

2012

Reseller Portal Quick Guide



Matthew Humphreys

Market Analyst Software Pty Ltd

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With the release of Market Analyst 7, our Reseller Portal has been redesigned to provide more information, and easier processing of the most common tasks the portal us used for.

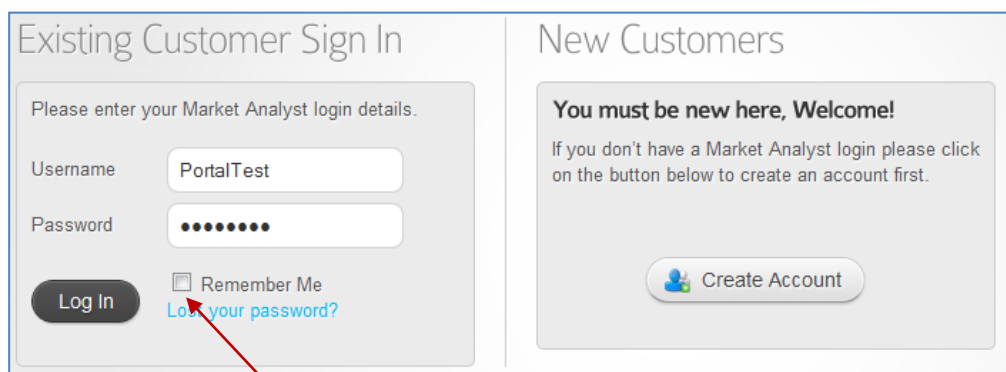
This Quick Guide will take you through each page, giving an overview of the features available to you. Once you're using the Portal, you will find most sections contain their own Help icon, which you can refer to for additional information.

Logging In

The Reseller Portal is accessed via your web browser, using the following link:

<https://portal.market-analyst.com/myaccount>

Your login details for this page are identical to your Market Analyst program login.

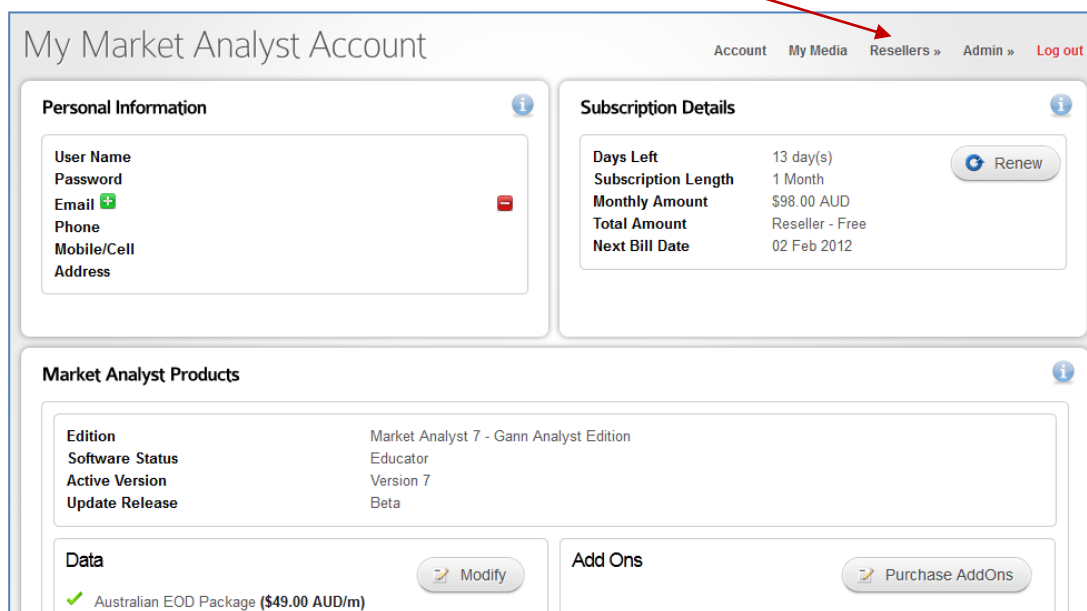


The screenshot shows a login interface with two main sections: 'Existing Customer Sign In' and 'New Customers'. The 'Existing Customer Sign In' section contains a form with fields for 'Username' (containing 'PortalTest') and 'Password' (masked with dots). Below the password field is a 'Remember Me' checkbox and a 'Log In' button. A red arrow points to the 'Remember Me' checkbox. A link 'Lost your password?' is also visible. The 'New Customers' section has a heading 'You must be new here, Welcome!' and a message: 'If you don't have a Market Analyst login please click on the button below to create an account first.' Below this is a 'Create Account' button.

