

# Plexus User Guide

[Customer] is using Plexus!

We've started using Plexus to simplify contract management and legal matter management across our organisation. From Plexus, you can expect:

- A structured process for all things contract management and contract storage
- Approval and signing logic for our Delegation of Authority
- Digital contract signing
- Automated notifications to help with key contract dates
- Contract and matter reporting
- An audit trail on all contract related activity
- Centralised Requests: All legal support requests are managed in one place for easier tracking and management.

First time using the platform? Here's a handy guide we've pre-prepared to assist you through the steps.

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# Getting Started


In order to start using Plexus, you'll first need to set up your account.

## Access by Single Sign On

Once we've enabled Single Sign On, you'll be able to log in using your regular email address and password used at work and across other websites. Enter your work address and follow the prompts. Where you did not previously have a Plexus account, one will be created for you upon filling in your work email and details.

Once logged in, you'll have a range of prompts to enter your first and last name. You'll need to read and accept the Plexus Terms and Conditions of use. Plexus will also ask you to answer a few questions, such as your department and reason for using the platform.

Example below – Single Sign on enabled. Simply enter your work email address at [this Plexus login page](#) to continue to the Plexus dashboard.



### Log in

Single sign on enabled

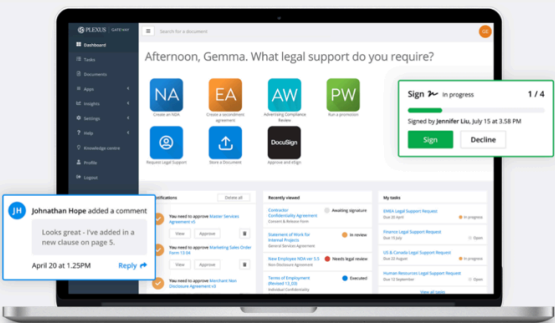
eden.deluca@plxs.com.au

Log in


Not a customer? [Try for free](#)

## Plexus: Freeing your people from administrative work.

By automating your administrative legal processes, Plexus reduces admin, improves compliances, accelerates execution and frees everyone up to focus on the important stuff.

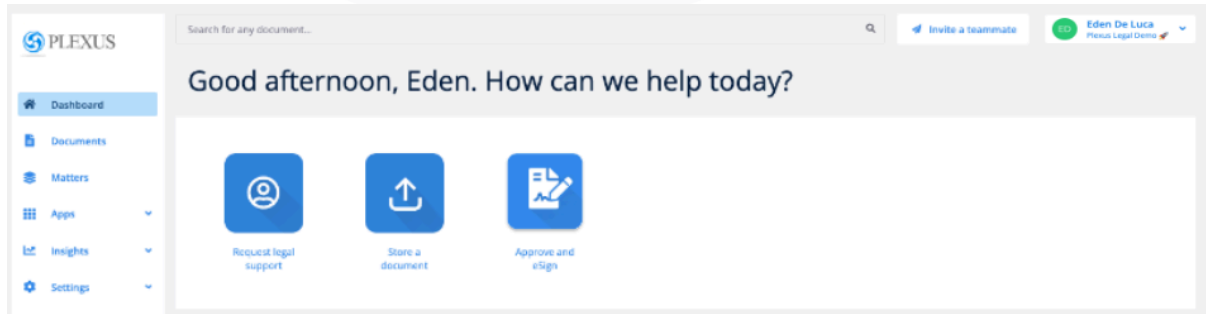


Learn more



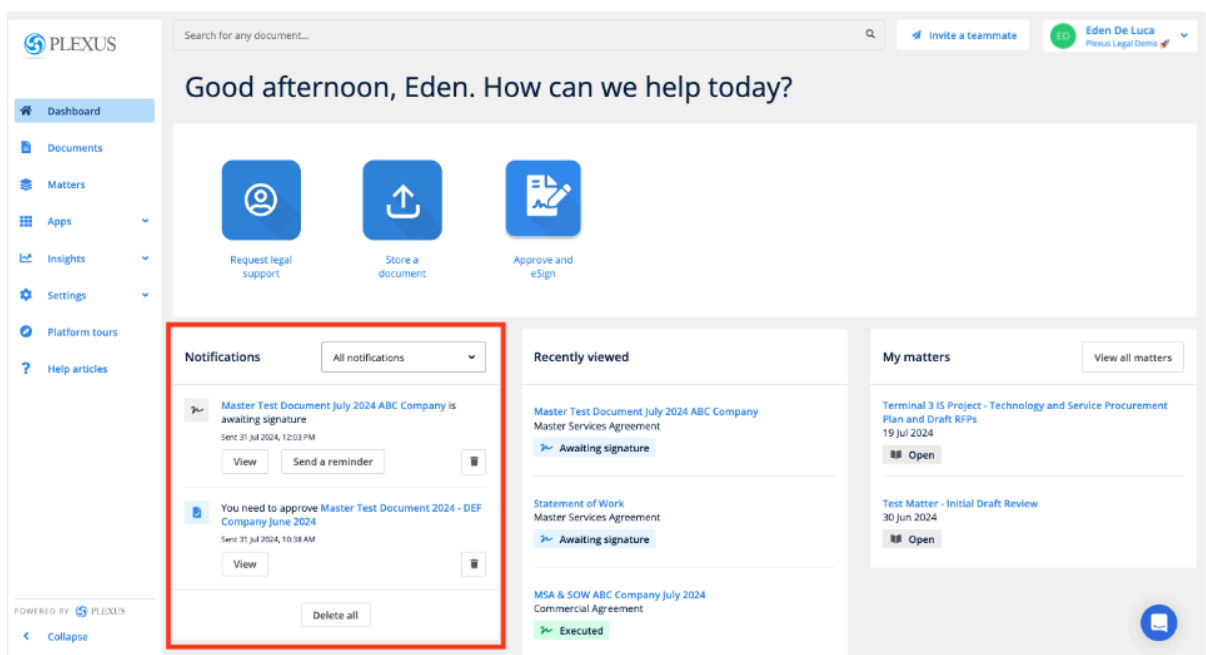
# The Dashboard

Access all of our Plexus applications and more from the Dashboard.

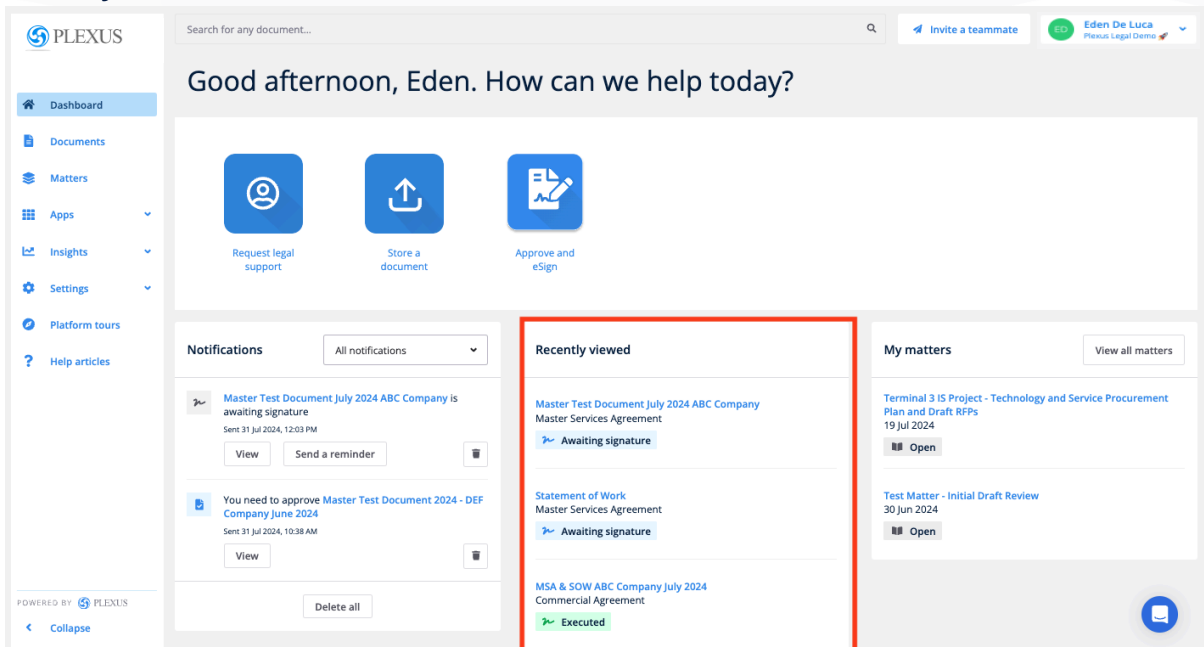


## Notifications

You'll receive all notifications via your email when there's something for you to action in Plexus. A copy of these notifications are also found on the Dashboard.



## Recently Viewed

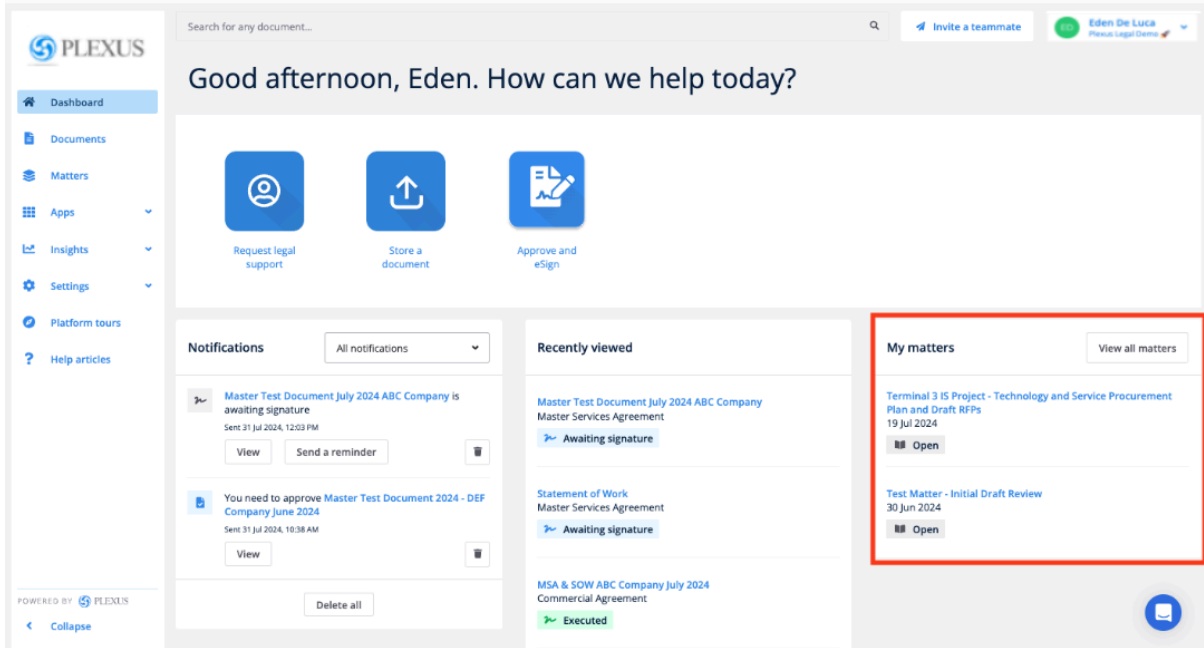


The screenshot displays the Plexus dashboard interface. On the left is a sidebar with navigation links: Dashboard, Documents, Matters, Apps, Insights, Settings, Platform tours, and Help articles. The main content area features a search bar, a greeting for 'Eden De Luca', and three primary action buttons: 'Request legal support', 'Store a document', and 'Approve and eSign'. Below these are three panels: 'Notifications' with two alerts about document signatures and approvals; 'Recently viewed' (highlighted with a red border) showing a list of documents like 'Master Test Document July 2024 ABC Company' and 'Statement of Work Master Services Agreement'; and 'My matters' with items like 'Terminal 3 IS Project' and 'Test Matter - Initial Draft Review'. A 'Delete all' button is located at the bottom of the notifications panel.

