





Vendor Training

Participants

- Cedric White Ocean Lakes Campground
- Tracy Wright Ocean Lakes Campground
- Kim Lynch Ocean Lakes Campground
- Taylor James SymLiv
- Pete Lee SymLiv

Today's Agenda

- 1. Introductions
- 2. Meet the Team
 - a. Ocean Lakes
 - b. SymLiv
- 3. Vendor Training
 - 1. Overview
 - 2. Lessons
- 4. Customer Support
- 5. Questions



Implementation

Two Phased Implementation: Note... Everyone with access currently, will maintain access.

> Phase 1: Establish Contractor Accounts

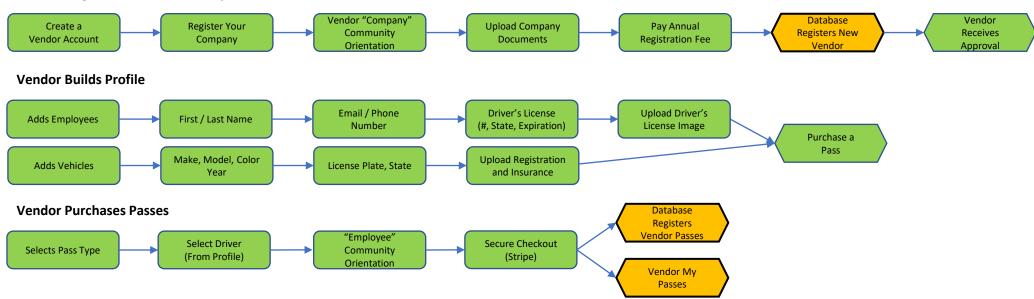
- Starts on January 8, 2023
- Contractors will have access to the Portal
- Contractors have 30 days to access their accounts and complete the annual registration process
 - Verifying / updating the company's background information
 - Reviewing a Community Orientation
 - Uploading required documentation
 - Paying the annual registration fee
- During this phase, the Ocean Lakes Compliance Office will review each contractor's record for compliance.

Phase 2: Badge Renewals

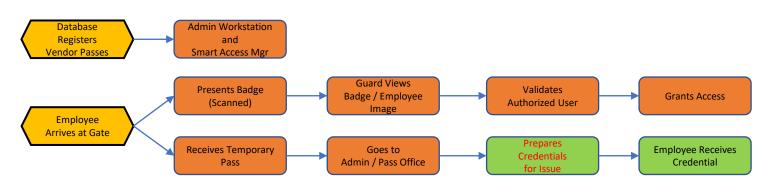
- Starts after each Contractor's account is Approved by the Compliance Office
- Contractors will need to verify their employee information (My Profile)
 - Ensure employees are still working for the company
 - Verify badge numbers by employee
 - Update required Employee information (Driver License / authorized form of Identification)
- Contractors should start this process once their accounts are approved
- Is required to renew any badges

Vendor Process Map

Vendor Registers with Community



Admin Role



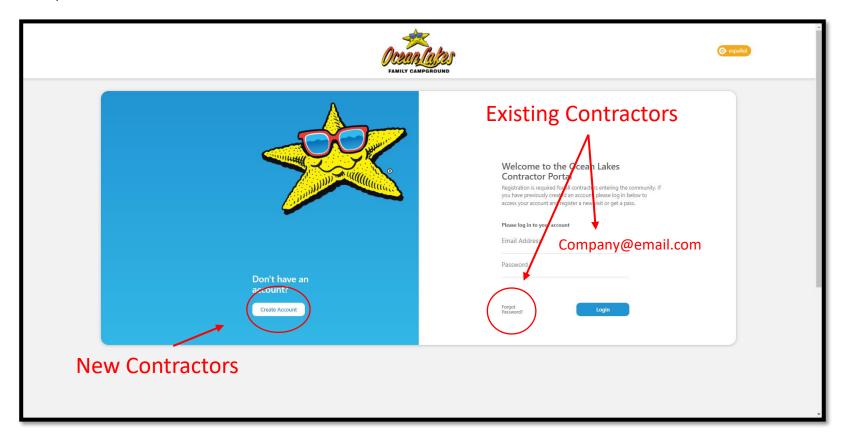
Contractor Access



- ☐ <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



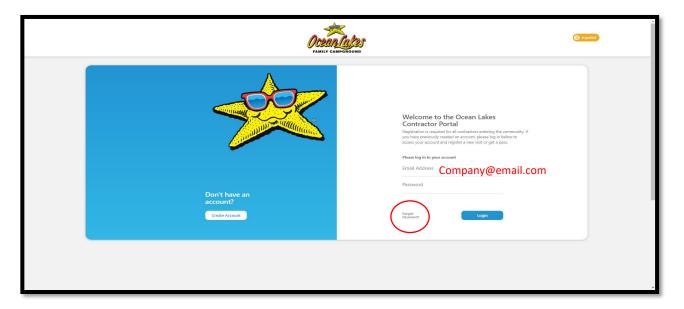
- > Existing Contractors will claim their accounts using the "Forgot Password" feature
 - 1) Input your account email in the "Email Address"
 - 2) Click on "Forgot Password"
- **▶** New Contractors will select Create Account
 - 1) Select "Create Account"

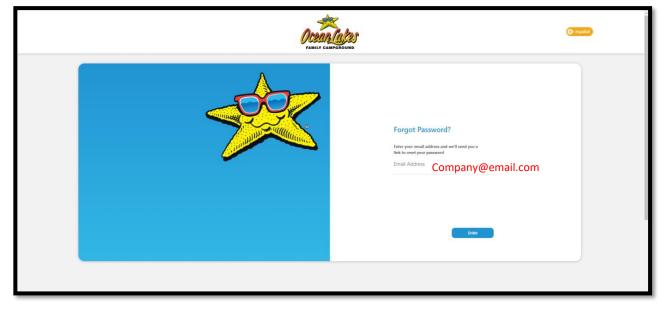




- Existing Contractors will claim their accounts using the "Forgot Password" feature
 - 1) Input your account email in the "Email Address"
 - Click on "Forgot Password"

