Account Page

13 Steps

Created by	Creation Date	Last Updated
Shayon Zadeh	August 25, 2022	September 13, 2022

Forms Tab – Manage Filing

The manage filing page, which is under the forms tab, lets you see the wholesaler packets that have been created and what status they are in.

- In process means the filing needs to be submitted
- Pending review means it has been submitted and is waiting for an LAAG staff member to review the filing
- Complete means the filing has been reviewed and approved.

Forms Tab

Click on the forms tab to select between the manage filing page and the excel uploads page.

Forms Tab – Excel Uploads

The excel uploads page is where you will upload your LDR excel files, and if applicable your Exports and Product in Inventory data.

Profile Tab

The profile tab shows information about the wholesaler account.

Contacts Tab

Contacts shows the information of the primary contact and any secondary contacts or officers for the wholesaler. The primary contact is the person with responsibility for the account, and is the person with whom the LAAG will begin their conversations with if they need to contact the company.

Filers Tab

Filers tab shows which filers (users of the system) have access to the wholesaler account. There can be multiple people with access to an account.
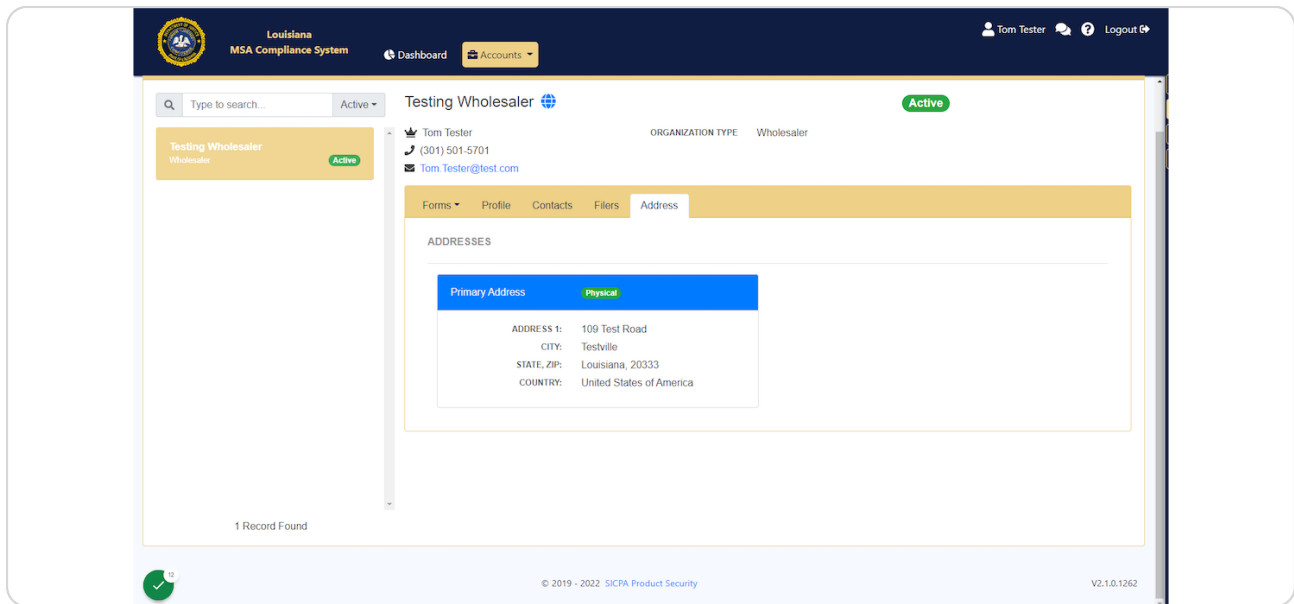
Address Tab
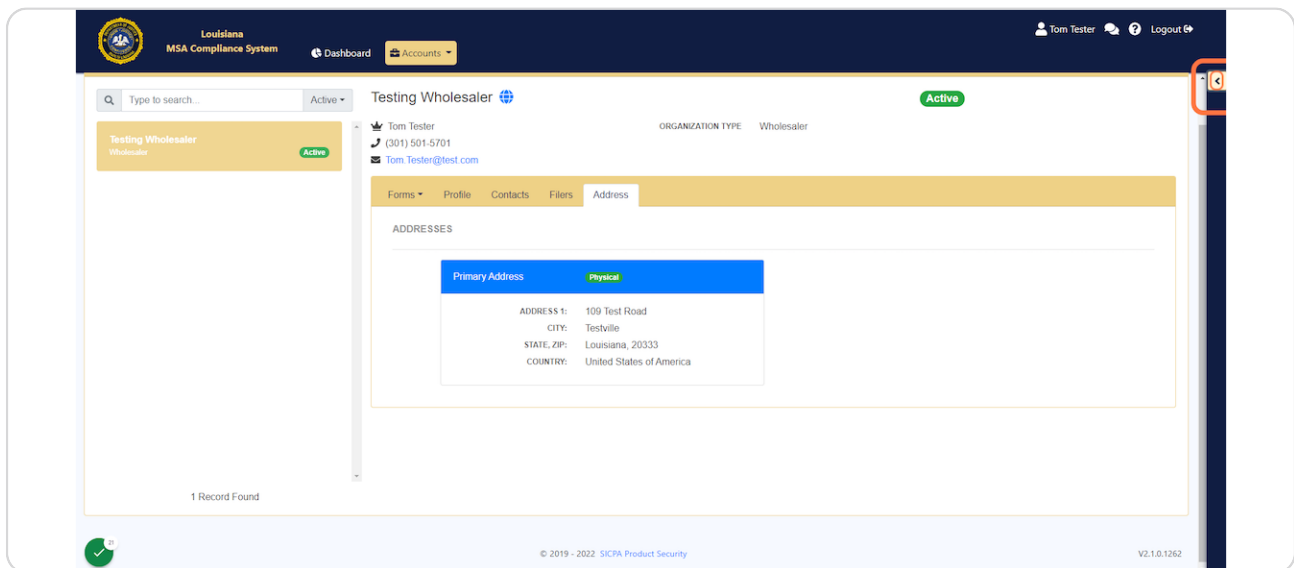
The address tab shows the address information for the account. Addresses may include physical, mailing and/or other.
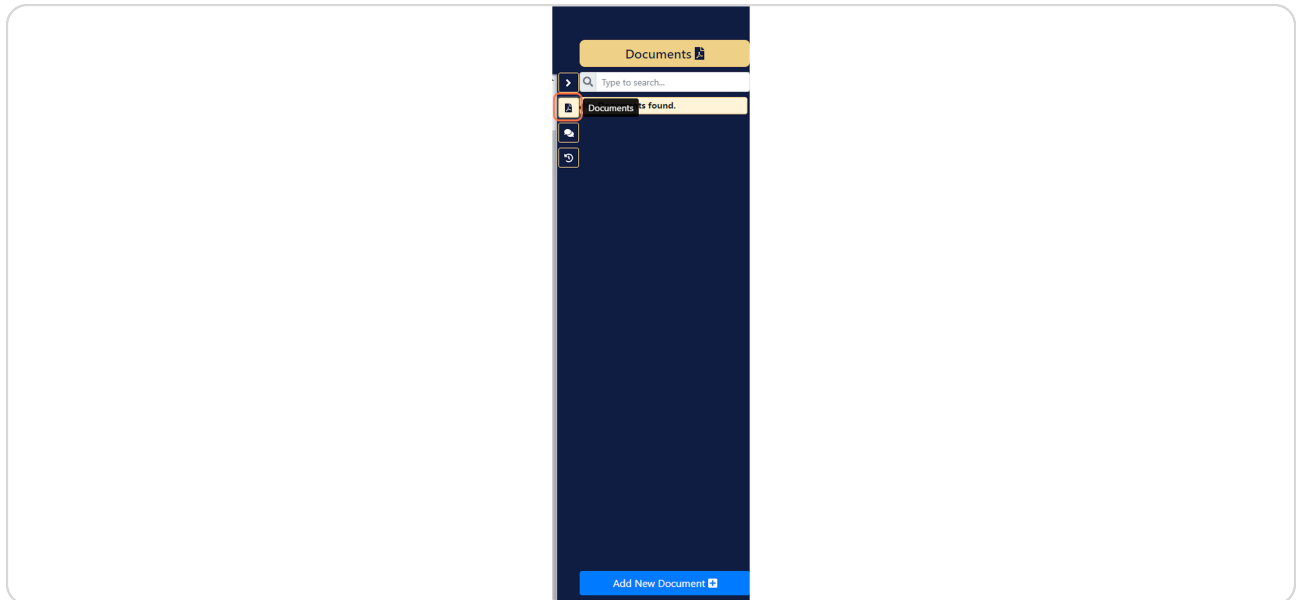
Open/Close Right Hand Panel

The right hand panel can be opened and closed by clicking on the arrow at the top right corner of the screen.

