# ADVANCE.AI SaaS Portal User Guide V2.0

February 2022

# Receiving Email for Login Credentials

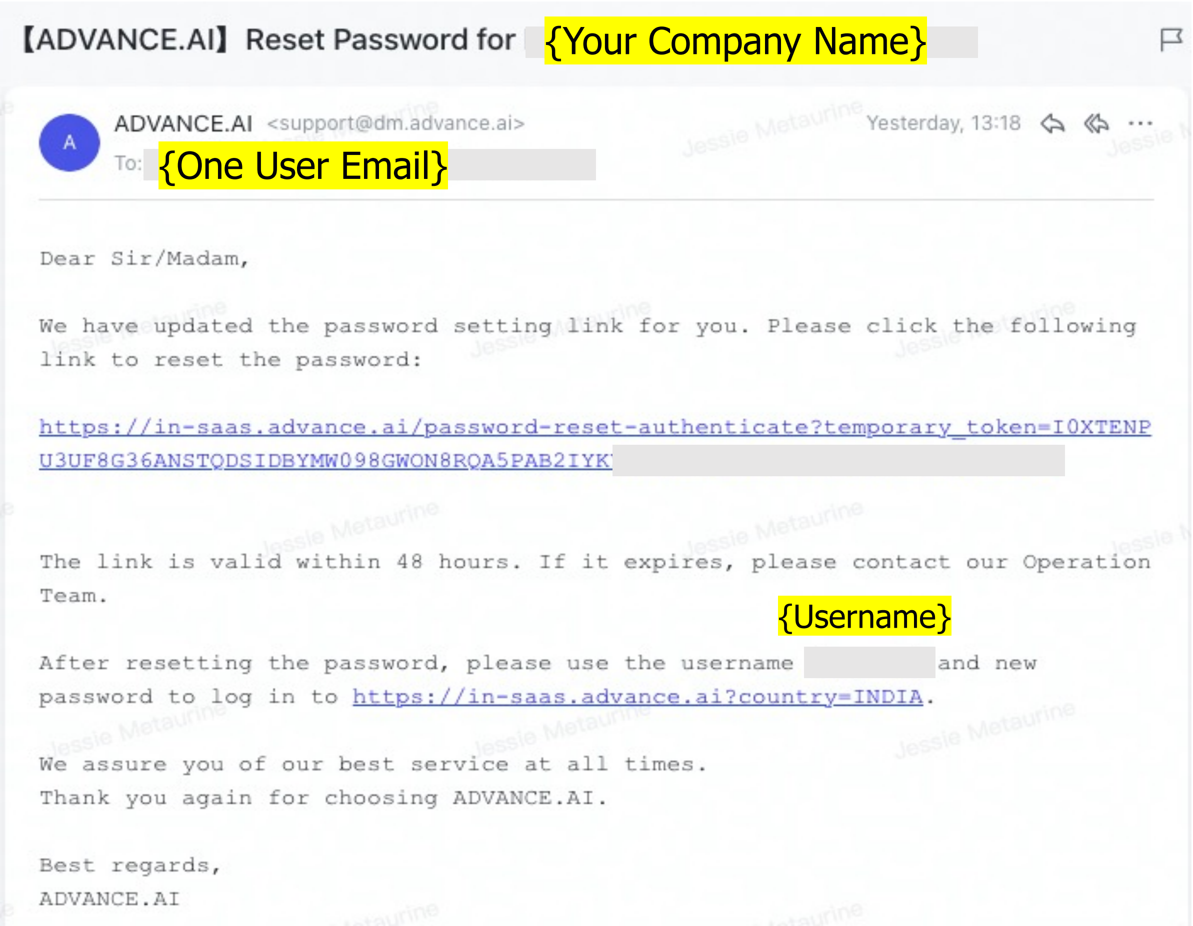
Sign Up

"How do I get access to ADVANCE.AI's WebSaas?"

1. Contact ADVANCE.AI BD personnel.
2. Once NDA has been signed, Operation Team will create an account for you.
3. A **reset password email** will be sent to an email address registered with us.

**Note:**

- For safety concern, only **one user** is allowed to receive a reset password email.
- Please click the password reset link in the account activation email to set your password. The link in the email is valid for 48 hours.



【ADVANCE.AI】 Reset Password for {Your Company Name}

ADVANCE.AI <support@dm.advance.ai> Yesterday, 13:18

To: {One User Email}

Dear Sir/Madam,

We have updated the password setting link for you. Please click the following link to reset the password:

https://in-saas.advance.ai/password-reset-authenticate?temporary_token=I0XTENPU3UF8G36ANSTQDSIDBYMW098GWON8RQA5PAB2IYK

The link is valid within 48 hours. If it expires, please contact our Operation Team.

{Username}

After resetting the password, please use the username and new password to log in to https://in-saas.advance.ai?country=INDIA.

We assure you of our best service at all times.
Thank you again for choosing ADVANCE.AI.

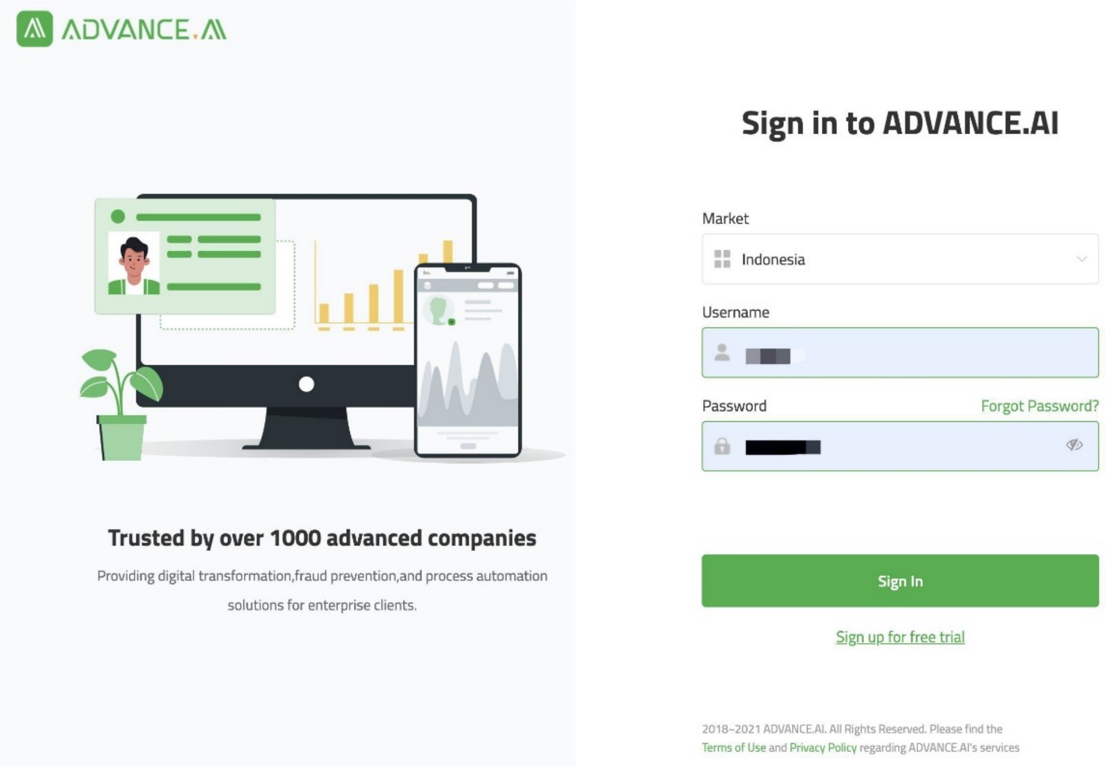
Best regards,
ADVANCE.AI

# Signing In to WebSaaS

## Sign In

"How Do I Sign In to WebSaaS?"

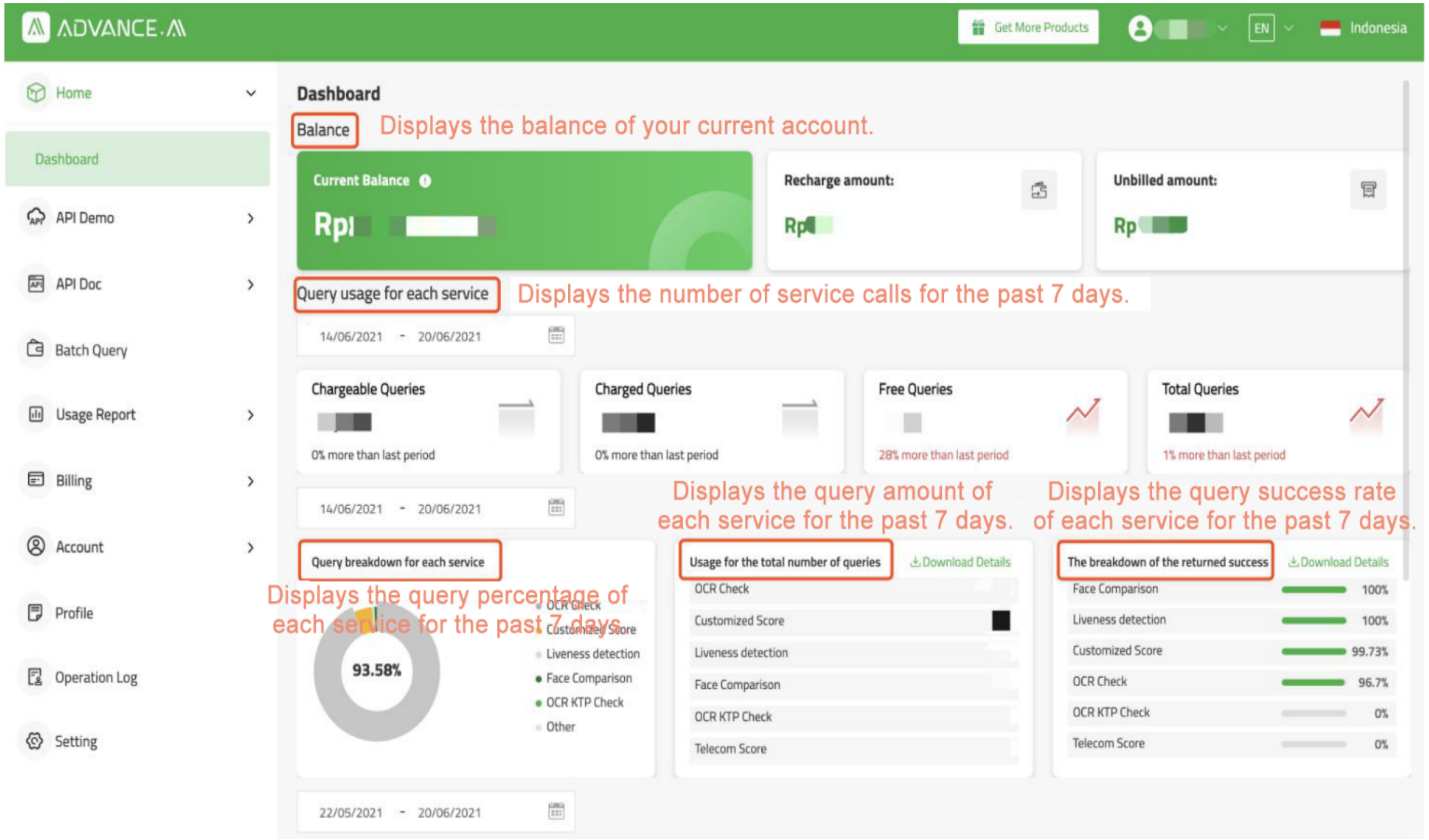
1. Complete the first step (Slide 2) to reset your password before link expires.
2. Visit https://in.advance.ai.
3. Select the market your company is operating at.
4. Enter the username and password that has been reset.



