INTEGRATIVE
SOLUTION SERVICES LLC
— CollaborApp —

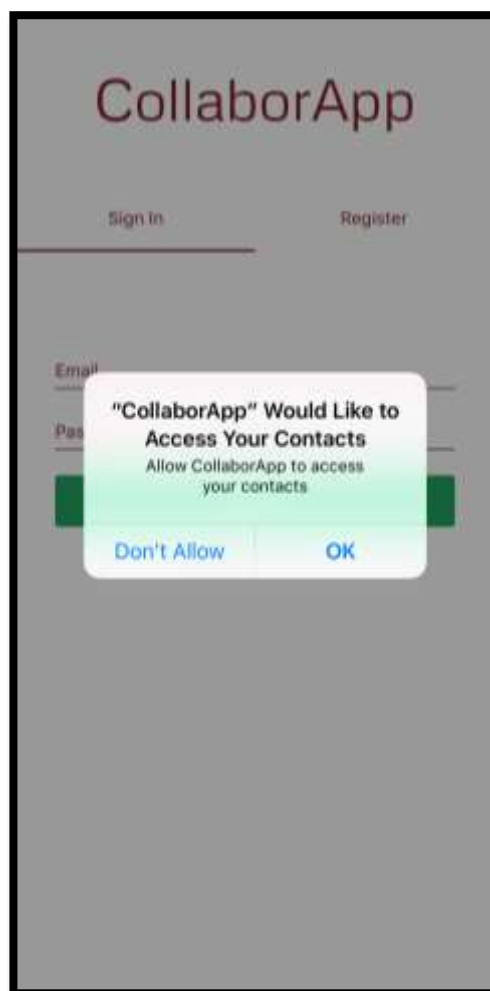USER GUIDE

POWERED BY: IDIALOGUE

Table of Contents

Launch Application

▶ Note 1: Prompt will be displayed for Camera access and Contact access permission
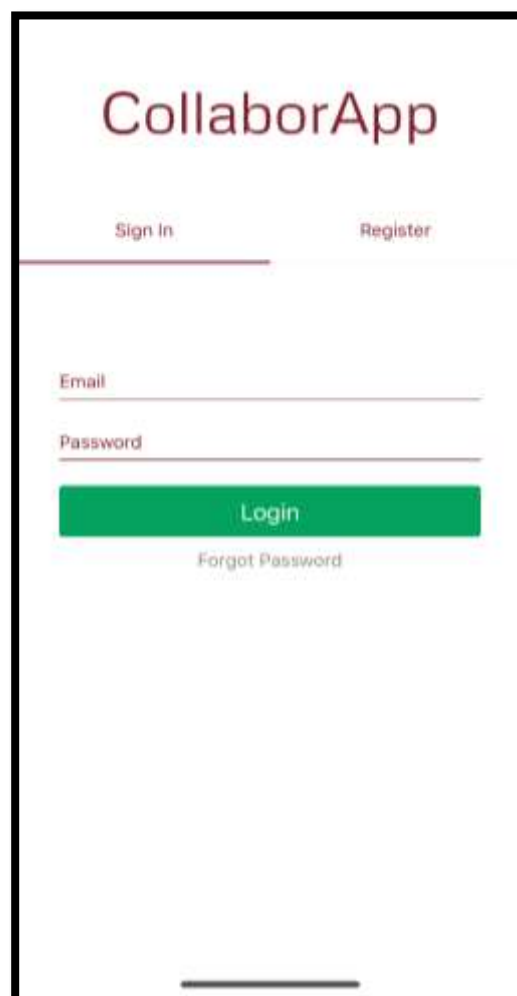
▶ Steps

1. Tap OK button

Login

Assumption User is already registered

▶ Steps

1. Enter Email Address

2. Enter Password

3. Tap Login button

▶ Steps if the user is an added contact

1. Access Email

2. Login via temporary password

Register

Assumption The user has already launched the app

▶ Steps

1. Slide from Login screen to Register screen tab

2. Enter information on fields

3. Tap Save button

▶ Note 2: Household will be created in Salesforce

Onboarding

▶ Note 3: Household will be created in Salesforce

▶ Steps

1. Enter Consumer Details
2. Tap profile picture icon to launch camera and snap a picture
3. Enter Assessment fields
4. Click Save

▶ Note 4: Consumer will be created in Salesforce Contact

Homescreen

▶ Note 5: Upon saving Onboarding details, system will redirect user to Homescreen. On first time view, <u>latest message</u>, and <u>Today's event</u> won't be displayed yet.

