Setup guidelines

Before you activate your account and start inviting everyone, you will need to setup a few features:

A communication App is great but there have to be some controls, or else things could get out of hand.

We know that "organisations" have a need to share information, but need to manage who gets to post this information, and whether a reply to a message is necessary.

Imagine if every post allowed tens-of-thousands of members to reply. That would be crazy!

With this in mind, we have split your organisation into three sections. Members, your general staff and administrative staff.

Members – Everyone who registers and joins your community.

Staff– Anyone who works in the organisation. All staff need to be placed into groups or else they will be treated as a Member.

As we do not know who is who, we have created an easy way for you to separate your staff from your members.

We also allow you to decide which staff get administrative roles.

So let's start.

Remember, you can delete the mobile app and this site if you feel uncomfortable. You have successfully registered your organisation and are now on the dashboard screen.

Your account is not yet active, so you have time to setup your organisation correctly.

All staff must be placed into <u>groups</u>- which you already created. Consider your communication hierarchy from the CEO to the security guards and all personnel in between.

Note: All groups get a password, but **not** all groups are given administrative rights. So if everyone is placed in one group, everyone can post, update and edit. Not a good idea!

Groups also make messaging easier, as relevant groups can be selected, instead of scrolling through all the staff and selecting each individual.

Don't worry if you create too many or too few groups, as you can add or delete them, at any time. This is done in "Business Details" found on the left margin.

TWO Steps, that's all!

1. You will first need to add the Owner/Director and a Manager. This is done in "Admin > Manage Members".
2. You must now assign "restricted features" to the administrative Groups. Just remember, this affects every person placed in that Group.
   We have given the owner, manager and admin persons full access to all features, but this can be change at any time. Be mindful of which other Groups get administrative permission
3. By default we have created unique passwords for each Group, which can be changed at any time. You **must** save them to take effect.

If you go back to the dashboard, you can now activate your FREE 7 day trial or you can select a subscription.

For a subscription, we will first need to confirm that your payment has been received, before we activate your account. So activate the 7 day trial before your subscription.

You are now ready to invite staff, create posts and once you are comfortable invite your members.

First email or message each staff member their Groups password and ask them to download the in4mant app, then they must register and join your organisation.

When they select your organisation they are asked to add their Admin Code. That password will place them into their assigned Group.

You can confirm who has registered in **Manage Members**. Those who didn't add their password correctly will be Members, but you can manually move them into their group.

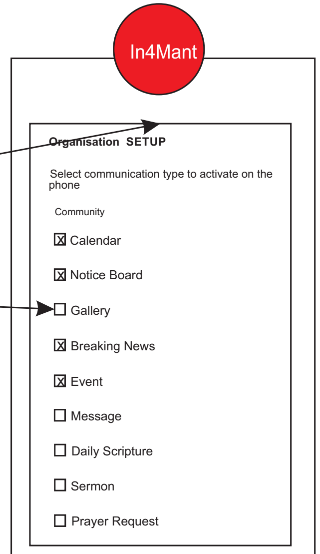
While you wait for all your staff to register, you can start to add content.

Once most of your staff have registered you can now invite your Members to register. NB. Members don't get a password.

Dashboard

When you registered, you selected from the organisation setup, a list of features that you though you would like to use.
Gallery, Messages, Notice Board, Breaking news, Events, and Calendar.
If you will not be using a communication features, you can un-select it >Business details, 2nd page > Organisation Setup.
It is an ON or OFF feature, so you can activate it later.

Every communication feature has a button called **[ADD]**. You must select this button if you want to post something, via the Web.
Please post info to each of these, so that your members get to see what your organisation is up to.
If there is nothing to post it might be prudent to un-select the feature and reinstate it when you have content.



