# Resource Center General Help

**Questions?** We have answers. If you can't find a solution here or the FAQ page, you can send us an email through the Contact Us link.

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## Welcome to the Resource Center

Welcome to the Resource Center. The Resource Center is your source for exclusive business best practices assets. The Resource Center is where you will create an account, sign in and manage your account and team.

Here is an overview of the Resource Center activities.

- 1. Sign In.
- 2. Create an account.
- 3. Register your company.
- 4. Update your company information.
- 5. Invite members.
- 6. Manage members.
- 7. Log out.
- 8. Retrieve a lost password.

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#### **Related Topics**

**Navigating the Resource Center** 

### Navigating the Resource Center

Use the links in the gray bar near the top of the screen to navigate through the Resource Center.

Help Center link: From here, you can access general help and the Frequently Asked Questions.

**Contact Us link**: You can use this link to contact support or give site feedback. You can also access the Getting Started document.

**Buy SLIQ link:** Use this link to purchase a subscription to SLIQ. Once you have <u>purchased a subscription</u> (and <u>signed in</u>), the link changes to SLIQ. Use it to access SLIQ.

**Create Account link:** Use this link to <u>create an account</u> in the Resource Center.

**Sign In link:** Use this link to sign in to your account.

**Welcome, (user name) link**: Once you have signed in this menu provides links to other Resource center activities.

<sup>\*</sup>Note: For instructions on using SLIQ©, refer to the SLIQ© Getting Started Guide.

## **Accessing Your Profile**

You will need to access your profile in order to make changes to it.

To open the Profile page, select **My Account** from the *Resource Center Home* page **Welcome** drop down list.

To change your profile, complete the following steps.

1. Select **Edit Profile** next to your user name to edit your profile.

On the *Manage Account* tab, your **Account Settings** are displayed.

- 2. You can change your display name by highlighting the existing text in the **Display Name** field and entering a new name.
- 3. To change your Email address, select **Change Email Address** to open the <u>Change Email Address</u> screen.
- 4. Select Manage Password to expand that section.
- 5. To change your password, complete the following steps.
  - a. Enter your **Current Password**.
  - b. Enter a **New Password**. The password must be at least eight characters long and include at least one non-alphanumeric symbol.
  - c. Retype your **Password** to confirm it.
  - d. Select Change Password.
- 6. Select **Account Information** to expand that section. You can view status details about your account login, activity, and password change dates.
- 7. Select **Update** to save changes to your account. Or to remove your account, select **Unregister**.

On the Manage Profile tab, your Profile Settings and Contact/Location Information are displayed.

- 8. You can change your **First**, **Middle**, or **Last Name**.
- 9. Select **Contact Information** to expand that section.
- 10. Select **Location Information** to expand that section.
- 11. You can enter or change your Street, City, Region, Country, and Postal Code.
- 12. Select **Update** to save changes to your account.

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# Changing Your Email Address

You access the *Change Email Address* screen from the *Manage Profile* screen under **Manage Password**.

To change your email address, complete the following steps.

- 1. Enter the **New Email Address**.
- 2. Select Change Email Address.

#### Creating an Account

You will need an account to use the Resource Center.

To open the *Create Account* screen, select **Create Account** from the *Resource Center Home* screen. The *Create Account* screen also opens from the link inside an email inviting a member to join.

To create an account, complete the following steps.

- 1. Enter your **First Name**.
- 2. Enter your Last Name.
- 3. Enter your Email Address.
- 4. Enter a **password**. The password must be at least eight characters long and include at least one non-alphanumeric symbol.
- 5. Retype your **password** to confirm it.
- 6. Select **Register**.

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### Registering Your Company

Part of your registration is the company to which you belong. The *Register Company* screen opens after you have completed the *Create Account* screen.

To register your company, complete the following steps.

- 1. Enter your **Company Name**.
- 2. Enter your Company Website.
- 3. Check the **Agree to** box to agree to the End User License Agreement. Click on the link to view the End User License Agreement.
- 4. Select **Register**.

If you enter a company website that has already been registered by another person from your company, the *Choose Company* screen opens. If you see this screen, complete the following steps.

- 1. The company should be shown on the left.
- 2. Select Request to Join.

The Company Administrator receives an email with notification to invite you to join the company. Refer to the Inviting a Member section for more information.

If you have been invited to join a company, you will see the *Manage Invitations* screen.

To accept your information, complete the following steps.

- 1. Check the box next to Agree to Terms and Conditions.
- Select Accept.

# Updating Your Company's Information

The Company Information screen includes basic information about your company.

The *Company Information* screen opens after you have completed the *Register Your Company* screen. You can also open the *Company Information* screen by selecting **Manage Company** from the *Resource Center Home* page **Welcome** drop down list.

To update your company's information, complete the following steps.

- 1. Your Company Name should be shown from your entry on the Register Your Company screen.
- 2. Enter the first line of your company Address.
- 3. Enter the second line of your company Address.
- 4. Enter the **City** for the company.
- 5. Select the **State** for the company from the drop down list.
- 6. Enter the **Zip** or **Postal Code** for the company.
- 7. Select the **Country** for the company from the drop down list.
- 8. Select the **Company Type** from the drop down list.
- 9. Your **Company Website** should be shown from your entry on the *Register Your Company* screen.
- 10. Select Save.

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### Managing Members of Your Team

The Manage Members screen includes a list of members who have joined your company.

To open the *Manage Members* screen, select **Manage Team** from the *Resource Center Home* page **Welcome** drop down list.

To edit one of your Company Members, complete the following steps.

