User Guide

Learning Management System

INSPIRE EDUCATE LEAD

FortuneBuilders

Version 1.0
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Introduction

This User Guide covers the Learning Management system and all of its features and functionality.

The Learning Management System is central to your financial education and a cornerstone of your program. It is recommended to read this guide to understand functionality and proper feature use.

When you log in to the LMS for the first time, you'll have the option to take a quick tour of the homepage.

Dashboard

The Dashboard is your source for everything LMS-related; you can access all important LMS learning and resources right from this page.

Dashboard Access

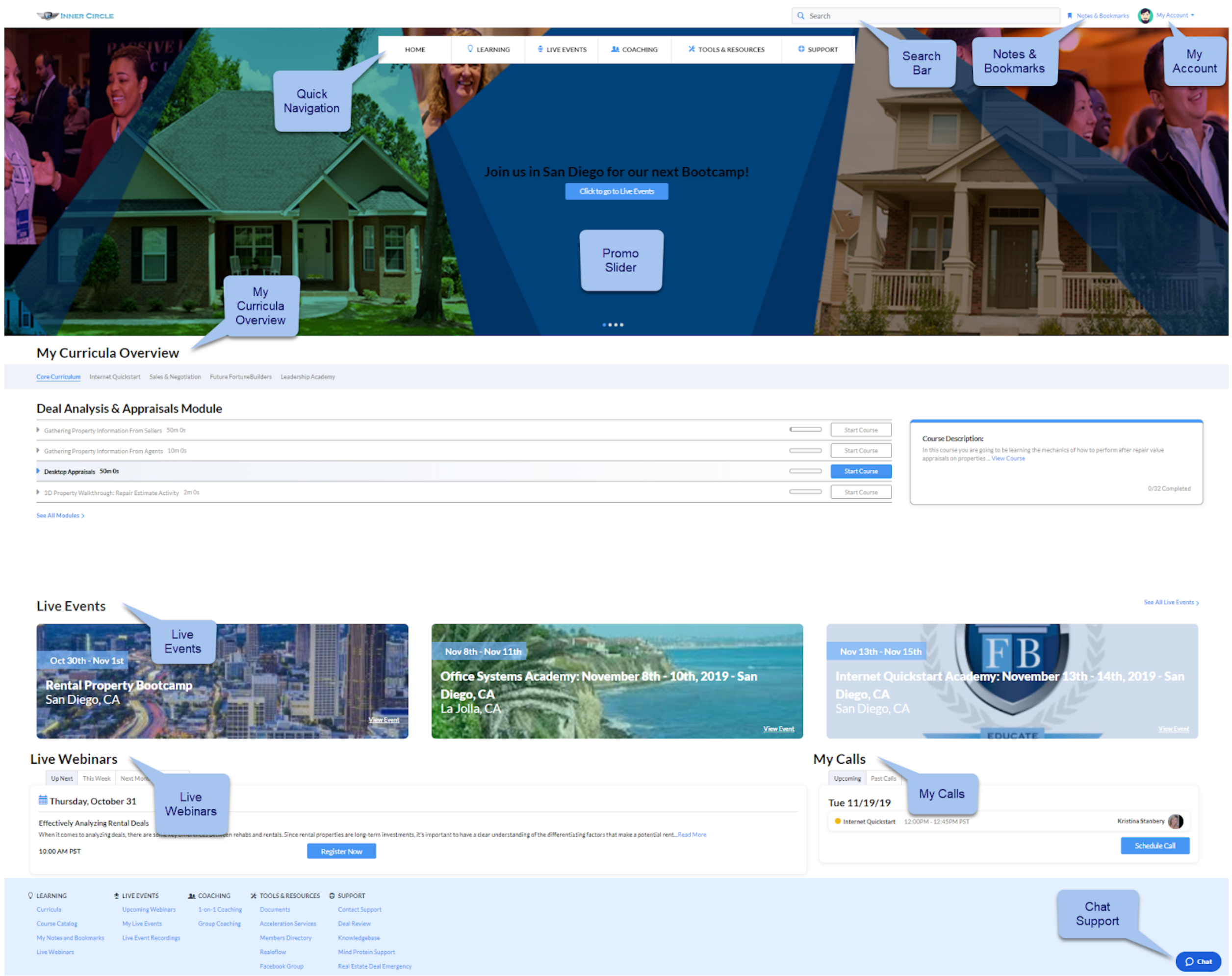
The student dashboard is set as the LMS homepage; you will see the dashboard immediately upon logging in to the Learning Management System.

To Access the Dashboard

1. Navigate to members.fortunebuilders.com
2. Enter your account Username and Password

Dashboard Layout Overview

The dashboard design consists of seven sections - Quick Navigation, Promo Slider, Notifications, My Curricula Overview, Live Events, Live Webinars, and My Coaching Calls. These sections are designed to give you access to all important aspects of the LMS at a glance. Near the bottom of each page will be a Quick Links Menu which allows you to quickly access important features of the Learning Management System.



Quick Navigation

The Quick Navigation menu allows you to quickly jump to pages centered around specific aspects of your program.

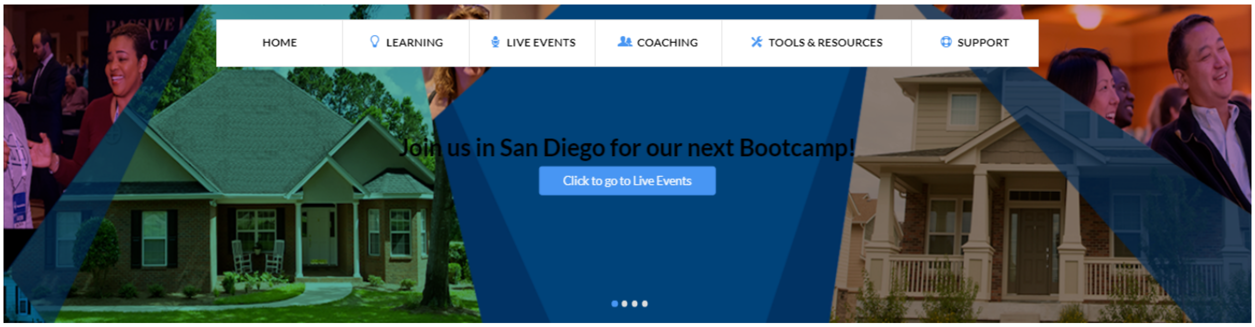
HOME	LEARNING	LIVE EVENTS	COACHING	TOOLS & RESOURCES	SUPPORT

Quick Navigation Details

- **Home** – Brings you back to the Dashboard homepage.
- **Learning** - Displays a menu and Learning Window where you will interact with learning content.
- **Live Events** – Displays Upcoming Live Events and My Upcoming Live Events.
- **Coaching** – Displays the 1-on-1 Coaching Calendar, Group Coaching, My Calls, and Coaching Notes.

- **Tools & Resources** – Displays essential links and tools related to your program.
- **Support** – Displays sections for general support, deal review, technical support, and Mind Protein support.

Promo Slider Overview
The Promo Slider highlights announcements and events important to your program.

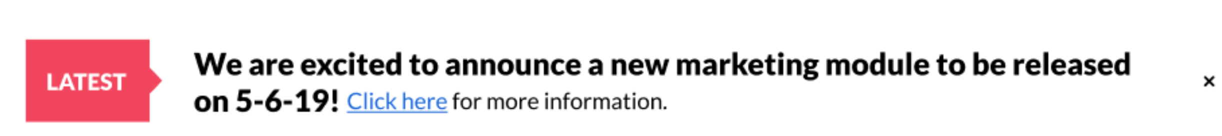


Promo Slider Details
The information displayed on sliders includes:

- **Slider Image** – The background image displayed for the announcement/slider
- **Text** - The body of the slider message.
- **Call to Action** – Link which when clicked, gives more details or brings you to the slider's details page.
- **Radio Button -** Navigation for the promo slider. Click each circular icon to navigate to the respective slider.

Promo Slider Features
- **Auto-advance** – The slider will rotate to the next slider in sequence after 5 seconds.

Notifications Bar Overview
The Notifications Bar will display pop up notifications relating to important system information, as well as notifying you of new courses and other important information.



Notifications Bar Details
The information displayed on notifications include:

- **Notification Icon** – Icon that indicates its status. Options include Latest, New, Important, and Did You Know.

- **Text -** The body of the notification. Will be displayed in bolded text.

- **Call to Action -** Link and/or additional information related to the notification.

Notification Bar Features

- **Dismiss** – Hides the specific notification from view.

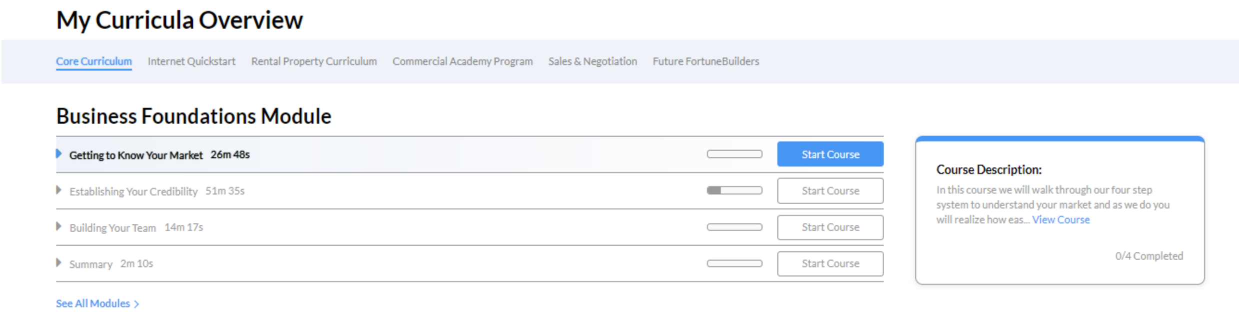
- **Multiple Notifications -** The system can display multiple notifications. Dismissing the most recent notification will load the next most recent one the next time you load the page.

Things to Note

- The notification may change depending on the context of the page. For example, the Live Events page can display notifications specific to live events, the Coaching page can display notifications specific to coaching, etc.

My Curricula Overview

The Curricula Overview section will display all curricula included in your program (Core Curriculum, Sales & Negotiation, Rental, etc.).



My Curricula Overview Details

The information displayed in the My Curricula section includes:

- **Curriculum Tab** – Allows you to switch between curricula included in your program.

- **Module Title -** Displays the title of the specific module within the curriculum. Note that only the Core Curriculum includes modules. This will not display for all other curricula.

- **Course Title -** Displays the title of the specific course within the module/curriculum.

- **Progress Bar** - Displays an estimate of your progress within a course.

- **Start Course Button** - Brings you to the course page where you can watch/complete the course.

- **Course Description**

    - **Description -** Displays a short text prompt describing the contents of the course.

- **View Course** - Clicking the View Course link will take you to the course page.

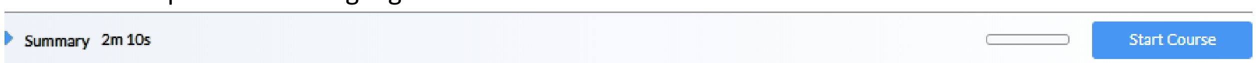
- **Completion Tracker -** Displays progress as a count of completed videos compared to the total number of videos within the course.

- **See All Modules** - Brings you to the curriculum page where you can see a list of all modules within curricula that contain modules.

- **See All Courses** - Brings you to the curriculum page Detailed Course List view where you can view courses within curricula that do not contain modules.

My Curricula Overview Features

- **Hover**– Hovering over a course will highlight the course, as well as displaying the course description for the highlighted course.



Things to Note

- Only the next four courses that are incomplete within the curriculum will be shown.

- Courses are removed from this view as they are completed.

Live Events Overview

The Live Events section will highlight upcoming events relating to your program.

Live Events Details

The information displayed in the Live Events section includes:

- **Image** – Displays a background image associated with the event.

- **Date Banner -** Displays the start and end date of the event.

- **Event Title** - Displays the name of the event.

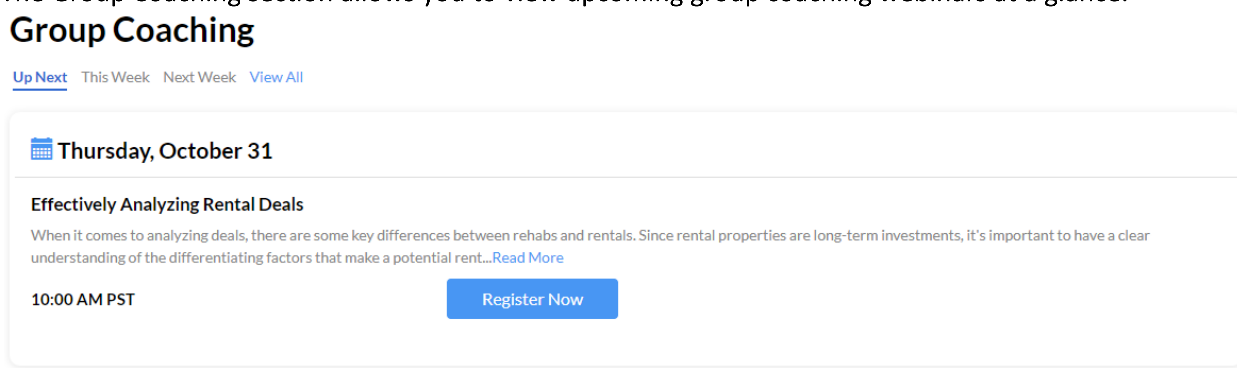
- **Event Location -** Displays the location where the event is occurring.

- **View Event Link** - Brings you to the event's details within the live events page.

- **See All Live Events** - Brings you to the live events page.

Group Coaching Overview

The Group Coaching section allows you to view upcoming group coaching webinars at a glance.



Group Coaching Details

The information displayed in the Group Coaching section includes:

- **Date Filters**– Changes the display of group coaching webinars by date. Options include up next (default), this week, next week, next month, and past webinars.

- **View All** - Brings you to the coaching page where you can view and register for all upcoming group coaching webinars.

- **Date -** Displays a calendar icon with the date of the group coaching webinar.

- **Webinar Title -** The name of the group coaching webinar.

- **Webinar Description -** A short description of the group coaching webinar's content.

- **Webinar Time Selection** - Displays the start time of the group coaching webinar. If there are multiple attendance options, this will be replaced by a time selection drop-down.

- **Registration Button -** Allows you to register for the group coaching webinar from this section.

Group Coaching Features

- **Registration Confirmation** – Registered group coaching webinars will display a confirmation of registration.

