

How To Setup NXT Users Permissions

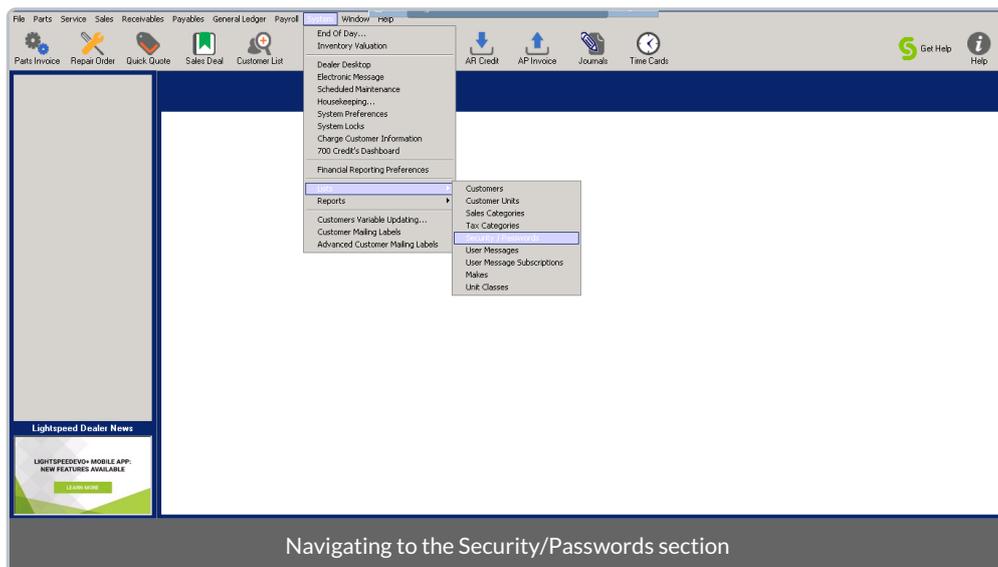
Last Modified on 11/02/2020 3:47 pm CST

Welcome to the wonderful world of setting up LightspeedNXT for More Than Rewards 'Rider Rewards' program. All in all, this should be a simple, step-by-step process, just make sure to compare the screen you're looking at with the screenshots provided, follow all the instructions and you should be done in no time!

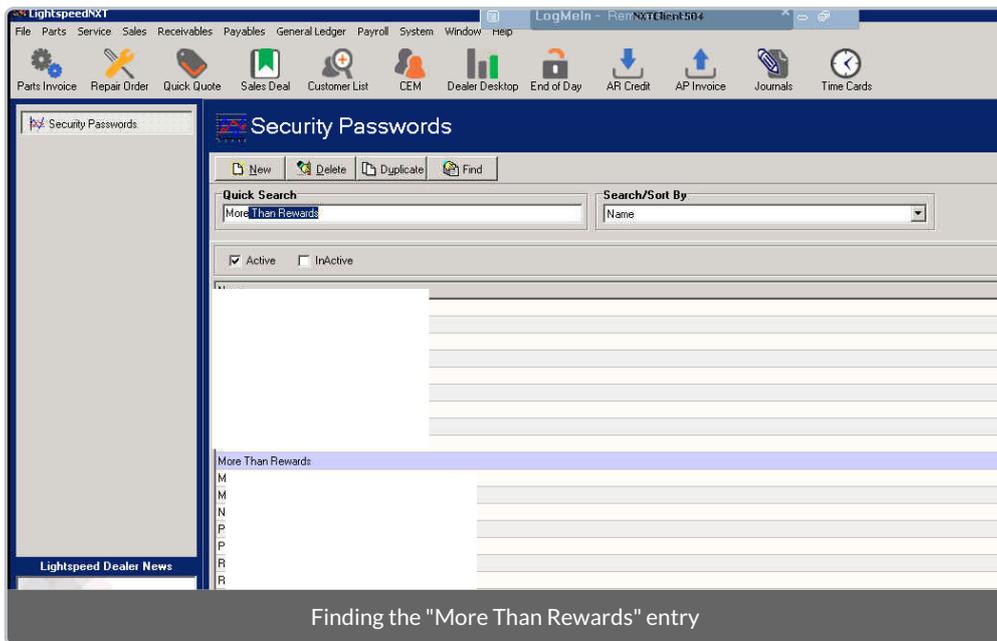
Our goals here are two-fold:

