Your account impersonation by TD SYNNEX staff

StreamOne® Ion

Introduction

To ensure our Sales teams can directly support Partners in their purchasing and platform management activities, we are releasing the capability for a Partner to allow their TD SYNNEX Sales representative to impersonate their account and act on their behalf for all the platform functions.

Following a simple process, Partners can now pick from three different levels of access to be used by their TD SYNNEX Sales representatives or simply not allow any activity on their behalf (Impersonation is disabled by default for Partners).

You will retain control over your account by choosing whether to allow TDSYNNEX account to impersonate or not; and controlling which actions can be done through impersonation.

Since users in a parent account can only impersonate accounts underneath them in the hierarchy, Impersonation further reinforces account hierarchy groupings based on geographic location and organization structures to ensure your TD SYNNEX representatives only have access to the data they need.

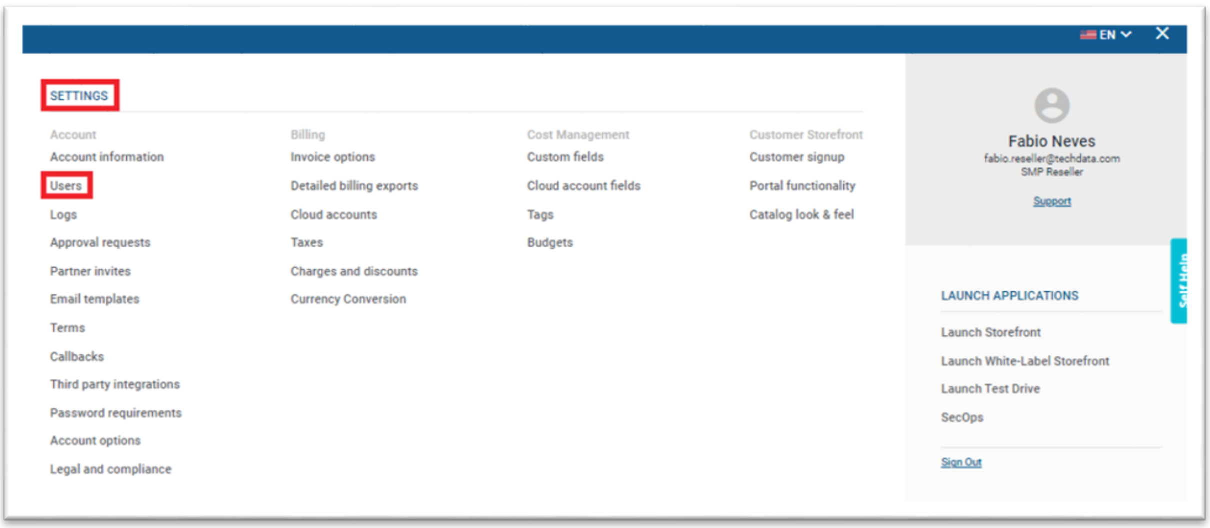
User Journeys

Partner Account Impersonation allows TD SYNNEX to be able to access your account to help with account management, day-to-day tasks, and more. Our suggestion is for Partners to create a new Admin account for this purpose, which will make sharing access and tracking changes easier to track. Please follow the steps described here below.

