

1. Open <https://business.servicelive.com> in Mozilla Firefox or Google Chrome, and click **Account Login**.

**Note:** ServiceLive is optimized for these browsers. Do not use Internet Explorer.

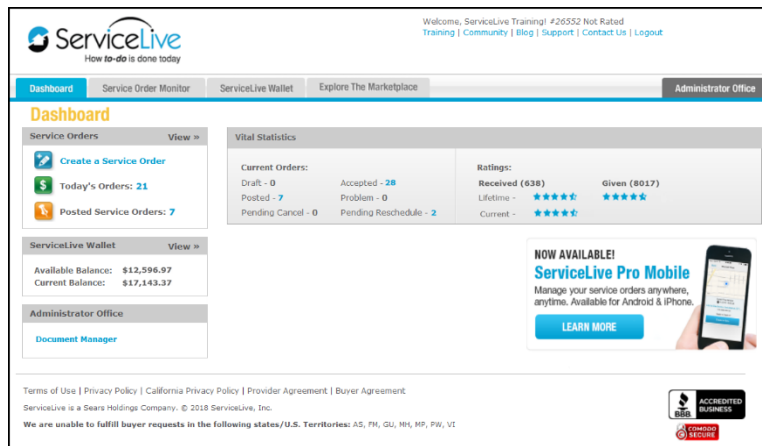


2. Enter your **user name** and password into the **Username** and **Password** fields, and then click **Login To ServiceLive**.

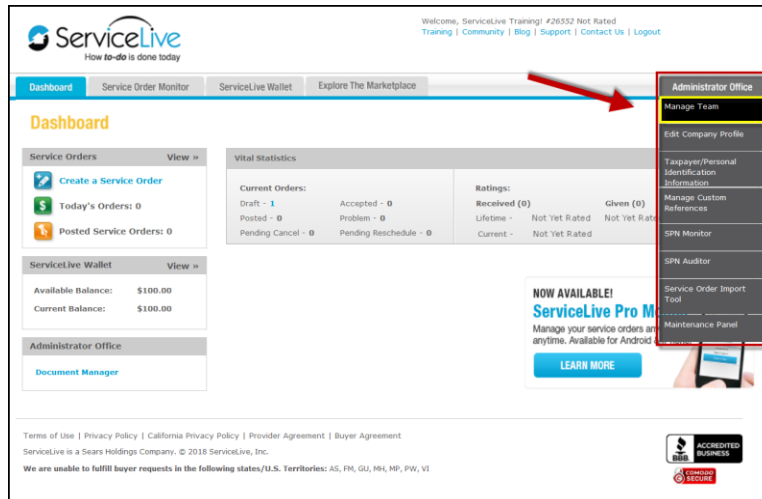
**Important:** Passwords are case sensitive.

3. You will be logged into your Buyer account and your account Dashboard will display.

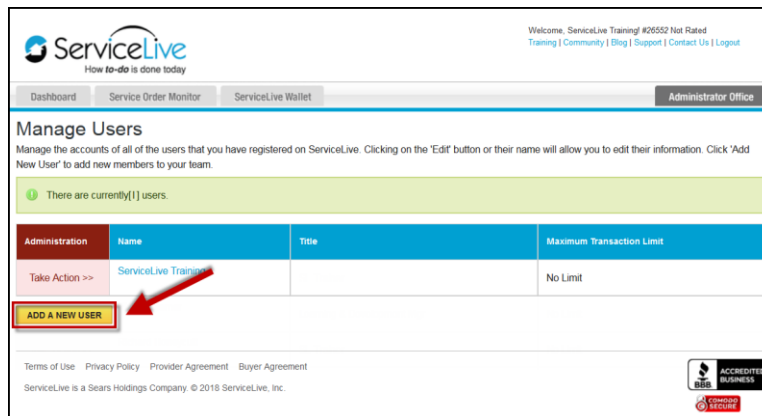
**Note:** The information that displays on your Dashboard view is dependent on the permissions that were assigned to you when you were added to the account as a user.



