STANDARD OPERATING PROCEDURE

How to control who sees what at your DSP.

Five steps that give every office user only the role their job needs, close logins the day people leave, put a name on every driver question, keep punches coming in before payday and put your own name on the product.

PORTALS	Admin Portal, General
ROLES	Owner, Sub Admin, Manager, Finance
HOW OFTEN	On hire, On exit, On change, Every pay period, Once
PAGES USED	Users, Roles & Permissions, Contacts, Connections, Company & Station
UPDATED	September 2026
READ ONLINE	ultimatedsp.com/knowledge/control-who-sees-what

What this SOP fixes

- Everyone in the office sees everything, including the money.
- A driver calls at 6am and nobody knows who answers.
- Punch times sit in Paycom, where dispatch cannot see them.
- The tool carries someone else's name, not yours.

> **How to use it:** read sections 1 to 6 once. Then run section 7 on the rhythm in section 6, and print the checklists in section 11 for the wall.

Contents

1. Purpose and scope

This SOP sets up who can see and change what in Ultimate DSP, and keeps it right as people come and go. Every office person gets their own login and only the role their job needs, leavers lose access the day they leave, every driver question has a named contact, the punch connection is checked before payday, and the product carries your company's name.

It is written for the owner and sub admin who run the Admin Portal, with notes for the manager, who can read most admin pages, and finance, who owns the punch connection.

This SOP covers

- Inviting office users and choosing their role.
- Removing a leaver's access.
- Driver contacts and the reasons they cover.
- The Paycom or ADP punch connection.
- Company name, logo and station details.

It does not cover

- Billing, plans and seats. Only the Owner changes them.

- Phone lines and the mailbox in Connections.
- Driver records and app invites. That is the SOP DA management.

2. Why this matters

In many DSP offices, everyone sees every screen, money included, and nobody knows who answers a driver's early call. Four gaps cause it:

THE PROBLEM	WHAT IT COSTS YOU
Everyone in the office sees everything, including the money	Pay and profit are open to people who do not need them.
A driver calls at 6am and nobody knows who answers	Calls go to whoever has a phone, and questions go unanswered.
Punch times sit in Paycom, where dispatch cannot see them	Late or missed punches are found at payroll, not on the day.
The tool carries someone else's name	Drivers and staff see a vendor instead of your company.

3. What good looks like

- Every office user has their own login and only the role their job needs.
- A leaver's login is deactivated the day they leave.
- Every driver question has a named person to call.
- The punch connection is checked before every payday.
- Your company name, logo and DSP code are on the product and its exports.
- Every office user sees only what their job needs.
- Nobody who has left can still sign in.
- Every driver question reaches the right person the first time.

4. Roles and responsibilities

ROLE	WHAT THEY OWN IN THIS SOP
Owner	Invites users, sets roles, deactivates leavers, transfers ownership, and manages billing and seats.
Sub Admin	Has the Owner's rights on Users, Contacts, Company & Station and Connections, but cannot give the Sub Admin role, change the owner or change billing.

ROLE	WHAT THEY OWN IN THIS SOP
Manager	Can read Contacts, Company & Station and Connections, and has no Users page.
Dispatcher (Operations)	Has no access to the Admin Portal.
Finance	Owns the Punch API tab in Connections, and has no other admin page.
Driver	Is never an office user, and sees contacts on the Help screen in Ultimate DA.

5. Before you start

Set these up once. Every step below assumes they are in place.

	TASK
☐	Choose a plan with enough seats for every office user. Driver app accounts do not use seats.
☐	Decide which role each office job gets before you invite anyone.
☐	Fill in Company & Station and upload your logo.
☐	Connect Paycom or ADP on the Punch API tab.
☐	Set up the station phone line in Connections, so drivers have one number to call.

6. The rhythm

When each part of the procedure happens, who does it and on which page.