Right Hand Panel – Documents

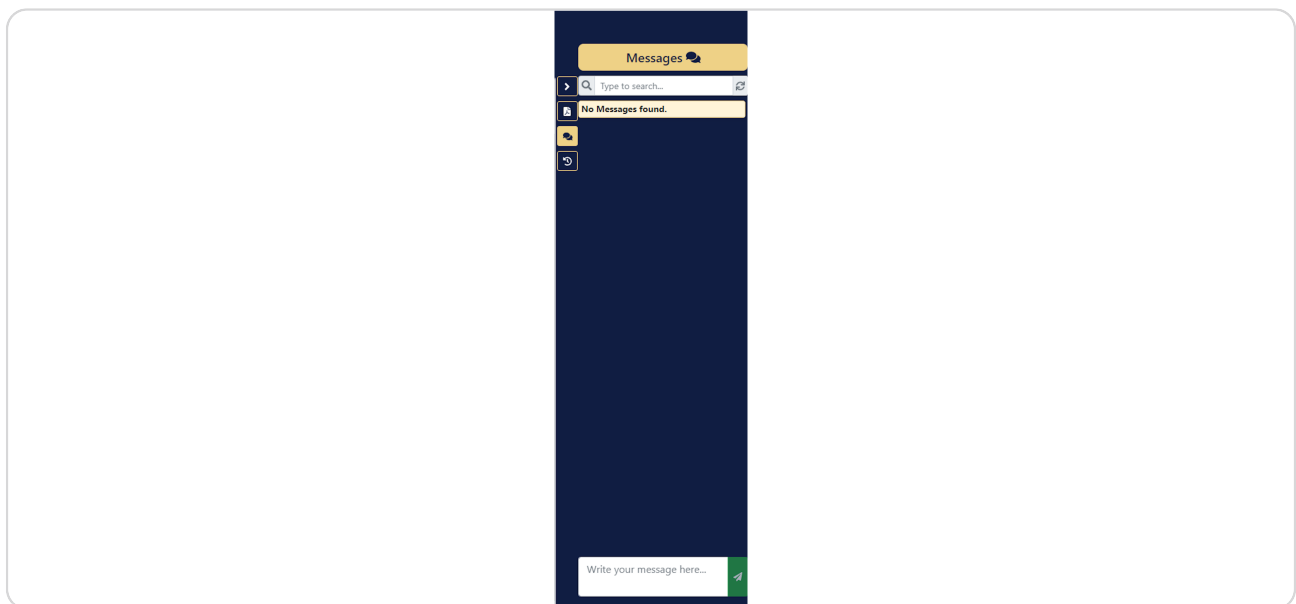The documents tab is where you can upload pdf documents.

