Vendor Training

Participants

- Cedric White – Ocean Lakes Family Campground
- Tracy Wright – Ocean Lakes Family Campground
- Leigh Maney – Ocean Lakes Family Campground
- Brooke Blashford – Ocean Lakes Family Campground
- LouCin– SymLiv
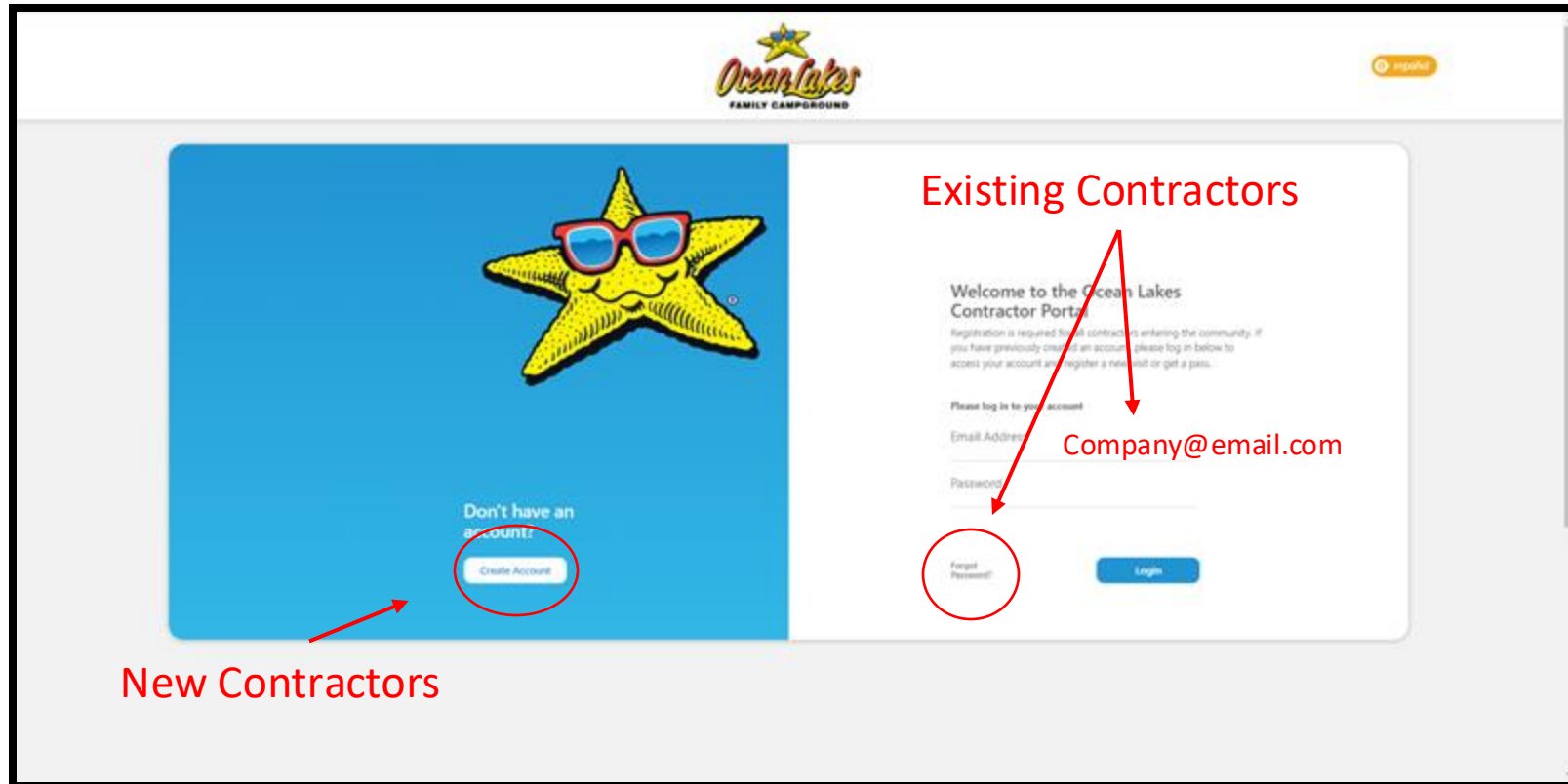- Pete Lee – SymLiv

Contractor Access

❑ <u>Lesson 1</u>: Create a User Account

❑ <u>Lesson 2</u>: Register Your Company

❑ <u>Lesson 3</u>: My Company Profile

❑ <u>Lesson 4</u>: Purchase a Pass (**Badge**)

❑ <u>Lesson 5</u>: My Passes

❑ <u>Lesson 6</u>: Review Community Rules

❑ Customer Support

Lesson 1: Create a User Account

➢ **Existing Contractors will claim their accounts using the "Forgot Password" feature**

  1) Input your account email in the "Email Address"

  2) Click on "Forgot Password"

➢ **New Contractors will select Create Account**

  1) Select "Create Account"

> **Existing Contractors** will claim their accounts using the "Forgot Password" feature

1) Input your account email in the "Email Address"

