



# Account Page

13 Steps

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Creation Date  
August 25, 2022

Last Updated  
September 13, 2022

## STEP 1

### 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.

The screenshot displays the 'Accounts' section of the Louisiana MSA Compliance System. The user is logged in as 'Tom Tester'. The 'Accounts' page shows a list of accounts, with 'Testing Wholesaler' selected. The 'Forms' tab is active, showing a list of 'Wholesaler Filings'. The table lists three filings: 'JUN 2022 - Original (1)' with status 'Complete', 'JUL 2022 - Original (1)' with status 'Pending Review', and 'AUG 2022 - Original (1)' with status 'In Process'. The page also includes a search bar, filters, and a '1 Record Found' indicator.

Wholesaler Filing	Date Received	Last Modified	Status
Wholesaler Filing JUN 2022 - Original (1)	Not available	08/25/2022	Complete
Wholesaler Filing JUL 2022 - Original (1)	Not available	08/25/2022	Pending Review
Wholesaler Filing AUG 2022 - Original (1)	Not available	08/25/2022	In Process

## STEP 2

### Forms Tab

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

The screenshot displays the Louisiana MSA Compliance System interface. The top navigation bar includes the Louisiana state seal, the text 'Louisiana MSA Compliance System', and links for 'Dashboard' and 'Accounts'. The user 'Tom Tester' is logged in. The main content area is titled 'Accounts' and shows a search bar with 'Type to search...' and a dropdown menu. Below the search bar, there is a list of accounts, with 'Testing Wholesaler' selected and marked as 'Active'. The 'Testing Wholesaler' account details are shown, including the user 'Tom Tester', phone number '(301) 501-5701', and email 'Tom.Tester@test.com'. The 'Forms' tab is selected, and the 'Excel Uploads' sub-tab is highlighted with a red box. The 'Excel Uploads' sub-tab shows a table of filings with columns for 'Wholesaler Filing', 'Date Received', 'Last Modified', and 'Status'. The table contains three rows of data, all with a status of 'Complete'. The bottom of the page shows '3 Record Found' and a 'Show 10 Rows' option.

Wholesaler Filing	Date Received	Last Modified	Status
JUN 2022 - Original (1)	Not available	08/25/2022	Complete
JUL 2022 - Original (1)	Not available	08/25/2022	Pending Review
AUG 2022 - Original (1)	Not available	08/25/2022	In Process

## STEP 3

### 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.

The screenshot shows the 'Accounts' page in the Louisiana MSA Compliance System. The user is logged in as 'Tom Tester'. The page displays a list of accounts, with 'Testing Wholesaler' selected. The 'Forms' tab is active, showing the 'Excel Uploads' section. A table lists two uploads: 'JUL 2022 DOR\_Test\_Session.xlsx' and 'JUN 2022 DOR\_Test\_Session.xlsx', both marked as 'Complete'. A 'New Upload' button is visible. The page also shows a search bar, a filter dropdown set to 'Active', and a 'Refresh' button.

EXCEL UPLOADS	STATUS
JUL 2022 DOR_Test_Session.xlsx 5611 5613 Example.xlsx	Complete
JUN 2022 DOR_Test_Session.xlsx 5611 5613 Example.xlsx	Complete

2 Records Found

## STEP 4

### Profile Tab

The profile tab shows information about the wholesaler account.

The screenshot shows the 'Profile' tab for 'Testing Wholesaler'. The page displays the organization's details, including the legal name 'Testing Wholesaler', alternate name 'Tom's Testing Wholesaler', organization type 'Wholesaler', FEIN '946194723', ATC permit number, LDR account number, phone number '(301) 591-4914', fax number 'No data available', and website 'https://www.testingtom.com'. The page also shows a search bar, a filter dropdown set to 'Active', and a 'Refresh' button.

