

STEP-BY-STEP GUIDE

for Connecting Petrosoft as a Scan File Manager on Altria Portal

HELP GUIDE



Description

This step-by-step guide outlines the process for companies seeking to provide access to **insightsc3m.com** for Petrosoft as a Scan File Manager.

Enabling this connection empowers Petrosoft representatives with direct access to ScanData report uploads, as well as lists of potential upload errors. By following this guide, organizations can seamlessly connect the data provider Petrosoft to **insightsc3m.com**, facilitating immediate access to crucial loading reports and error logs for efficient issue resolution.

Step 1

Visit the website insightsc3m.com and log in using your administrator credentials.



Please note that administrative rights are required to complete all the steps in this guide.

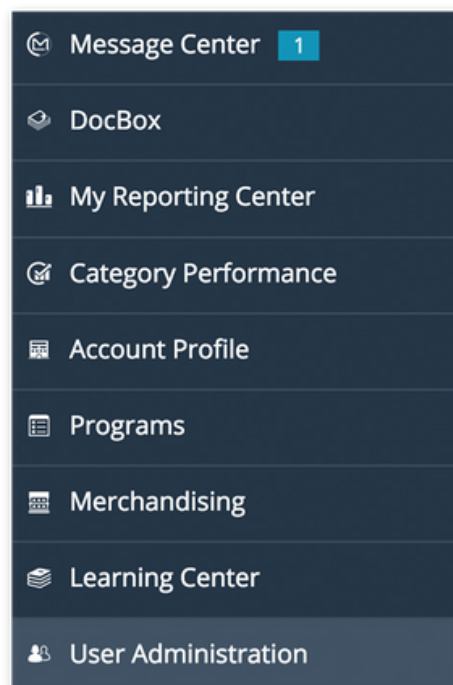
Step 2

Once logged in, navigate to the "**User Administration**" section. This section is found in the navigation menu.

How do I access User Administration?

Click **User Administration** on the left navigation menu.

Here you will find profiles for all your company employees with access to insightsc3m.com.



Step 3

Within the "User Administration" section, locate and click on the tab or option "Add New User" that allows you to create a new user.

Step 4

In the user creation form, fill in the required fields for the Petrosoft user with the following details:

Username: Petrosoft<Altria account number>
for example, *Petrosoft068999*

First Name: Petrosoft

Last Name: Petrosoft

Job Title: Data Provider

Retail Role: Scan File Manager

Email: scandata@petrosoftinc.com

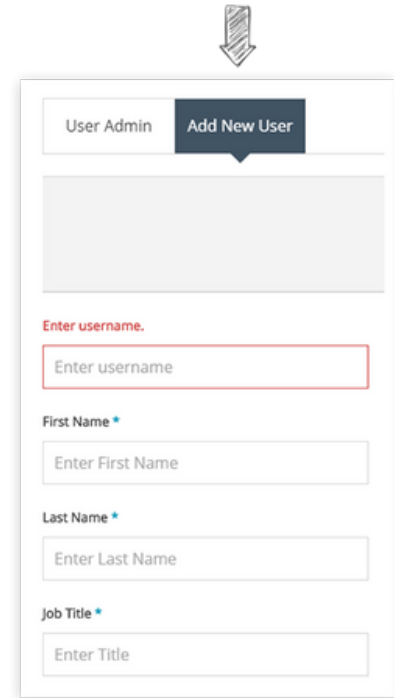
Then, click **NEXT**

Review the access permissions settings.

Do not grant access to DocBox.

Check the stores to which the Petrosoft user should have access (Chain Accounts Only)

Click Save. The new user will appear on the User Administration list.



Username Petrosoft068959

First Name *

Petrosoft

Last Name *

Petrosoft

Job Title *

Data Provider

Retail Role *

Scan File Manager

Email Address *

scandata@petrosoftinc.com

Access to the following Features

Docbox

Document Acknowledge

Authorized to sign agreements and consent for Third Party Providers or D

Document Reporting

Access to one of the following Retail/Management Account

068959 - PFMFC INC., MARION, AR (068959)