▶ Once there are messages and events already available, latest message, and Today's event will be shown on Homescreen as well.
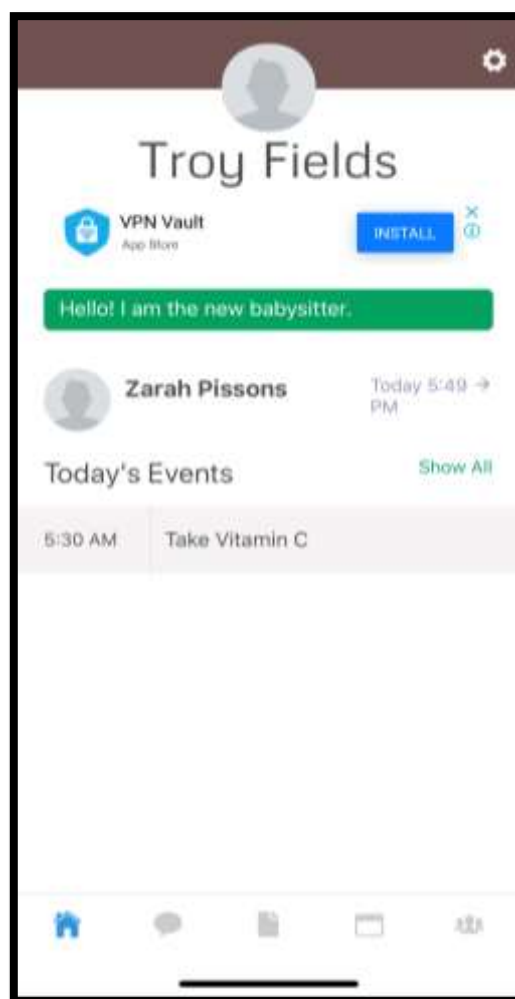