Input your account email in the "Forgot Password" email field

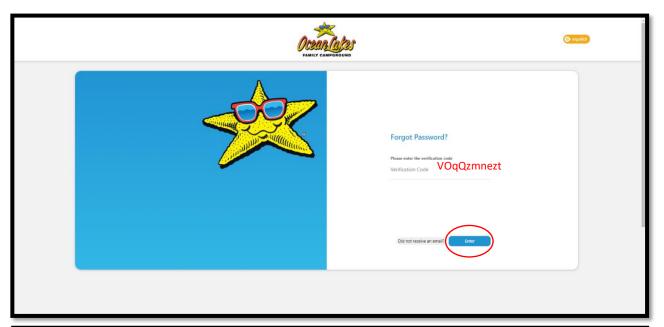


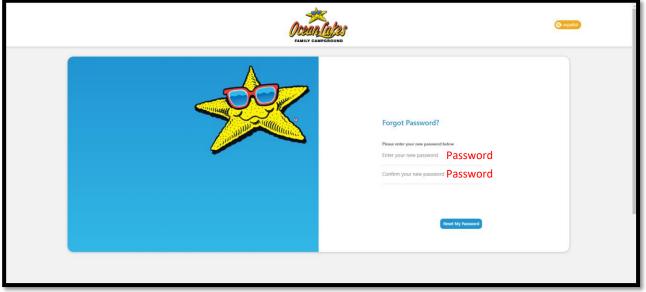




- 4) Check your email for "Reset Password" email [if no email make sure to check your Spam folder]
- 5) From the email, type or copy the code into the "Verification Code" field and select "Enter"

- 6) Next, enter your new password and confirm your password with matching entries.
- 7) Upon completion, you will be redirected to the Log-In page.







New Contractors will "Create an Account"

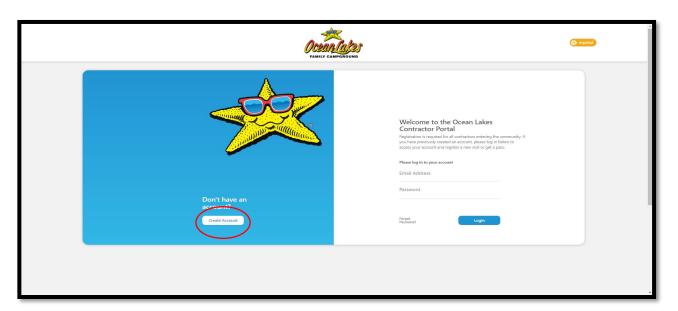
Click on the "Create Account"

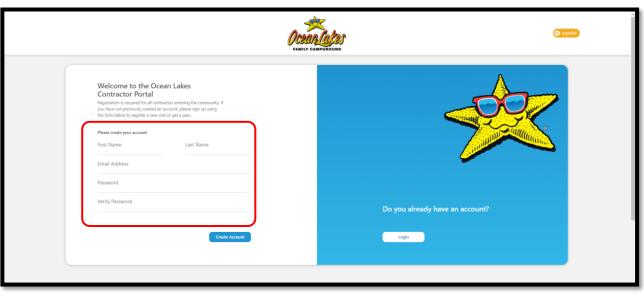
Note: This is a User Account recommended for the individual processing and managing the access badges for a company.



- a. First Name
- b. Last Name
- c. Email Address
- d. Password
- e. Verify Password

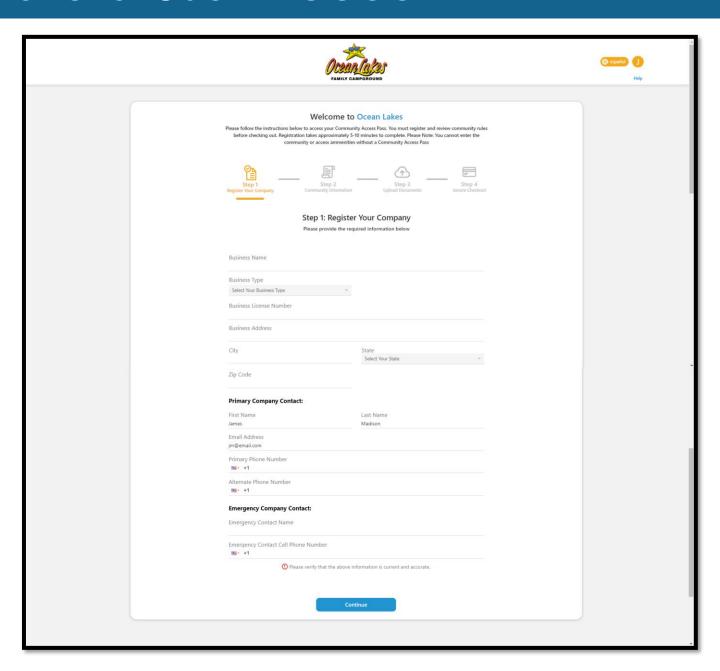
<u>Note</u>: The Email Address is the establishes the account and can not be changed; recommend using a generic email not tied to a specific individual.







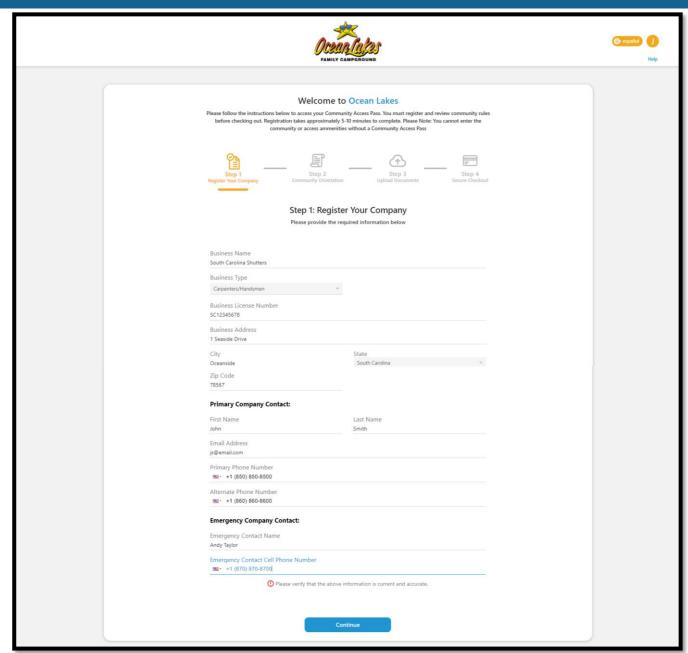
> Next Lesson: Register Your Company





Four-Step Process

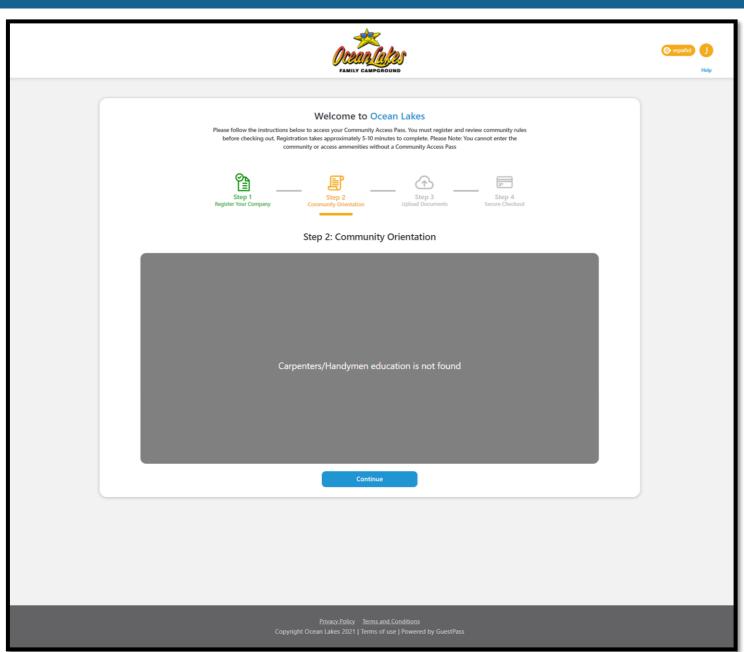
- Step 1: Register Your Company
- Step 2: Community Orientation
- Step 3: Upload Documents
- Step 4: Secure Check Out





