

# Setting Up a New Reseller

This document explains how to set up a new reseller. You will learn how to add the reseller to your organization, assign inventory, and add a reseller administrator.

You can set up a reseller at the Client Manager and Distributor administrator levels.

The reseller will be added to your organization directly below the level at which you logged in.

## Adding a Reseller

**Step 1:** Log in to [Jasperactive](#). If necessary, select an administrator role from the Role menu.

**Step 2:** Click the **Resellers** option in the panel to display the Resellers page.

### Resellers

**Step 3:** Click the **Add Reseller** button. The General Info window appears.

### Resellers

**Step 4:** Complete the form as directed, and then click **Save**.

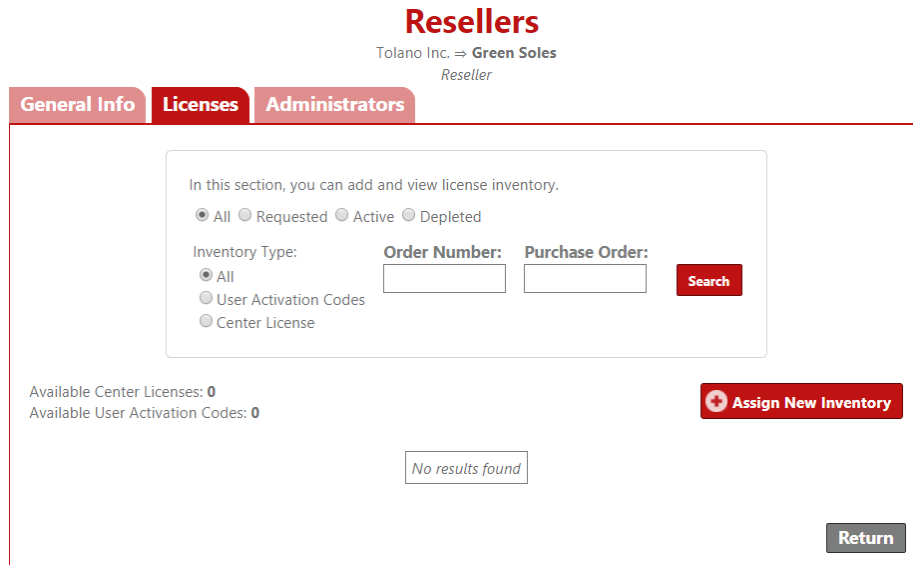
A notification bar appears indicating the reseller was successfully added.

The Resellers page is updated to display the reseller path and two additional tabs: Licenses and Administrators.

## Assigning Inventory

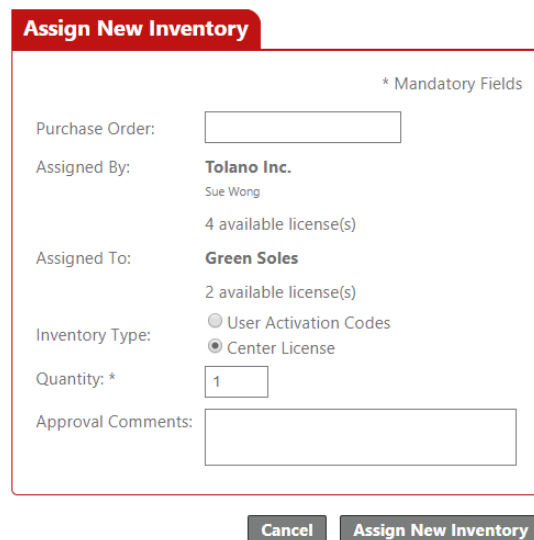
You can assign license inventory to the new reseller using the Licenses tab in the Resellers window.

**Step 1:** Click the **Licenses** tab to display the Licenses window.



The screenshot shows the 'Resellers' window with the 'Licenses' tab selected. The breadcrumb path is 'Tolano Inc. => Green Soles Reseller'. The 'Licenses' tab is active, showing a section for adding and viewing license inventory. It includes radio buttons for 'All', 'Requested', 'Active', and 'Depleted'. Below this, there are sections for 'Inventory Type' (with options 'All', 'User Activation Codes', and 'Center License'), 'Order Number', and 'Purchase Order', each with a text input field. A 'Search' button is to the right of the 'Purchase Order' field. At the bottom left, it shows 'Available Center Licenses: 0' and 'Available User Activation Codes: 0'. A red button with a plus icon and the text 'Assign New Inventory' is on the right. A 'Return' button is at the bottom right. A message box in the center says 'No results found'.

**Step 2:** Click the **Assign New Inventory** button.



The screenshot shows the 'Assign New Inventory' form. It has a red header with the title 'Assign New Inventory'. A note at the top right says '\* Mandatory Fields'. The form contains several fields: 'Purchase Order' (text input), 'Assigned By' (dropdown menu showing 'Tolano Inc.' and 'Sue Wong'), 'Assigned To' (dropdown menu showing 'Green Soles' and '2 available license(s)'), 'Inventory Type' (radio buttons for 'User Activation Codes' and 'Center License'), 'Quantity: \*' (text input with '1'), and 'Approval Comments' (text area). At the bottom, there are two buttons: 'Cancel' and 'Assign New Inventory'.

**Step 3:** Complete the form in the Assign New Inventory window as directed.

Be sure to select the appropriate **Inventory Type** and indicate the number of inventory items to be assigned in the **Quantity** field.

### What is the difference between User Activation Codes and a Center License?

**User Activation Codes** may be used by organizations to provide access for a set number of users. For example: A training center has ten students registered for its Excel Expert 2016 course. The training center has the option to purchase ten individual User Activation Codes (one per student) or one User Activation Code that can be assigned to 10 users. Usage terms are determined at the point sale.

