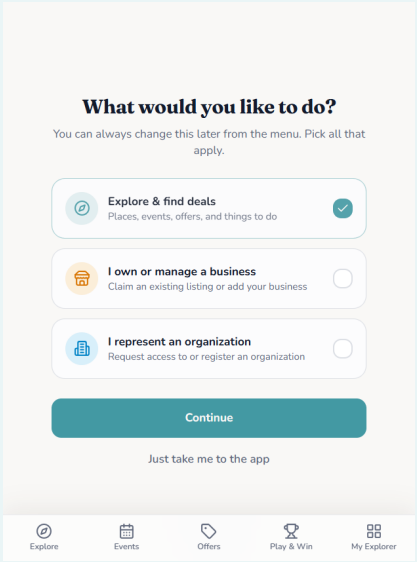
CE

Community Explorer
Onboarding Help

A concise visual guide for new users, businesses, organizations and market vendors.

BETA GUIDE

This guide reflects the current beta build. Screens, labels and individual steps may change as testing continues.

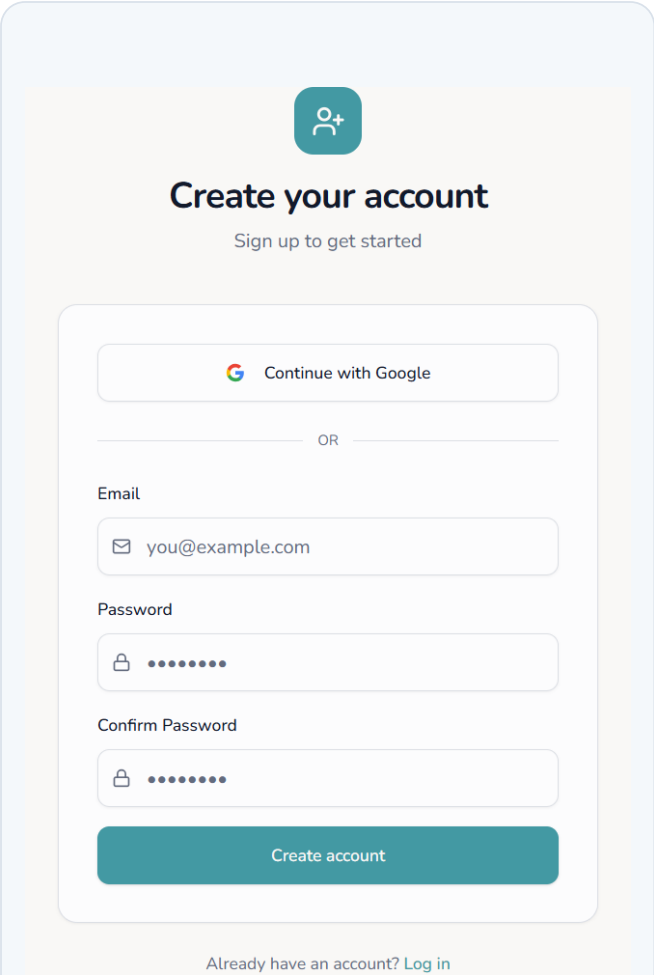


Current beta onboarding guide - September 2026

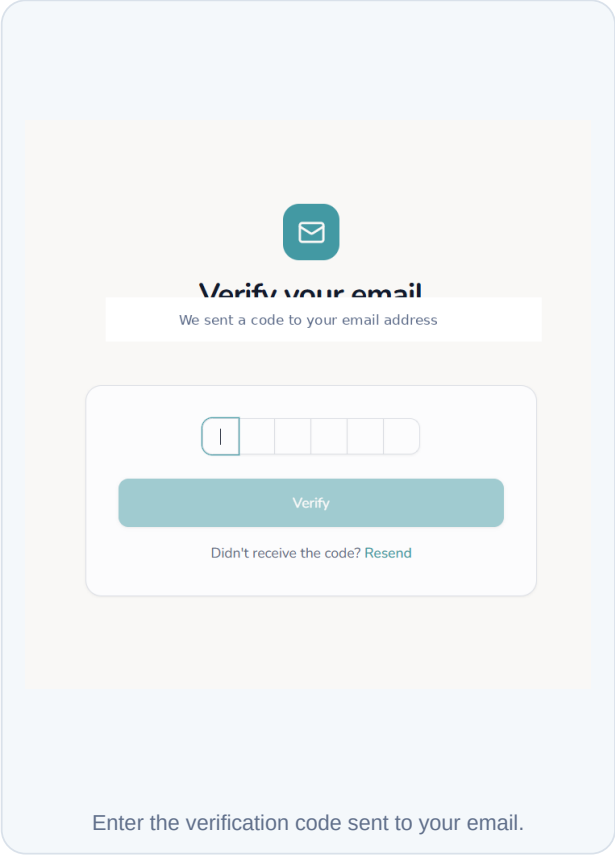
ACCOUNT SETUP

1. Create and verify your account

Create one account and use it for every role you add later - Explorer, business manager, organization representative or market vendor.



Create an account with Google or email.



Enter the verification code sent to your email.

What to do

- Use Continue with Google, or create an account with your email and password.
- If you sign up by email, enter the verification code Community Explorer sends you.
- Use the same account if you later manage a business or organization.

