

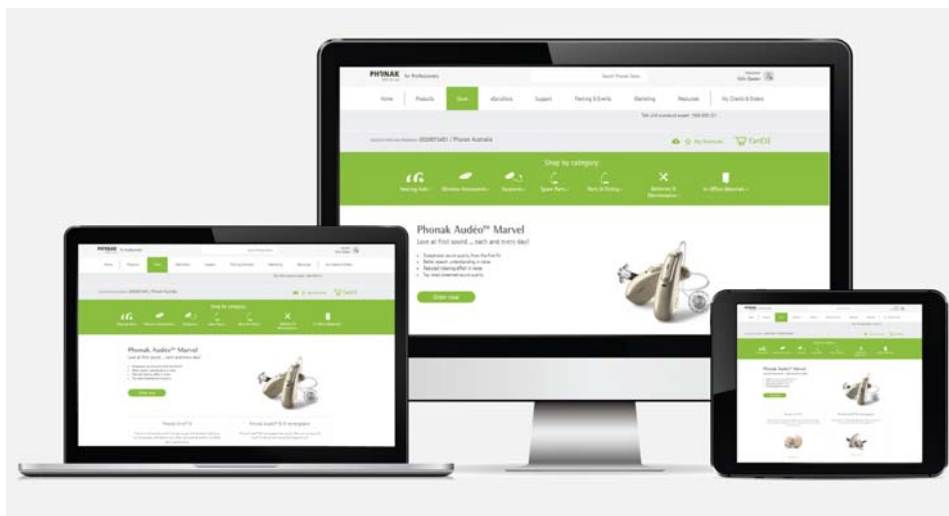
Phonak eStore User Guide – User Management

August 2019

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Contents



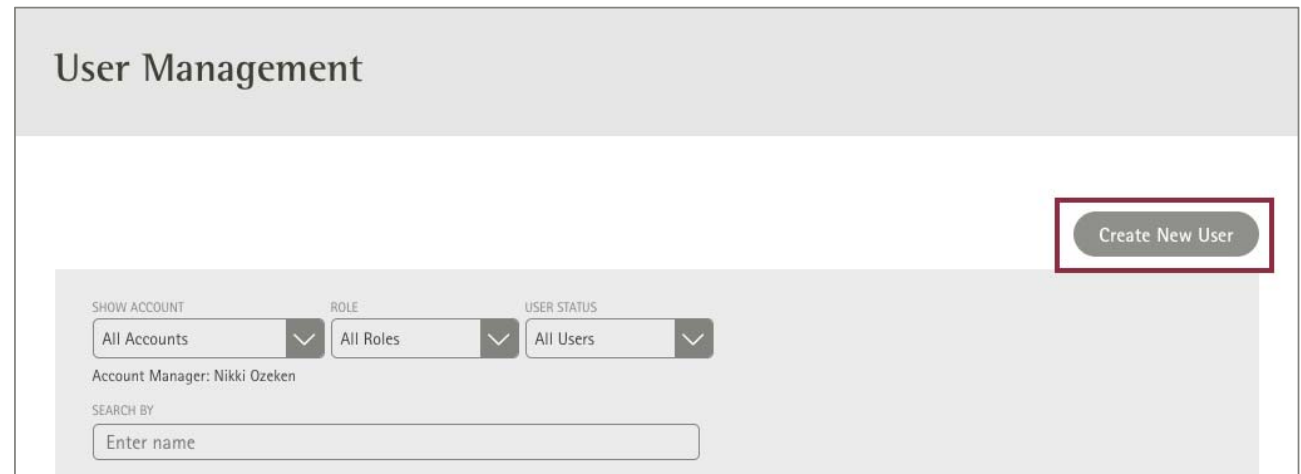
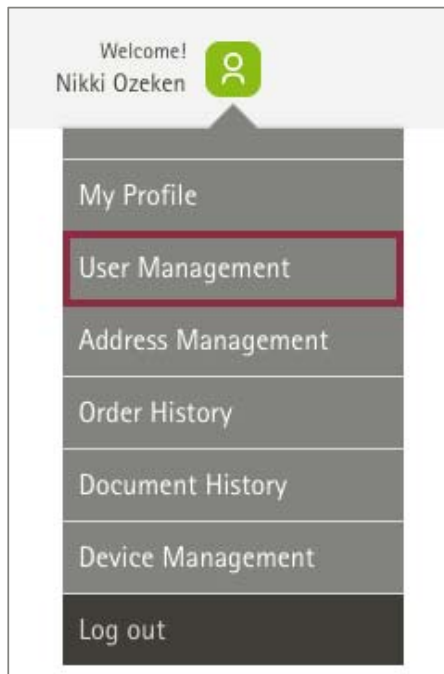
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Creating New Users