If you recently clicked into a document, the direct link to that file will show on the Dashboard too.

## My Matters

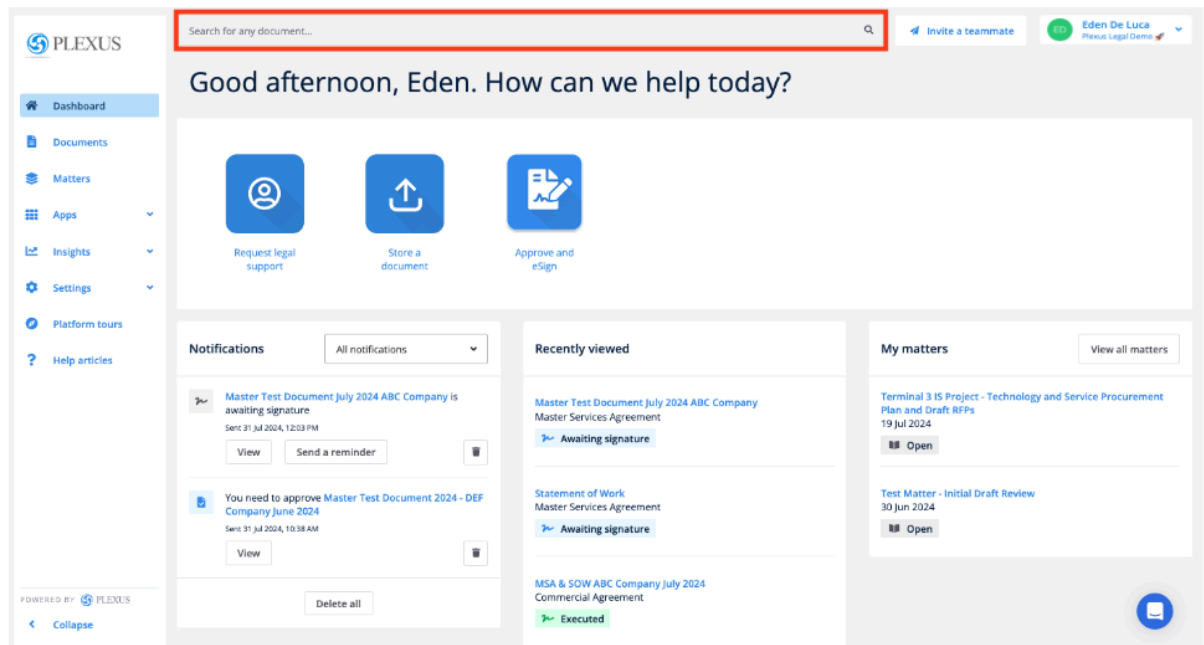
All Matters that you've recently submitted to the legal team to review will show here with a brief status update.



The screenshot shows the Plexus dashboard interface. At the top, there is a search bar labeled "Search for any document..." and a user profile for "Eden De Luca". Below the search bar, a greeting says "Good afternoon, Eden. How can we help today?". The dashboard is divided into several sections: "Request legal support", "Store a document", and "Approve and eSign". On the left, there is a sidebar with navigation links: Dashboard, Documents, Matters, Apps, Insights, Settings, Platform tours, and Help articles. The main content area includes a "Notifications" section with two items: "Master Test Document July 2024 ABC Company is awaiting signature" and "You need to approve Master Test Document 2024 - DEF Company June 2024". There is also a "Recently viewed" section with three items: "Master Test Document July 2024 ABC Company Master Services Agreement", "Statement of Work Master Services Agreement", and "MSA & SOW ABC Company July 2024 Commercial Agreement". The "My matters" section is highlighted with a red box and contains two items: "Terminal 3 IS Project - Technology and Service Procurement Plan and Draft RFPs" and "Test Matter - Initial Draft Review".

## Search bar

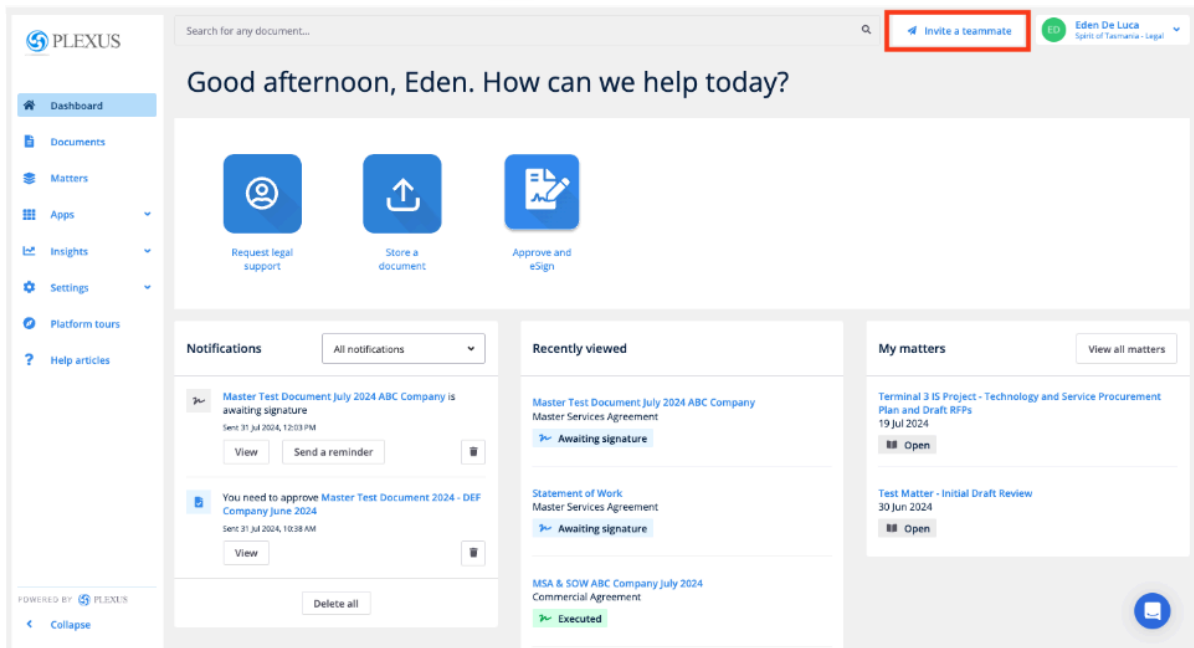
Search through all your available documents at the top of the screen.



This screenshot is identical to the one above, showing the Plexus dashboard. The search bar at the top, labeled "Search for any document...", is highlighted with a red box to emphasize its location and function.

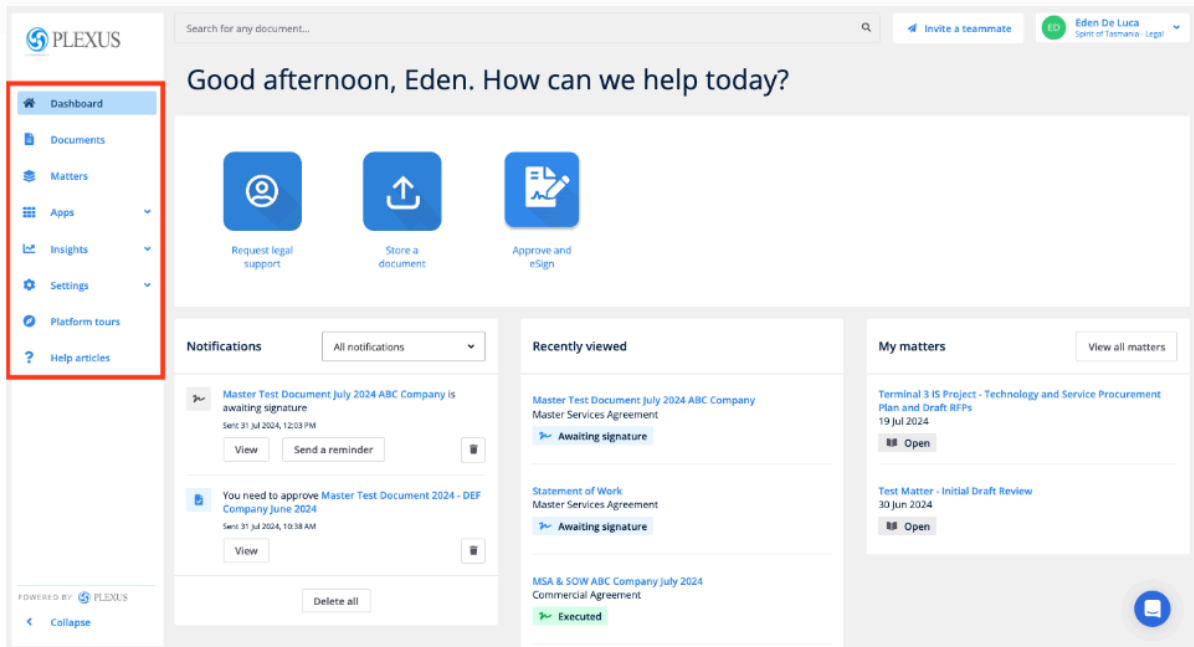
## Invite a Teammate

Invite your team members to collaborate with you in Plexus from the top right hand corner of your screen!



## The Main Menu

Access all key areas of Plexus from your main menu.



## Documents List

From the **Documents** menu, you can view all documents that you have uploaded in Plexus. Any documents shared with you for viewing, approval and/or signing will also show in this list.

General users will only be able to view the documents they uploaded into the platform. Teams may have super users (usually managers or lawyers) who will be able to access all documents for their business unit.

## Matters List

From your **Matters** list, you'll be able to see all matters created by the Request Legal Support application tile.

## Platform Tours

Access quick platform tours to help you find your bearings in the tool.