1. Setup a "sub-account" for MoreThanRewards to pull your data daily so everything is up-to-date
2. Make certain that this "MoreThanRewards" sub-account has all the appropriate permissions it will need

To get started, use your dealership's admin credentials for LightspeedNXT, and login. These should have been provided to you by NXT when you were being setup with them. When you reach the NXT home page, click on the "System" menu on the very top of the screen, and navigate to "Lists" - from there, click "Security / Passwords".

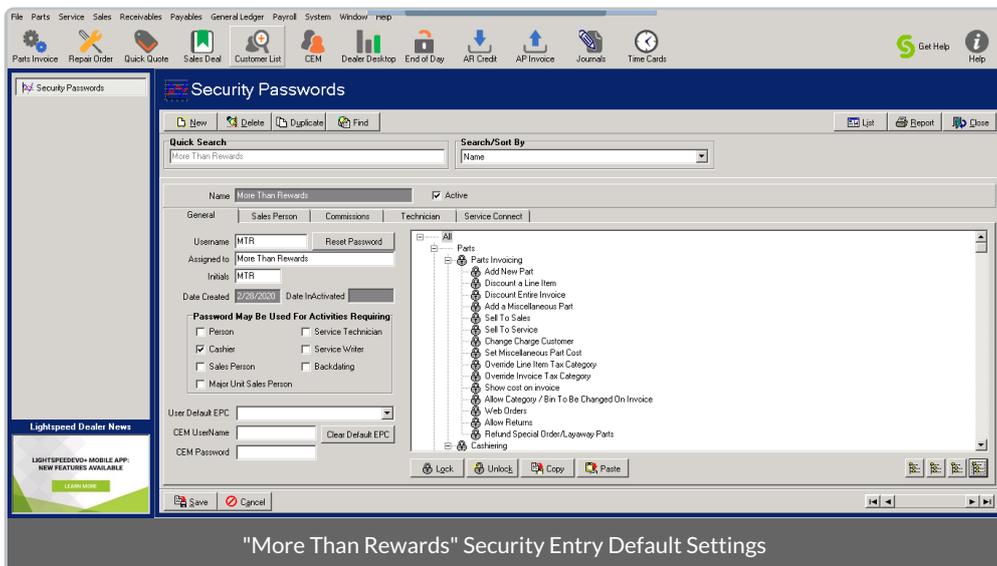


From this list search and find an entry labelled "More Than Rewards" --- if it is not found in this list, then create it by hitting "New".



