

Setting Up a New Distributor

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

You can set up a distributor at the Client Manager administrator level.

Adding a Distributor

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

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

Distributors

The screenshot shows the 'Distributors' page interface. At the top right, there is a red button with a plus sign and the text 'Add Distributor'. Below this is a white box titled 'Search Distributors' with the instruction 'In this section you can create, search, edit and view distributors.' The search area contains several input fields: 'Distributor:' (text), 'Country:' (dropdown), 'State/Province/Region:' (dropdown), 'City:' (text), 'Active Licenses:' (text), and 'Purchase Order:' (text). To the right of these fields is a grey 'Search' button. Below the search fields are two rows of radio buttons: the first row has 'User Activation Codes' and 'Center License' (selected), with a note 'Filter results with less or equal than to the specified amount.'; the second row has 'Show only Distributors with inventory requests' and 'Active Distributors' (checked).

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

Distributors

The screenshot shows the 'General Info' window for adding a distributor. The window has a red header with the text 'General Info'. Below the header, it says 'Please complete the fields to complete the distributor information.' and 'Mandatory fields *'. The form contains several fields: 'Organization Name: *' (text), 'Phone Number:' (text with a format '() _-__'), 'Address Line 1:*' (text), 'Address Line 2:' (text), 'Country: *' (dropdown with 'Select your Country'), 'State/Province/Region: *' (dropdown with 'Select your Country'), 'City: *' (text), and 'Zip Code/Postal Code: *' (text). At the bottom left, there is a checked checkbox for 'Active'. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

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

A notification bar appears indicating the distributor was successfully added.

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

Assigning Inventory

You can assign license inventory to the new distributor using the Licenses tab in the Distributors window.

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

The screenshot shows the 'Licenses' tab selected in a window with three tabs: 'General Info', 'Licenses', and 'Administrators'. The main content area contains the following elements:

- Text: "In this section, you can add and view license inventory."
- Radio buttons: All, Requested, Active, Depleted
- Inventory Type: All, User Activation Codes, Center License
- Order Number:
- Purchase Order:
- Search button: **Search**
- Available Center Licenses: 0
- Available User Activation Codes: 10
- Assign New Inventory button: **Assign New Inventory**
- No results found message: *No results found*
- Return button: **Return**

You can add inventory only after it has been requested and allocated from CCI. (Refer to the **Using the License Inventory Option** article to learn how to request new inventory.)

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

The screenshot shows the 'Assign New Inventory' form with the following fields and values:

- Purchase Order:
- Assigned By: **CCI Learning**
Sue Wong
- Assigned To: **Tolano Inc.**
0 available license(s)
- Inventory Type: User Activation Codes, Center License
- Quantity: *
- Approval Comments:
- * Mandatory Fields
- Buttons: **Cancel**, **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. User Activation Code usage terms are determined at the point of sale.

A **Center License** does not have a set number of users; rather, it has a term of 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 Distributors page, click the **Return** button.

General Info
Licenses
Administrators

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

All
 Requested
 Active
 Depleted

Inventory Type: All User Activation Codes Center License

Order Number: Purchase Order: Search

Available Center Licenses: 2 ➕ Assign New Inventory

Available User Activation Codes: 0

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
27	Center License	GS001339	Active	2	2	Green Soles	2017-09-11 10:59	Tolano Inc. Sue Wong	Details

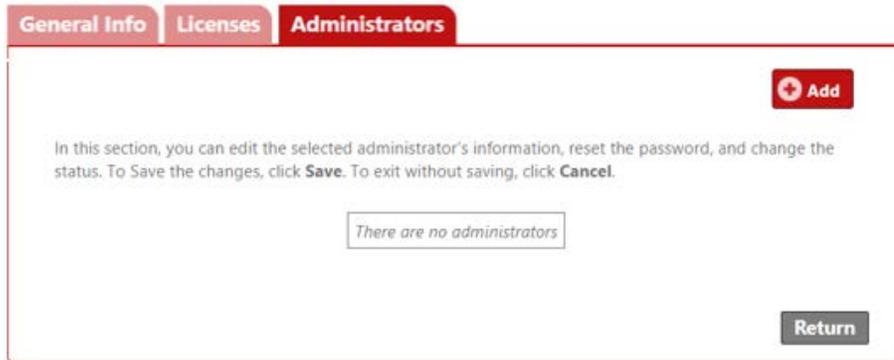
1

Return

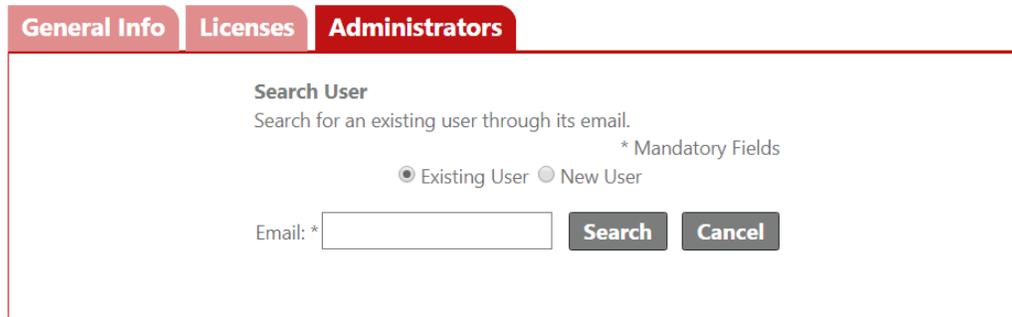
Adding a Distributor Administrator

You can assign an administrator to the new distributor using the Administrators tab in the Distributors window.

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



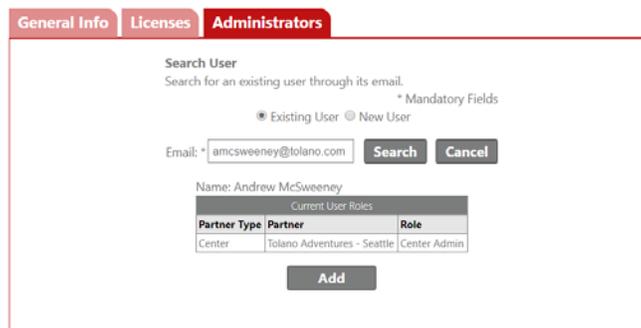
Step 2: Click the **Add** button. The Search User options appear.



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.



Partner Type	Partner	Role
Center	Tolano Adventures - Seattle	Center Admin

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

- Complete the form as directed, and then click **Save**.
A notification bar appears and the Administrators table appears indicating the administrator was successfully added.

First Name	Last Name	Email	Active	Options
Andrew	McSweeney	amcsweeney@tolano.com	<input checked="" type="checkbox"/>	
Nick	Klassen	nklassen@tolano.com	<input checked="" type="checkbox"/>	

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 **X** 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 Distributors page, click the **Return** button.

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