You can tick the **Remember Me** checkbox to automatically login to the Reseller Portal the next time.

Reseller Functions

Once you have logged into your account, a summary page will display. Access to the Reseller functions of this page are accessed via the top right corner **Resellers** menu



The screenshot shows the 'My Market Analyst Account' dashboard. At the top right, there is a navigation menu with 'Account', 'My Media', 'Resellers', 'Admin', and 'Log out'. A red arrow points to the 'Resellers' menu item. The dashboard is divided into several sections: 'Personal Information' (with fields for User Name, Password, Email, Phone, Mobile/Cell, and Address), 'Subscription Details' (showing Days Left: 13 day(s), Subscription Length: 1 Month, Monthly Amount: \$98.00 AUD, Total Amount: Reseller - Free, and Next Bill Date: 02 Feb 2012), and 'Market Analyst Products' (showing Edition: Market Analyst 7 - Gann Analyst Edition, Software Status: Educator, Active Version: Version 7, and Update Release: Beta). At the bottom, there is a 'Data' section showing 'Australian EOD Package (\$49.00 AUD/m)' and an 'Add Ons' section with a 'Purchase AddOns' button.

There are 3 options listed under the Resellers menu:

1. **New Clients** – used to process new client orders / subscriptions.
2. **List New Clients** – displays a list of the 200 most recent orders processed via the Reseller Portal.
3. **Tool Management** – used to enable / disable a tool, tool group specific to your account. You can also view a list of clients who have the tool(s) enabled on their account.

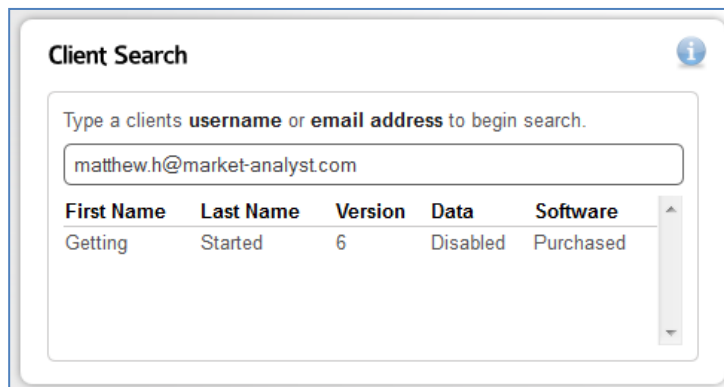
New Clients

The New Clients window is used to process new client orders / subscriptions and is broken up into 5 sections.

Client Search

If you believe a new client may already have a record in the Market Analyst data based (from a trial, etc), you can search for their details using either their Market Analyst program username, or email address.

If a match is found it will display under the Search window:



The screenshot shows a 'Client Search' window with an information icon in the top right. Below the title is a search instruction: 'Type a clients **username** or **email address** to begin search.' A search input field contains the text 'matthew.h@market-analyst.com'. Below the input field is a table with the following data:

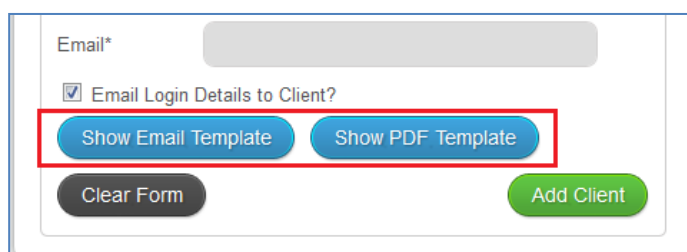
First Name	Last Name	Version	Data	Software
Getting	Started	6	Disabled	Purchased

Left clicking on the match displayed under the search window will auto-fill their recorded details into the **Client Information** section below.

Client Information

This section is used to enter new clients details into the Market Analyst system. Items like First Name, Last Name, etc. Any detail which is a required field will be marked with an asterisk.

At the bottom of the Client Information section are the **Show Email Template** and **Show PDF Template** buttons. These buttons will give you a preview of the email / email attachment the client will receive once the order has been processed.

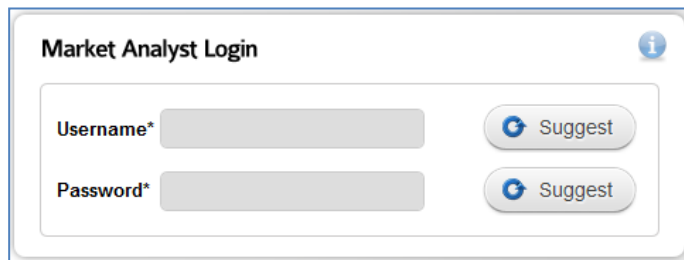


The screenshot shows the 'Client Information' form. It includes an 'Email*' field with a greyed-out input box. Below it is a checked checkbox labeled 'Email Login Details to Client?'. Two buttons, 'Show Email Template' and 'Show PDF Template', are highlighted with a red box. At the bottom are 'Clear Form' and 'Add Client' buttons.