2) Click on "Forgot Password"
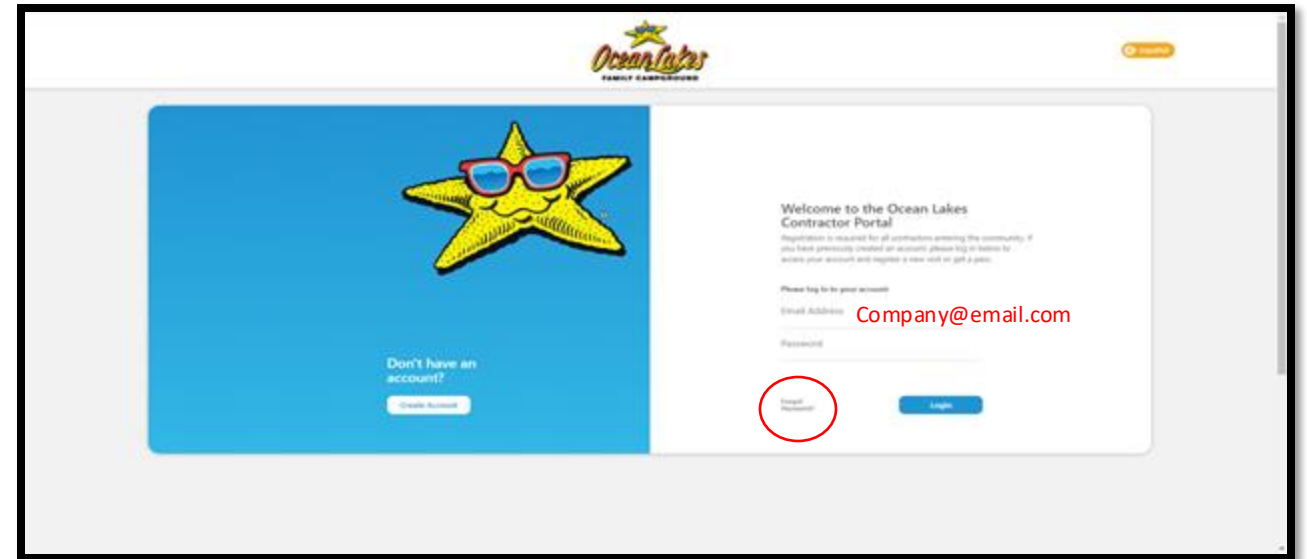
1) Input your account email in the "Forgot Password" email field
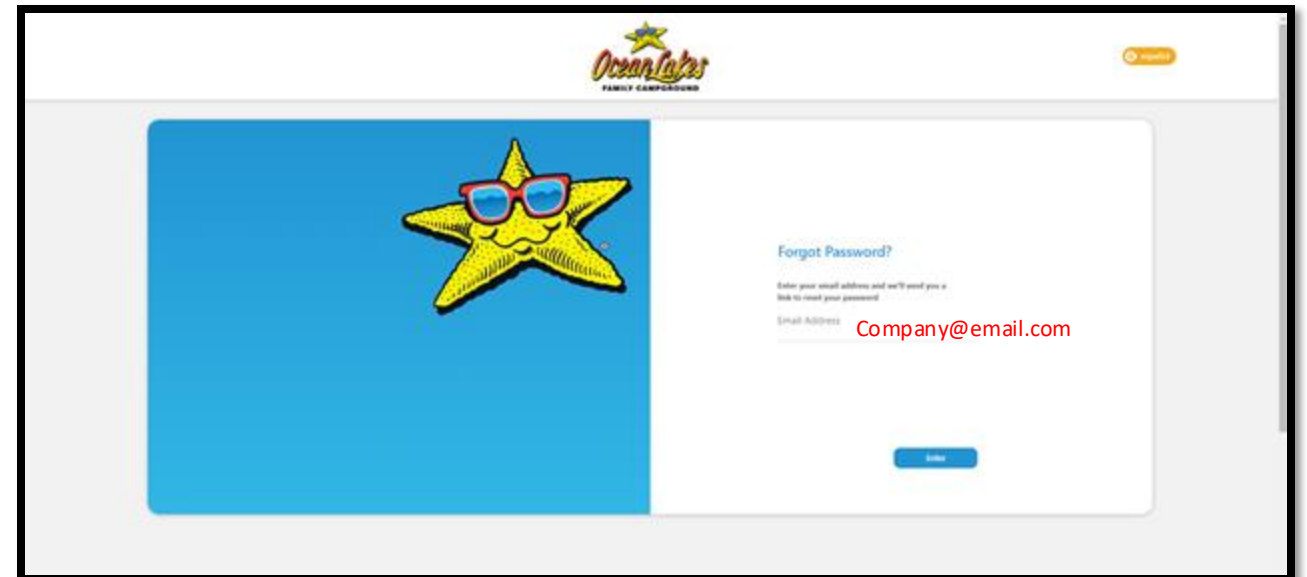
Lesson 1: Create a User Account

4) Check your email for "Reset Password" email [*if no email make sure to check your Spam folder*]

5) From the email, type or copy the code into the "Verification Code" field and select "Enter"

4) Next, enter your new password and confirm your password with matching entries.

5) Upon completion, you will be redirected to the Log-In page.