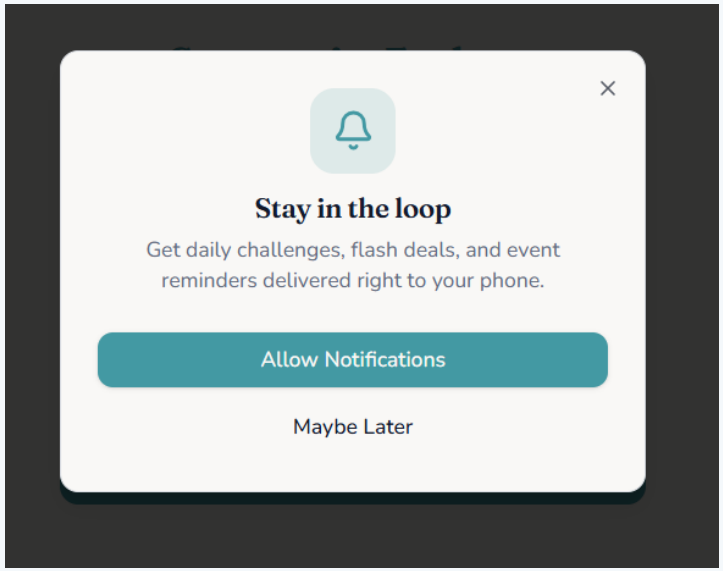
IF THE EMAIL DOES NOT ARRIVE

Check Spam or Junk folders and any secondary inbox tabs - for example, Outlook may place messages in Other. Then use Resend if needed.

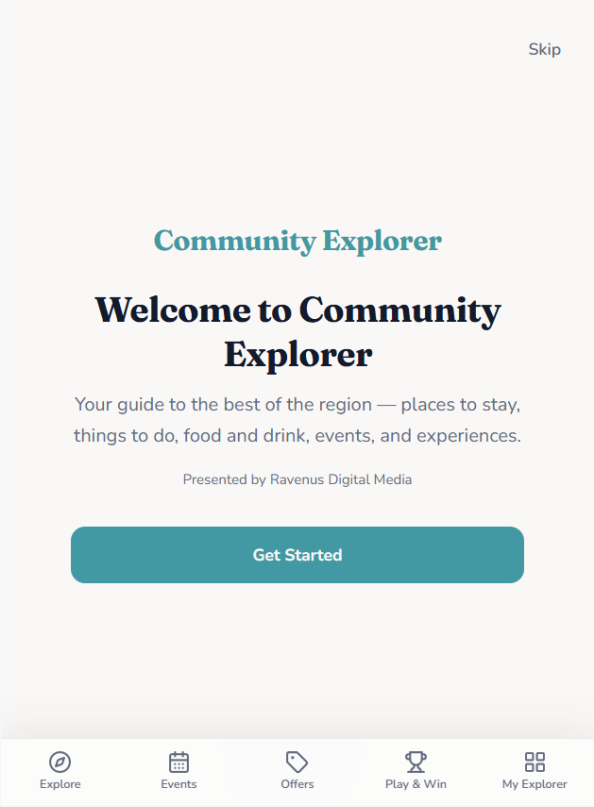
ACCOUNT SETUP

2. Finish the basic setup

After verification, Community Explorer introduces the main experience and asks whether you want notifications.



Notifications are optional - allow them now or choose Maybe Later.



Select Get Started to continue.

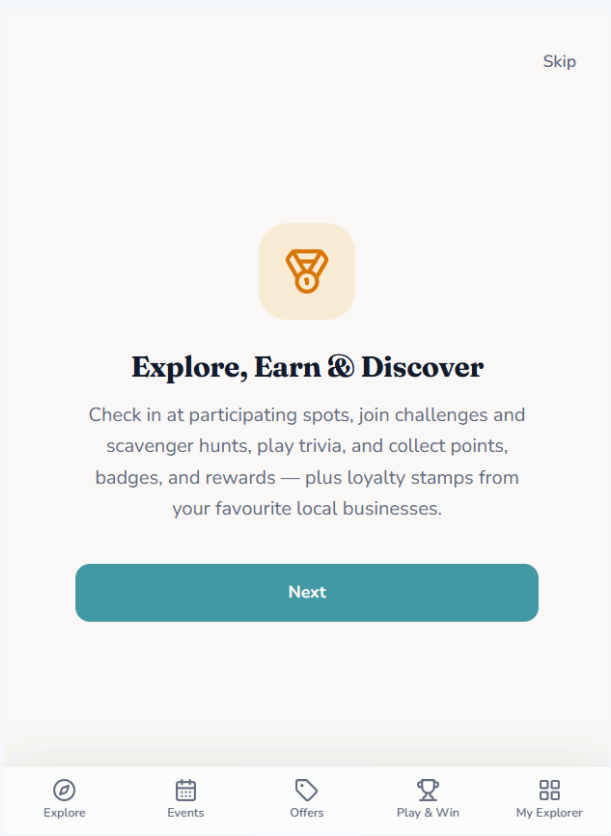
Guidance

- Allow Notifications if you want alerts for challenges, deals and event reminders.
- Choose Maybe Later if you prefer to decide later.
- Select Get Started to continue the introduction.

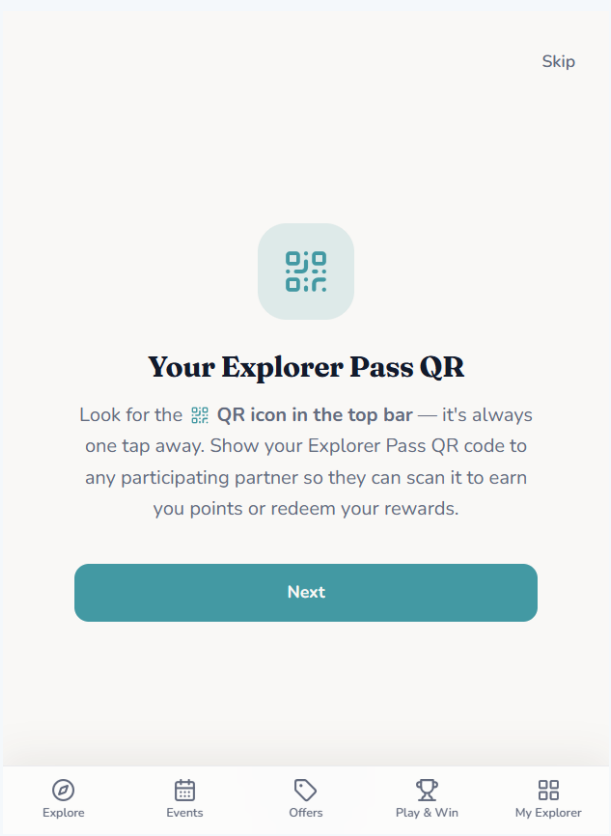
ACCOUNT SETUP

3. Learn the Explorer basics

The introduction explains check-ins, points, rewards and your Explorer Pass QR before you choose any business or organization roles.