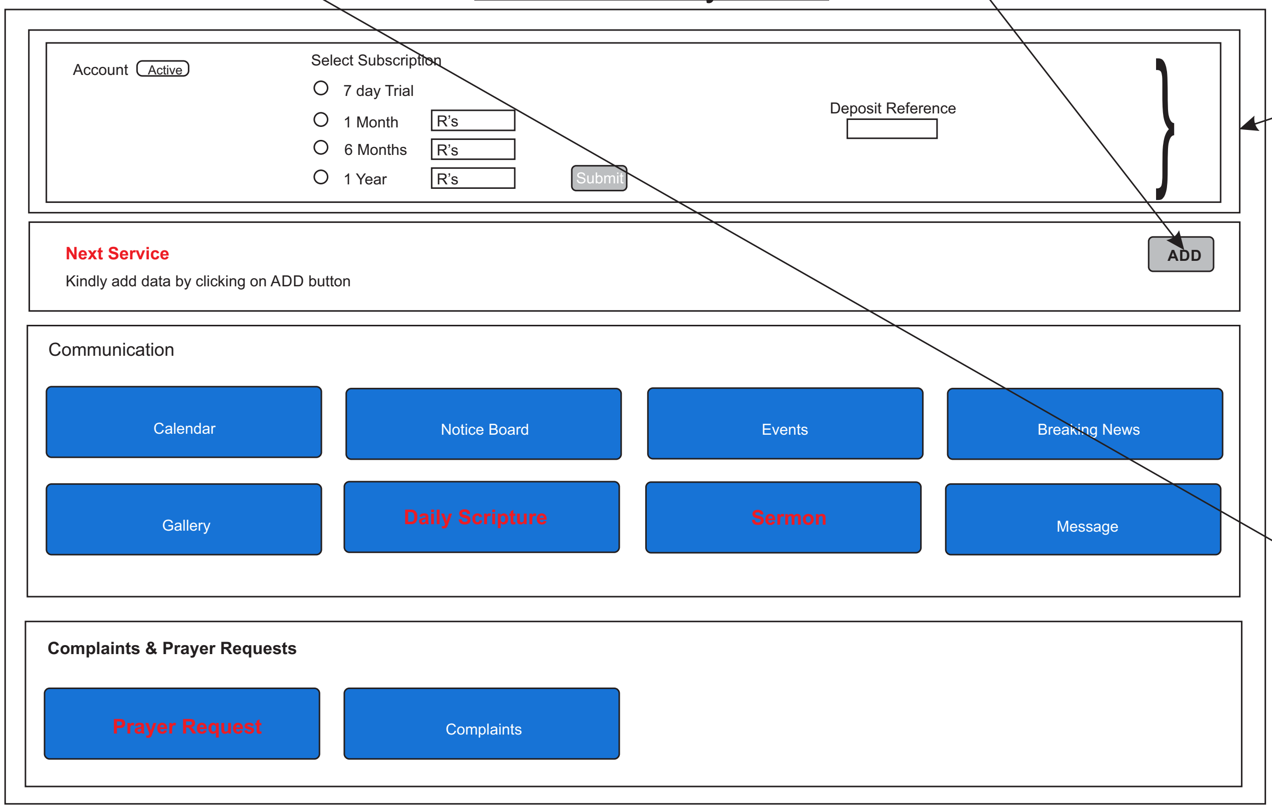
Business Details Page 2

Dashboard
Admin
Statistics
Business Details
Advertisments

Your back-end administrative Features

Dashboard

This is where you are



You won't see this subscription section until:

1. You have added an Owner/Director and Manager
2. Selected each Groups administrative rights.
3. Given each group a unique password..

This will take 10min.

Only for Churches

This is where you upload the information for the Next Church Service.
All you need to do is click on the **ADD** button and fill in the blocks.