➢ **New Contractors will "Create an Account"**

1) Click on the "Create Account"

Note: This is a User Account recommended for the individual processing and managing the access badges for a company.

2) Complete each of the text fields
   a. First Name
   b. Last Name
   c. Email Address
   d. Password
   e. Verify Password

Note: The Email Address is the establishes the account and can not be changed; recommend using a generic email not tied to a specific individual.
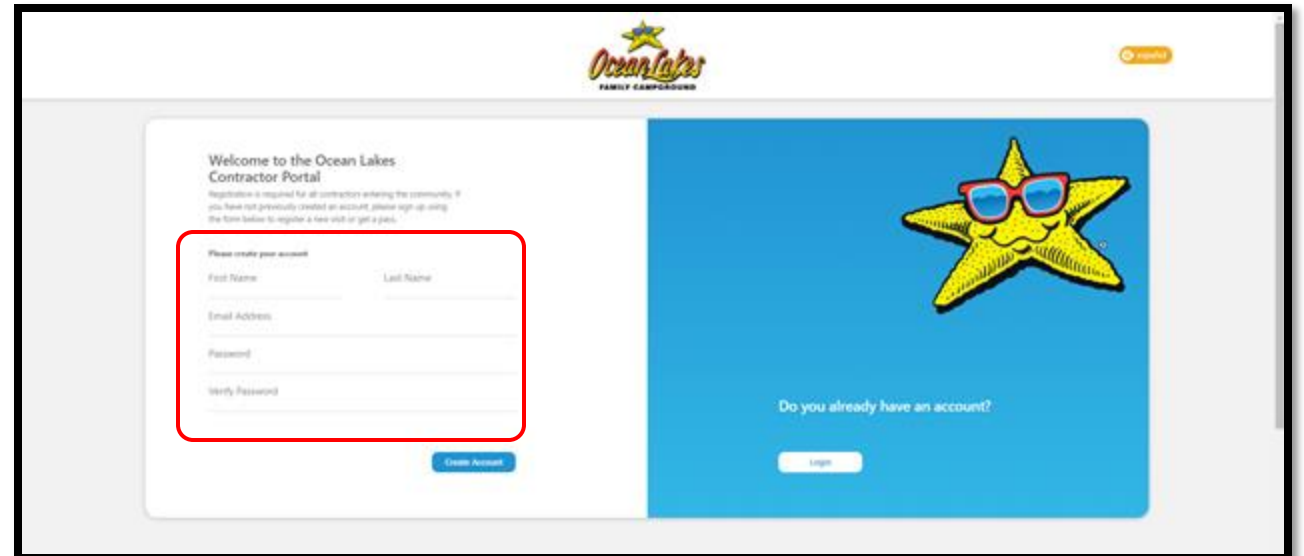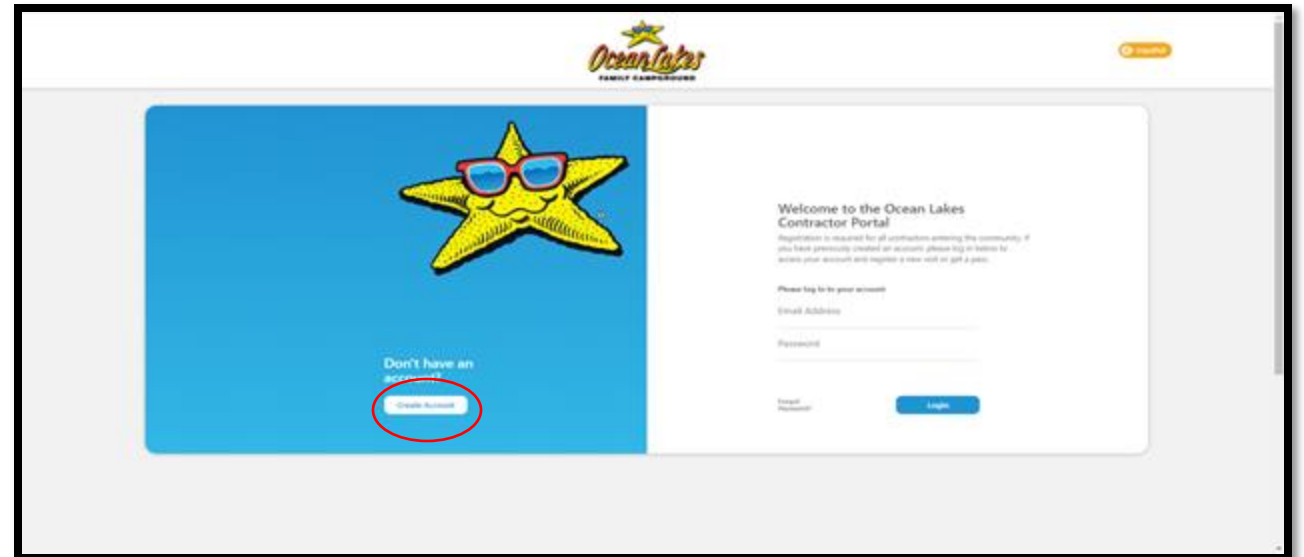
➤ **Next Lesson: Register Your Company**

