

 **READYWHEN**

QuickStart Guide

How to use: Digital Accounts

October 2021
Version 1.0

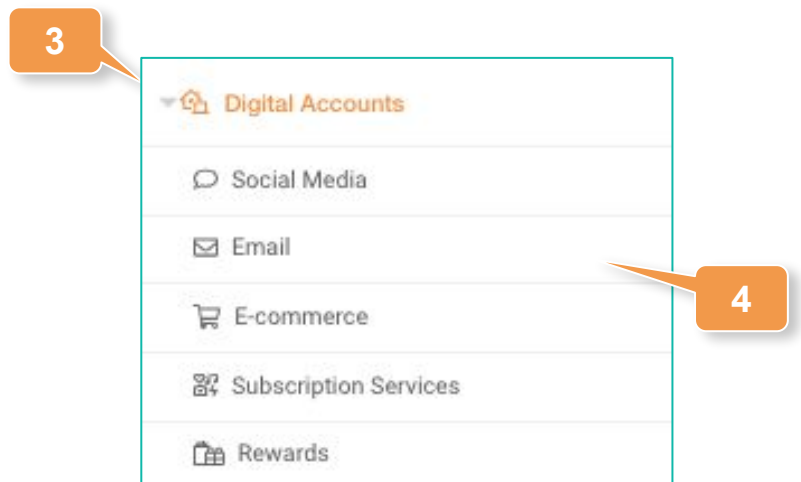
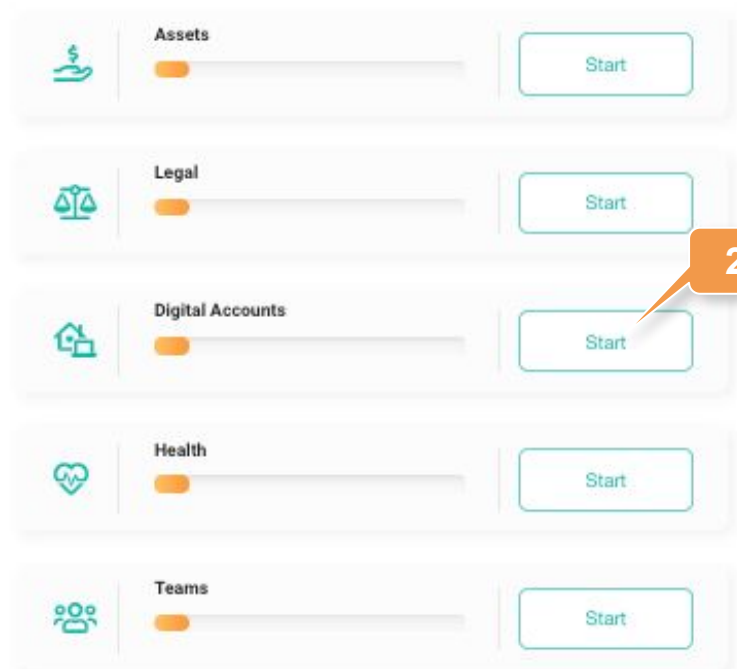
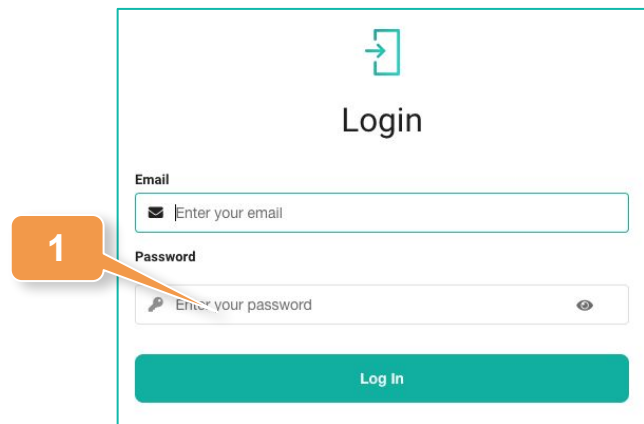


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Logging in and Navigation

1. Login to the ReadyWhen application at: <http://app.readywhen.ca>
2. Click the **Start** button for the relevant area of your dashboard to open it.
3. Alternatively, expand the relevant area in the left side navigation by clicking the right pointing triangle.
4. From the expanded list, click on the area you would like to open.



Adding Social Media

1. Click on **Social Media** in the left hand navigation or **Add Social Media** from the Digital Accounts Overview page.
2. Click **Add Social Media**.
3. Choose the social media account being added from the drop down list.
4. Add the email address associated with this account.
5. Passwords may be stored in the Additional Notes field.
6. Click **Save** to complete the record.



The screenshot shows a form titled "Add a Social Media Account" with the following fields and a "Save" button at the bottom. An orange callout bubble with the number "3" points to the form title. An orange callout bubble with the number "4" points to the "Email address associated with account" field. An orange callout bubble with the number "5" points to the "Additional notes" field. An orange callout bubble with the number "6" points to the "Save" button.