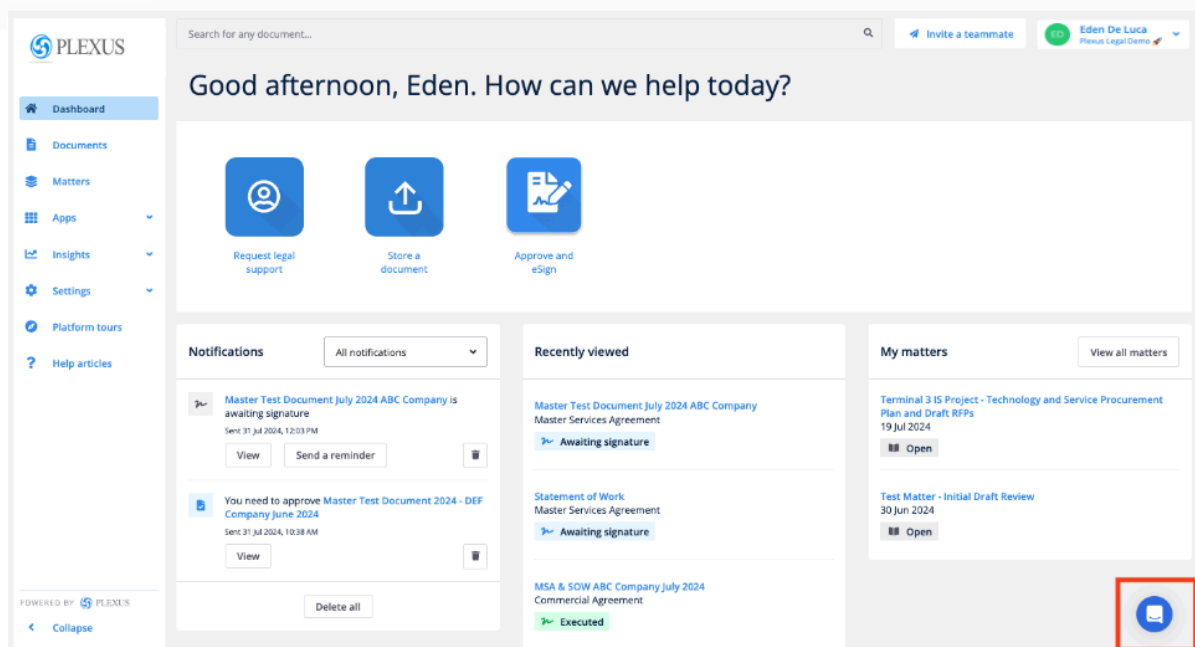
## Help Articles

Find the answers to your questions using Plexus-generated help content online.

## Chat

Use the chat tool in the bottom right-hand corner of the screen to speak directly with Plexus support.





## Uploading a Document for Storage

Store legacy documents in Plexus by using the Store a Document tile. Any existing documentation signed outside of Plexus can be stored via this app for future use! If you're looking to create a workflow with legal review, approval and signing, skip to the next section for more detail.

### Step 1

Click on the **Store a Document** tile on the Dashboard.



Store a  
document

### Step 2

Upload your file into the system by clicking **Browse**. You'll notice a dropdown to add both a Main and supporting documentation as either a **Sub-document** or **Internal document** attachment type.

- Note that any file that you upload in a 'Sub-Document' format will be visible by all parties including external counterparties upon sharing. If you're after a way to upload documentation that will be internally facing only, use the attachment type 'Internal document'

## Store a document

Last saved at 31 July 2024, 5:33 pm

[Start a new submission](#)

### 1 Document details

Upload the main document and any sub-documents to your workflow

What files would you like to upload?

Browse

Files should be smaller than 100MB

 Master Test Document.docx

Attachment type

Main document



 Statement of Work.docx

Attachment type

Sub-document



 Contract Summary Sheet.docx

Attachment type

Internal document



### Step 3

Enter all key details about your contract including:

- Document title
- Document type
- Has the document been executed (if yes, enter a date)
- Start and end dates

- Document value and currency
- Owner - someone who you're uploading the document for & who requires visibility over your work
- Is another party involved/ Counterparty details - this is where you enter the supplier and contact details. Fill this out where you can as it will strengthen our reporting!


You'll notice that we may have included specific questions based on the type of document you are uploading.

Be sure to add as much information as possible as this will assist you with finding your document later.

What type of document is this?  
Agency Agreement

Has this document been executed?  
☒ Yes ☐ No

Does this document have a start or expiry date?  
☒ Yes ☐ No

Currency  What is the document value?  It is important to enter the document value as this will impact the delegated signing authority


Optional Optional

Is this related to IT or software involved in this contract?  
☒ Yes ☐ No

Is a modern slavery questionnaire required to be completed?  
☒ Yes ☐ No

Is there an IT security form required to be completed?  
☒ Yes ☐ No

Are you uploading this document on behalf of someone else?  
You can include another stakeholder who will get access to the document and its notifications  
☒ Yes ☐ No

Is another party involved?  
Search and report on the counterparty information entered here  Use this field to input your counterparty details for reporting purposes


☒ Yes ☐ No

#### Step 4

Add document reminders if you'd like to be notified, either before the nominated expiry date, or on a specific date.


## 2 Document alerts

Include document alerts to schedule optional notifications for your file.


**Alert: Sent on specific date** 


Email subject

Email body

Send date 

**Recipients**

Email 

Name 

[+ Add another recipient](#) [+ Add myself](#)

[+ Add another alert](#)

[Back](#) [Submit](#)

## Step 5

Click **Submit** to finish loading your document into Plexus!

Uploading legacy documents into the platform is just that easy! If you're interested in creating documents with approval and signing workflows, read on for more information on the Approve and eSign app.

# Uploading a Document with Review, Approval and Signing Workflows

We've made it super easy to have documents uploaded for expedited legal review, approval and signing, and we've taken a lot of the guesswork away from you when deciding who exactly across the organisation needs to see and action a file! Better yet, all documents that run through a Plexus workflow will be stored alongside the legacy contracts uploaded via the previous section, creating a single source of truth for our contracts!

## Step 1

Click on the **Approve and eSign** tile on the Dashboard. This is where you'll upload all documents to have items reviewed, approved and signed by internal and external counterparties!



Approve and  
eSign

## Step 2

Upload your file into the system by clicking **Browse**. You'll notice a dropdown to add both a Main and supporting documentation as either a **Sub-document** or **Internal document** attachment type.

- Note that any file that you upload in a 'Sub-Document' format will be visible by all parties including external counterparties upon sharing. If you're after a way to upload documentation that will be internally facing only, use the attachment type 'Internal document'

## Approve and eSign

Last saved at 05 August 2024, 10:09 am

[Start a new submission](#)

### 1 Document details

Upload the main document and any sub-documents to your workflow

What files would you like to upload?

[Browse](#)

Files should be smaller than 35MB

 [Contract Summary Sheet.docx](#)

Attachment type  
Internal document



 [Statement of Work.docx](#)

Attachment type  
Sub-document



 [Master Test Document.docx](#)

Attachment type  
Main document



### Step 3

As per the previous section, you'll need to enter all key details about your contract including:

- Document title
- Document type
- Start and end dates

You'll notice that we may have included specific questions based on the type of document you are uploading.

Be sure to add as much information as possible as this will assist you with finding your document later! In the Approve and eSign app, the details you fill in here will also influence your document's workflow and delegation of authority.

Is this related to IT or software involved in this contract?

☒ Yes

☐ No

Is this an agreement with a potential conflict of interest?

For example is the counterparty a company that an employee has an interest in or a close personal relationship with?

☒ Yes

☐ No

If yes, please disclose the nature of the relationship.

Optional

Is a modern slavery questionnaire required to be completed?

☒ Yes

☐ No

Is there an IT security form required to be completed?

☒ Yes

☐ No

A few additional fields to keep your eye on are:

- Document value and currency - filling this out will strengthen our reporting!

<small>Currency</small> AUD	<small>What is the document value?</small> 50,000
<small>Optional</small>	<small>Optional</small>

- Owner - someone who you're uploading the document for & who requires visibility over your work

Are you uploading this document on behalf of someone else?  
You can include another stakeholder who will get access to the document and its notifications.

☒ Yes ☐ No

Owner of the document

Email	Name
-------	------

- Counterparty - this is where you enter the supplier and contact details. Fill this out where you can as it will strengthen our reporting!

Is another party involved?  
Search and report on the counterparty information entered here.

☒ Yes ☐ No

Company name

Contact name	Contact email address
--------------	-----------------------

Optional

Optional

[+ Add party](#)

- Receive a copy of the final signed agreement - if yes, enter the email of all individuals who need to receive the copy of the signed file.

Do you want to send a copy of the final signed document to anyone?

☒ Yes ☐ No

Send document to

Email	Name
-------	------

[+ Add user](#)

A copy of the final signed document can be sent to an internal Plexus user or external recipient.

As the document author, you will automatically receive a final signed copy by email when the document has been fully executed. A final signed copy will also be saved in the system, accessible to all internal users (i.e. approvers and signers) who were part of the document workflow.

### Step 3A - Templated Workflows TO BE COMPLETED ONCE DOA ADDED

Based on the information entered in Step 2, the legal reviewer, approver(s) and person(s) authorised to sign the document will be allocated to the document's workflow.



You may add additional approvers and signers to the list where required, or you may keep the template as it is. Note that you won't be able to *remove* any templated approvers based on what we've set up for you.

### Step 3B - Non-Templated Workflows

If you find that these fields are empty, you'll be able to template your own approvers and signers in this section.

#### Approve and eSign

Last saved at 12 September 2024, 1:04 pm [Start a new submission](#)

##### ✓ Document details

##### 2 Document workflow

Define the document's workflow  
This workflow may be pre-filled by your organisation's delegation of authority

✓ I want it to be reviewed ⓘ

[Add message](#)

✓ I want it to be approved by ⓘ

##### Round 1

✦ Email:   Name:  ⓘ

[+ Add approver](#)

[+ Add approver to round](#)

[Delete round](#)

+  ⓘ

[Back](#) [Next](#)

ⓘ Document alerts



Click on the buttons to **review**, **approve** or **sign** to activate each. Once activated, the section will show in blue.

- If you select the **review** stage, the document will be sent to the legal team by default;
- If you select the **approve** stage, type in the email address of an internal or external approver. You can add as many approvers as you wish at this stage;
- If you select the **sign** stage, type in the email address of an internal or external signer. You can add as many signers as you wish at this stage.

Click **Next** once you're done!

## Step 4


Click if you would like to **Add signature locations**. Drag and drop the placeholders into the correct spot(s) on the document.

### Approve and eSign

Last saved at 05 August 2024, 10:17 am [Start a new submission](#)

[I want to add signature locations](#) [Add later](#)


**Location tags**  
Drag the tags to your location and use the base for alignment.

**1st Signer**   
Eden De Luca

- Signature
- Initials
- Date
- Full name
- First name
- Last name
- Title
- Email
- Company
- Text box

Master Test Document.docx (plus 1 supporting document) Tags 0 of 1



Master Test Document.docx 3 of 3



#### 13. SIGNATURES

Plexus Pty Ltd

By signing below, I \_\_\_\_\_ hereby acknowledge that I have completely read and fully understand the Terms and Conditions listed in this document.

Signed:  

Date: \_\_\_\_\_

Company XYZ

By signing below, I \_\_\_\_\_ hereby acknowledge that I have completely read and fully understand the Terms and Conditions listed in this document.

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

You will need to complete this for each signer that's been templated on your workflow.

## Step 5

Add document reminders if you'd like to be notified, either before the nominated expiry date, or on a specific date.

### Approve and eSign

Last saved at 05 August 2024, 10:33 am [Start a new submission](#)

- ✓ Document details
- ✓ Document workflow
- 3 Document alerts

Include document alerts to schedule optional notifications for your file.

**Alert: Sent on specific date**

Email subject

Email body

Send date

Recipients

Email

Name

+ Add another recipient

+ Add myself

+ Add another alert

Back

Submit

## Step 6

Click **Submit** to finish loading your document into Plexus. The document will automatically enter your first nominated stage of the workflow, and an email notification will be sent to the person who first needs to action the document.

# Accessing Documents

All documents will be stored in Plexus under a single menu for ease of searching. You'll be able to harness the search, filter and sorting features to the best of their abilities to create meaningful ways to look at your contracts!