Explore, check in, earn points and discover rewards.



Show your Explorer Pass QR to participating partners.

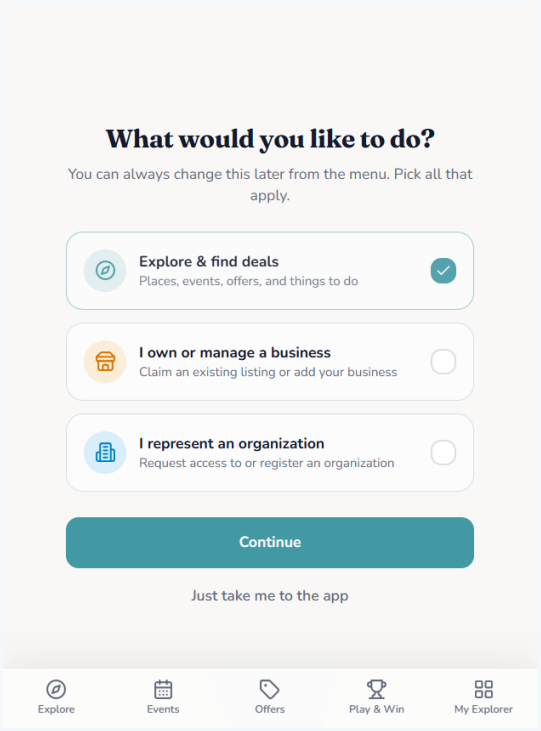
Remember

- You can use Community Explorer only as an Explorer.
- Your Explorer Pass QR is available from the QR icon in the top bar.
- Business and organization roles are optional and can be added later.

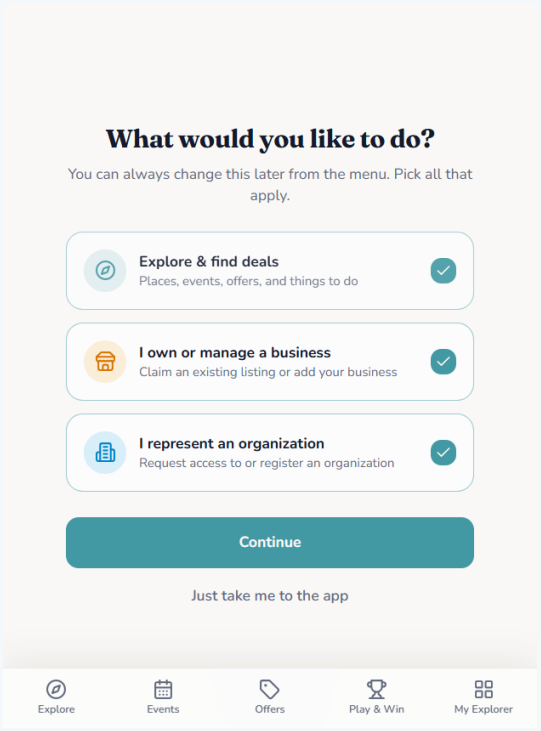
CHOOSE YOUR ROLES

4. Choose how you want to use Community Explorer

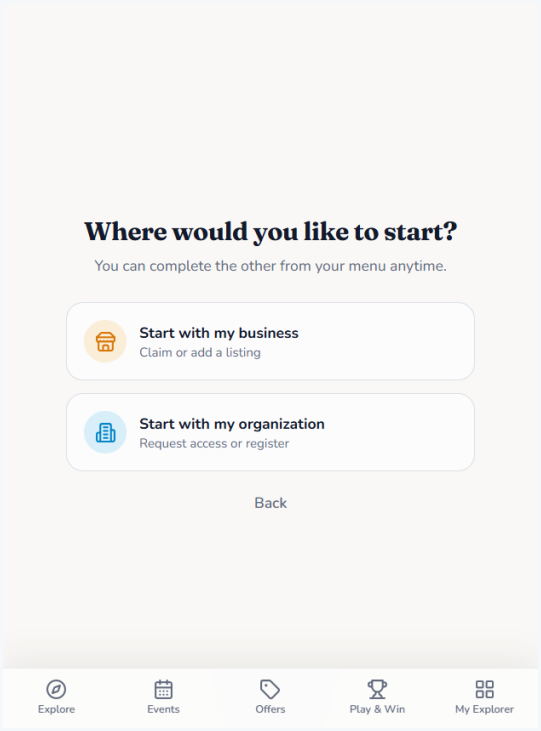
Select all roles that apply. One account can explore the community, manage a business, and represent an organization.



Explorer is selected by default.



Select business and/or organization if they apply.



If you selected both, choose which setup to start first.