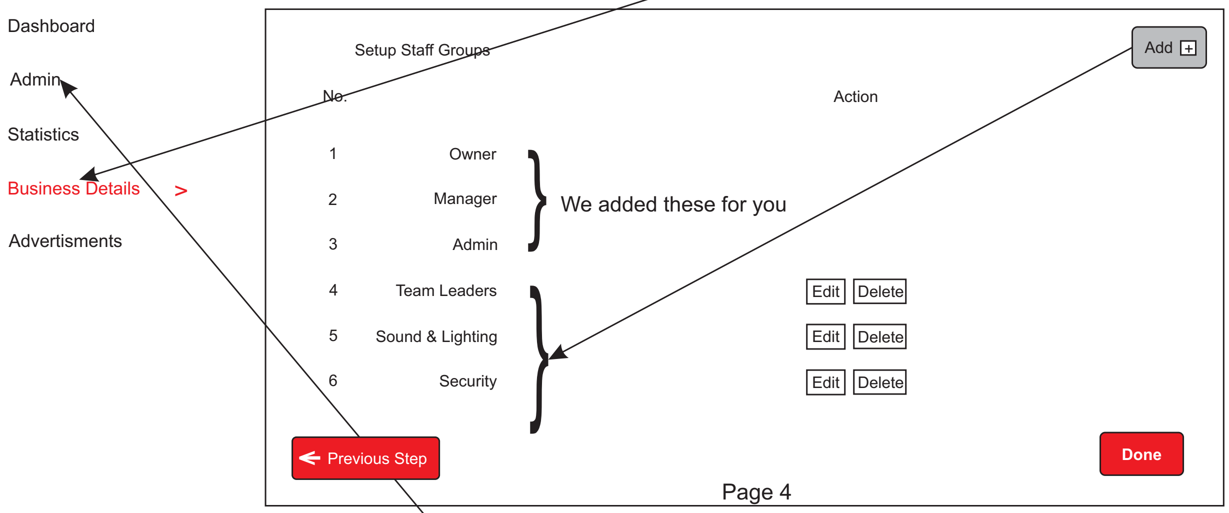
When you registered, you selected these communication options.
Daily Scripture, Sermon and Prayer Request are options only available for Churches
If you go to **Organisation Details** you will be able to select or de-select these options. If you are not going to use a feature, don't select it as it will just be a dormant button on the mobile phone, which won't look good. When you later have content, you can activate the feature.

"**Business Details**" This is where you add or remove Groups and Notice Board TABS.

Complaints can only be viewed on the WEB page.

Step 1 Groups

As part of your setup, you created some Groups. If you need to add more, go to > Business Details, Page 4



Groups:

- > They are used to separate your staff from the public, and also to give certain Groups, administrative permission.
- > Groups that do not have administrative permission can still see all posts, but they just can't post or edit.
- > Any staff member in any Group can receive and reply to personalised messages.
- > All Groups can see the staff and members calendar.
- > When Messaging Groups, individuals can still be removed from the recipient list, if the content is not applicable to them.
- > Messaging Groups is so much easier and quicker than selecting all the individuals.

NB. There must be an Owner at all times as they have 100% access to all feature, for this reason they do not appear on the Restrict Feature.
The Owner/Director and Manager can edit and change all other tiers below them.

Once you have set up your hierarchy into Groups, go to, Admin > Settings > Restrict Features.

Step 2 Restrict Features

In Admin > Settings > Restrict features you decide which Groups can post information and if they have access to sensitive web pages.
So the Owner/Director would typically have full access and the cleaner none.

NB. Select Individuals like the CEO can be in their own group as they won't have any restrictions.
The Manager is the next most senior tier and their restrictions can’t be changed by any other Group other than the Owner.
Your banking details can only be added or edited by the Manager or Owner/Director.

Restrict Features

Admin
- Manage Members
- Create Responses
- Settings
  - Manage Hierarchy
  - Restrict Features >
  - Create Mbile Reg Password
  - Banking Details
- Statistics
- Business Details
- Advertisments

Restrict Features

	A						B		C		D			E
Group	Breaking News	Calendar	Gallery	Notice Board	Messages	Events	**View** Complaints	**View** Prayer request	Daily Scripture	Next Service	Business Details	Advertising	Settings	Admin Password
Manager	☒	☒	☒	☐	☒	☒	☒	☐	☒	☒	☒	☒	☒	______
Admin	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	______
Secretary	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☐	☒	☐	______
Casual Help	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	______
Security	☐	☐	☐	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	______
Ground crew	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	______

Every block that is ticked allows every member in the Group to either post information and access sensitive web pages.
FOR this reason, place similar people who do the same work with the same authorisation into the same Group.

A. Are the standard messaging features that can be managed from the phone or web.
B. Allows the group members to View Complaints and Prayer requests (applicable to Churches)
C. These are extra communication features, only for churches, that can be managed from the phone or web.
D. These blocks should only be ticked for the Owner/Director and Manager, as they protect sensitive pages on the WEB.
E. Every Group has a unique password. By entering the password on the mobile phone, the individual is placed into that Group.