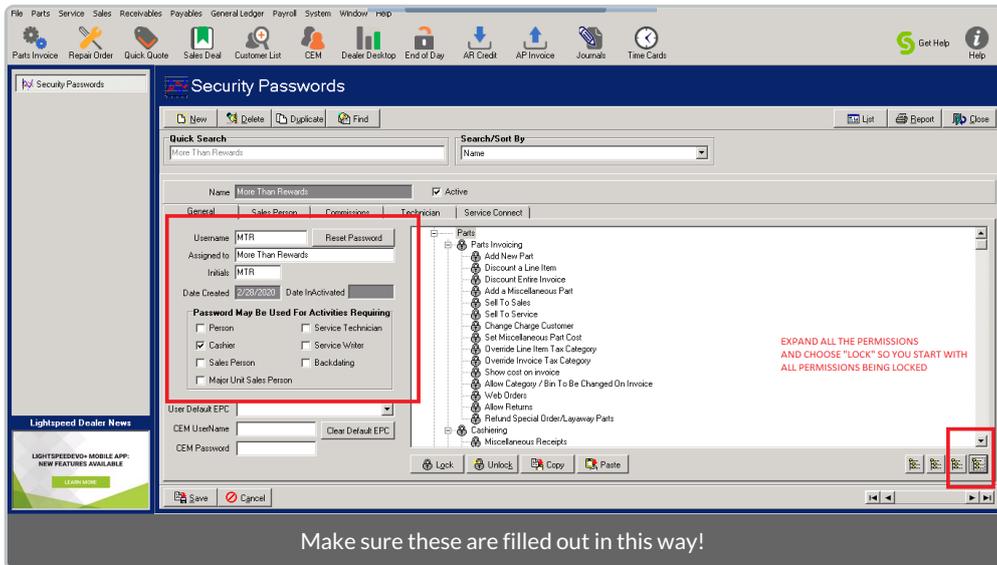
Finding the "More Than Rewards" entry

Once that is done, open that entry by clicking it and you should be greeted by a screen like this:

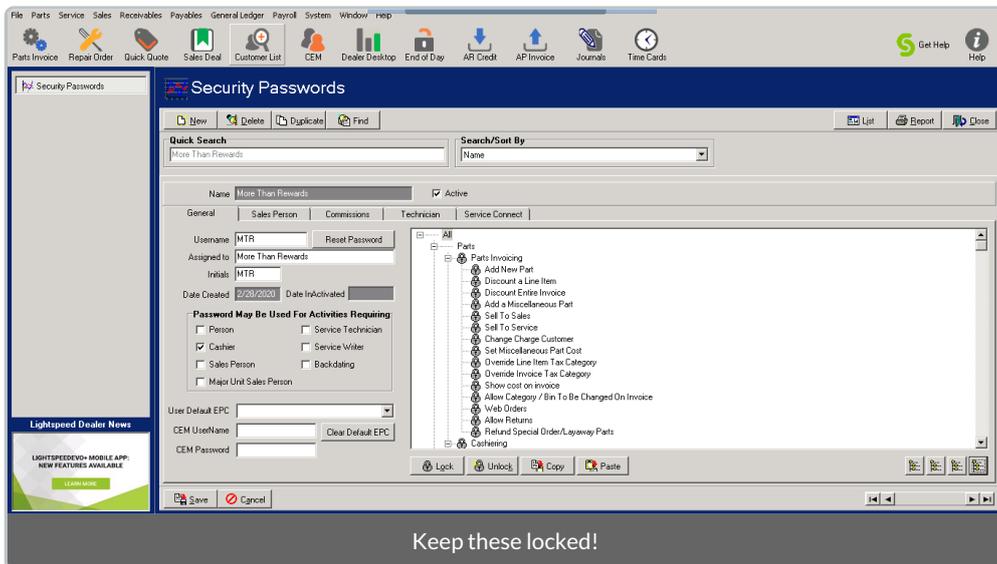


"More Than Rewards" Security Entry Default Settings

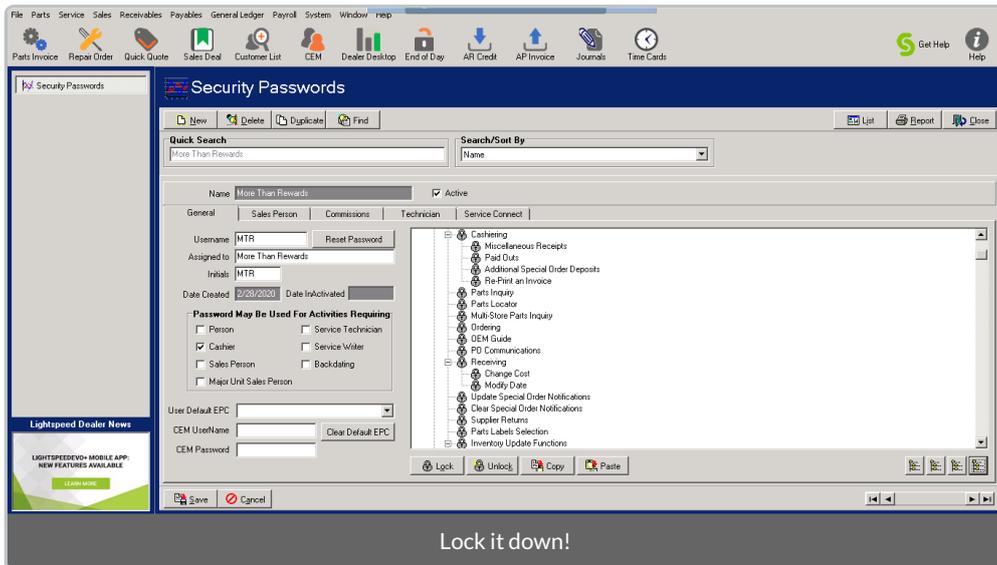
Make certain that on this page these options (highlighted with the red box) are taken care of properly. Username should be "MTR", Assigned to 'More Than Rewards', Initials "MTR", and that the Password May Be Used For Activities requiring "Cashier". Also, note the bottom right corner --- the button on the bottom right will allow you to "expand" all the permissions trees, please do this and make certain to scroll through and verify that *ALL* permissions begin as 'being locked'.



