



**WAY2B1**

Simplify the complex life

## 2020 Platform Features

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San Francisco, California



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## Source

- Activity Feed across the platform shows updates and edits
- Queue of items awaiting attention across the platform
- The Guide: Summary statistics of activity on the platform over a given period
- Search within pages, documents and emails on Source
- Search across the platform
- Create domains to group similarly themed capsules
- Create capsules (or pages) to serve as the store of related info
- Share domains and pages with other users on the platform for collaboration
- Customize each capsule to best reflect the pertinent information by utilizing the available widgets:
  - Specs: A table that allows for the display of appropriate details
  - Documents: A document storage space specifically for each capsule
  - Notes: A flexible text editor allows for the capture of text for context
  - Emails: Display relevant emails that have been sent into the system
  - Checklist: Create a checklist to track open items
  - Links: Reference other relevant Source pages
  - Fixit: Reference relevant Fixit tasks
  - Greenlight: Reference relevant Greenlight requests
  - Clock: Display multiple clocks from multiple time zones to provide context
  - Contacts: Create a contact list of those people relevant to the topic
  - Overview: A designable space that allows you to organize and display a collection of the other widgets
  - Custom: An additional customizable space, similar to the overview, to provide added design flexibility

- Carry on the conversation within the context of the capsule by leaving comments and mentioning fellow collaborators
- Review all edits and changes to a capsule from the History tab
- Send emails directly into Source to be saved within a capsule
- Approve emails submitted into Source to be saved within a capsule
- Request documents be added by a third party, directly from the appropriate capsule
- Approve documents submitted by third parties for storage within a capsule
- Manage personal notifications for events within the platform
- User receives an email summary of the their queue
- React to comments with emojis
- Admins can now control other users' notification preferences
- File uploads are scanned through anti virus check
- Encrypt all data fields on the platform
  - Devices need to be approved before they can see encrypted information
- Help Center with user guides and FAQs

## Greenlight

- Personalized queue of requests awaiting your attention in Greenlight
  - Items are actionable from the queue, however, users can also click on an individual request in the queue to see more detail and action it from there
- Create, edit, approve, decline and void spending requests, change orders, accounting items (invoices, checks, expenses, credits)
- Dedicated template for investment decisions in Greenlight
- Have a conversation within the context of the capsule by leaving relevant comments in the sidebar

- Comments can be edited, and changes to comments are captured in the capsule's history tab (detailing the 'before' and 'after' of each change)
- Upload attachments and supporting documents to help support the case for why the decider(s) should approve your request
  - Attachments can be deleted, and uploading/deleting attachments to a capsule is captured in that request's history log
- Review all edits and changes to a Greenlight request, since its inception, from that capsule's immutable history log
- Apply customizable approval processes to Greenlight items based on request type (expenditure, invoice, travel, investment, philanthropy, etc.), legal entity and amount
- Add users to a Greenlight request for awareness or to collaborate on "building out the argument" for the request
- Approve, decline or mark a request as 'needs work'
  - Bulk approve or decline of requests
- View all Greenlight items you are permitted to see in the table view
  - Sort, search and filter Greenlight items from the table view
  - Customize the columns displayed/hidden in your table view, as well as the order in which they appear
- Accounting items related to a request that has already been approved can be uploaded and linked directly to that request
  - This creates a graphical view of amount spent to date against that request, and captures all accounting items/change orders
  - Mark accounting items as "Paid"
  - Bulk upload invoices to a request and let Greenlight extract information from invoice automatically
- Export data as .csv
- Manage personal notifications for events within Greenlight

## FixIt

- Track the status of a maintenance task from creation until verification
- Create a new maintenance task, and delete or edit a maintenance task
- Have a conversation by adding a new comment to a maintenance task, as well as deleting or editing a comment
- Create a repeating schedule of tasks for preventative maintenance
- Upload a new document like a picture or blueprint to a maintenance task and delete a document
- Update the status of a maintenance task
- Search for any maintenance task
- Create a new maintenance task by sending an email to FixIt
- Create a new maintenance task by sending a text message to FixIt
- Link Greenlight items and FixIt items together
- Export a list of maintenance tasks in .csv format
- Add a checklist to a maintenance task
- Permission maintenance tasks to individual users and teams on a need-to-know basis