



Service **Autopilot**™

MARKETPLACE

USER GUIDE

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Summary

Service Autopilot offers a Marketplace that serves as a platform for content distribution. This platform contains a variety of items, including automations, documents, and forms created by Service Autopilot and general clients. These items may be available for a fee or at no cost to you.

Getting Started

You can get started using the Marketplace right away because it's available to all Service Autopilot members. If you want to enable **Marketplace Publishing** then you'll need to contact SA to enable that feature. Before using the Marketplace, you must first grant permissions at the employe-level. This section explains setting up User Roles & Rights for the Marketplace.

The Marketplace

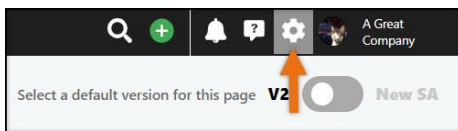
The Marketplace is automatically enabled for every SA account. However, you must still grant resources the ability to access the feature (User Roles & Rights). If you want to publish content to the Marketplace, then SA *must* enable the Marketplace Publishing functionality before you can assign your User Roles & Rights. This may be the case if you're an SA Certified Advisor.

User Roles & Rights

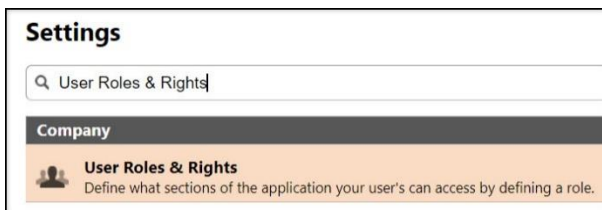
User Roles & Rights allow you to grant different resources the ability to view and publish to the Marketplace depending on their role.

To manage your User Roles & Rights, follow these steps:

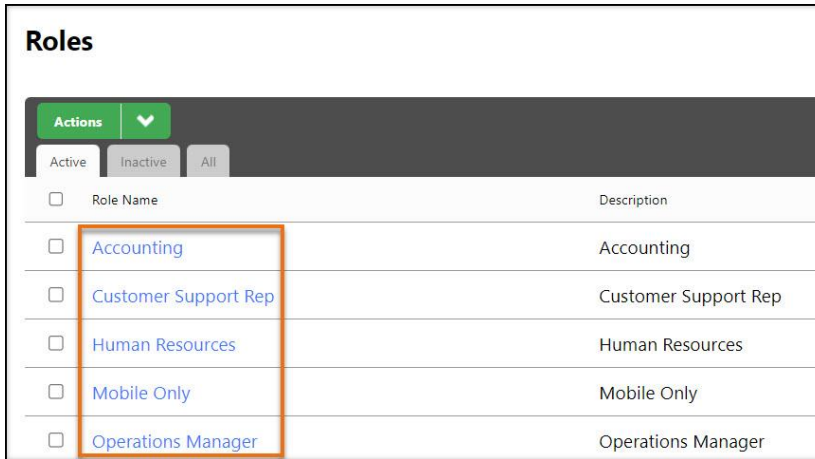
1. Click the **Settings** gear icon.



2. Select **User Roles & Rights**



3. Click a **User Role** to open the Edit Role overlay.



4. Under the **Home** tab, select the “View Marketplace” checkbox to let users view and download Marketplace items.
 If your company publishes to the Marketplace, you’ll see a “Marketplace Publishing” checkbox, as well. Select this checkbox if you want the user to publish content to the Marketplace on behalf of your company.



5. When you’re done, click **Save**.

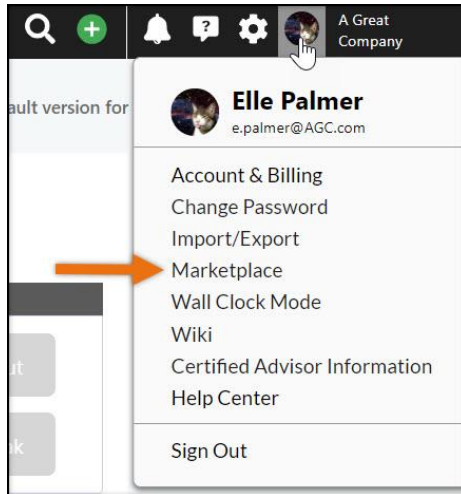


View the Marketplace

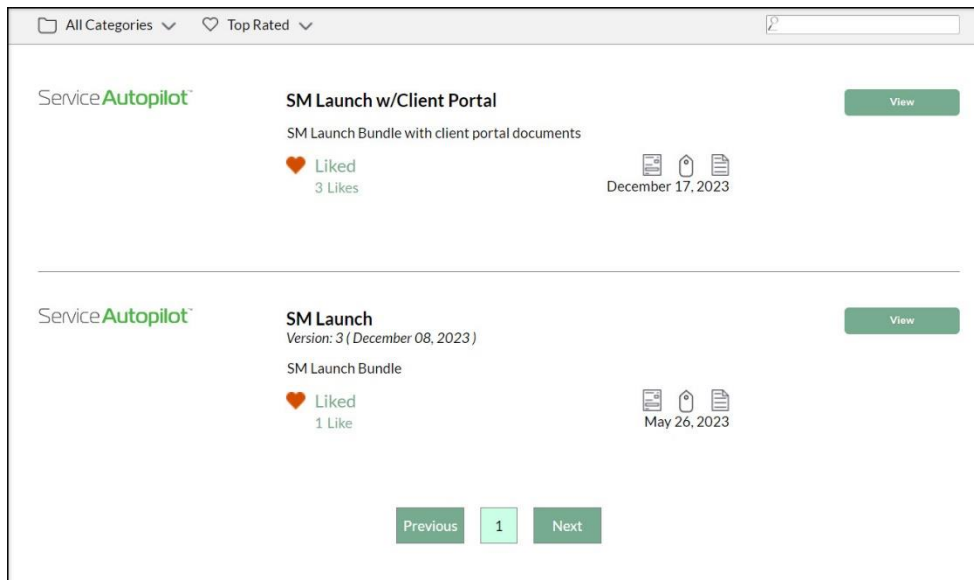
After you enable the Marketplace and assign User Roles & Rights, you'll see the **Marketplace** option under your **Avatar** icon.

