READYWHEN

QuickStart Guide

How to use: Teams

October 2021
Version 1.0

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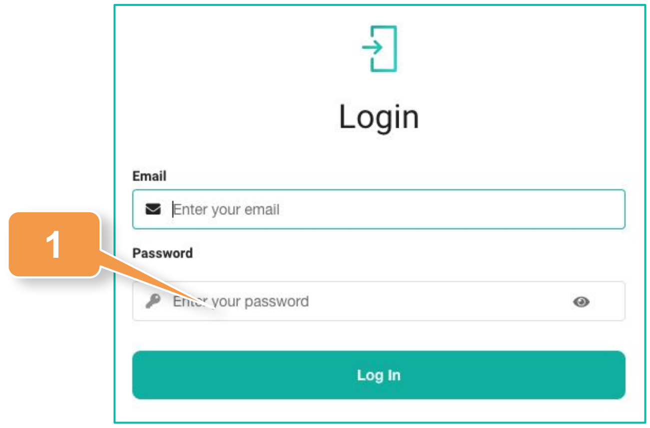
Logging in and Navigation

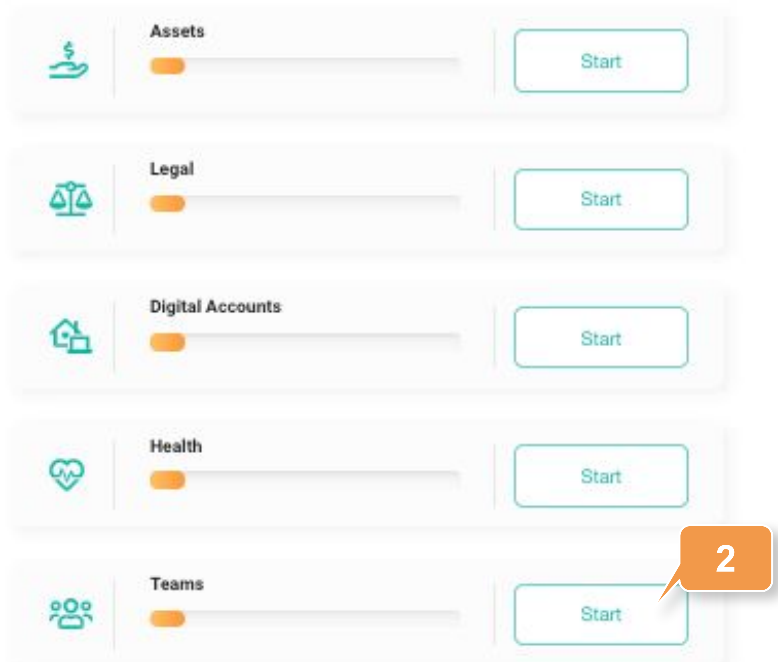
1. Login to the ReadyWhen application at: http://app.readywhen.ca

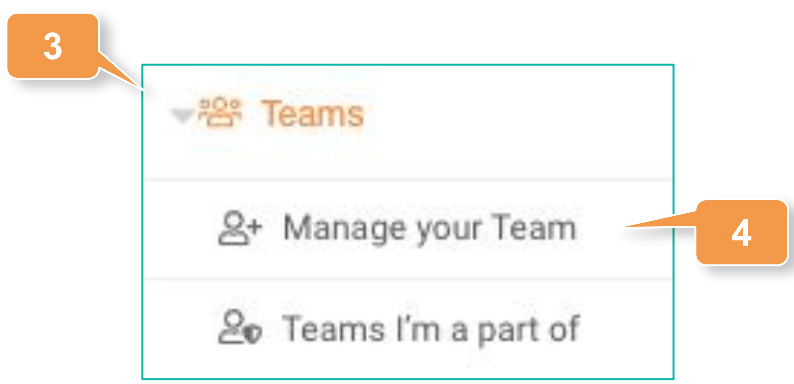
2. Click the **Start** button for the relevant area of your dashboard to open it.