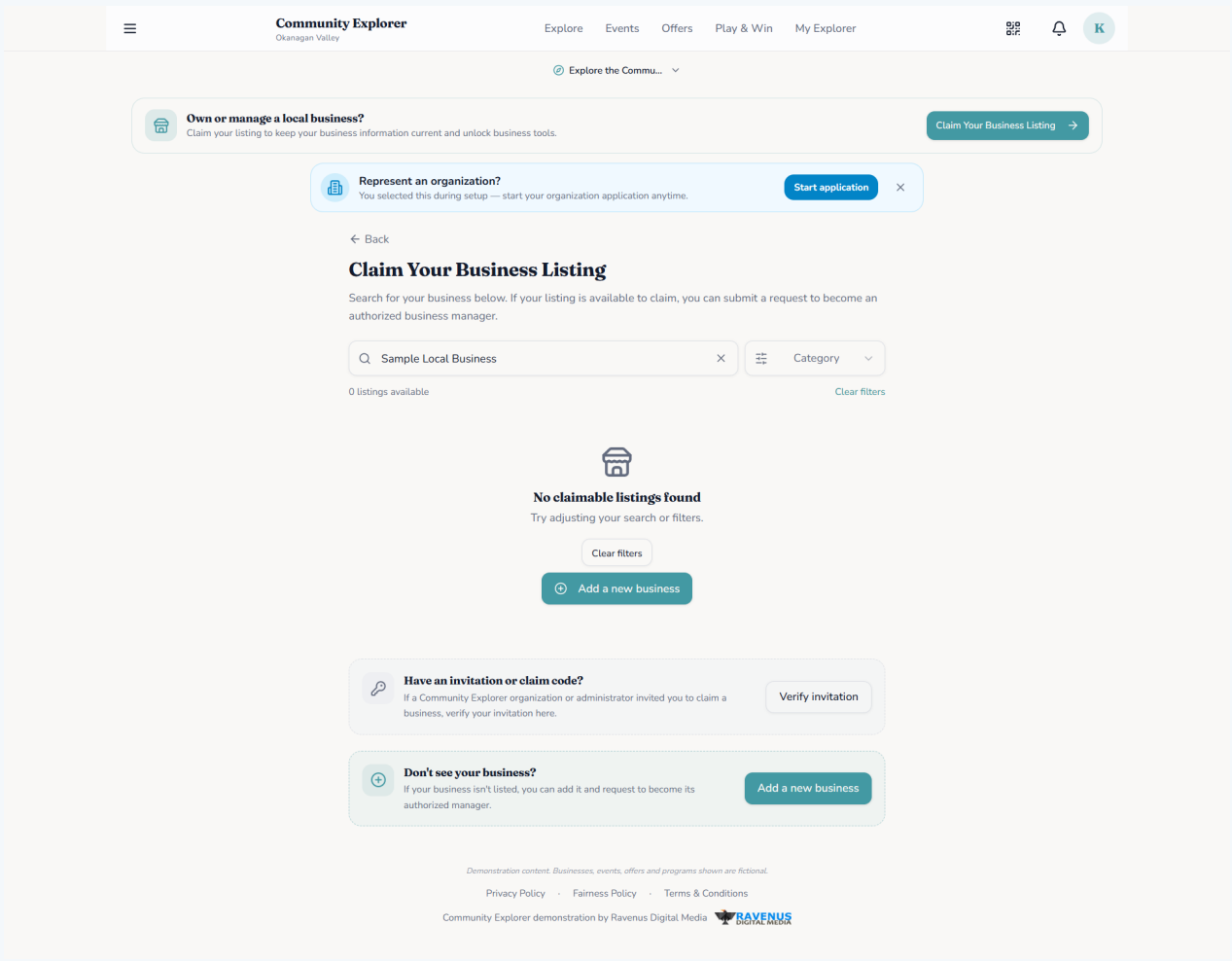
GOOD TO KNOW

You can return later and complete another path. Selecting more than one role does not create extra accounts.

BUSINESS ONBOARDING

5. Find, claim or add your business

Always search first. Claim an existing eligible listing when available; only add a new business when no suitable listing exists.



Search for your business before creating a new listing.

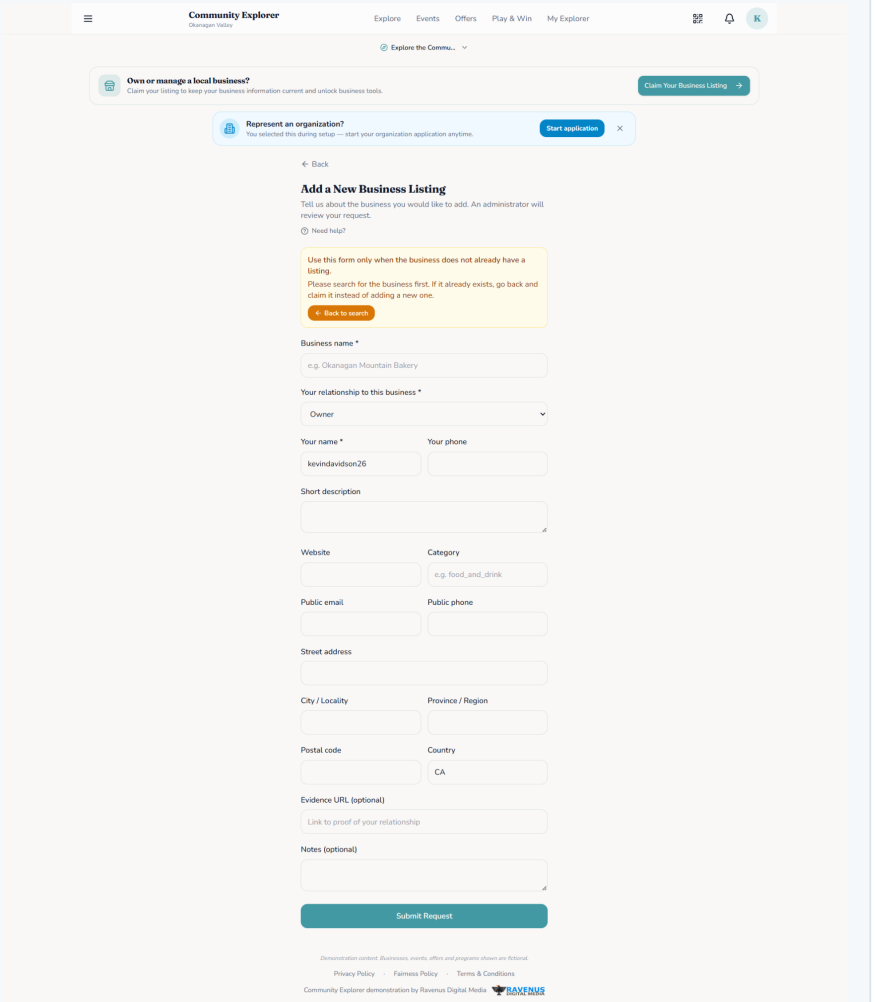
Business path

- Search by business name.
- If the business is available to claim, follow the claim request process.
- If no listing is found, choose Add a new business.
- Use Verify invitation only if an organization or administrator specifically invited you and supplied an invitation or claim code.