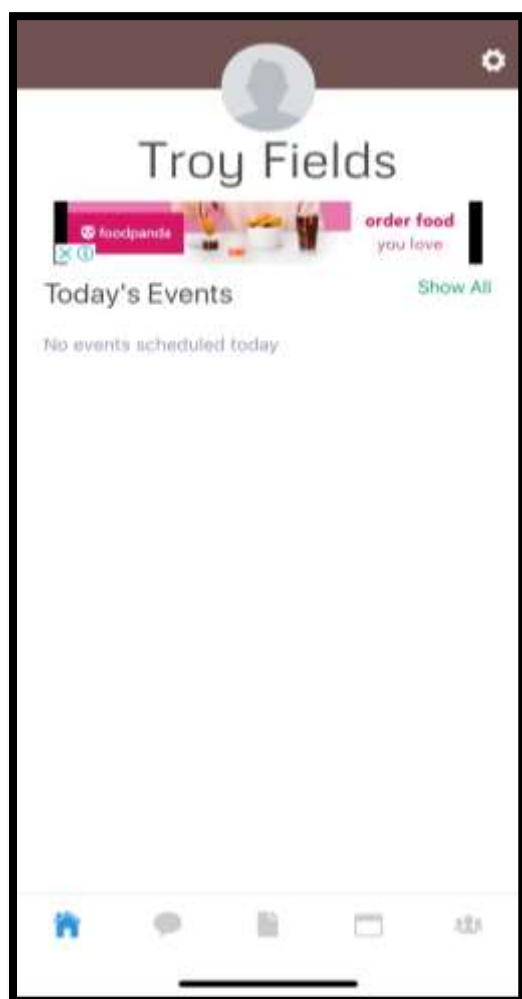
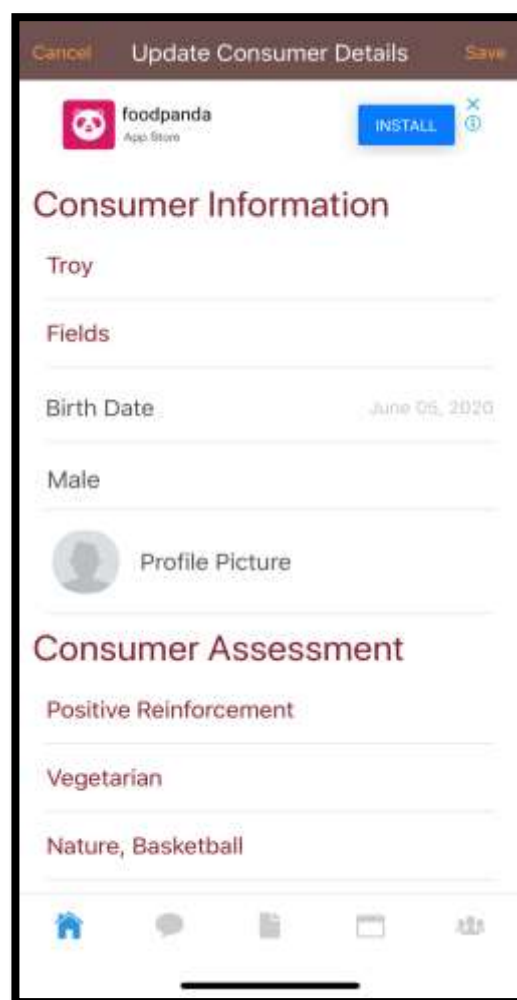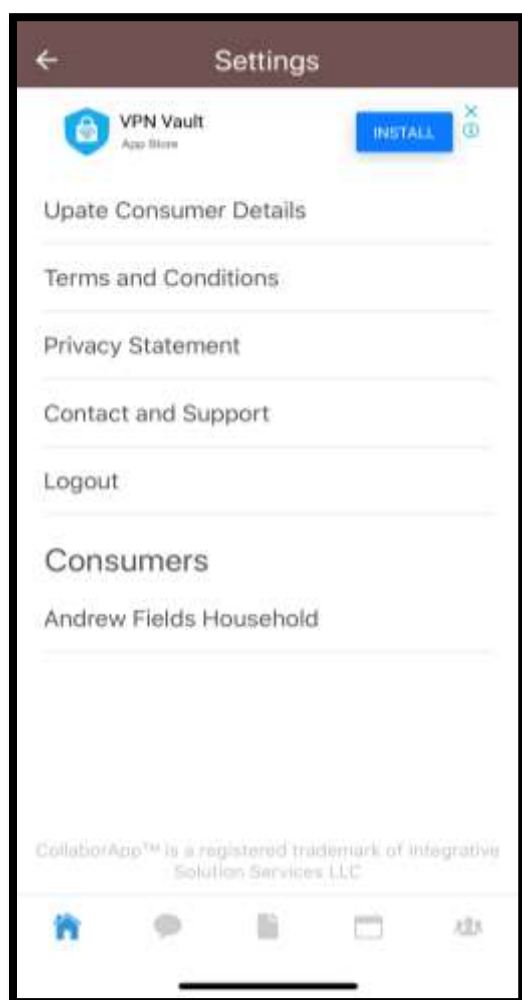## Update Consumer Details