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.





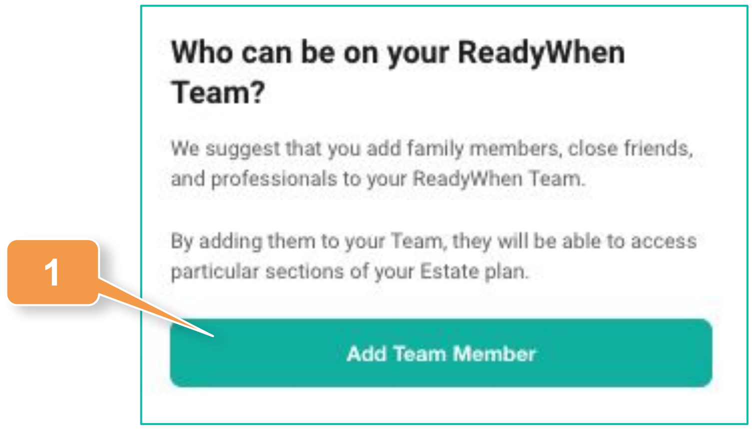


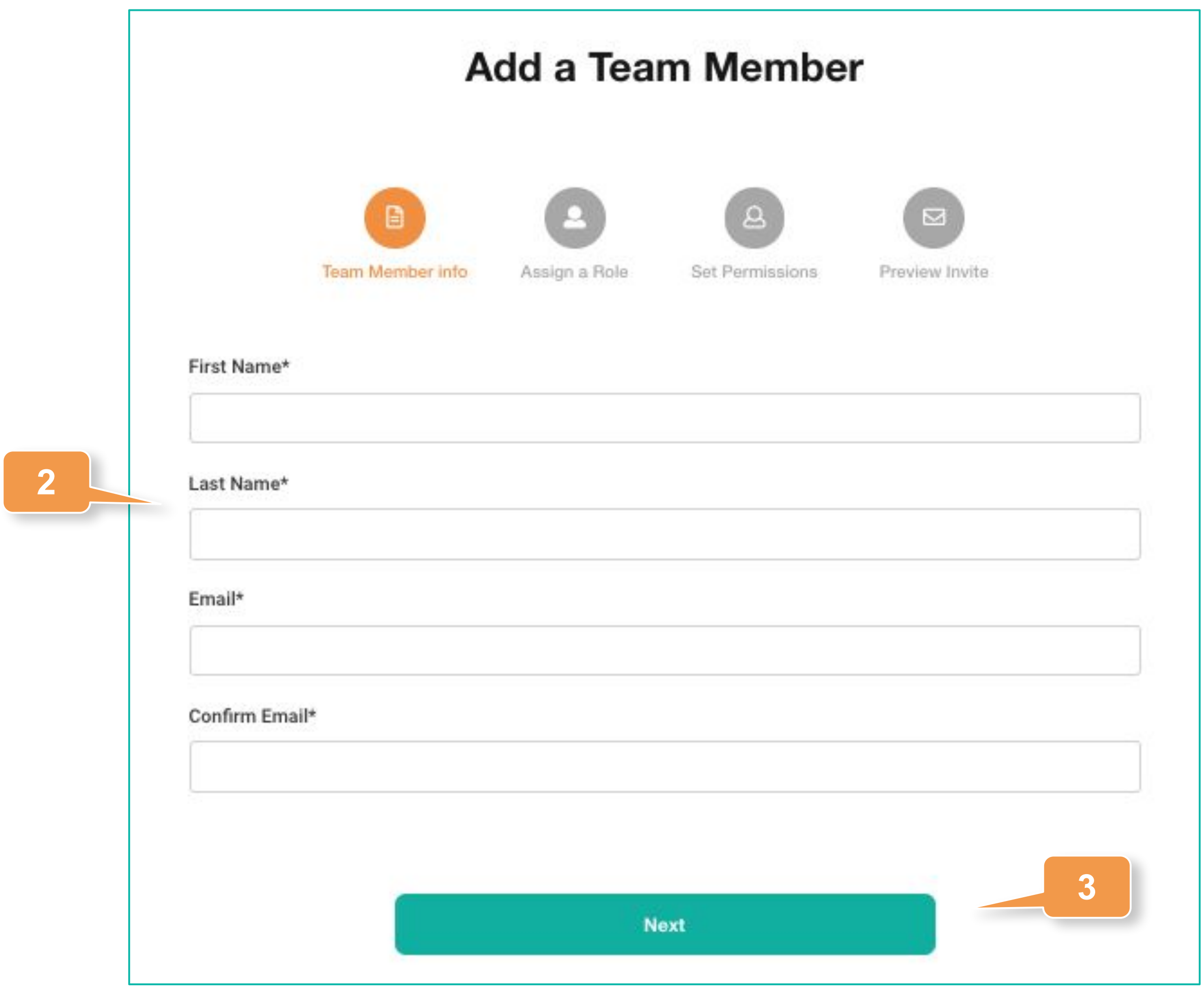
Team Member Information

1. From the Teams Overview page, click **Add Team Member**.

2. Ensure all four fields - First Name, Last Name, Email and Confirm Email - are completed.

