

Skyjed Connect: Quick Steps to Get Started


INVITE A PARTNER

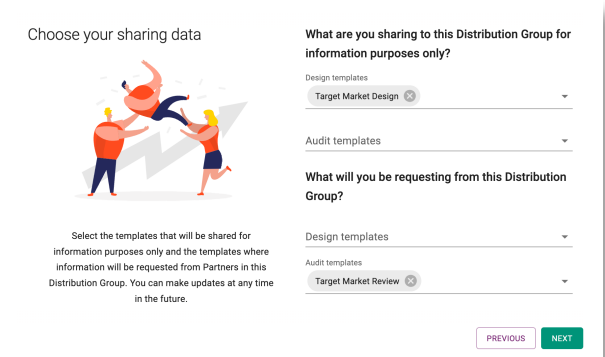
Welcome to Skyjed Connect! Thanks for joining as a **SKYJED CONNECT PREMIUM ADMINISTRATOR**.

Skyjed Connect enables the sharing and collection of important product information between Partner organisations. We'll help you set up Connect in your organisations' Skyjed account so that you can easily connect with Partners and help your organisation to start using Skyjed Connect. View our tips on page 2 to set up for success. **Let's get you started!**

1 SET UP INFORMATION SHARING

In the **PURPLE SIDE BAR**, select **SETTINGS > CONNECT > DISTRIBUTION GROUPS** to **ADD A GROUP**. Follow the prompts, add **PRODUCT(S)**, and select the **TEMPLATE(S)** that contain the information you want to share or request from the group. Add **PARTNER(S)** or skip for now, then **CREATE DISTRIBUTION GROUP**.

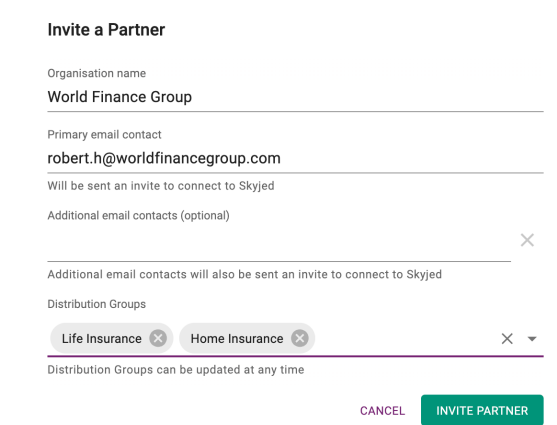
Select **VIEW YOUR GROUPS** for a summary and click on the meatball menu  for further information. Move on to **INVITE A PARTNER**.



2 INVITE A PARTNER

Under **CONNECT**, select **PARTNERS** to **INVITE A PARTNER**. Follow the prompts and include the **DISTRIBUTION GROUP(S)** you want to add them to. Once you invite your **PARTNER**, their **CONNECT STATUS** will show as **PENDING AUTHORISATION**.

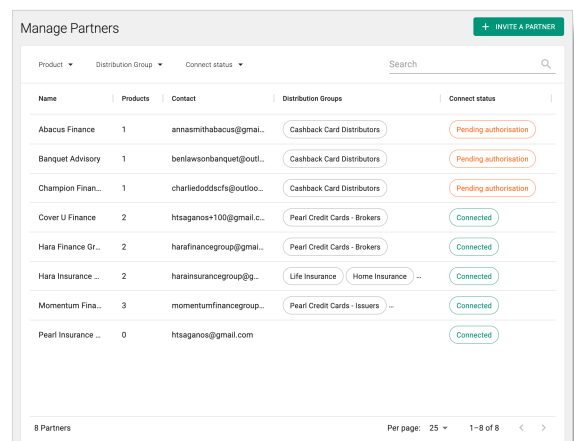
When the **PARTNER** accepts the invitation, their **CONNECT STATUS** will update to **CONNECTED**, or you will be notified if they do not connect within 2 weeks.



3 ON-GOING MANAGEMENT

As an Admin, you will be responsible for keeping the details for **PARTNERS** and **DISTRIBUTION GROUPS** up-to-date. This ensures the right product information can be shared with, and collected from, the right people.

Look out for Skyjed **NOTIFICATIONS!** These will help you stay on top of ongoing management actions such as resending expired connection invites.



Name	Products	Contact	Distribution Groups	Connect status
Abacus Finance	1	annasmithabacus@gmail...	Cashback Card Distributors	Pending authorisation
Banquet Advisory	1	benlawsonbanquet@outl...	Cashback Card Distributors	Pending authorisation
Champion Finan...	1	charliedoddscfs@outlo...	Cashback Card Distributors	Pending authorisation
Cover U Finance	2	htsaganos+100@gmail.e...	Pearl Credit Cards - Brokers	Connected
Hara Finance Gr...	2	harafinancegroup@gmai...	Pearl Credit Cards - Brokers	Connected
Hara Insurance ...	2	harainsurancegroup@g...	Life Insurance Home Insurance	Connected
Momentum Fina...	3	momentumfinancegroup...	Pearl Credit Cards - Issuers	Connected
Pearl Insurance ...	0	htsaganos@gmail.com		Connected

If you have any questions, please contact us at support@skyjed.com or search our **Knowledge Centre**.

TIPS TO SET-UP FOR SUCCESS WITH SKYJED CONNECT

WORK WITH PRODUCT OWNERS

Ensure you communicate with Product Owners to understand products allocations to Distributor Groups and associated templates to be used.

Once Partners are set up in Skyjed, Product Owners will be able to check which Partners and Distribution Groups are connected to the products they own by clicking on the Product > Manage > Partners.

Product Owners will receive an email and in-app notification when a product they own is added to a Distribution Group, confirming that they can now start sharing and requesting information from Partners.



GET PARTNERS READY

Collate the details of your Partners and key contacts.

Notify them about Skyjed Connect and next steps. If you are unsure, clarify who will be their designated Skyjed Administrator.

Only Admin roles can manage Skyjed Connect settings in Skyjed. This includes setting up and managing Partners and Distribution Groups or Audit. An Event from a Partner that requires response is labelled as a Design or Audit Request.



DISTRIBUTION GROUPS

Sort Distributors by Product offering, Region, or other parameters, then group them into Distribution Groups and name each Group.

Determine which product design and/or audit templates are required **to be shared for information purposes to the Distribution Group.**

Determine which product design and/or audit templates require Partners **to provide information or data back to you.**

If you are unsure of which Templates should be select, contact the Product Owner(s).



ON-GOING SUCCESS

Look out for Skyjed notifications. Using these will help to define how to keep connected to Partners and Product Owners so that both teams can share and receive information on time.

Use the settings functions in the purple side bar to review a concise list of Partners and Distribution Groups.