Four-Step Process

- Step 1: Register Your Company
- Step 2: Community Orientation
- Step 3: Upload Documents
- Step 4: Secure Check Out





Four-Step Process

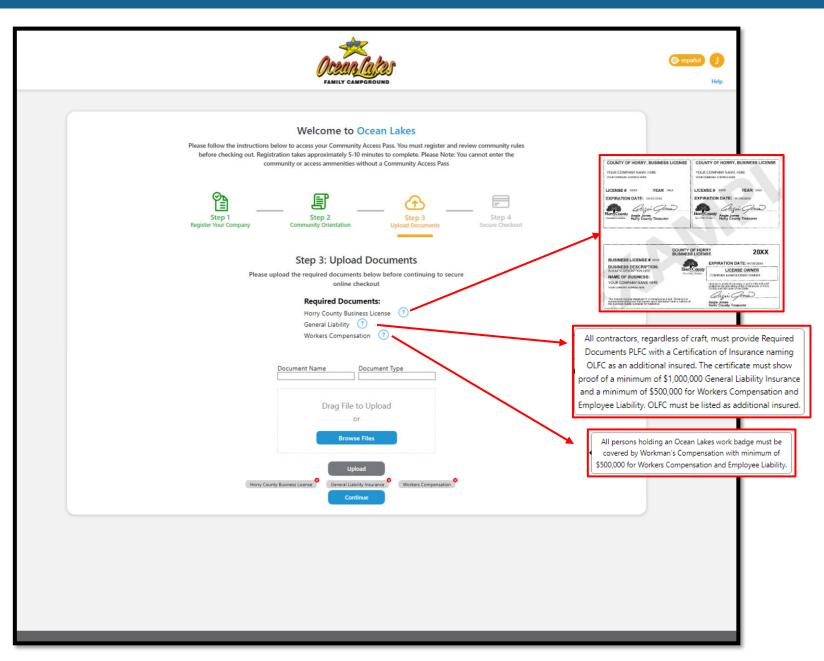
Step 1: Register Your Company

Step 2: Community Orientation

Step 3: Upload Documents

Step 4: Secure Check Out

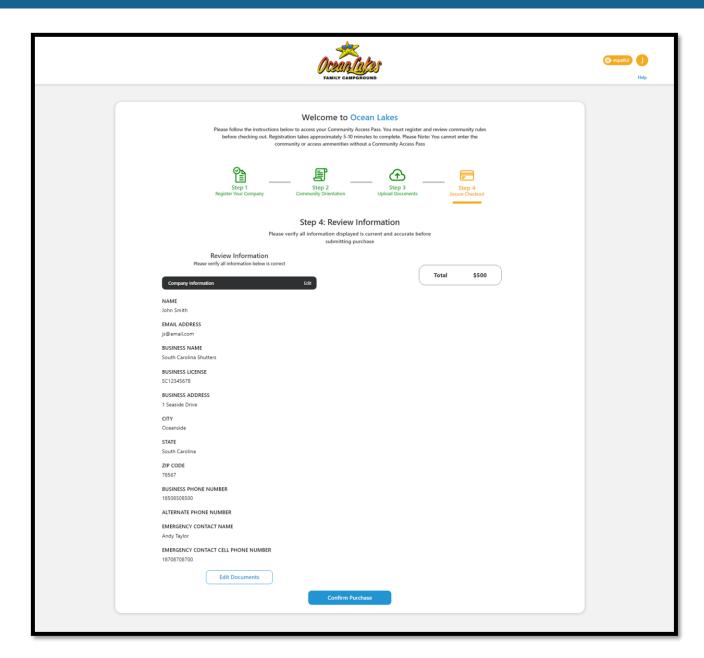
Note: "Pending Review" status





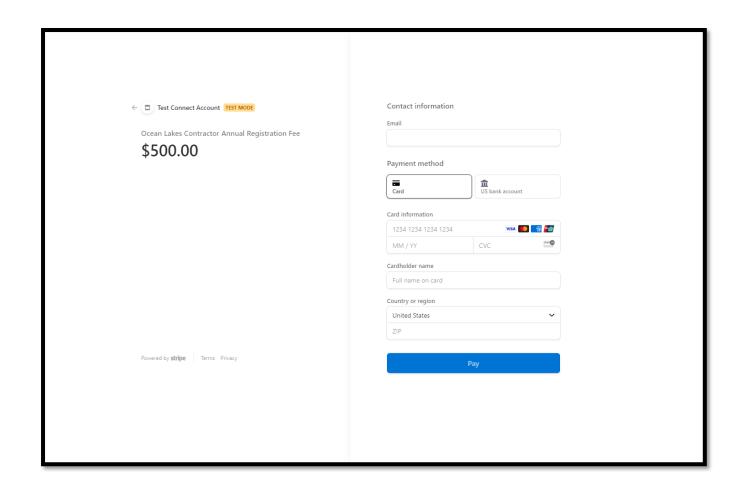
Four-Step Process

- Step 1: Register Your Company
- Step 2: Community Orientation
- Step 3: Upload Documents
- Step 4: Secure Check Out