3. Click **Next** to move to the next area.



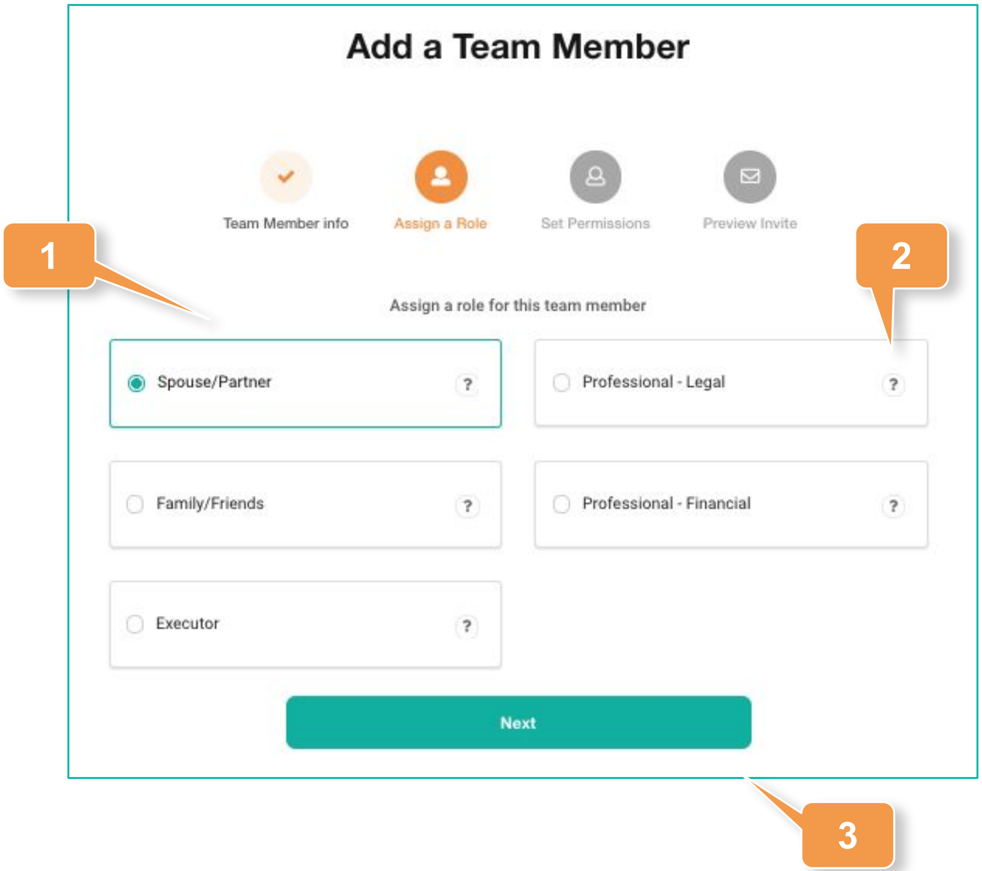


Assign a Role

1. Select the role you'd like to assign this individual.

2. Roll over the question mark beside each title for more information.

3. Click **Next** to move to the next area.