# WebSaaS Dashboard

Dashboard

- The dashboard contains all the usage summary which includes balance and queries usage.
- It will show the breakdown of each service used as well as the percentage.
- The definition of each section can be seen from the right picture.



# API Demo

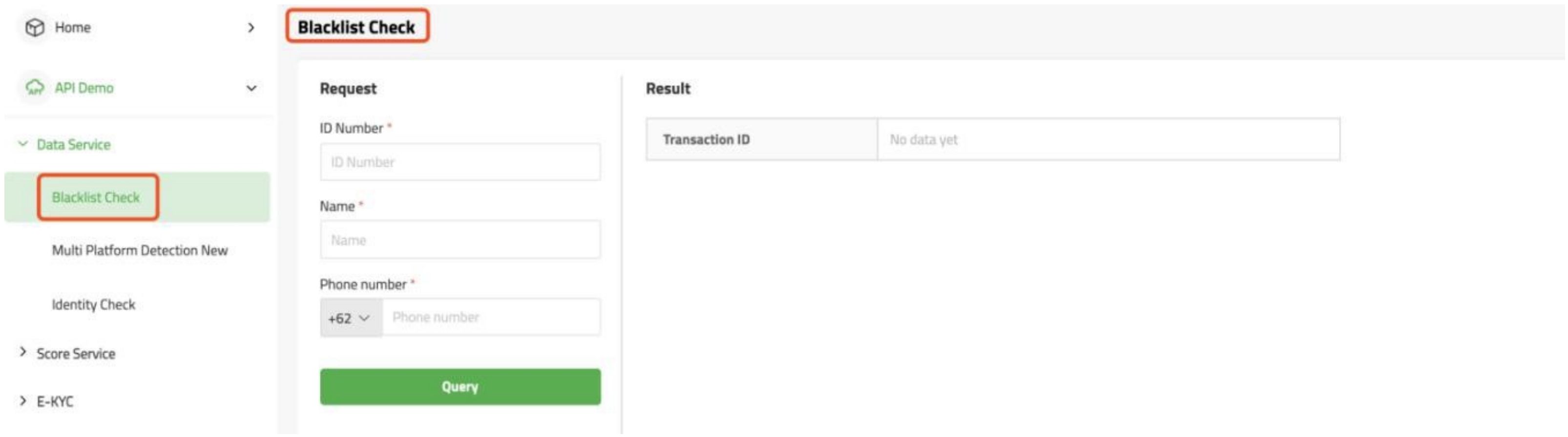
Testing Account

- API Demo is available in the testing environment and not visible in the official/production account.

- Testing clients are able to test out services available for demo directly through the WebSaas.

- Some services may require API integration, whilst others can be tested through the ready-made platform in the portal.

- Please make request to BD/Sales team if you need to test out other services other than what is available in your account.



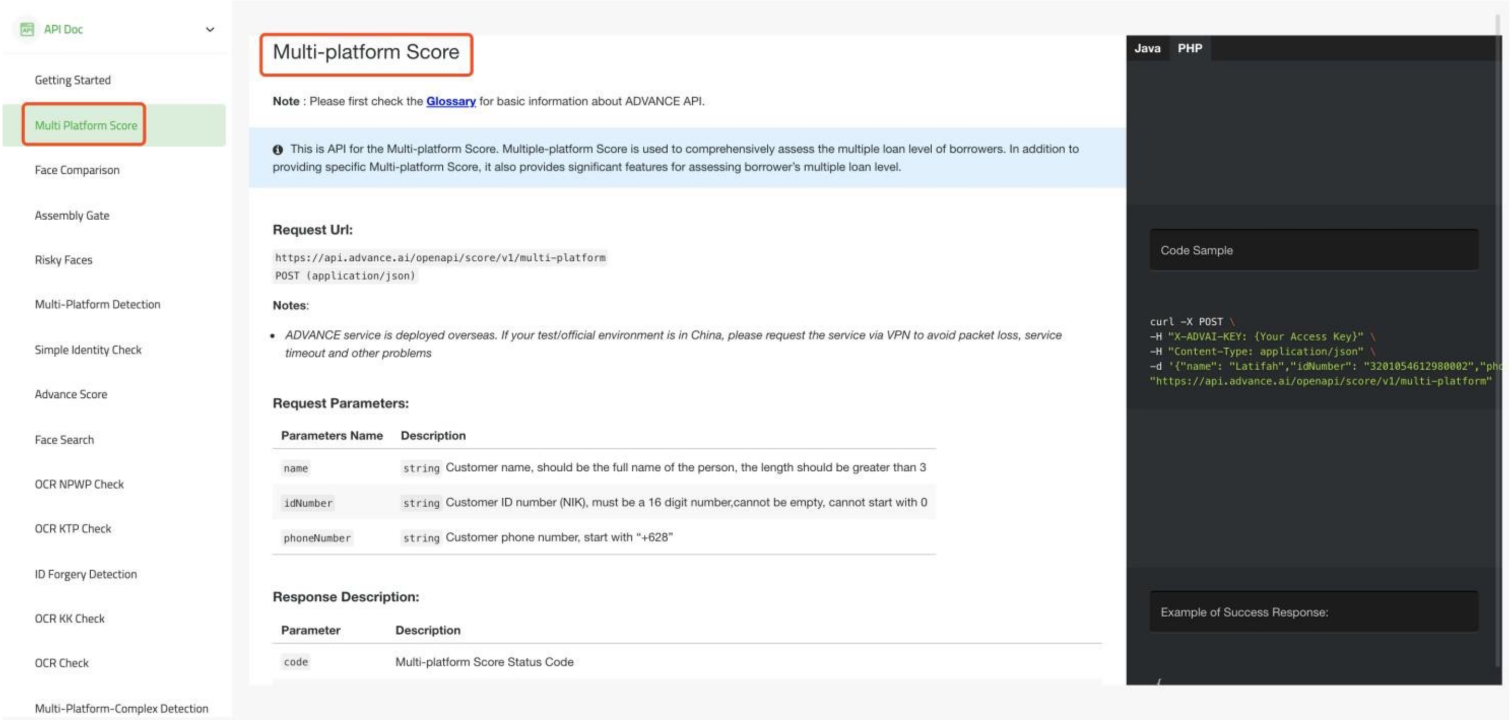
# API Doc

Documentation

- API Doc section is meant to show all the available documentation for services activated on your account.

- Once the service is activated in the account by Operation Team, it will appear in this section.

- If you have made your request and have been informed that the service has been activated, please log out and sign in back to the account. The doc will automatically appear in this section.



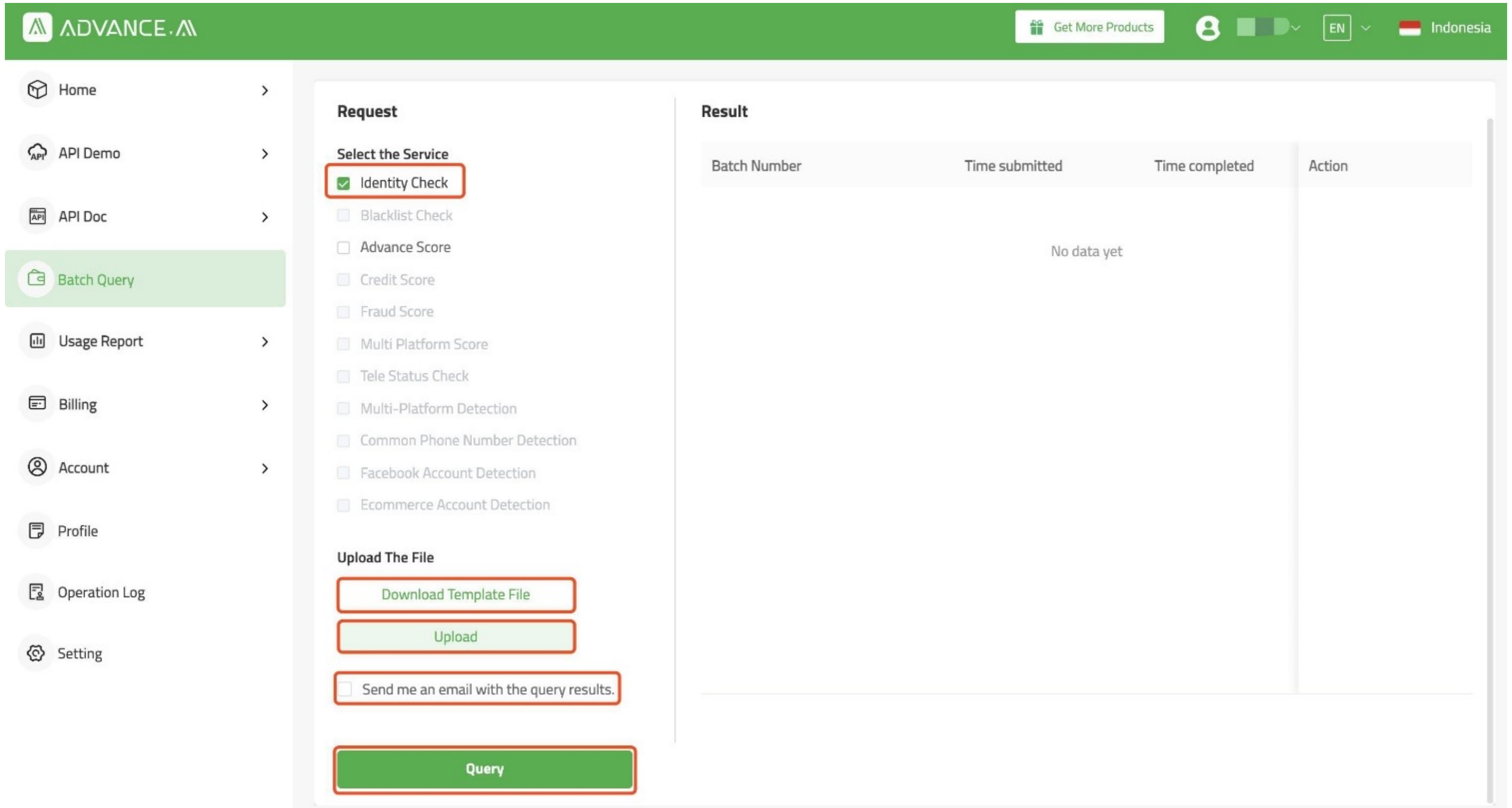
# Batch Query

## Upload in Bulk

"How Do I Perform a Batch Query?"