➢ **Four-Step Process**

- ▪ **Step 1: Register Your Company**

- ▪ Step 2: Community Orientation

- ▪ Step 3: Upload Documents

- ▪ Step 4: Secure Check Out

Four-Step Process

- Step 1: Register Your Company

- **Step 2: Community Orientation**

- Step 3: Upload Documents

- Step 4: Secure Check Out

➢ **Four-Step Process**

▪ Step 1: Register Your Company

▪ Step 2: Community Orientation

▪ **Step 3: Upload Documents**

▪ Step 4: Secure Check Out

Note: "Pending Review" status

> ## **Four-Step Process**
>
> - Step 1: Register Your Company
>
> - Step 2: Community Orientation
>
> - Step 3: Upload Documents
>
> - **Step 4: Secure Check Out**

➢ **Stripe Payment Processor**

  ▪ Can save CC information

➢ **Thank You for Registering!!**

- Contractor Receipt
- Pending Admin Review / Approval
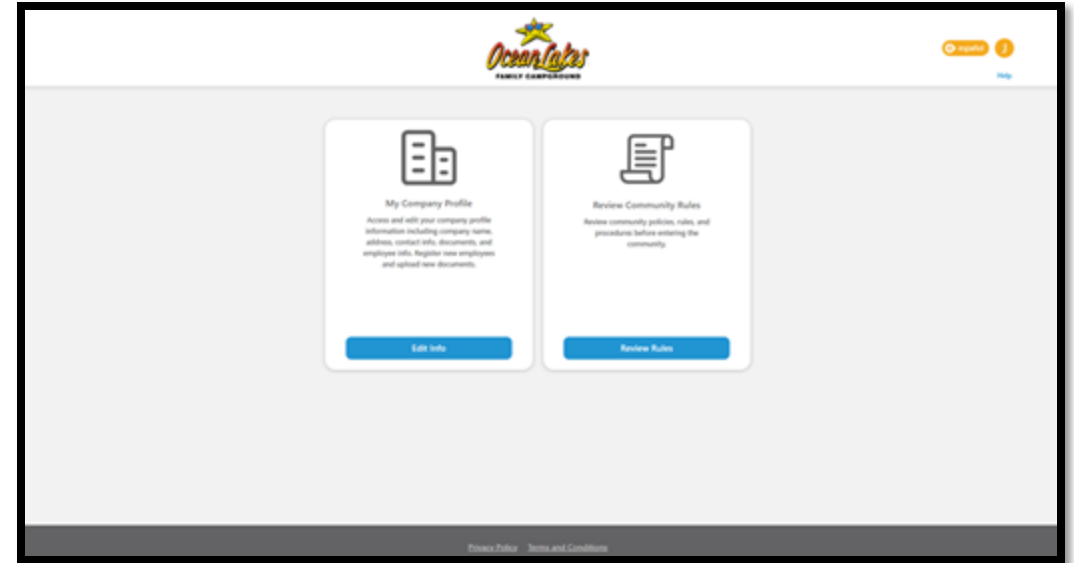
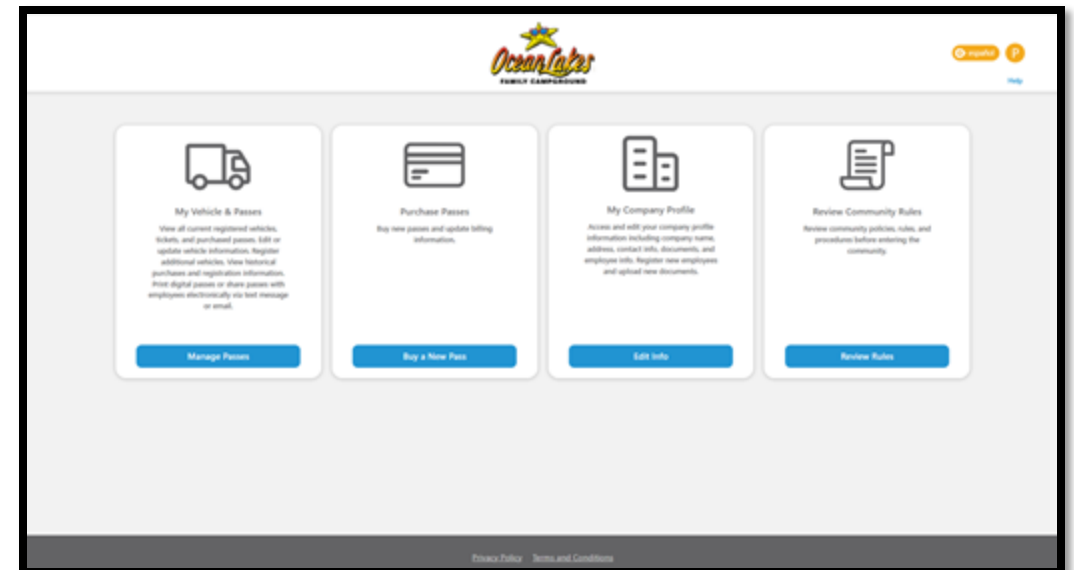➤ **Next Lesson: My Company Profile**
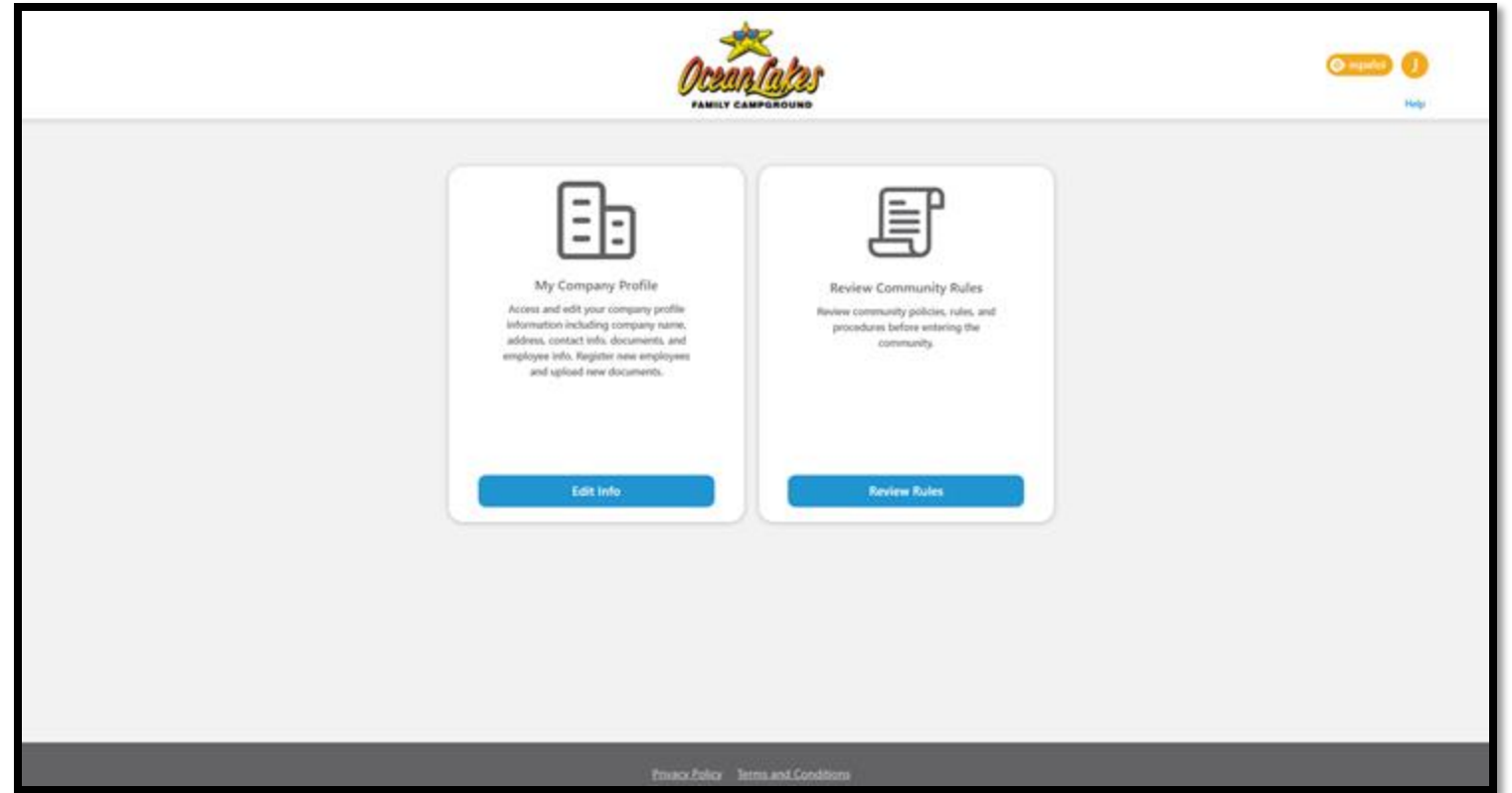
Lesson 3: My Company Profile