<u>Right Hand Panel – Messages</u>

Messages tab is where you can send messages to LAAG staff and where they can send messages to you.
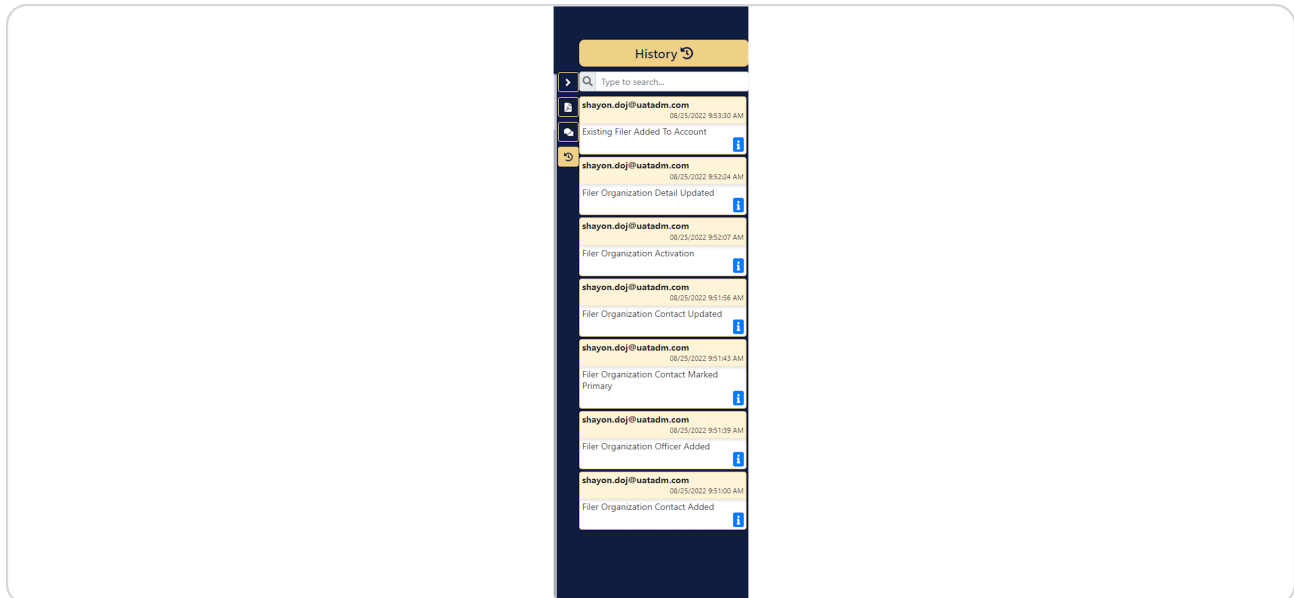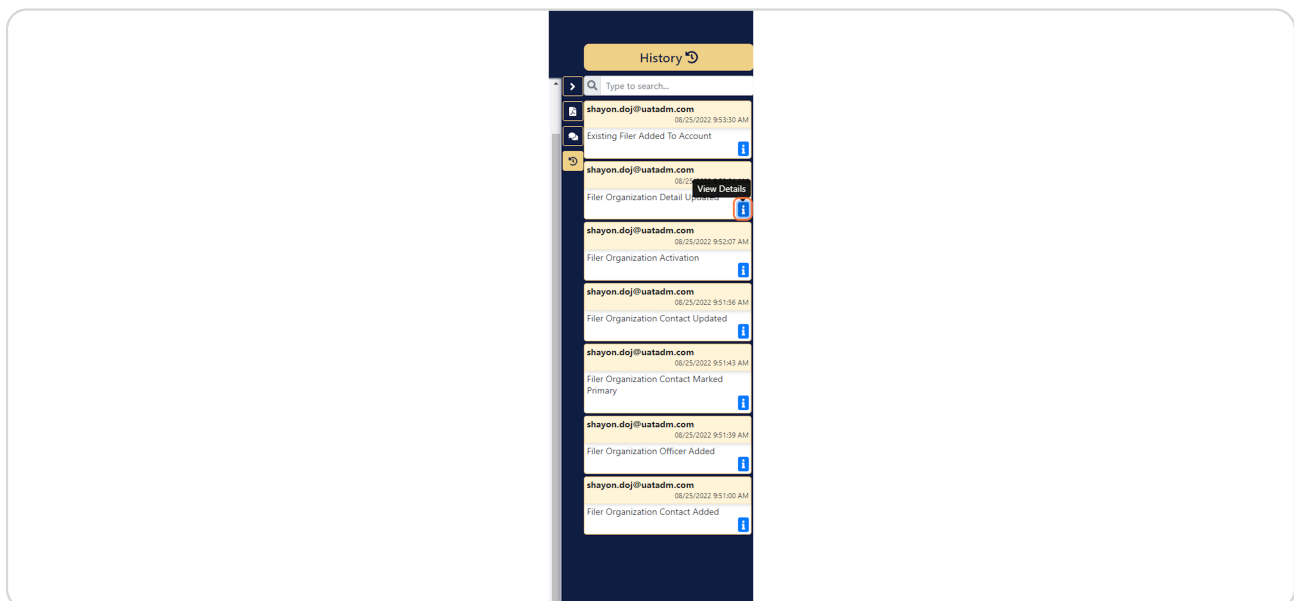
STEP 11

Right Hand Panel – History

History tab shows what has been done on the wholesaler account, by whom, and when.

STEP 12

History – Details

You can view more details of each history entry by clicking the information icon shown with the letter "i" on a blue square.

History – Details

Another window will pop up showing the before and after of what was changed.

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