To access SA's Marketplace, follow these steps:

1. Go to your **Avatar icon > Marketplace**.



2. The Marketplace screen appears.



Understanding the Marketplace

Filter Options

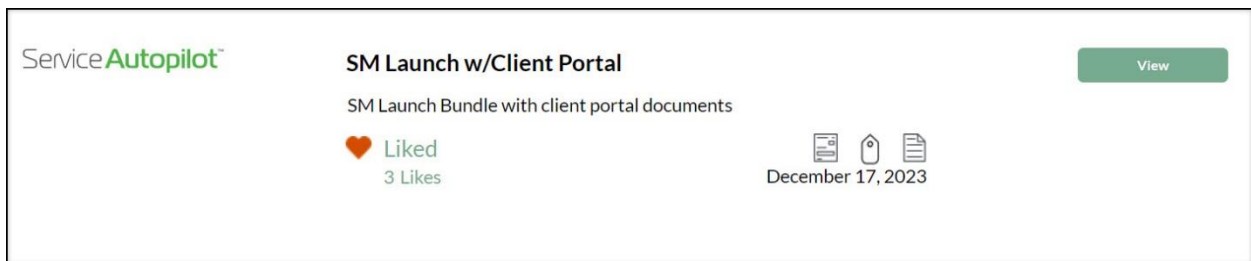
Filter options are located on the top-left of the Marketplace screen. These options help you filter the content displayed by categories or ratings. The two options are:

- **All Categories** – This will list Marketplace items based on tags.
- **Top Rated** – This will list the top ten Marketplace items based on likes.



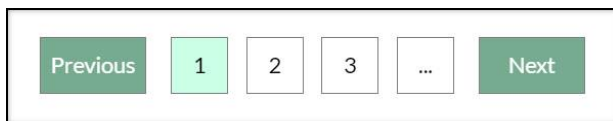
Marketplace Items

The Marketplace contains an array of Marketplace items. Each item can be composed of automations, forms, and more. Furthermore, each item will include a title, description, date of creation, keywords, and likes. Click the **View** button to see the [Item Details](#) screen.



Page Navigator

The page navigator lets you easily view Marketplace items. The navigator indicates the page number and current position with green highlighting. To navigate to a different page, click any of the buttons.



Search Bar

The search bar allows you to quickly search for your desired items. You can search for titles, descriptions, or keywords.

Simply click the search bar, type your information, then tap **Enter** on your keyboard.



Item Details Screen

You'll see the Item Details screen when you click the **View** button on a Marketplace item. This screen shows all the package items within a *Marketplace item*. On it, you can see the title of the item, its description, and the logo of the company that published the item:

- Company Logo** – This is the company logo associated with this Marketplace item.
- Title** – This is the title of the Marketplace item.
- Description** – This is the general description of the Marketplace item.
- Download Button** – This button lets you download the Marketplace item.
- Download Icon** – This shows how many times the Marketplace item has been downloaded.
- Like Button** – This button shows how many people have liked this item. You may also click the button to like it.
- “This Bundle Contains” list**– This section shows all items included within this specific Marketplace item, such as automations, forms, and tags.



Downloading a Marketplace Item

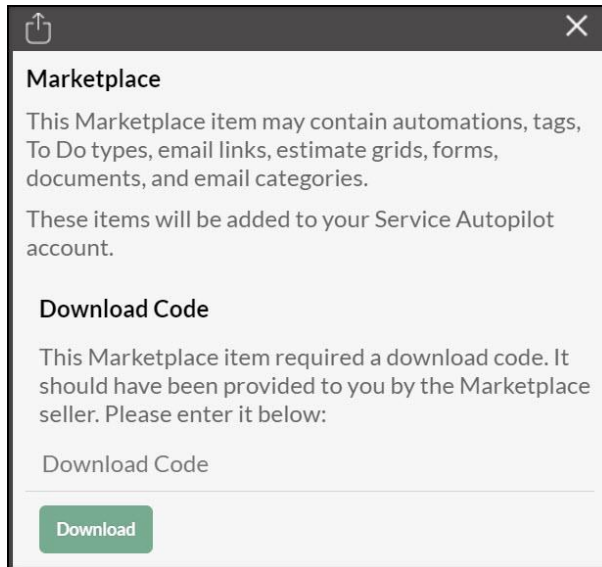
You can download any published item listed in SA's Marketplace. *All* listed items are available for download. Check the Marketplace Item Details screen to see whether an item is free or requires a purchase. To download a Marketplace item, follow these steps:

1. Hover over your **Avatar icon** then select **Marketplace** to access the **Marketplace**.
2. Identify a **Marketplace item** and click **View**.
3. Click the green **Download** button, which reads "Free."



Tip: Items created by Service Autopilot are free. If an item was created by a Certified Advisor, you may be asked to pay for it outside of SA to receive the item's Download Code.

4. A confirmation dialog appears. If you received a download code, enter it in the space provided.



5. When you're done, click **Download**.

Note: The confirmation dialog confirms the Marketplace and download code. This notice is generic and may not contain all the items listed. A download code confirmation will only appear if applicable.