## Viewing the Documents List

Click the **Documents** menu to access a full list of your documents. Most recently created documents will show at the top of your list by default.

**Documents**

Search for content in a document

Drag column headings here to group documents

Search the document list

<input type="checkbox"/> Document name	Main document	Attachment type	Status	Currently with	Counterparty	Contract val...
<input type="checkbox"/> Statement of Work	Master Test Document July 2024 ABC Company	Sub-document	Awaiting signature	eden@deluca.net.au	ABC Company	0.00
<input type="checkbox"/> Master Test Document July 2024 ABC C...	Main document	Main document	Awaiting signature	eden@deluca.net.au	ABC Company	50000.00
<input type="checkbox"/> Statement of Work	MSA & SOW ABC Company July 2024	Sub-document	Executed		ABC Company	0.00
<input type="checkbox"/> MSA & SOW ABC Company July 2024	Main document	Main document	Executed		ABC Company	400000.00
<input type="checkbox"/> Statement of Work	Master Test Document 2024 - DEF Company June 2024	Sub-document	Awaiting signature	eden.deluca@plxs.com.au	DEF Company	0.00
<input type="checkbox"/> Master Test Document 2024 - DEF Com...	Main document	Main document	Awaiting signature	eden.deluca@plxs.com.au	ABC Company	50000.00

## Searching the Document List

Think of the document list like an Excel Spreadsheet. Each column is searchable, can be filtered, and clicked to be sorted in ascending or descending order.

<input type="checkbox"/> Document name	Main document	Attachment type	Status	Currently with	Counterparty	Contract val...
<input type="checkbox"/> Statement of Work	Master Test Document July 2024 ABC Company	Sub-document	Awaiting signature		ABC Company	0.00
<input type="checkbox"/> Master Test Document July 2024 ABC C...	Main document	Main document	Awaiting signature		ABC Company	50000.00
<input type="checkbox"/> Statement of Work	MSA & SOW ABC Company July 2024	Sub-document	Executed		ABC Company	0.00
<input type="checkbox"/> MSA & SOW ABC Company July 2024	Main document	Main document	Executed		ABC Company	400000.00
<input type="checkbox"/> Statement of Work	Master Test Document 2024 - DEF Company June 2024	Sub-document	Awaiting signature		DEF Company	0.00
<input type="checkbox"/> Master Test Document 2024 - DEF Com...	Main document	Main document	Awaiting signature	eden.deluca@plxs.com.au	ABC Company	50000.00

You can also drag and drop a column into your preferred order to prioritise the fields you'd like to see first.

Document name	Main document	Attachment type	Status	Currently with	Counterparty	Contract val...
<input type="checkbox"/> Statement of Work	Master Test Document July 2024 ABC Company	Sub-document	Awaiting signature	eden@deluca.net.au	ABC Company	0.00
<input type="checkbox"/> Master Test Document July 2024 ABC C...	Main document	Main document	Awaiting signature	eden@deluca.net.au	ABC Company	50000.00
<input type="checkbox"/> Statement of Work	MSA & SOW ABC Company July 2024	Sub-document	Executed		ABC Company	0.00
<input type="checkbox"/> MSA & SOW ABC Company July 2024	Main document	Main document	Executed		ABC Company	400000.00
<input type="checkbox"/> Statement of Work	Master Test Document 2024 - DEF Company June 2024	Sub-document	Awaiting signature	eden.deluca@plxs.com.au	DEF Company	0.00
<input type="checkbox"/> Master Test Document 2024 - DEF Comp...	Main document	Main document	Awaiting signature	eden.deluca@plxs.com.au	ABC Company	50000.00

You can click the document's name to access more information on that file.

## Creating document groups

You can create document groups by dragging and dropping any column to the top of the table, as pictured, to create folders based on that column type.

E.g. below: Drag and drop the Counterparty column heading to the Grouping field.

Group	Document name	Main document	Attachment type	Status	Currently with	Counterparty
> ABC Company (5)	<input type="checkbox"/>					
> DEF Company (1)	<input type="checkbox"/>					

## Customising Columns

Show or hide columns by clicking the **table icon** at the top right-hand corner of the documents list.

Document name	Main document	Attachment type	Status	Currently with	Counterparty
<input type="checkbox"/> Statement of Work	Master Test Document July 2024 ABC Company	Sub-document	Awaiting signature	eden@deluca.net.au	ABC Con
<input type="checkbox"/> Master Test Document July 2024 ABC C...	Main document	Main document	Awaiting signature	eden@deluca.net.au	ABC Con
<input type="checkbox"/> Statement of Work	MSA & SOW ABC Company July 2024	Sub-document	Executed		ABC Con
<input type="checkbox"/> MSA & SOW ABC Company July 2024	Main document	Main document	Executed		ABC Con
<input type="checkbox"/> Statement of Work	Master Test Document 2024 - DEF Company June 2024	Sub-document	Awaiting signature	eden.deluca@plxs.com.au	DEF Con
<input type="checkbox"/> Master Test Document 2024 - DEF Com...	Main document	Main document	Awaiting signature	eden.deluca@plxs.com.au	ABC Con

☐ Document id  
☒ Document name  
☒ Main document  
☒ Attachment type  
☒ Status  
☒ Currently with  
☒ Counterparty  
☒ Contract value  
☒ Document type  
☒ Created at  
☒ Executed at  
☒ Start date  
☒ Expiry date  
☒ Created by  
☐ Owner  
☐ Generated by  
☒ Organisation unit  
☐ Reviewers  
☐ Approvers  
☐ Signers  
☒ Shared by

## Saving Views

Once you have found a view that you like, you can click the **Eye Icon** to **Save View**. Once you have multiple views saved, you can toggle between different views by clicking the **Eye Icon** and **Switch View**.

Drag column headings here to group documents

Search the document list

Document name	Main document	Attachment type	Status	Currently with	Counterparty	Switch view	Export val...
Statement of Work	Master Test Document July 2024 ABC Company	Sub-document	Awaiting signature	eden@deluca.net.au	ABC Company		0.00
Master Test Document July 2024 ABC C...	Main document	Main document	Awaiting signature	eden@deluca.net.au	ABC Company		50000.00
Statement of Work	MSA & SOW ABC Company July 2024	Sub-document	Executed		ABC Company		0.00
MSA & SOW ABC Company July 2024	Main document	Main document	Executed		ABC Company		400000.00
Statement of Work	Master Test Document 2024 - DEF Company June 2024	Sub-document	Awaiting signature	eden.deluca@plxs.com.au	DEF Company		0.00
Master Test Document 2024 - DEF Com...	Main document	Main document	Awaiting signature	eden.deluca@plxs.com.au	ABC Company		50000.00

## Print or Export to CSV

You can print or export the current document list selection by clicking the **Screwdriver Icon**.

Drag column headings here to group documents

Search the document list

Document name	Main document	Attachment type	Status	Currently with	Counterparty	Full-width columns	Export to CSV
Statement of Work	Master Test Document July 2024 ABC Company	Sub-document	Awaiting signature	eden@deluca.net.au	ABC Company		
Master Test Document July 2024 ABC C...	Main document	Main document	Awaiting signature	eden@deluca.net.au	ABC Company		

## Viewing your Contract

Plexus will assist our business with keeping everyone on top of their contract workflows, so there's no guesswork when it comes to determining who has and hasn't viewed or actioned a document. With an integrated audit trail for each and every file, Plexus will increase the transparency of our contracts, whilst decreasing the time to execution.

To view a contract's workflow, head to the **Documents** list and click the document's name to access more information on that file.

Drag column headings here to group documents

Search the document list

Document name	Main document	Attachment type	Status	Currently with	Counterparty
Master Test Document 2024 - DEF Company June 2024	Main document	Main document	Awaiting signature	eden.deluca@plxs.com.au	ABC Cor
Statement of Work	Master Test Document 2024 - DEF Company June 2024	Sub-document	Awaiting signature	eden.deluca@plxs.com.au	DEF Com
MSA & SOW ABC Company July 2024	Main document	Main document	Executed		ABC Cor
Statement of Work	MSA & SOW ABC Company July 2024	Sub-document	Executed		ABC Cor
Master Test Document July 2024 ABC Company	Main document	Main document	Awaiting signature	eden@deluca.net.au	ABC Cor
Statement of Work	Master Test Document July 2024 ABC Company	Sub-document	Awaiting signature	eden@deluca.net.au	ABC Cor

## Workflow Timeline

You can view where a document is sitting in its workflow using the timeline at the top of the screen. **Expand** on the timeline to view more information and to **Remind** people about open requests where required.

Master Test Document 2024 - DEF Company June 2024

Edit workflow Actions Share

Review Not required

Approved

Approved by Eden De Luca  
9 May 2024, 01:01 PM

Sign Action required

Document edited by Eden De Luca  
9 May 2024, 12:55 PM

Review changes Send for review

Complete

Expand

Master Test Document 2024 - DEF Company June 2024

Edit workflow Actions Share

Review Not required

Approved

Approved by Eden De Luca  
9 May 2024, 01:01 PM

Sign Action required

Document edited by Eden De Luca  
9 May 2024, 12:55 PM

Review changes Send for review

Complete

Reviewers

Steve Maycock  
steve.maycock@spintofaamania.com.au

Eden De Luca  
eden.deluca@plex.com.au

1st Round

9 May 2024, 01:01 PM

Eden De Luca  
eden.deluca@plex.com.au

1st Round

Eden De Luca  
eden.deluca@plex.com.au

2nd Round

Eden De Luca External  
eden@deluca.net.au

Remind

Collapse

## Supporting Material

You can view existing supporting documents or upload additional supporting material from here.

Supporting material 2

Sub-documents

[Statement of Work](#) Delete

Internal documents

[Project Plan Example.docx](#) Delete

Browse files to upload Link a Plexus document

Upload supporting material

Select a file... Select file

Internal document

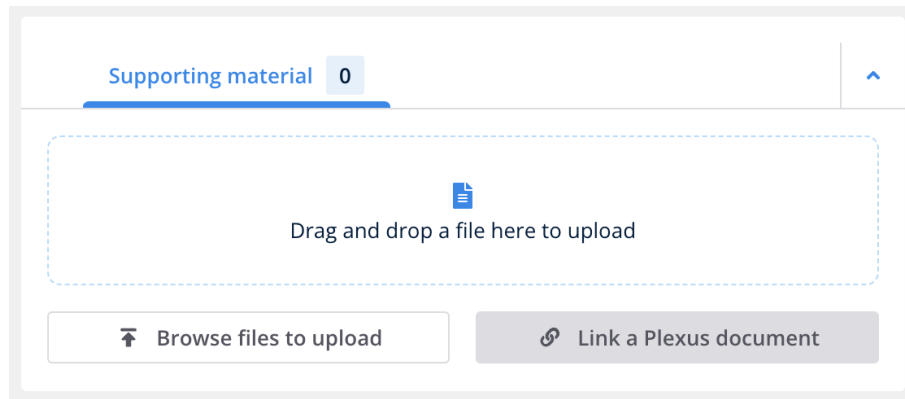
Add a comment...