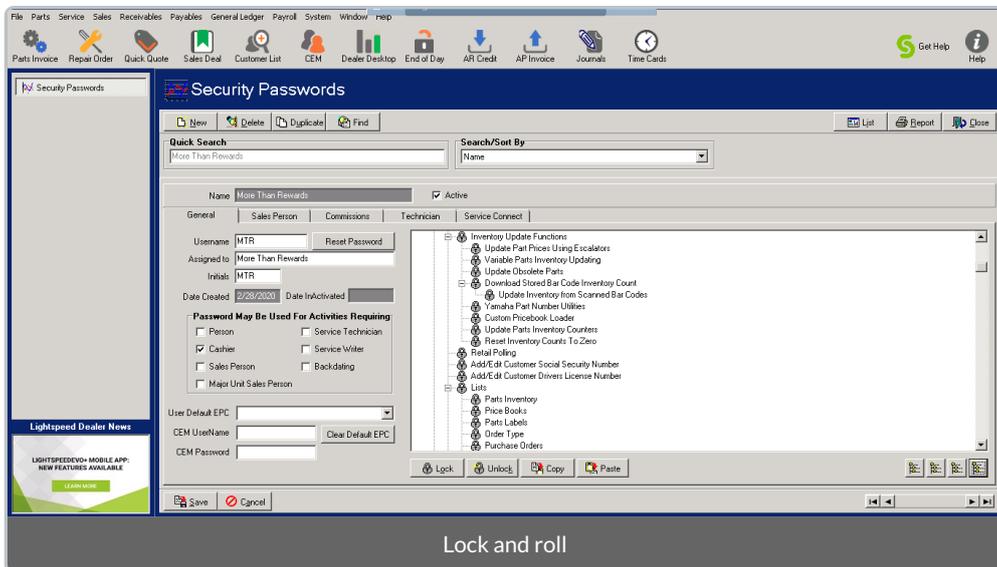
Keep all the various “Menus” expanded and begin to review each node - keeping these first few (in the screenshot) locked.