As every Staff member is in a Group, they have additional benefits, not available to the members.

You **can** message an individual staff member, but **cannot** message a member of the public (except for churches).

The Calendar can be split between Staff relevant and Members relevant posts.

If a Group has no ticks, this means that they can view and reply to posts, but they can’t create any posts or access your web profile.

(**So by ticking a block, you are giving everyone in that group the “ticks” administrative permission.**)

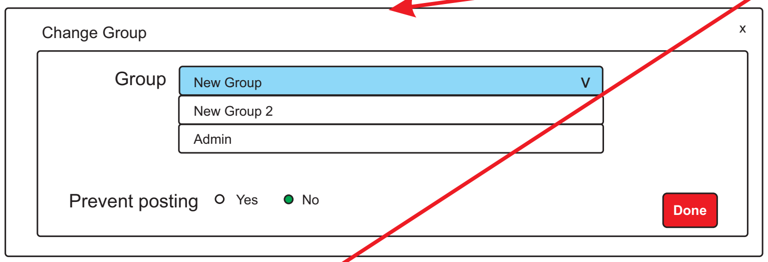
To confirm who is in the same Group, go to **ADMIN > SETTINGS > MANAGE HIERARCHY.**

To create or change passwords go to **ADMIN > SETTINGS > CREATE MOBILE REG. PASSWORD**

Step 3 Manage Members

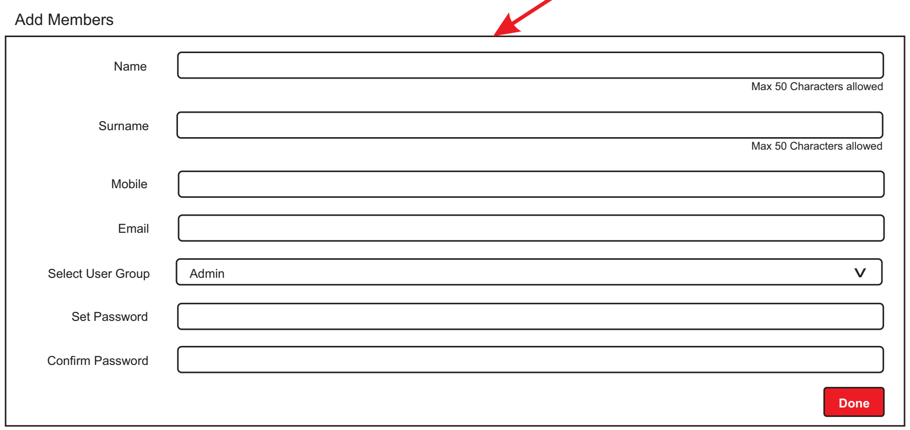
Before you can activate your account or even use the 7 day free trial, you will need to **manually** add the Owner/Director and Manager.
Please select the ADD button and fill in the required info.
Please give the Owner/Director & Manager the passwords, you created, as they will need it to login.
They can change it once they have logged in, so keep the password simple for now. Once they have logged in, their profile is found on the top right corner.
Only once your account is activated can it be found with the other listed organisations, on the mobile app.
After activation, you will find that some staff will have registered, joined your organisation, but did not enter their code. They will be categorised as Members.
You just need to select the edit button, then place them into their correct Group.
Before you invite the public to register, invite all your staff. It will just make it easier for you to find your staff and place them correctly.
Once most of your staff are correctly placed into their groups, you can invite the public.

NB. Once your account is activated,
It will make life a lot easier if you get all your staff to register first. That way you don't have to scroll through all the members names to find them.



When you select the down arrow "V"
You can select the correct GROUP the person must be placed in.

If any person keeps making silly comments to a post, you can prevent them from responding to any further posts.



NB. you must add the Owner/Director and Managers details if they are not listed.
This needs to be done as they are both given full access to this site.
They can change their password in their profile - found on the top right corner.
Any other employee that will need access to the web portal, must register here.
Anyone who is registered here can use the same details to login, to the mobile.

