2012

Reseller Portal Quick Guide

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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.

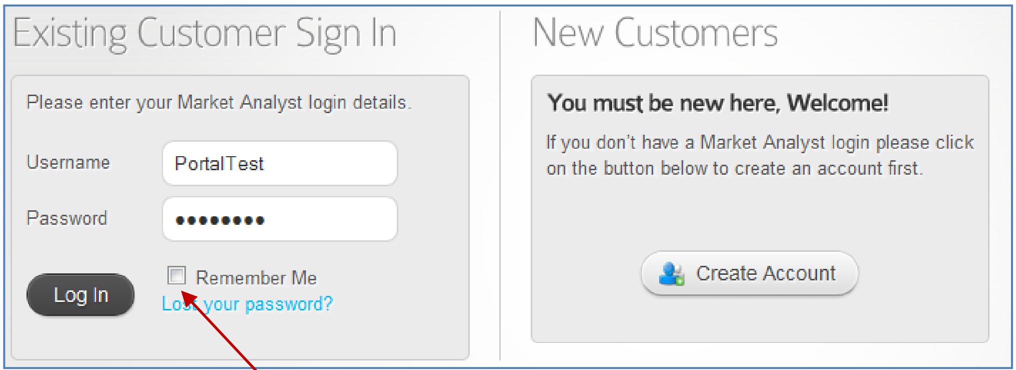
This Quick Guide will take you through each page, giving an overview of the features available to you. Once you're using the Portal, you will find most sections contain their own Help icon, which you can refer to for additional information.

Logging In

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

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

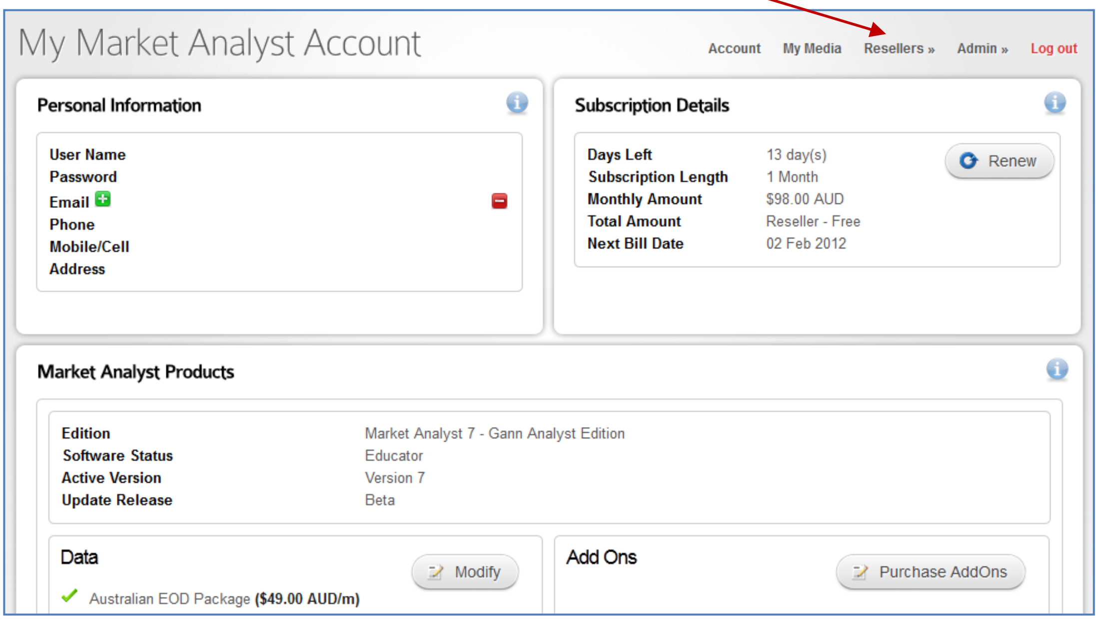
Your login details for this page are identical to your Market Analyst program login.



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



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.

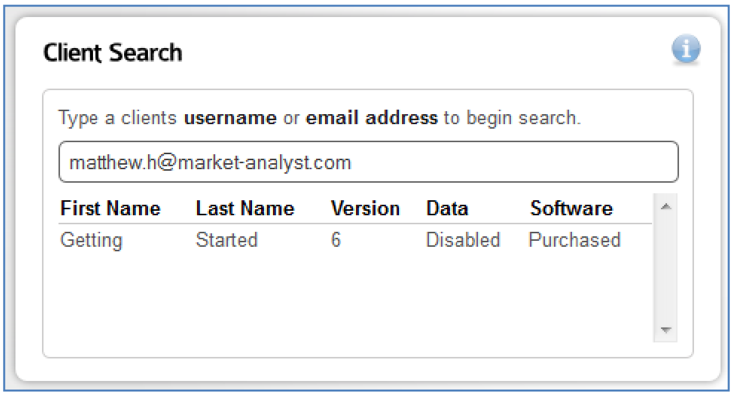
New Clients

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:

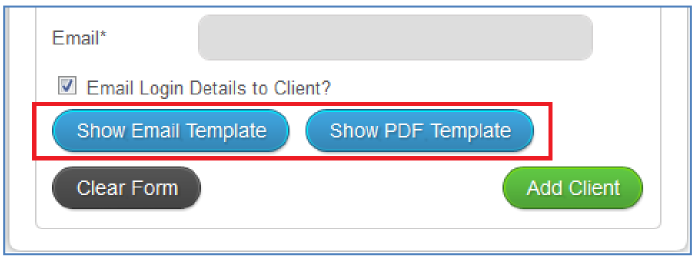


Left clicking on the match displayed under the search window will auto-fill their recorded details into the **Client Information** section below.

