



# QuickStart Guide

How to use: Teams

October 2021  
Version 1.0

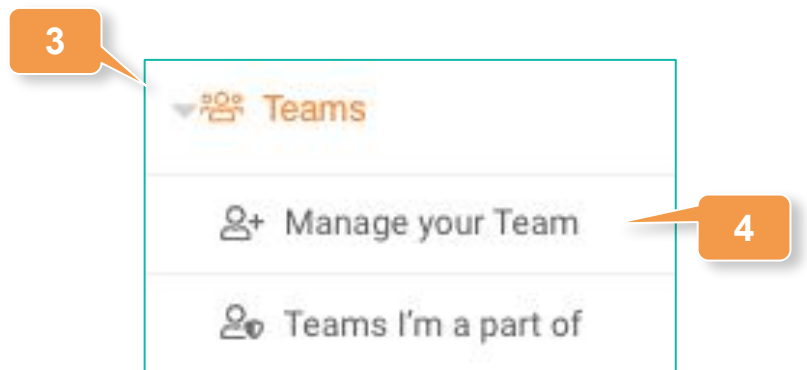
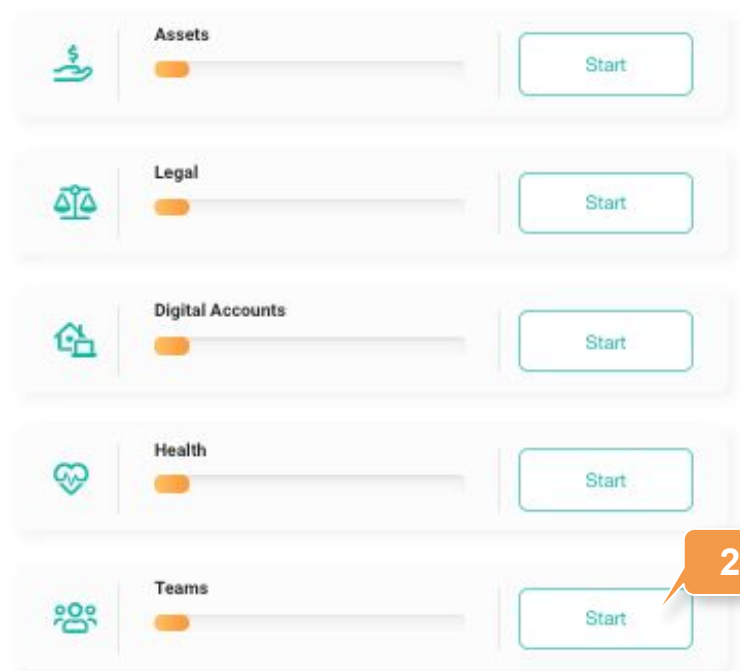
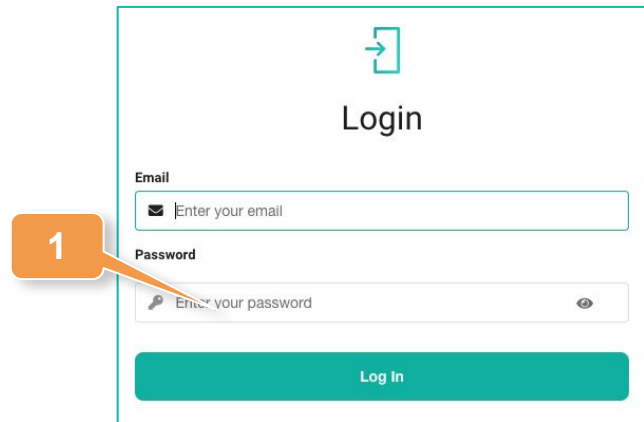


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# Logging in and Navigation

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.

**Who can be on your ReadyWhen Team?**

We suggest that you add family members, close friends, and professionals to your ReadyWhen Team.

By adding them to your Team, they will be able to access particular sections of your Estate plan.

**Add Team Member**



### Add a Team Member

**Team Member info**   Assign a Role   Set Permissions   Preview Invite

First Name\*

Last Name\*

Email\*

Confirm Email\*

**Next**



# 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.

The screenshot displays the 'Add a Team Member' workflow. At the top, four steps are shown: 'Team Member info' (checked), 'Assign a Role' (active), 'Set Permissions', and 'Preview Invite'. Below this, the instruction 'Assign a role for this team member' is followed by five role selection boxes: 'Spouse/Partner' (selected), 'Family/Friends', 'Executor', 'Professional - Legal', and 'Professional - Financial'. Each box contains a radio button and a question mark icon. A teal 'Next' button is at the bottom. Three orange callout boxes with numbers 1, 2, and 3 point to the 'Assign a Role' step, the question marks, and the 'Next' button respectively.

# 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.

**Add a Team Member**

Team Member info Assign a Role **Set Permissions** Preview Invite

Set your Team permissions. In ReadyWhen, provide them with immediate access. In ReadyMode, they will be able to access key information should the inevitable happen.

	ReadyWhen ? Before Death			ReadyMode ? After Death	
	No Access	View only	View/Edit	No Access	View only
Assets	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Legal	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Digital Accounts	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Health	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Team Permissions	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
ReadyMode	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

**Activate ReadyMode ?**

Give permission to this Team member to activate ReadyMode should the inevitable happen.

**Next**

# Preview Invitations

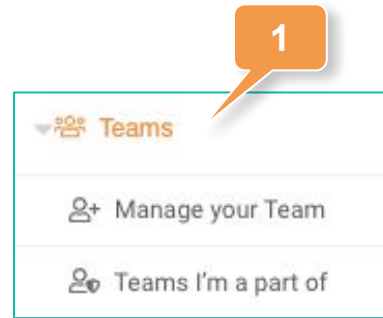
All new team members will receive an email inviting them to be part of your team.

1. Review the email that will be sent to your new team member.
2. Click **Send email invite**.

The screenshot displays the 'Add a Team Member' process with four steps: 'Team Member info', 'Assign a Role', 'Set Permissions', and 'Preview Invite'. The 'Preview Invite' step is highlighted in orange. A callout box labeled '1' points to the email preview content. The email text includes a greeting to Helen, an invitation from Bruce Gabor, a description of ReadyWhen, and instructions on how to complete the signup process. A 'Send email invite' button is located at the bottom of the preview area. A second callout box labeled '2' points to this button.

# 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**.

Name	Email	Role	Status	Actions
Helen	helen@	Spouse/Partner	Confirmed	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

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.

A screenshot of the 'Edit Team Member' form. Callout 3 points to the 'Spouse/Partner' role dropdown. Callout 4 points to the 'ReadyWhen' section, which has two columns: 'Before Death' and 'After Death'. Each column has radio buttons for 'No Access', 'View only', and 'View/Edit'. Callout 5 points to the 'Save' button at the bottom of the form.



## 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.

Name	Email	Role	Status	Actions
Helen	helen@	Spouse/Partner	Confirmed	<input type="button" value="Edit"/> <input type="button" value="Delete"/>





# Contact Support

The ReadyWhen Support Team is available to assist if needed.

Contact us at:

T: +1.855.908.5292

E: [support@readywhen.ca](mailto:support@readywhen.ca)

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