Add a Social Media Account

Name of social media account
Choose name

Email address associated with account *
Email

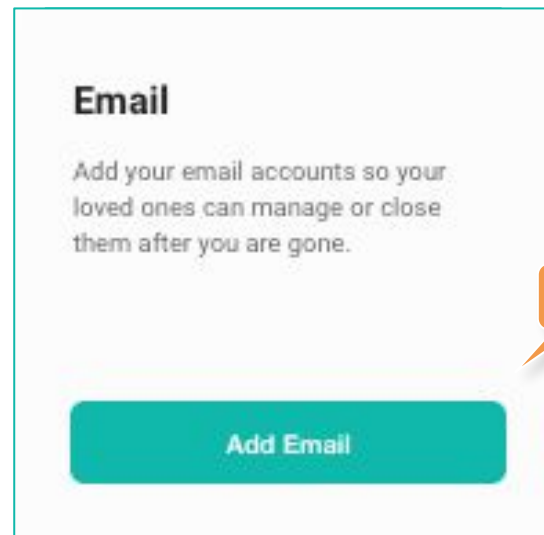
Username associated with account

Additional notes
Instructions for after I'm gone, etc

Save

Adding Email Accounts

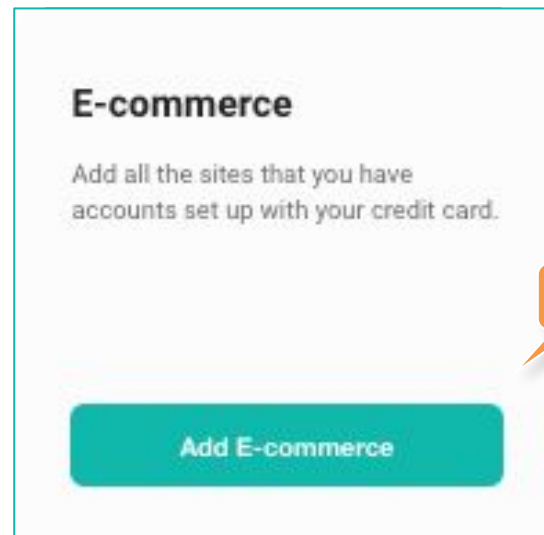
1. Click on **Email** in the left hand navigation or **Add Email** from the Digital Accounts Overview page.
2. Click **Add Email**.
3. Enter the email address associated with this account and how it is accessed.
4. Click **Save** to complete the record.



The screenshot shows a form titled "Add an Email Account". It contains three input fields: "Email address associated with account *" (with an email icon and the word "Email" inside), "Where do you go to access it? *", and "Additional notes". At the bottom of the form is a grey "Save" button. An orange callout bubble with the number "3" points to the first input field, and another orange callout bubble with the number "4" points to the "Save" button.

Adding E-commerce Accounts

1. Click on **E-commerce** in the left hand navigation or **Add E-commerce** from the Digital Accounts Overview page.
2. Click **Add E-commerce**.
3. Enter the website address of the accounts and the email associated with it.
4. Click **Save** to complete the record.



Add an E-commerce Website

Name or URL of e-commerce website *

amazon.ca, bestbuy.ca, ebay.ca, etc

Email address associated with account

Email

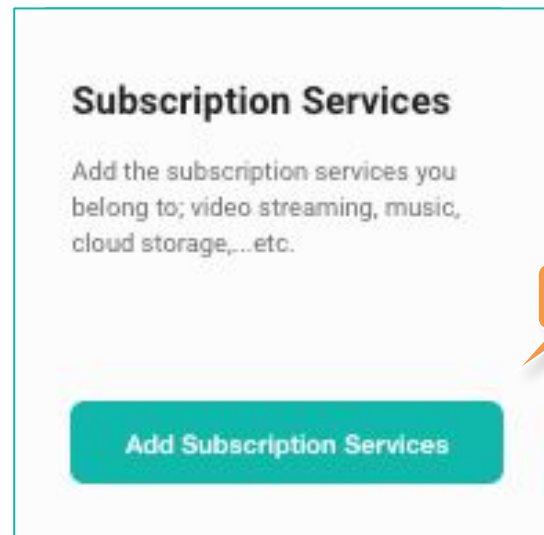
Additional notes

Save

This screenshot shows the 'Add an E-commerce Website' form. It includes a text input field for the website name/URL, an email input field, and a text area for additional notes. A 'Save' button is at the bottom. An orange callout bubble with the number '3' points to the first input field, and another with the number '4' points to the 'Save' button.

Adding Subscription Services

1. Click on **Subscription Services** in the left hand navigation or **Add Subscription Services** from the Digital Accounts Overview page.
2. Click **Add Subscription Services**.
3. Enter the name of the service and the email associated with the account.
4. Optionally, enter the last four digits of the credit card used for the service.
5. Click **Save** to complete the record.