► Assumption: User is currently viewing Homescreen

► Steps

1. Tap gear icon from the upper right corner of screen to view Settings

2. Tap Update Consumer Details
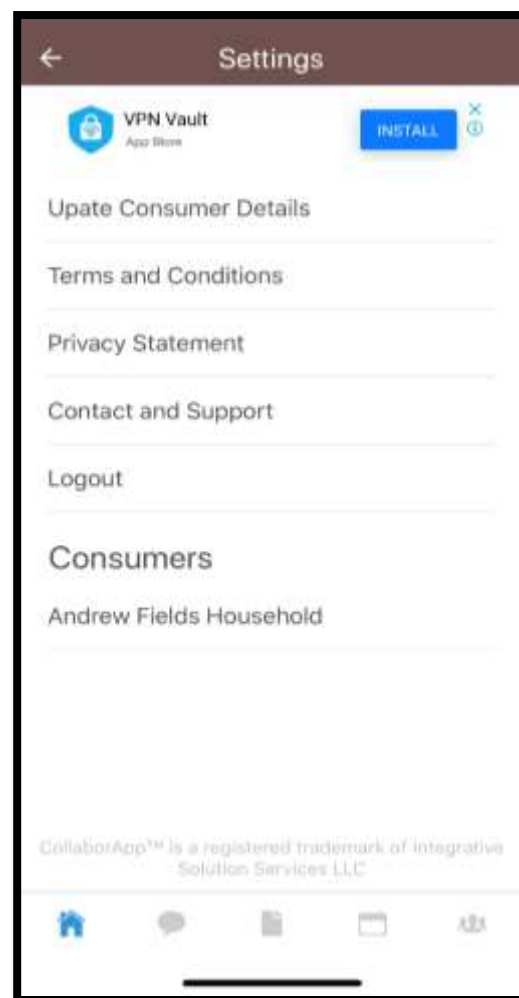
3. Update details, and Save

Settings

▶ Note 6: On Settings, apart from Update Consumer details, user may also

1. View Terms and Conditions

2. View Privacy Statement

3. View Contact and Support

4. View Other Consumers- for multiroom experience

▶ Note 7: On Settings, user may also Logout

▶ Steps

1. Tap the Gear icon
2. Tap the desired screen to view

Messaging

► Note 8: For MVP, only group messaging is available

► Steps

1. Tap Messaging Icon

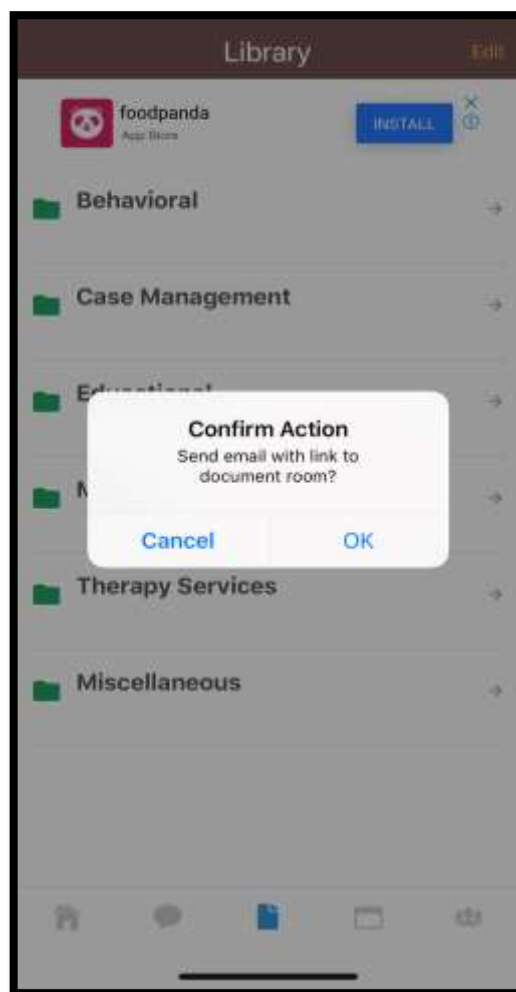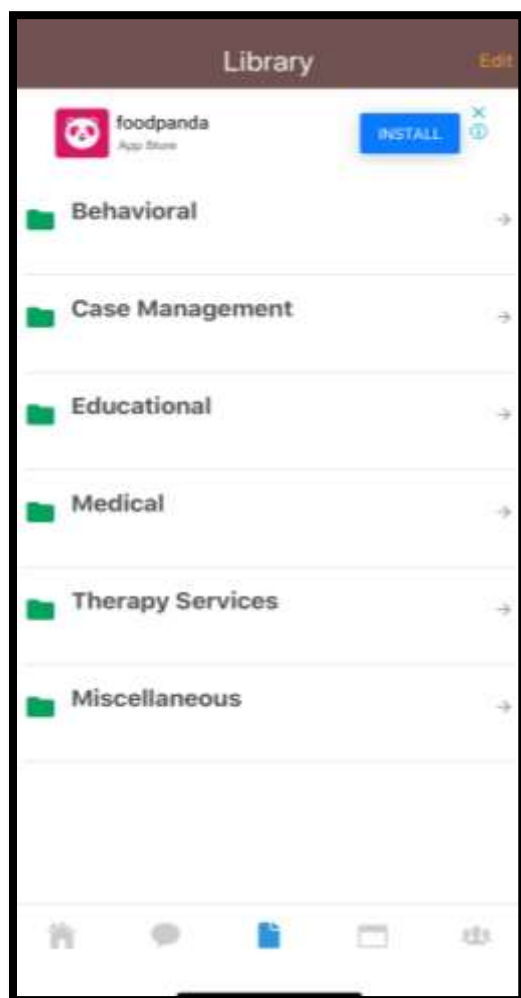2. Enter a message

3. Tap send

Library – Add File

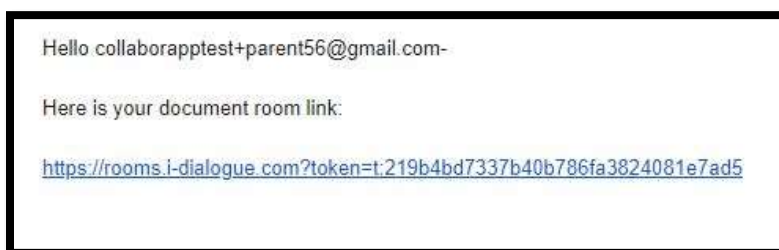▶ Note 9: Only an admin can upload files

▶ Steps

1. Tap on Edit link

2. Tap OK to confirm action

3. Open Email to access Document Room Access link

4. Click on the link

Hello collaborapptest+parent56@gmail.com-

Here is your document room link:

https://rooms.i-dialogue.com?token=t:219b4bd7337b40b786fa3824081e7ad5

5. Choose the folder, tap Upload Document or simply drop the file to upload

e.g. Publishing to Appstore.pdf

on Behavioral Folder
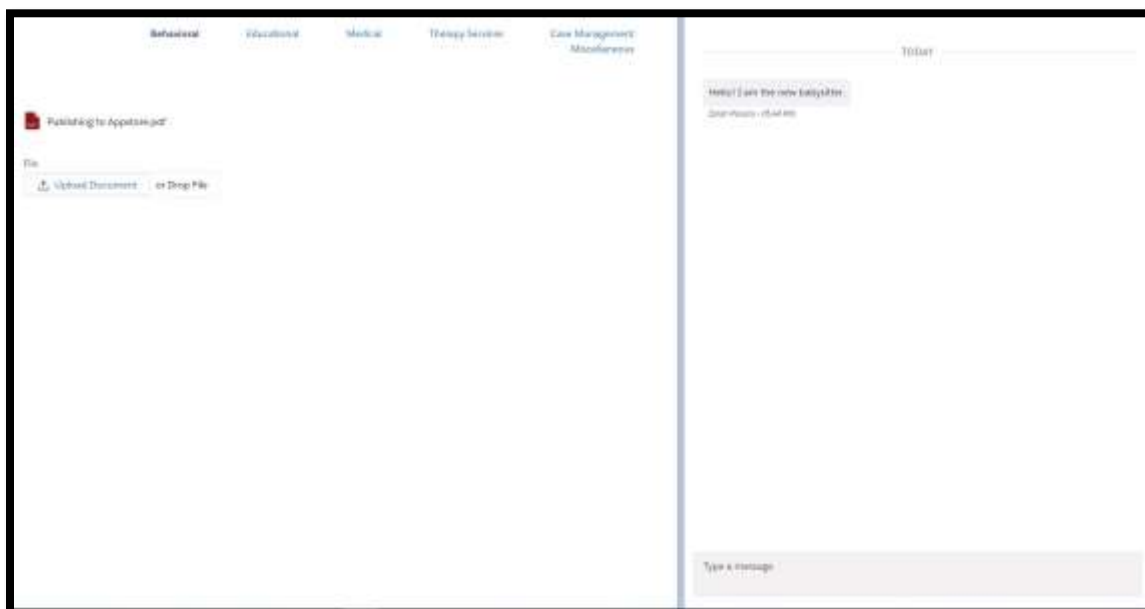
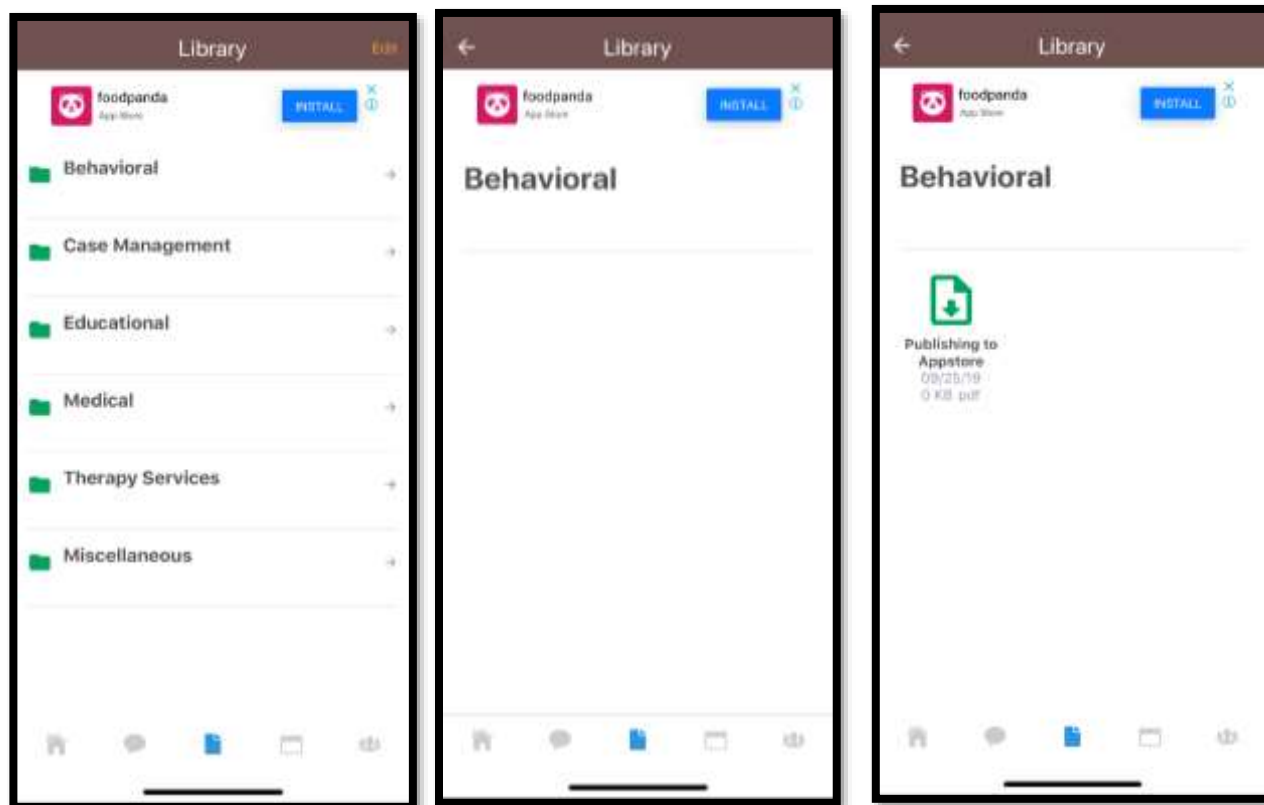## Library – View File

► Steps

1. Tap Library

2. Tap Folder (e.g. Behavioral)

3. Click on File

► Note 10: If file has just been uploaded, pull the screen from top to bottom to refresh