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.

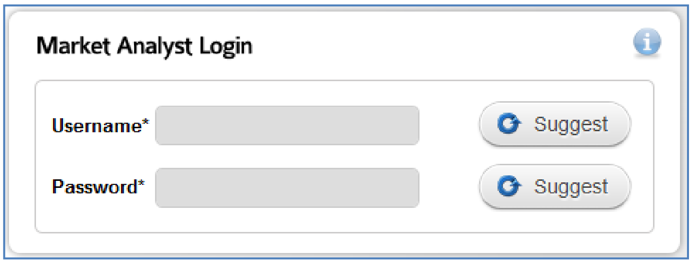
At the bottom of the Client Information section are the **Show Email Template** and **Show PDF Template** buttons. These buttons will give you a preview of the email / email attachment the client will receive once the order has been processed.



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.



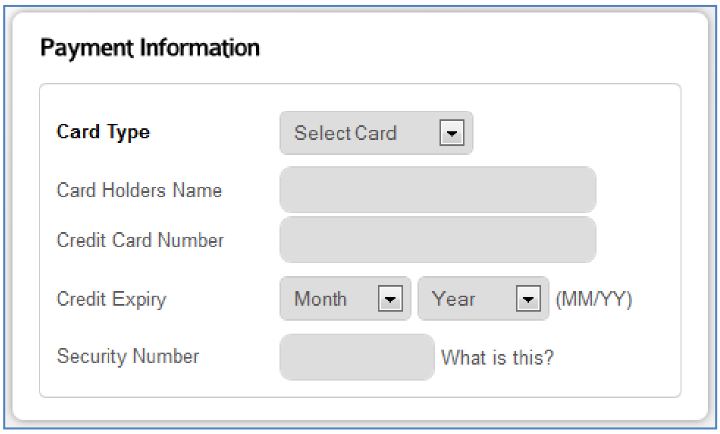
You can either enter the details in manually, or click the **Suggest** buttons to generate these items automatically.

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.

Payment Information

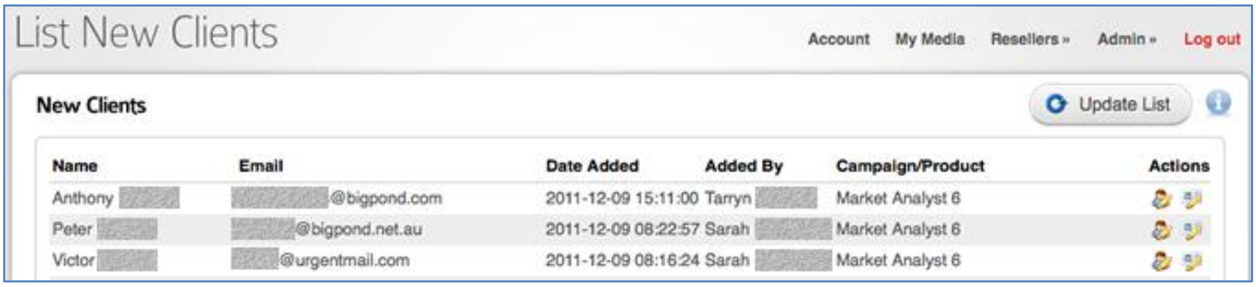
If the package you've selected is to be paid by the new client directly, a new section called Payment Information will display. This section is used to enter the new client's Credit Card details into the Market Analyst system, to be used to process the order. *(AMEX® is only available for AUD transactions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



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.



Adjusting Contact Details

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

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

Reset Clients Username and Password

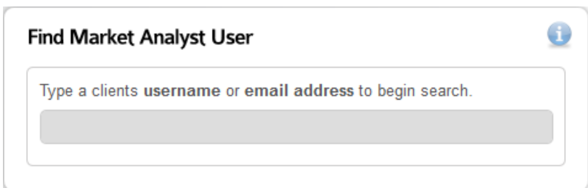
If the client has not received their original installation emails, or they have lost their login details you can reset and re-send the login information by clicking the icon.

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.



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.

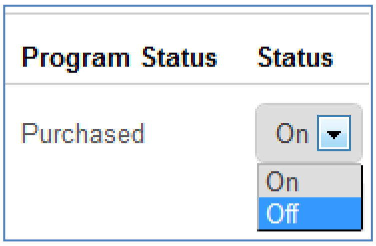
Tool Group

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.

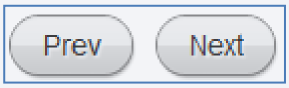


You can remove access to the tool group by clicking on the Drop Down list and selecting the **Off** option.

Page Controls

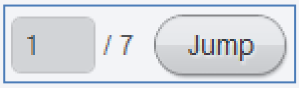
Number Per Page: Lets you set the number of rows displayed on each page of the client table.

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



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

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



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