Account (Unapproved)

- Compliance will review and approve
- Contractor will receive notification of approval

Account (Approved)

- My Company Profile
- Purchase Passes (Badges)
- My Vehicles and Passes
- Review Community Rules

➢ **Account (Approved)**

  ▪ **My Company Profile**

  ▪ Purchase Passes (Badges)

  ▪ My Vehicles and Passes

  ▪ Review Community Rules

➢ **Company Profile**

▪ **Company Profile**

▪ Company Documents

▪ Employees

▪ Vehicles

▪ **Within Company Profile**

▪ Business Information

▪ Primary Company Contact

▪ Emergency Company Contact

▪ **"Save Changes"**

- ➢ **Company Profile**
  - ▪ Company Profile
  - ▪ **Company Documents**
  - ▪ Employees
  - ▪ Vehicles

- ▪ **Actions:**
  - ▪ Ability to View/Download
  - ▪ Ability to Delete
- ▪ **Add Document:**
  - ▪ Document Name (text)
  - ▪ Document Type (dropdown)
  - ▪ Browse files for upload
  - ▪ Upload Documents

Lesson 3: My Company Profile

- ➢ **Company Profile**
  - ▪ Company Profile
  - ▪ Company Documents
  - ▪ **Employees**
  - ▪ Vehicles