Calendar – Add Event

▶ Steps

1. Tap Add link
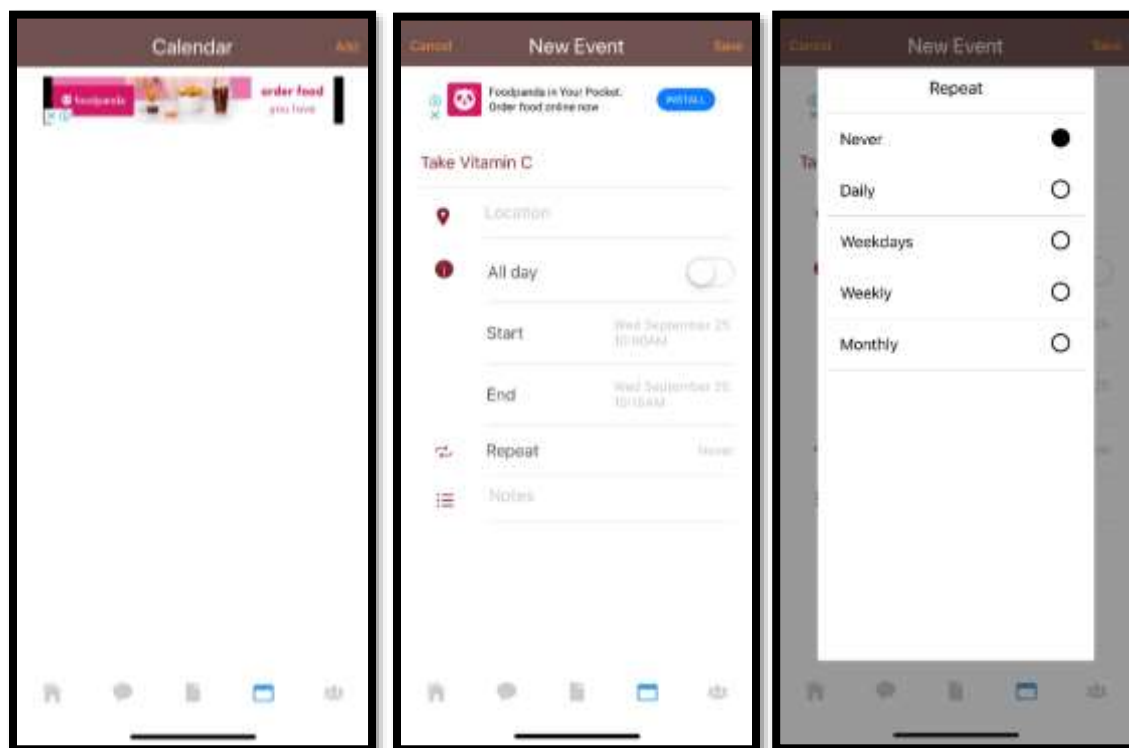
2. Enter Event Detail

▶ Note 11: Event may repeat
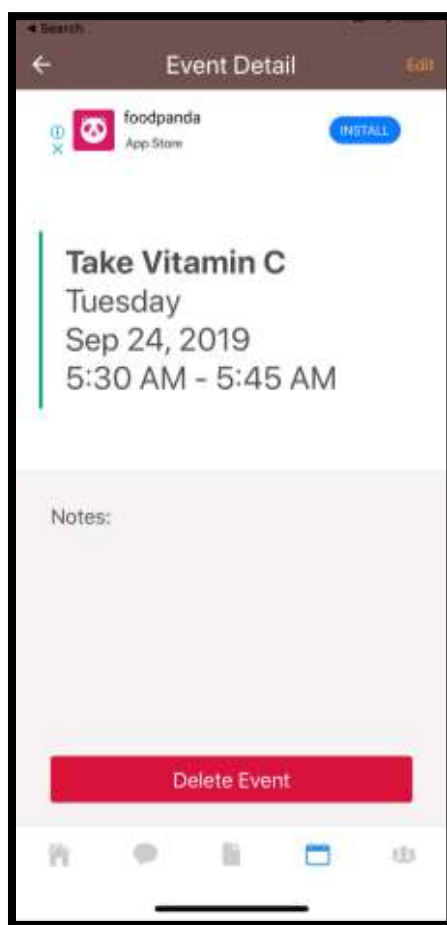
Never

Daily

Weekdays

Weekly

Monthly

Calendar – View Event Detail