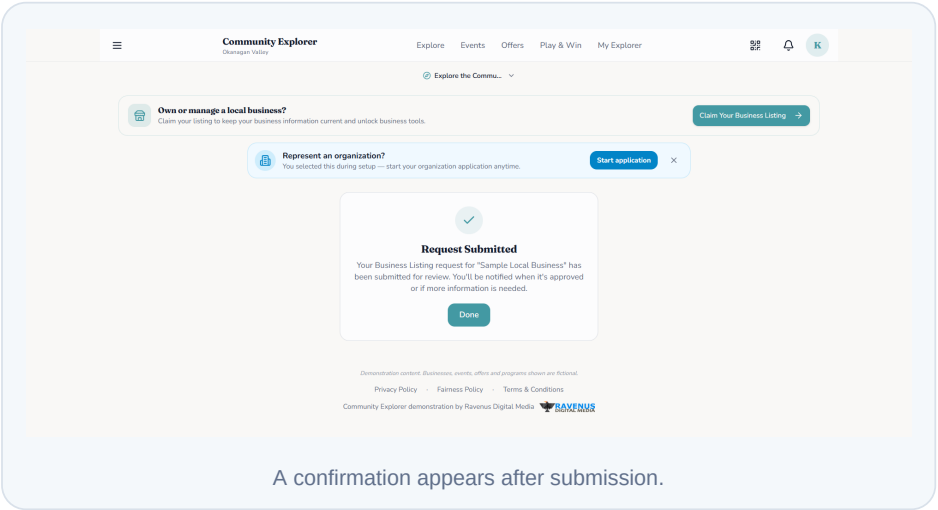
BUSINESS ONBOARDING

6. Submit a new business listing

Use the new-business form only when the business is not already listed. An administrator reviews the request before access is granted.



Complete the new business request form.



A confirmation appears after submission.

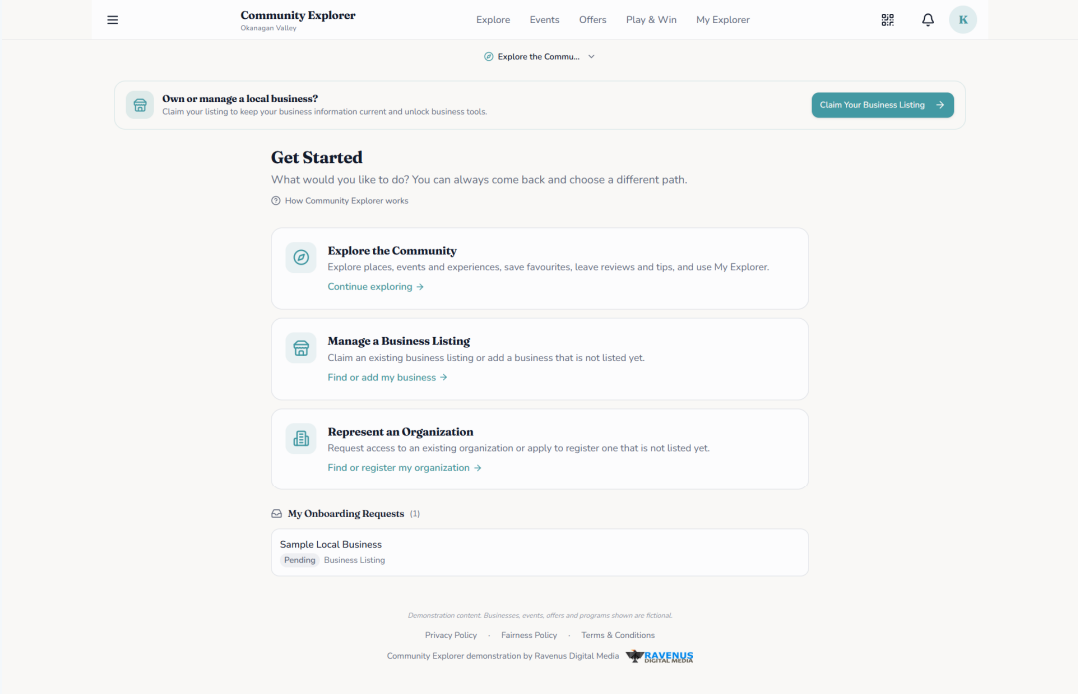
What happens next

- Submit the requested business details.
- A Community Explorer administrator reviews the request.
- You are notified when the listing is approved or if more information is needed.

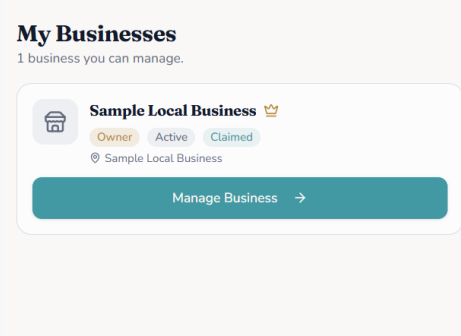
BUSINESS ONBOARDING

7. Track approval and open your business

Your onboarding requests remain visible while they are pending. After approval, the business becomes available from your account.



My Onboarding Requests shows pending and completed setup requests.



After approval, open My Businesses and choose Manage Business.