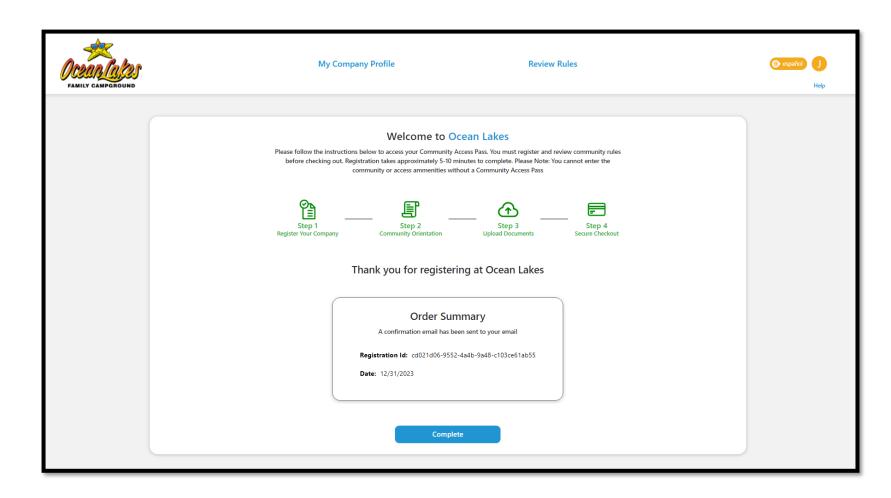
- > Stripe Payment Processor
 - Can save CC information





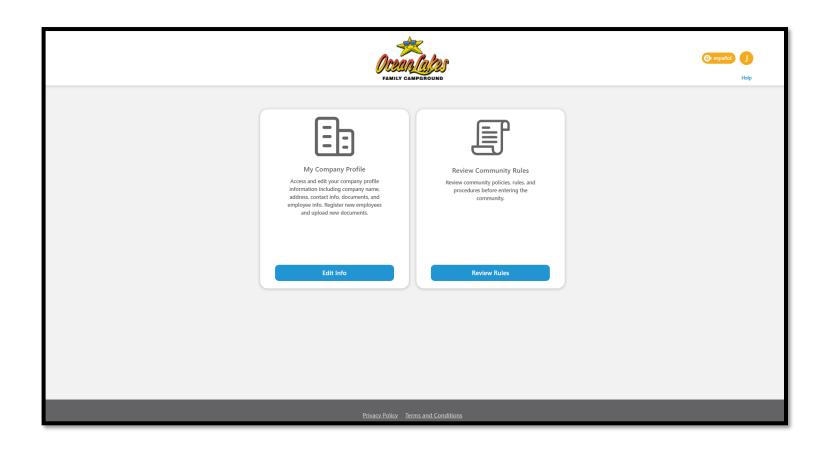
> Thank You for Registering!!

- Contractor Receipt
- Pending Admin Review / Approval





> Next Lesson: My Company Profile



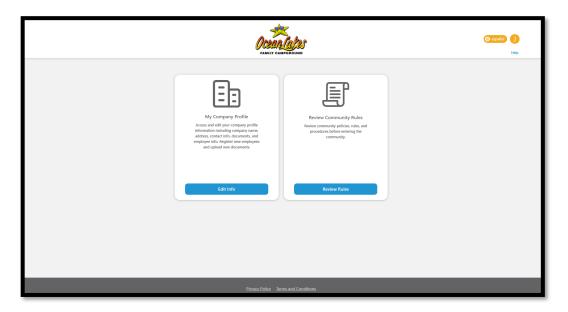


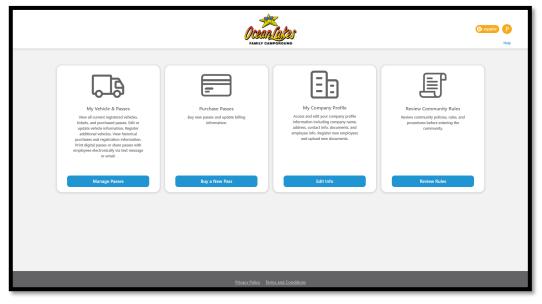
> Account (Unapproved)

- 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

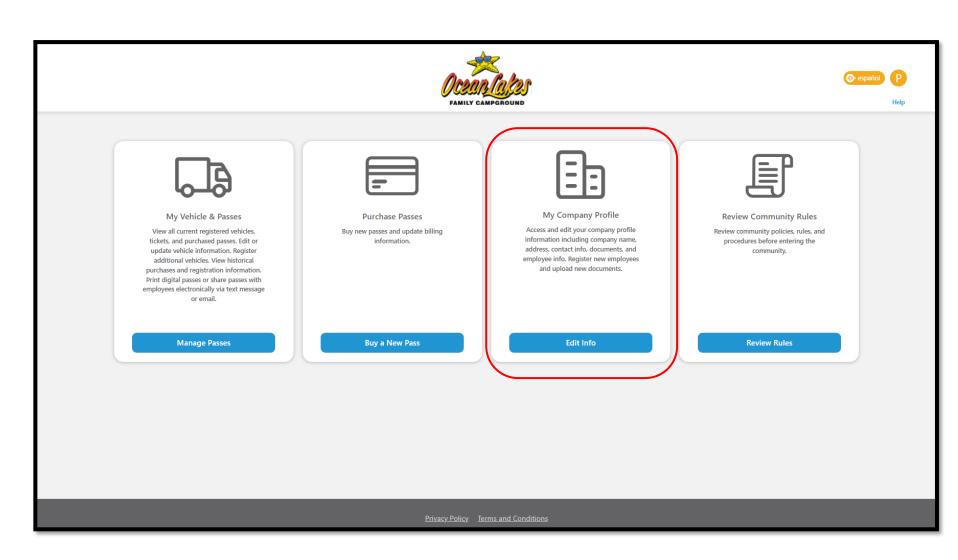






Account (Approved)

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



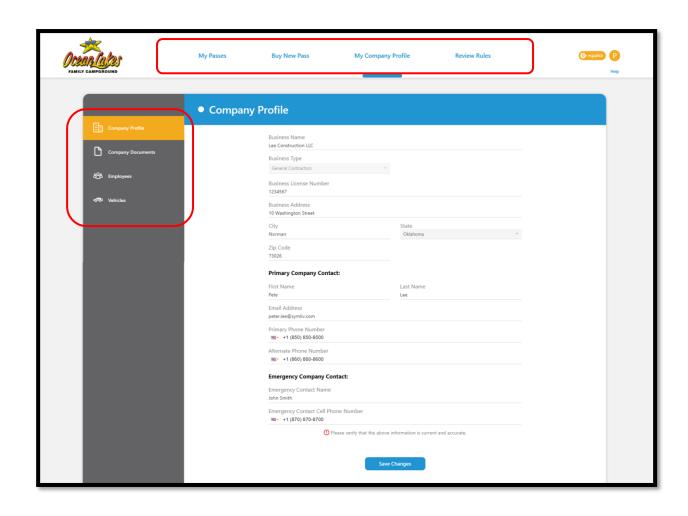


> Company Profile

- Company Profile
- Company Documents
- Employees
- Vehicles

Within Company Profile

- Business Information
- Primary Company Contact
- Emergency Company Contact
- "Save Changes"