ORGANIZATION NAMES
LEGAL NAME: Testing Wholesaler
ALTERNATE NAME: Tom's Testing Wholesaler

ORGANIZATION DETAILS
ORGANIZATION TYPE: Wholesaler
FEIN: 946194723
ATC PERMIT NUMBER
LDR ACCOUNT NUMBER
PHONE NUMBER: (301) 591-4914
FAX NUMBER: No data available
WEBSITE: https://www.testingtom.com

## STEP 5

### 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.

The screenshot displays the Louisiana MSA Compliance System interface. The top navigation bar includes the Louisiana state seal, the text "Louisiana MSA Compliance System", and links to "Dashboard" and "Accounts". The user "Tom Tester" is logged in, with a "Logout" link. A search bar is present with the text "Type to search...". The main content area is titled "Testing Wholesaler" and includes a green "Active" status indicator. Below this, a summary card shows the contact information for Tom Tester: NAME: Tom Tester, EMAIL: Tom.Tester@test.com, and PHONE NUMBER: (301) 501-5701. The "CONTACTS" section is expanded, showing a table with one record for Tom Tester, marked as the primary contact. The "OFFICERS" section is also expanded, showing a table with one record for Tim Tester, marked as an agent. The bottom of the page shows a green checkmark icon and the text "1 Record Found".

CONTACTS
<b>Primary</b>
NAME: Tom Tester
EMAIL: Tom.Tester@test.com
PHONE NUMBER: (301) 501-5701

OFFICERS
NAME: Tim Tester
OFFICER TYPE: Agent
EMAIL: Agent.Tom@test.com
PHONE NUMBER: (301) 501-7501

## STEP 6

### 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.

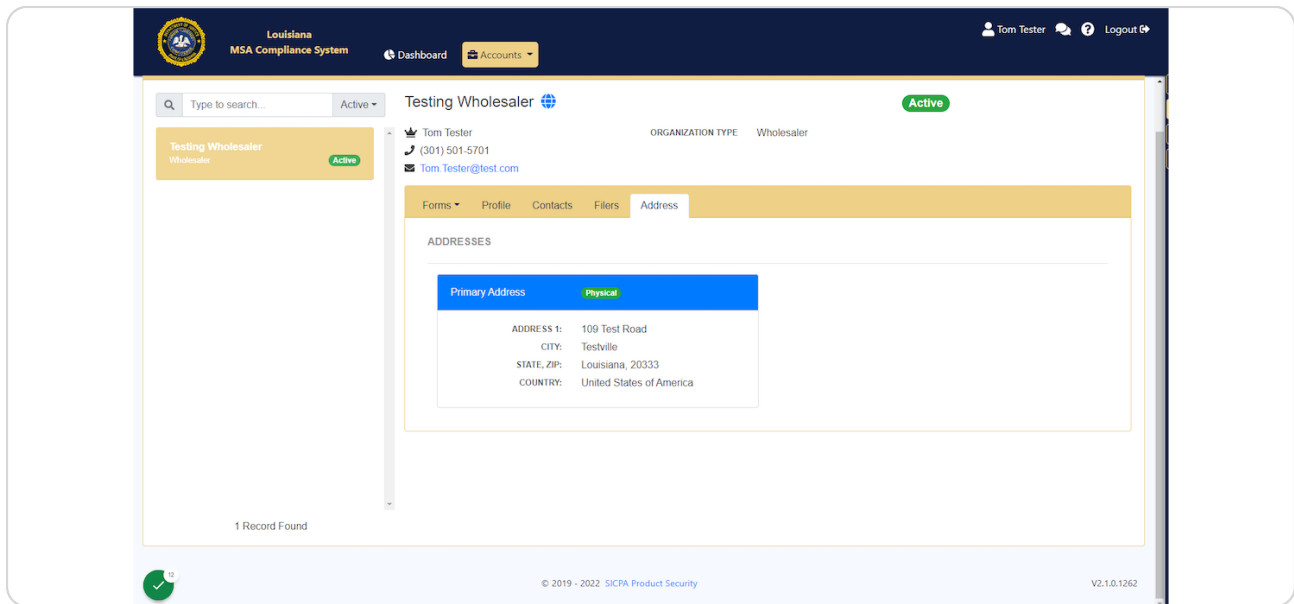
The screenshot displays the Louisiana MSA Compliance System interface. The top navigation bar includes the Louisiana state seal, the text "Louisiana MSA Compliance System", and links for "Dashboard" and "Accounts". The user "Tom Tester" is logged in, with a "Logout" button. The main content area shows a search bar with "Type to search..." and an "Active" dropdown. Below this, a card for "Testing Wholesaler" is shown with an "Active" status. The "Filers" tab is selected, displaying a table of users with access to the account. The table lists "Tom Tester" as an active filer with the email "Tom.Tester@test.com". The footer includes a copyright notice "© 2019 - 2022 SICPA Product Security" and the version "V2.1.0.1262".