Once all information has been entered, clicking the **Add Client** button will process the order.

Market Analyst Login

This section is used to generate a Username and Password for the new client to use, to login to Market Analyst.

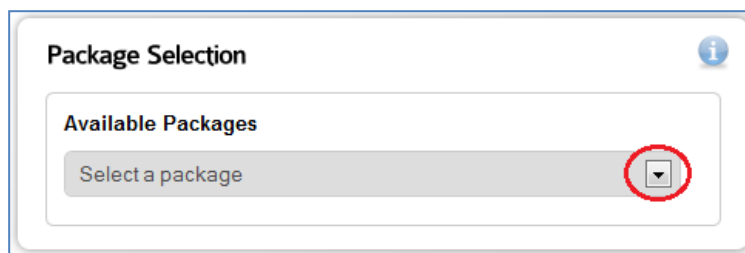


The image shows a 'Market Analyst Login' form. It has a title bar with an information icon. Below the title, there are two input fields: 'Username*' and 'Password*'. To the right of each input field is a 'Suggest' button with a circular arrow icon.

You can either enter the details in manually, or click the **Suggest** buttons to generate these items automatically.

Package Selection

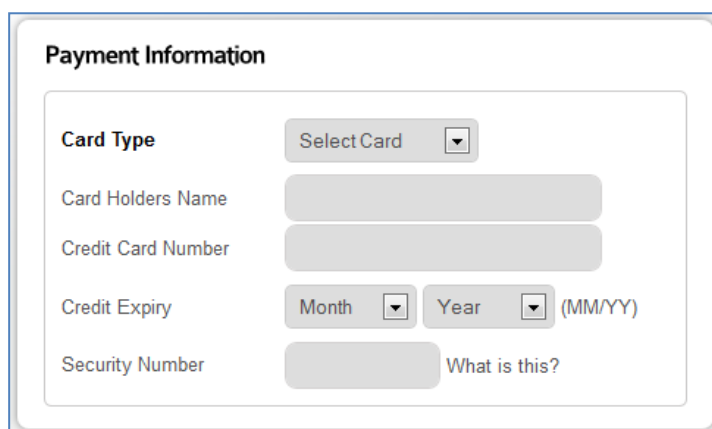
All packages available on your account are listed in this section's drop down window including any specials you may be running at the time.



The image shows a 'Package Selection' form. It has a title bar with an information icon. Below the title, there is a section titled 'Available Packages'. Inside this section, there is a dropdown menu with the text 'Select a package' and a downward arrow icon. The dropdown menu is circled in red.

Payment Information

If the package you've selected is to be paid by the new client directly, a new section called Payment Information will display. This section is used to enter the new client's Credit Card details into the Market Analyst system, to be used to process the order. (AMEX[®] is only available for AUD transactions and will incur a surcharge of 2.75%)

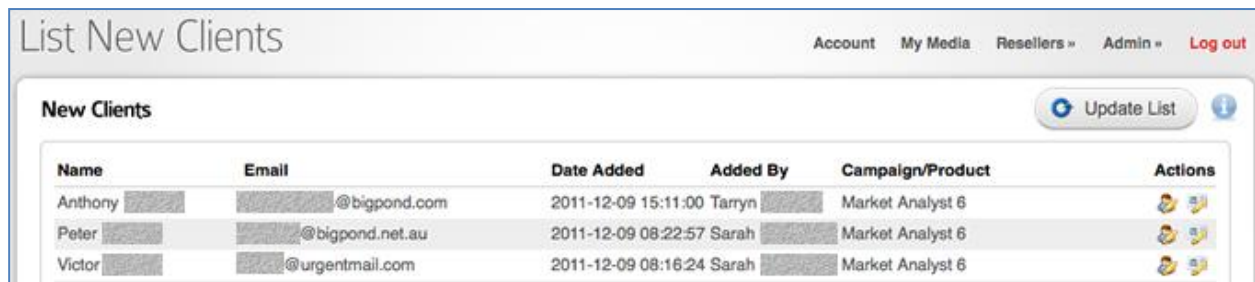


The image shows a 'Payment Information' form. It has a title bar with an information icon. Below the title, there are several input fields: 'Card Type' with a 'Select Card' dropdown menu, 'Card Holders Name' with a text input field, 'Credit Card Number' with a text input field, 'Credit Expiry' with 'Month' and 'Year' dropdown menus and '(MM/YY)' text, and 'Security Number' with a text input field and a 'What is this?' link.