> Company Profile

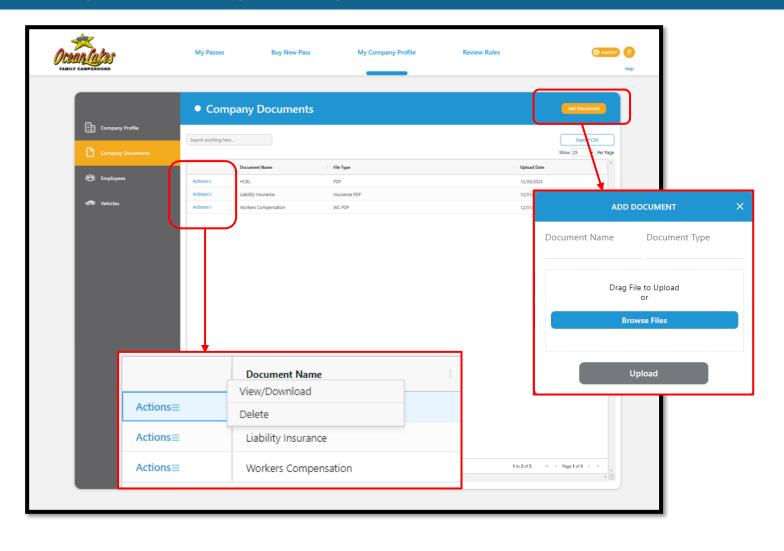
- Company Profile
- Company Documents
- Employees
- Vehicles

Actions:

- Ability to View/Download
- Ability to Delete

Add Document:

- Document Name (text)
- Document Type (dropdown)
- Browse files for upload
- Upload Documents





> Company Profile

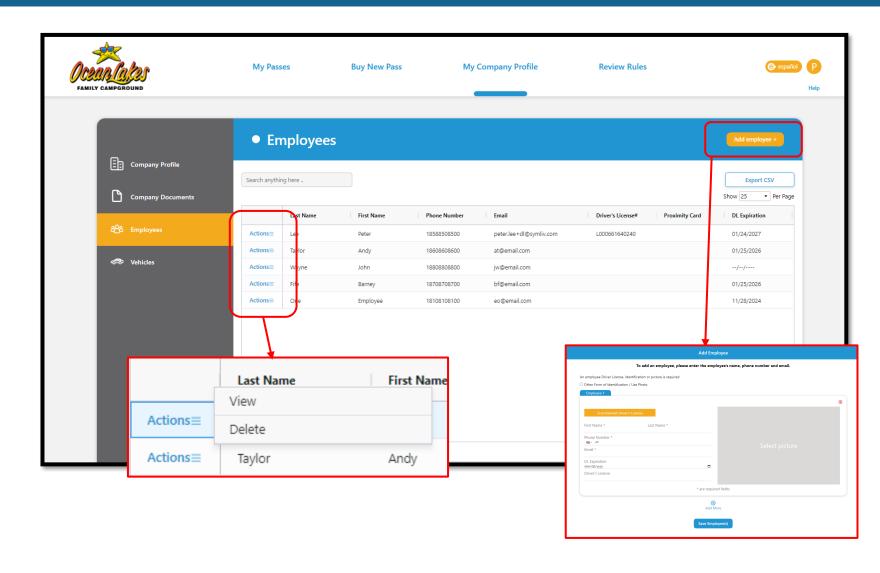
- Company Profile
- Company Documents
- Employees
- Vehicles

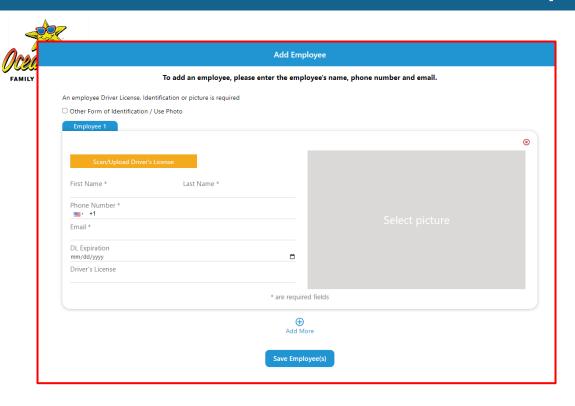
Actions:

- Ability to View
- Ability to Delete

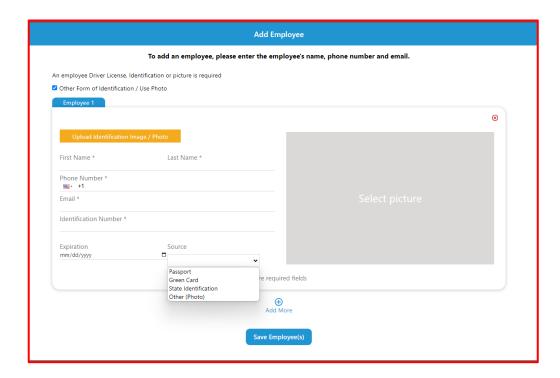
Add Employee:

Next slide....





- > 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

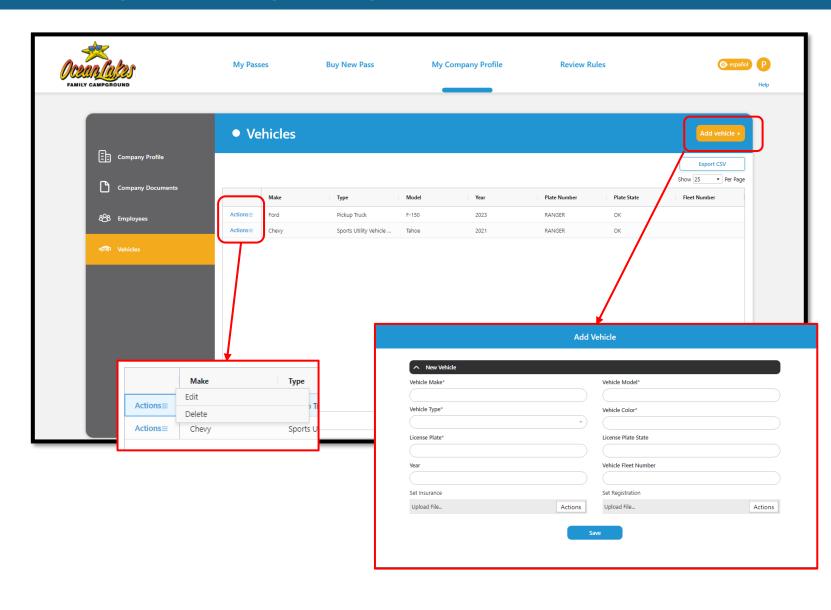
- Company Profile
- Company Documents
- Employees
- Vehicles

Actions:

