



QuickStart Guide

Getting Started

February 2022



Logging in and Onboarding

1. Login to the ReadyWhen application at: <https://app.readywhen.ca>
2. When prompted, enter the verification code sent to your mobile device.

After your first login, the Onboarding Guide will appear.

3. Select the items you would like to add to your ReadyWhen plan and click **Continue**.
4. Identify the amount of each item you would like to add and click **Continue**.
5. Click **Continue** to finish the Onboarding process.

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Navigating ReadyWhen

1. Navigate the site by clicking the drop down arrows on the left hand menu and selecting the page you'd like to visit.
2. Alternatively, click **Continue** in the appropriate area of your dashboard to go to that sections overview page.
3. Items identified during the Onboarding Guide can be accessed and completed from the **To Do** section at the top of the dashboard.
4. Use the profile area in the top right corner to **edit your account details, change your password, relaunch the onboarding tool** and/or **log out**.

The screenshot displays the ReadyWhen dashboard interface. On the left is a teal sidebar with the 'READYWHEN' logo and a navigation menu. The main content area is titled 'My Dashboard' and features a 'To-Do List - Update and complete' section with four cards: 'Property', 'Will', 'Spouse/Partner Will', and 'Social Media'. Below this is a 'My ReadyWhen' section with progress bars for 'My Plan', 'Assets', 'Legal', and 'Digital'. Each progress bar shows 0% completion and includes a 'Continue' button. A 'Help' icon and a user profile icon labeled 'BG' are in the top right corner. Four orange callout boxes with numbers 1, 2, 3, and 4 point to specific elements: 1 points to the 'Assets' menu item, 2 points to a 'Continue' button, 3 points to the 'To-Do List' header, and 4 points to the user profile icon.

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>