1. Choose **Batch Query** > **Request** and select the desired service.
2. Click **Download Template File**.
3. Fill in the query template.
4. Click **Upload** to upload the CSV query template file.

Note: If you want to receive the result by email, select **Send me an email with the query results**. Then, click **Query**.

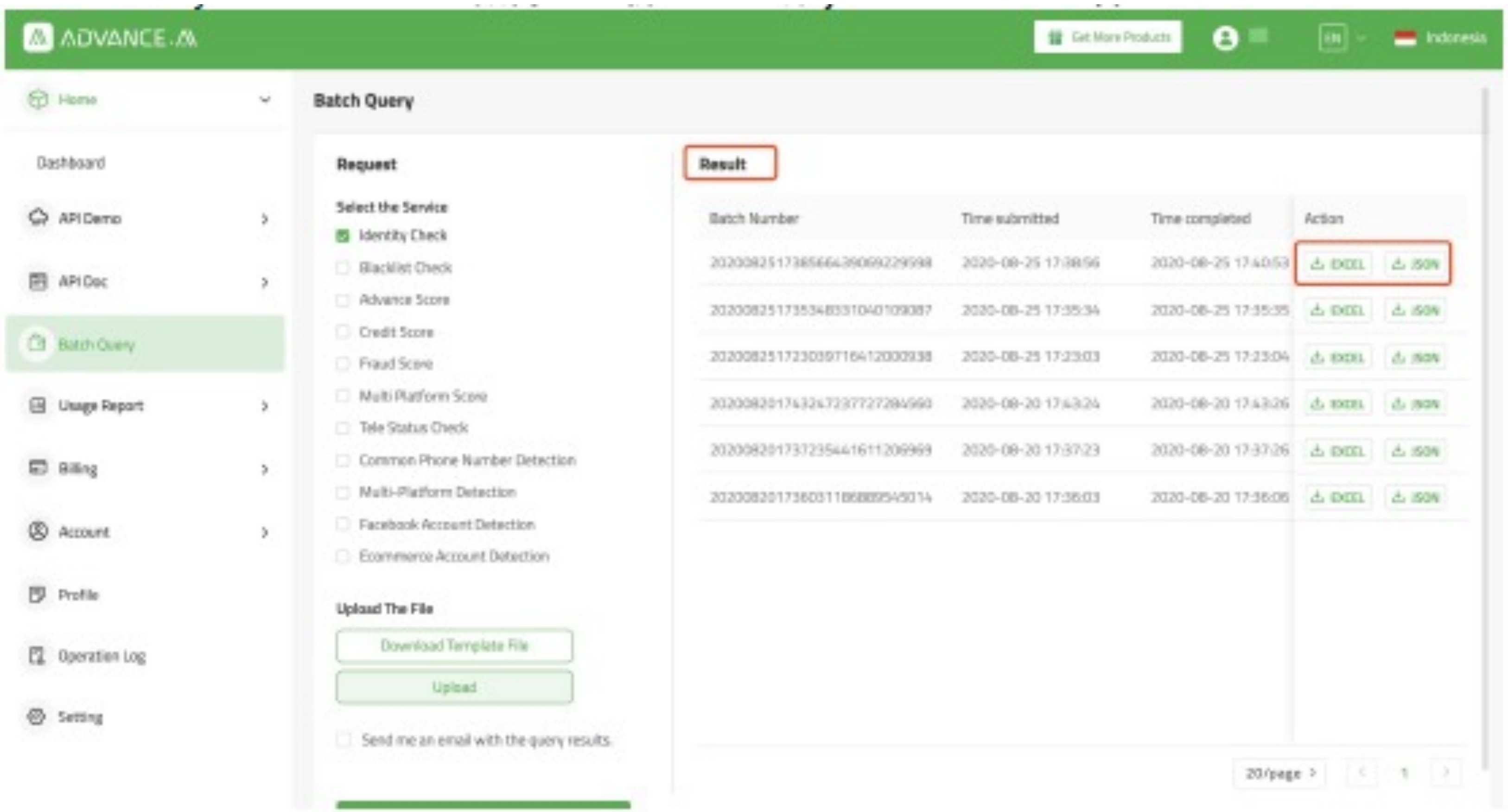


# Batch Query

Upload in Bulk

“How Do I Obtain the Batch Query Result?”

1. Choose **Batch Query** > **Result.**
2. Click the desired result format (**EXCEL** or **JSON**) to download the result file.

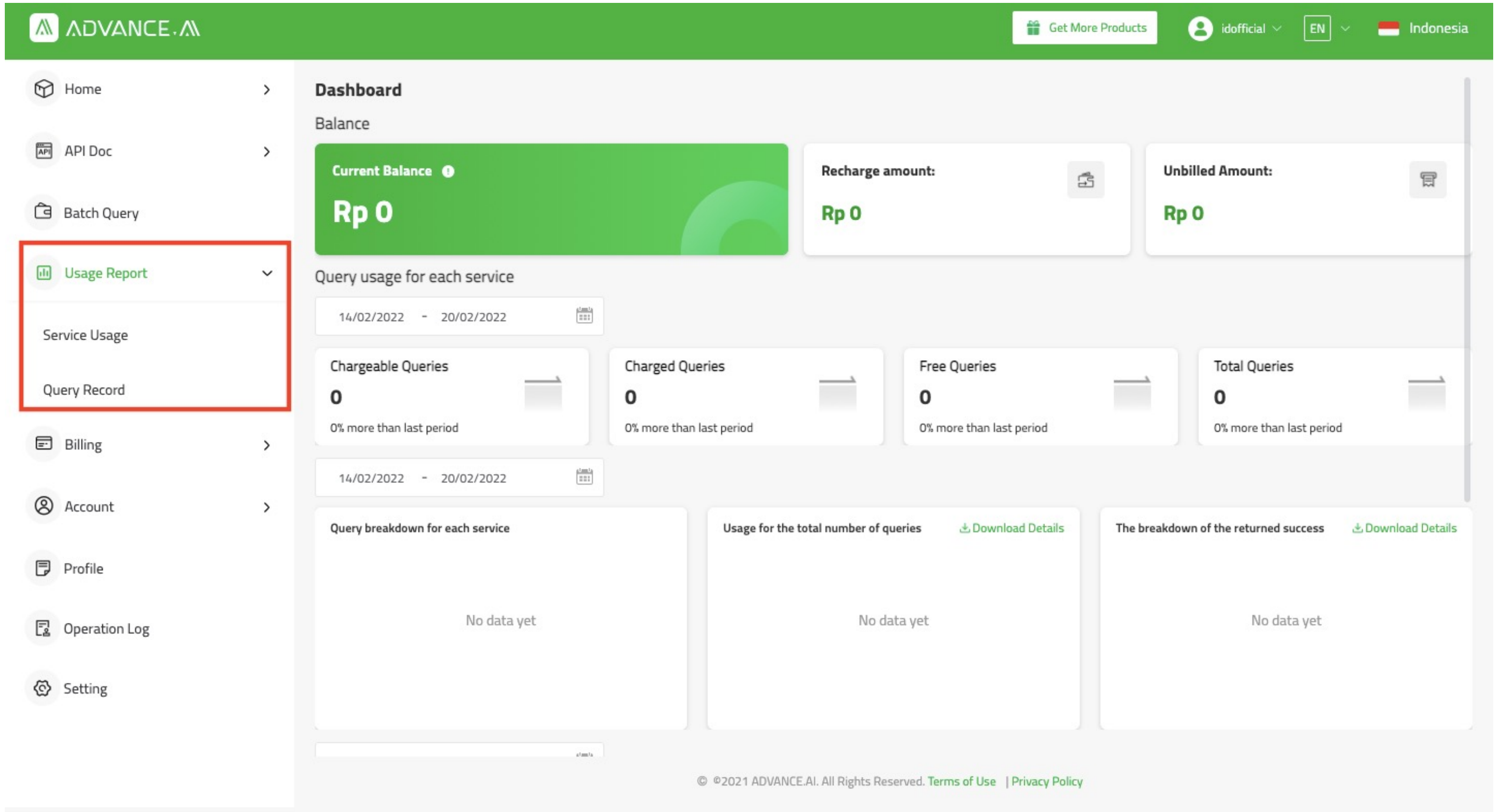


# Checking Usage / Transactions

Usage & Record

1. Visit https://in.advance.ai
2. Click on the left side "Usage Report"
3. There will be dropdowns for:
   a. Service Usage
   b. Query Record

In this section, users can check the usage and breakdown of transactions made.

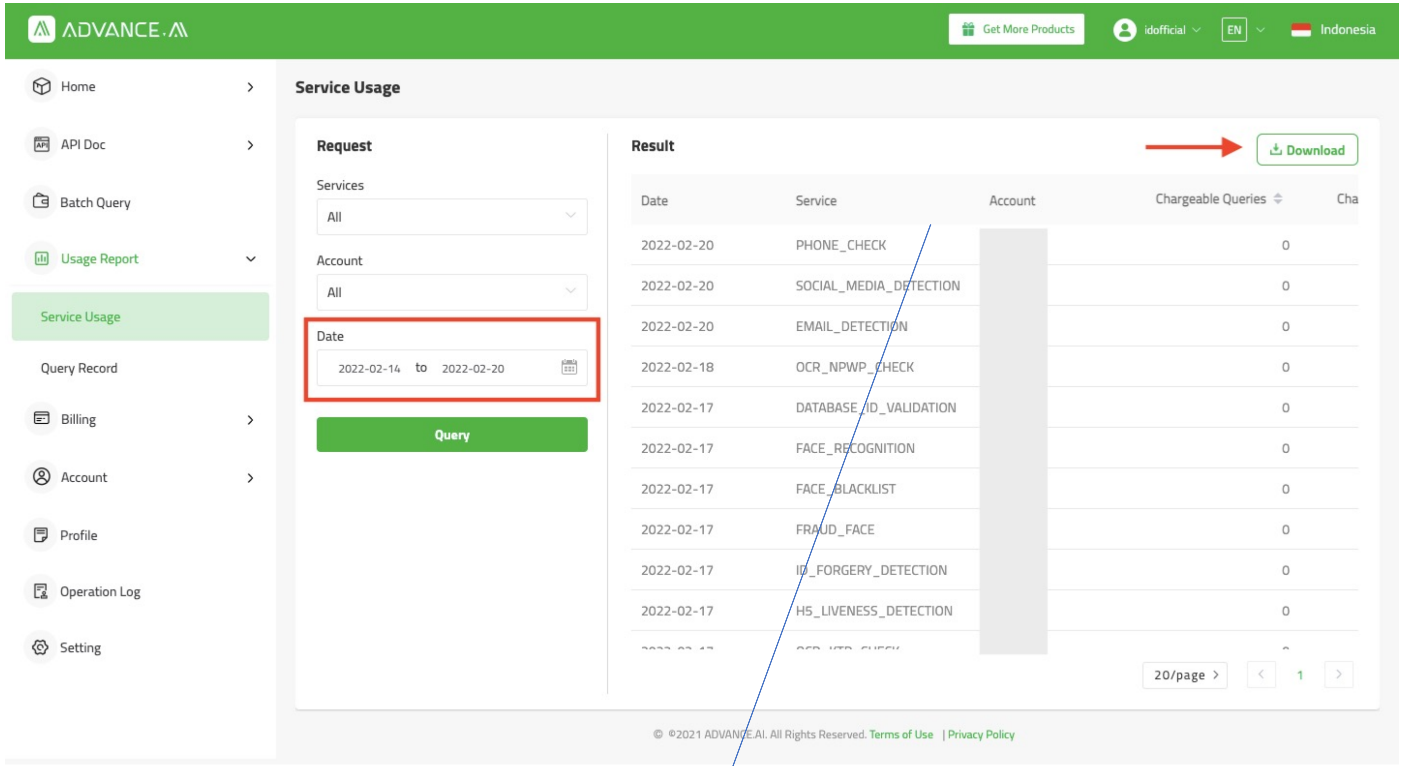


# Usage Report: Service Usage

Usage & Record

"How do I check if my transactions are free or paid?"