Cancel Upload

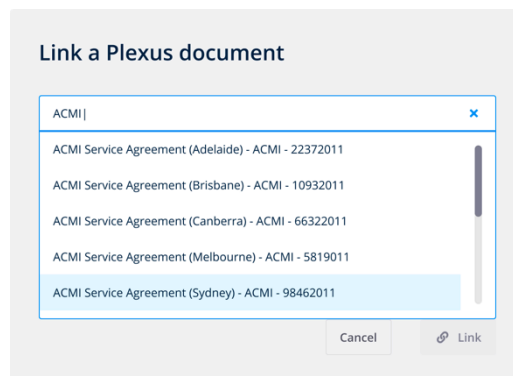
**Note: If your workflow has already commenced past the Review stage you will only be able to upload additional Internal documents.**

### Linking a Plexus Document

Linked documents allows users to highlight the relationships between files by linking related documents for instant access under the supporting material section. You can link any main or sub-document to your document, excluding any documents or sub-documents already associated with the file.



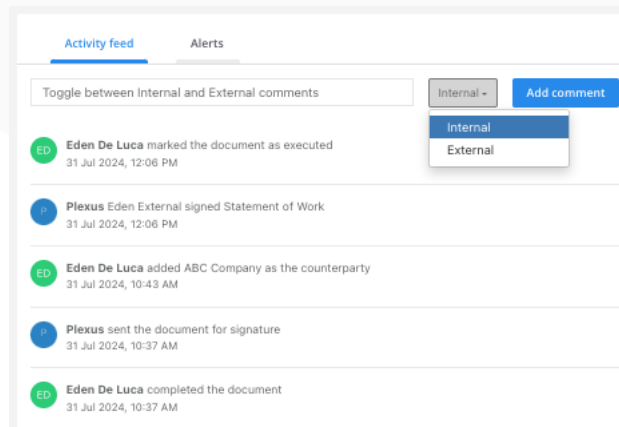
Click **Link a Plexus document** and then type the name of the file in the search bar. Select the file that you would like to link. You can search for and select multiple files.



For further instructions on linking Plexus documents, review this [Plexus Help Article](#).

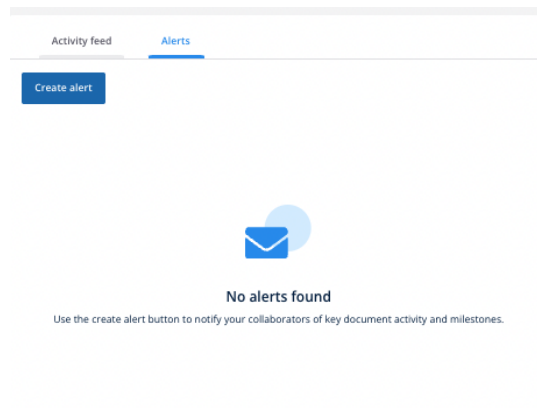
### Activity Feed

You can view a document's audit trail and create **Internal/External** comments that sit alongside your document.



## Creating Alerts

You can create additional alerts based on conditional logic from the **Alerts** tab, found next to the audit trail. Our top tip is to click on the **Advanced Editor** for additional options when creating your alerts.



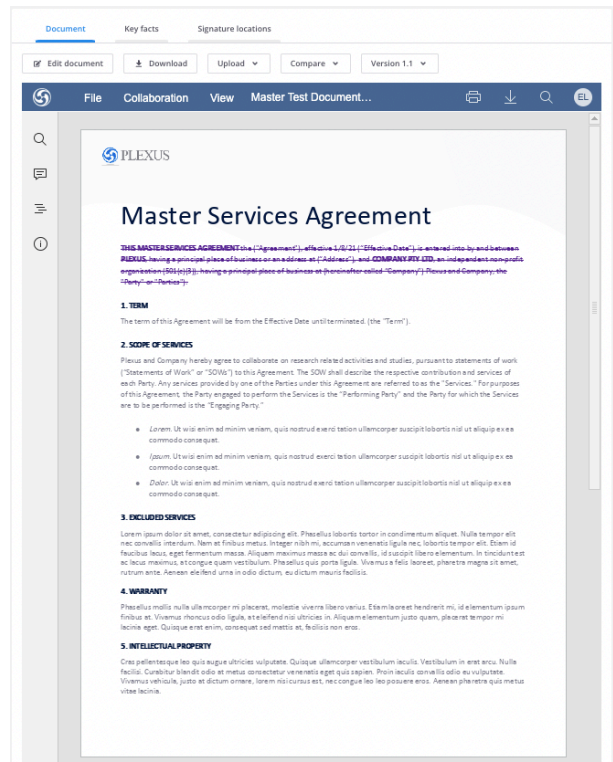


# Document Previews

A preview of the document, its facts and signature locations are available for the team to work with. Note that external parties will have a reduced document preview.

## Document

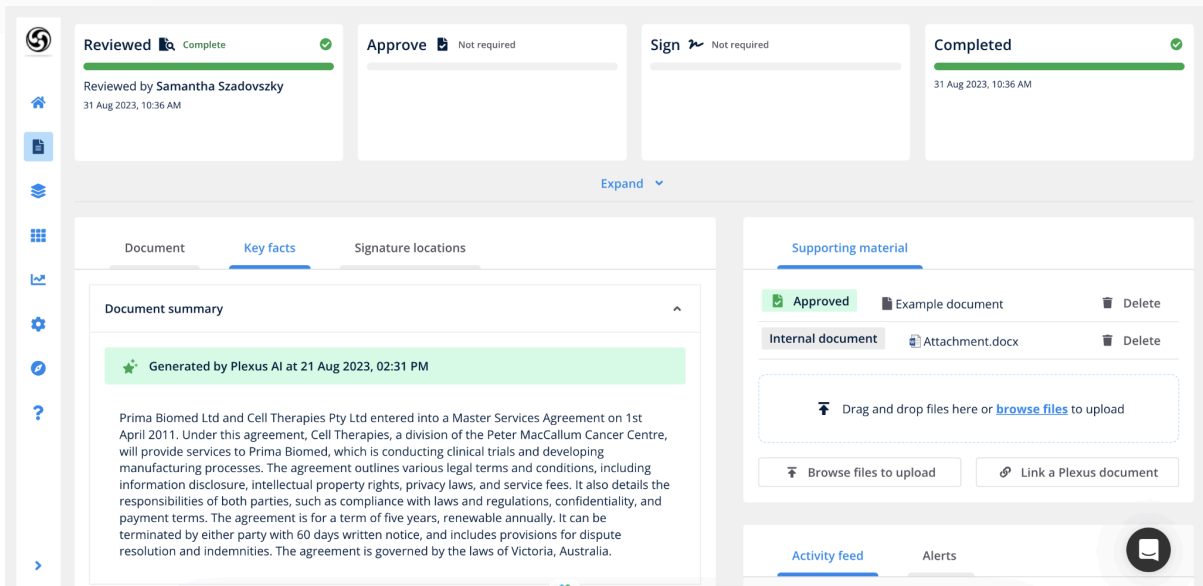
Scroll and view through the document as required.



## Document Summary

A document summary is a common artefact that's typically sent to key stakeholders to support the executive review, approval and signing of contracts.

Plexus AI-generated summaries will give lawyers a starting point for a summary, where they can make any amendments as they choose, to refine or further explain details.



The screenshot displays the Plexus document management interface. At the top, there are four status cards: 'Reviewed' (Complete, green checkmark), 'Approve' (Not required), 'Sign' (Not required), and 'Completed' (31 Aug 2023, 10:36 AM, green checkmark). Below these is an 'Expand' button. The main content area is divided into two panels. The left panel has tabs for 'Document', 'Key facts' (selected), and 'Signature locations'. Under 'Key facts', there is a 'Document summary' section with a green bar indicating it was 'Generated by Plexus AI at 21 Aug 2023, 02:31 PM'. The right panel has a 'Supporting material' section with a table listing documents: 'Approved' (Example document, Delete), 'Internal document' (Attachment.docx, Delete), and a section for uploading files with buttons for 'Browse files to upload' and 'Link a Plexus document'. At the bottom right, there are tabs for 'Activity feed' and 'Alerts'.

All summaries can be edited by anyone with access to the document. This allows lawyers to review and modify the summary as required. It also allows general users to highlight where changes may have occurred on the document, during the course of negotiations.

Hover your mouse over the text area, and click to edit the summary.



This close-up screenshot shows the 'Key facts' tab selected. The 'Document summary' section is highlighted with a green bar indicating it was 'Generated by Plexus AI at 21 Aug 2023, 02:31 PM'. Below this, the text of the summary is displayed: 'Prima Biomed Ltd and Cell Therapies Pty Ltd entered into a Master Services Agreement on 1st April 2011. Under this agreement, Cell Therapies, a division of the Peter MacCallum Cancer Centre, will provide services to Prima Biomed, which is conducting clinical trials and developing manufacturing processes. The agreement outlines various legal terms and conditions, including information disclosure, intellectual property rights, privacy laws, and service fees. It also details the responsibilities of both parties, such as compliance with laws and regulations, confidentiality, and payment terms. The agreement is for a term of five years, renewable annually. It can be terminated by either party with 60 days written notice, and includes provisions for dispute resolution and indemnities. The agreement is governed by the laws of Victoria, Australia.'

## Key Facts

Click the **Key Facts** tab to find a list of all the information you entered when uploading the file. You can also click the **Pencil Icon** to make further edits.

Key facts		^
Status	Awaiting signature	🔒
Author	Eden De Luca	🔒
Owner	Eden De Luca	
Counterparty	ABC Company	
Starts	13 May 2024	
Expires	13 May 2026	
Executed	N/A	🔒
Created	9 May 2024, 12:53 PM	🔒
Contract value	50000.00	
Document type	Master Services Agreement	
Generated by	Approve and eSign	🔒
Organisation unit	Spirit of Tasmania - Legal	🔒

Additional key facts		^
document_type	Master Services Agreement	🔗

Note that edits from this page will not automatically update the document's workflow.

### Signature Locations

If your document has a signature stage, you'll be able to add, edit and remove placeholders from this tab as required.

Document
Key facts
Signature locations

Master Test Document July 2024 ABC Company (plus 1 supporting document)
Tags 0 of 6

**Location tags**  
Drag the tags to your location and use the base for alignment.  
Edit

**1st Signer**  
Eden De Luca

Signature
Initials
Date
Full name
First name
Last name
Title
Email
Company
Text box

**2nd Signer**  
Eden External

Signature
Initials
Date
Full name
First name
Last name

Master Test Document July 2024 ABC Company 1 of 3  
Document Envelope ID: 5E7ER255-43CE-4ABA-A159-B2DF8A2C241B  
**PLEXUS**  

## Master Services Agreement

**1. TERM**  
The term of this Agreement will be from the Effective Date until terminated. (the "Term").

**2. SCOPE OF SERVICES**  
Plexus and Company hereby agree to collaborate on research related activities and studies, pursuant to statements of work ("Statements of Work" or "SOWs") to this Agreement. The SOW shall describe the respective contribution and services of each Party. Any services provided by one of the Parties under this Agreement are referred to as the "Services." For purposes of this Agreement, the Party engaged to perform the Services is the "Performing Party" and the Party for which the Services are to be performed is the "Engaging Party."

- Lorem. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat.
- Ipsum. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat.
- Dolor. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat.