FILERS
Tom Tester <span>Active</span>
EMAIL: <a href="mailto:Tom.Tester@test.com">Tom.Tester@test.com</a>

## STEP 7

### Address Tab

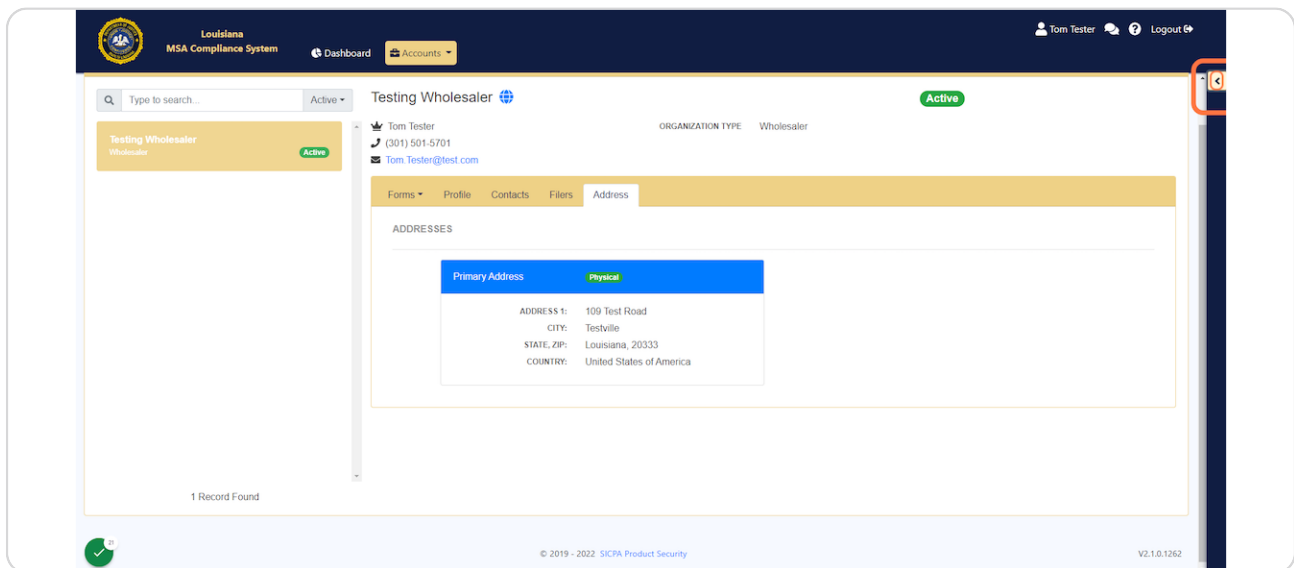
The address tab shows the address information for the account. Addresses may include physical, mailing and/or other.