4. Hover your mouse over the **Administrator Office** tab, and then click **Manage Team**.

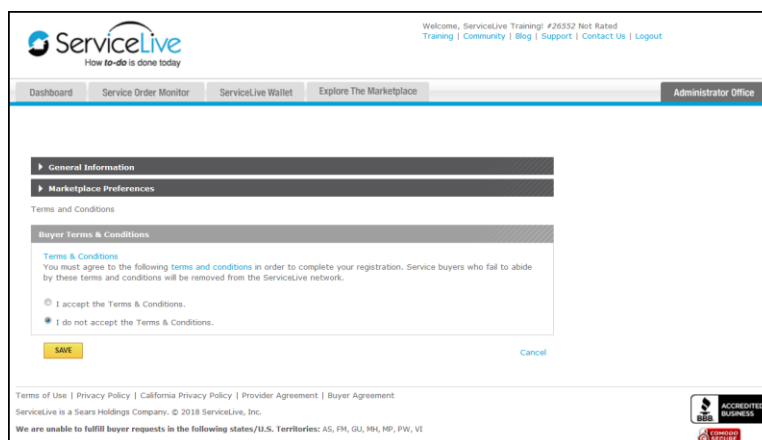


5. The Manage Users page will display – click **ADD A NEW USER**.



6. The page will display *General Information*, *Marketplace Preferences*, and *Buyer Terms & Conditions* sections.

**Note:** The *General Information* and *Marketplace Preferences* sections were collapsed for demonstration purposes.



- Complete the **General Information** section fields with employee details (name, job title and role, and user name).

**General Information**

**Personal Information**

First Name  Middle Name  Optional

Last Name  Suffix (Jr., II, etc.)  Optional

**Job Title & Role**

What is the person's job title and role within your company? More than one role may be assigned to each person you register.

Role within Company (Check all that apply)

☐ Owner/Principle

☐ Administrator

☐ Associate

Job Title  Optional

**User Name**

Please create a user name login for this buyer. Enter the email address associated with this user profile. Forgot Username and Forgot Password features and all correspondence regarding this user profile will use this email address.

User Name

User Name Confirmation

- Complete the **ServiceLive Activities & Permissions** section fields – check off each tool that the new user will have access too.
  - The *Manage Buyers* and *Manage Buyer Company Profile* permissions are for the account Administrator only.
  - The *Finance Manager* permission is for the account Administrator only, unless your company has a finance person or team that can help with keeping the *Wallet* funded.
  - The *Manage Buyer Service Orders* permissions are for everyone, except (maybe) the Finance person or team.
  - The *Maintenance Panels & Tools* permissions are more advanced permissions that should be discussed with our Business Development Team.
  - The *Manage Select Provider Network* permissions will only display if your company has created a Select Provider Network (SPN) – team members who will oversee the Providers in your network and manage their SPN membership will need these boxes checked off.

**Note:** SPN's are an advanced Buyer tool – speak to our Business Development Team to see if this tool is right for your company.

**Marketplace Preferences**

**ServiceLive Activities & Permissions**

Please select the activities this buyer will be allowed to perform on ServiceLive

**Manage Buyers**

☐ Manage ServiceLive Buyer Resources

**Manage Buyer Company Profile**

☐ Manage Business Profile

☐ Manage User Profile

**Admin Only Actions-Enterprise Buyer**

☐ Finance Manager

**Manage Buyer Service Orders**

☐ Create Service Order

☐ Manage Buyer Documents

☐ Manage Service Orders

☐ View Customer Payment

☐ View Provider Documents

**Maintenance Panels & Tools**

☐ Force Activate Conditional Auto Routing Rules

☐ Buyer Order Template Maintenance

☐ Manage Reason Codes

☐ SKU Maintenance

**Buyer File Upload**

☐ Buyer File Upload Tool

**Manage Select Provider Network**

☐ Network Monitor

☐ SPN Auditor

☐ View Member Manager

☐ Edit Member Manager

☐ Buyer SPN ViewDoc Permission

- Complete the **Service Order Communications Preferences** section fields – enter a business **phone number** (required), and the user's **primary email address** (required); all other information is optional.

**Important:** If your company decides to display an alternate Buyer contact on a Service Order for the Provider to see, every user on your team will be visible in the alternate contact information drop-down while creating an order. When a user is selected as an alternate Buyer contact – the information entered here will display on the order.

- Complete the **Maximum Transaction Limit** section fields – enter the maximum spending limit the user will be allowed to post an order for. For example, if the user is not allowed to post a Service Order for more than \$50, then enter **50**.

**Important:** This functionality applies best if your company has many agents handling Service Orders and you decide to designate some agents to create or increase payment, and some agents that only review orders.

- Read and accept the **Terms & Conditions**, and then click **SAVE**.

**Note:** Clicking **SAVE** without accepting the Terms & Conditions will display the following error prompt, and the *I accept the Terms & Conditions* button will be highlighted. The account cannot be created until the Terms & Conditions are accepted.