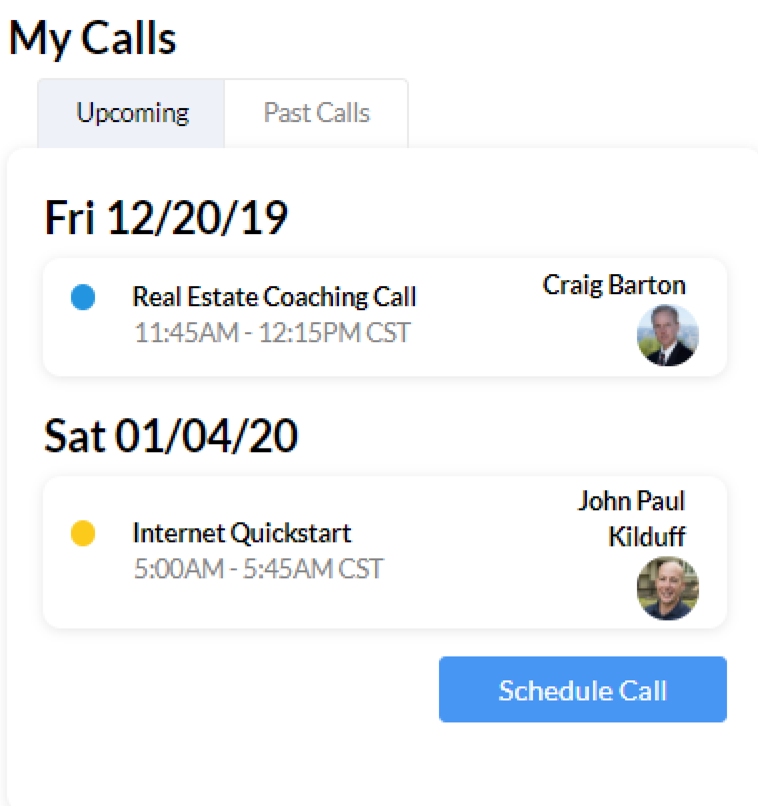
- **Action - Description** - A Read More link is available to expand the section to see the full description. If expanded, there will be a Read Less option to return to the original description view.

Things to Note

- For group coaching webinars with multiple times available, the registration button will be inactive until a time is selected.
- Date filters will not show if there are no webinars taking place in that time period.

My Calls Overview

The My Calls section allows you to review upcoming calls booked with a coach, review past calls, as well as schedule calls with a coach.



My Calls Details

The information displayed in the My Calls section includes:

- **Call Filters**– Changes the display of calls. Options include upcoming (default) and past calls.
- **Date** - Each call is separated into sections by date.
- **Call Type Icon** - A colored icon which corresponds to the call type.
- **Call Type -** Lists the type of coaching call.

- **Time -** Lists the start time and end time of the coaching call.
- **Coach Name -** Lists the name of the coach the call was booked with.
- **Coach Picture -** Shows a picture of the coach the call was booked with.
- **Schedule Call** - Links to the Coaching page where you can book calls with coaches.

My Calls Features

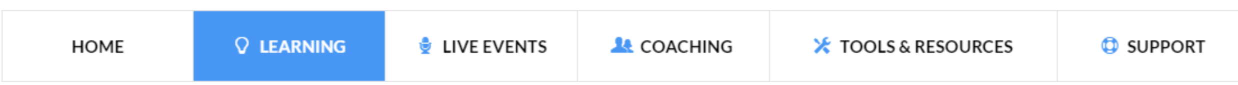
- **Click on Upcoming Call** - Clicking on an upcoming call will display details about the call, a short coach bio, and an option to cancel the call.
- **Click on Past Call** – Clicking on a past call will display call details and a short coach bio. Clicking on the back arrow icon will return you to the Past Calls view.

Learning

The Learning page is where you can manage and interact with any curricula, modules, courses, chapters, and lessons within the LMS.

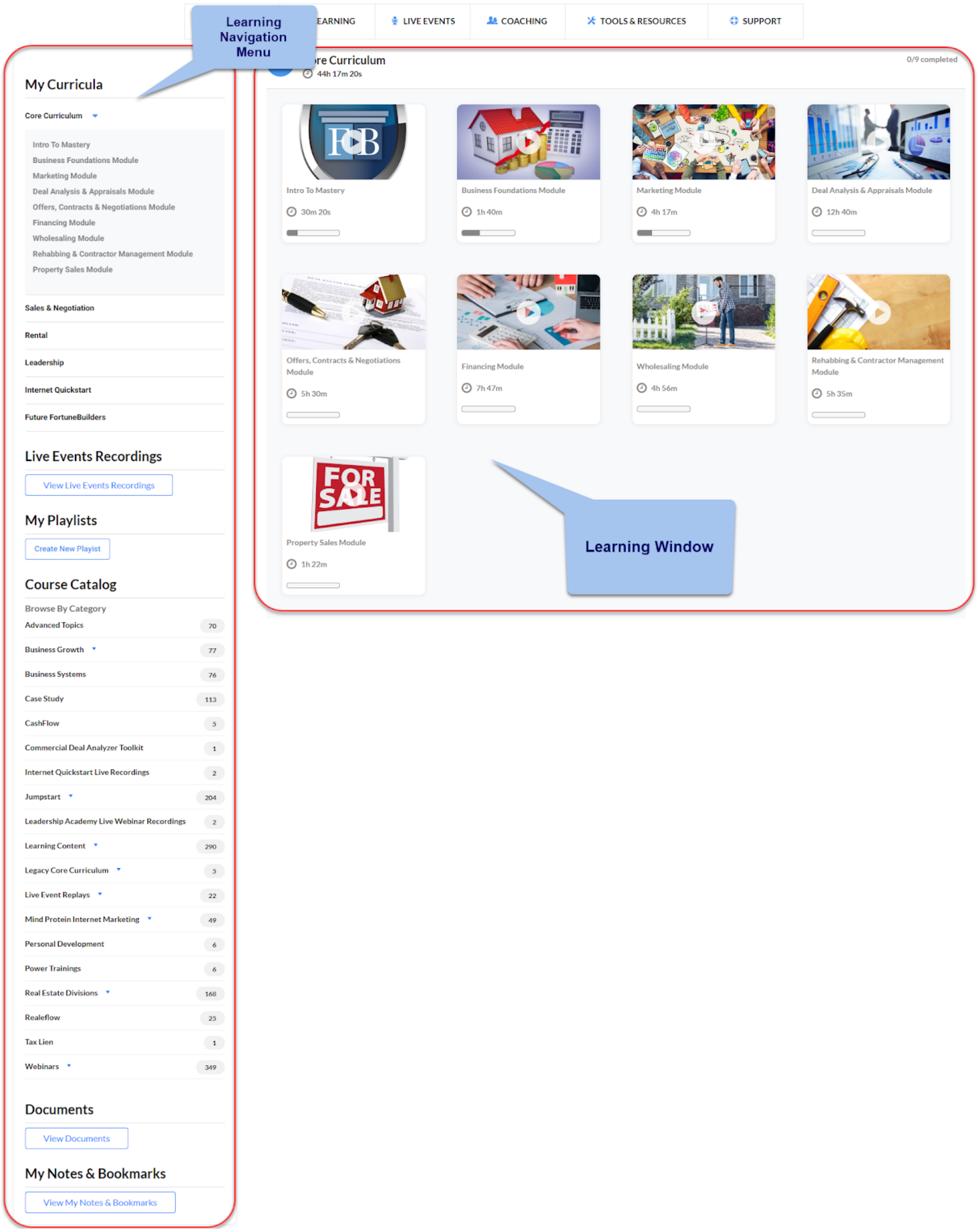
Learning Page Access

To access the Learning page, click on Learning from the Quick Navigation bar on the Dashboard.



Learning Page Overview

The Learning page layout consists of two areas: the learning navigation menu and the learning window.



The Learning Navigation Menu is composed of:

- **My Curricula** - Curricula/courses included in your program.
- **Live Events Recordings -** Recordings of live events that you can access at any time.
- **My Playlists -** Collections of courses and lessons you can bundle together.

- **Course Catalog** - A catalog of all courses in the system, including those in curricula and elective courses.

- **Documents** - Files associated with courses or standalone learning documents.

- **My Notes & Bookmarks** - Access notes you've added to lessons, and bookmarked courses/lessons.

Learning Window Overview

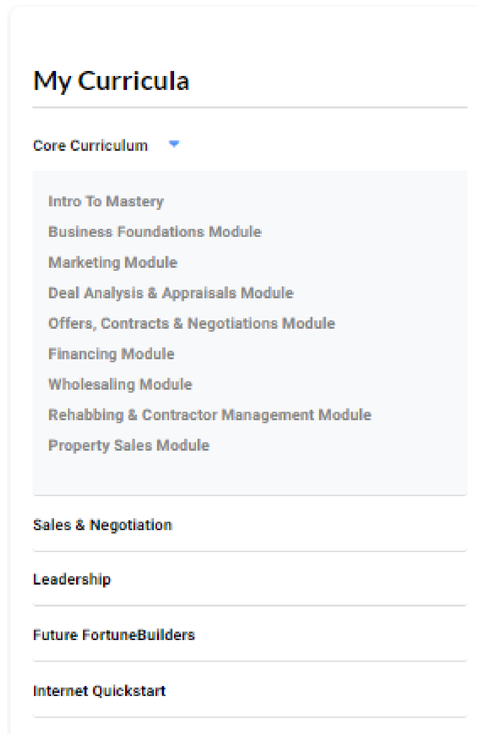
The Learning Window allows you to browse courses to find the course you'd like to watch.

Learning Window Content Overview

The Learning Window will display content based on your selection in the Learning Navigation Menu.

My Curricula Overview

The My Curricula menu allows you to switch between curricula included in your program.



My Curricula Details

The information displayed in the My Curricula section includes:

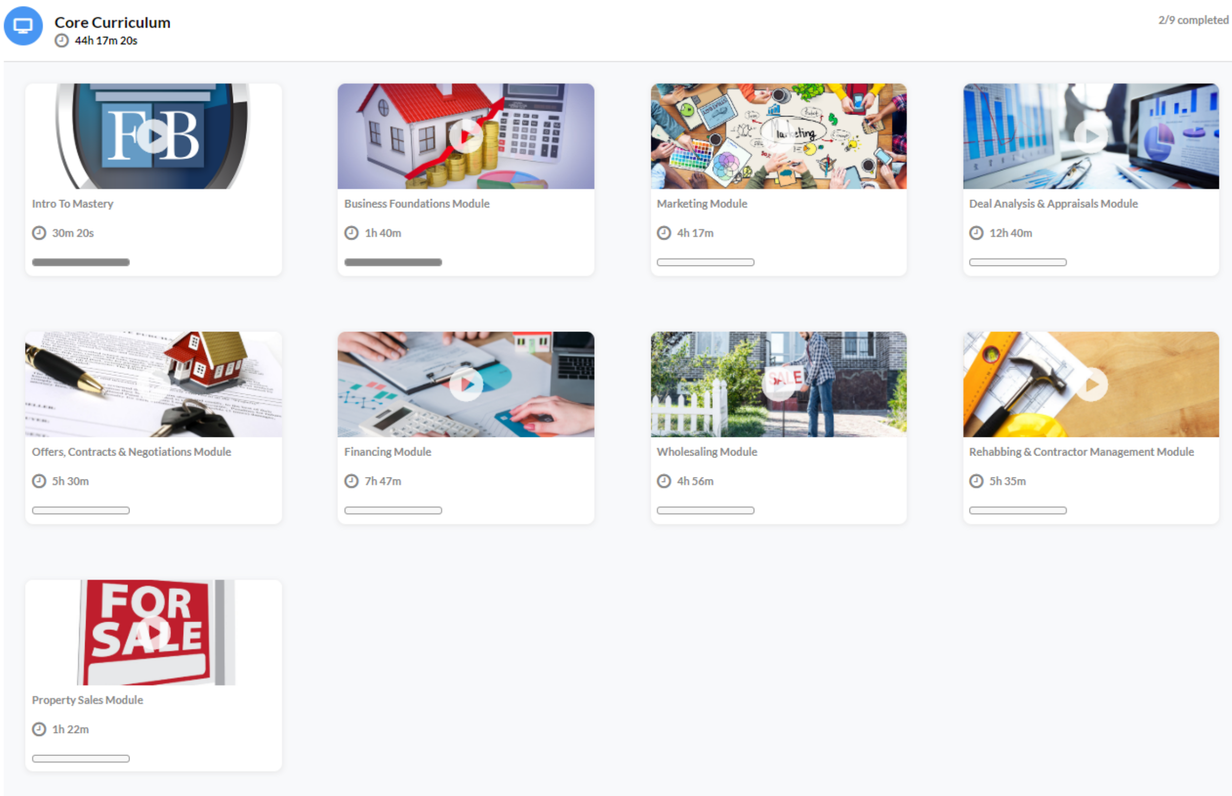
- **Curriculum Title**– The name of the curriculum.

- **Module/Course Title -** The name of a module or course within the curriculum.

My Curricula Features

- **Action**– Clicking on the curriculum title will both load the specific curriculum's module or detailed course list view, as well as loading an expanded menu with the modules/courses contained within the curriculum.

Core Curriculum Details



The information displayed in the Core Curriculum section includes:

- **Curriculum Title** – The Title of the curriculum is displayed at the top of the learning window.
- **Curriculum Icon -** A colored icon will display next to the curriculum title.
- **Curriculum Length-** Displays the length of the curriculum in hours, minutes, and seconds, along with a corresponding curriculum length icon.
- **Curriculum Progress Tracker**- Your progress in the Core Curriculum is displayed as a count of completed modules out of the total number of modules in the Core Curriculum.
- **Module List** - Each module within the Core Curriculum will be listed. Clicking on a module's featured image brings you to the module page.

Things to Note

- The curriculum layout is responsive and will adapt to the size of the screen of the device that you are using.

- Only the Core Curriculum will show the module view - all other curricula will show a detailed course view.

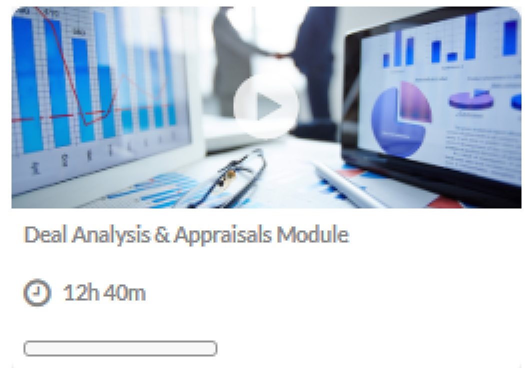
Module Cards

Each card represents a module within the Core Curriculum. Users can click on a card to access the associated content.

Module Card Details

The information displayed on cards include:

- **Featured Image** – The featured image set on the module or course.
- **Title** - The name of the module or course.
- **Length**– The amount of time it will take to complete the module or course videos.
- **Progress Bar** – The progress bar displays the number of courses/lessons completed within the module.



