QUICK REFERENCE GUIDE FOR PHUNDEX – ADMIN USER

INTRODUCTION

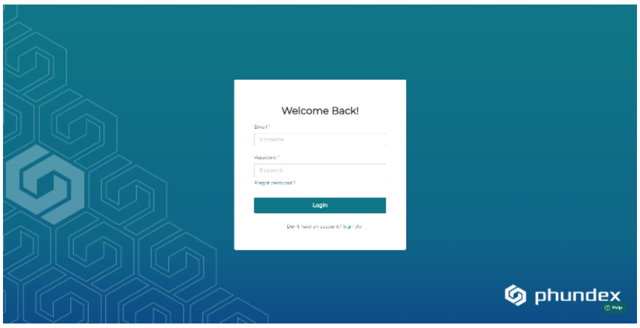
An Admin (Client) is responsible for registering their Company to Phundex. Once they register, they can add users to their Network internally from their organisation or externally to collaborate on Pathways.

They can also create and manage pathways from existing templates and can also create their own. However, this functionality will be primarily done by the Manager of a Pathway.

Key functionality:

- View dashboards – overview and pathway-specific
- Choose a subscription plan / manage this plan
- Create and manage pathways
- Assign and Edit tasks
- Create and manage Network (users)

GETTING STARTED - LOGIN



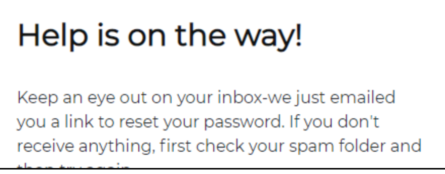
1. Enter your Email and Password and click **Login**
2. The Global Dashboard will be displayed once you have successfully logged in.

Reset Your Password

1. Click **Forgot Password** on the Login page.
2. Enter your Email on the Verify Email page and click Submit.
3. A message will be displayed confirming that a password reset email has been sent.
4. An email with a link to reset your password will be sent.

Email Sent

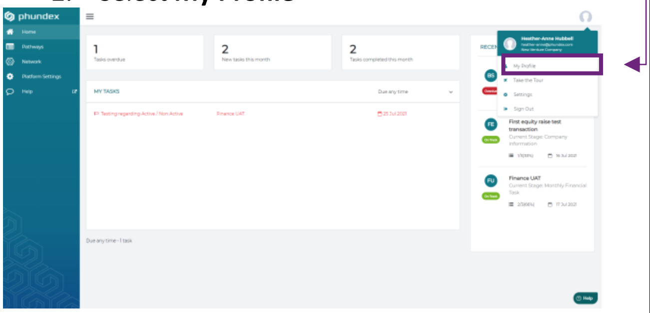
Email sent confirmation screen will display.

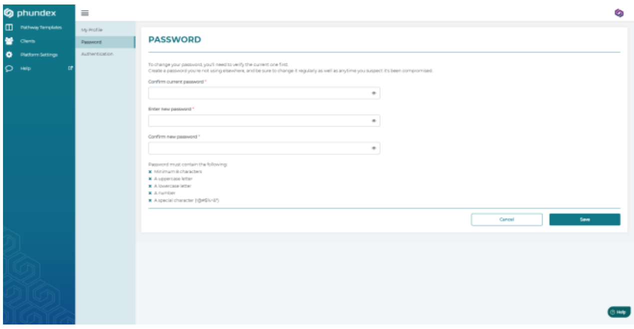


Change Password

In the Platform, you can change your password at any time:

1. Click your **profile picture**
2. Select **My Profile**





1. Select the **Password** option from the submenu
2. Fill in the 'Confirm current password.'
3. Complete 'Enter new password.'
4. Complete 'Confirm new password.'
5. Click Submit

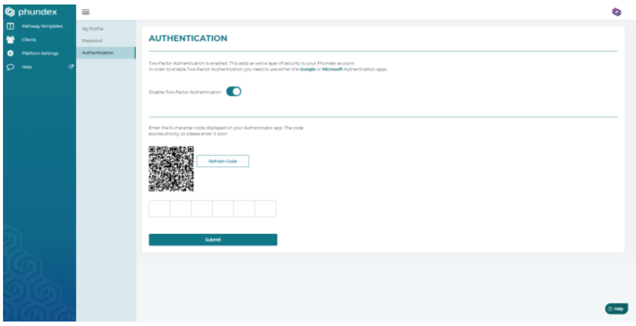
Note: an **Error Message** will appear if:

1. the 'current password' entered is not correct
2. the 'Enter new password' and 'Confirm new password fields do not match
3. the new password entered does not meet password policy, i.e.