A **Center License** does not limit the number of users; rather, it limits the term of usage to 1 year/365 days. Organizations procuring a center license are permitted to allow the use of Jasperactive to any member within the organization. Organizations are not permitted to resell activation codes generated by a center license.

**Step 4:** Click the **Assign New Inventory** button. A notification bar appears and the search results table updates indicating the inventory was successfully assigned.

To add more inventory, click the **Assign New Inventory** button.

To review the inventory usage information, in the search results table, locate the row for the order you want to access and click the link in the **Order Number** column.

To view the order details, in the search results table, locate the row for the order you want to access, and in the **Options** column, click **Details**.

To return to the main Resellers page, click the **Return** button.

## Resellers

Tolano Inc. ⇒ Green Soles  
Reseller

General Info
Licenses
Administrators

In this section, you can add and view license inventory.

☒ All 
 ☐ Requested 
 ☐ Active 
 ☐ Depleted

Inventory Type: Order Number: Purchase Order:

☒ All 
 ☐ User Activation Codes 
 ☐ Center License

Available Center Licenses: 2

Available User Activation Codes: 0

+ Assign New Inventory

Click Order Number to review the associated inventory usage. Click Details to review the order details.

Order Number	Inventory Type	Purchase Order	Order Status	Requested/Approved	Available	Requested By	Date Requested	Approved By	Options
<a href="#" style="color: red; text-decoration: underline;">27</a>	Center License	GS001339	Active	2	2	Green Soles	2017-09-11 10:59	Tolano Inc. Sue Wong	<a href="#" style="color: red; text-decoration: underline;">Details</a>

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Return

## Assigning a Reseller Administrator

You can assign a reseller administrator to the new reseller using the Administrators tab in the Resellers window.

**Step 1:** Click the **Administrators** tab to display the Administrators window.

The screenshot shows the 'Resellers' window with the 'Administrators' tab selected. The breadcrumb trail is 'Tolano Inc. ⇒ Green Soles Reseller'. The 'Administrators' tab is active, and an 'Add' button is visible in the top right. The main content area contains a message: 'In this section, you can edit the selected administrator's information, reset the password, and change the status. To Save the changes, click **Save**. To exit without saving, click **Cancel**.' Below this message is a box that says 'There are no administrators'. A 'Return' button is in the bottom right corner.

**Step 2:** Click the **Add** button. The Search User options appear.

The screenshot shows the 'Resellers' window with the 'Administrators' tab selected. The breadcrumb trail is 'Tolano Inc. ⇒ Green Soles Reseller'. The 'Administrators' tab is active, and the 'Add' button has been clicked, revealing a 'Search User' form. The form includes a title 'Search User', a subtitle 'Search for an existing user through its email.', and a note '\* Mandatory Fields'. There are two radio buttons: 'Existing User' (selected) and 'New User'. Below the radio buttons is an 'Email: \*' field with a text input box. To the right of the input box are 'Search' and 'Cancel' buttons.

**Step 3:** You can search for an existing user or add a new user. The table below outlines each option.

### Search for an Existing User

1. Click the **Existing User** radio button.
2. In the **Email** field, enter the email address of the person to whom you want to assign the administrator role.
3. Click **Search**. If the email address is already registered in the Jasperactive system, the user information will appear.

**General Info** **Licenses** **Administrators**

**Search User**  
Search for an existing user through its email. \* Mandatory Fields

☒ Existing User ☐ New User

Email: \*

Name: Andrew McSwweeney

Current User Roles

Partner Type	Partner	Role
Center	TA - Seattle	Center Admin
Center	Tolano Adventures - Seattle	Center Admin

- Click the **Add** button to designate this person as the Reseller Administrator.

A notification bar appears and the Administrators table appears indicating the administrator was successfully added.

## Add a New User

- Click the **New User** radio button. The Add Administrator screen appears.

**General Info** **Licenses** **Administrators**

**Add Administrator**  
Complete the form to register the new administrator. \* Mandatory Fields

☐ Existing User ☒ New User

First Name: \*  Last Name: \*  Gender: \*

Date of Birth:  Country: \*  State/Province/Region: \*

City:  Zip/Postal Code:

Language: \*  Center Type: \*  Time Zone: \*

Email: \*  Password: \*

Registration Date:  Last Session:  ☒ Active

- Complete the form as directed, and then click **Save**.

A notification bar appears and the Administrators table appears indicating the administrator was successfully added.

General Info
Licenses
Administrators

+

 Add

In this section, you can edit the selected administrator's information, reset the password, and change the status. To Save the changes, click **Save**. To exit without saving, click **Cancel**.

First Name	Last Name	Email	Active	Options
Andrew	McSweeney	amcsweeney@tolano.com	<input checked="" type="checkbox"/>	
Baradoch	Buchanan	bear@greensoles.com	<input checked="" type="checkbox"/>	

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Return

To add another administrator, click the **Add** button.

To view or edit an administrator's information, locate the row for the administrator you want to access, and in the **Options** column, click the (pencil) icon.

To delete an administrator, locate the row for the administrator you want to delete, and in the **Options** column, click the icon.

To disable a user's account, locate the row for the user you want to make inactive, and in the **Active** column, click the checkbox to deselect it. When a user is made inactive, the user account and all associated roles are disabled and the user can no longer log in to Jasperactive.

Please use extreme caution before disabling user accounts by making them inactive.

To return to the main Resellers page, click the **Return** button.

If you need further assistance, contact Jasperactive Support (<http://support.jasperactive.com/>) or call them at (800) 668-1669.