Manage Team - Provider

This lesson explains how to Reset Password for Provider Firm and Service Pro(s), Add a New User and how to Edit Service Pro Profiles: General Information, Marketplace Preferences, Skills & Services, Licenses & Certifications, Background Check, and Terms & Conditions tabs.

- 1. To Reset Password:
 - a. Hover over Administrator Office tab.
 - b. Click on Manage Team link.

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Dashboard	Service Order Monitor	ServiceLive Wal	et Orde	r Management			Administrator Office
Dashboa	ard				b	uesday, October 8. Available Wallet	Manage Team Edit Company Profile
Performance	e & Profile Statistics	Service (rder Statis	tics			View Company Profile
	ings (124) ★★‡ Lifetime Rating	109 - Te 116 - Re	day ceived	77 - Accepted 0 - Bid Requests	12 - Pending Cancel	Total Value Rece	ived: \$13,058.04*
ServiceLive	Status Monitor	56 - Pro	blem	<mark>5</mark> - Bulletin Board		*E×c	udes Bid Requests

- c. Scroll down to Service Pro Profile you would like to edit.
- d. Hover over Take Action >> link.
- e. Click on Reset password link.

Dashboard	Service Order Monitor	ServiceLive	Wallet Ord	ler Management			Administrator Office
	1						
Manage (Jsers						
Manage the accou that person's profil	nts of all of the dispatch le, where you can review	ers, administrators and edit their publi	and providers t c and private in	hat you have registered (formation. Click 'add nev	on ServiceLive. Clickin v user' to add new me	g on a team memb mbers to your team	er's name will take you to
O There are c	urrently[14] users.						
Administration	Name		Market Status	Member Status	Background Check	Phone Number	Title
Take Action >>	No d	Du AlLou Jser Id# 19459)	Active	Approved (market ready)	Clear	1234567891	Installer / Manager
Take Action >> Edit Profile	No W Photo (U	/ayne BoW/ayne Jser Id# 24091)	InActive	Declined	Clear	1234567891	Carpenter Handyman
Reset Password	е —е		1				1

f. Popup box will display, click on **CONTINUE** button.

Note: This will send you a ServiceLive Password Reset e-mail.



ServiceLive

g. Click on Reset My Password link in ServiceLive Password Reset e-mail you receive.



- 2. Create your (new) password screen will display:
 - a. Type and confirm a password following the specifications listed.
 - b. Password strength will be identified in bar. If your password is not strong, consider revising.
 - c. Click on drop down list to display Security Questions.
 - d. Navigate to preferred Security Question, click to select.
 - e. Type the answer in the box to Security Question you selected.
 - f. Click on LOG W button.
 - g. This will reset your password and login you into ServiceLive.



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3. To Edit Service Pro Profile:

- a. Hover over Administrator Office tab.
- b. Click on Manage Team link.

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Dashboard	Service Order Monitor	Ser	viceLive Wallet	Order	Management		Administrator Office
Dashbo	ard					l	Manage Team Tuesday, October 8. Available Wallet
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	tings (124) ★★★☆ Lifetime Rating		109 - Today 116 - Recei	/ ved	77 - Accepted 0 - Bid Requests	12 - Pending Cancel	Total Value Received: \$13,058.04*
ServiceLive	e Status Monitor		56 - Probler	m	<mark>5</mark> - Bulletin Board		*Excludes Bid Requests

- c. Scroll down to Service Pro Profile you would like to edit.
- d. Hover over Take Action >> link.

e

e. Click on Edit Profile link.

Dashboard	Service Order Moni	tor ServiceLive	Wallet Ord	er Management			Administrator Office
Manage Users lanage the accounts of all of the dispatchers, administrators and providers that you have registered on ServiceLive. Clicking on a team member's name will take you to nat person's profile, where you can review and edit their public and private information. Click 'add new user' to add new members to your team.							
O There are cur	rrently[14] users.						
Administration	Name		Market Status	Member Status	Background Check	Phone Number	Title
Administration	Name No pageo	<mark>Lou AlLou</mark> (User Id# 19459)	Market Status Active	Member Status Approved (market ready)	Background Check Clear	Phone Number 1234567891	Title

f. The Service Pro Profile will display and you can select appropriate tab(s) to edit.

Note: Refer to lessons in Service Pro (Provider) Profile course for details.

Dashboard	Service Order Monitor	ServiceLive Wallet	Order Manageme	ent (New)			Administrator Office
Manage	Users Edit Use	ər					
ivia lage							
General Information	Marketplace Preferences	Skills & 🎽 🎽	Licenses & Certifications 🎦	Background Check	Terms & Conditions	M	

- 4. Add a New User:
 - a. Hover over Administrator Office tab.
 - b. Click on Manage Team link.

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Dashboard	Service Order Monitor	ServiceLive Wallet	Order Management		Administrator Office
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ServiceLive	e Status Monitor	56 - Problem	5 - Bulletin Board		*Excludes Bid Requests

c. Scroll to bottom of page and click on **ADD A NEW USER** button.

Take Action >>	Cer qwe	qweqw	\$50.00
ADD A NEW USER			

d. Refer to lessons in Service Pro (Provider) Profile course for information on how to fill out each tab.

Dashboard	Service Order Monitor	ServiceLive Wallet	Order Manageme	New	
Manage	Users Add N	ew User			
General Information	A Skills & A Services	Licenses & Certifications 🛆	Background Check	Terms & 💧	
(User Id#)					
ServiceLive sim less administra	plifies project manageme tive work for you and you	ent by letting your servic ur staff and more time ir	e providers accept and the field for your se	nd manage their ow ervice pro,	n orders. That means
Role in the Ma	rketplace				
Will this pers	son perform service on o	rders from the marketpl	ace?		
⊙Yes ONo					
In order for Service Pro i register a Se	your company to particip n your company who will rrvice Pro Now.	ate in the marketplace, be performing work in cu	you must have 'Serv ustomer's homes. Ple	ice Pro Profiles' com ease select 'Yes' if y	plete for each ou would like to

ServiceLive