- Must be longer than 8 characters
- Must include an uppercase character
- Must include a lowercase letter
- Must include a number
- Must include a special character
- Must not contain your username

TWO FACTOR AUTHENTICATION

The **Authentication** screen allows you to add another layer to security to your account by enabling two-factor authentication with either Google or Microsoft authenticator.

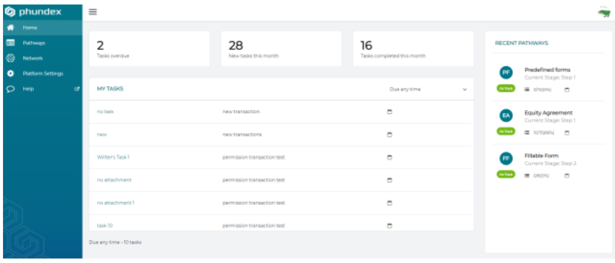


Once set up, you will be required to enter your password and your authenticator code when logging in.

VIEW DASHBOARDS

Global Dashboard

When you successfully log into the Platform, you will see the Global Dashboard.



The Global Dashboard shows you a summary overview of your tasks that are:

- Due today
- Due this week
- Due this month
- Overdue
- New this month
- Completed this month

View the number of:

- Tasks overdue
- New tasks this month
- Tasks complete this month

Additionally, you will see a summary of the three most recent pathways you have worked on so you can get a progress update at a glance.

CHANGE SUBSCRIPTION

When an Admin first registers to the Platform, you need to choose a subscription plan to continue using the Platform. You have a range of options across annual plans depending on your anticipated number of users.

When you select a plan, you will go directly through the payment process and then be returned to the Platform.

CHANGE SUBSCRIPTION

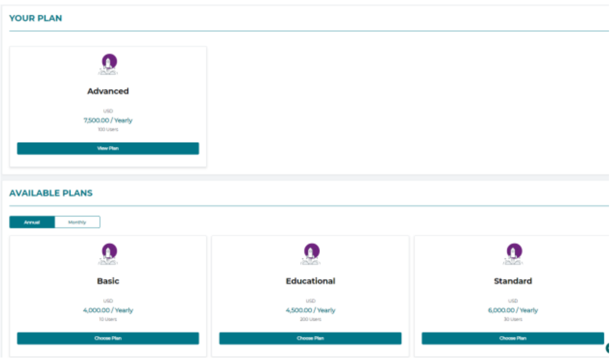
Admin users can update their chosen subscription plan at any time if the needs of your organisation change.

Update Subscription:

An Admin can update your subscription or plan. This could be when you want to increase the number of users who can access/use the Platform.

To update subscription:

1. Click Platform Settings (left-hand navigation)
2. Under Available Plans, choose a plan a click Choose Plan
3. Follow the prompts to set up the new plan.
4. Plan changes will come into effect immediately and billing will be pro-rated



Cancel Subscription:

1. Click Platform Settings (left hand navigation)
2. Under Your Plan click View Plan

Click Cancel Subscription and follow the prompts via Chargebee. Your subscription will expire at the end of your plan year.

MANAGE YOUR NETWORK

The Client Network is composed of internal and external users who can access the Pathways and specific information. Anyone with your company domain can be invited and will not require complete company verification again.

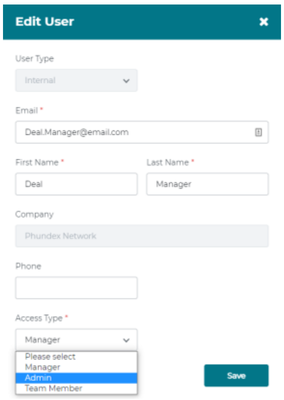
Anyone who is not part of your Company can be added as an external team member and assigned specific tasks/can view the data room within that Pathway.