You cannot add a person if they share email addresses or telephone numbers.

Step 5 Manage Hierarchy

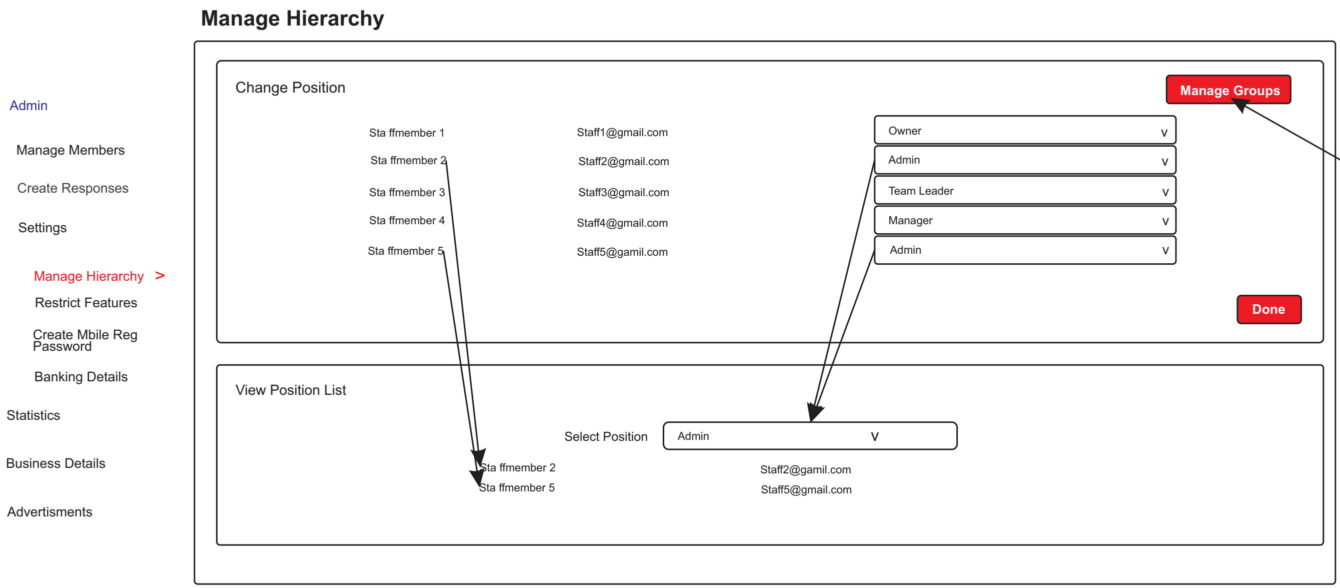
The difference between Manage Members and Manage Hierarchy, is that Manage Members, moves a members into a staff group or removes a staff member. In Manage Members, you can see everyone that has registered and joined your organisation, both staff and members.

Once your staff are in Groups, you use Manage Hierarchy to confirm that they are in their correct Groups. You only work with staff as members are excluded. You can now collectively see everyone that has been placed in a group.
If someone has been incorrectly placed, they can be moved. The move supercedes their password placement.

So in Manage Hierarchy you only see your staff that are already in Groups. If someone is missing, you will need to find them using Manage Members.

To change the status of an Owner/Director, you will first need to add another Owner/Director - as there must always be one.

NB. The Owner/Director can only be changed or removed in “Manage Hierarchy”.



Once you have created and placed staff into Groups, you can now confirm if they are all in the correct Groups.

NB. Every Staff member must belong to a Group

If a staff member is not in a Group, you will not find them here.
You will need to search Manage Members and then move them into a Group. Mange Hierarchy only manages staff members.

View Position helps you confirm that a Group is correctly filled. If a Staff member has been placed into the wrong Group they can be moved using “Change position”.

Groups can be added or deleted in the Manage Groups page.

A Group cannot be deleted if there are people in it.

In Manage Members, you see everyone who registers and can move a Member into a Group. .

You must also manually ADD all individuals that will need to access the web site.
If a staff member leaves your organisation, you can change their status from Staff to Member. They will then lose all their administrative rights.