- ▪ **Actions:**
  - ▪ Ability to View
  - ▪ Ability to Delete
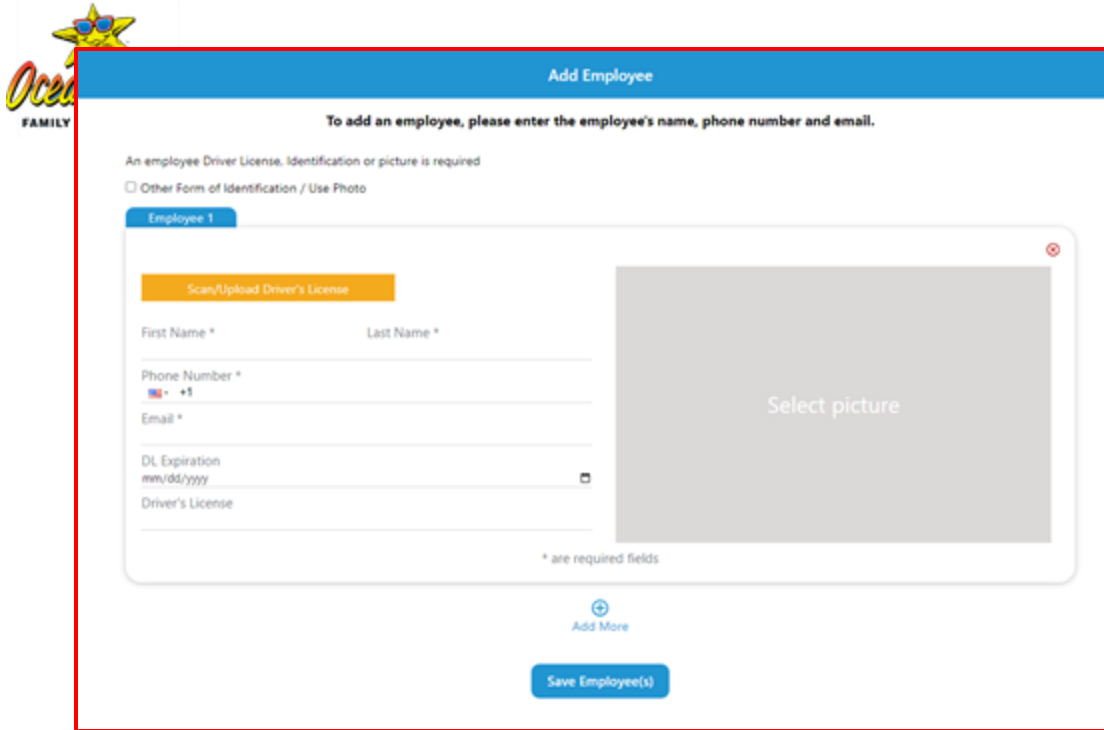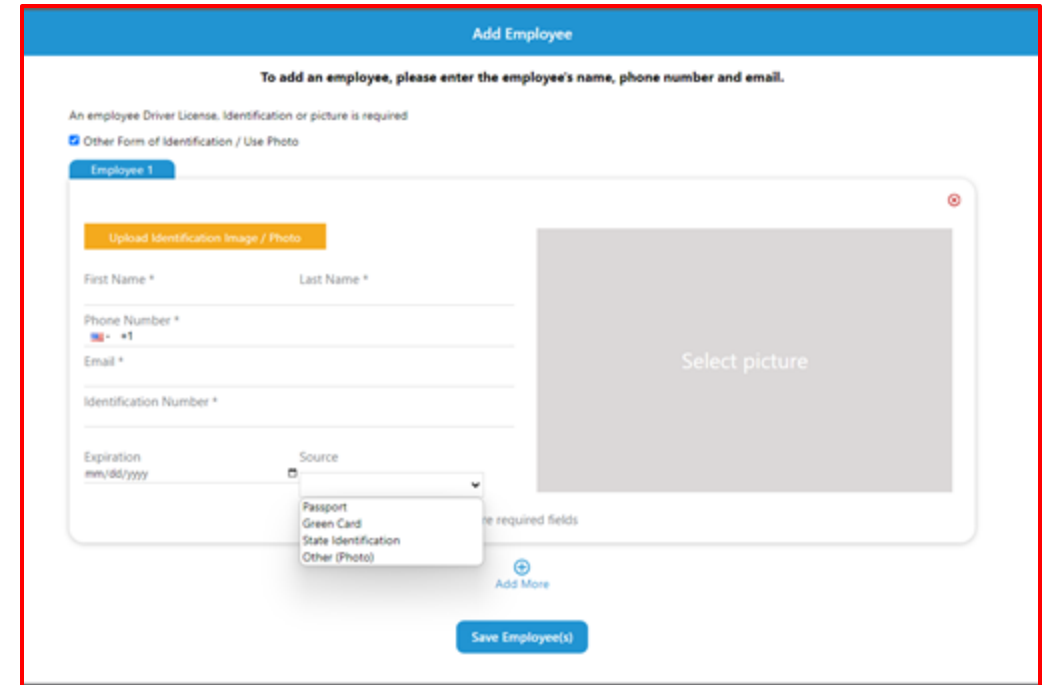
- ▪ **Add Employee:**
  - ▪ Next slide....