The Admin user is responsible for managing a network of users and has permission to:

- Activate and deactivate users
- Update user details
- Change other user's access type

Edit a User:

1. Click Network (left-hand navigation)
2. Find the user from your Network list (use Search and filter functionality to find the user if needed)
3. Click on the three dots
4. Click Edit
5. Update details as required
6. Click Save

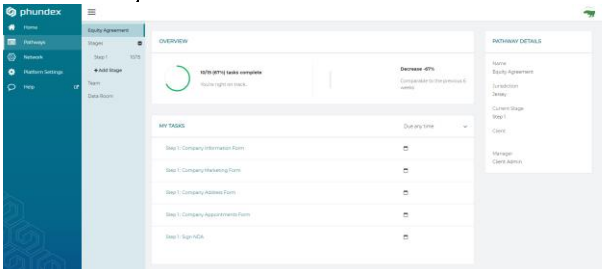


Activate / Deactivate a user:

1. Click Network (left-hand navigation)
2. Find the user from your Network list (use Search and filter functionality to find the user if needed)
3. Click on the three dots
4. Click Activate / Deactivate
5. The users Status will be updated to Active / Not Active
   - Not Active – means the user will no longer be able to access the Platform

Pathway Dashboard

When viewing a Pathway the first screen you will see is the Pathway Dashboard



The Pathway Dashboard shows you your tasks specifically relating to the Pathway, as well as a snapshot of key details and progress within the Pathway.

From here you can navigate directly to a Task by clicking on it.

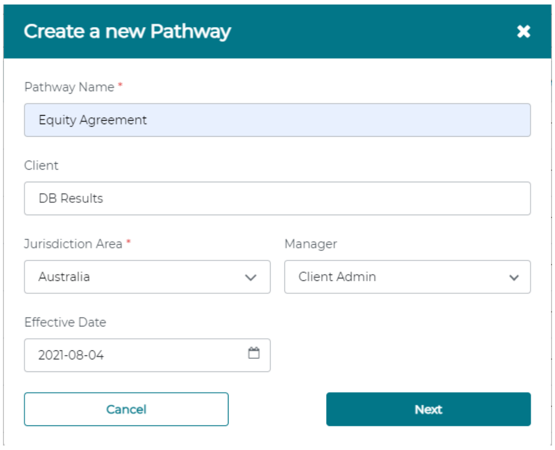
CREATE AND MANAGE PATHWAYS

Note that this functionality will primarily be the responsibly of the Manager (Pathway).

Create a New Pathway

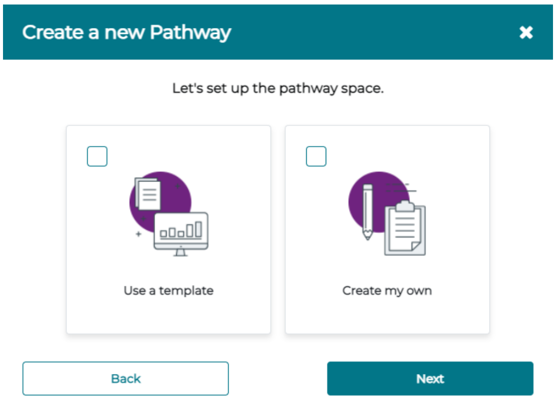
Admin users can create new Pathways to manage opportunities:

1. From any screen click on the Pathways option in the left-hand navigation panel
2. Click **Create Pathway**
3. Complete the details and click Next

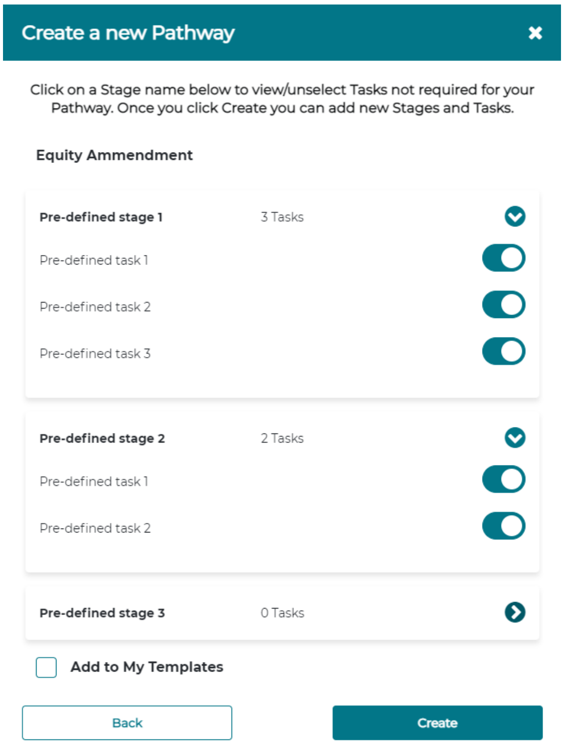


Admin users can use an existing pathway template to save time or create a custom pathway.