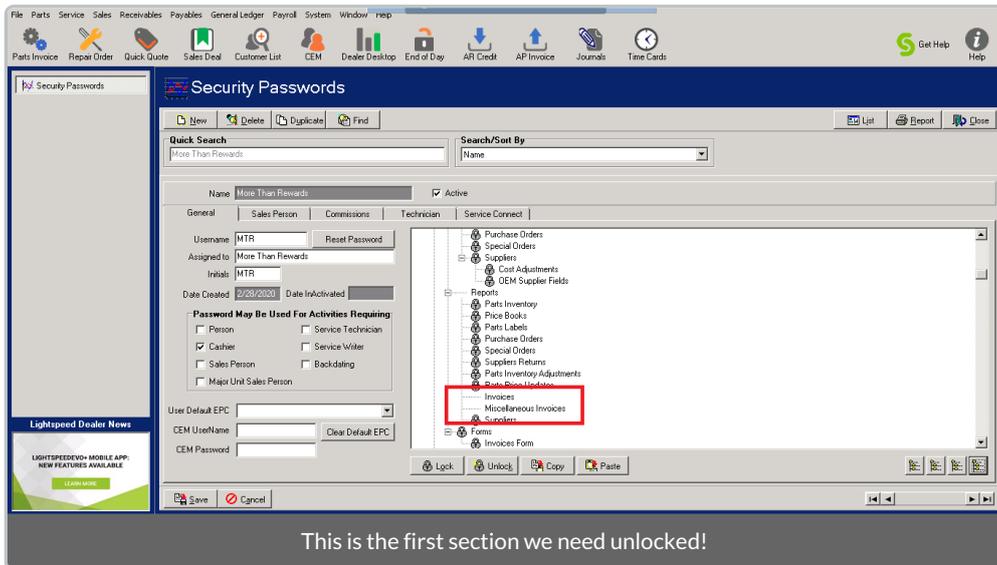
Keep these nodes locked and unchanged as well.



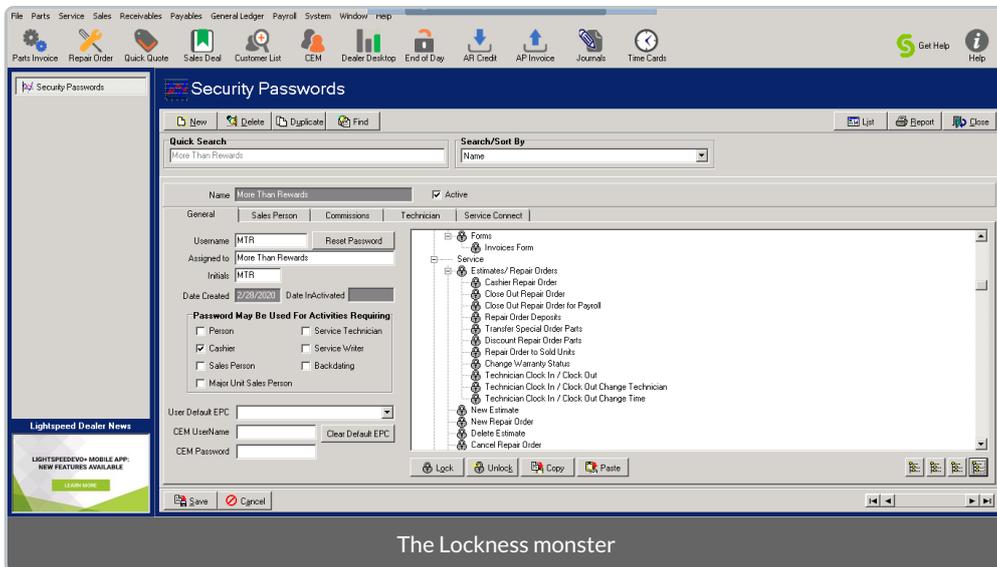
Yes, keep all these locked as well!



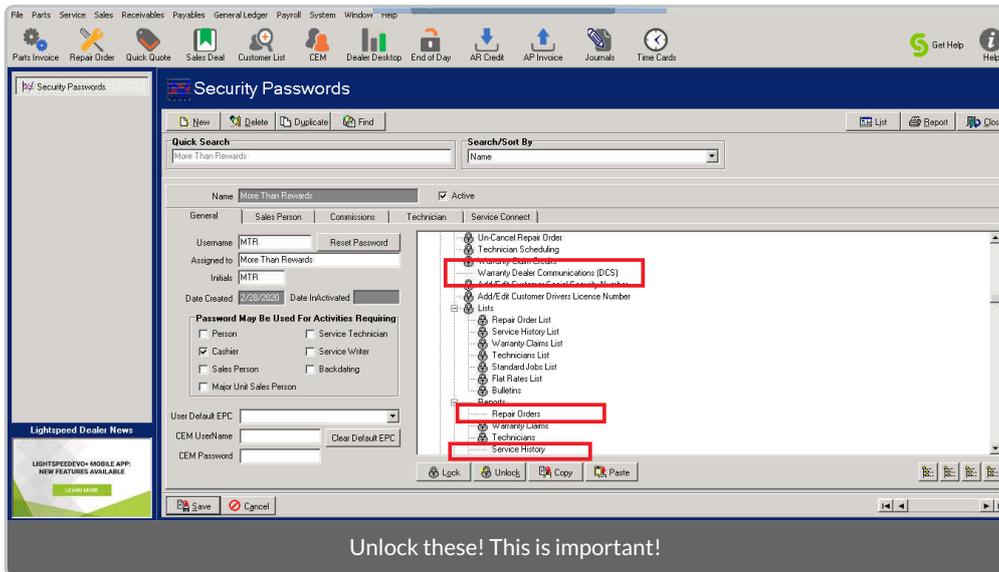
Stop! Unlock time! Make certain that "Invoices", and "Miscellaneous Invoices" inside of "Reports" is unlocked. You're doing great!