**3. EXCLUDED SERVICES**  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus lobortis tortor in condimentum aliquet. Nulla tempor elit nec convallis interdum. Nam at finibus metus. Integer nisl mi, accumsan venenatis ligula nec, lobortis tempor elit. Etiam id faucibus lacus, eget fermentum massa. Aliquam maximus massa ac dui convallis, id suscipit libero elementum. In tristique est ac lacus maximus, at congue quam vestibulum. Phasellus quis porta ligula. Vivamus a felis laoreet, pharetra magna sit amet, nislum ante. Aenean eleifend urna in odio dictum, eu dictum mauris facilis.

**4. WARRANTY**  
Phasellus mollis nulla ullamcorper mi placerat, molestie viverra libero varius. Etiam laoreet hendrerit mi, id elementum ipsum finibus at. Vivamus rhoncus odio ligula, at eleifend nisi ultricies in. Aliquam elementum justo quam, placerat tempor mi lacina eget. Quisque erat enim, consequat sed mattis at, facilis non eros.

**5. INTELLECTUAL PROPERTY**  
Cras pellentesque leo quis augue ultricies vulputate. Quisque ullamcorper vestibulum laculis. Vestibulum in erat arcu. Nulla facilis. Curabitur blandit odio at metus consectetur venenatis eget quis sapien. Proin laculis convallis odio eu vulputate. Vivamus vehicula, justo at dictum ornare, lorem nisl cursus est, nec congue leo leo posuere eros. Aenean pharetra quis metus vitae lacina.

**6. LIMITATION OF LIABILITY**  
Duis maximus ipsum vel turpis eleifend eleifend. Integer posuere aliquam rhoncus. Vestibulum non fermentum ligula, eu faucibus orci. Mauris facilis lorem nec sem posuere, in suscipit elit lobortis. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos.

Click **Edit** to make your changes. Then drag and drop new and existing placeholders or click the **X** on an existing placeholder to remove it. Remember to click **Save** once you're done.

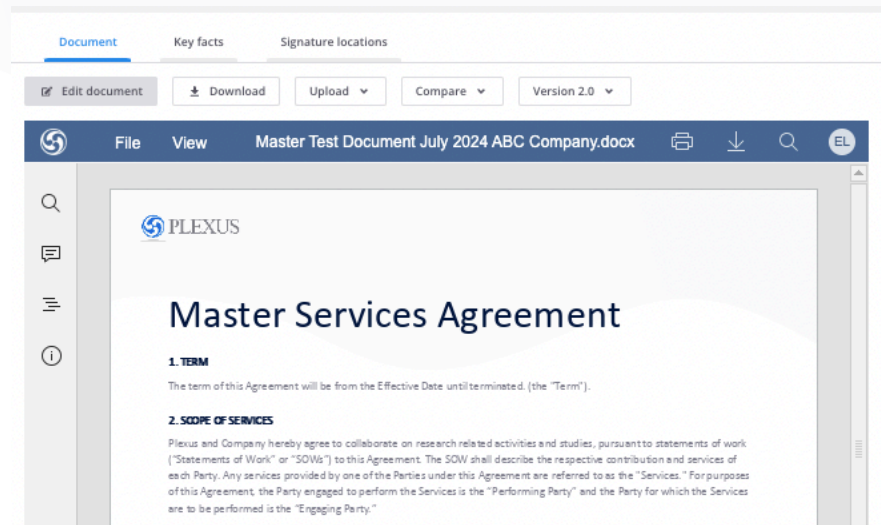
## Negotiation

Plexus will allow us to negotiate non-PDF files using (a) the internal editor, or by (b) uploading amendments.

From the **Document** tab, you'll be able to negotiate on the document should you require it. The document type provided must be an editable file type (eg .docx).

### Editing a Document

Click **Edit Document** to edit the document in the platform. You'll be able to edit the document using the Open Office word processor. Each change will be **tracked** and another member of the team will need to **Accept** that change.



### Saving your changes

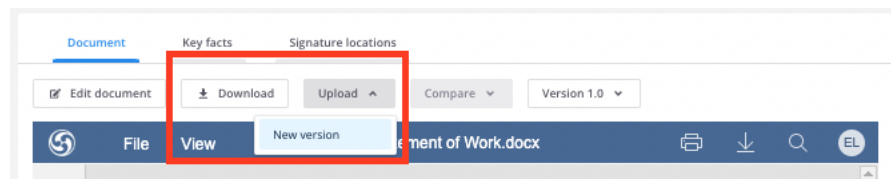
Once you have finished editing, close the editing tab. From the document details page, you will be prompted to choose what happens next in your workflow. This may be a combination of:

- Sending for review, often with your legal team
- Restarting the entire approval stage
- Continuing the workflow

For more information on editing documents in Plexus, [review this Plexus Help Article](#).

### Uploading New Versions

From the **Document** tab, you'll have the option to **Download** the document out of the platform and **Upload** a **New Version** once you've finished editing.



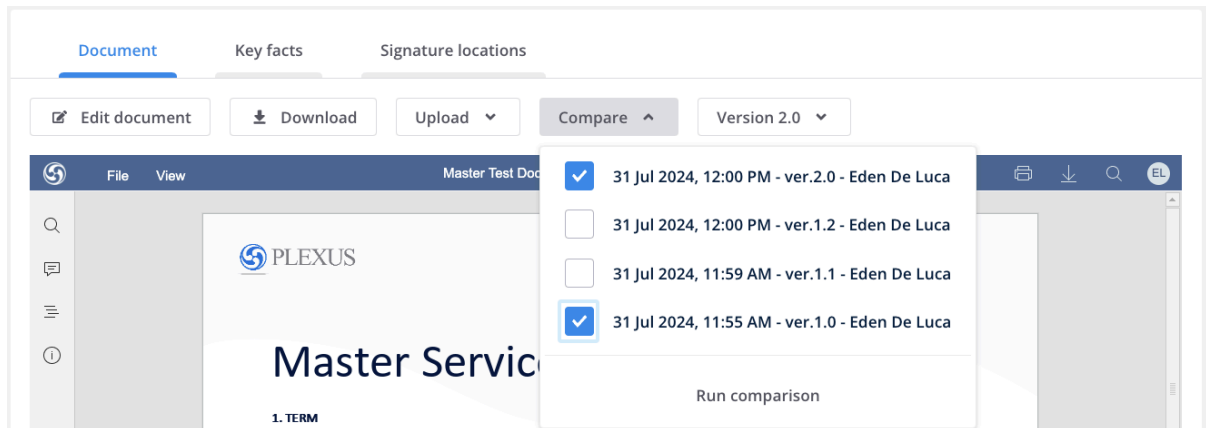
## Version Control

Plexus will allow us to have better control over versioning, ordering, tracking, and visibility of versions in the system.

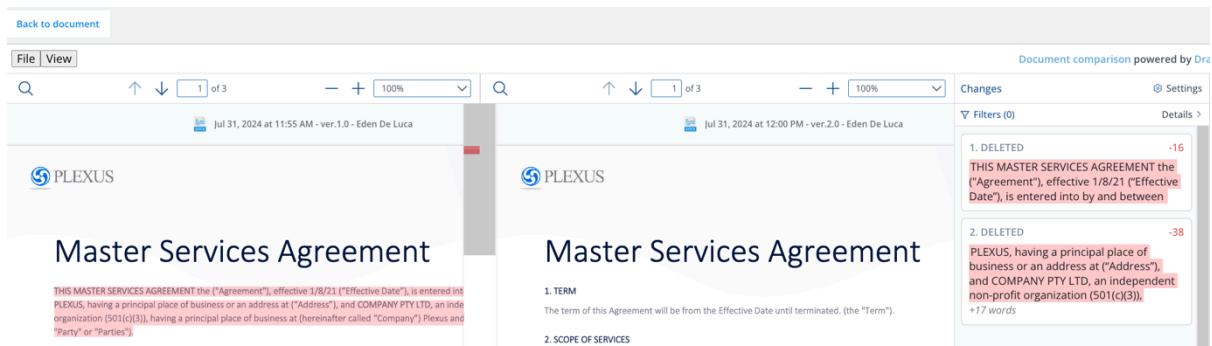
## Comparing Files

If your document has more than one version available in the system, you'll be able to use compare mode to compare any two versions of work side by side.

From the Document Details screen, click **Compare** just above your document's preview. Using the provided **Checkboxes**, click on any two versions of work and click **Run Comparison**.



## Comparison



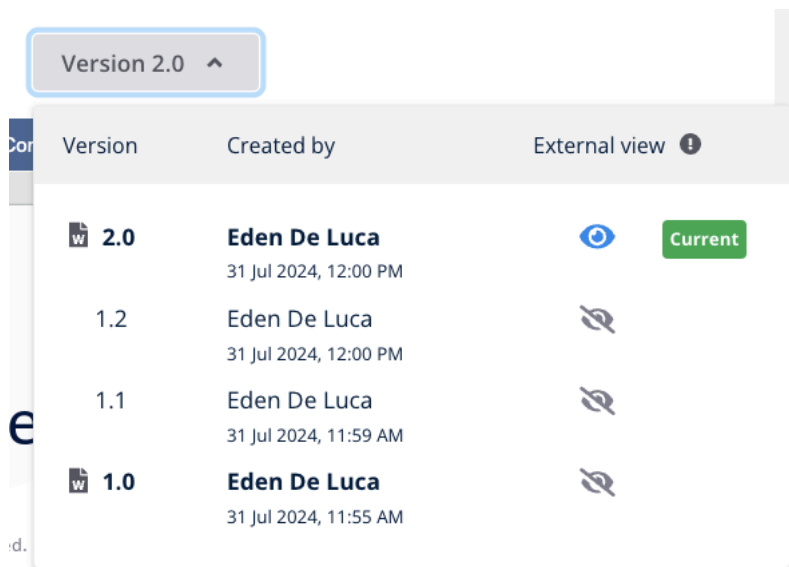
We'll show you those two versions of work, side by side with any changes highlighted as follows:





- Any words or phrases removed between the two versions will be highlighted in red
- Any words or phrases added between the two versions will be highlighted in green.
- A handy quick-view panel down the centre of the screen will allow you to toggle directly to the changes highlighted in the document.
- A handy side-panel will highlight what exactly those text changes were.

## Versioning

The **Versions** button allows you to toggle back to previous versions of the file. It also allows greater flexibility over what external counterparties can see.

Within the Versions dropdown, there's an eye icon that indicates whether or not that version of work is visible to an external recipient when they're sent your contract.



Version	Created by	External view
2.0	Eden De Luca 31 Jul 2024, 12:00 PM	 <b>Current</b>
1.2	Eden De Luca 31 Jul 2024, 12:00 PM	
1.1	Eden De Luca 31 Jul 2024, 11:59 AM	
1.0	Eden De Luca 31 Jul 2024, 11:55 AM	

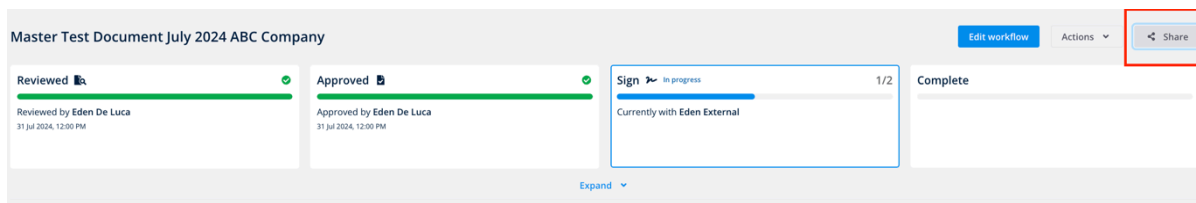
If the eye icon is grey, the document will be hidden from external recipients outside of your organisation. If the eye icon is blue, that version of your file will be shown to those external parties who have access to the file. Clicking on the eye icon will toggle the external view option on and off.

