Training for MA Partner Portal
Jan 7, 2021, 2:00 – 3:15 PM

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NOTE: When naming online for the web editing, the title should be: MA Portal Training and inserted Into the Fonteva AMS Training Flipper. Also when adding to the web, use the info from notes to put into the blurb.

- Once you are logged in, you are in the MA Portal. It will first show the subscription (totally Members within your MA by their subscription type).
- You can see your top 10 sub. By type (center)
- You will see your cases (how you get in touch with WEF customer service team)
- You can begin a new case here and then enter relevant information.
- If you log in a case about a specific member of your MA, you can enter their name.
- Now confirm and your case gets created.
- If you click on the “related” record, you can attach files, etc. Hi regarding your case.
- Back at home screen, you may wish to see a refresh view of the dashboard. Click refresh on the top right to see how data has changed or details regarding membership.
- Top right you have *click links* to go to external resources, MA community or WEF community (MA resource center) with a single click. (Saves time entering credentials again)
- From Members tab (top) see MA Portal/All Contacts, you can search by name.
- You can search via recently viewed and use a *global search* for a sub. # or a member or even a case by entering a key word.
- Under *Reports* Tab (top), you can go to All Reports and see all reports you have access to.
- You can edit your filter by clicking on the “funnel” icon (top right)
- Under reports tab (top) you can see a report titled *MA Rebate by Date* (specific to your MA). Here you can see a summary of all the rebates/members from the beginning of time. You can export as an excel document.
- Click on dashboard (top) – you will see graphical representations of reports here. You will find it *here*. More will be added, (only one is showing now).
- You can click “view” report to see the report.
- Click on Case tab (top) – View all your cases you have submitted and create a new case.
- **How to create a contact:** Navigate to the **Members** tab and click New button (top right), enter information for the new contact, click save. New contact has been created. (There will be no information in the related tab for that new contact yet.)
- **How to create a sales order:** Once new record had been added, click on **Rapid order entry** (top right button/tab). Or click on create sales order button. *Business group* box must stay as WEF always. Under Item Quick Add, select type of membership. Next tab to the right, you can choose annual membership renewal or not automatic. Then click on create order.
- Under Optional Package Items, you can choose an MA.
- Now you can process payment (after sales order is created)
- Click **GO** (top right), (directed to a new screen), select payment, review, and **apply payment** (top right) and (enter CC information here). Click on **process payment** when info has been entered.
- You can view document and create a receipt and save as .pdf. Click down arrow (top right) and click on customer receipt (bottom on list from dropdown). If the member has an email entered in their record, the receipt will automatically be sent to them.

- You will automatically be directed [back] to the MA community window at this time.
- Note: If you process a payment, WEF will receive the money and you (the MA) will be rebated by WEF. You may wish to collect your MA dues but inform WEF you are doing that.
- Saving Individual credit card information is performed by the member and not by WEF/MA staff due to compliance reasons.
- **Auto-Renewal Option:** This is set up if a member has saved their credit card. Credit Card will be charged 30 days before membership expired. WEF offers a 5% reduction if member signs up using auto-renewal (WEF Dues only).
- UPP membership can be managed/processed in MA Portal. Note, this function may not be ready by launch.