Lesson 3: My Company Profile

➢ **Add Employee: w/ Driver License**

    ▪ Upload picture of Driver License

    ▪ Input required information

➢ **Add Employee: Other Form of Identification**

    ▪ Upload picture of Identification

    ▪ Input required information

    ▪ Note: Compliance Office will review the information when a badge is purchased

- ➤ **Company Profile**
  - ▪ Company Profile
  - ▪ Company Documents
  - ▪ Employees
  - ▪ **Vehicles**

- ▪ **Actions:**
  - ▪ Ability to Edit
  - ▪ Ability to Delete

- ▪ **Add Vehicle:**
  - ▪ Input Required Information
  - ▪ Upload Required Documentation
  - ▪ "Save" your changes

➢ **Three-step process**

▪ **Step 1: Complete your Pass**

▪ Step 2: Community Orientation

▪ Step 3: Secure Checkout

➢ **Step 1: Complete Your Pass**

▪ Add the "Driver" or employee name

▪ **Must** select the Driver or Employee from the Company Profile – Employees

▪ Add Employee will allow a User to add an employee to the company profile

▪ "Badge w/ Driver License" **limited** to employees with a driver license

- **All Contractor Employees must check-in prior to entering the Ocean Lakes Family Campground**

- **Annual Badges are available for $30**

- **Purchase a Pass**

  - Employee Badge w/ Driver License

  - Employee Badge w/ No Driver License
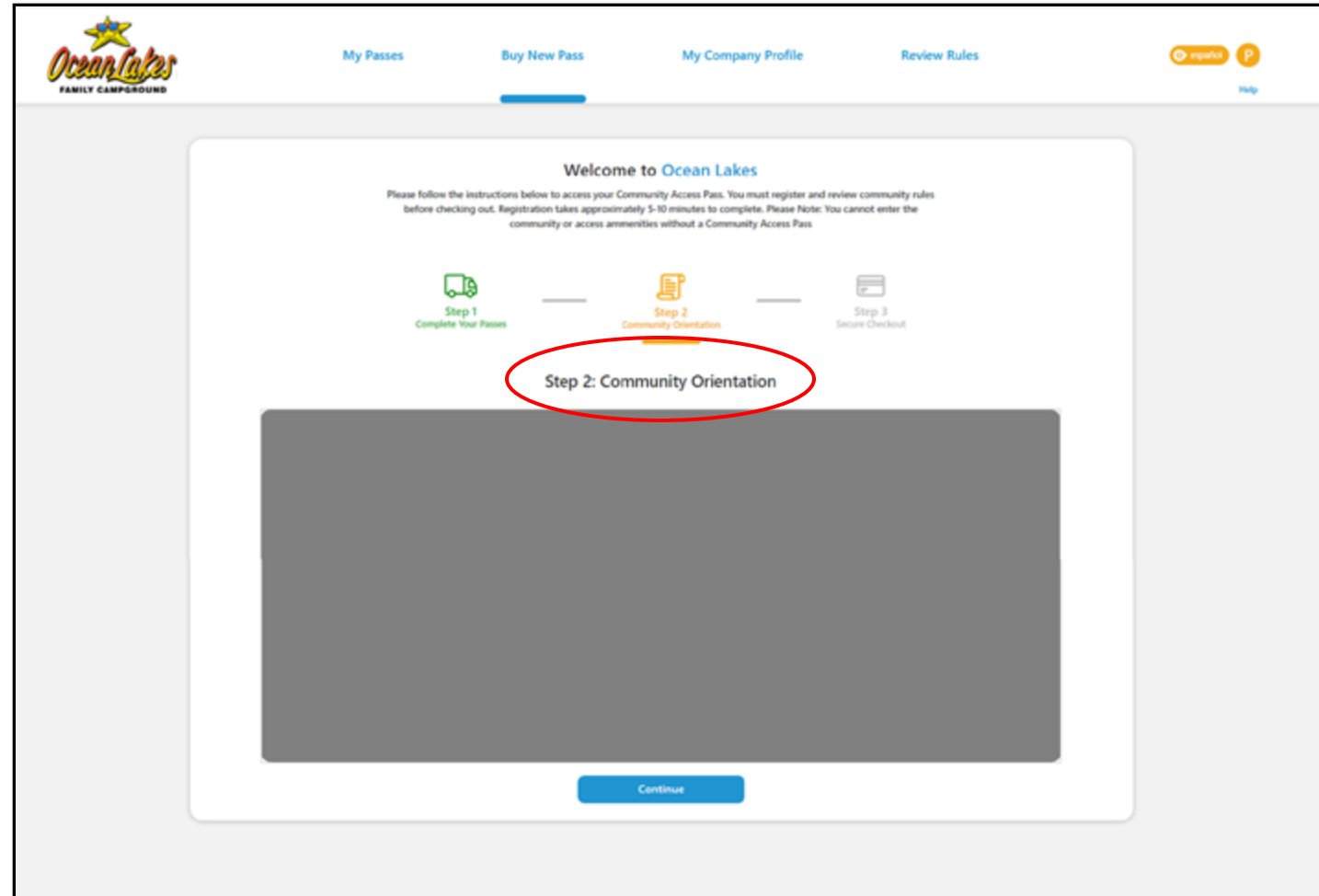
  - Employee Badge w/ Drone License