Module Card Features

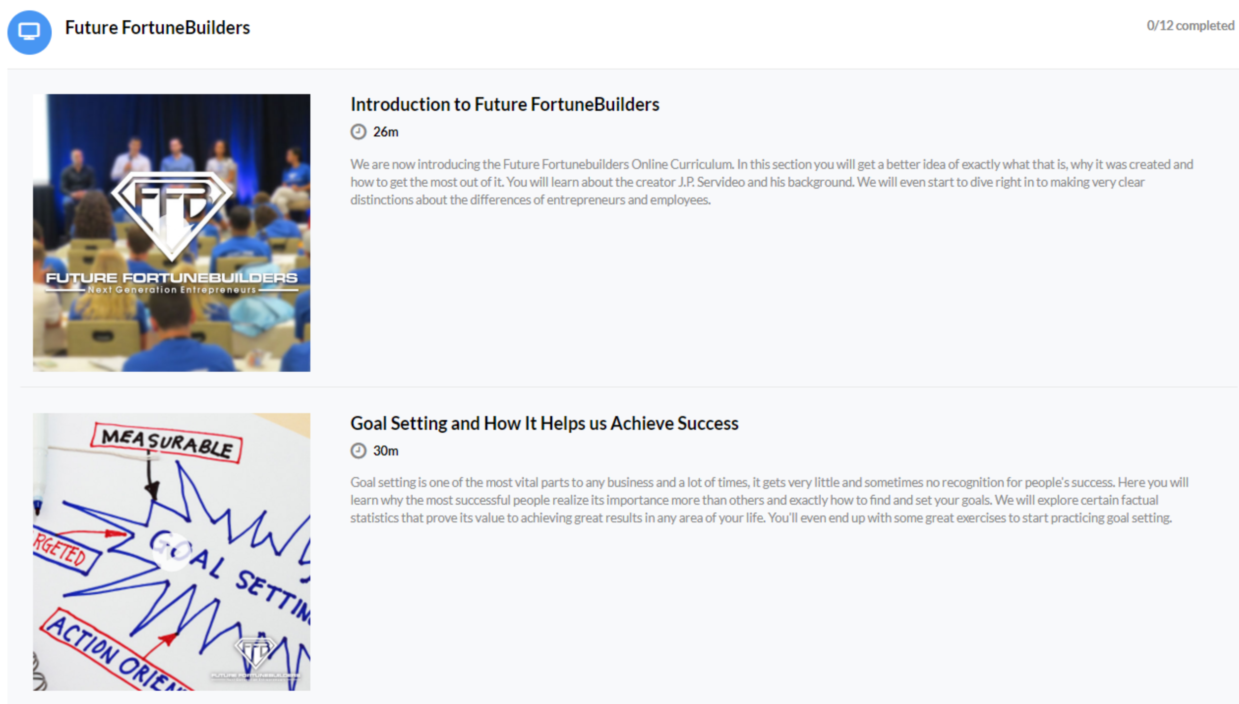
- **Action** - Upon clicking a card, you will be redirected to the detailed course list view.

Things to Note

- This view only displays for curricula that include modules, e.g. Core Curriculum. Any curricula that do not contain modules will display the detailed course list view.

Detailed Course List Overview

The detailed course list view displays a series of related courses with a variety of content including a featured image, title, duration, completion status and description. This view will display for individual modules, as well as curricula that do not contain modules.



Detailed Course List View Details

The following details are included in the course list:

- **Featured Image** – The featured image is an image attached to the course.
- **Title** – The name of the course.
- **Description** – A short blurb describing the contents of each course.
- **Completion Indicator -** A green checkmark icon along with a completed notification will display if you have successfully completed a course.

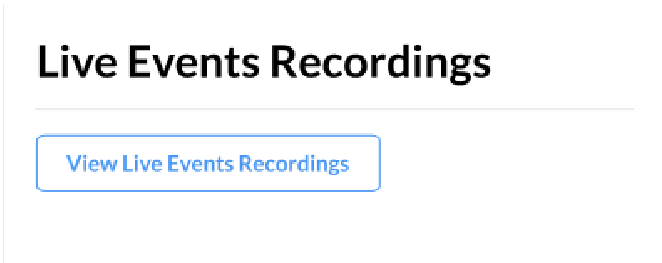
Detailed Course List View Features

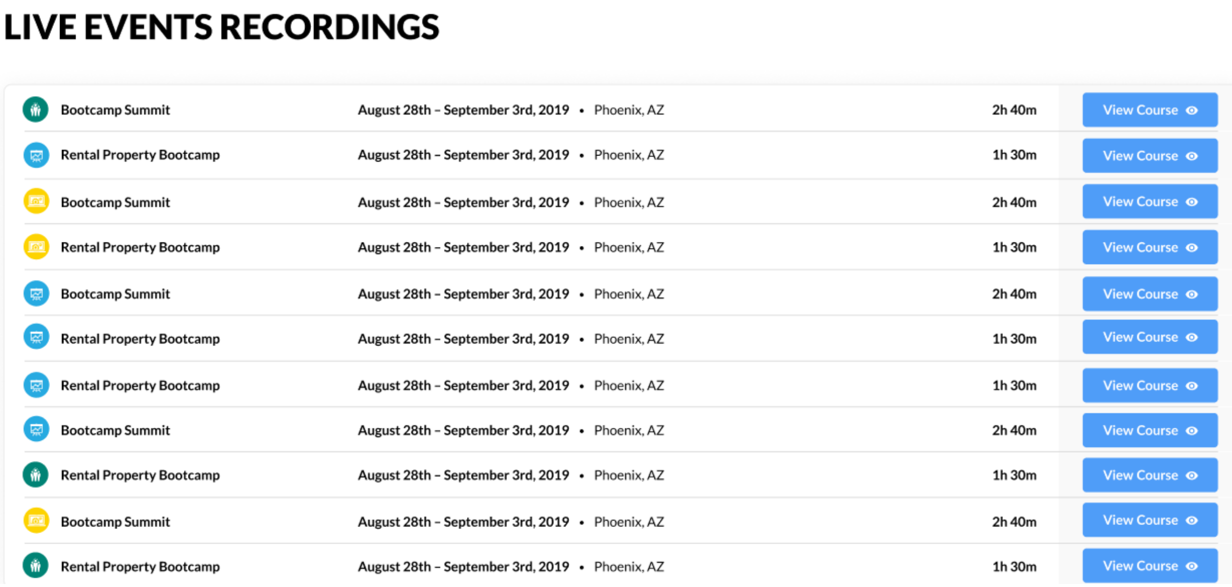
- **Action** – Clicking on the featured image for the course will take you directly to the course page.

[Jump to Course View]

Live Events Recordings Overview

The Live Events Recordings features a button that brings you to Live Events Recordings within the Live Events page.




LIVE EVENTS RECORDINGS

Bootcamp Summit	August 28th – September 3rd, 2019 • Phoenix, AZ	2h 40m	View Course
Rental Property Bootcamp	August 28th – September 3rd, 2019 • Phoenix, AZ	1h 30m	View Course
Bootcamp Summit	August 28th – September 3rd, 2019 • Phoenix, AZ	2h 40m	View Course
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Bootcamp Summit	August 28th – September 3rd, 2019 • Phoenix, AZ	2h 40m	View Course
Rental Property Bootcamp	August 28th – September 3rd, 2019 • Phoenix, AZ	1h 30m	View Course

Live Events Recordings Details

The information displayed in the Live Events Recordings section includes:

- **Recording Title**– The name of the recorded live event.
- **Event Type Icon -** A color-coded icon that indicates the type of live event.
- **Location -** The location of the live event.
- **Length** - The length of the live event recording.
- **View Course Button -** Takes you to the course page for the recording.

Live Events Recordings Features

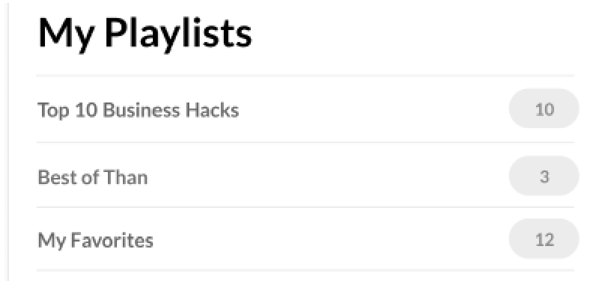
- **Action**– Clicking on the View Course button will bring you to the course page for the recording where you can watch and complete the course.

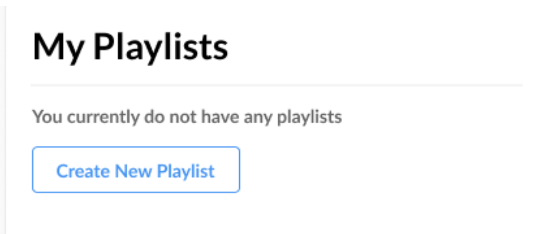
Things to Note

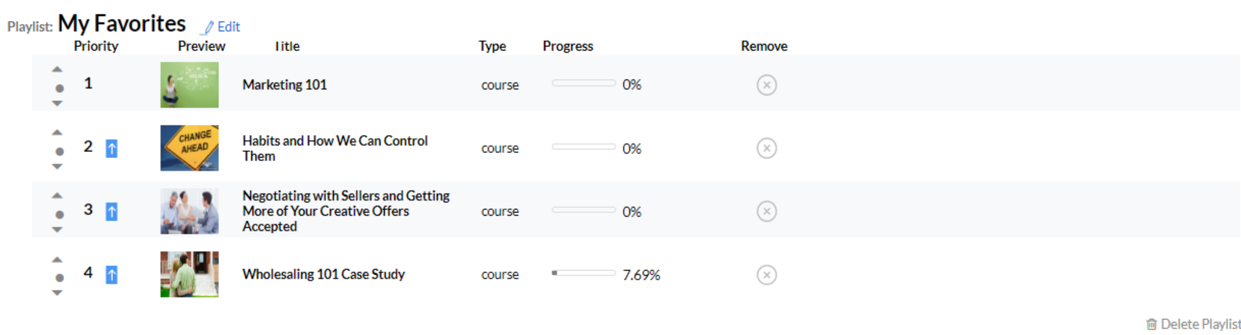
- This section will only show if live event recordings are included in your program.

My Playlists Overview

The My Playlists menu allows you to interact with any courses or lessons you've added to playlists. Clicking on a playlist title loads the playlist where you can view and edit the playlist. If you haven't created any playlists, a Create New Playlist button will appear, along with a message letting you know you don't have any playlists.







My Playlists Details

The information displayed in the Playlist section includes:

- **Playlist Title**– The name of the playlist.
- **Priority -** The order in which courses/lessons are displayed in the playlist.
- **Preview -** The featured image set for the playlist course/lesson.
- **Title -** The name of the course/lesson.
- **Type -** The type of learning content (course or lesson).
- **Progress Bar -** Displays your progress in the course or lesson, based on the number of lessons (for courses) or videos (for lessons).
- **Remove -** Removes the course/lesson from the playlist when clicked.

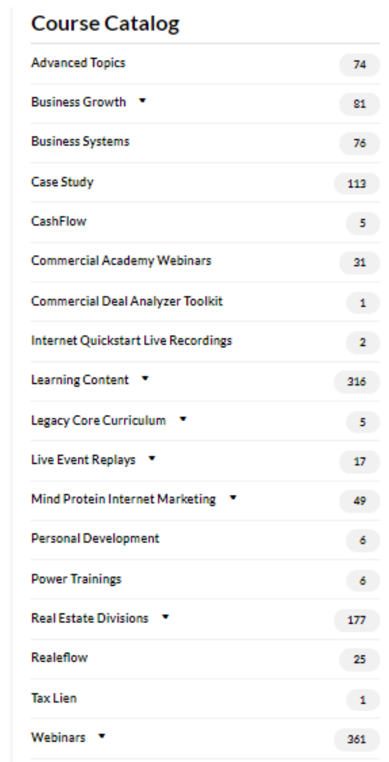
My Playlists Features

- **Action: Edit** – Clicking on the edit option will allow you to edit the name of your playlist.

- **Action: Preview -** Clicking on the preview image will load the course in the course view.
- **Action: Priority** - Allows you to re-order the display of courses/lessons in the playlist.
- **Action: Remove** - Removes the course/lesson from the playlist.

Course Catalog Overview

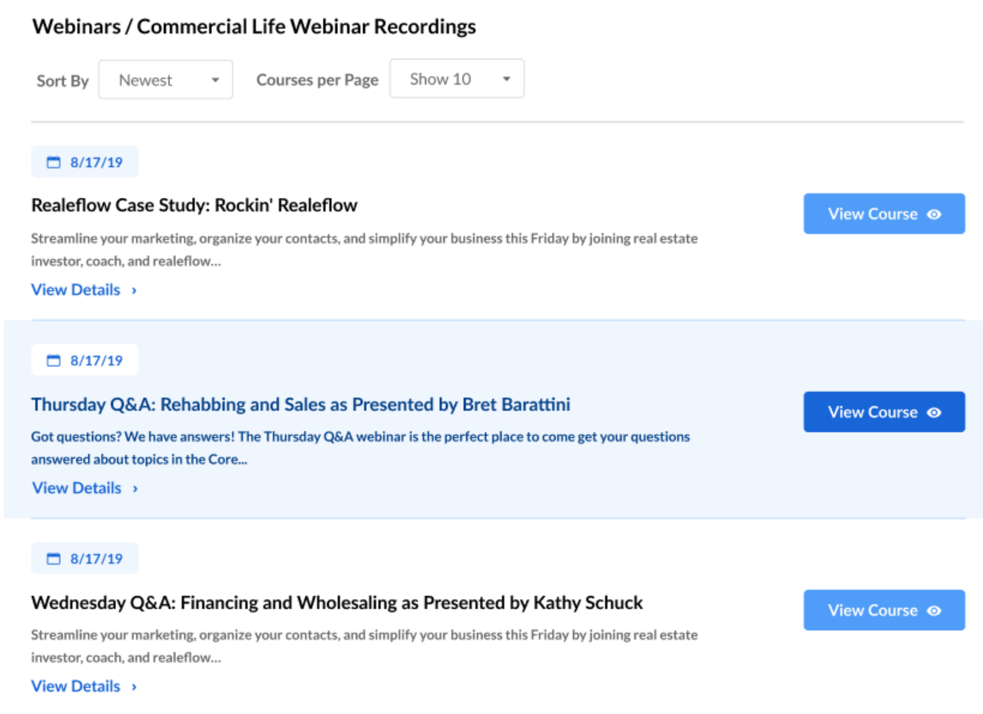
The Course Catalog allows you to browse and view all courses. This includes both elective courses and courses within curricula. You can access the various catalog categories directly from the Learning menu.



Course Catalog Menu Details

The information displayed in the Course Catalog menu includes:

- **Category -** Courses are grouped together by topic, as well as learning content type. Clicking on a category will display it in the main Learning window.
- **Course Count** - The number of courses within the category.



Course Catalog Details

The information displayed in the Course Catalog includes:

- **Category -** The selected category will display at the top of the learning window.
- **Sort By -** The list of courses is sorted by date by default. The most recently published courses will display first. This can be changed by selection from the drop-down menu.
- **Courses Per Page** - You can change the number of courses displayed per page using the Courses Per Page drop-down menu.
- **Publish Date** - The date that the course was published in the LMS.
- **Course Title** - The name of the course.
- **Description -** A short blurb describing the contents of the course.
- **View Course Button -** Clicking the View Course button will load the course view for the content in the main learning window.