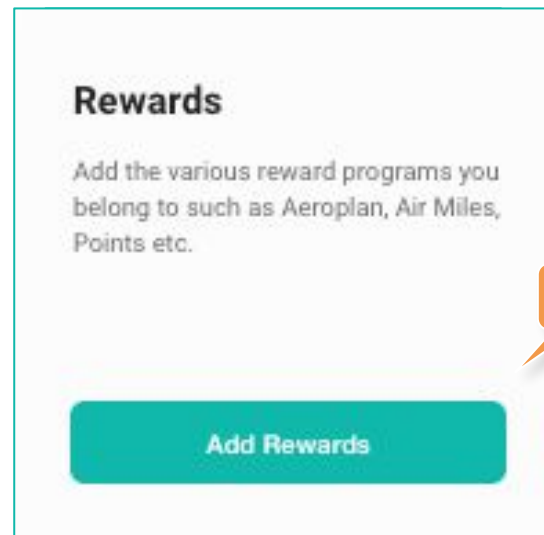


This screenshot shows the 'Add a Subscription Service' form. It has four input fields: 'Name of subscription service *' (with a placeholder 'Netflix, Disney, Amazon Prime, etc'), 'Email address associated with account *' (with an 'Email' icon), 'Credit card connected to the account (Last 4 Digits)', and 'Additional notes'. At the bottom is a grey 'Save' button. Three orange callout boxes are present: '3' points to the first field, '4' points to the second field, and '5' points to the 'Save' button.



Adding Rewards

1. Click on **Rewards** in the left hand navigation or **Add Rewards** from the Digital Accounts Overview page.
2. Click **Add Rewards**.
3. Enter the name or web address of the rewards program and, optionally, a username used to access it.
4. Click **Save** to complete the record.



The screenshot shows a form titled "Add a Rewards program". It contains three input fields: "Name or URL of rewards website *", "Username", and "Additional notes". The first field has a placeholder text: "Airmiles.ca, Aeroplan.ca, RBC Rewards, TD Points, etc". Below the fields is a grey "Save" button. An orange callout box with the number "3" points to the "Username" field, and another orange callout box with the number "4" points to the "Save" button.

Editing or Deleting an Asset

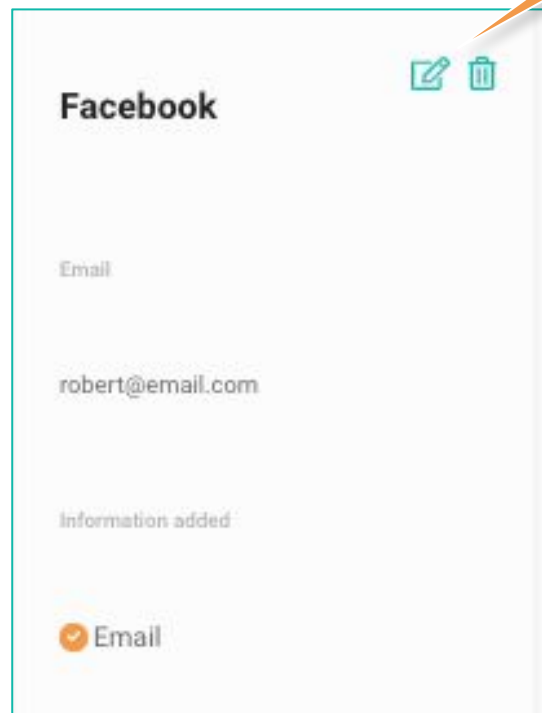
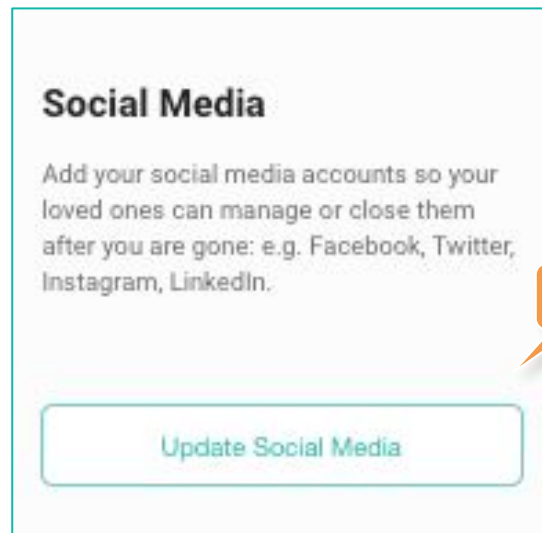
1. Expand **Digital Accounts** in the left hand navigation and click on the relevant section, or click **Update** within the Digital Accounts Overview page.

Editing

1. Click the **Edit** icon in the top right corner of the added asset.
2. Make any required changes or updates.
3. Click **Save** to complete the record.

Deleting

2. Click the **Delete** icon in the top right corner of the added asset.
3. Click **Confirm** to remove the asset.



Contact Support

The ReadyWhen Support Team is available to assist if needed. Contact us at:

T: +1.855.908.5292

E: support@readywhen.ca

W: <https://readywhen.com/support>