➢ **Three-step process**

- Step 1: Complete your Pass

- **Step 2: Community Orientation**

- Step 3: Secure Checkout

➢ **Step 2: Community Orientation**

- All Employees are required to watch the Community Orientation prior to entering the community

➢ **Three-step process**

▪ Step 1: Complete your Pass

▪ Step 2: Community Orientation

▪ **Step 3: Secure Checkout**

➢ **Step 3: Secure Checkout**

▪ Review Information

▪ Select Method of Payment (Credit Card)

▪ Select "Confirm Purchase"

➢ **Stripe Payment Processor**

▪ Can save CC information

➢ **Thank you**

- Print your receipt

- Down the Pass (QR code)

- Select "Complete"

- Provides notification to Admin

- Sends Receipt to Company (Email / SMS)

Lesson 5: My Passes

➤ **My Passes**

- Search your records

- See all of your passes (badges)

- "Actions" (manage your passes)

- "Export" your records

Lesson 6: Community Rules

➢ **Review the Rules**

　➢ Main navigation bar

　➢ Access to Community Orientation, so employees have easy access
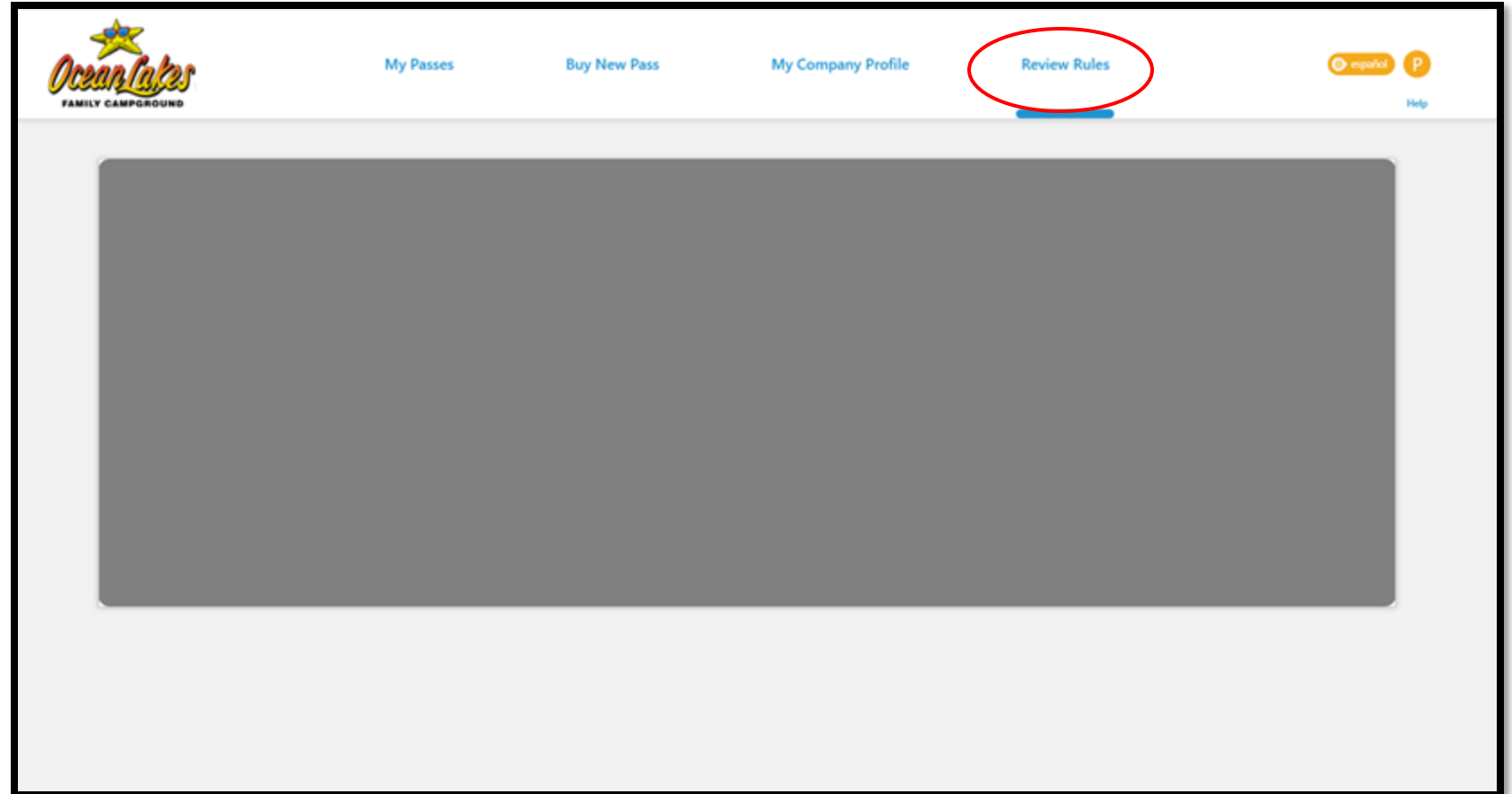
Support Options

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