Note: Even when selecting a template Pathway, Admin users can customise how the Pathway is set up.

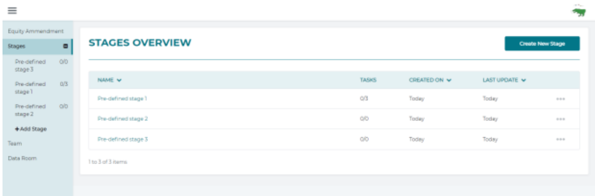


1. Once a template is selected you will view a summary of the Stages and Tasks included within the template

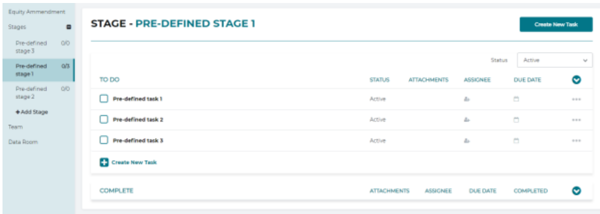


2. Remove any tasks from the template if you wish, and then click **Create**.

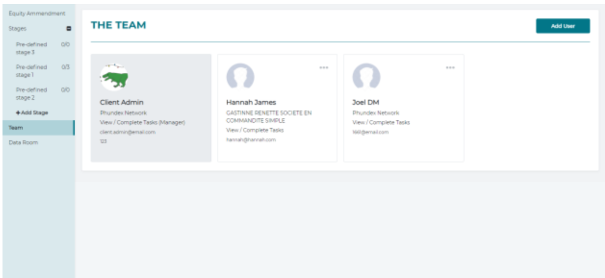
The **Stages Overview** screen will show you a summary of the Stages included in your Pathway and the number of included tasks.



- Click on the name of a Stage to see all of the Tasks included in that Stage:



Managing Your Team
Admin users can add and remove people from the Pathways team and manage each team member's permissions.



To add a team member to a Pathway:

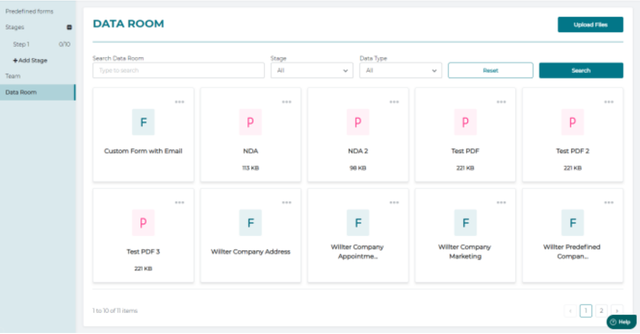
1. Go to the Pathway you want to change
2. Click on Team
3. Click Add User
4. Search for the user's email address in the dropdown selector
5. Update the users Pathway Access
6. Click Add

To remove a team member from a Pathway:

1. Go to the Pathway you want to change
2. Click on Team
3. Find the user you want to remove and click on the three dots (top right-hand corner)
4. Click Remove user and then click Yes.

View the Data Room

The Data Room within a Pathway is where all of the documents and forms relating to that Pathway are stored.



To view the Data Room:

1. Go to the Pathway
2. Click on Data Room

From within the Data Room, you can search and filter the results to find what you are looking for.

Or simply click on a file to view it.

To upload a file:

1. Go to the Pathway where you want to upload the file
2. Click on Data Room
3. Click Upload Files
4. Select a file and click Upload

Additionally, you have access to manage all files within the data room. If you click on the three dots you can:

- View file permissions
- View file audit trail
- View a list of file versions
- Download the file

Request Signatures

When viewing a PDF file, you can set up and send the file for electronic/digital signing.

1. Go to the Pathway where the file you want signed is stored
2. Click on the file name (PDF files only)
3. Click on Request Signatures
4. If you don't have a *eversign* account, you can set up on for free – otherwise click Send to *eversign*.
5. This will launch *eversign*, allowing you to click-and-drag signature fields into the document and send for signature.

ASSIGN & EDIT TASKS

Admin users can assign tasks to people within a Pathway team and also edit the details of those tasks.

Assign a Task

1. Go to the Pathway where you want to assign the task
2. Click Create New Task
3. Give the Task a Name and Description
4. Select a Due Date for the task (or leave blank if unknown)
5. Click Assigned To and select a member of the Pathway Team to assign the Task to
6. Click Next
7. Attach documents or forms if required
8. Click Save