WHEN	WHAT	WHO	WHERE
Once	Fill in Company & Station, connect punches, add contacts	Owner or Sub Admin	Company & Station, Connections, Contacts
On hire	Invite the person with the right role	Owner or Sub Admin	Users
On exit	Deactivate the login the same day	Owner or Sub Admin	Users
When cover changes	Update contacts and the reasons they cover	Owner or Sub Admin	Contacts

WHEN	WHAT	WHO	WHERE
Every pay period, before payday	Check the punch connection and test it	Owner or Finance	Connections

7. The procedure, step by step

Five steps: one on every hire, one on every exit, one whenever cover changes, one every pay period and one once. Most of the Admin Portal can only be changed by the Owner and Sub Admin.

1 Give each office person only the post their job needs

On hire

Where Admin Portal · Users **Who** Owner or Sub Admin

WHY THIS STEP MATTERS

When everyone sees everything, dispatch sees the money and anyone can change anything. One login per person, with only the pages their job needs, keeps the money with the people who own it and puts a name on every change.

HOW TO DO IT

1. Open the Admin Portal, then **Roles & Permissions**, to see what each role can open. Nothing there can be edited.
2. Open **Users** and click **+ Invite user**.
3. Enter the **Email**, **Full name** and **Mobile**, and pick the **Role**: Sub Admin, Manager, Operations or Finance.
4. Click **Send invite**. The invite goes to their email.
5. When someone changes jobs, open the menu on their row and click **Change role**.
6. Never share a login. Every office person gets their own.

WHAT TO CHECK

- Each person's role matches the job they do today.
- Only the people who own the money have Finance or Manager.
- Seats used is within your plan.

> **Done when:** The person shows on Users as Invited, then Active once they accept.

IF SOMETHING IS WRONG

- The toast says no seats left: add seats on Billing & Subscription. Only the Owner can.
- The toast says that email already has a row: the person worked here before. Reactivate their row instead of inviting them again.

- Owner is not in the role list: ownership only moves with Transfer ownership, which only the Owner can do.
- You want someone to see one extra page: roles cannot be edited or mixed. Change their role instead.

KEEP A RECORD

Every role change is audited, and each user's last active time shows on their row.

2 Remove a leaver's login the day they leave

On exit

Where Admin Portal · Users **Who** Owner or Sub Admin

WHY THIS STEP MATTERS

A leaver with a working login can still open driver records, pay and money pages. Deactivating on the day closes that door, and keeps the history of what they did while they worked for you.

HOW TO DO IT

1. Open **Users**, search the person by name or email, and open the menu on their row.
2. Click **Deactivate**. Use **Remove user** only for an account created by mistake that has no history.
3. If the Owner is leaving, use **Transfer ownership** first: pick the new owner and type their email to confirm.
4. For a driver, use **Revoke access** on the Ultimate DA tab only to drop their app link while they stay on the roster.
5. Also remove the person from Amazon's DSP portal, and collect any badge and equipment.

WHAT TO CHECK

- The row reads Deactivated.
- Seats used dropped.
- Their Amazon logins are closed too.

> **Done when:** The row shows Deactivated, and Seats used drops by one.

IF SOMETHING IS WRONG

- **Remove user** is disabled: the account has history that must be kept. Deactivate instead.
- The Owner's row cannot be deactivated: only the account owner can change the owner. Transfer ownership first.
- The person comes back: **Reactivate** their row instead of inviting them again.
- An invite nobody accepted still holds a seat: remove it with **Remove user**.

KEEP A RECORD

A deactivated row keeps its role and its history, and deactivating an office user never touches the driver roster.

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3 Put a name on every driver question: pay, van, route

On change

Where Admin Portal · Contacts **Who** Owner or Sub Admin

WHY THIS STEP MATTERS

A driver with a pay question at 6am calls whoever they have a number for, and nobody knows who should answer. A named contact for each reason sends the call to the right person the first time.