## STEP 8

### Open/Close Right Hand Panel

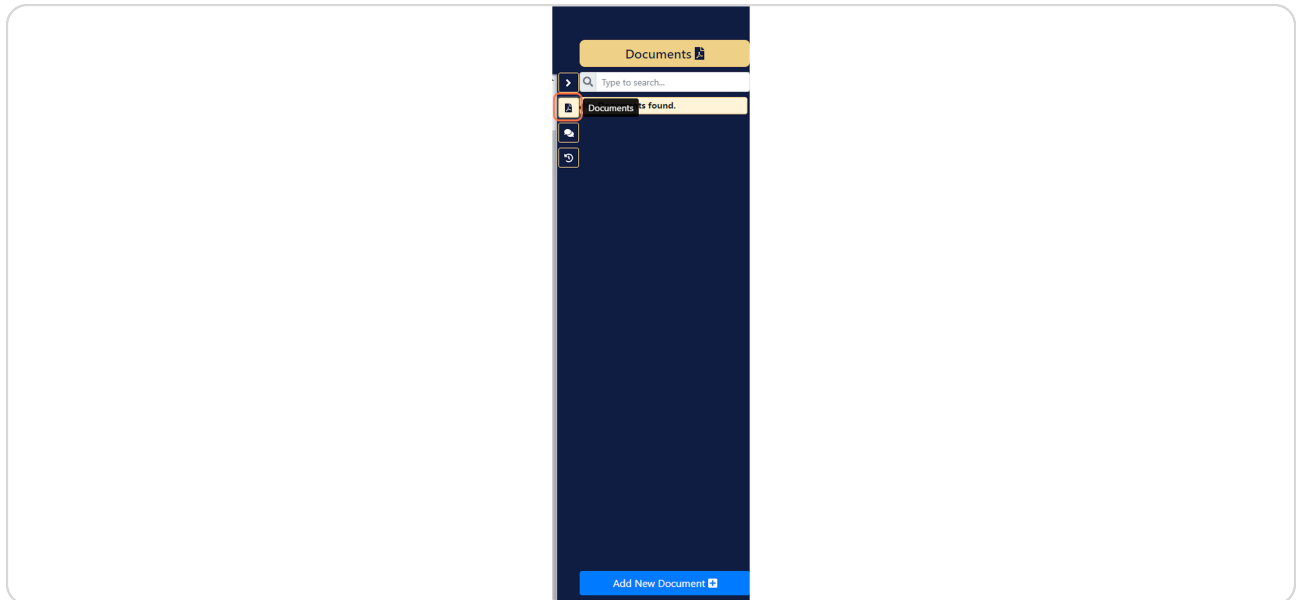
The right hand panel can be opened and closed by clicking on the arrow at the top right corner of the screen.



## STEP 9

### Right Hand Panel – Documents

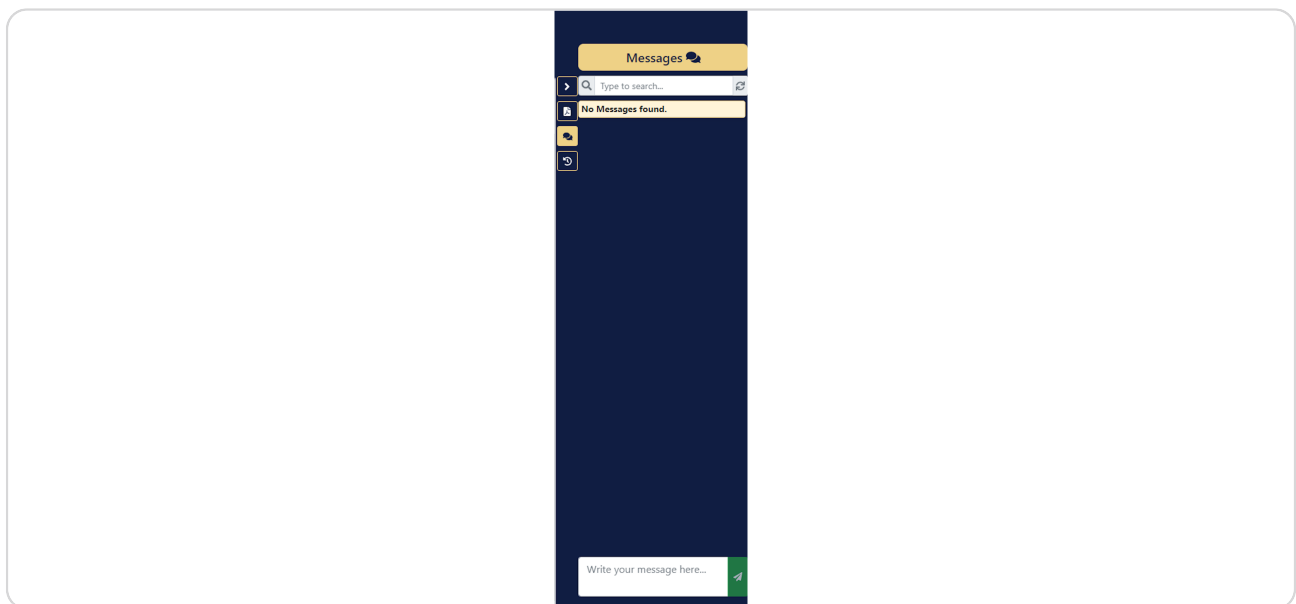
The documents tab is where you can upload pdf documents.