1. Visit https://in.advance.ai
2. Click on the left side "Usage Report"
3. Click on "Service Usage"
4. Filter based on date/time you want to check
5. Click download if necessary




**Glossary:**

| | |
|---|---|
| Service | The product being used |
| Account | The account that made the call |
| Chargeable Queries | Displays how many transactions return with "Pay" result |
| Charged Queries | Displays the actual number of calls |
| Free Queries | Free transactions (Free of charge) |
| Total | Includes all types of queries (Free & Pay) |

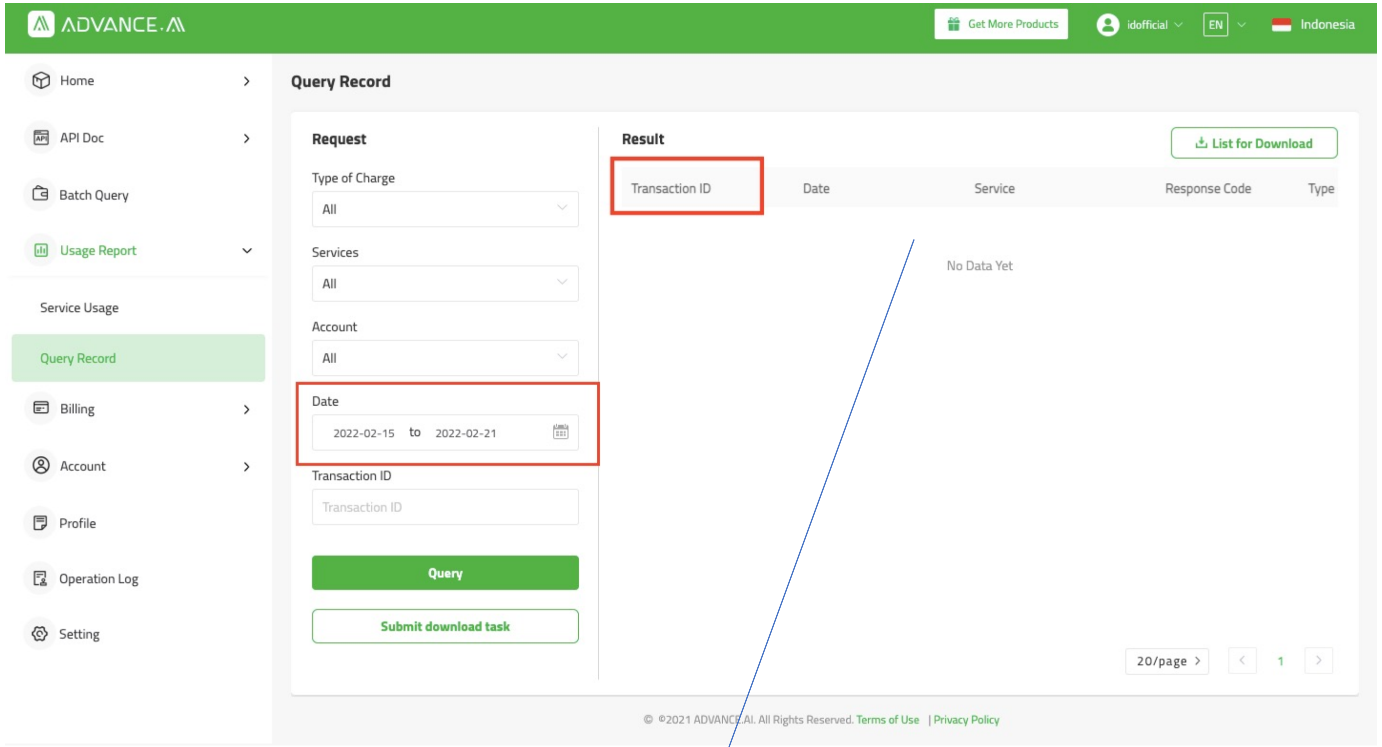
# Usage Report: Query Record

Usage & Record

"How do I check if the transactions made is *Success* / *Error*?"

1. Visit https://in.advance.ai
2. Click on the left side "Usage Report"
3. Click on "Query Record"
4. Filter based on date/time you want to check
5. Click download if necessary

Note: *TransactionID* is a vital part to raise questions to ADVANCE.AI tech engineers team. Please share the *TransactionID* along with issues found to our team for further investigation.




**Glossary:**

| | |
|---|---|
| TransactionID | Unique numbers allocated for each transactions |
| Service | The product being used |
| Response Code | The return result of transactions |
| Type of Charge | Displays Free or Pay |
| Account | The account that made the call |

# Usage Report: Query Record (Detailed)

Usage & Record

"How Do I Query Call Logs?"

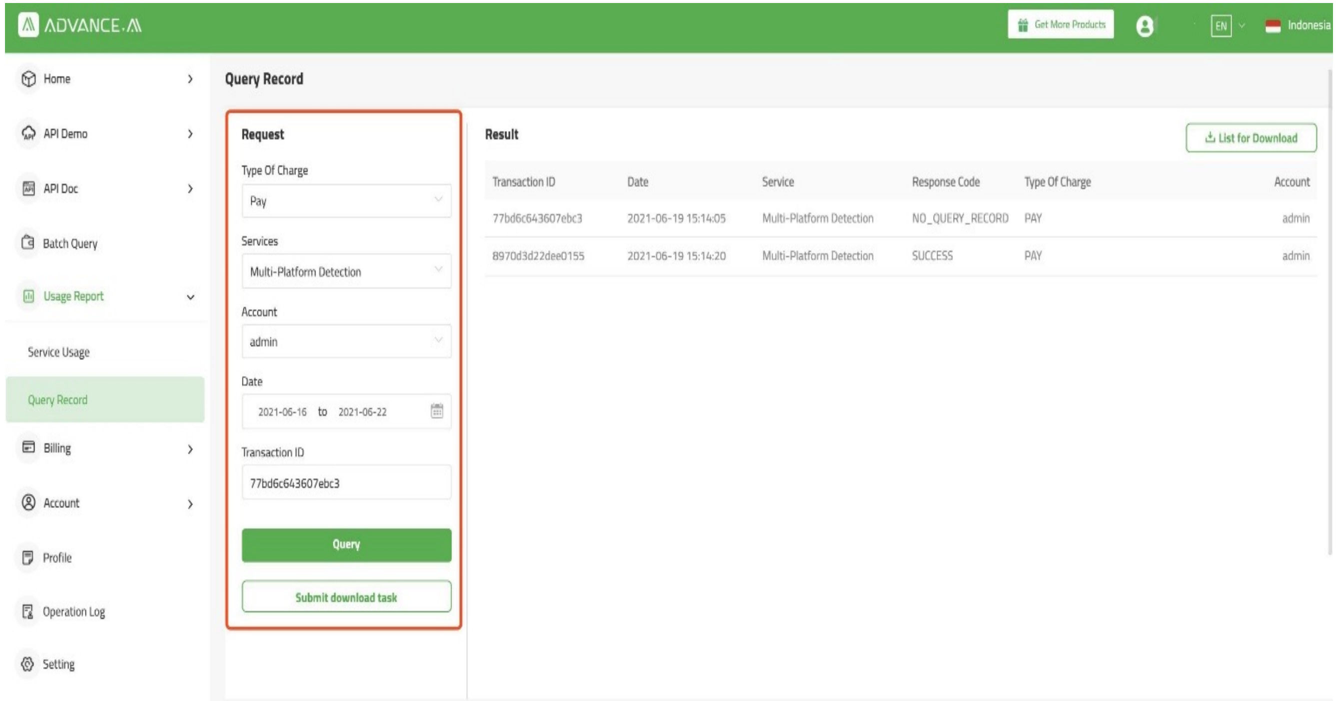
Choose **Query Record** > **Request** and select:

- type of charge (pay/free),
- service,
- account a period (the past 7 days by default),
- enter a transaction ID to perform the query.

Note: To query logs for a period, match the query criteria based on needs and click **Query**.

To download the query result:

1. Click **Submit download task** first,
2. Then click **List for Download** to download the result of the current or previous query.



# Billing

Billing/Invoicing

"What does this section show?"

- Balance: You can query your current balance, recharge record, daily spending, and monthly spending.

- Bill: You can query the bill of any month in the past.

- Order: You can upload a recharge certificate to recharge your account.

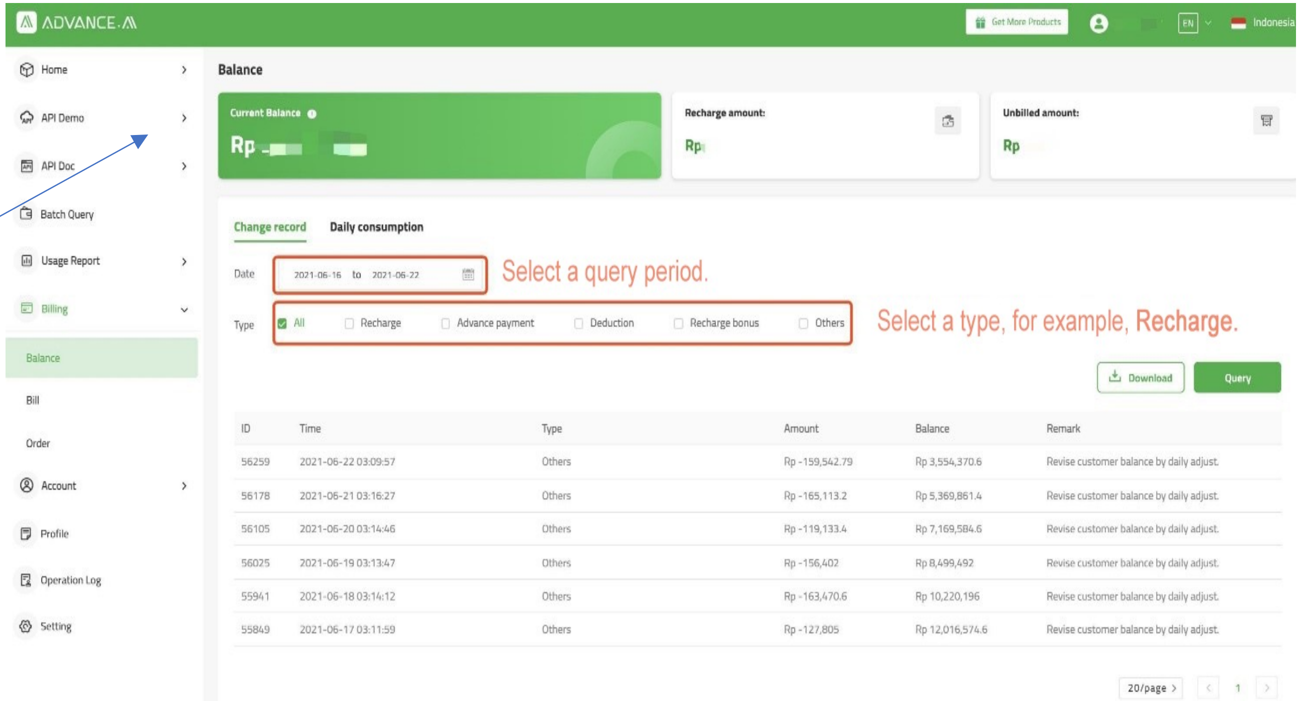
**Parameter Description**

- Current Balance: Your current balance.