HOW TO DO IT

1. Open the Admin Portal, then **Contacts**, and click **+ Add contact**.
2. Fill in **Who**, the **Job title** and the **Phone**.
3. Under **Reasons**, pick every reason this contact covers. Type a new reason if you need one.
4. Keep **Shown in the app** on, then click **Add contact**. A new contact is added last in the order.
5. Mark the urgent reasons, such as an accident or an injury, so they pin to the top of the Help screen.

WHAT TO CHECK

- No reason shows as uncovered.
- Every contact's phone number works.
- Pay questions go to the person who owns pay.

> **Done when:** Every reason drivers need is covered by at least one shown contact.

IF SOMETHING IS WRONG

- Filtering by a reason shows that nobody covers it: drivers never see that reason. Add a contact for it.
- A contact is hidden: drivers lose their reasons unless someone else covers them. Show the contact, or add another.
- You have no contacts yet: the drivers' Help screen offers only the station line.
- A reason name is wrong: rename it, and it renames on every contact that holds it.

KEEP A RECORD

Contacts need no login or seat, and a job title gives no access. Calls drivers make from Help go from their own phone and are not logged in Inbox.

4 Check the punch connection is live before payday

Every pay period

Where Admin Portal · Connections **Who** Owner or Finance

WHY THIS STEP MATTERS

Punch times sit in Paycom or ADP, where dispatch cannot see them. When the connection stops, compliance and timecards lose worked hours and overtime without blocking anything, and you find out when payroll does not add up.

HOW TO DO IT

1. Open the Admin Portal, then **Connections**, and the **Punch API** tab.
2. Check the provider, **Paycom** or **ADP**, and that the status reads connected.
3. Read **Last sync**, and check the refresh interval, such as **Every 15 min**.
4. Click **Test connection**. It only reads, and changes nothing.
5. If it fails, re-enter the **Client ID** and **API key**, and check the **Environment**.
6. Then pull the pay period's regular and overtime hours in payroll, review the summary and submit.

WHAT TO CHECK

- The status reads connected.
- Last sync is from today.
- Timecards show worked hours, not a dash.

> **Done when:** The tab reads connected, the last sync is recent, and Test connection passes.

IF SOMETHING IS WRONG

- The status reads not connected: punch times still arrive from the Compliance file import, but worked hours and overtime do not.
- The API key shows as dots: it is write-only. Paste a new key to replace it.
- You switched between Paycom and ADP: the old credentials are discarded, so enter the new ones.
- Timecards show a dash for worked hours: the connection is not bringing punches in yet.

KEEP A RECORD

The connection shows who connected it and when. Punches never create a driver and carry no pay amounts.

5 Put your company name and logo on every export

Once

Where Admin Portal · Company & Station **Who** Owner or Sub Admin

WHY THIS STEP MATTERS

Drivers work for your company, not for Amazon and not for a software vendor. When the product, the driver app and your documents carry your own name, drivers and staff see one company.

HOW TO DO IT

1. Open the Admin Portal, then **Company & Station**.
2. In Company, enter your **Legal name** exactly as it is on your legal documents, your **DSP code**, **Support email**, **Support phone** and **Address**.
3. In Branding, set the **Display name**, an optional **Slogan** for the driver app, and your **Brand color**.
4. Click **Upload logo** and add a PNG or SVG file.
5. In Station, check the **Station name**, **Station code**, **Station address** and **Time zone**.
6. Check the live preview of the rail and the top bar.

WHAT TO CHECK

- The live preview shows your display name and color.
- The legal name matches your legal documents exactly.
- The time zone is the station's.

> **Done when:** The top bar shows your display name, the icon rail shows your brand color, and the next export carries your DSP code.

IF SOMETHING IS WRONG

- The display name is cut short: it takes up to 20 characters. Use a shorter name.
- You changed the time zone: every time on screen changes to match, and nothing stored moves.
- No logo is uploaded: the display name's first letter shows instead.
- Ultimate DSP does not check the DSP code against Amazon: type it exactly as Amazon has it.