In Manage Hierarchy, you don’t see the public but can sort your staff more accurately into their groups.
To replace an owner, you must first add the new owner, then change the status of the current owner.

Step 4 Create Passwords

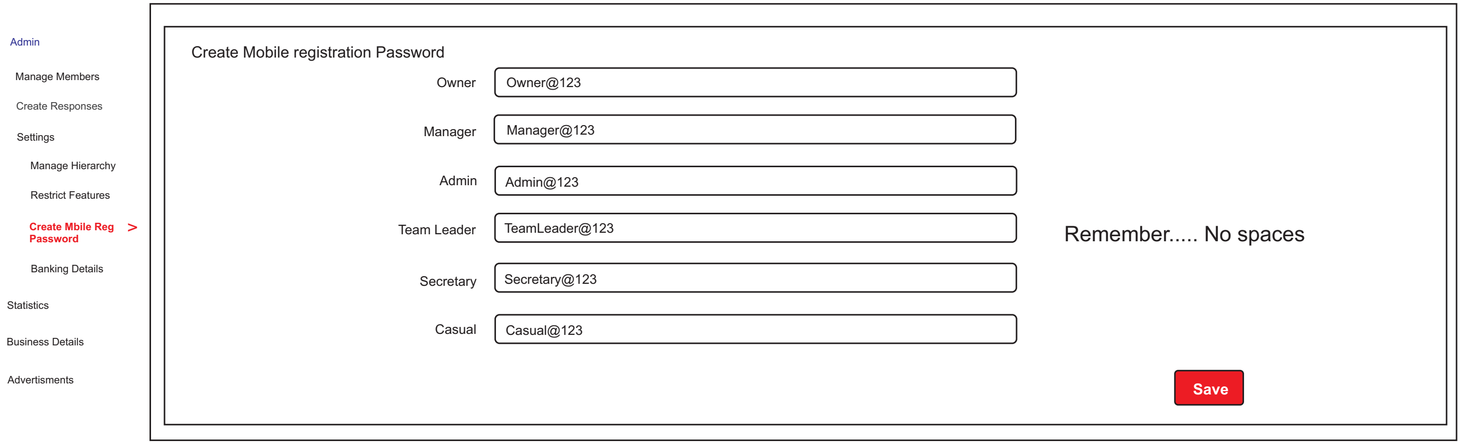
You will now need to assign unique Passwords for each Group. ADMIN > SETTINGS > CREATE MOBILE REG. PASSWORD.

To make life easier, we have used the names of each Group you created, as part of the name of the password.
When creating a password, please check that each password is 7 - 15 characters long, has a number, special character and there are no spaces.

We recommend that to start with, use our passwords.
Once all your staff are in their correct Groups, you should change the passwords to prevent others sharing and joining the wrong Groups.

The change of password will not move an individual out of a Group.

Create Mobile Reg Password



Every Group must be assigned a password. This is for your security, to prevent outsiders from seeing internal related conversations.
A password is also how you give or exclude administrative access.
A password must be 7 or more characters long and include a number and special character.

Any person who enters the correct code from their phone, will be placed into that Group, according to the password.

If you move them into a different Group using the Manage Hierarchy or Manage Members, they will adopt the “Restrict Features” of that Group.
If they then enter their old password they will be placed back into that Group.
Once everyone is correctly placed, change all the passwords, so as to avoid people sharing passwords and jumping around.
Changing the group password has no affect on their login password.
Manage Hierarchy is an easy way to manage and view who is in which Group.
An individual can only be in one Group, so create your groups carefully.

Certain individuals can be in their own Group - like the Owner.

Congratulations

You have created all the necessary groups to place your staff.
You have added the Owner/Director and Manager.
You have ticked the relevant administrative permissions, relevant for each group.
You have created a unique password for each group.
You have successfully completed the setup.

You can now activate your account.

If you selected the 7 day free trial, your organisation will be immediately visible and active.
If you opted for the subscription, we will first need to confirm payment before
we activate your account. This may take up to 3 days, so activate the 7 day trial first.

Once your account is activated, you can invite your staff to join.
You don’t want to invite the public just yet, as scrolling through 1000's of names
looking for your staff who didn’t register correctly, will be more difficult.
Use “Manage Members” to place those staff member into their groups.