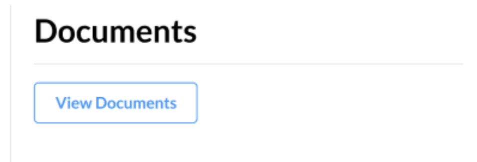
Course Catalog Features

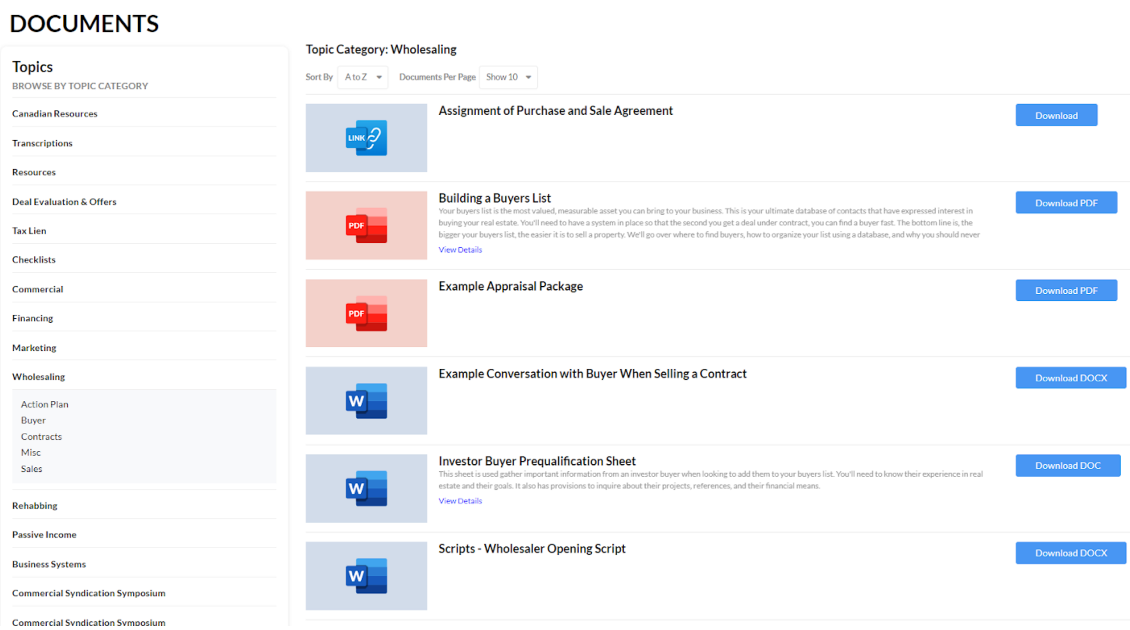
- **Hover**– Hovering over the course in the learning window will highlight the course.

- **Action: View Details** - Clicking the View Details link will expand the description of the course fully. A View Less option will become available once the description is expanded.

Documents Overview

The Learning page features a View Documents button which brings you to a page where you can browse and download documents related to your program.





Documents Page Overview

The Documents page groups documents together by category. Each category is then further broken down into topics.

Documents Details

The information displayed in Documents includes:

- **Topics Menu**
  - Category - Topics are bundled together in categories, which distinguish what content the documents relate to.
  - Document Count - A numbered count of documents within a category.
  - Topic - Categories are further broken down into granular topics which distinguish what topic the documents relate to.
- **Documents List -** Clicking on a topic within the topics menu will list all documents contained within the topic.

- Category - The category for the selected topic will show at the top of the documents list.
- Sort By - Topic documents can be sorted alphabetically, in either descending or ascending order.
- Documents Per Page - Changes the number of documents displayed per page in the documents list.
- Document Type Icon - Displays the file type of the document with a color-coded icon.
- Document Title - The name of the specific document.
- Description - A short blurb describing the contents of the document.
- View Details - If the description is longer than the default character count, clicking View Details will expand the description fully. Once expanded, link changes to View Less.
- Download Button - Blue-colored button that downloads the document to your computer/device. Document file type will also be listed.

Documents Features

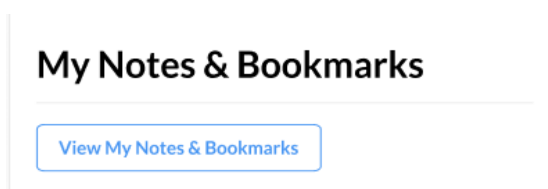
- **Expand/Collapse**– Clicking on a category will expand/collapse a list of topics under the category.

My Notes & Bookmarks Overview

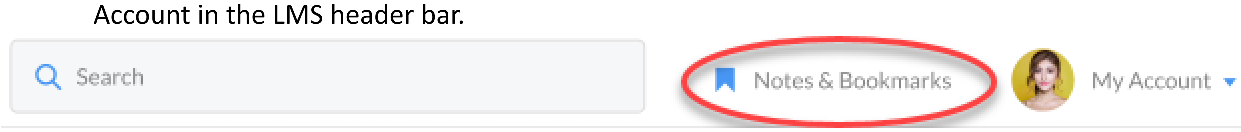
The My Notes & Bookmarks page is split into two sections: My Notes and My Bookmarks.

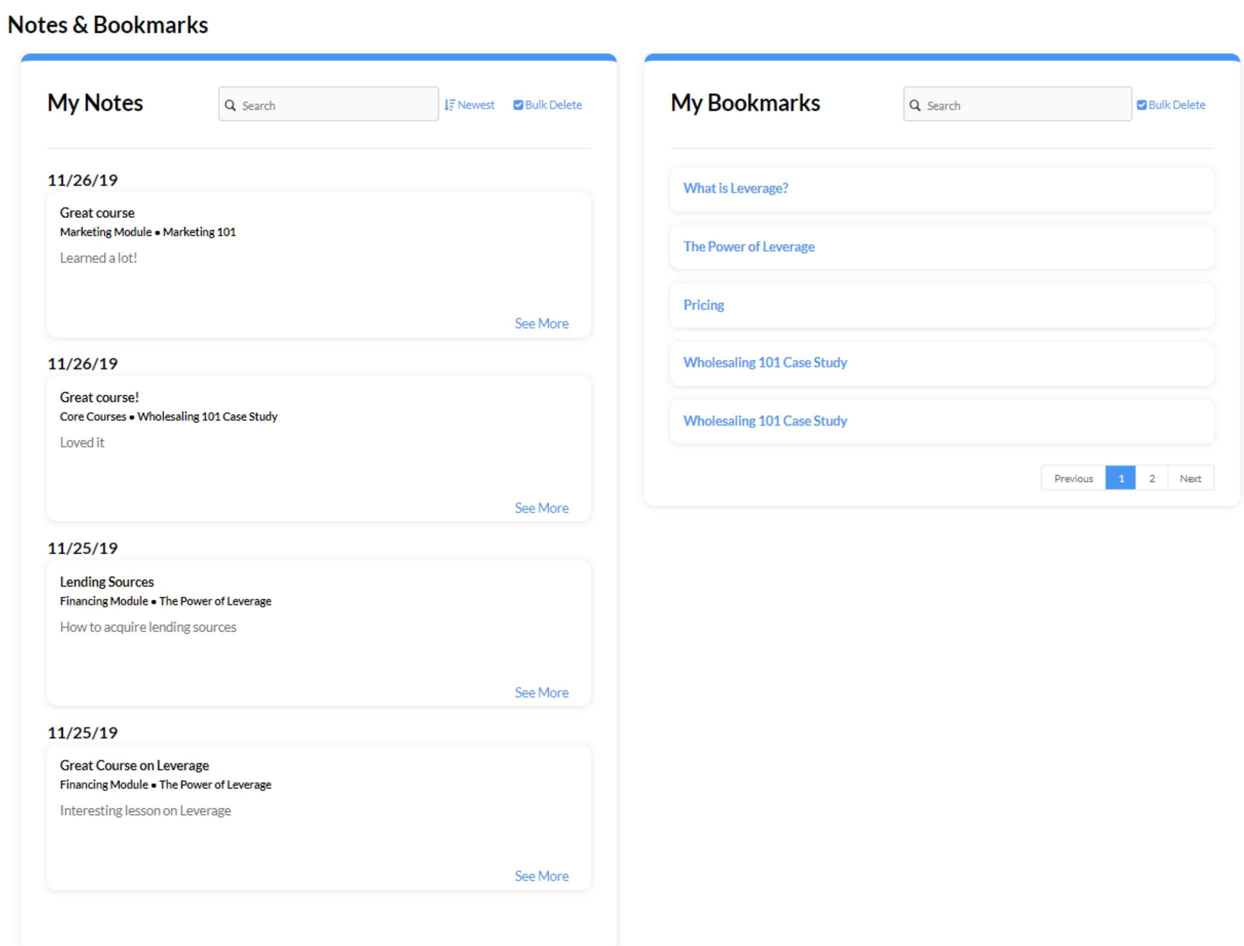
My Notes & Bookmarks Access

You can access My Notes & Bookmarks by:



- Clicking on the View My Notes & Bookmarks button from the Learning Menu.
- Clicking on the Notes & Bookmarks link to the left of My Account in the LMS header bar.





My Notes & Bookmarks Details

The information displayed in My Notes & Bookmarks includes:

- **My Notes -** Compiles and displays any notes you've taken associated with courses and lessons.
  - Search Box - allows you to quickly search and find notes by note title, module, course, lesson, or description.
  - Sort - Clicking on the Newest link changes the display of notes from newest first to oldest first.
  - Bulk Delete - Allows you to select multiple notes for deletion. Once the note(s) are selected, you can click Delete to remove them from your My Notes section.
  - Date - Notes are categorized by the date the note was entered in the LMS.
  - Note Title - The name of the note that was entered upon note creation.

- Module/Course - The module or course the note is attached to.
- Note Body - The contents of the note. If the note is longer than the default character limit, a See More link is available which expands the note and allows you to edit the note.

- **My Bookmarks -** Compiles and displays any courses/lessons you've bookmarked.
    - Search - allows you to quickly search and find bookmarks.
    - Bulk Delete - Allows you to select multiple bookmarks for deletion. Once the bookmark(s) are selected, you can click Delete to remove them from your My Bookmarks section.
    - Bookmark - Lists the course or lesson that you've bookmarked. Clicking on the bookmark will take you to the course/lesson in the course view.

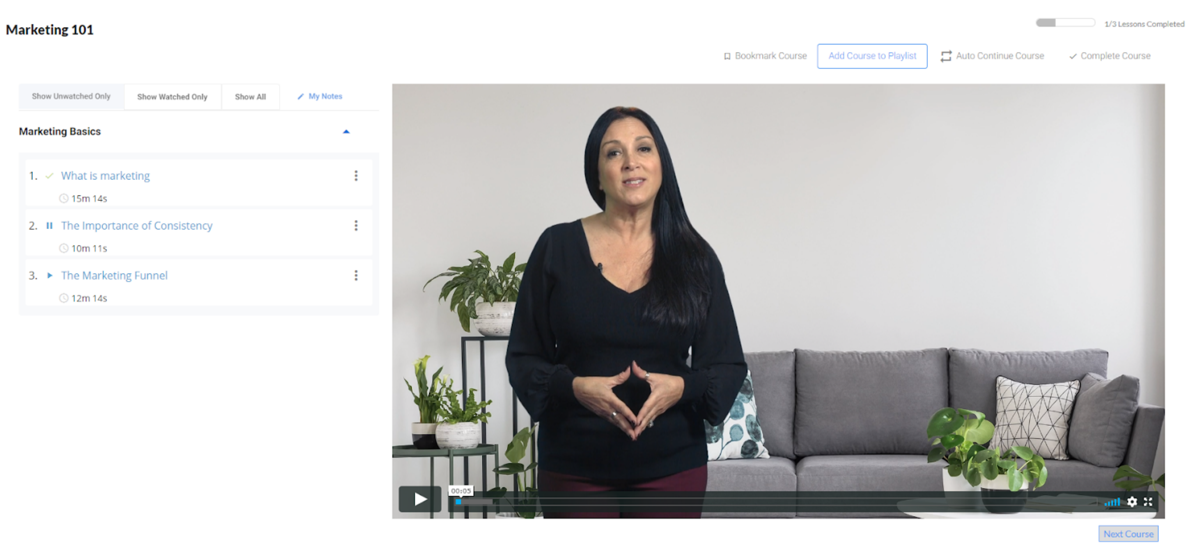
Things to Note

- The Notes & Bookmarks page differs from notes on the Coaching tab. Notes & Bookmarks relates to learning content, while coaching notes relate to notes from coaching calls, support, and onboarding.

Course Layout Overview

A course is a collection of chapters and lessons that cover a single discrete topic (e.g. Gathering Property Information from Sellers).

The course layout consists of the following sections: Course Options Bar, Course Content List, Course Video, Course Resources Tab, and Related Electives.



Return Option

An option to return to the curriculum or module is available as a breadcrumb link at the top left of the course page, above the course title.

Course Progress Bar

A course progress bar is available at the top right-hand side of the course page. The progress bar displays the number of lessons completed in the following format: **XX/XX Lessons Completed**.

Things to Note

- The Course Progress indicator will automatically update as lessons are marked as complete.

Next Course

The ‘Next Course’ button allows you to manually proceed to the next course. It is displayed below the video player.

Things to Note

- If you prefer the system to automatically redirect you to the next course, you can enable the Auto Continue feature. The Auto Continue feature will automatically redirect to the next course in a series once the current course is complete. Additional information is available below.

Course Options Bar

The Course Options Bar provides the ability to perform functions and manage preferences on a course. The options bar is displayed in the top-right hand corner of the course page.

Bookmark Course

The Bookmark Course option allows you to add or remove the current course to your list of bookmarks.

Toggle the Bookmark Course Option

By default, a course will <u>not</u> be bookmarked inside of your account. To bookmark a course, click on the Bookmark Course option.

- If a course is not bookmarked, then the icon will not be filled and text will be in blue. *Example of how the option looks when a course is <u>not</u> bookmarked:*

- If the course is bookmarked then the icon will be filled and text will be displayed in light blue. *Example of how the option looks when a course **is** bookmarked:*

Reminder: Courses that are bookmarked will be displayed on the 'My Notes and Bookmarks' page of your account.

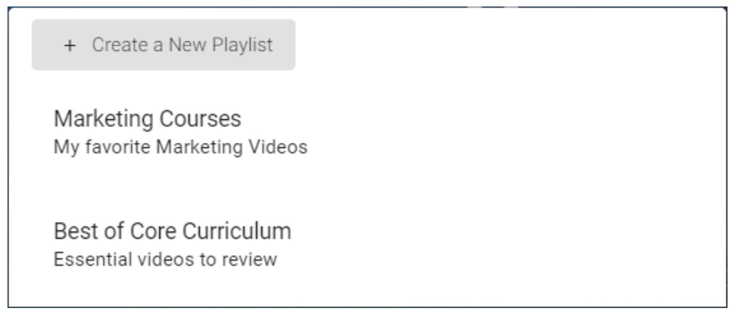
Add Course to Playlist

The Add Course to Playlist option allows you to add the current course to a new or existing playlist.

Toggle the Add Course to Playlist Option

By default, courses are <u>not</u> included in your playlists until they are added manually. To add a course to a playlist, click on the Add Course to Playlist option.

A popup window will appear from the bottom of the screen with the option to Create a New Playlist or select an existing playlist to add the course to.