KEEP A RECORD

Every change is audited, and a new logo restyles exports from the next one generated.

8. The three numbers to watch

Read these numbers on the cadence in the rhythm table. Each one tells you whether the procedure is working.

NUMBER	WHAT IT TELLS YOU	ACT WHEN
Seats used	Active and invited office users against the seats on your plan.	It is at the cap: remove invites nobody will accept before buying seats.
Not invited	Active drivers on the roster with no Ultimate DA account, on the Ultimate DA tab.	It is above zero: invite them, or they cannot take surveys or acknowledge coaching.
Last sync	When punches last came in from Paycom or ADP, on the Punch API tab.	It is not from today: click Test connection before payroll runs.

9. Common mistakes

MISTAKE	WHY IT HURTS	DO THIS INSTEAD
Sharing one office login.	Nobody knows who changed what, and a leaver keeps access.	Invite each person with their own email.
Giving everyone Manager.	Dispatch sees the money.	Give Operations to dispatch and Finance to the money.
Leaving a leaver's login active.	They can still open driver records and pay.	Deactivate them the day they leave.
Removing users who have history.	That history may be what you need later.	Deactivate. Remove only mistakes with no history.
Leaving driver reasons uncovered.	Drivers call whoever they have a number for.	Add a contact for every reason.
Finding out at payroll that punches stopped.	Worked hours and overtime are missing.	Test the connection before every payday.

10. When to escalate

- Someone needs a page their role does not open: the owner decides whether to change their role.
- A leaver's login was not deactivated on the day: the owner deactivates it at once.
- The punch connection fails before payday: finance re-enters the credentials, and tells the owner if it still fails.

- A driver question has no contact: the owner names someone the same day.

11. Printable checklists

Print this page and pin it where the work happens. Tick each line and initial it. Keep the sheet with the day's records.

On hire and exit

Date or week of: ____________________ Checked by: ____________________

	TASK	DONE BY
☐	New person invited with their own email	
☐	Role matches the job	
☐	Leaver deactivated the same day	
☐	Leaver removed from Amazon's portal	
☐	Badge and equipment collected	

Every pay period

Date or week of: ____________________ Checked by: ____________________

	TASK	DONE BY
☐	Punch API reads connected	
☐	Last sync is from today	
☐	Test connection passes	
☐	Timecards show worked hours	

12. Terms used in this SOP

TERM	MEANING
Role	What an office user's job lets them open: Owner, Sub Admin, Manager, Operations or Finance.
Owner	The one account owner. Ownership moves only with Transfer ownership.

TERM	MEANING
Sub Admin	The Owner's rights, minus changing the owner, transferring ownership and changing billing.
Operations	The role for dispatch: the day's work, drivers, fleet and Inbox, with no money pages.
Seat	One active or invited office user on your plan.
Deactivate	Stops sign-in and frees the seat, and keeps the row and its history.
Contact	A person, desk or company drivers can call. Not a user.
Reason	A kind of driver question on the Help screen. Urgent reasons pin to the top.
Punch API	The Paycom or ADP connection that brings punches in.
DSP code	Your DSP's short code, stamped into export file names.
Display name	Your company name in the top bar and on the driver app.

13. Related SOPs

- DA management: ultimatedsp.com/knowledge/da-management
- Communication hub: ultimatedsp.com/knowledge/communication-hub
- Overtime and compliance: ultimatedsp.com/knowledge/overtime-and-compliance

About this SOP

Written by an Amazon DSP that runs these procedures every day, using the pages of Ultimate DSP. Amazon's program policies, your DSP agreement and the law come first: where they differ from this SOP, follow them. Page names and on-screen labels match Ultimate DSP as of September 2026. The latest version is online at ultimatedsp.com/knowledge/control-who-sees-what.