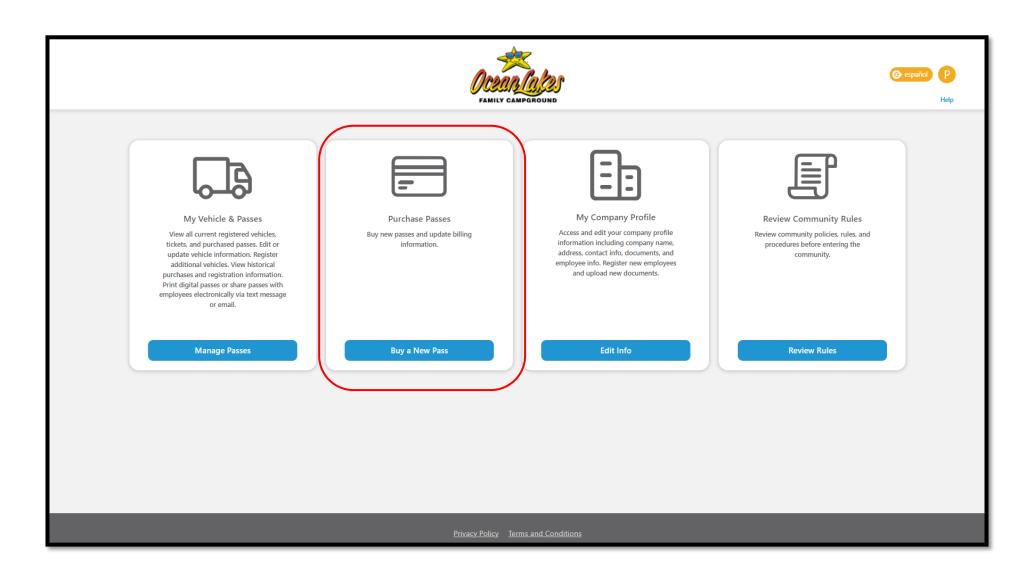
- Ability to Edit
- Ability to Delete

Add Vehicle:

- Input Required Information
- Upload Required Documentation
- "Save" your changes

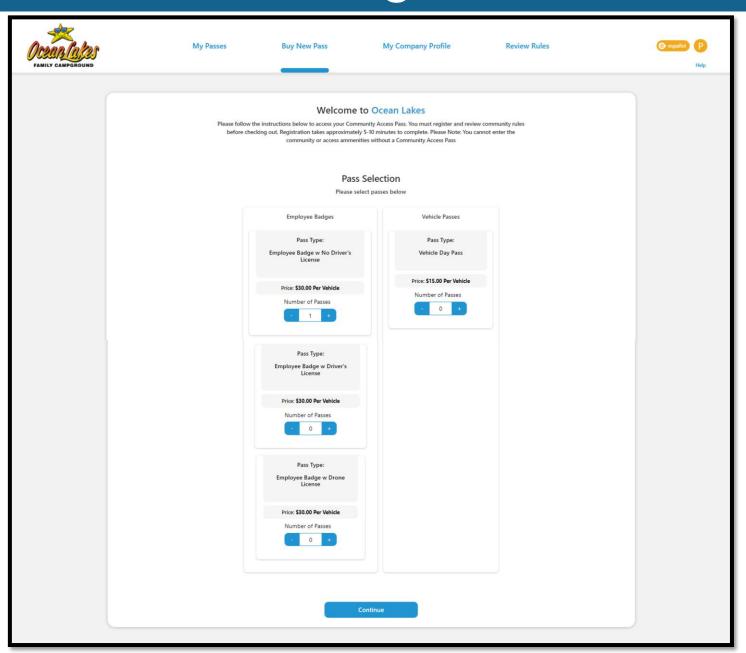








- ➤ All Contractor Employees must check-in prior to entering the Ocean Lakes Family Campground
- > Annual Badges are available for \$30
- Purchase a Pass
 - Employee Badge w/ Driver License
 - Employee Badge w/ No Driver License
 - Employee Badge w/ Drone License



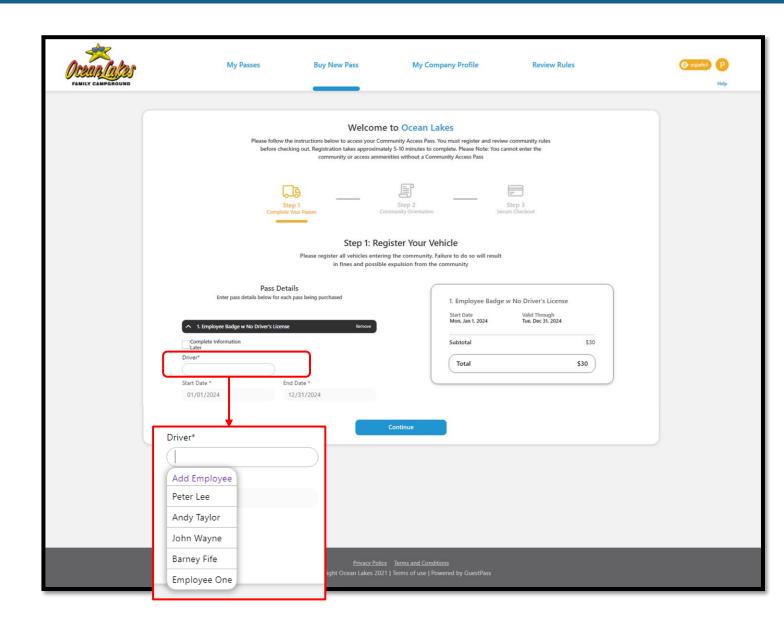


> Three-step process

- Step 1: Complete your Pass
- Step 2: Community Orientation
- Step 3: Secure Checkout

> Step 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





> Three-step process

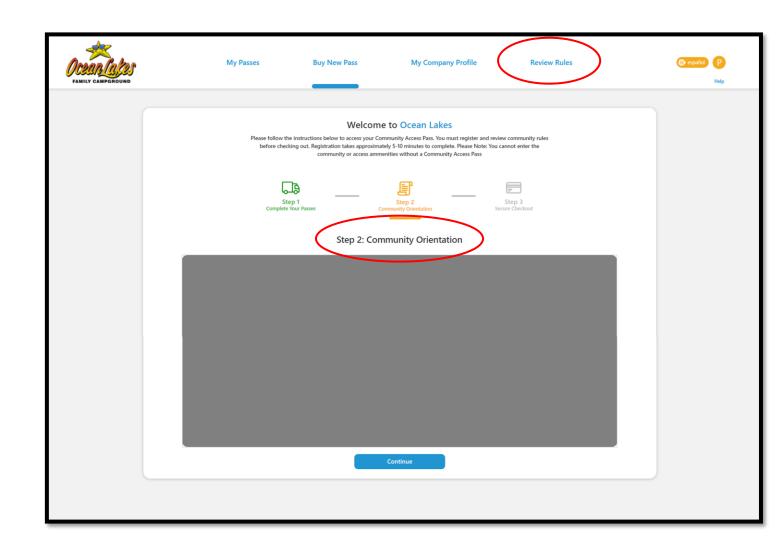
Step 1: Complete your Pass

Step 2: Community Orientation

Step 3: Secure Checkout

> Step 2: Community Orientation

 All Employees are <u>required</u> to watch the Community Orientation prior to entering the community