► Steps

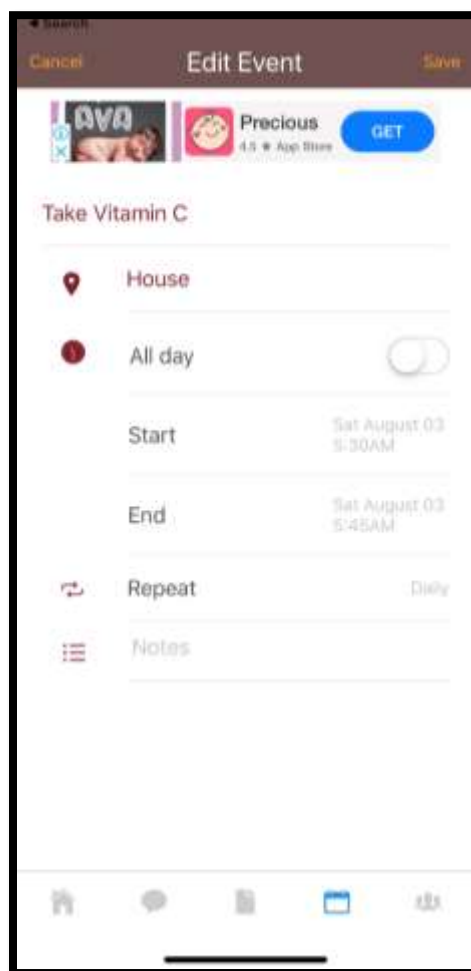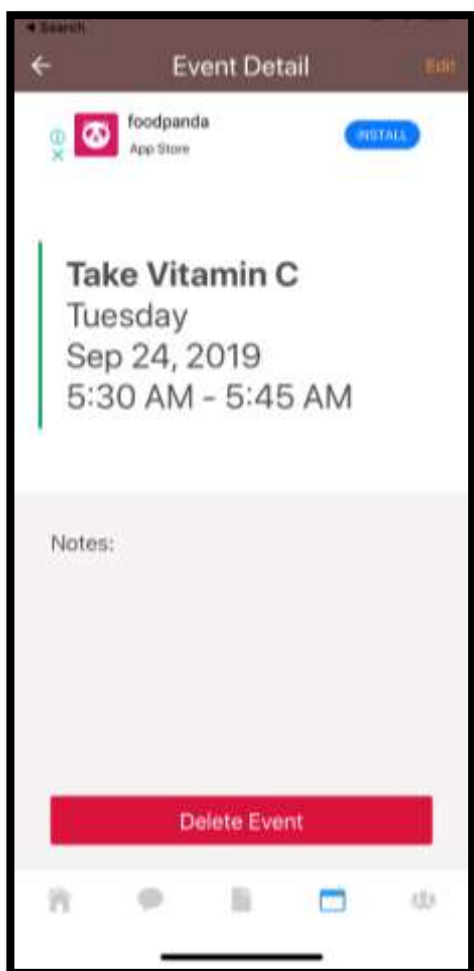1. Tap Event from the list.

► Note 12: User may Edit or Delete Event
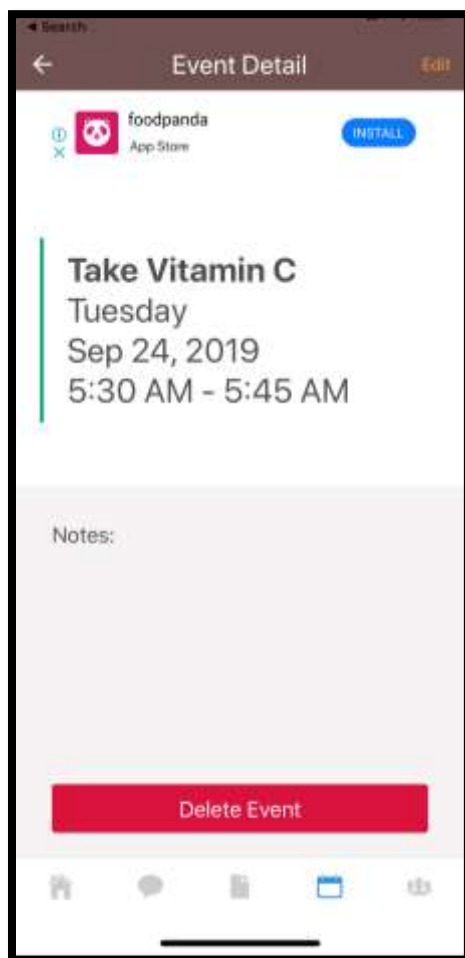
Calendar – Edit Event