The following details are shown for each playlist listed:

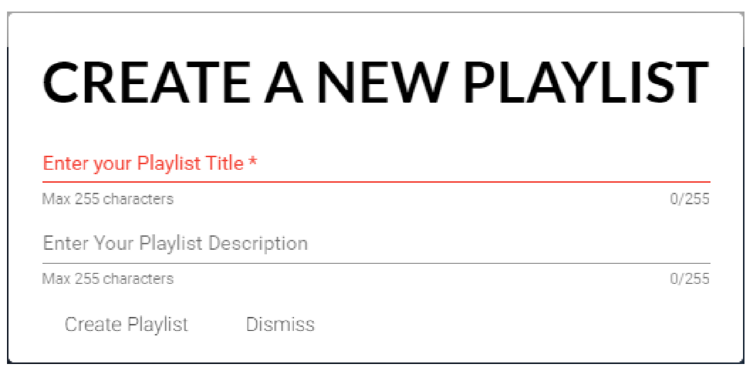
- **Playlist Title** – The name of the playlist.
- **Playlist Description** – The description of the playlist.

Create a New Playlist

To add a course to a new playlist, click the 'Add Course to Playlist' option and select the 'Create a New Playlist'.

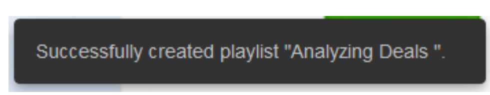
A new window will show with the option to add the details for your new playlist:

- **Playlist Title** – The name of the playlist.
- **Playlist Description** – A description of the playlist that will serve as a reminder of the contents.



Once the details have been added, click Create Playlist to save the new playlist.

- If the playlist has been successfully created, a confirmation message will be displayed at the bottom of the page.

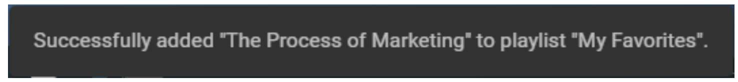


- If there was an error adding the course, an error message will be displayed in the same format.

Add Course to Existing Playlist

To add a course to an existing playlist, select the name of the playlist to add the course to.

- If the course has been successfully added, a confirmation message will be displayed at the bottom of the page.



- If there was an error adding the course, an error message will be displayed in the same format.

Things to Note

- There will not be any visual indicator at the Options Bar level that will indicate that a course is a part of a playlist (e.g. the option will <u>not</u> turn green or blue like other options).
- You can access your playlists by clicking on Learning in the Quick Navigation Menu, then selecting your playlist in the learning menu.

Auto Continue Course

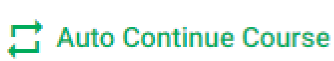
The Auto Continue Course option will automatically redirect you to the next course within a module or curriculum.

Toggle the Auto Continue Option

By default, a course will <u>not</u> be set to Auto Continue. To toggle this feature, click on the option:

- If the Auto Continue option is disabled, then the icon and text will be in blue. *Example of how the option looks when it is inactive:*

- If the Auto Continue option is disabled, then the icon and text will be displayed in green. *Example of how the option looks when it is active:*



Important Notice Regarding Auto Continue

Major web browsers like Chrome, Firefox and Safari have started to disable auto-play videos by default.Due to web browser auto-play policies, the Auto Continue feature does not necessarily mean that the course will automatically start playing when the system proceeds to the next course.

When a video finishes on the LMS, the system will proceed to the next lesson within a course. However, whether that next lesson plays depends on your browser auto-play settings.

Complete Course

The Complete Course option allows you to manually mark a course as complete.

Toggle the Complete Course Option

By default, a course will not be marked as complete. To toggle this option, click on the Complete Course option:

- If the course is marked as incomplete, then the icon and text will be in black. *Example of how the option looks when the course is incomplete:*

- If the course is marked as complete, then the icon and text will be displayed in green. *Example of how the option looks when the course is complete:*

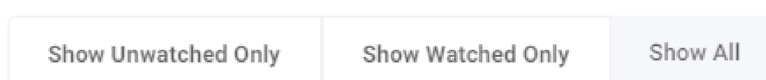
  

Course Content List

The Course Content List contains all the chapters and lessons included in the current course. Additional options are available for each lesson displayed in the Course Content List.

Content Filter

The content filter provides the option to filter the displayed chapters and lessons:



- **Show All** – Display all chapters and their respective lessons, regardless of whether they have been watched.
- **Show Watched Only** – Display only the chapters and lessons that have been watched.
- **Show Unwatched Only** – Display only the chapters and lessons that have not been watched.

Chapter List

Chapter titles will be displayed with all the lessons within that chapter displayed below.

Toggle the List

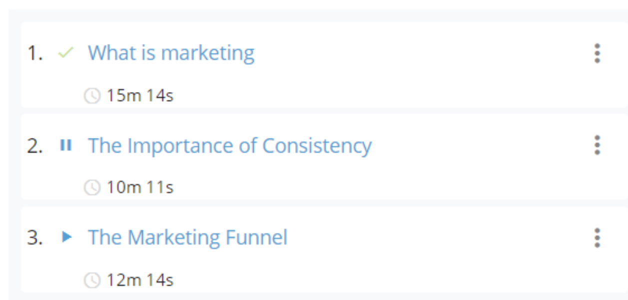
The name of a chapter can be clicked to toggle the option to expand or collapse the list of lessons under a chapter.

- If the chapter is collapsed, – and lessons within it are <u>not</u> shown – a carrot icon will appear on the right of the chapter name. *Example of how the option looks when the chapter is collapsed:*

- If the chapter is expanded, – and lessons within it <u>are</u> shown – an inverted carrot icon will appear on the right of the chapter name. *Example of how the option looks when the chapter is expanded:*

Lesson Details

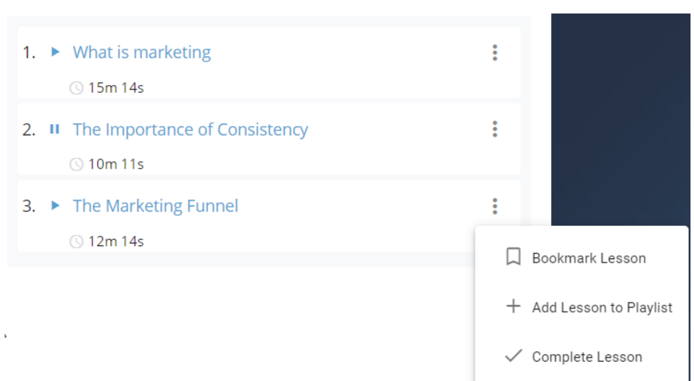
- **Lesson Titles** – The name of each lesson within a chapter.
- **Lesson Duration** – The duration for each lesson is displayed in **XX**h **XX**m **XX**s format.
- **Play / Pause / Complete Lesson** – An icon is displayed next to each lesson to indicate one of the following statuses:
    - **Play** – The play icon indicates that the video is ready to play and/or has not been marked as complete.
    - **Pause –** A pause icon shows when the lesson video is actively playing.
    - **Complete** – A checkmark is shown if a lesson has been marked as complete.



Lesson Actions

The following actions can be performed on each individual lesson within a course:

- **Bookmark Lesson** – Add the specified lesson to the list of bookmarks within the account.
- **Add Lesson to Playlist** – Add the specific lesson to a new or existing playlist.



- **Complete Lesson** – Manually mark the specified lesson as complete.

Things to Note

- If a lesson has been bookmarked or marked as complete, the respective text will be in green or blue (like the course-level options).

My Notes

The My Notes section allows you to document ideas and important highlights while watching a specific lesson within a course.

My Notes Details

Under the My Notes section, you will see a list of all existing notes on the current lesson, along with an option to add a new note.

Things to Note

- Notes are attached to lessons, not the course. If you add a note while watching lesson A, you will not see that note when viewing lesson B.

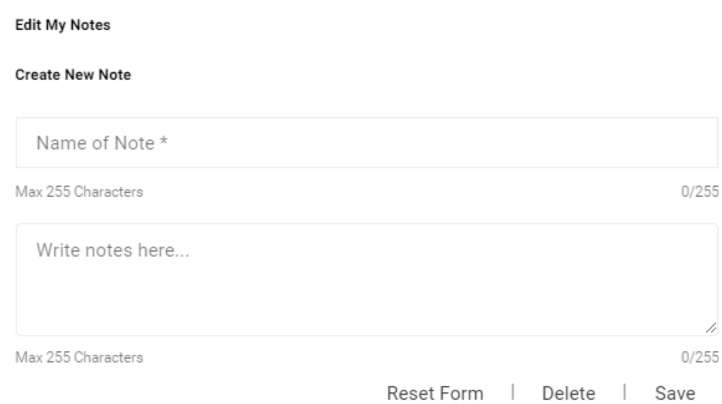
- All notes added can be viewed on the My Notes and Bookmarks page of your account. This can be accessed through the Learning Menu, or through the top ribbon of the LMS.

Create New Note

To create a new note, click the My Notes option and then enter the note details:

- **Name of Note** – Enter the name of the note that is being added.

- **Write notes here…** – Add the contents of the note.



Available Actions

The following options are available:

- **Reset Form** – Click this option to clear all the content entered. *Note: This option can be used if you select an existing note to edit and later decide to add a new note instead.*

- **Delete** – Delete the new note and its contents.

- **Save** – Press to save any changes.

Edit My Notes

To edit an existing note, click on the name in the list and make the desired changes to the name of the note and the note contents. Once the desired changes have been made, press the Save button.

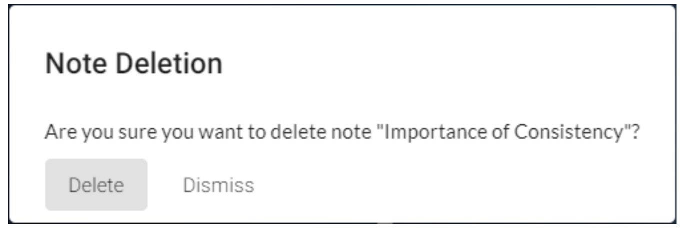
Delete Note

Existing notes can be deleted by selecting the name of the note and pressing the Delete option.

Confirm Note Deletion

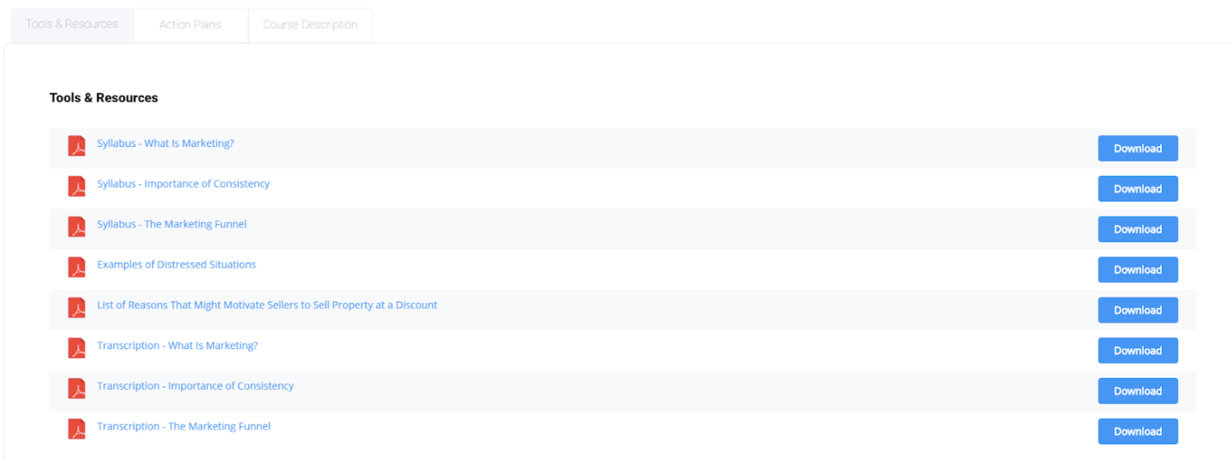
You will be prompted to confirm before the note is deleted from the system:

1. To proceed with the note deletion, press Delete.
2. To cancel the deletion process, press Dismiss.



Course Information Tabs

The Course Information Tabs contain a variety of important content like Tools & Resources, Action Plans, and Course Description.



Tools & Resources

The Tools & Resources tab contains all the documents and files that are associated with the course, including PDF, Word, Excel, etc.

File Details

The following details are displayed for each document:

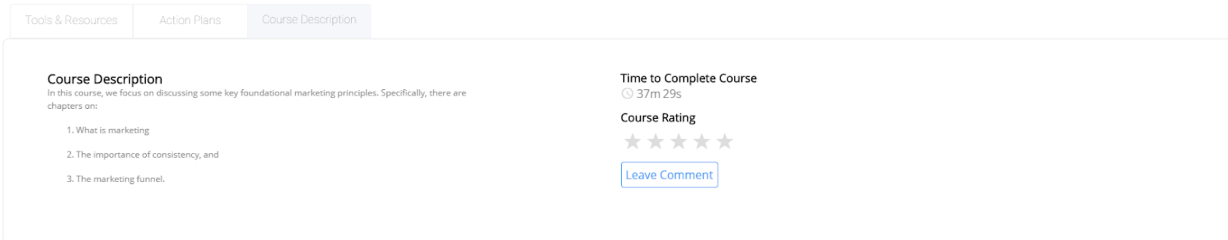
- **File name** – The name of the file.
- **File format** – The format that the file is available in, ie PDF, XLSX, DOCX, etc.

Things to Note

- This system will automatically hide the Tools & Resources section if there aren't any files attached to the course.

Course Description

The Course Description tab shows the course description, time to complete, and the option to complete a survey on the course content.



Course Description
A summary of the course contents and learning objectives of the course.

Time to Complete Course
The time to complete reflects the amount of time it will take for you to watch the course, based on lesson length.

Course Rating
You will see an option to rate a course using a 5-star system, along with an option to Leave a Comment.

- **Star Rating** - To leave a star rating, you can click on the star to log their review.

- **Leave Comment** – A new window will be launched upon clicking the Leave Comment option, presenting you with a questionnaire to complete in order to leave a comment.

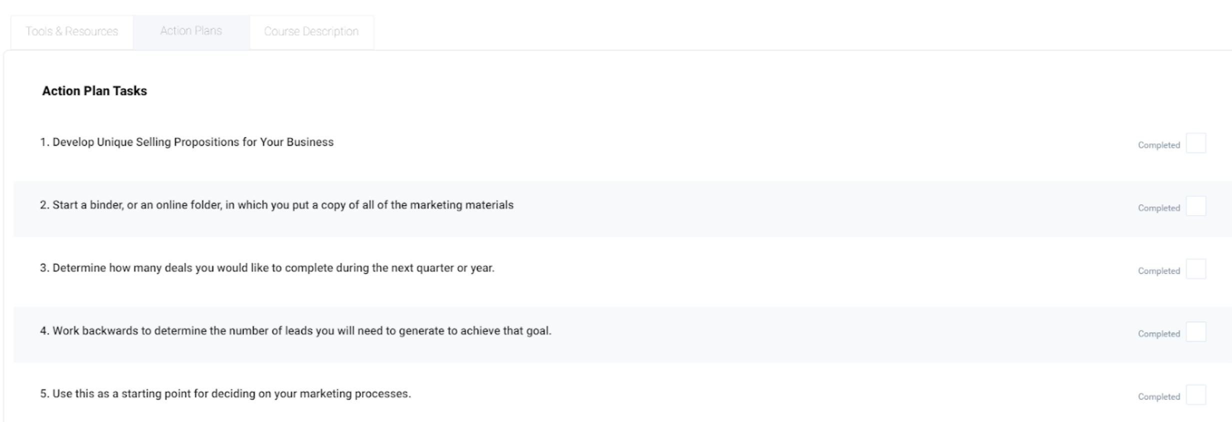
Action Plans
All tasks associated with a course can be found under the Action Plans tab.