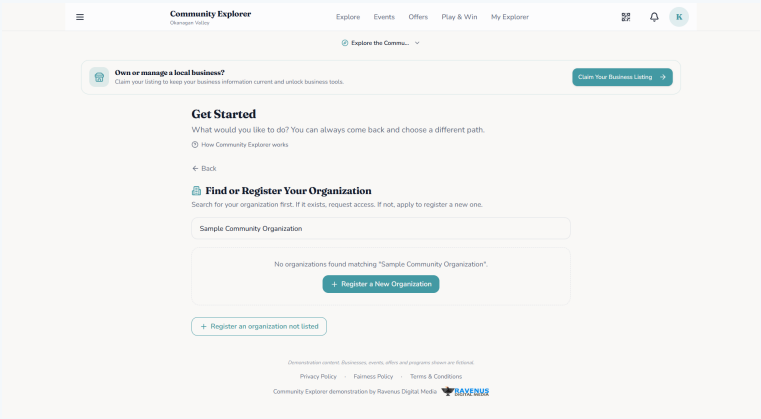
AFTER APPROVAL

Open the business workspace to complete the listing and start using business tools.

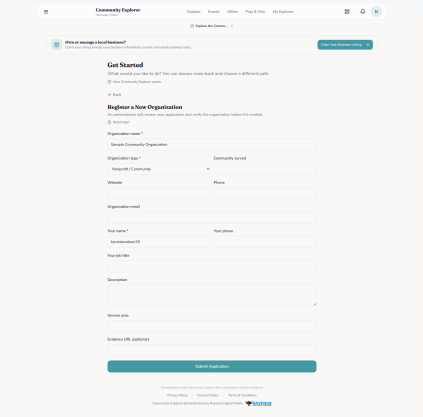
ORGANIZATION ONBOARDING

8. Find or register your organization

Search first. If the organization already exists, request access. If it is not listed, register a new organization.



Search for the organization before registering a new one.



If no match exists, complete the registration application.

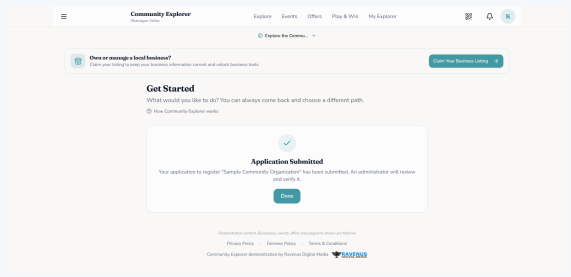
Organization path

- Search by organization name.
- If it exists, request access rather than creating a duplicate.
- If no match is found, register a new organization.
- Submit the application for administrator review.

ORGANIZATION ONBOARDING

9. Open the organization workspace

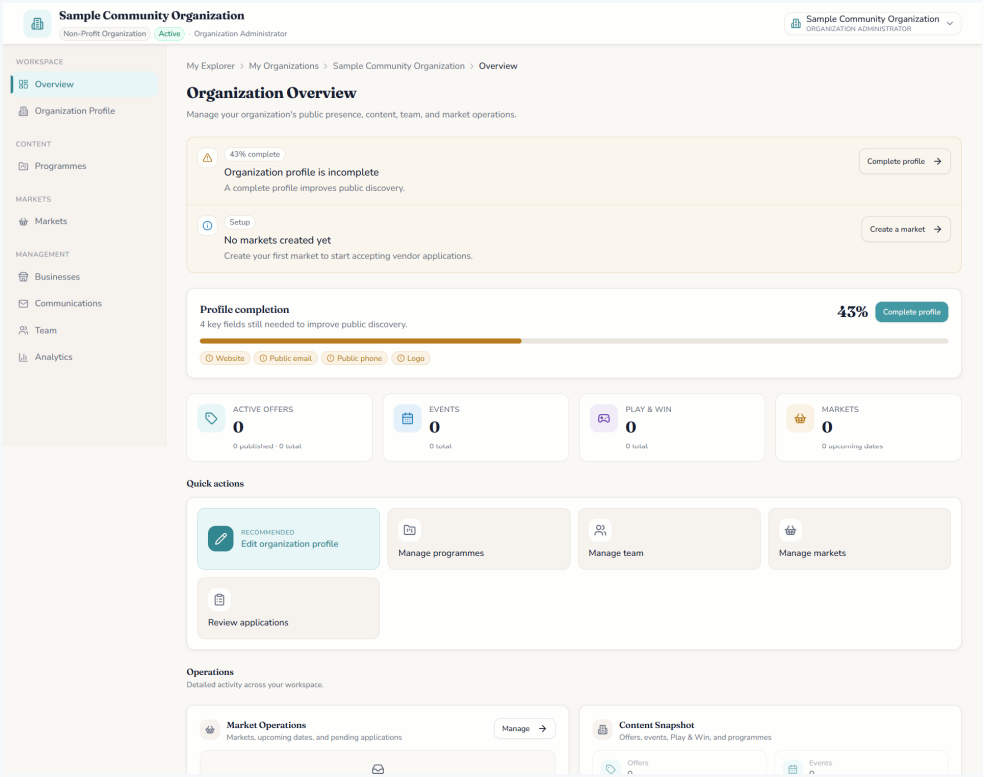
After approval, your organization appears in your account and you can start completing its profile, team and operational setup.



Submission confirmation while the application is awaiting review.

Inside the workspace

- Complete the organization profile.
- Set up programmes, markets, communications and team access as needed.
- Use the Overview page to see setup progress and recommended next actions.