▶ Steps

1. Tap Edit

2. Make necessary updates

3. Tap Save

Calendar – Delete Event

▶ Steps

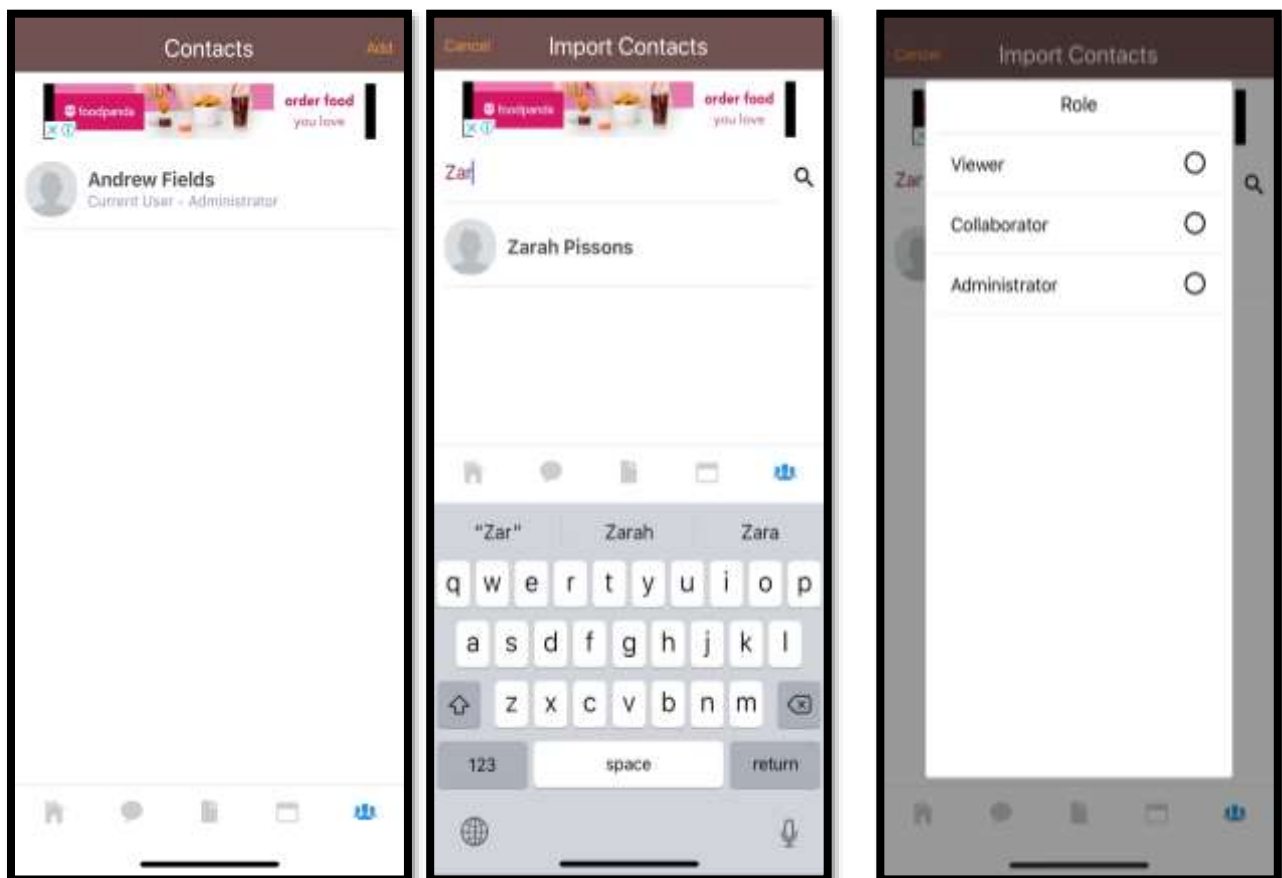1. Tap on specific Event

2. Tap Delete Event button

Contacts – Add Contacts

▶ Steps

1. Tap on Add link

2. Search for the contact user wishes to add

3. Select Role

▶ Note 13: A collaborator on one household may be an Admin or Viewer on other households
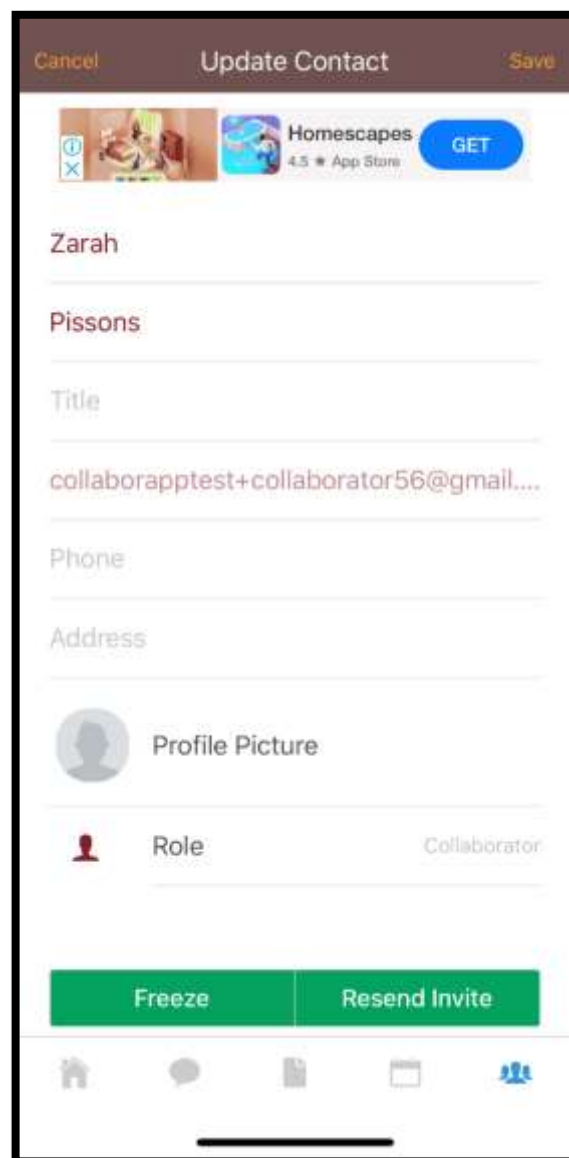
Contacts – Edit Contacts

▶ Note 14: An admin can update its own details, and other contacts' details

▶ Steps

1. Tap any contact

2. Make necessary update

3. Tap Save

▶ Note 15: An admin may freeze/ unfreeze contact.

▶ If a user's account is on-hold on a certain household, they may still log in to another household they're affiliated with

Multiroom Experience

▶ Note 15: User may log in to different households they're affiliated to. He may have a different role in each household

▶ Note 16: System will re-initialize and display Homescreen of another consumer once its name is tapped from the list

▶ Steps

1. Tap gear icon to view Settings

2. Scroll down to list of other consumers

3. Tap the name of consumer