Action Plan Details
The following details are displayed for Action Plans:

- **Action Plan Task** – The Action Plan task is the activity that you will complete.

- **Action Plan Description** – The description provides additional details about the Action Plan task. A ‘View More’ option is available to expand the description in full.

- **Action Plan Status** – A checkbox is available to mark an Action Plan as complete.

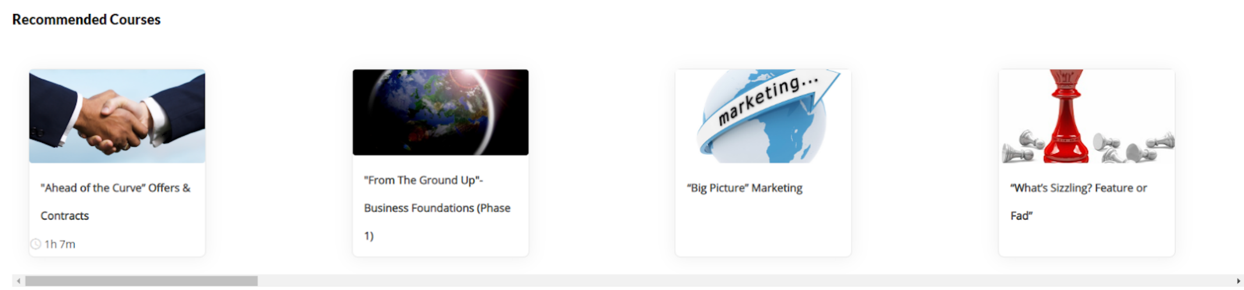


Things to Note

- This system will automatically hide the Action Plans section if there aren't any action plans attached to the course.

Recommended Courses

The Recommended Courses section displays elective courses that are in the same category as the current course.



Things to Note

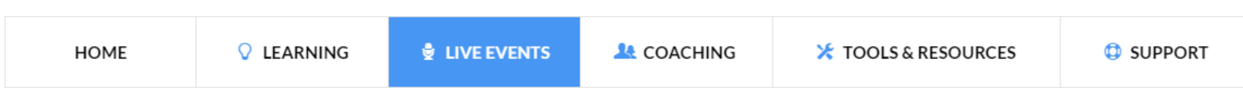
- The Recommended Courses section is only displayed on Core Curriculum courses.
- The Recommended Courses section is <u>not</u> displayed on elective courses or trainings, i.e. live webinar recordings, live event recordings, etc.

Live Events

The live events page is where you can view and register for upcoming live events, as well as view and manage your upcoming live events (events you're registered for).

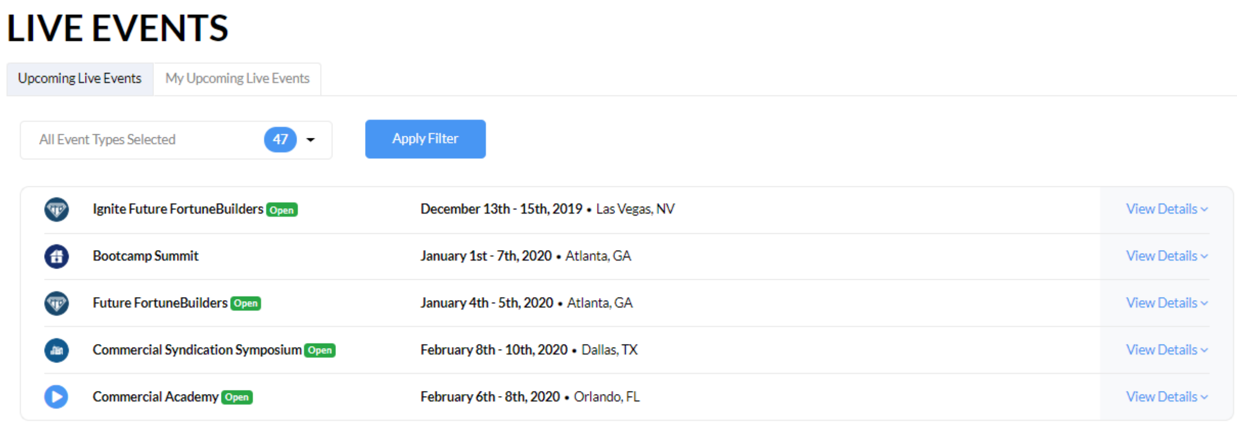
Live Events Access

To access the live events page, click on Live Events from the Quick Navigation bar on the Dashboard.



Live Events Page Overview

This page contains two sections: Upcoming Live Events, and My Upcoming Live Events.



Upcoming Live Events

Upcoming Live Events Details

The information displayed in Upcoming Live Events includes:

- **Event Type Filter** – Drop-down menu that allows you to filter the view of upcoming live events to a specific type.

- **Event Icon** - A small circular icon to the left of the event name which corresponds to the event type.

- **Event Name** - The name of the event.

- **Event Date/Location** - Shows the start/end date of the event, as well as the city and state it takes place in.

- **View Details** - Expands the event view to show details of the event.

Upcoming Live Events Features

- **Action: Play Icon**– If a video is attached to the event, the image icon is replaced by a clickable play icon which opens the video in a pop-up window.

- **Action: Event Type Filter** - Clicking the Apply Filter button will change the view of events depending on your selections.

- **Action: View Details** - Clicking the View details link will show the detailed event view.

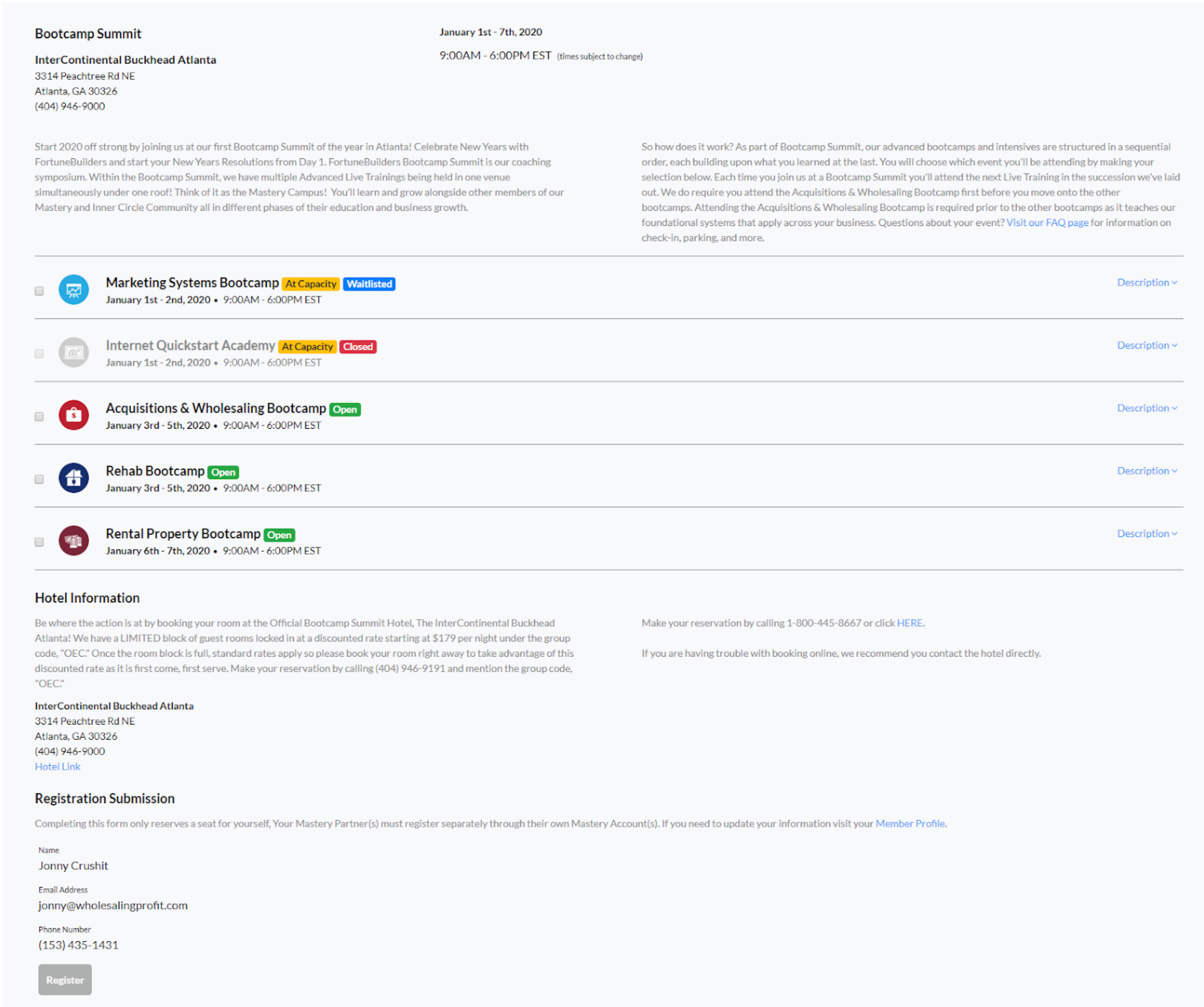
Things to Note

- If only one event is displayed, the section will expand to include the event details.

- If the single event is a summit, the section will expand to show the summit.

- Not all programs have access to register for live events. If your program does not include this access, the live events page will show live events recordings.

Detailed Event View



The information displayed in the detailed event view includes:

- **Event Name** – The name of the event.
- **Event Date -** The start/end date for the event.
- **Event Time** - The time of the event.
- **Event Location -** The venue for the event, along with its address and phone number.
- **Registration Confirmation** - If you're registered for the event, a green confirmation message will display.
- **Registration Cancellation** - If you're registered for the event, a button appears which will cancel your registration when clicked.
- **Event Video** - A short video promoting the event and its objectives. Not all events have videos.

- **Event Description** - A full description of the event, and what you can expect by attending the event.

- **Individual Event** - If you are looking at a bootcamp summit, each individual event within that summit (e.g. Rental Property Live Event, Acquisitions and Wholesaling Live Event) will be listed under the description section.

    - Individual Event Icon - A colored icon that displays the type of individual event.

    - Individual Event Date - The start/end date for the individual event.

    - Individual Time - The start/end time for the individual event.

    - Individual Event Status - Indicates whether the event is open/closed for registration, at capacity, or waitlisted.

    - Description Drop-Down - Allows you to expand the individual event view to include the full description, as well as any Featured Videos.

    - Registration Checkbox - Allows you to select which individual events to register for.

- **Hotel Information** - Information about the venue for the event, including address, phone number, email, and event-specific venue information.

- **Registration Submission** - Displays a short message that states that the registration is for you as an individual, and any partners will need to register separately. This section also confirms your name, email address, and phone number.

Things to Note

- You will be prompted to enter missing details before you can register for the event (e.g. phone number).

- Only the individual events you have access to will display in the list.

My Upcoming Live Events Details

The same details will apply to My Upcoming Live Events as Upcoming Live Events, but specific to live events you're already registered for.

Things to Note

- This section will only display events you've registered for that have not occurred yet. Once the event passes, it is removed.

Coaching

The Coaching Page is your central source when it comes to booking/managing calls, 1 on 1 Coaching, Group Coaching, and Call Notes.

Things to Note

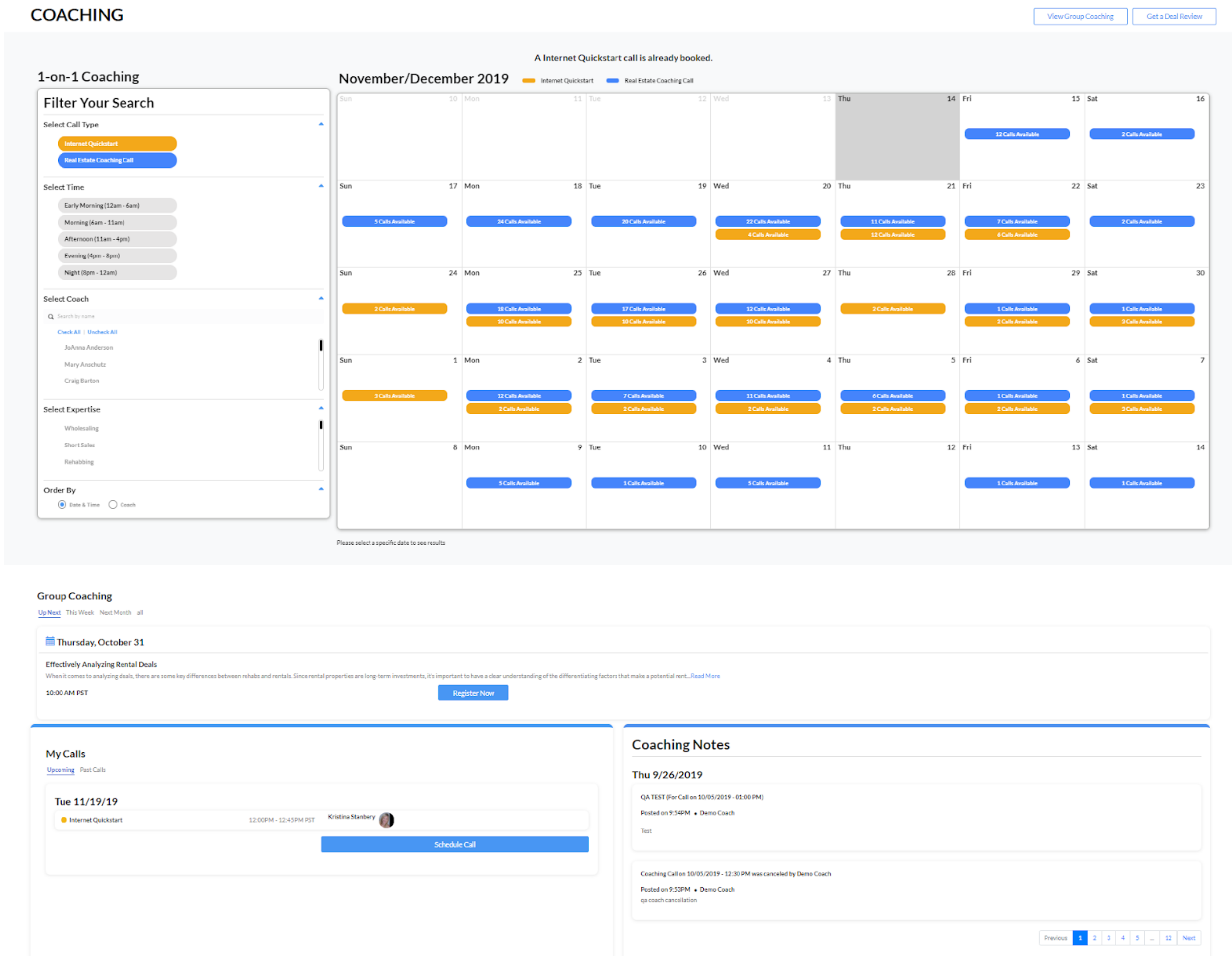
- Not all programs have access to all sections of the coaching page. Your account access may include a combination of 1-on-1 Coaching, Group Coaching, My Calls, and My Notes.