Only the Account Manager and Account Admin can set up the new User as follows:

Step 1 – Click 'User Management'

Step 2 – Click 'Create New User'



Step 3 – Fill in details of the User, assign username, permissions, level of access and assign account(s).

Create User

Contact Info

Title * ▼

First Name *

Last Name *

E-Mail *

Office phone number *

Mobile

Fax

Login Info

Username *

Permissions

Permission ▼ ← Assign role

Status Active

Financial data No Yes

Lyric account No Yes

Screener Tool Access No Yes

Remote Support Yes

Account Assignment

<input type="checkbox"/>	ACCOUNT NUMBER	ADDRESS
<input checked="" type="checkbox"/>	002XXXXXXXX	Manning Audiology Pty Ltd, TAREE
<input checked="" type="checkbox"/>	002XXXXXXXX	Manning Audiology - Harrington, HARRINGTON
<input checked="" type="checkbox"/>	0020 XXXXXXX	Manning Audiology - Tuncurry, TUNCURRY

← Assign permissions

← Assign account(s) to user

Permissions & Access

- Permission Level:** Give the User a role.
- Status:** Check the status as 'Active'
- Financial Data:** Check yes/no if User has access to see clinic pricing
- Lyric Account:** Check yes/no if User has access to a Lyric account
- Screeener Tool:** Check yes/no if User can access the eScreeener hearing test dashboard.
Please note: User must have Advanced Access to have this permission assignable.
- Remote Access:** Check yes/no if User can have access to Remote Support.
Please note: User must have Advanced Access to have this permission assignable.

Adding or Assign Other Clinic Accounts

Account Assignment: Add accounts or assign the new User to the account or multiple accounts for which they can access and place orders for. Check the relevant box.

Account Assignment	<input type="checkbox"/>	ACCOUNT NUMBER	ADDRESS
	<input checked="" type="checkbox"/>	002XXXXXXX	Manning Audiology Pty Ltd, TAREE
	<input checked="" type="checkbox"/>	002XXXXXXX	Manning Audiology - Harrington, HARRINGTON
	<input checked="" type="checkbox"/>	0020 XXXXXX	Manning Audiology - Tuncurry, TUNCURRY

Note: If you want to add a new clinic and add a new User to that new clinic, click 'Add' and add the new clinic, then check the box so the User has access to that clinics account.

Account Number :	<input type="text" value="0020 xxxxxxxx"/>	<input type="button" value="Add"/>
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Step 4 – Once the User has been created a pop up will notify that the User has been created and a green password activation link will appear in the password field.

Step 5 – Now click the green activation link to trigger and email which will be sent to the User to set their password.