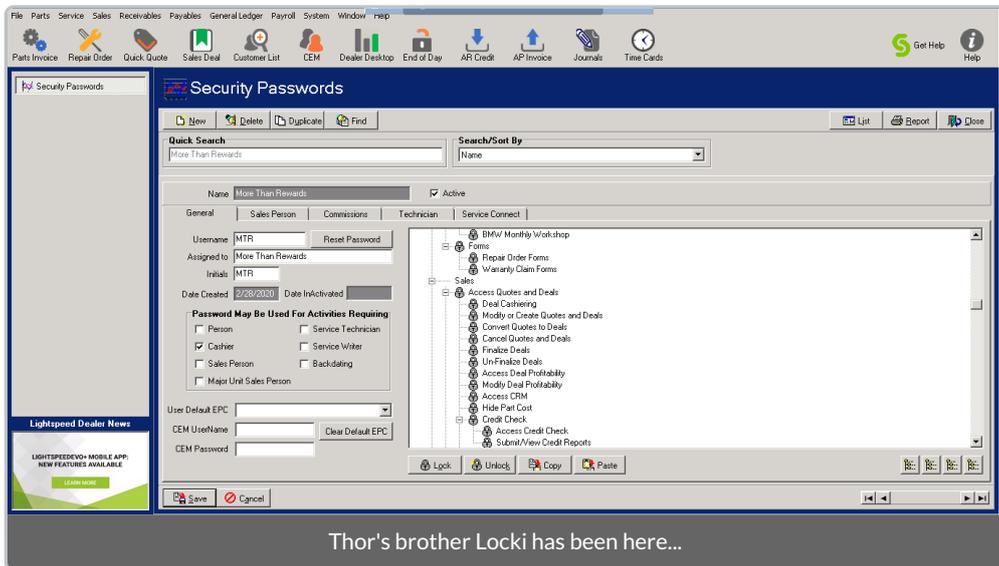
Keep this series of nodes locked as well --- keep scrolling down - you're almost there!



