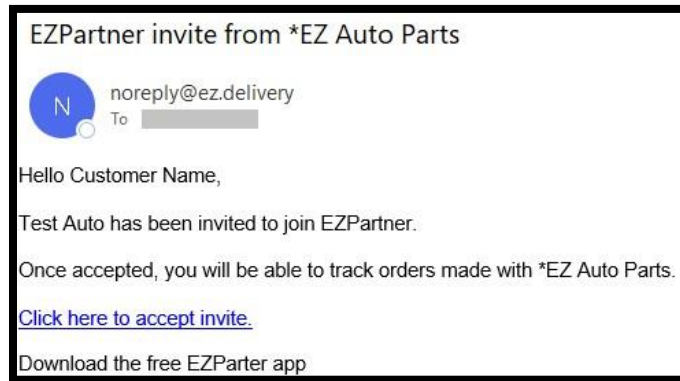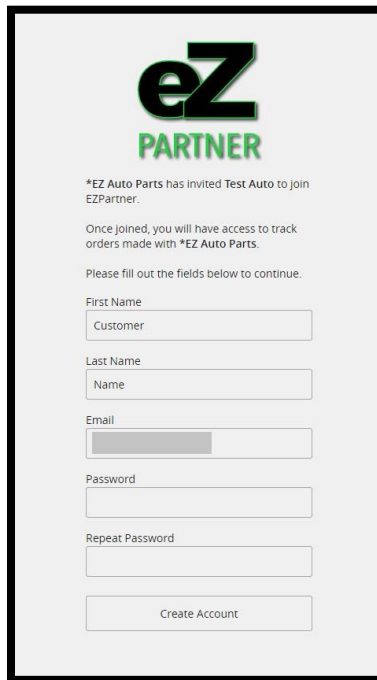# EZ Partner Training for the Customer

Using EZ Partner will allow you (the customer) to gain an extra level of transparency with your orders, while also saving time by optimizing communication. This tool is simple to use and will give you access to view your active orders, respond to questions about your orders and have the most current ETA always. EZ Partner is available online and in Google Play and the Apple App Store's.
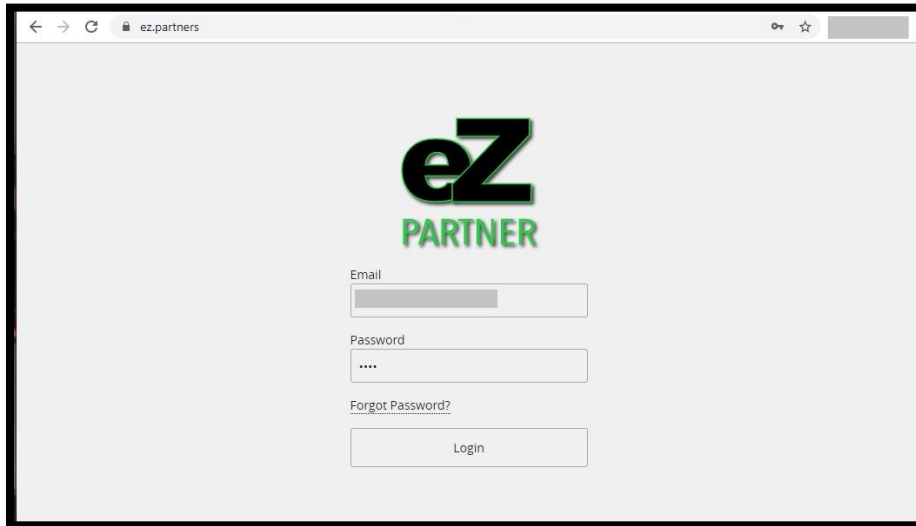
Getting Started

You will initially receive an email invite to join EZ Partner like the one shown below. You will need to select *"Click here to accept invite"* to prompt your user creation.