Coaching Access

To access the coaching page, click on Coaching from the Quick Navigation bar on the Dashboard.

Coaching Page Overview

This page contains several sections: 1-on-1 Coaching, Live Webinars, My Calls, and Coaching Notes. We'll review each section in more detail below.



The Coaching Page also contains links to the Group Coaching section, as well as the Deal Review page.

View Group Coaching

Get a Deal Review

1-on-1 Coaching Calendar Overview

The 1-on-1 Coaching Calendar allows you to schedule calls with coaches. The 1-on-1 Coaching Calendar section is further broken down into two subsections: search filters and the calendar view. Search filters directly interact with the call options displayed in the calendar view, allowing you to narrow your search to relevant calls. Each section in the search filters can be expanded/collapsed.

1-on-1 Coaching Search Filter Details

Filters for the 1-on-1 Coaching Calendar include:

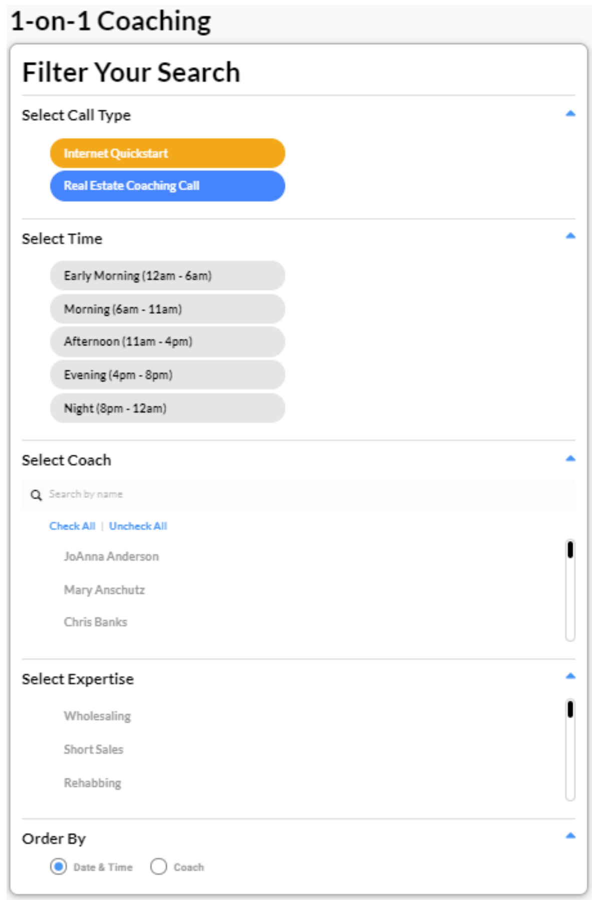
- **Call Type Filter** - Select which call type you want to find availability for.

- **Time Filter** - Search for calls that are available during the following time ranges (all are selected by default):
    - Early Morning (12AM-6AM)
    - Morning (6AM-11AM)
    - Afternoon (11AM-4PM)
    - Evening (4PM-8PM)
    - Night (8PM-12AM)

- **Coach Filter** - Filter the calendar view to display available times for specific coaches.

- **Expertise Filter** - Filter the display of available calls to coaches listing a specific expertise on their coaching profile.

- **Call View Ordering** - Once you select a date and call type from the calendar view, the list of coach call availability can be sorted by:
    - Date & Time (default)
    - Specific Coach



1-on-1 Coaching Features

- **Action: Time Filter** - Clicking on a time window will deselect it. This will automatically update in the calendar view.

- **Action: Coach Filter** - You can search by specific coach in the search box or manually scroll through the list of coaches. You are also able to select/deselect all ilsted coaches using the Check All/Uncheck All options.

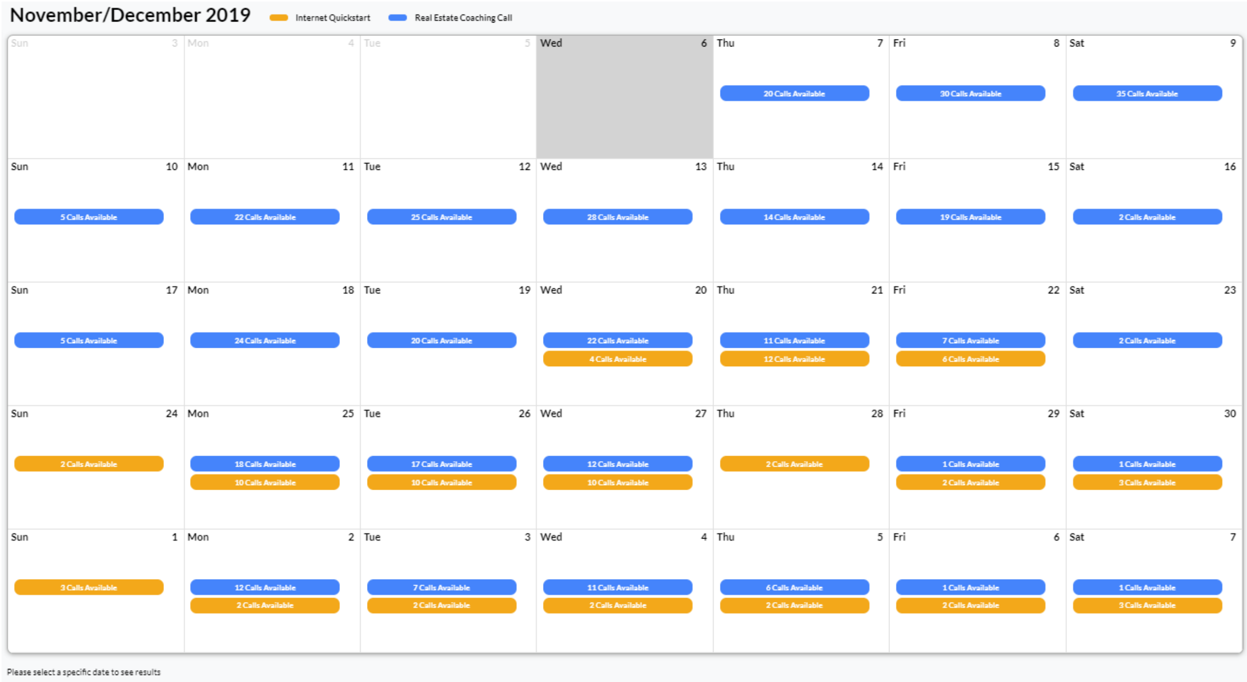
Things to Note

- The call types available in the call type filters are determined by your program (for example Real Estate and Internet Quickstart calls).

- Business and Accountability coaching calls (if they are included in your program) are always scheduled by the coach; they cannot be booked through this view.

1-on-1 Coaching Calendar View Details

The calendar view will display the next 30 calendar days, with each day listing the number of available call slots, organized by color-coded call type. The calendar view will update automatically based on your Filter selections.

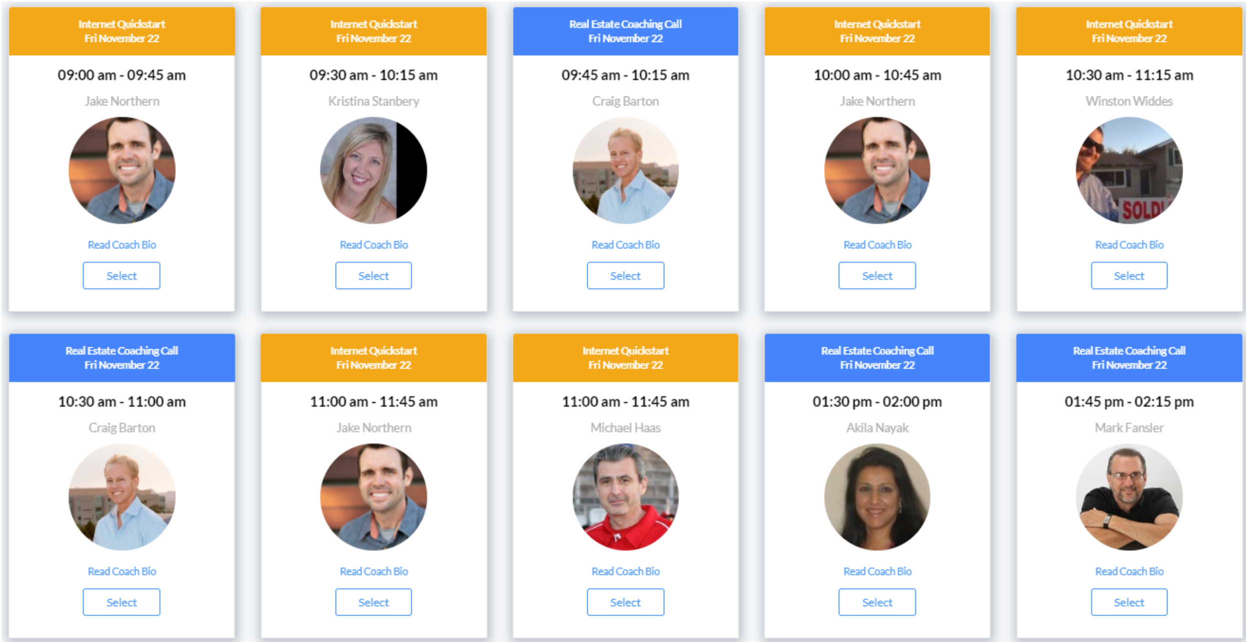


The information displayed in the 1-on-1 Coaching Calendar section includes:

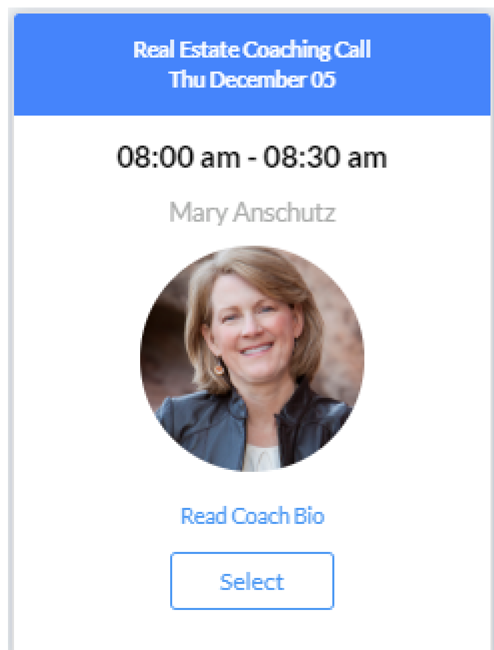
- **Month/Year** - The month(s) and year that the calendar view displays will show above the calendar.
- **Call Type Legend** - Differentiates the color-coded call options within the calendar view.
- **Calendar** - The next 30 calendar days of call availability will be displayed.
- **Call Availability Button** - A color-coded button corresponding to call type, listing the number of available calls on that day.

1-on-1 Coaching Call Availability Details

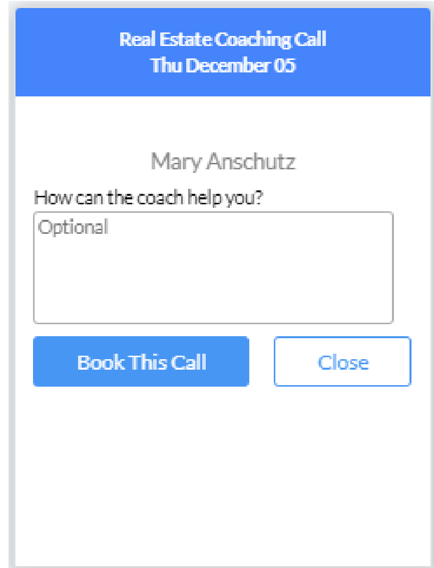
Coach availability is shown in ‘card-style’ format on the Student Calendar.



Each coach availability slot is color-coded based on the call type. The availability card has the following information:



- **Call Type** - The type of call that the card represents.
- **Selected Date** - The date that the call will occur on.
- **Time Slot** - The time that the call will occur on.
- **Coach Name** - The name of the coach.
- **Coach Picture** - A small image/headshot of the coach.
- **Read Coach Bio** - A list of the coach's areas of expertise, and a short biography of the coach.
- **Select Button** - Allows you to proceed with the call booking process for this available spot.

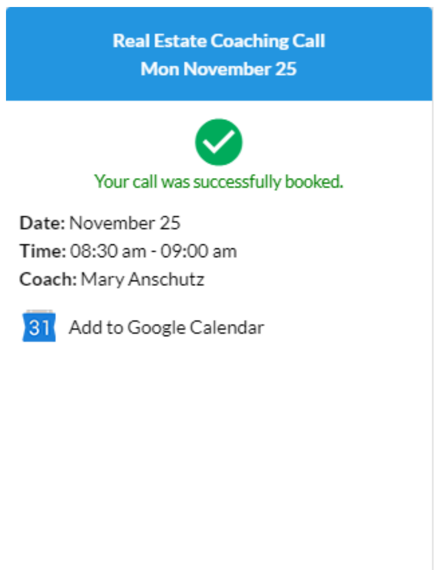


1-on-1 Coaching Calendar Features

- **Action: Select** - Clicking on the Select button will show a prompt where you can book the call. There is an option to include a comment or question for the coach if you have a specific topic that you would like to discuss.

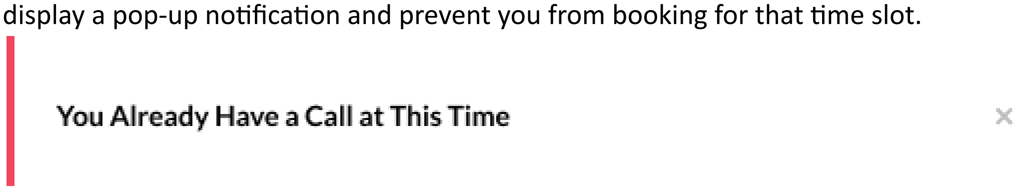
- **Action: Close** - Cancel the option to book the call.

- **Action: Book This Call** - Books the call. Displays a confirmation message with an option to add the call to your Google calendar.



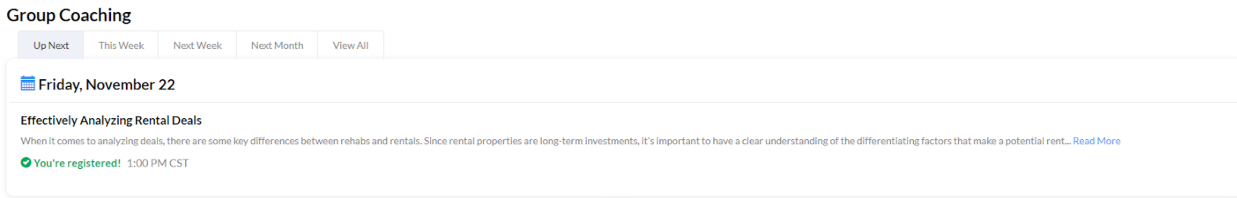
Things to Note

- If you try to book a call during a time slot that you've already booked a call for, the system will display a pop-up notification and prevent you from booking for that time slot.