- Recharge amount: Your balance at the beginning of the current month (Balance of the previous month + Recharge/deduction in the current month)

- Unbilled amount: Unbilled amount in the current month.

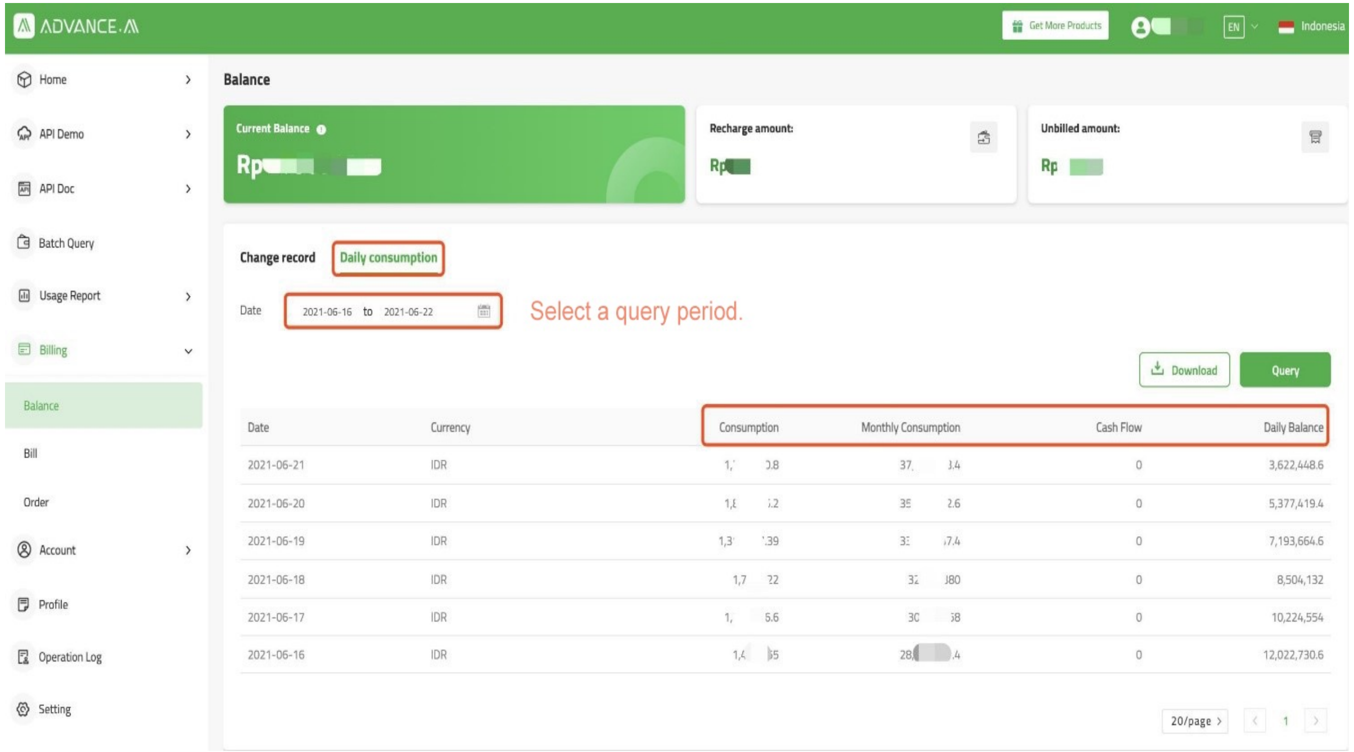
- Change record: You can query all historical balance changes.



# Billing - Balance

Account Balance

"How Do I Query the Daily Spending?"




## Parameter Description

- Daily consumption: You can query your daily spending and monthly spending.
- Consumption: The daily spending.
- Monthly Consumption: The monthly spending.
- Cash Flow: The recharge amount of the day.
- Daily Balance: The balance as of a specific day.

# Billing - Bill

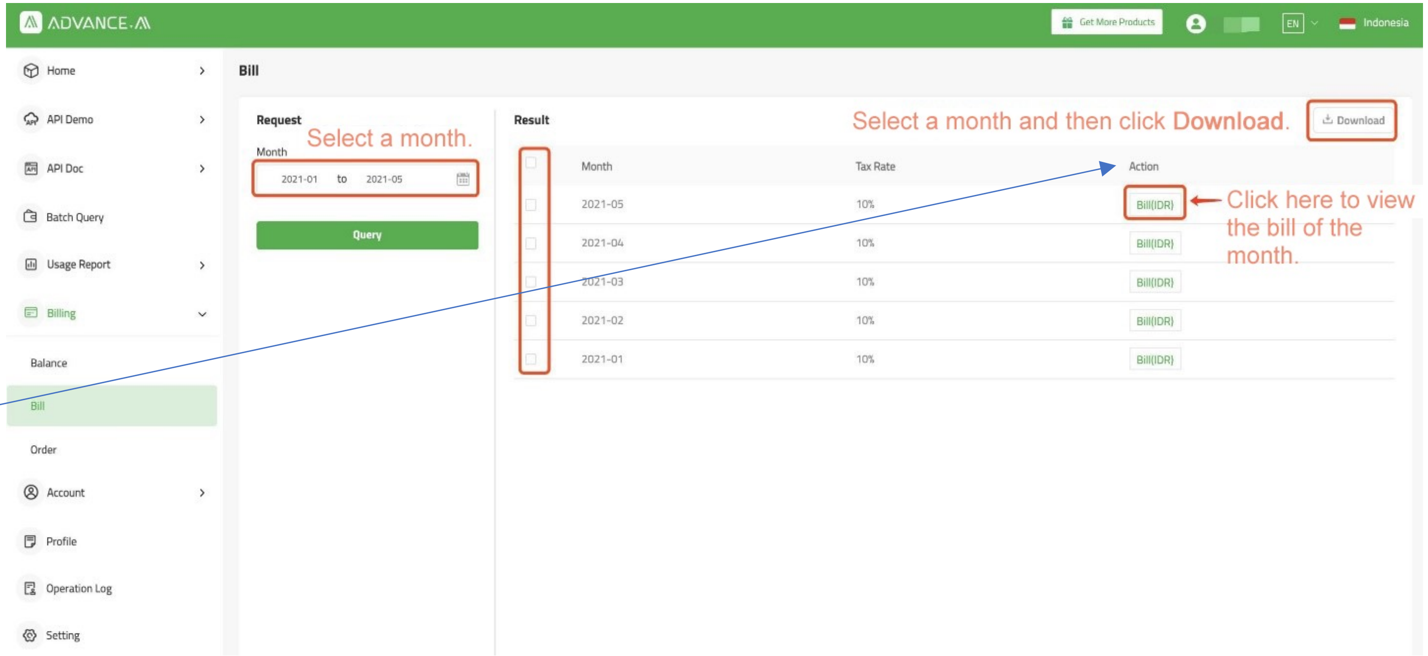
Invoices/Bills

“How Do I Query My Billing Records?”

1. Choose **Bill** > **Request** and select a month.

2. Click **Query**.

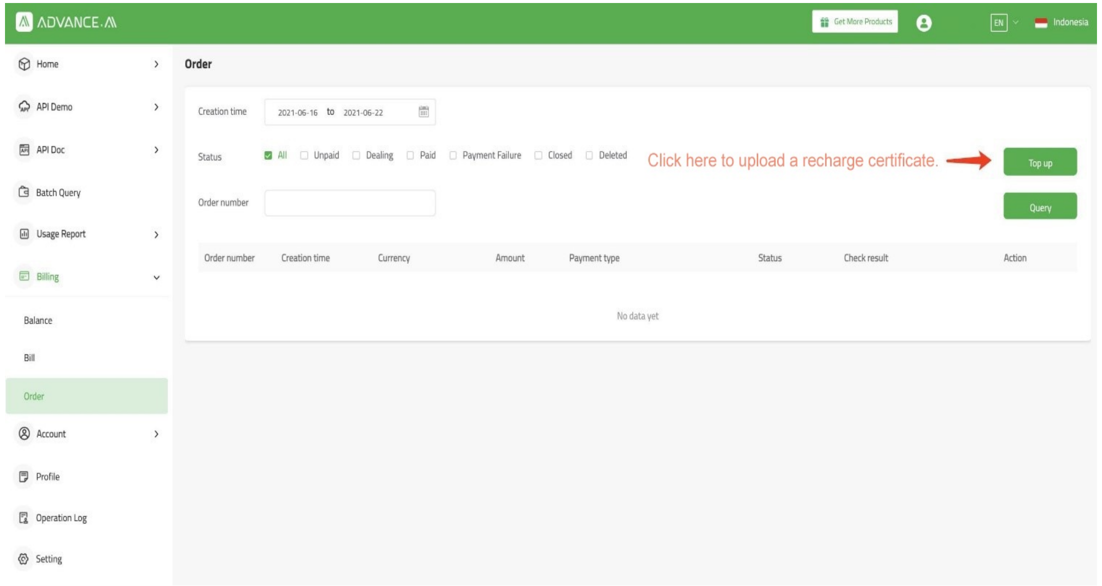
To download the query result, click **Download** in the upper right corner.