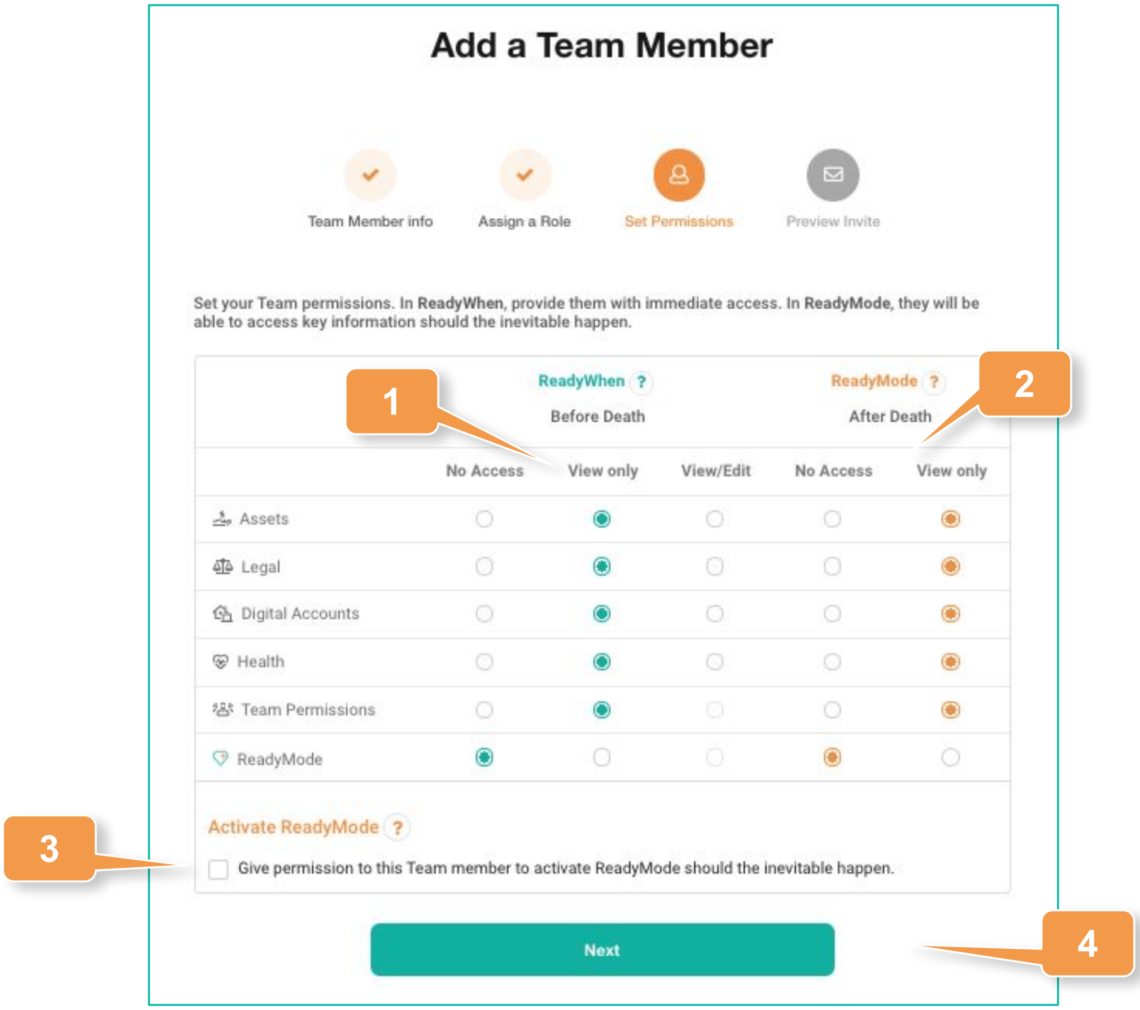
Set Permissions

1. Define before death permission levels - No Access, View only or View/Edit - for each of the ReadyWhen sections.

2. Define after death permission levels - No Access or View only - for each of the ReadyWhen sections.