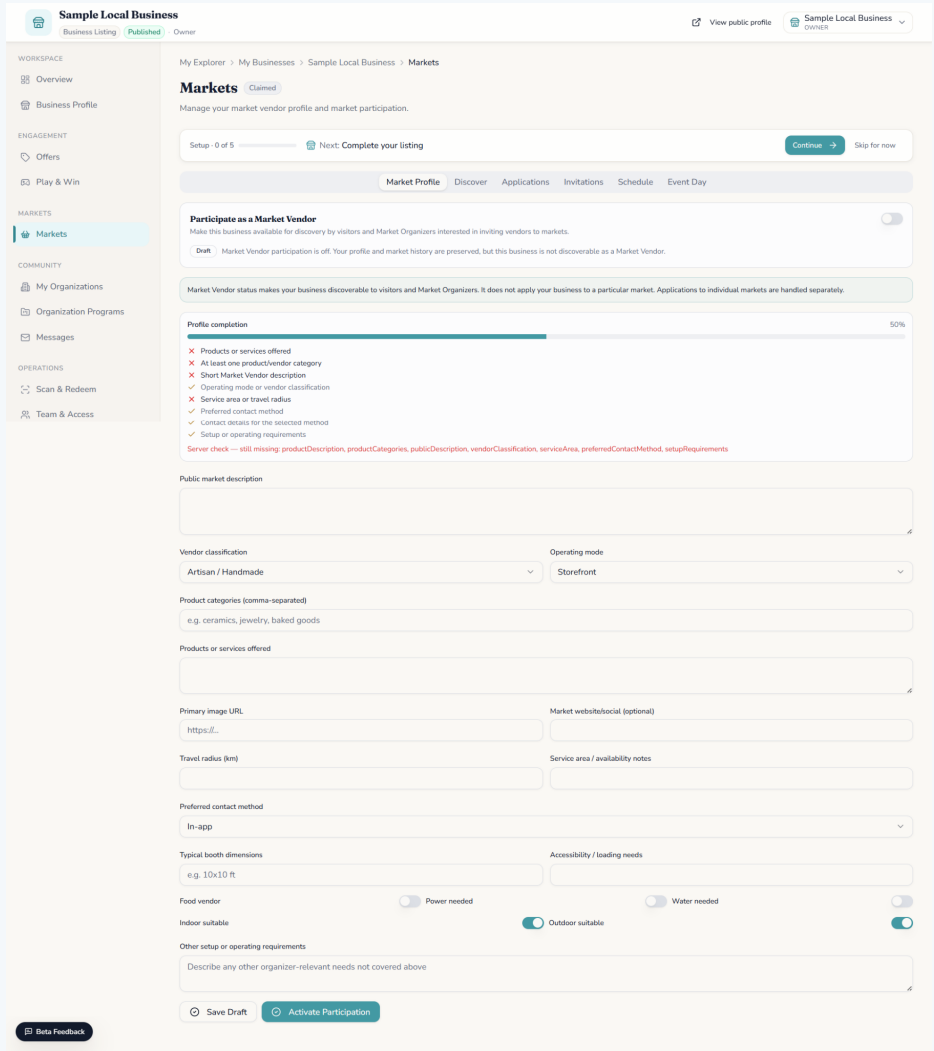


Organization Overview after approval.

MARKET VENDOR

10. Become a Market Vendor

An approved business can also participate as a market vendor. This is another role for the same business - you do not create a second business account.



Open Markets in the business workspace and complete the Market Profile.

Setup steps

- Open your business workspace and choose Markets.
- Complete the Market Profile information that applies to your business.
- Use Save Draft if you are not ready to finish.
- Activate participation once the required profile information is complete.
- Market Vendor status makes your business discoverable to visitors and market organizers. Applying to an individual market is a separate step.