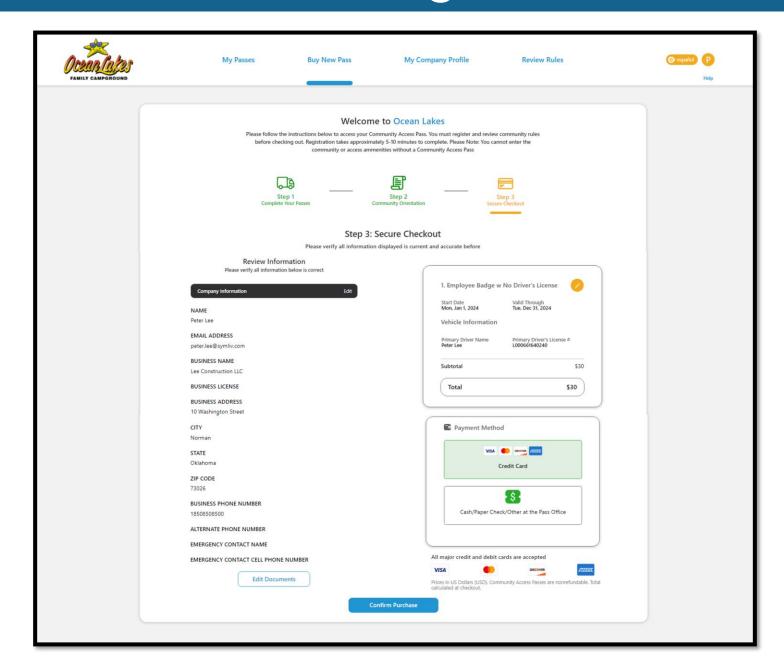


> Three-step process

- Step 1: Complete your Pass
- Step 2: Community Orientation
- Step 3: Secure Checkout

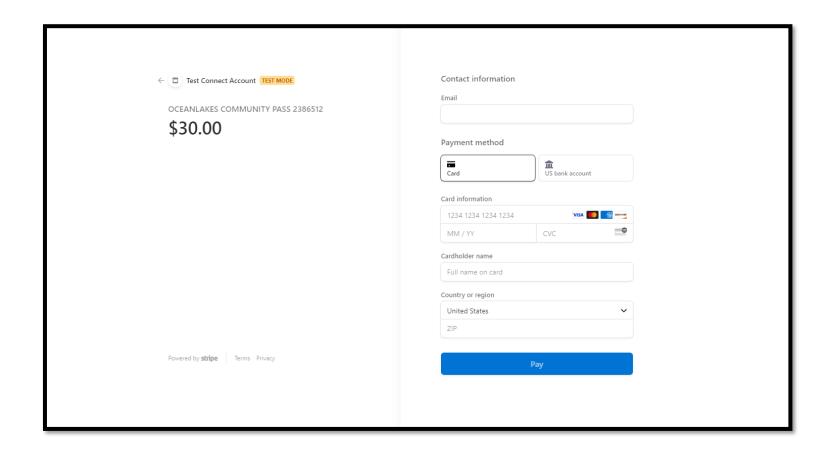
> Step 3: Secure Checkout

- Review Information
- Select Method of Payment (Credit Card)
- Select "Confirm Purchase"





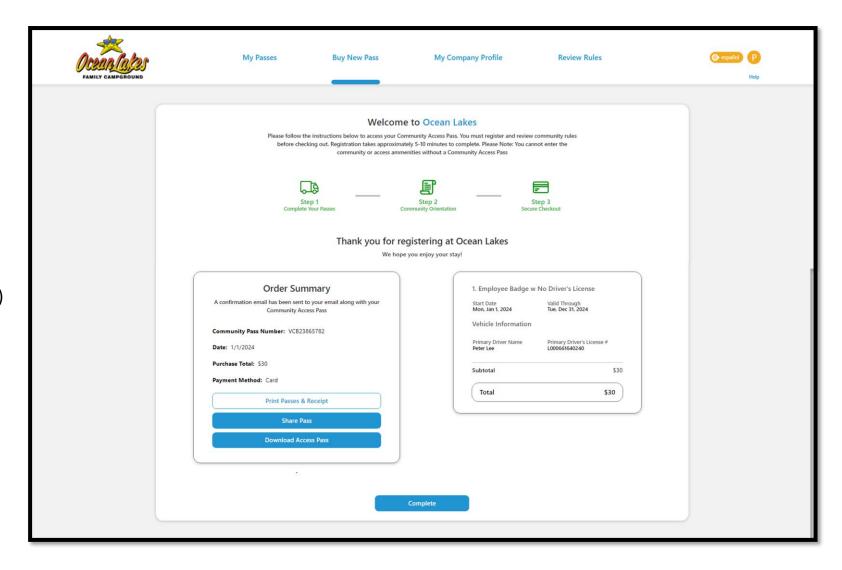
- > Stripe Payment Processor
 - Can save CC information





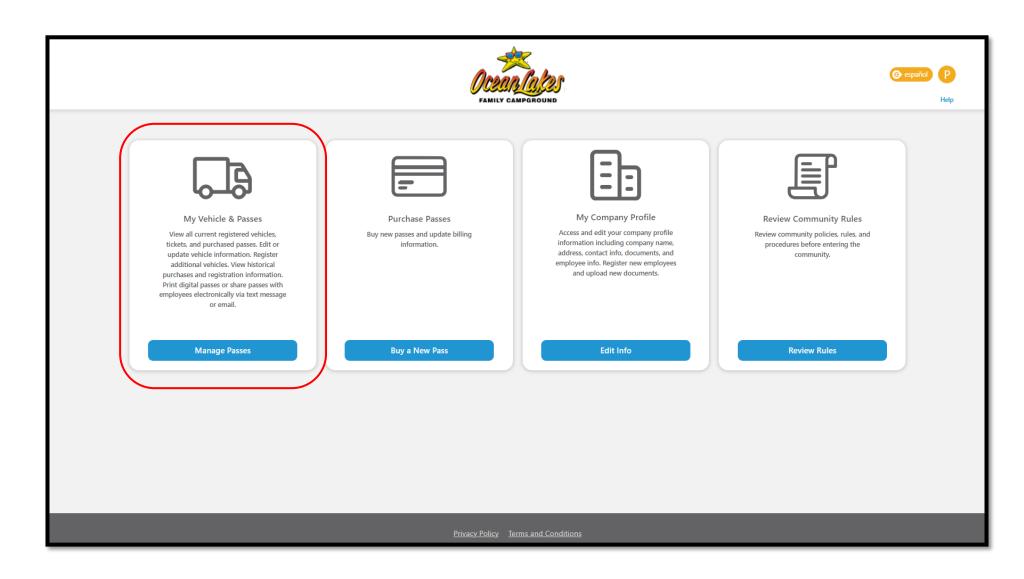
> Thank you

- Print your receipt
- Down the Pass (QR code)
- Select "Complete"
- Provides notification to Admin
- Sends Receipt to Company (Email / SMS)