The new user has been created

Login Info

User Name tester123

Password [Send link to activate the account](#)

Last Login Never

← Click this link to
send the new user
an activation link

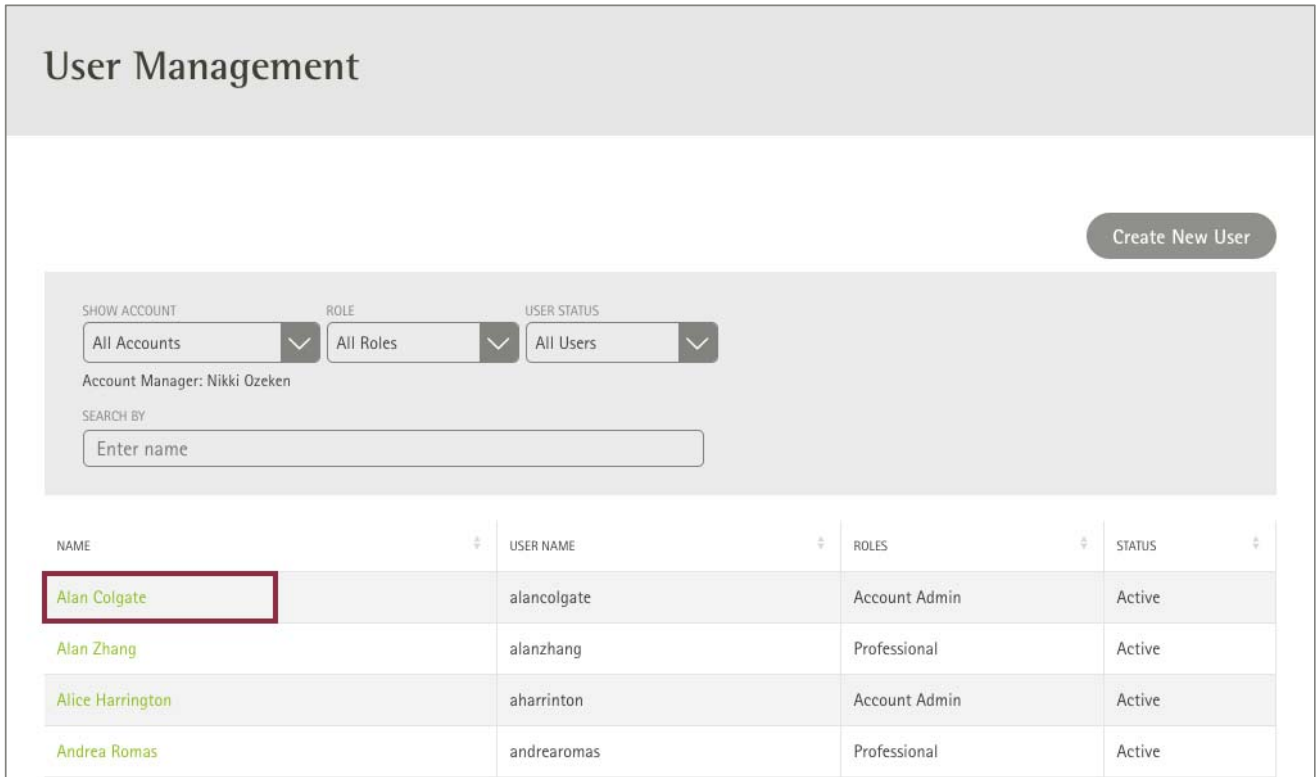
Once the new User receives their activation email, they have 14 days to activate their account before the link expires. If link expires the Account Manager/Admin will need to re-send an activation link.

Update or De-activate a User

Step 1 – Click 'User Management'



Step 2 – Click on the name of the User you would like to edit



Step 3a – Update the role or contact information

OR

Step 3b – De-activate the user

Please note that you are unable to delete a user.

Permissions

Permission	Basic Access	▼	← Edit role
Status	<input checked="" type="checkbox"/> Active		← Uncheck box to de-activate user
Financial data	<input checked="" type="radio"/> No	<input type="radio"/> Yes	
Remote Support	<input checked="" type="radio"/> No	<input type="radio"/> Yes	
Account Assignment	<input type="checkbox"/> ACCOUNT NUMBER	ADDRESS	
	<input checked="" type="checkbox"/> 0020073451	Phonak Australia, Norwest	

Contact Info

← Edit contact information (if required) then click 'Save'

Title *	Ms.	▼
First Name *	Andrea	
Last Name *	Romas	
E-Mail *	Andrea.romas@phonak.com	
Office phone number *	99999999	Ext.
Mobile		
Fax		