## STEP 10

### Right Hand Panel – Messages

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

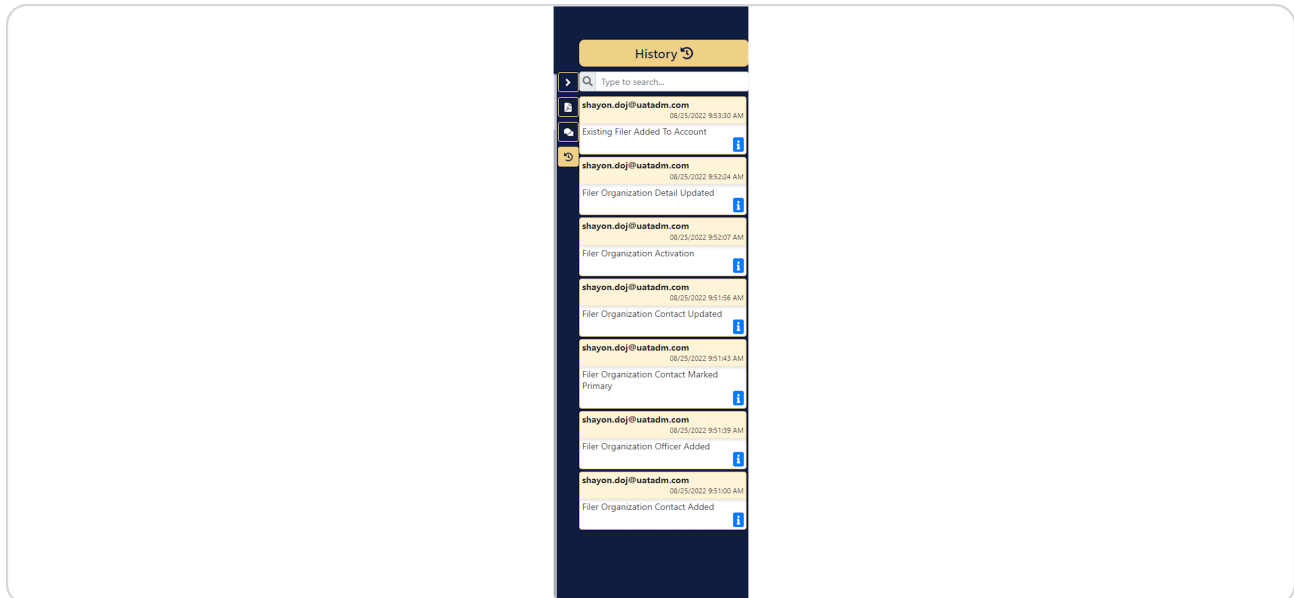




## STEP 11

### Right Hand Panel - History

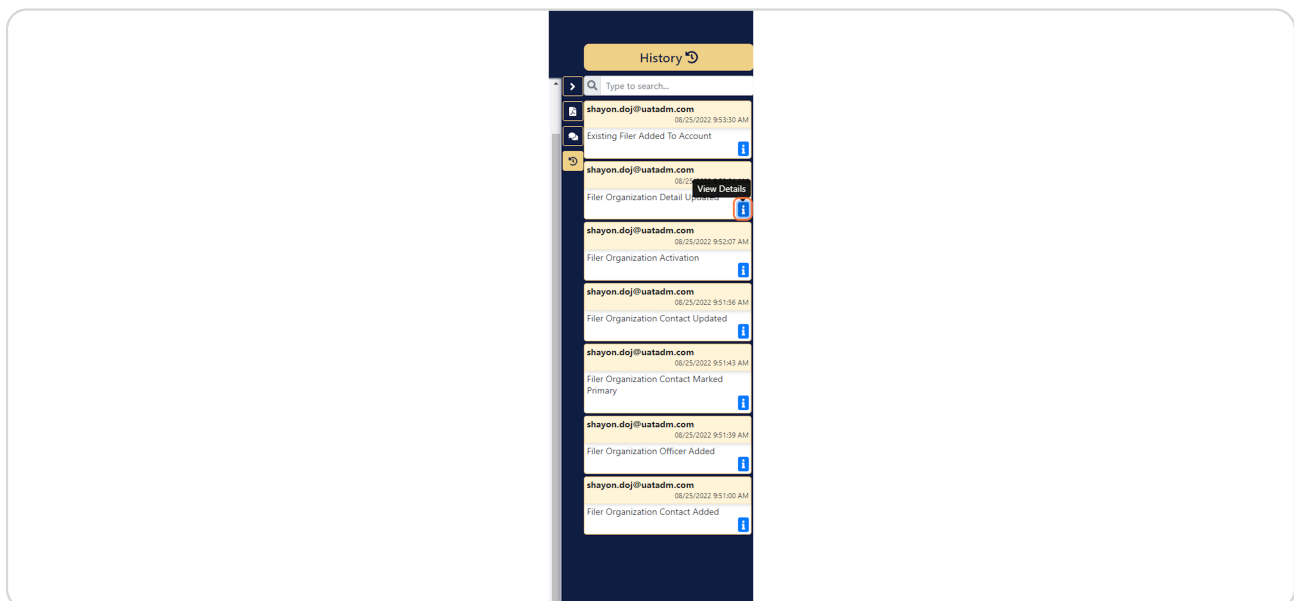
History tab shows what has been done on the wholesaler account, by whom, and when.



## 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.



## STEP 13

### History - Details

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

The screenshot displays the Louisiana MSA Compliance System interface. A 'History Details' modal window is open, showing a table of changes. The table has three columns: 'Property / Field', 'Before', and 'After'. The data shows a change in the 'Website' field from 'https://testingtom.com' to 'https://www.testingtom.com' and an update in the 'Updated On' field from '08/25/2022 9:49:40 AM' to '08/25/2022 9:52:24 AM'. The background shows the 'ADDRESSES' section with a 'Primary Address' card containing the following information:

Property / Field	Before	After
Website	https://testingtom.com	https://www.testingtom.com
Updated On	08/25/2022 9:49:40 AM	08/25/2022 9:52:24 AM

Below the modal, the 'ADDRESSES' section is visible, showing a 'Primary Address' card with the following details:

Property / Field	Value
ADDRESS 1:	109 Test Road
CITY:	Testville
STATE, ZIP:	Loussiana, 20333
COUNTRY:	United States of America

The bottom of the screen shows a footer with the text '© 2019 - 2022 SICPA Product Security' and 'V2.1.0.1262'.