## Sharing Files



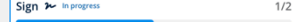
Sharing Files is a great way to collaborate with internal and external parties without including them in the workflow.

### Sharing Files

In the top right hand corner of the Document Details page, click **Share**.




Master Test Document July 2024 ABC Company

Reviewed  Approved  Sign  1/2 Complete

Reviewed by Eden De Luca  
31 Jul 2024, 12:00 PM

Approved by Eden De Luca  
31 Jul 2024, 12:00 PM

Sign  In progress  
Currently with Eden External

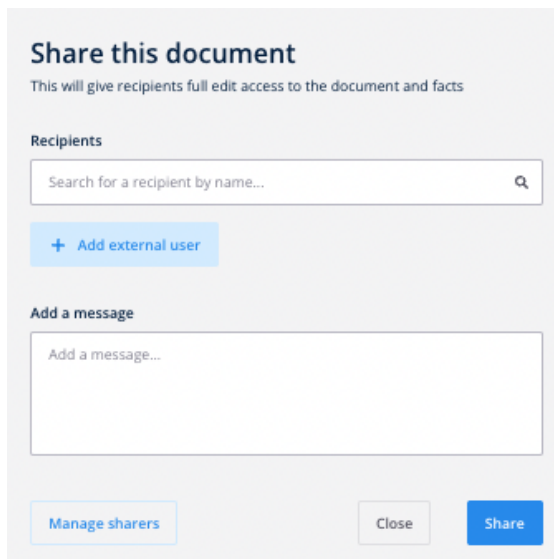
Expand

Edit workflow Actions **Share**

List the recipient(s) you'd like to share your document with. Note that if your shared user is an external user, you'll need to add their details under the button for a **New Contact**.


You can also **Add a message** to your recipients. This will email all added recipients your message and a link to access the file.

Once you are happy, click **Share**.



**Share this document**  
This will give recipients full edit access to the document and facts

**Recipients**

Search for a recipient by name... 

[+ Add external user](#)

**Add a message**

Add a message...

[Manage sharers](#) [Close](#) [Share](#)

## Managing Shares

You can unshare a document anytime by clicking **Manage Shares** in the top right-hand corner of the pop up screen.



**Manage sharers**  
Current recipients with edit access to the document and facts

**External recipients**

External Counterparty	external@counterparty.com	
-----------------------	---------------------------	---

[← Back](#) [Close](#)

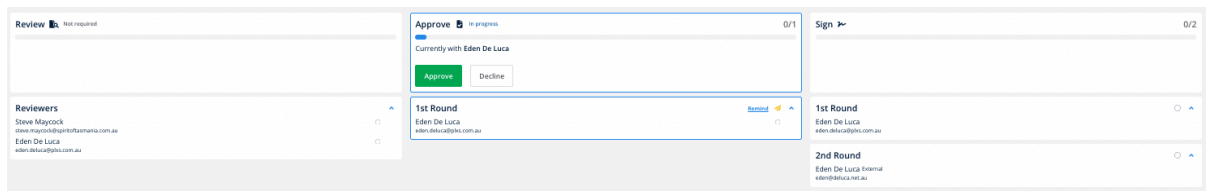


## The Contract Workflow

Progressing a workflow is best managed from the workflow timeline. Where your action is required, Plexus will let you know via an email, and an actionable button in the timeline view.

Once a contract has finished legal review, and once all mark-ups and comments have been resolved, it can progress through to the next stage of the workflow.

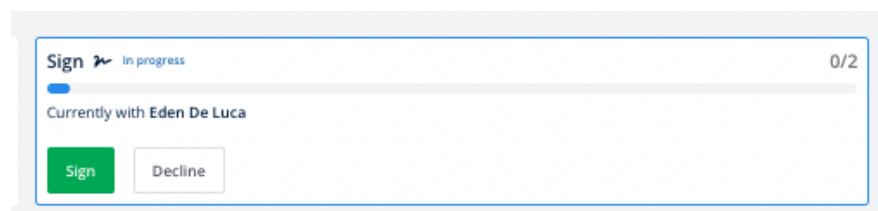
After approvals are provided, the document will progress to the signing stage, which is managed inside DocuSign.



## Signing in DocuSign

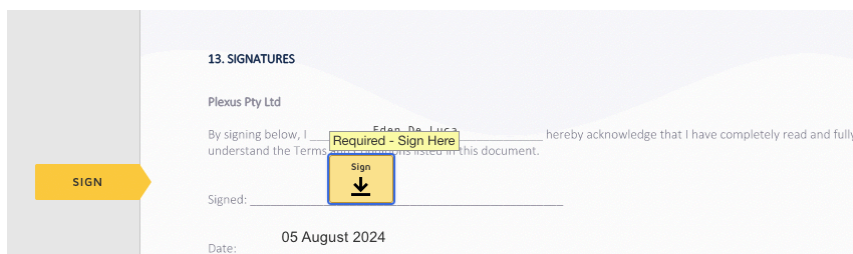
Obtaining digital signatures in Plexus will be a breeze.

If you've been nominated as a signer in a document, you'll receive an email notification to let you know. Before you sign the contract, you may like to navigate to the document to review all key details about that file. Once you're ready to sign, click **Sign** from your document timeline.



Plexus will take you through to DocuSign where you'll need to click the **checkbox** to agree to use electronic records and signatures. Click **Continue** to progress further.

You'll then be able to click the **Sign** button where you can follow the yellow buttons to insert your signature and any other required information.



When you sign the document, DocuSign provides three options to:

- Select a Signature (stylised by DocuSign)
- Draw
- Upload a Signature

### Adopt Your Signature

Confirm your name, initials and signature.

\* Required

Full Name\*

Eden De Luca

Initials\*

EDL

[OR SELECT A SIGNATURE](#)

[DRAW](#)

[UPLOAD](#)

PREVIEW

[Change Style](#)

<p>Signed by:</p> <p><i>Eden De Luca</i></p> <p>7982677DD08E4F1...</p>	<p>Initial</p> <p><i>EDL</i></p>
--	----------------------------------

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts.

ADOPT AND SIGN

CANCEL

Choose the option that you wish to use and click **Adopt and Sign** to execute the document. Click **Finish** to finalise your signing stage.

## Process for a Fully Signed Document

A strong process for fully executed documentation is coming our way!

Once a document is signed, the document will either be sent to the next required signer in the workflow, or if no additional signers are required, the document will move to the Executed phase and the following users will be notified via email:

- Author - you
- Owner - nominated at upload stage
- Internal shared users - where you have used the **Share** function to share a document
- Signers - nominated in the signing round

When the document has been signed, DocuSign will send you a copy of the fully signed document. You'll also be able to Download a DocuSign certificate of completion from the **Download** button should you require it.

The fully signed document will be automatically stored in your **Documents** list with an **Executed** status.

## Requesting Legal Support

It's now easier than ever to get in touch with Legal at TT-Line. The Request Legal Support app is designed to help teams to fully capture legal matters digitally, whilst enhancing transparency with the legal team for the duration of the interaction.

### Step 1

Click on the **Request Legal Support** tile on the Dashboard.



Request legal  
support

### Step 2

Lodge your matter by adding a title for your request and selecting the categories from the available dropdown fields. This will help the legal team to triage the query to the right person. Click **Next** once you're done.

#### Request legal support

Last saved at 05 August 2024, 3:56 pm

[Start a new submission](#)

##### What is the nature of your issue?

Enter title here

The title of your Matter should go here.

Select category

Regulatory, Licensing & Compliance

✕ ▾

Select sub-category

Advice/Other

✕ ▾

Next

### Step 3

In the following section, provide as much detail about your matter as you can. Fill in:

- What you need help with
- When you need a response by
- Financial value
- Whether any other parties are involved
- Whether you're lodging a query on behalf of someone else ('owner')
- Whether you have any relevant documentation, or existing Plexus documents to upload with your query.

Note that both you and the Legal team will have the ability to make changes to this section later.

### Request legal support

Last saved at 05 August 2024, 3:56 pm

[Start a new submission](#)

✓ **What is the nature of your issue?**

2 **Tell us what you need help with**

What do you need help with?

When do you need a response by?



Optional

Financial Value e.g 5000

Optional

Are any other parties involved?

✓ Yes

✗ No

Are you creating this request on behalf of someone else?

✓ Yes

✗ No



Drag and drop a file to upload

📁 Browse files to upload

🔗 Link a Plexus document

[Back](#)

[Next](#)

## Step 4

PlexusAI will generate personalised questions related to your legal matter. Answering these questions will assist with reducing the time spent going back and forth with the legal team about questions related to your matter.

### 3 AI generated questions

★ AI-generated questions have been created to give your colleague enough context to fulfil this legal request

What is the specific compliance issue you are facing? ★

Can you provide more details about the regulatory, licensing or compliance matter in question? ★

Do you have any relevant documents or correspondence that could provide more context to this situation? ★

Are there any specific regulations or laws that you believe may be relevant to this issue? ★

What actions have been taken so far regarding this compliance matter? ★

[Back](#)

[Submit](#)

## Step 5

Click **Submit** once you're done.

You will then be automatically redirected to view the Matter you created. Your matter will also be available from the Matters panel in the bottom right-hand corner of your Dashboard. You can also access it from the Matters list.

# Locating Your Matters

View your legal requests in an easy to view spreadsheet-style table.

From the Matters list, you'll see all matters that you've submitted to legal along with their key details. You'll also see any matters that have been assigned to you by someone else.

## Searching the Matters List

Think of the document list like an Excel Spreadsheet. Each column is searchable, can be filtered, and clicked to be sorted in ascending or descending order.

**Matters**

View my matters ☐

**Hold Control / Command and click to open matters in new tab** X

Drag column headings here to group matters

Search the matters list

Matter ID	Matter	Status	Priority	Counterparty	Due By	Created By	Assigned To	Created	Closed Date	Days in status (0)
<input type="checkbox"/>	Test Matter - Lost USB 1	Closed	Medium	Example Company	5 Aug 2024	Eden De Luca	Eden De Luca	4 Jul 2024	24 Jul 2024	

You can also drag and drop a column into your preferred order to prioritise the fields you'd like to see first.

You can click the Matter's name to access more information on that file.

## Grouping Matters

You can create a folder like format by dragging and dropping any column to the top of the table, as pictured to create folders based on that column type.

Search the matters list

Group	Matter ID	Matter	Status	Priority	Counterparty	Due By	Created By	Assigned To
> Closed (2)	<input type="checkbox"/>					dd/mm/yyyy		
> Open (2)	<input type="checkbox"/>							

## Customising Columns

Show or hide columns by clicking the table icon at the top right-hand corner of the matters list.