3. Determine whether or not this individual is permitted to activate ReadyMode. I.e.; Secure all information so it can't be changed or edited after death occurs.

4. Click **Next** to move to the final area.

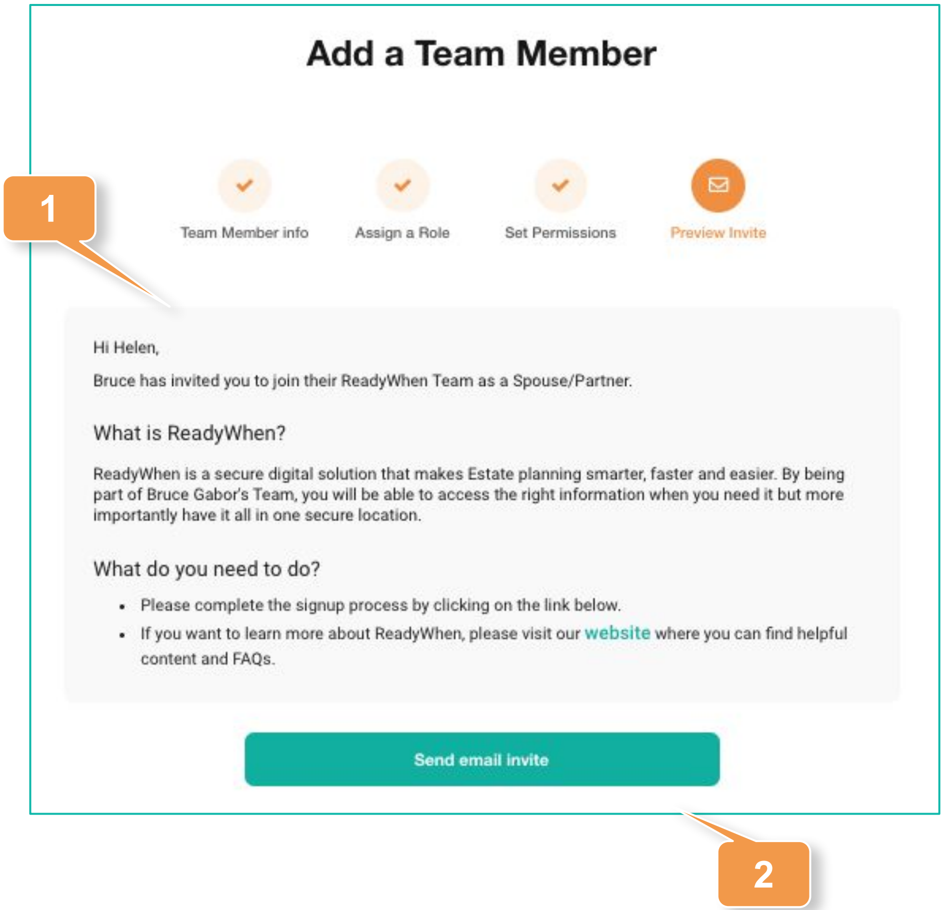


Preview Invitations

All new team members will receive an email inviting them to be part of your team.