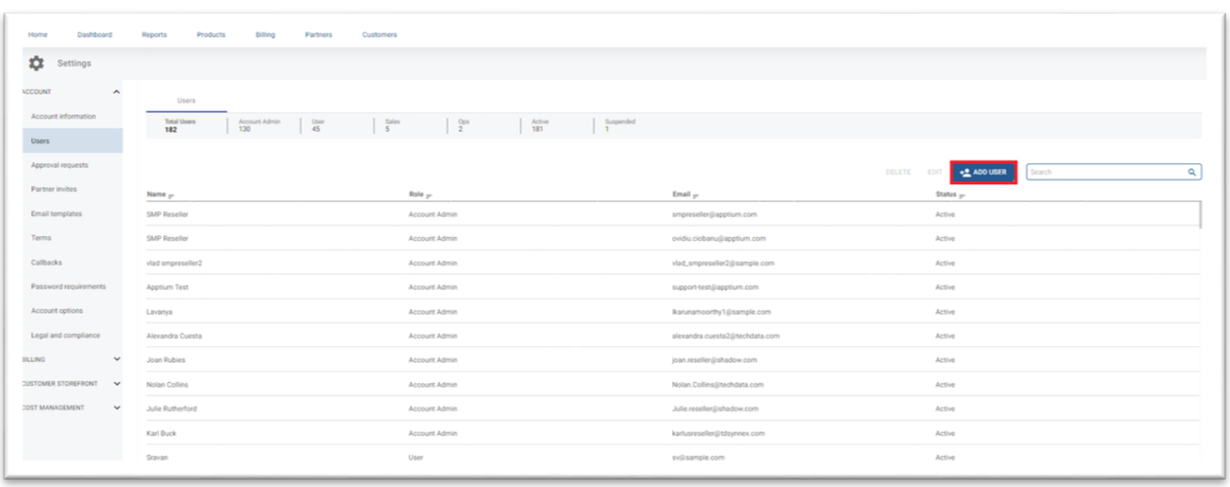
- How to create the Suggested TD SYNNEX admin user
- How to grant TD SYNNEX the ability to impersonate

How to create the Suggested TD SYNNEX admin user

1. From the options menu from the right top corner and under "Settings" go the option "Users".



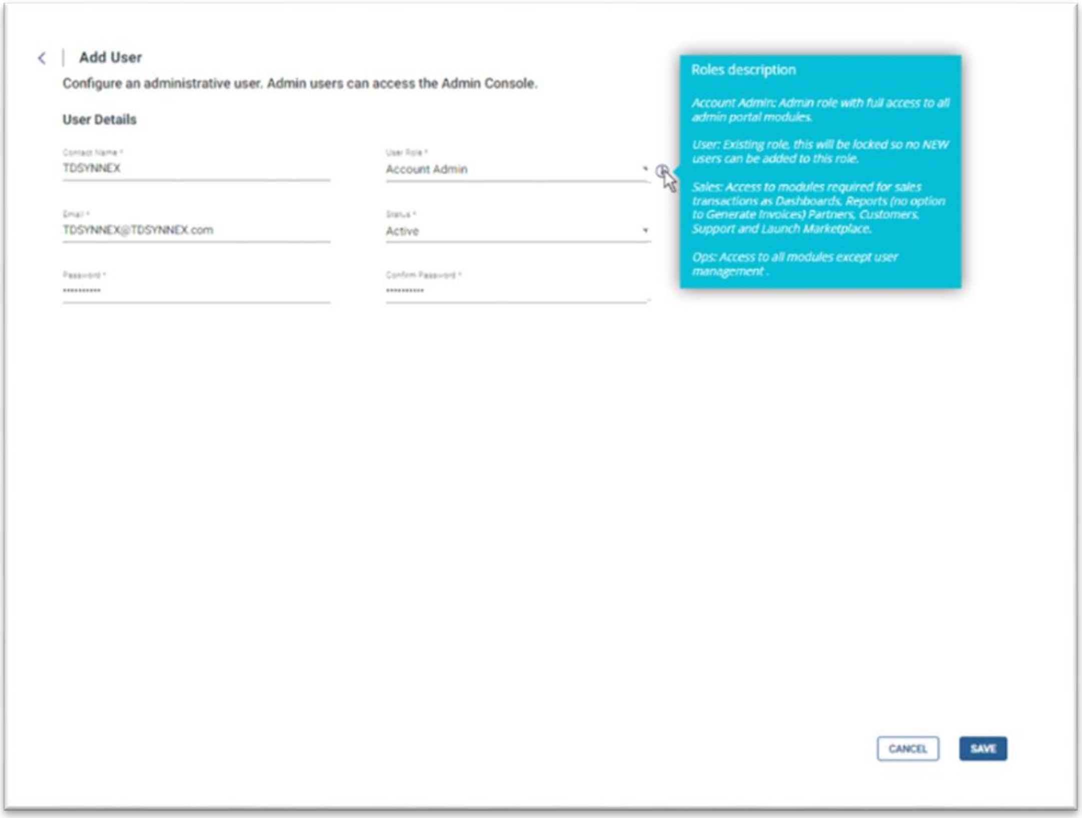
2. To add a new user, click on "Add User" option. The new roles are available for both new and existing users.