The user creation will have you input a First and Last Name and then create a password. The email will be auto filled with the email that received the invite.
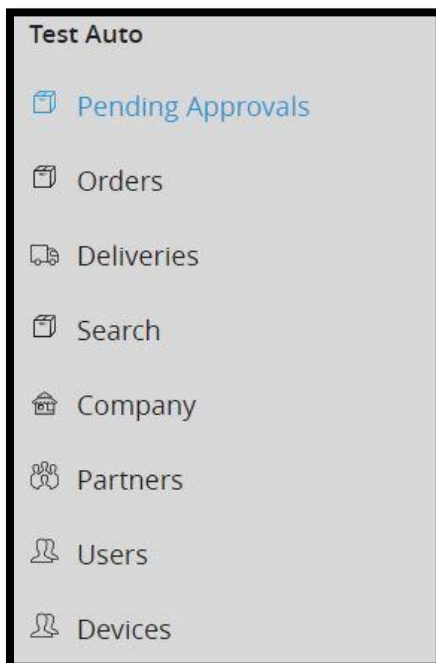
Once you create your account you will be free to log in to EZ Partner. You can do so online at EZ.Partners or by downloading the EZ Partner Mobile app in the Apple App Store and Google Play Store.

Navigating EZ Partner

Once you have created your account and logged in you will see a menu with different options regarding your orders from the linked EZ Partner.

Pending Approvals – Will alert you to any approvals on orders where the yard has sent you notes and photos so you can make the final call before processing is completed. This is a time sensitive matter and it is important that you continue to monitor *Pending Approvals* to quickly respond when one comes in.

Orders – Continually updates as yards process orders through EZ Suite. When an order is entered with your customer information it will be viewable here.

Deliveries – Will give you information regarding your incoming deliveries including the most up to date ETA.

Search – Allows users search for orders based off of the given specifc criteria.

Company – Displays your company name and information

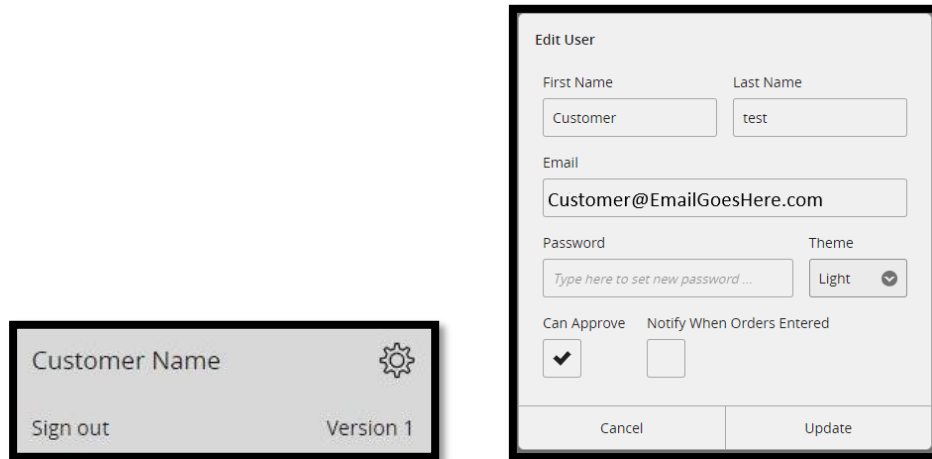**Partners** – Lists all of the yards which this EZ Partner account is linked to. Note that if multiple yards have asked you to join EZ Partner it is crucial they send the invite to the exact same email address you currently use to log in.

Users – Will allow you to invite more people from your company to join EZ Partner.