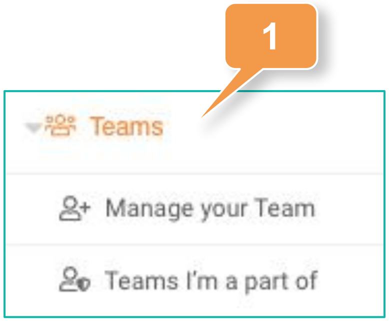
1. Review the email that will be sent to your new team member.

2. Click **Send email invite**.



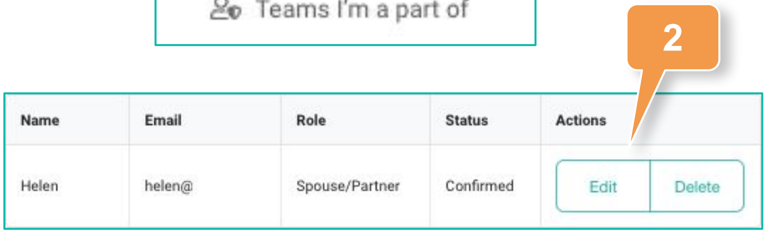
Editing or Deleting Team Member

1. Click on **Teams** in the left hand navigation



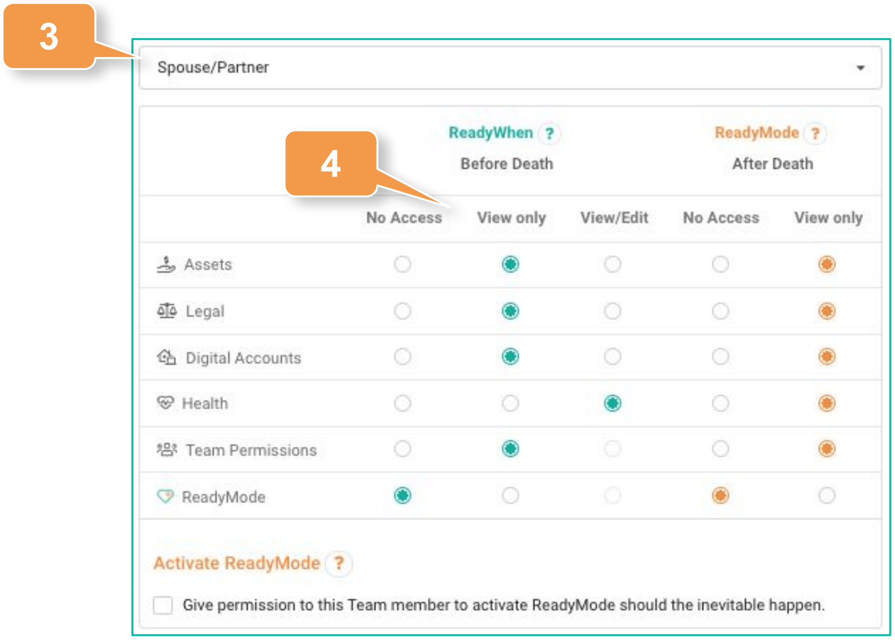
Editing

2. In the Actions area to the right of the team member's name, click **Edit**.



3. Use the dropdown to change the role of the individual. And/or,

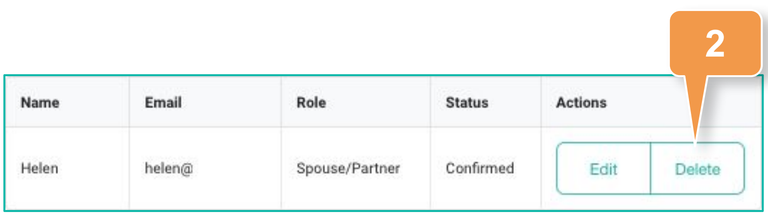
4. Select different permissions for each of the ReadyWhen sections.



5. Click **Save** to update the team member.

Deleting

2. In the Actions area to the right of the team member's name, click **Delete**.



3. Click **Confirm** to remove the team member.

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