Now under the “Add User” options you can find the roles available (the new roles are available for both new and existing users), we suggest that you introduce the details as per image below,

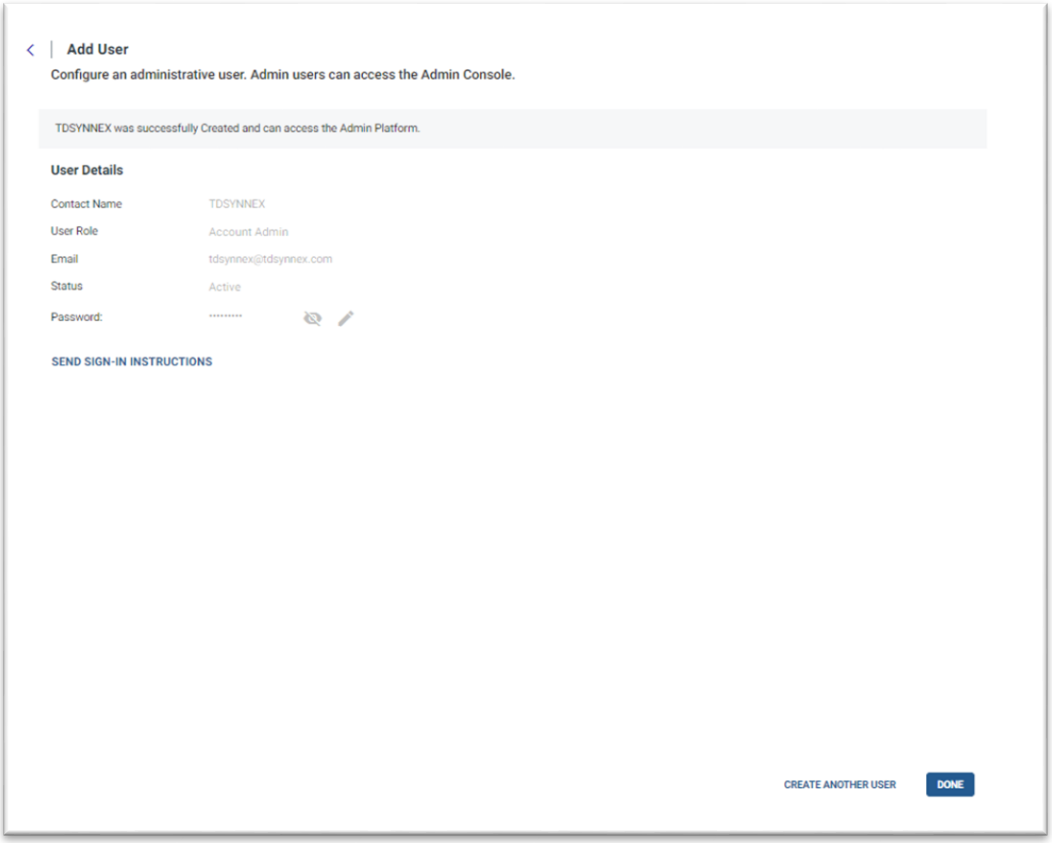
- Contact Name: We suggest you use TDSYNNEX to have a better view of which actions were performed when your account was impersonated.
- User Role: Next use the User Role Drop Down Menu to expand the list, which has a few new options that we’ll discuss later in this presentation. For our current purposes, we suggest you select “Account Admin” from the list, which will give your TD SYNNEX sales representative full permission to this account.
- Email: Under the email section, you can enter any email address not currently in the platform. For simplicity, we suggest entering your company name, “At” TD SYNNEX dot com.
    - Please note, this does not need to be an actual existing email address that you can receive emails from, and the suggested method is to help more easily identify this User Account, and any actions performed when the account was being impersonated. We suggest: company_name@TDSYNNEX.com or TDSYNNEX@company_Name.com, but can be any other email from you choice.
- Status: Please always select Active
- Password: And finally, enter a password and confirm that password. Since we will not be directly logging into this account, the password does not need to be specific or shared with your TD SYNNEX sales representative.