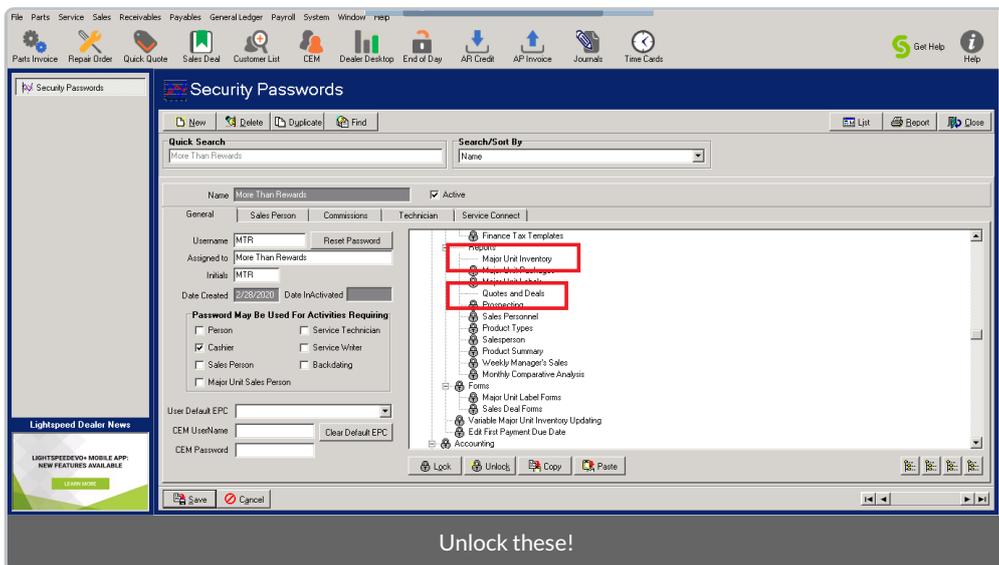
Stop! Make certain that "Warranty Dealer Communications (DCS)" is unlocked, as well as "Repair Orders" and "Service History" under "Reports".



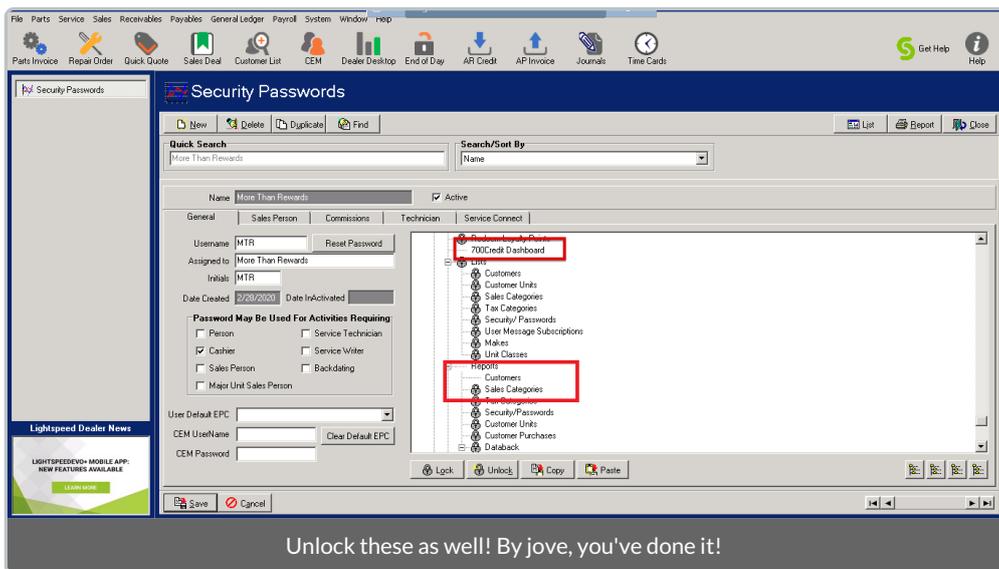
The following nodes should stay locked!



Make certain that "Major Unit Inventory", and "Quotes and Deals" are also unlocked underneath "Reports".



Finally, scroll down a bit and make certain that “700Credit Dashboard” and “Customers” (underneath Reports) is unlocked.



That should do it! If you've been following along carefully, you should be all set for our automated NXT extraction.

To review, we need to make certain that all these reports are “unlocked”

- Invoices
- Miscellaneous Invoices
- Warranty Dealer Communications (DCS)
- Repair Orders
- Service History
- Major Unit Inventory
- Quotes and Deals
- 700Credit Dashboard
- Customers

All of these “reports” are found underneath various “Reports” Menu, so make sure to cross-reference with the images we are supplying you so you can unlock the correct report - we will have data issues otherwise and our support team will have to call you and bug you about it!

After all these various reports are unlocked, you should be all good to go --- please inform your roll-out coordinator so we can get your Rewards program fired up, and we’ll be getting more customers into your store in no time!

Thanks so much for being part of the Rider Rewards family, and we’ll see you out there on the road!