Devices – Allows you to control devices signed into your account in the EZ Partner App.
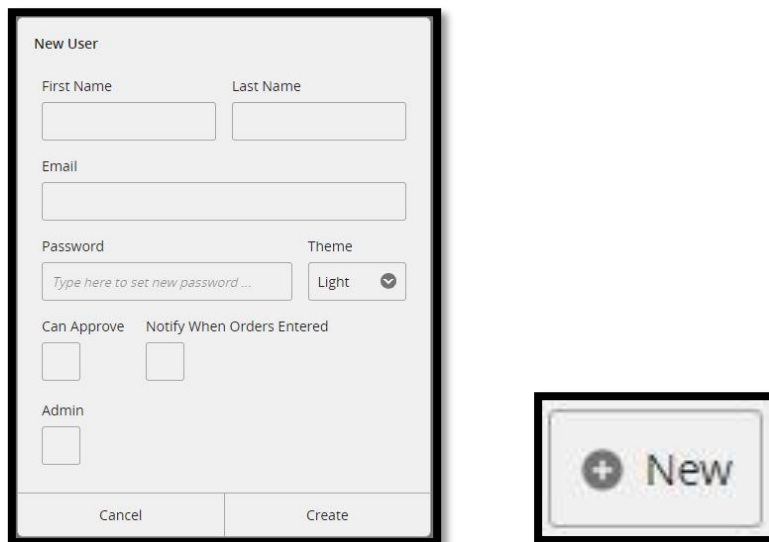
Adjusting Settings and Adding Users

In the bottom left the menu will also display your name, a settings wheel, *Sign Out*, and the current software version.

When you click on the settings wheel you will be able to edit your user. From here you can adjust your password and select light or dark mode. You will also be able to adjust the ability to approve pending orders and receive notifications when new orders enter in to EZ Partner.
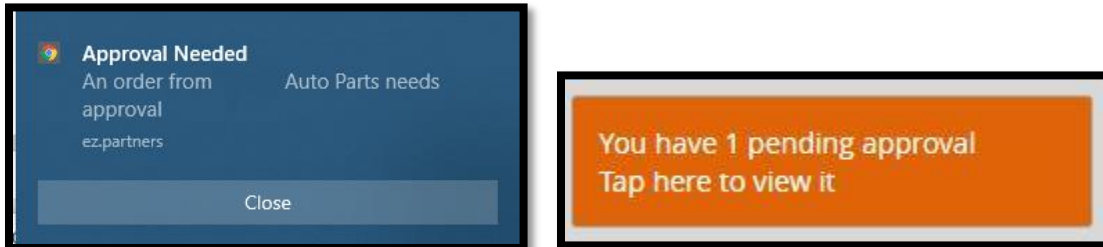
In the *Users* tab you can click on the *+New* button in the upper right-hand corner to create a new user. Simply fill out their First and Last Name and the email they will be using for a log in.

***Note** You can hit *Create* without filling in a password, this will send the user a welcome email like the one you received to join EZ Partner.

You can also adjust the user's approval permissions and notifications. There is also the option to make them an admin before creating their account.
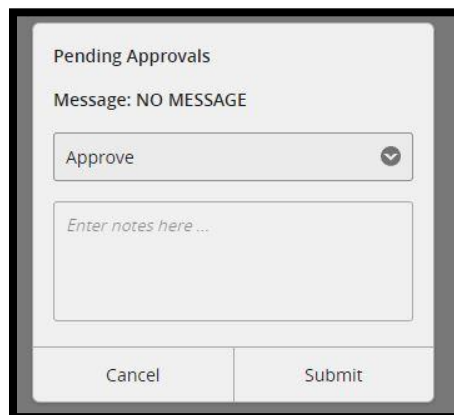
Resolving Pending Approvals

If there is any question over the quality of the part during processing the yard can request approval from you (the customer). When this happens you will receive a Windows notification and an orange box notification on ez.partners stating you have an order pending approval.

Once you are in the *Pending Approvals* tab you will see a list of orders needing approval. From here you will see links to *View Notes / Photos*, as well as *View Pending Approvals*.

Select *View Pending Approvals* to prompt their notes about the approval and allows you to *Approve* or *Deny* it.

-Click **Approve** to allow the part to continue processing to be sold.

-Click **Deny** stopping the order all together