And after fulfilling all these fields as suggested, please click “Save”.



Note: Under the tooltip option you can see the roles along with a short description of permissions available to each of them.

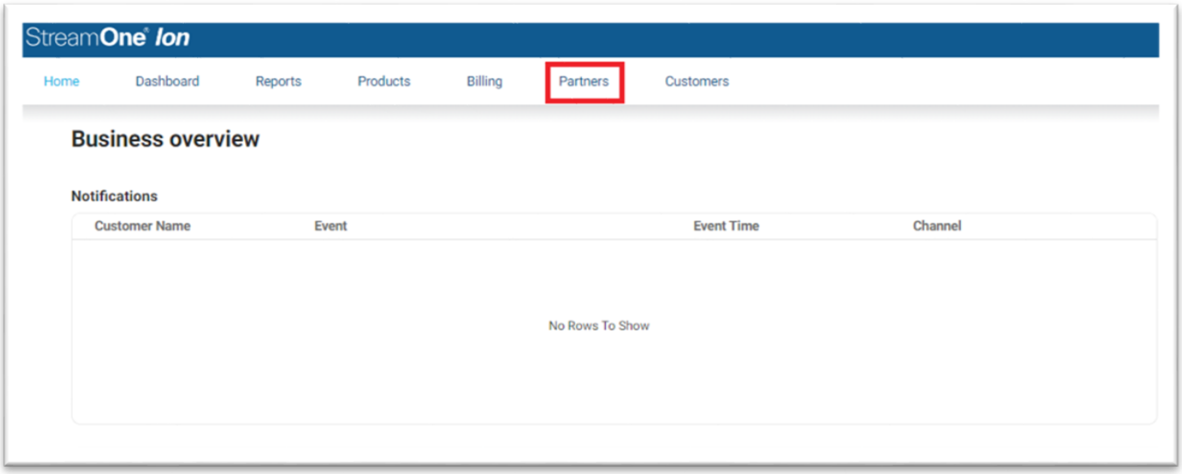
3. Once you finish the add user steps and click save, a summary of the user details will be displayed, with the contact's name, user role, email, status, and password, click in "Done" to finish the configuration of the user.



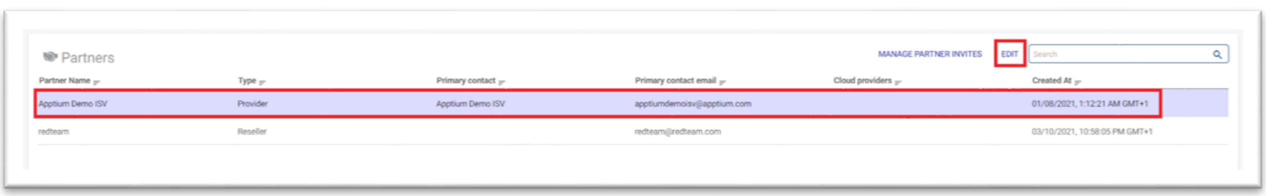
Note: This is just a suggestion to easily help you to manage your day-to-day tasks, bear in mind that you always can change the TDSYNNEX role (suggested Admin) for any other available and you can also turn off the impersonation option too at any time.