Search the matters list

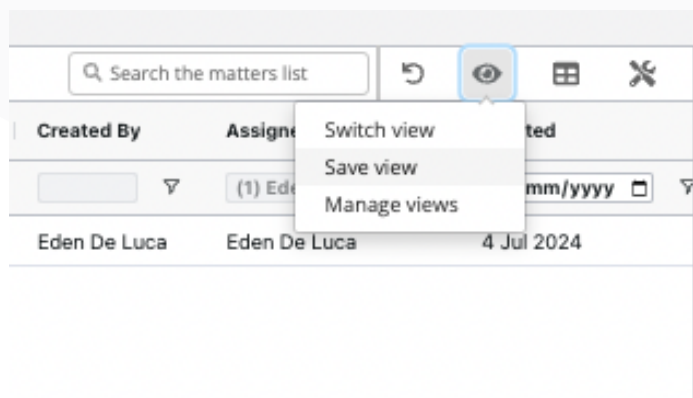
Search... Select columns to display

Due By	Created By	Assign
dd/mm/yyyy	(1) Ed	
5 Aug 2024	Eden De Luca	Eden C

- ☒ Matter ID
- ☒ Matter
- ☒ Status
- ☒ Priority
- ☒ Counterparty
- ☒ Due By
- ☒ Created By
- ☐ Organisation unit
- ☒ Assigned To
- ☐ Category
- ☐ Sub-category
- ☒ Created
- ☒ Closed Date
- ☒ Days in status (Open)
- ☒ Days in status (In progress)
- ☒ Days in status (Waiting - Intern
- ☒ Days in status (Waiting - Extern
- ☒ Financial Value
- ☒ Last Assigned Date
- ☒ Last Modified Date
- ☒ Last Modified By

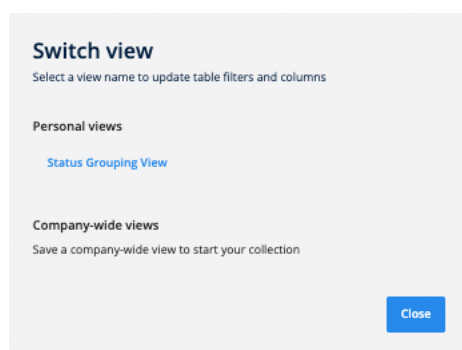
## Saving Views

Once you have found a view that you like, you can click the **Eye Icon** to **Save View**. Once you have multiple views saved, you can toggle between different views by clicking the **Eye Icon** and



## Switch View

Switch between your saved views or any company-wide views as required.



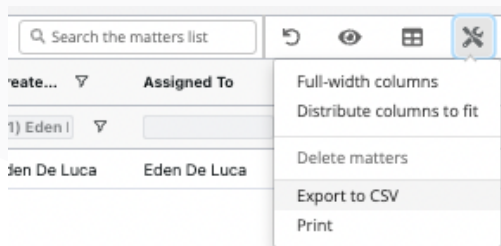
## Reset View

Should you need to, you can also reset your view back to default settings by clicking the Reset icon



## Print or Export to CSV

You can print or export the current matter list selection by clicking the **Screwdriver Icon**.



## Managing Your Matters

Create a single view to manage your entire matter.

From the Matter Details page, you'll be able to manage each and every element of your legal support matter.

**Test Matter - Lost USB 1**

Status

Priority

Due date

✓ Closed

● Medium

05 Aug 2024, 11:59 PM

Assigned to

ED

+

Fact view

Document view

Draft advice

Click into the sections to edit the details and key facts.

Details

I have left my usb on the train and it contains important client information and im not sure what to do next. help!

Key facts

Matter ID	
Category	Privacy/Data Protection
Sub-category	Data Breach
Financial value	60,000
Counter party	Example Company
Raised on behalf of	Not specified
Created by	Eden De Luca (eden.deluca@plx.com.au)
Created on	4 Jul 2024, 02:58 PM
Organisation unit	Spirit of Tasmania - Legal

Supporting material 2

Internal documents

Master Test Document.docx

Uploaded on 04 Jul 2024

Create workflow

Project Plan and Related Contract.eml

Uploaded on 04 Jul 2024

Create workflow

Browse files to upload

Link a Plexus document

Activity feed

Paragraph

B

I

U

A

Add new comment

Comment

ED

Eden De Luca updated the Due date

11 Jul 2024, 11:59 PM

→

5 Aug 2024, 11:59 PM

5 Aug 2024, 04:09 PM

ED

Eden De Luca updated the Counterparty

Not specified

→

Example Company

### Renaming Matters

Once you have an existing Matter in the platform, you'll be able to rename your matter from the Matter List. Click into that matter to find the matter details page.

If you hover over the name of the matter, you'll be able to click to **Edit the title**.



Test Matter - Lost USB 1 

Test Matter - Lost USB 1



Click the **tick** to save your changes, or the **cross** to cancel your edits.

### Editing Matter Details

From the Fact View, you'll be able to view and/or alter crucial details about your matter including:

- **Due date** - You can edit the due date using a calendar picker. Use the arrows to toggle between the months, and select your new due date as required.

#### Due date

05/08/2024



- **Status** - You can mark a matter as open, in progress, closed or cancelled. This change will be reflected in your Matter List. Note that for auditing purposes, you cannot delete a matter once it's been created, however you can cancel it.

#### Status

Closed

Open

In progress

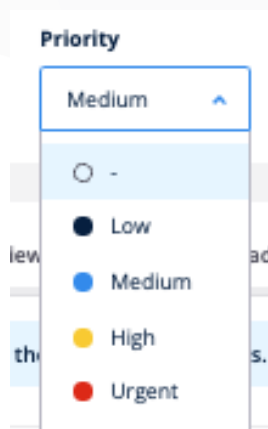
Waiting (internal)

Waiting (external)

Closed

Cancelled

- **Priority** - From the priority field, you can view whether a matter has been marked as Low, Medium, High or Urgent in priority. Note that only the legal team will be able to change the priority of a matter.



- **Assignee** - From the assignee field, you can view who a matter has been assigned to. Note that only the legal team will be able to change the assignees on a matter.


Assigned to



- **Key facts** - To edit the matter's description, click into the description box to Edit. You may also hover over and click into each of the related facts to edit further details directly. Note that fields with the lock symbol are not editable.

Details	
I have left my usb on the train and it contains important client information and im not sure what to do next. help!	

Key facts	
Matter ID	
Category	Privacy/Data Protection
Sub-category	Data Breach
Financial value	60,000
Counter party	Example Company
Raised on behalf of	Not specified

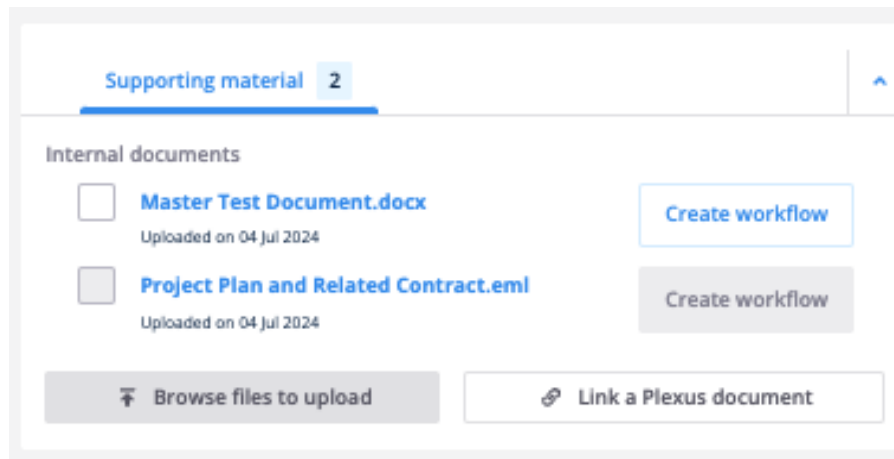
Click the **Tick** to save your edits per fact.

## Uploading Supporting Material

Typically, supporting material for a matter is uploaded when you create the matter.

Any supporting material loaded to the matter is found to the right-hand side of the Matter Details screen under the heading for Supporting Material.

You can also upload a file from here too. To do so drag and drop the file into the box provided or **Browse** your computer to upload additional files as required.

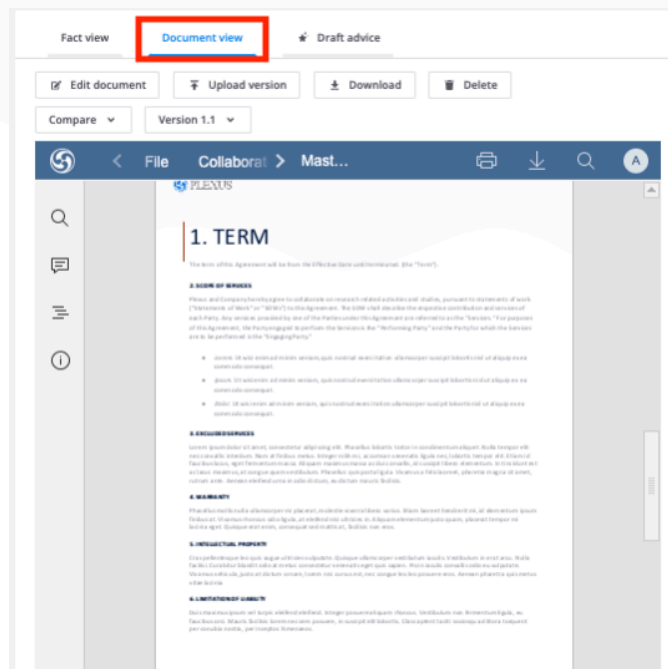


## Linking a Plexus document

Use the Linking feature to highlight the relationship between documents and matters. This will allow you to Link an existing Plexus document to your Matter by searching the document name. You can do this for up to 50 documents, both sub-document and main document types.

## Viewing Supporting Material

Once a matter has supporting material attached to it, you can click the Name of the document to open up a preview of that file in Plexus. When you click the name of the document, Plexus will open the **Document View** tab.

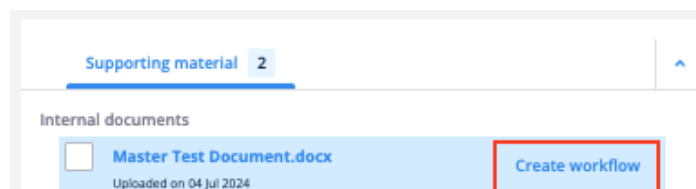


You'll also find quick access to the **Document View** next to the **Fact View**.

From the Document View, you can:

- Edit your document and collaborate with other people within Plexus
- Upload Versions of the document from your computer
- Download the file out of the system
- Delete the file
- Compare files if there are 2 or more versions of work
- View Versions if there are 2 or more versions of work loaded

If you would like to have a document in your supporting material signed or approved, simply click **Create Workflow** from the right-hand side of the screen to send the file to the Approve and eSign App.



## Using the Audit Trail

Each matter saved in Plexus has a unique activity feed that keeps track of each of the key actions made against a matter, including:

- Edits to the name of the matter

- Edits to the matter's key facts, including status, assignees and due dates
- Comments

All activity on the matter is time-stamped and added to the activity log for reference.

Any comment that's added to the activity feed is accompanied by a notification that's sent to:

- The author of the matter
- The assignee
- The contact - where another "Owner" of the matter was indicated upon matter submission
- The triage member where a matter has no assignee (Lawyers only)

To leave additional comments on the Activity Log, simply type away into the textbox and click **Comment** in order to submit it.

Anyone with access to the matter will be able to view and **Reply** to that comment as required.

## Accessing Support

If you need assistance from Plexus during the process, reach out using the **Chat Bubble** in the bottom right hand corner of your screen or email [support@plexus.co](mailto:support@plexus.co). Otherwise, reach out to our Adoption Champion, **[client Adoption Champion name]** for further assistance.