Lesson 5: My Vehicles and Passes



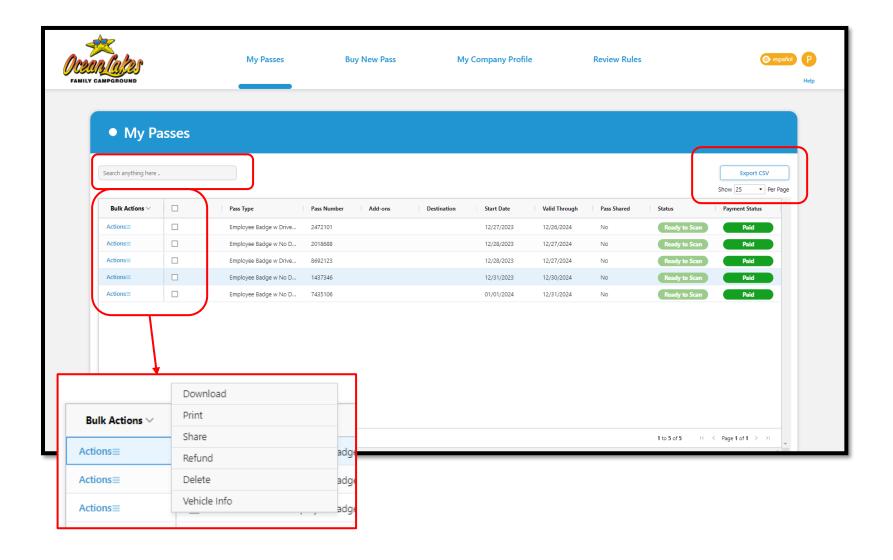


Lesson 5: My Passes



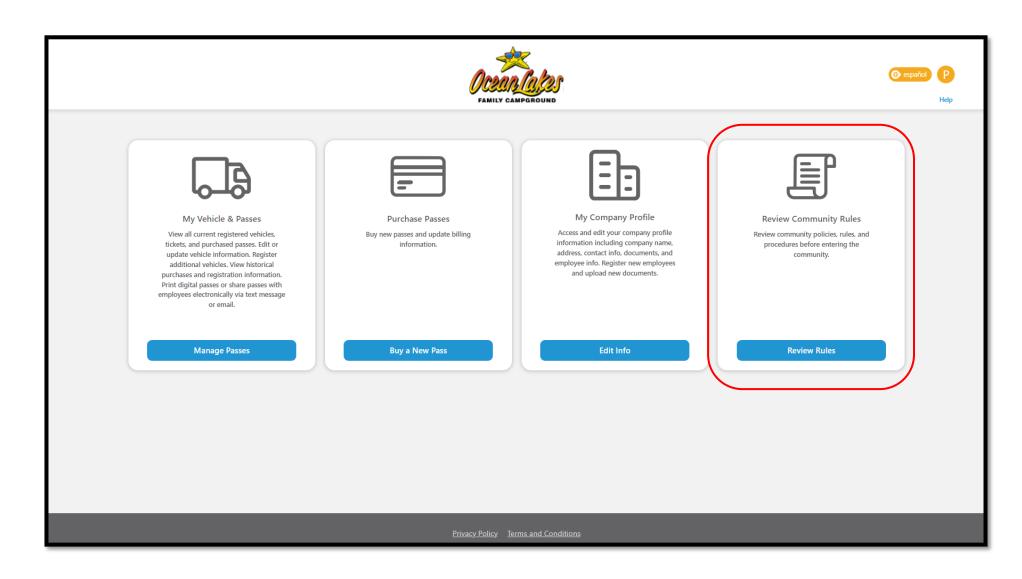
My Passes

- Search your records
- See all of your passes (badges)
- "Actions" (manage your passes)
- "Export" your records



Lesson 6: Review Community Rules



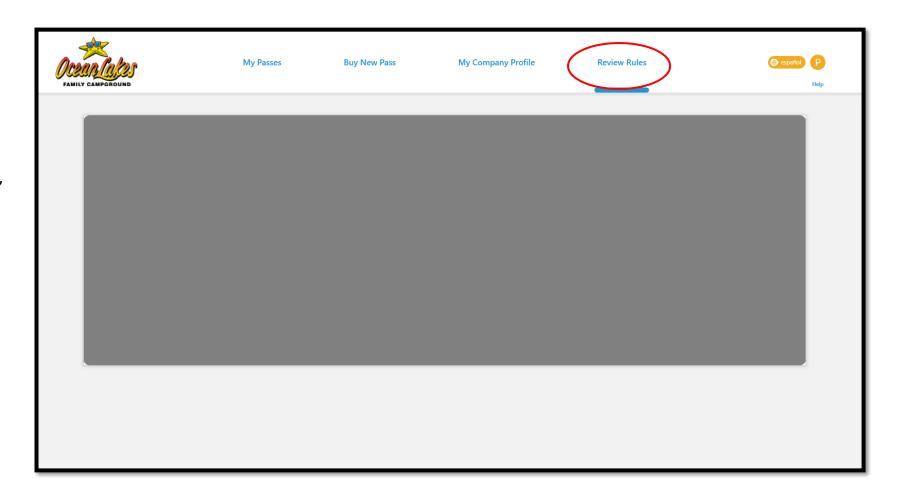


Lesson 6: Community Rules



Review the Rules

- ➤ Main navigation bar
- Access to Community Orientation, so employees have easy access



Support Options

Convenient and Easy to Use





GIVE US A CALL

Telephone our Customer Support Team at (435) 612-2668, option 2. Lines open 9 am – 9:30 pm (EST).



EMAIL US

Support@Symliv.com



ONLINE KNOWLEDGE BASE

Visit <u>support.Symliv.com</u> for

- How-To articles
- Videos
- Frequently Asked Questions



Thank You!