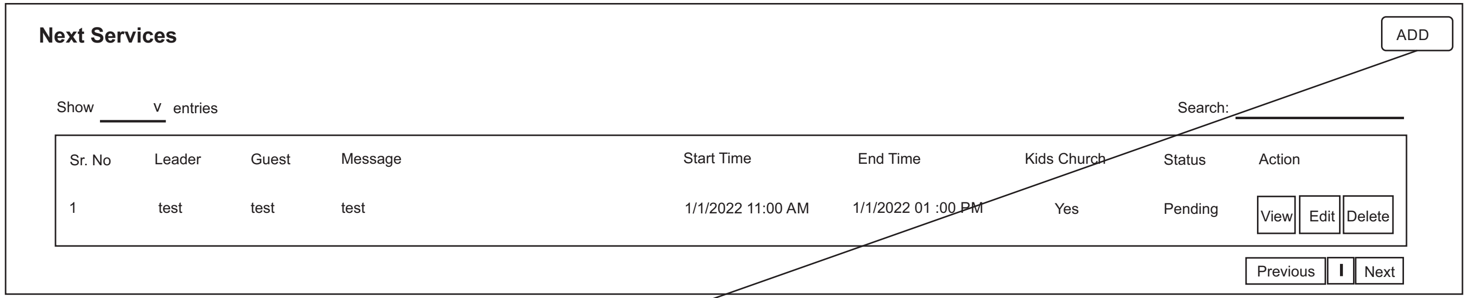
Once you are satisfied, you can invite the public to join.

The next few pages will describe some of the screens used to post information.

We have left the best for last.

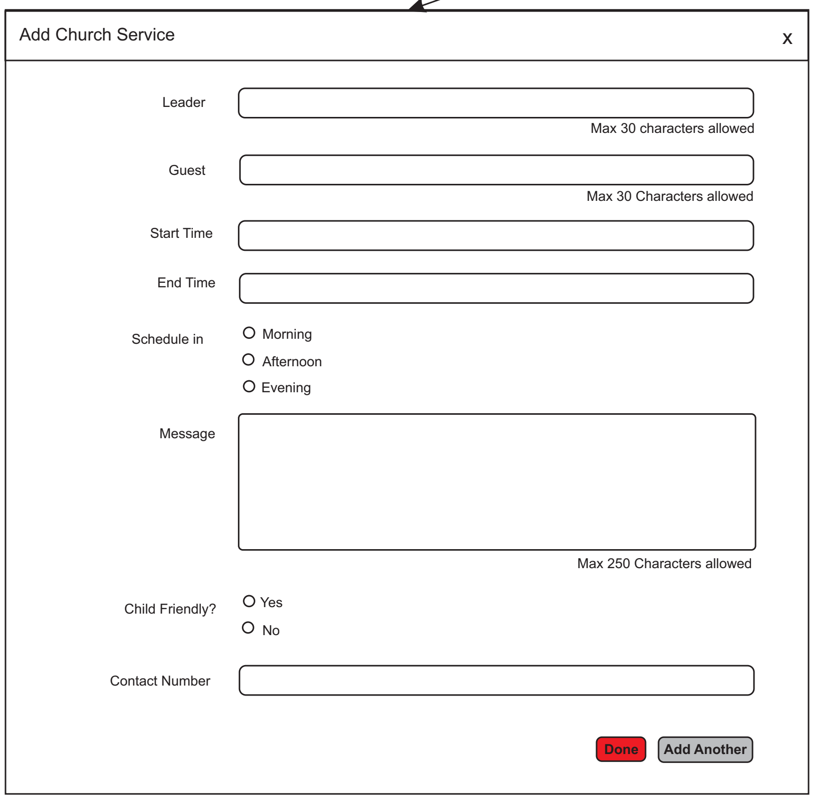
Next Service (This feature is only for Churches.)

Here you post your next services, stating, who will be preaching, if there is a guest speaker, what time etc.
You can create multiple posts as they will scroll on the mobile. Expired posts will not be visible on the mobile app.



All communication screens have a summary page.

Any future dated posts can be edited or deleted. Once it has been posted it can’t be edited or deleted.