- 1. Select the **Edit** button next to the name of the team member you want to change.
- 2. Enter or change the **Title** for the selected team member.
- 3. Check or clear the Resource Center User **Account Admin** box and/or the **SLIQ** box to grant or remove privileges to edit access and permissions for your company.
- 4. Check or clear the **SLIQ Permissions** boxes to grant or remove privileges to perform the indicated actions in SLIQ for your company.
- 5. Select **Save**.

# Inviting a Member

Your account can initially have up to five members or users to manage your company information. Once you have registered your company, you can invite additional members to your account.

To open the *Invite Member* screen, select **Invite Member** from the *Resource Center Home* page **Welcome** drop down list

To invite a member, complete the following steps.

- 1. Enter the **First Name** of the person you want to invite.
- 2. Enter the **Last Name** of the person you want to invite.
- 3. Enter the **Email** address for the person you want to invite.
- 4. Enter the **Title** for the person you want to invite.
- 5. Check the Account Admin to provide administrative privileges to the person you want to invite.
- 6. Select Invite.

The person you invited will receive an email message with a link for joining the company.

The invitee should click on the link. The *Create Account* screen opens with the First Name, Last Name, and Email address already completed. Refer to <u>Creating an Account</u> for more information.

Once the invitee has created an account, the Company Invitations screen opens.

- Check the Agree to Terms and Conditions box. You can select View to see the Terms and Conditions text.
- 2. Select **Accept** to accept the invitation.

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# Signing In

You'll need to sign in to access premium content.

To open the Account Login screen, select **Sign In** from the Resource Center Home screen.

To sign in, complete the following steps.

- 1. Enter your **Username** (your email address).
- 2. Enter your **Password**.
- 3. Check the **Remember Me box** if you want your current computer to remember your log in information.
- 4. Select Login.

The *Resource Center Home* screen opens. The account actions menu includes the word **Welcome** along with the name associated with your user account.

#### Retrieving a Lost Password

If you forget your Resource Center password, you can retrieve it.

To open the *Password Recovery* screen, select **Forgot Password** from the *Account Login* screen.

To retrieve a lost password, complete the following steps.

- 1. Enter your **Email** address.
- 2. Select Reset Password.

You will receive an email with instructions for resetting your password.

- 3. Click on the link in the email or paste the address into your browser to open the *Reset Password* screen. The Reset Code will be entered on the *Reset Password* screen.
- 4. Enter your **New Password**. The password must be at least eight characters long and include at least one non-alphanumeric symbol.
- 5. Retype your **New Password** to confirm it.
- 6. Select Reset Password.

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# **Making Purchases**

You will go to the *Product Catalog* screen to buy SLIQ monthly subscriptions, yearly subscriptions or 5-user add on packs.

To open the *Product Catalog* screen, select **Buy SLIQ** from the *Resource Center Home* screen gray navigation menu.

To make a purchase, complete the following steps.

- 1. You can select the More Info link to see additional information about the selected product.
- 2. To purchase more than one of the selected item, enter a number next to the quantity.
- 3. Select **Buy Now** next to the item you want to purchase.

Note that if you have not yet signed in, you will first go through the account registration process. Refer to <u>Creating an Account</u> for more information.

The Cart screen opens for you to complete your purchase.

### Completing Your Purchase

To complete the purchase, complete the following steps.

- 1. If applicable, enter a Coupon Code. Select **Apply Coupon**.
- Check the I agree to the End User License Agreement box. To see the agreement, select the
  Click here link. You cannot complete your purchase if you do not agree to the End User License
  Agreement.
- 3. To remove one item from your cart, select the **Delete Item** button next to the item you wish to remove.
- 4. To remove all items from your cart, select the **Empty Cart** button.
- 5. If you make changes to your cart, select the **Update Cart** button to recalculate your purchase price.
- 6. If you wish to add additional items to your cart, select the **Continue Shopping** button.
- 7. When you are ready to complete your purchase, select **Checkout**.

#### The *Checkout* screen opens.

- 1. Enter the **First Name** for the credit card holder. The name associated with your user account is prefilled, but you can change it.
- 2. Enter the **Last Name** for the credit card holder.
- 3. Enter the first line of the **Address** for the credit card holder. Remember that this is the credit card billing address, which may not be the same as the company address.
- 4. Enter the second line of the **Address** for the credit card holder.
- 5. Enter the **City** for the credit card holder's address.
- 6. Select the **State** for the credit card holder's address from the drop down list.
- 7. Enter the **Zip Code** for the credit card holder's address.
- 8. Select the **Country** for the credit card holder's address from the drop down list.
- 9. Enter the credit card holder's contact **Phone Number**.
- 10. Enter the credit card holder's contact **Email Address**.
- 11. Select the credit card **Type** from the drop down list.
- 12. Enter the credit card Number.
- 13. Enter the credit card **Security Number**.
- 14. Select the month that the credit card expires from the **Expiry Date** drop down list.
- 15. Select the year that the credit card expires from the Year drop down list.
- 16. Select Place Order.

You can access your products immediately.

## **Viewing Subscriptions**

The Subscriptions screen displays any subscriptions you have signed up for with recurring billing.

To open the *Subscriptions* screen, select **Billing** from the *Resource Center Home* page **Welcome** drop down list

Your subscriptions are listed.

- 1. Select **View Order** to view the order associated with the selected subscription. The Order Details are displayed. Select Order List to perform a search by order number or end date. You can also download a PDF of the order.
- 2. If you want to cancel your subscription, select **Cancel Subscription**. Note that you will lose access to SLIQ for your user account and any other users associated with the company.