▲ APPEX360

Plant Excellence Intelligence Platform

Administrator Guide

Complete guide to configuring APPEX360 for your organisation. Covers user management, system settings, assessment templates, and subscription administration.

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APPEX360 Knowledge Centre

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Administrator Guide

Complete guide to configuring APPEX360 for your organisation. Covers user management, system settings, assessment templates, and subscription administration.

1. Overview

Purpose
This guide covers the administrative functions of APPEX360. Use it to set up your organisation, manage users, configure assessments, and oversee billing.

Who should use it
System administrators and organisation managers who are responsible for configuring and maintaining APPEX360.

Expected outcome
After following this guide you will be able to add users, create assessment templates, manage subscription settings, and monitor platform usage.

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2. Quick Start

☐ Log in as an administrator.
☐ Open the Admin panel from the left navigation menu.
☐ Add your organisation's details.
☐ Invite users by email.
☐ Configure your first assessment template.
☐ Review subscription status under Billing.

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3. Detailed Walkthrough

User Management

Navigate to Admin → Users. You will see a table of all registered users in your organisation.

To add a user: Click "Invite User". Enter their email address and select their role. Available roles are:

Administrator — Full system access including user management and billing.
Executive — Access to Boardroom, reports, and intelligence tools.
Analyst — Can create and complete assessments.
Viewer — Read-only access to reports and dashboards.

The invited user receives an email with a secure login link.

Assessment Templates

Navigate to Admin → Assessment Templates. This is where you configure the assessments your organisation uses.

Each template has sections, questions, and scoring rules. You can create templates from scratch or clone existing ones.

To create a template: Click "New Template", enter a name and description, then add sections. Each section contains questions with a 1–5 rating scale.

Billing and Subscription

Navigate to Admin → Billing. Here you can view your current plan, usage statistics, and invoice history.

To upgrade: Click "Manage Subscription" to open the Stripe customer portal. Plan changes take effect immediately.

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4. Best Practices

Assign roles carefully. Administrators have broad access. Limit this role to essential personnel.

Review user activity quarterly. Remove inactive users and adjust roles as team structures change.

Back up assessment templates before modification. Clone the template first, then edit the clone.

Monitor subscription usage. The Billing page shows your current user count against your plan limit.

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5. Common Mistakes

Over-assigning Administrator role. Most users only need Executive or Analyst access.

Not setting assessment templates before inviting users. Templates should be ready before users are onboarded.

Deleting users instead of deactivating them. Deactivation preserves assessment history.

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6. Troubleshooting

User not receiving invitation email: Check spam folders. Verify the email address is correct. Ask the user to whitelist notifications@appex360.com.

Cannot access Admin panel: Verify your role is set to Administrator. Contact another administrator if needed.

Billing page shows errors: The system uses Stripe for payment processing. Verify your Stripe account is active and API keys are configured.

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7. Related Features

First 30 Minutes Guide — recommended reading for new users before you onboard them.
Executive Guide — the features your executives will use most.
Assessment Guide — detailed walkthrough of assessment management.
Security Guide — data privacy, roles, and compliance.
Billing Guide — subscription management and invoicing.

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8. Frequently Asked Questions

How many users can I add?
Your plan determines the maximum number of active users. The Billing page shows your current limit.

Can I customise assessment questions?
Yes. Administrators can create and modify assessment templates from the Admin panel.

How do I change a user's role?
Navigate to Admin → Users, find the user, and edit their profile. Role changes take effect immediately.

What happens when my subscription expires?
Assessment data is preserved for 90 days after expiration. Contact your account manager to reactivate.

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