How to grant TD SYNNEX the ability to impersonate

1. Log into your account with your user and then press in the "Partners" option.

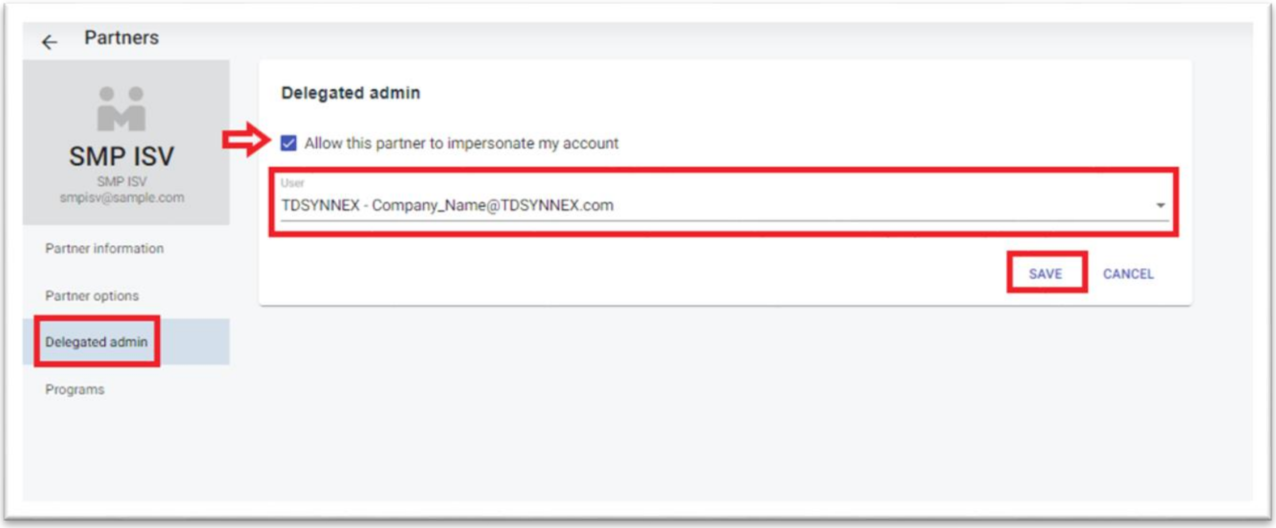


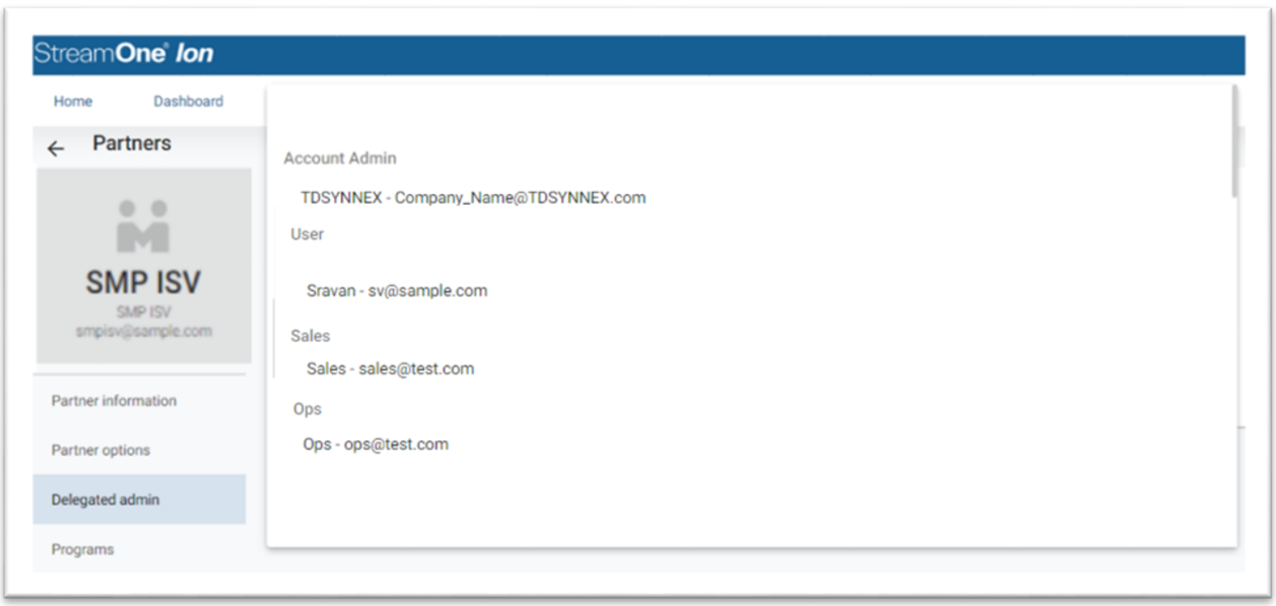
2. On the partners list click on the TD SYNNEX account that you want to give the impersonate option and click in "Edit" option.



