Home Portal

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complete customer experience

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1.1   Register

Home Portal allows the user to go home and register themselves or their children using their Membership Card Number, the participant's Post Code and the participant's date of birth.

When you open Home Portal the options are to log on if it's an existing user or to register if not.

Select **Register Now**

Register Now

	Step 1 Locate your member record	Step 2 Answer security questions	Step 3 Link additional members	Step 4 Finalise your registration

	Member Number	10001037	⇨ enter the participant's member mumber

Continue

Step 1 is to enter the member's card number. This is sent out in the contact trigger and can also be found in the top right of the members profile.

Step 2 is to enter the postcode and date of the member.

Step 3 is to add any additional members

Step 4 is to finalise registration.

Once the 4 steps have been completed an email will be sent to the members email address with a link on it. This link must be clicked to activate the Home Portal.

1.2   Log on

When you open Home Portal the options are to log on if it's an existing user or to register if not.

Once a new user has been registered their email address or card number and the password created are used to log on.

1.3   Overview

Once the log on details has been entered correctly the overview screen is displayed.

This will show all classes that the person or people if multiple people are sharing home portal are currently enrolled on to.

Anything requiring attention – ie the child has been flagged to move - will be marked with a yellow box.

1.4   Registered People

On the left hand side of the screen the names of the people registered under this home portal will be displayed.

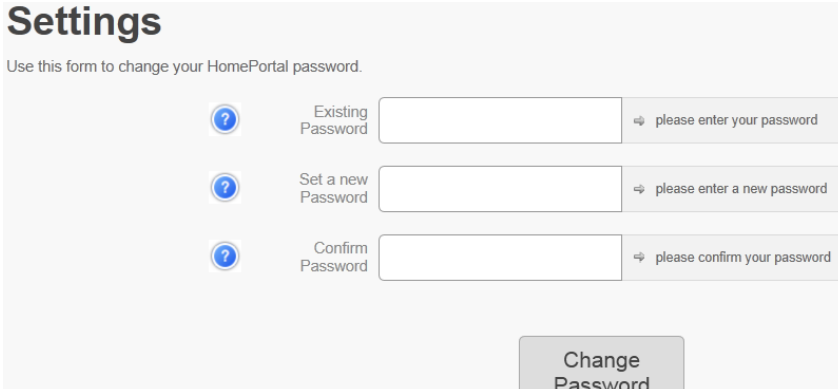Selecting the name of the person will allow the progress to be viewed.

Select **More...** to view the competencies and the progress as a percentage within that course.

1.5   Settings

Select the tab to change the home portal log on password.

Enter Existing Password.

Enter New Password.

Enter Password Confirmation.
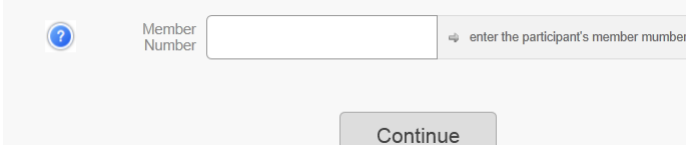
1.6   Add more people to Home Portal

Select **+ Add More** to add more people to the home portal screen.

You will need the membership numbers of the people you want to add to Home Portal.
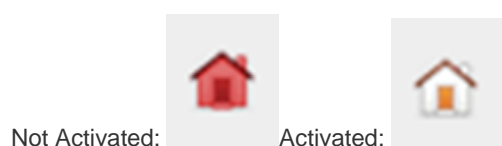
2   Reception

The Home Portal process takes place away from Reception; however, for various reasons (from time to time) a user may need assistance to register.

Within the customer's personal profile is a box entitled "Home Portal". This allows the user to view the registered email address, view if the account has been activated, Reset a User's password or Deactivate their account.

A user must register for HomePortal for their "Home Portal" box to be activated. If a user has not registered for HomePortal their box will appear like this:

As part of the registration process, the user will be asked to activate their account by clicking an email link (sent once they have completed the Registration form). If the customer doesn't receive or doesn't click this email link, they will be unable to log in to HomePortal. It is easy to tell if a customer has not activated their account, as their HomePortal box will look like this:

It is also possible to tell if a customer has not activated their HomePortal account as the House Icon that appears next to their name in all Lists is shown in red:

Not Activated: Activated:

Resend Activation Email will send them a new email with a new link to click and activate their account.

Finally, **Activate Account** will allow the user to login without the need to confirm their email address.

However, this could mean that their email address is incorrect, so carefully confirm this before selecting this as an option.

Once a user has an activated account, their status appears as "Activated". You will be presented with two options.

Deactivate which will force the user to setup their account from scratch.

Reset Password will send the user an email allowing them to reset their password. Note that deactivating a users account does not alter their data within CoursePro. It simply allows the user to re-register for HomePortal.