Group Coaching Overview

The Group Coaching section will allow you to view upcoming group coaching opportunities at a glance.



Group Coaching Details

The information displayed in the Group Coaching section includes:

- **Date Filters**– Changes the display of group coaching webinars by date. Options include Up Next (default), This Week, Next Week, Next Month, and Past Webinars

- **View All** - Brings you to the coaching page where you can view and register for all upcoming group coaching webinars.

- **Date -** Displays a calendar icon with the date of the group coaching webinar.

- **Group Coaching Webinar Title -** The name of the group coaching webinar.

- **Group Coaching Webinar Description -** A short description of the group coaching webinar's content. A Read More link is available to expand the section to see the full description. If expanded, there will be a Read Less option to return to the original description view.

- **Group Coaching Webinar Time Selection** - Displays the start time of the group coaching webinar. If there are multiple attendance options, this will be replaced by a time selection drop-down.

- **Registration Button -** Allows you to register for the group coaching webinar from this section.

Live Webinar Features

- **Registration Confirmation** – Registered group coaching webinars will display a confirmation of registration.

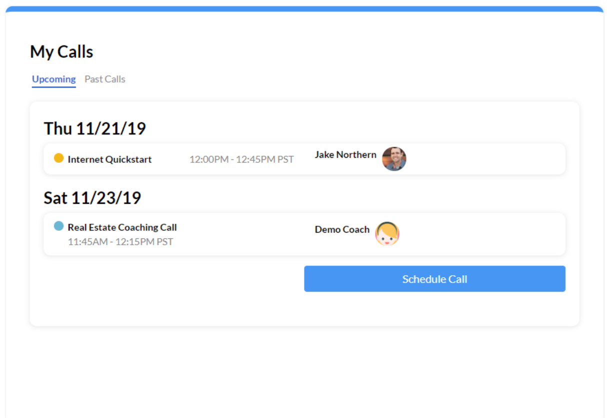
Things to Note

- For group coaching webinars with multiple attendance options, the registration button will be inactive until a time is selected.

- Date filters will not show if there are no group coaching webinars taking place in that time period.

My Calls Overview

The My Calls section allows you to review upcoming calls booked with a coach, review past calls, as well as schedule calls with a coach. The My Calls section on the coaching page is an expanded version of the My Calls section in the dashboard.



My Calls Details

The information displayed in the My Calls section includes:

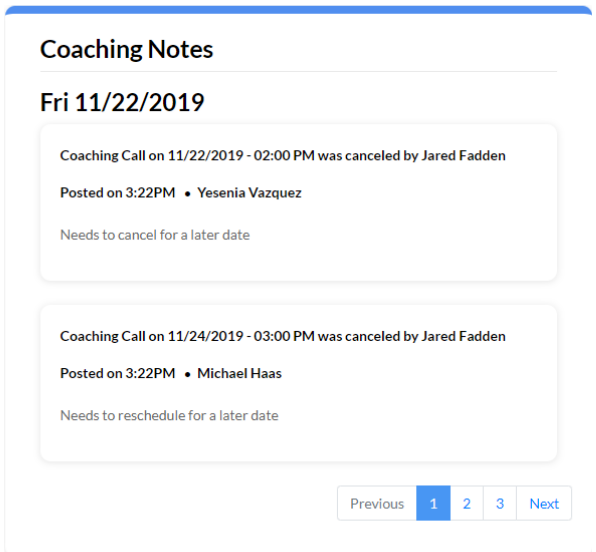
- **Call Filters**– Changes the display of calls. Options include Upcoming (default) and Past Calls.
- **Date** - Each call is separated into sections by date.
- **Call Type Icon** - Each call has a colored icon which corresponds to the call type.
- **Call Type -** Lists the type of coaching call.
- **Time -** Lists the start time and end time of the coaching call.
- **Coach Name -** Lists the name of the coach the call was booked with.
- **Coach Picture -** Shows a picture of the coach the call was booked with.
- **Schedule Call** - Jumps back up to the 1-on-1 Coaching section of the page.

My Calls Features

- **Click on Past Call** – Clicking on a past call will show call details and a short coach bio. Clicking on the back arrow icon will return you to the Past Calls view.

Coaching Notes

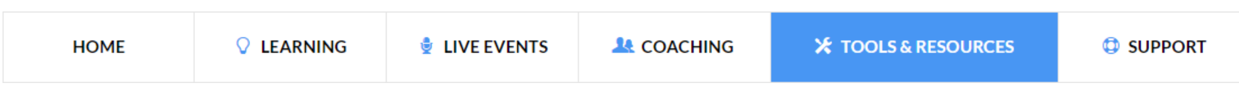
The Coaching Notes section displays any notes associated with your account. Each note is grouped by date, and displays the title and body of the note. Using the Previous, Next, and page number options allows you to jump to all past coaching notes.



Tools and Resources

Tools & Resources Access

To access the Tools & Resources page, click on Tools & Resources from the Quick Navigation bar on the Dashboard.



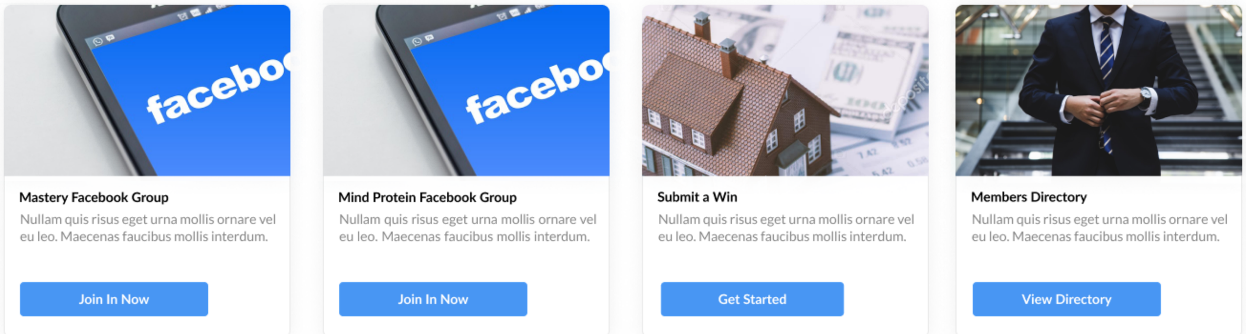
Tools & Resources Overview

The Tools & Resources Page is a collection of links and tools important to your program. Each set of tools and resources is categorized as follows:

- **Community**
- **Investor Tools**
- **Business Accelerators**

Community Tools & Resources Details

Community



The information displayed in the Community section includes:

- **Mastery Facebook Group -** Opens a new page with details on how to join the Mastery Facebook Group as well as guidelines & expectations.
- **Mind Protein Facebook Group -** Opens a new page with the same details as the Mastery Facebook Group, but specific to Mind Protein.
- **Submit a Win** - Opens the Submit a Win page where you can submit your big win to the FortuneBuilders team. These wins can be featured on our website!
- **Members Directory** - Opens the Members directory page where you can search and view fellow students by name/email, city, state, and zip code. A filter is available to change the number of students displayed per page. Clicking on a student will open their Student Profile Page.

The Student Profile Page includes:

- **Name** - The student's name.
- **Location -** The city, state, and ZIP code of the student.
- **Join Date** - When the student joined the FortuneBuilders family.
- **Social Media Links -** Links to the student's Facebook and Twitter profiles.
- **Featured Quote** - A short quote set by the student on their student profile.
- **Student About -** A short blurb describing the student's interests, goals, and inspirations.
- **Business Info** - The name, contact phone number, and website of the student's business.

Investor Tools Details

- **Program Documents** - Links to the Documents page. See the Learning - Documents section for more details. You'll need to agree to the Documents Disclosure Statement to access this page.

- **Scope of Work -** The scope of work library will provide you with ready to go templates that can be used to create a SOW for your project.

- **Contractor Leads -** Resources and materials to help you find contractors, work with contractors and manage projects to completion.

- **State Reference Guide -** Quickly check average fees, taxes and real estate transaction procedures for each state in the US.

- **Investor Checklist -** Assortment of checklists to help you with tasks related to investing

- **Commercial Deal Analyzer Software -** Learn how to use this tool to estimate the profitability of a commercial deal.

- **Realeflow -** Learn how to use this incredible back office database to manage your real estate investing strategies and contacts.

- **Syndication & Capital Raise Webinars -** Exciting investment opportunities exist in commercial real estate. Learn about upcoming investment opportunities and how you can add this to your investment portfolio.

- **Canadian Toolbox** - Resources and materials specific to investing in Canada.

Business Accelerators Details
These tools and resources are designed to assist you in the important aspects of your business.

- **Passive Income Club** - Learn how the Passive Income Club can help you add properties to your investment portfolio that can provide a steady source of income to you.

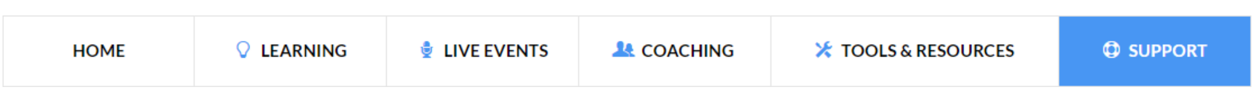
- **Inner Circle -** Schedule a Consultation to apply for or learn more about Inner Circle.

- **NCH Services -** Learn how Nevada Corporate Headquarters can help provide you with asset protection strategies to protect you and your business.

- **Mind Protein -** Learn how the Internet Quickstart program can accelerate your business growth!

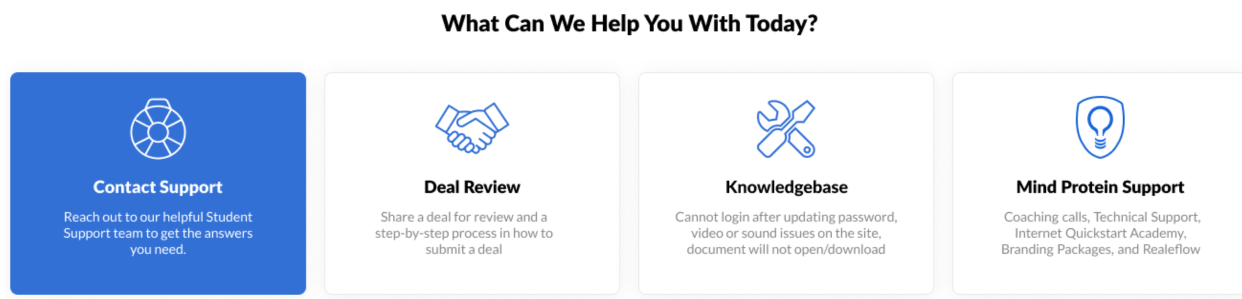
Support

Support Access
To access the Support page, click on Support from the Quick Navigation bar on the Dashboard.



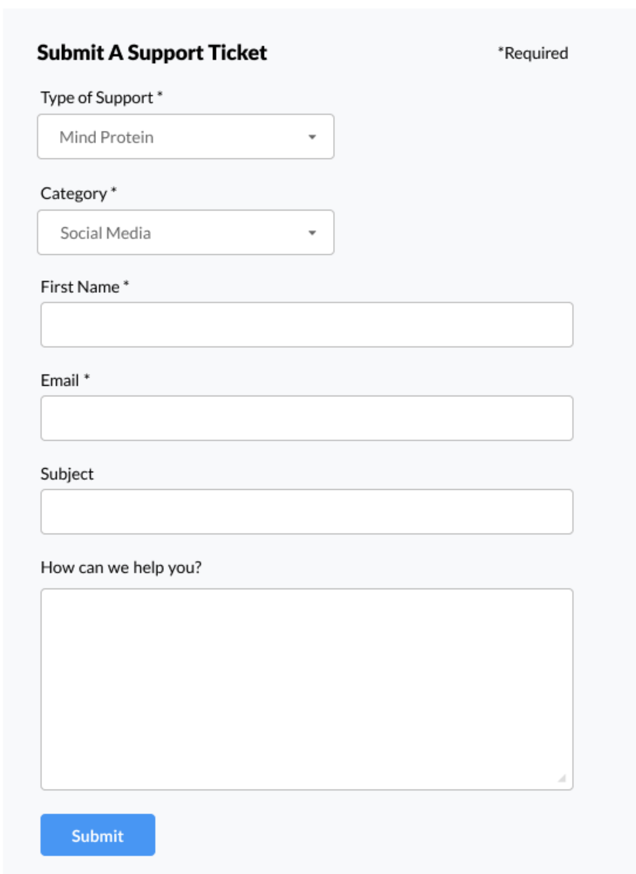
Support Overview

The Support Page is where you'll go when you have any general questions, need help with Deal Review, access technical support in the Knowledgebase, as well as support specific to Mind Protein. Access each page using the Support Toolbar.



Contact Support

The Contact Support option will open a webform with can request help from a member of our skilled Student Support team either by phone or by support ticket.



Support via ticket is quick and easy to submit.

Required Fields

- **Type of Support** - The high-level program your ticket relates to.
- **Category** - The topic your ticket relates to.
- **First Name -** Your first name. Pre-populated from your account details.
- **Email -** Your email address. Pre-populated from your account details.

Optional (but recommended) Fields

- **Subject -** You should list a summary of the specific question/issue you have in the Subject field.
- **How can we help you?** - The body of your ticket. Describe your question/issue in full detail for the Student Support team.

Deal Review

The Deal Review section allows you to submit a deal for review by a Real Estate Expert. Be sure to follow the step-by-step instructions to submit your deal correctly. The page features a short video detailing the Deal Review process, as well as a webform where you'll describe your deal, as well as include the Deal Analyzer (in Excel format), Comps (up to three), and photos related to the deal (up to five).

Knowledgebase

The Knowledgebase is a collection of articles related to technical issues within the LMS. Use this page when you have questions about how the site works or issues with site functionality. Click on an article to expand it.

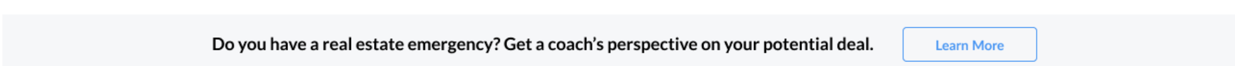
Mind Protein Support

The Mind Protein Support page is very similar to the Knowledgebase page, but specific to topics relating to the Mind Protein program. Click on an article to expand it.

Real Estate Emergencies

The Real Estate Emergency page gives you instructions on how to reach a coach in the case of an emergency. Real Estate Emergencies are typically time-sensitive and involve money exchanging hands in which you would like a coach's perspective. We do not provide legal advice so it is best to contact your attorney in those particular situations. You should only use the Real Estate Emergency help line if you are about to make a lot of money or lose a lot of money on a potential deal that you're working on.

The Real Estate Emergency page is accessible underneath the main support information on the Contact Support, Deal Review, and Knowledgebase pages.



- By default, the Support page displays information about Real Estate Emergency support and is designed to educate you on flagging issues appropriately as Real Estate Emergencies.