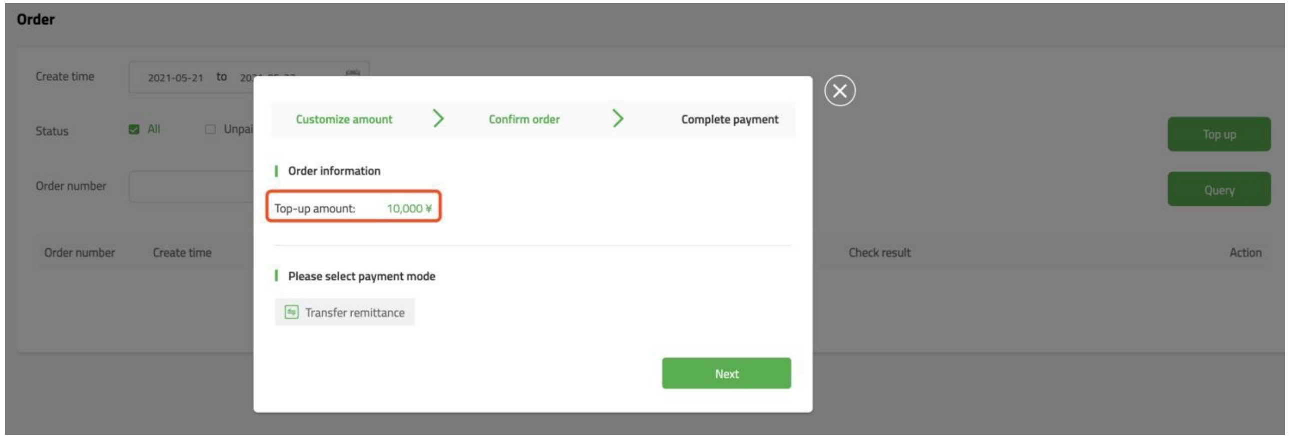
# Billing - Order

Payment Proof

"How Do I Upload a Recharge Certificate?"




1. Click **Top up** to upload a recharge certificate.
2. Choose a recharge amount.
3. Confirm the recharge amount.
4. Confirm the recharge account.
5. **Click to upload** to upload the bank transfer proof and click **Submit**.



# Billing - Order

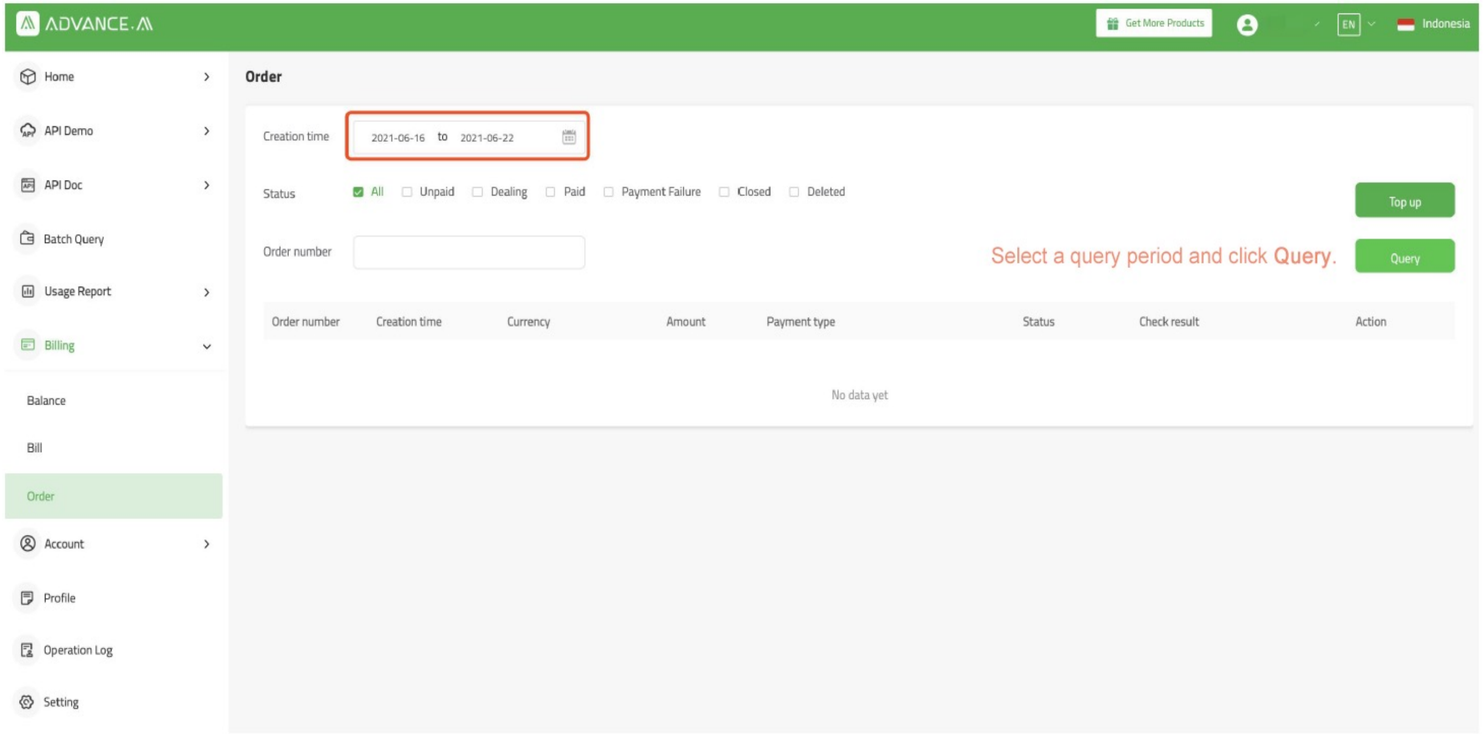
Top Up History

"How Do I Query My Recharge Records?"

1. Select a query period (the time you would like to check).

2. Checklist the Status "All" or you can customize based on what you would like to see, such as those still being processed by our Finance Team.

3. Click **Query**.



# Account Management

Users & Keys

"How can I check my API KEYS?"

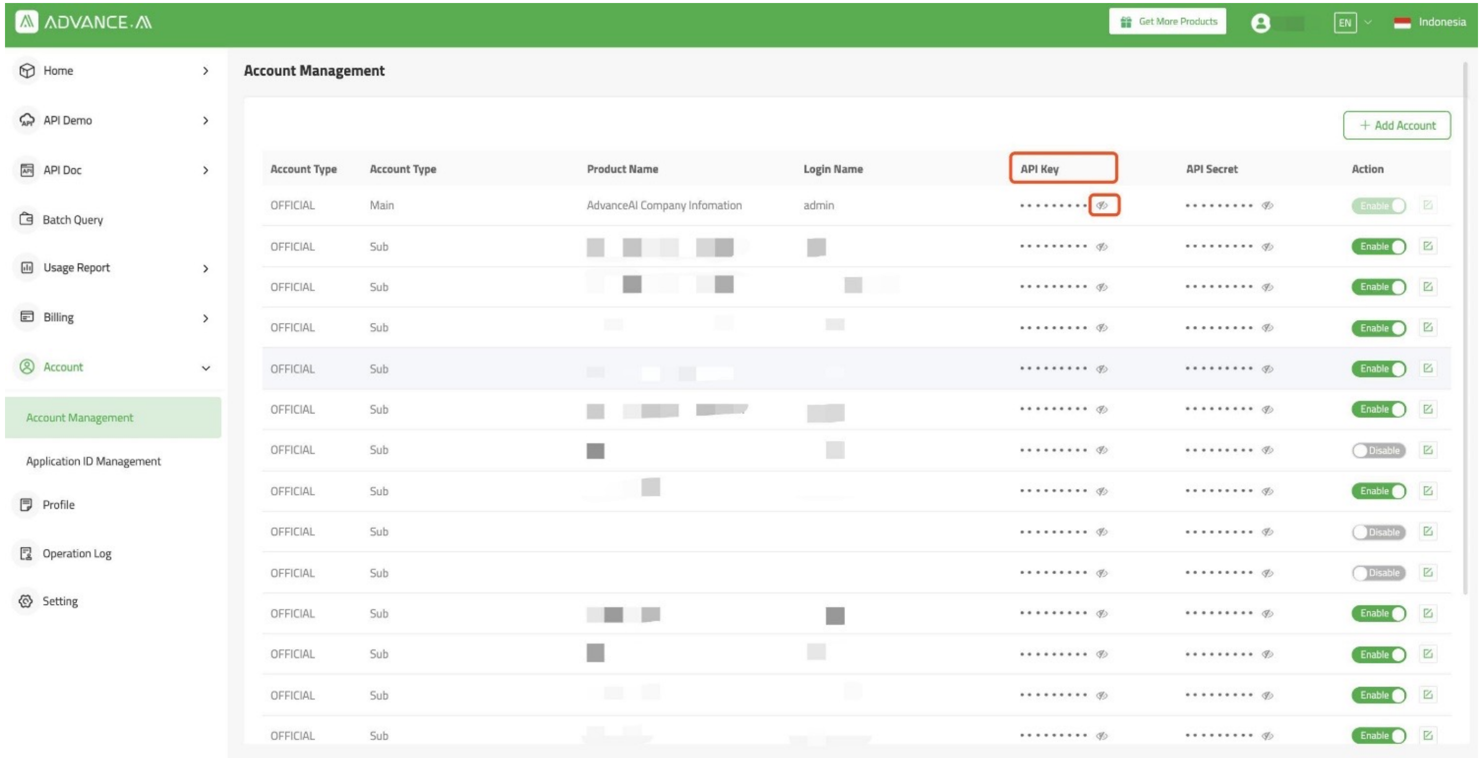
## Checking API Keys

- Choose **Account** > **Account Management** and click the eye icon in the API Key column to view the API key.

## Parameter Description

- Account Management: You can check the API keys and add sub-users.

- Application ID Management: You can check the SDK keys and the package names.