How to Update an Account Manager

1. Log into your main account>navigate to User management
2. Click into the Account Manager's account to edit the User's account (see below example)

3. Scroll down to the 'Permission' tab, select another role, then click 'Save'.

User Management

Create New User

SHOW ACCOUNT: All Accounts | ROLE: All Roles | USER STATUS: All Users

Account Manager: Nikki Ozeken

SEARCH BY: Enter name

NAME	USER NAME	ROLES	STATUS
Alan Colgate	alancolgate	Account Admin	Active
Alan Zhang	alanzhang	Professional	Active
Alice Harrington	aharrinton	Account Admin	Active
Andrea Romas	andrearomas	Professional	Active

Permissions

Permission: Account Manager

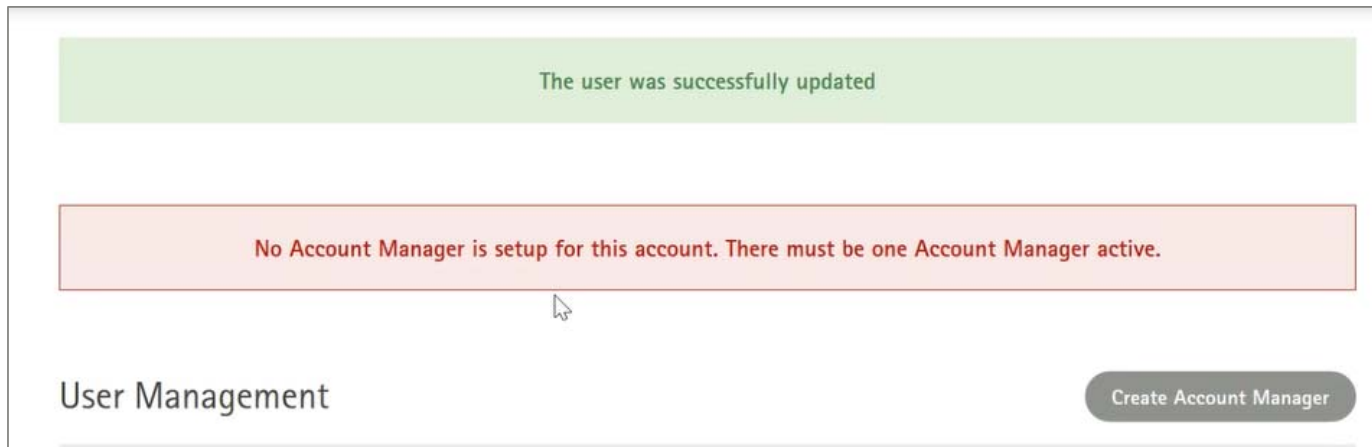
Status: Account Manager

Financial data: Account Admin

Lyric account: Professional

Viewer

The following message will appear:



4. Now select the User that you want to upgrade to Account Manager and repeat step 3 by selecting 'Account Manager' and click save.

Otherwise click the 'Create Account Manager' button and create a new User with Account Manager status.

Remote Support and eScreenener Access

All Account Manager's by default will have access to Remote Support and the eScreener tool.

Any other clinicians must have 'Advanced' access and Remote Support must be enabled in their User profile (see example).

If the Clinician does not have Advanced Access, they must either register for Advanced Access or have their existing Basic Access upgraded to Advanced Access & have Remote Support enabled.

To get started with eSolutions please contact your Sales Rep or Phonak Customer Service Agent for eSolutions starter kit.

Permissions

Permission	Account Manager ▼	
Status	<input checked="" type="checkbox"/> Active	
Financial data	<input type="radio"/> No	<input checked="" type="radio"/> Yes
Lyric account	<input checked="" type="radio"/> No	<input type="radio"/> Yes
Screener Tool Access	<input type="radio"/> No	<input checked="" type="radio"/> Yes
Remote Support	Yes	

Together,
we change lives