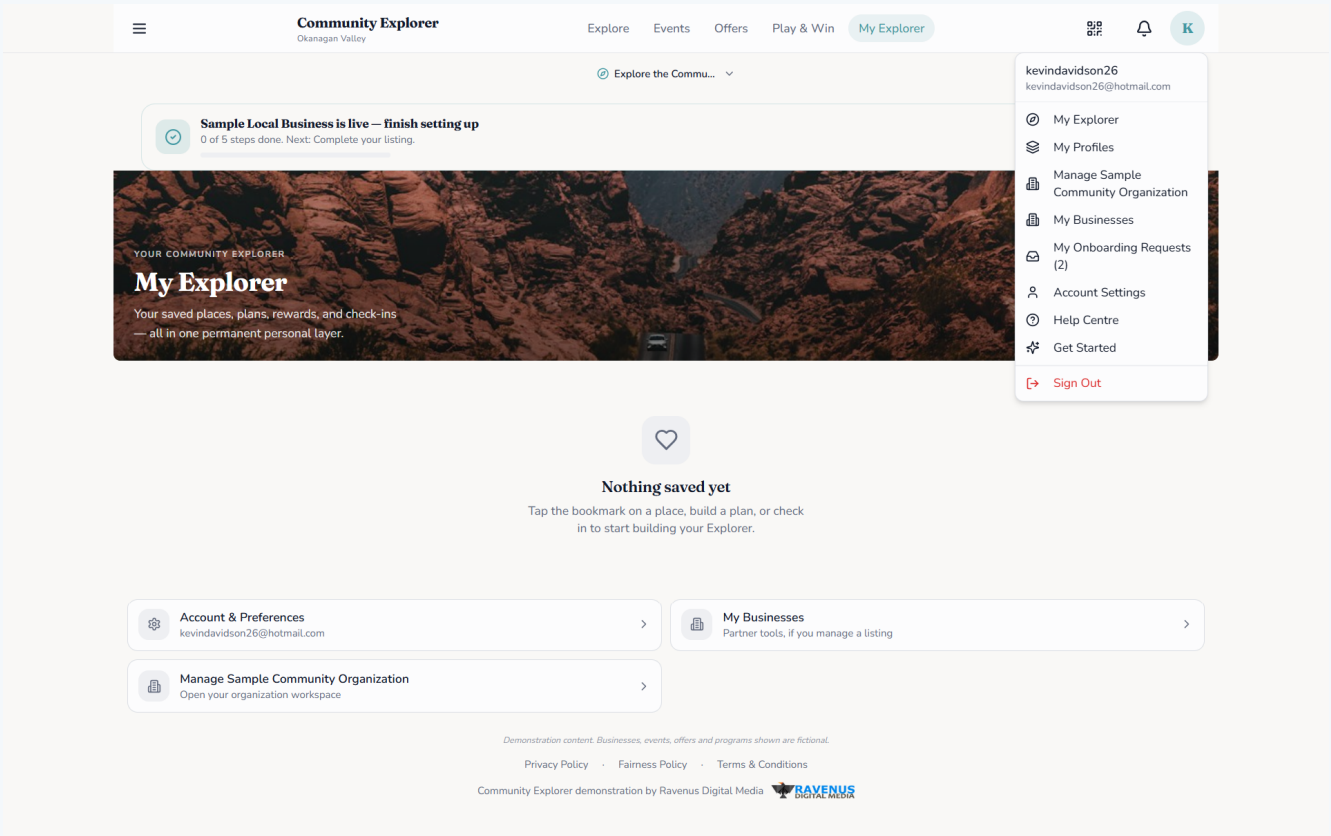
BETA NOTE

Some vendor labels and validation messages are still being refined during testing.

AFTER ONBOARDING

11. Find your workspaces and account tools

Once approvals are complete, use My Explorer and the account menu to return to businesses, organizations, onboarding requests, settings and help.



My Explorer and the account menu provide shortcuts to your workspaces and account tools.

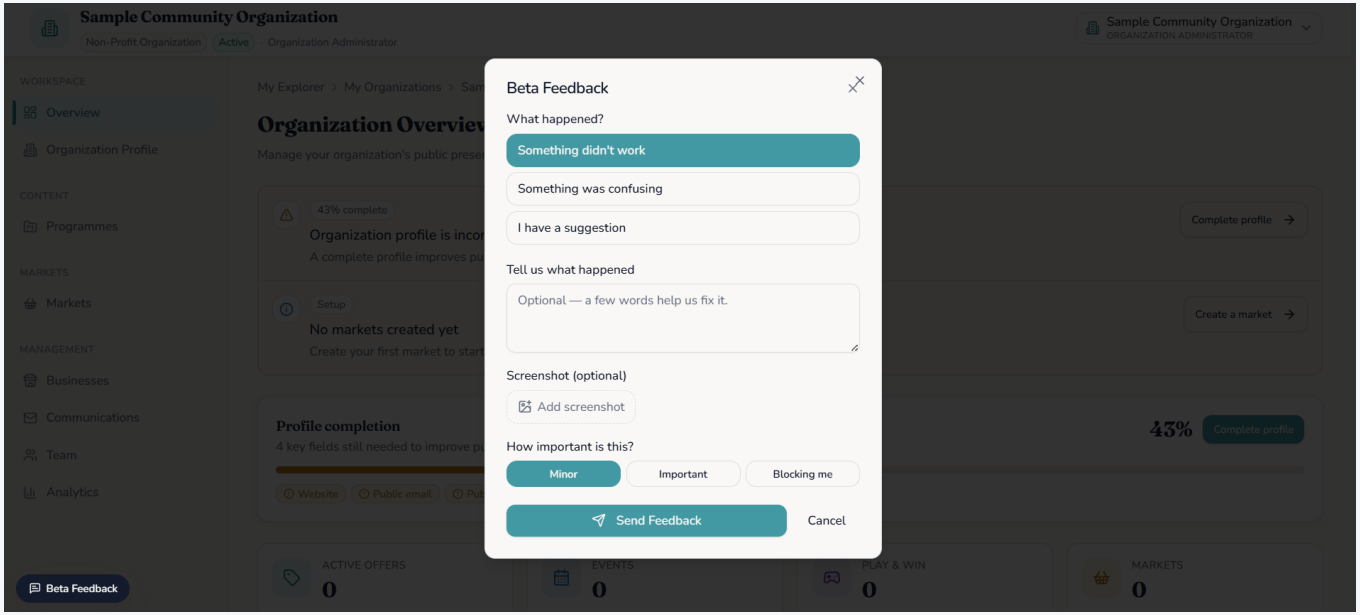
Useful shortcuts

- My Businesses - open and manage approved business listings.
- Manage [Organization] - open an organization workspace.
- My Onboarding Requests - check setup and approval status.
- Get Started - add another business or organization later.
- Help Centre - open available help articles.

HELP AND FEEDBACK

12. Use Beta Feedback when something is unclear

During beta testing, use the built-in feedback tool when something does not work, a screen is confusing, or you have a suggestion.



Describe the issue, attach a screenshot when useful, and choose its importance.

Useful feedback includes

- What you were trying to do.
- What happened instead.
- A screenshot when it helps explain the issue.
- Whether the issue is minor, important or blocking you.

HELP CENTRE

You can also open the Help Centre from your account menu as additional guidance is added.

QUICK REFERENCE

Onboarding at a glance

Use this checklist when you only need the basic path.

1. **Create one account**
   Use Google or email. If using email, verify the code sent to your inbox.

2. **Choose your roles**
   Explore, manage a business, represent an organization - or choose more than one.

3. **Business: search first**
   Claim an existing listing or add a new business only when it is not already listed.

4. **Organization: search first**
   Request access to an existing organization or register a new one.

5. **Wait for approval**
   Business and organization requests are reviewed by an administrator.

6. **Open your workspace**
   Use My Businesses or your organization entry after approval.

7. **Optional: become a Market Vendor**
   Use Markets in your business workspace and activate participation when ready.

EMAIL VERIFICATION TIP

If the verification email does not arrive, check Spam/Junk and secondary inbox tabs such as Outlook Other, then use Resend.

INVITATIONS

Claim codes are only for users specifically invited by a Community Explorer organization or administrator.