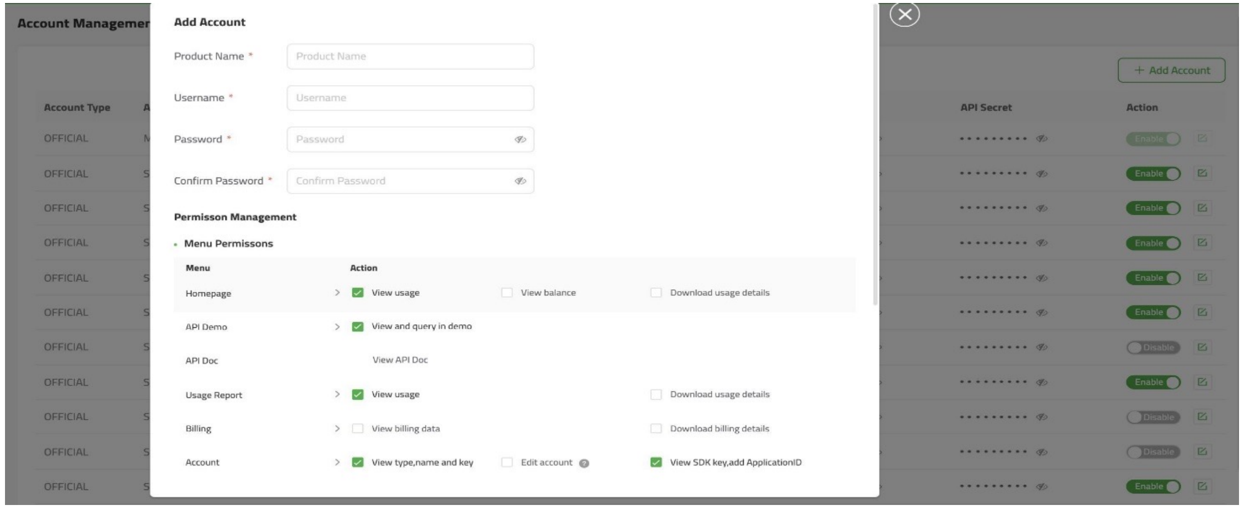


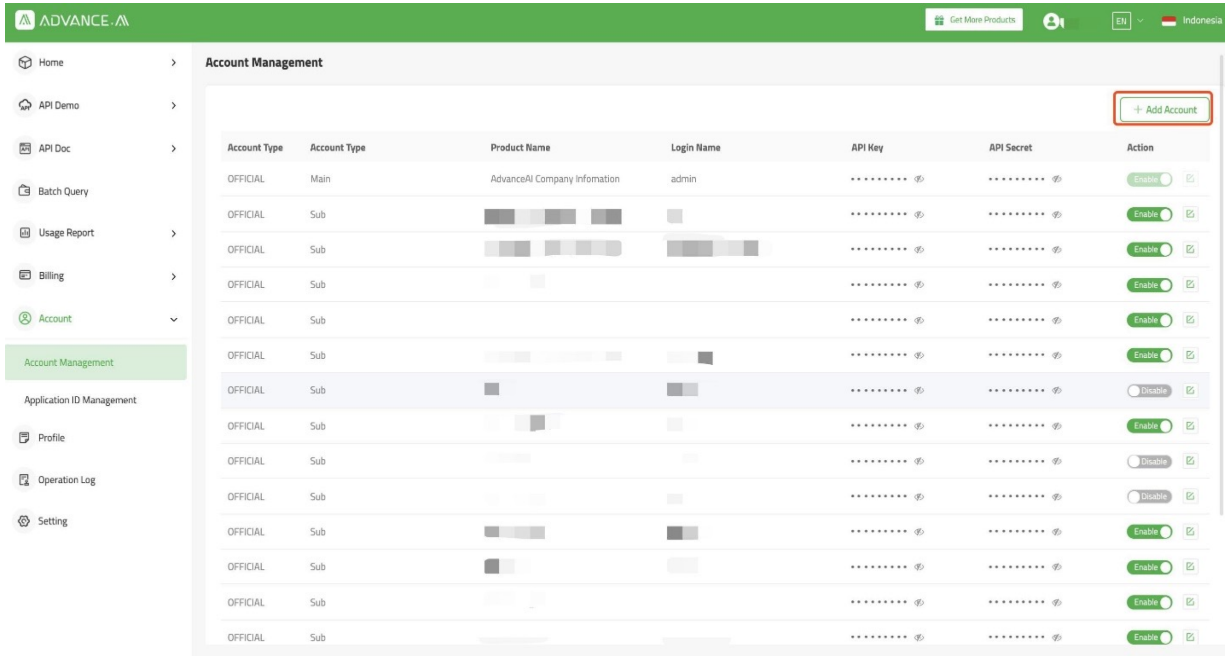
Users & Keys

# Account Management

"Can I Add New Sub-Users? If Yes, How?"

1. Choose **Account** > **Account Management**
2. Click **Add Account** in the upper right corner.
3. Fill in Product Name & Username for the sub users. Product Name can be your internal project name. Username is used to login to the portal.
4. Set and confirm password.
5. You can assign corresponding user permissions to the account and limit their access to the usage. Do **tick** on the "action part" if you want to grant access.
6. Click submit.



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# Account Management

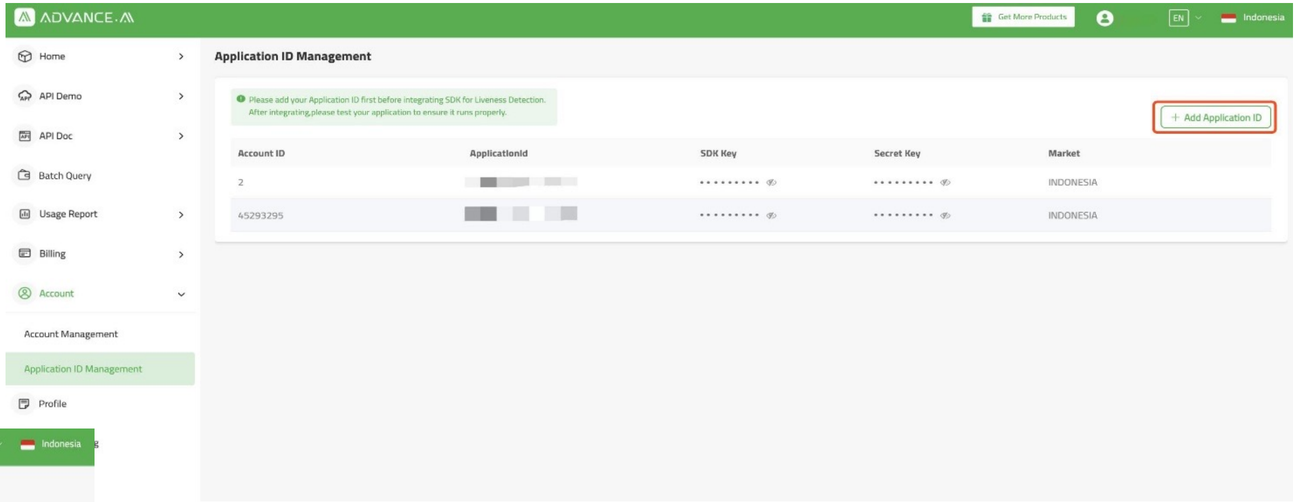
AppID & SDK Key

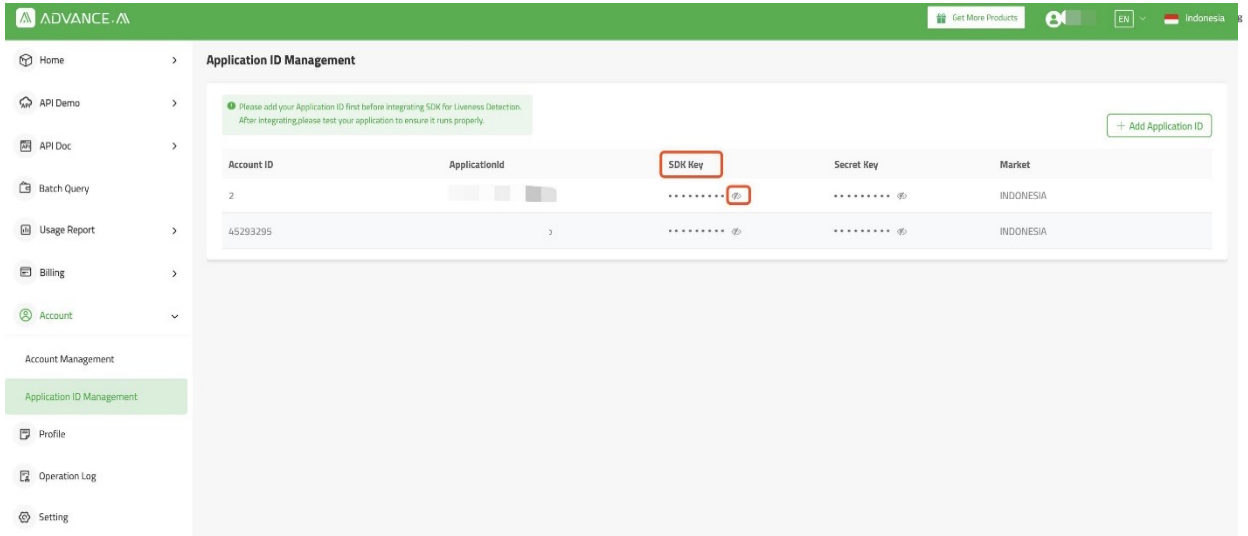
## "How Do I Add Applications for Liveness Detection?"

1. Choose **Account** > **Application ID Management.**

2. Click **Add Application ID** in the upper right corner.

Note: Do not use spaces when entering an application ID. Separate application IDs with a comma. Check whether the liveness detection service is available for the application that is added.




## "How Do I Obtain the SDK Key?"

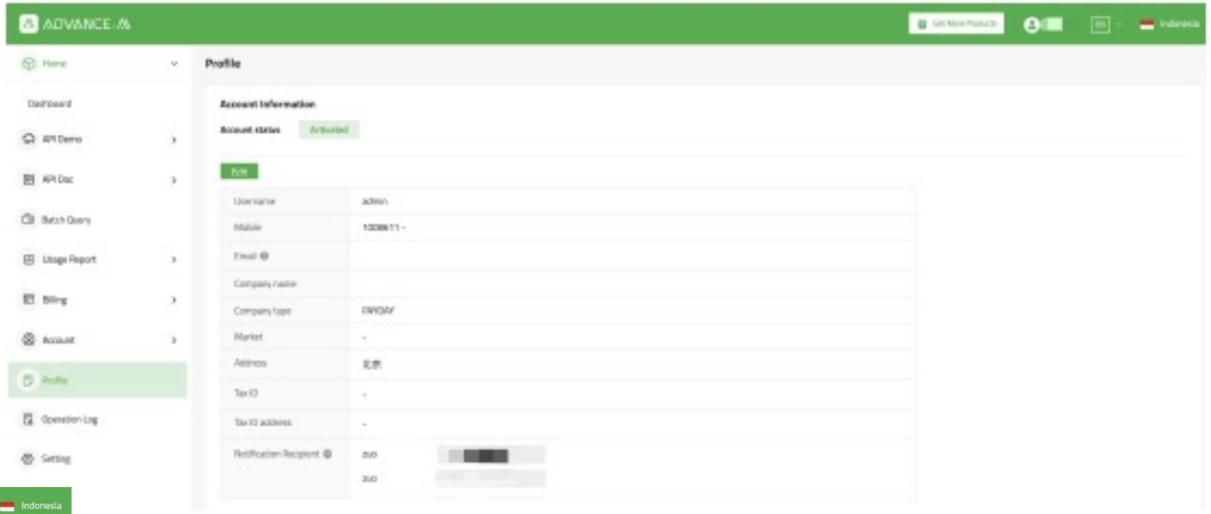
After adding an application, you will obtain the SDK key. You can click the eye icon in the SDK Key column to view the SDK key.

