

# Understanding User Roles in the Dealer Portal



## 1. PRIMARY USER

If you are the primary user, you do not need to assign yourself any other roles – the primary user role has all the permissions that the other roles do and then some! This means the primary user can:

- Assign user roles to others
- Remove permissions from users
- Complete a license renewal application
- Report a dealer license plate as lost or stolen
- Request a replacement dealer license plate
- Print interim license plates
- Order and pay for credits for interim license plates
- Request an increase in plate limit (dealer and interim)
- Request additional dealer plates
- Pay invoices

The primary user will have overall control of the dashboard. The primary user should be the person that is overall responsible for the operation of the business and one that is not likely to change (e.g. the owner).

## 2. ADMINISTRATOR



This role has all the functions of the primary user. The only exception is that the administrator cannot edit the primary user's roles. More than one person can be assigned the administrator role if the primary user chooses.

- Assign user roles to others
- Remove permissions from users (except the primary user)
- Complete a license renewal application
- Report a dealer license plate as lost or stolen
- Request a replacement dealer license plate
- Print interim license plates
- Order and pay for credits for interim license plates
- Request an increase in plate limit (dealer and interim)
- Request additional dealer plates
- Pay invoices



## 3. FINANCE/SALES

This role is limited to the following functions:

- Print interim license plates
- Order and pay for credits for interim license plates
- Request an increase in plate limit (dealer and interim)
- Request additional dealer plates
- Pay invoices



## 4. GENERAL PLATES



This role is limited to printing interim license plates.  
No other functions are available.

# Important Notes about User Roles



## 5. GENERAL OFFICE

This role is limited to the following functions:

- Request an increase in plate limit (dealer and interim)
- Request additional dealer plates
- Pay invoices

- Assigning the primary user more than one role can cause issues that may result in the system telling the primary user that their access to interim plates is denied. If you're a primary user, that's the only role you need for that dealership!

- The primary user can be changed using the Amendment to Owner, Officer, or Partner Application (State Form 55954).

- Any user authorized by the Primary Owner or Administrator can be subscribed to receive subscriptions (e.g. insurance expiration notifications, system changes, etc.).

-Subscriptions are set on the Manage Users page by selecting the "Subscription Management" tab.

- Primary User is the only role that cannot be assigned to multiple people.

## 6. GENERAL PLATES AND OFFICE



This role is limited to the following functions:

- Print interim license plates
- Request additional dealer plates
- Request an increase in plate limit (dealer and interim)
- Pay invoices