill in user details for the buyer account.
  - a. First Name
  - b. Last Name
  - c. Email
5. Select Storefront under Product and grant role of USER.
6. 7. User will receive a welcome email with a login link.
7. Buyers will be able to add additional users.