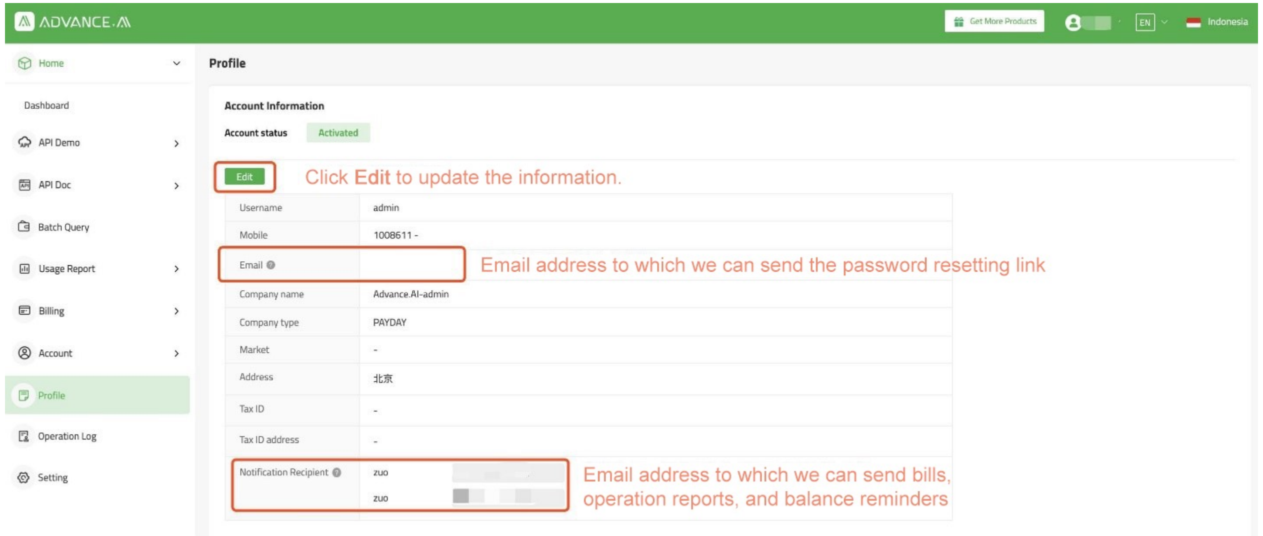
# Profile – Account Information

Account Info

"How Do I Check My Basic Account Information?"

1. Click **Profile**.
2. The account information is displayed on the **Account Information** page.




"How Do I Update the Basic Account Information?"

We recommend that you maintain the basic information of your account regularly, so that you can receive our emails in time.

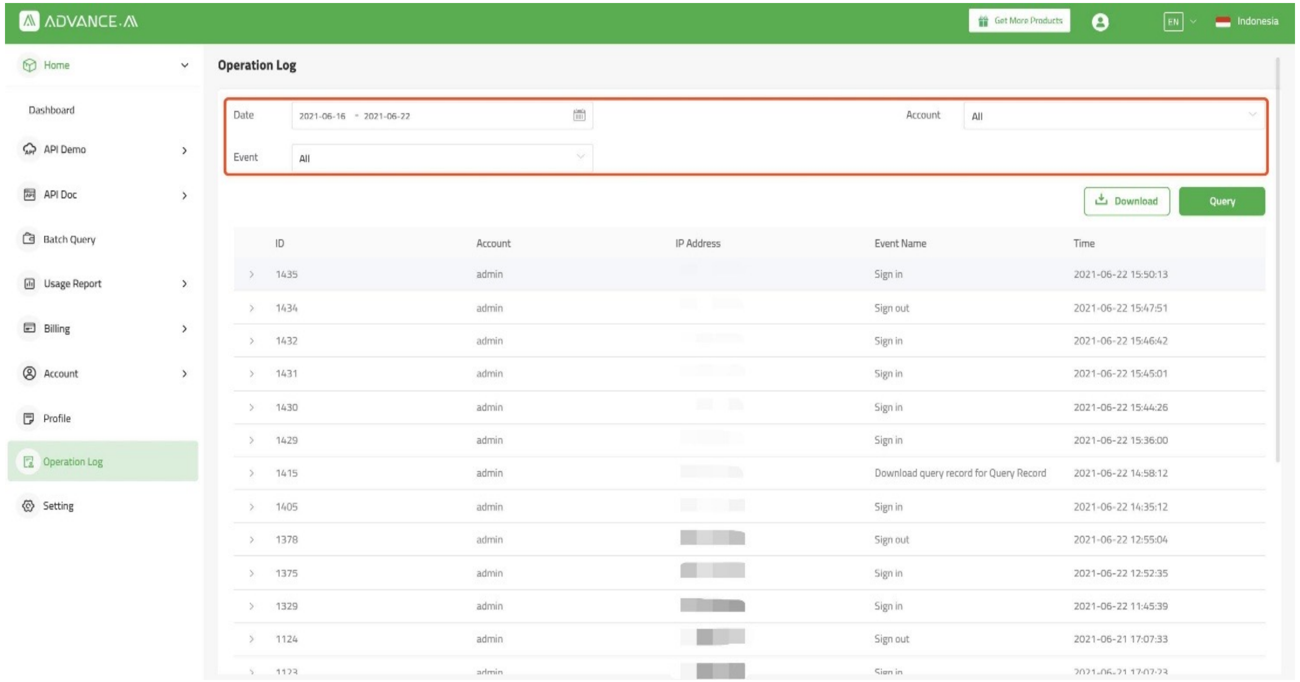
1. Click **Profile**. On the **Account Information** page that appears, click **Edit**.
2. Update the following information regularly.

# Operation Logs

Account Logs

"How Do I Check My Basic Account Information?"

You can query and download the operation logs by date, account, and module.

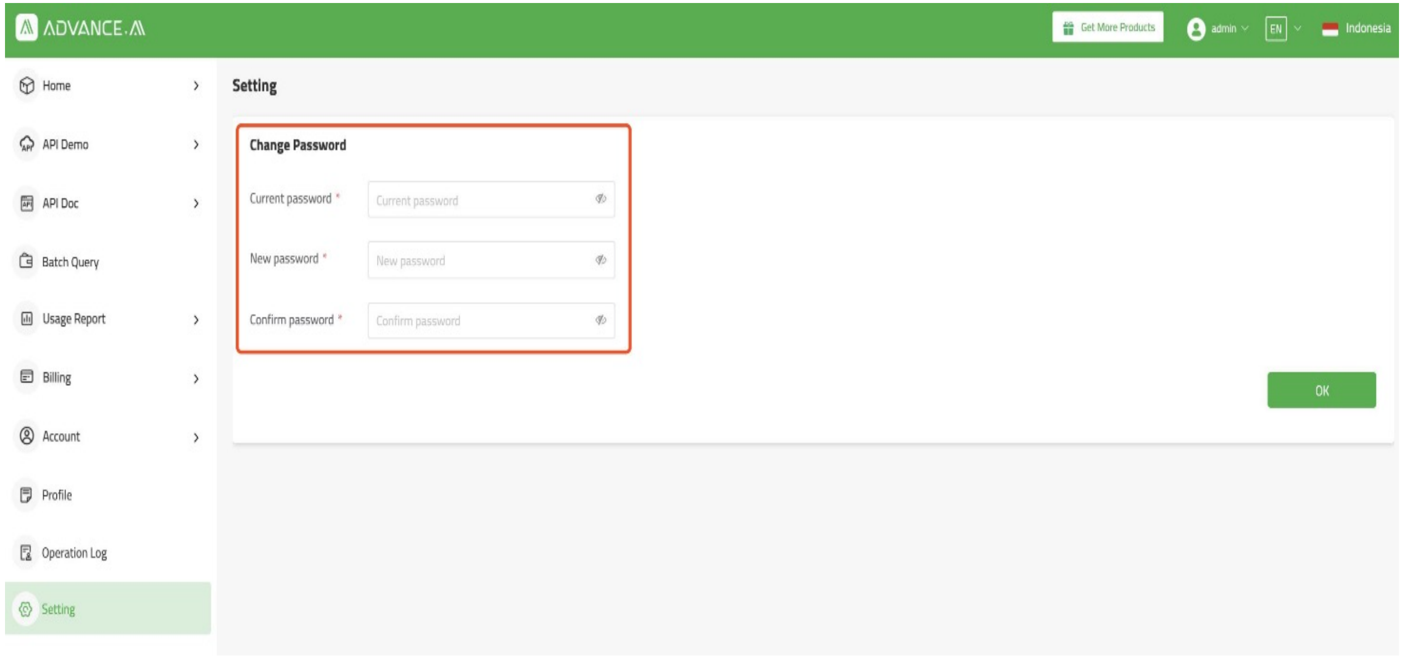


Password

# Setting – Change Password

"How Do I Change My Password?"

1. Click **Settings**.
2. On the **Change Password** page that appears.
3. Enter your current password in **Current password**, the new password in **New password.**
4. **Confirm password**
5. Click **OK**.

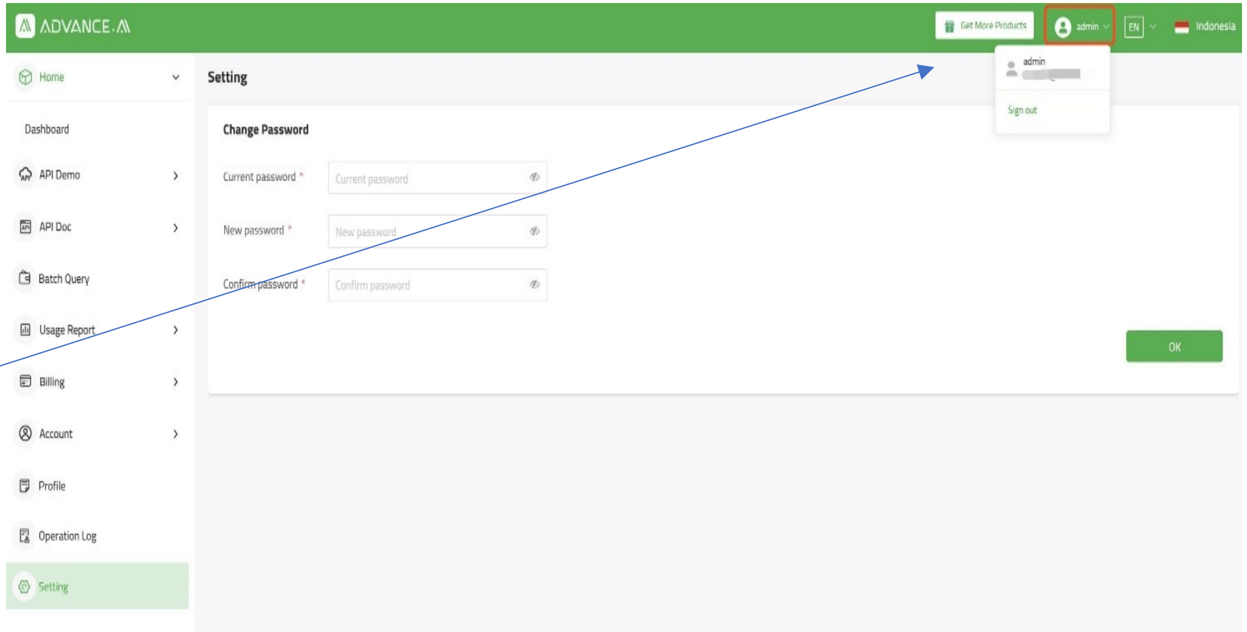


# Setting – Change Password

Signing Out

"How Do I Sign Out from an Account?"

1. Click the account name in the upper right corner.
2. Click **Sign out** to go back to the **Login** page.



# THANK YOU

- Operation Team –

For more questions, please do not hesitate to reach out to us at
aai.regional.ops@advancegroup.com