3. On the partners option click on the "Delegated Admin" then click on the box "Allow this partner to impersonate my account". To specify a user for Delegated Access, browse the list of users. Options are displayed by Role and Search is available. The role associated with the user limits what actions can be taken by your parent account.

   Partner (TDSYNNEX) users with the ability to impersonate will have the same delegated Admin role defined by Partner. As discussed at the beginning of this document, to ensure we can help you better with your day-to-day tasks we suggest that you create a specific user for TD SYNNEX with Account Admin role so you can easily identify which actions were performed when your account was impersonated by a TD SYNNEX representative.





Note: This is just a suggestion to easily help you to manage your day-to-day tasks, bear in mind that you always can change the TDSYNNEX role (suggested Account Admin) for any other available and you can also turn off the impersonation option too at any time. Note that there are no notifications to your TD SYNNEX representatives when Delegated Admin is granted or removed by you.

Role-Based Permissions Per Role

Module	Component	Account Admin	User	Sales	OPS
Dashboard	N/A	Full Access	Full Access	Full Access	Full Access
Reports	Generate Invoice	Full Access	Full Access	No generate invoice	Full Access
Reports	All other report activities (view, download etc)	Full Access	Full Access	Full Access	Full Access
Products	N/A	Full Access	Full Access	No Access	Full Access
Partners (incl. Impersonation)	N/A	Full Access	Full Access	Full Access	Full Access
Customers	Customers Page	Full Access	Full Access	Full Access	Full Access
Customers	Customer360: Overview	Full Access	Full Access	Full Access	Full Access
Customers	Customer360: Products	Full Access	Full Access	Full Access	Full Access

Customers	Customer360: Customer Reports	Full Access	Full Access	Full Access	Full Access
Customers	Customer360: Customer Invoices	Full Access	Full Access	Full Access	Full Access
Customers	Customer360: General	Full Access	Full Access	Full Access	Full Access
Customers	Customer360: Cloud Billing	Full Access	Full Access	Full Access	Full Access
Customers	Customer360: Marketplace	Full Access	Full Access	Full Access	Full Access
Billing	Customer invoices	Full Access	Full Access	No Access	Full Access
Billing	Reseller invoices	Full Access	Full Access	No Access	Full Access
Billing	My invoices	Full Access	Full Access	No Access	Full Access
Billing	Legacy Reports	Full Access	Full Access	No Access	Full Access
Billing	Import Jobs	Full Access	Full Access	No Access	Full Access

Billing	Pricebooks	Full Access	Full Access	No Access	Full Access
Support	N/A	Full Access	Full Access	Full Access	Full Access
Marketplace	V3C	Full Access	Full Access	Full Access	Full Access
Marketplace (see above ^ note)	Customer Storefront	Full Access	Full Access	Full Access	Full Access
Settings	Account Information (req'd for all roles)	Full Access	Full Access	Full Access	Full Access
Settings	Account > Users (edit, add)	Full Access	No Access	No Access	No Access
Settings	Account Settings (all others)	Full Access	Full Access	No Access	Full Access
Settings	Billing	Full Access	Full Access	No Access	Full Access
Settings	Customer Storefront	Full Access	Full Access	No Access	Full Access

Settings	Cost Management	Full Access	Full Access	No Access	Full Access