Note: If a credit card is rejected during the order process, you'll receive notice of the problem within a few minutes. A clients record will not be setup with Market Analyst access until the order has been successfully processed. If a problem is encountered and you have any questions, please call or email your Market Analyst Account Manager.

List New Clients


This table displays a list of the last 200 clients you have processed via the Reseller Portal. There are two actions available for each client record.

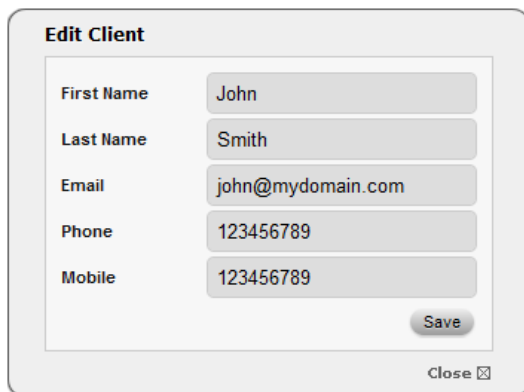


The screenshot shows a web interface titled "List New Clients". At the top right, there are navigation links: "Account", "My Media", "Resellers »", "Admin »", and "Log out". Below the title, there is a "New Clients" section with an "Update List" button. The main content is a table with the following columns: Name, Email, Date Added, Added By, Campaign/Product, and Actions. The table contains three rows of client data.

Name	Email	Date Added	Added By	Campaign/Product	Actions
Anthony	@bigpond.com	2011-12-09 15:11:00	Tarryn	Market Analyst 6	 
Peter	@bigpond.net.au	2011-12-09 08:22:57	Sarah	Market Analyst 6	 
Victor	@urgentmail.com	2011-12-09 08:16:24	Sarah	Market Analyst 6	 

Adjusting Contact Details


If the client provides you with updated Phone or Email details, you can click the  icon to add the updated information.



The screenshot shows a form titled "Edit Client". It has five input fields: "First Name" (John), "Last Name" (Smith), "Email" (john@mydomain.com), "Phone" (123456789), and "Mobile" (123456789). There is a "Save" button at the bottom right and a "Close" button with a small icon at the bottom left.

Click the **Save** button to update the clients account with the new details.

Reset Clients Username and Password

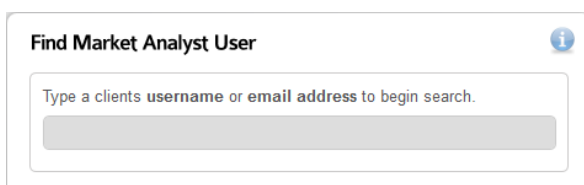
If the client has not received their original installation emails, or they have lost their login details you can reset and re-send the login information by clicking the  icon.

Tool Management

The tool management window is broken up into 3 sections...

Market Analyst Users

If you know the Username or Email Address of the client you wish to add / remove a tool group to, you can enter the details here. The table will update to show any matching records.



The screenshot shows a search form titled "Find Market Analyst User". It has a text input field with the placeholder text "Type a clients username or email address to begin search." and a search button with a magnifying glass icon.

Note: Adding a tool group to a clients record using the **Tool Management** page will not invoice the client. If the tool group you're adding involves a cost, you need to add the tool group using the **New Subscription** section, or, direct the client to the **Add-Ons** page of the Market Analyst Online Store.

Tool Group

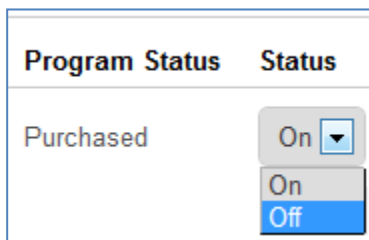
Located in this section will be a drop down list of all tool groups you can add / remove to a clients record.



Located to the right of the drop down list will be a counter, showing the number of records which currently have the tool group enabled.

Client List

A table is displayed in this section, showing all client accounts which currently have the selected tool group enabled. Username, Name, Email and Phone contact details are displayed, along with a Status Drop down list.



You can remove access to the tool group by clicking on the Drop Down list and selecting the **Off** option.

Page Controls

Number Per Page: 100 Show

Number Per Page: Lets you set the number of rows displayed on each page of the client table.

Show: If you adjust the number of rows displayed on each page, clicking the Show button will update the table.

Prev Next

Prev: Go to the previous page of the client table.

Next: Go to the next page of the client table.

1 / 7 Jump

Jump: You can manually enter the page number you wish to view, and press the Jump button to update the client table.