As the heading says:
This is where you upload the basic information of the forthcoming services.

Who will be ministering.

Will there be a guest speaker?

So the congregation can plan their day.

Message: Tell the congregation what the topic of discussion will be.

Just in case you want to bring the kids.

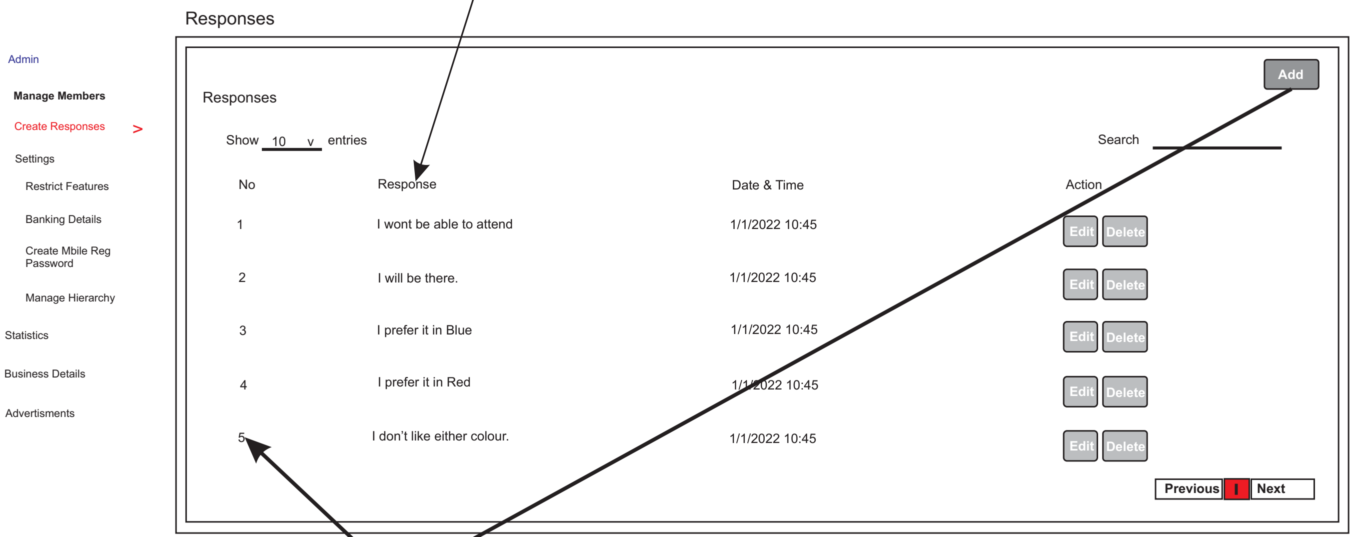
You can add future dated services, so that the congregation can plan their times going forward.

Create a Response

In both Messages and the Notice Board, you get various options as to how you would like the recipients to answer.
Create a response, is an amazing way to involve your 1000's of members, without the aggravation of reading each response.
You can ask a question and create a selection of relevant responses.
We will create a report counting how many of each selection, was chosen. So with this feature, you can happily get 100 000 members to reply to a question.

If the response is not in the drop down list, you can "add" as many as you like. This add feature is available on both the phone and web.

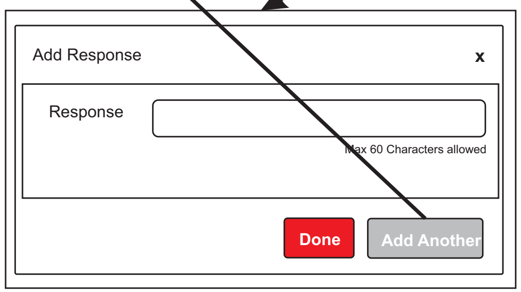
On the mobile you can view the total of the selected responses, in the Results Folder.



When you create a post in Notice Board or Messages, you are able to ask a question and create a selection of required responses.

You will not be bothered with the responses from each individual but will be able to see the collective response totals and %'s. This is extremely useful for surveys and black or white type questions.

Just be careful not to duplicate responses as you will see how quickly the list of responses will grow.

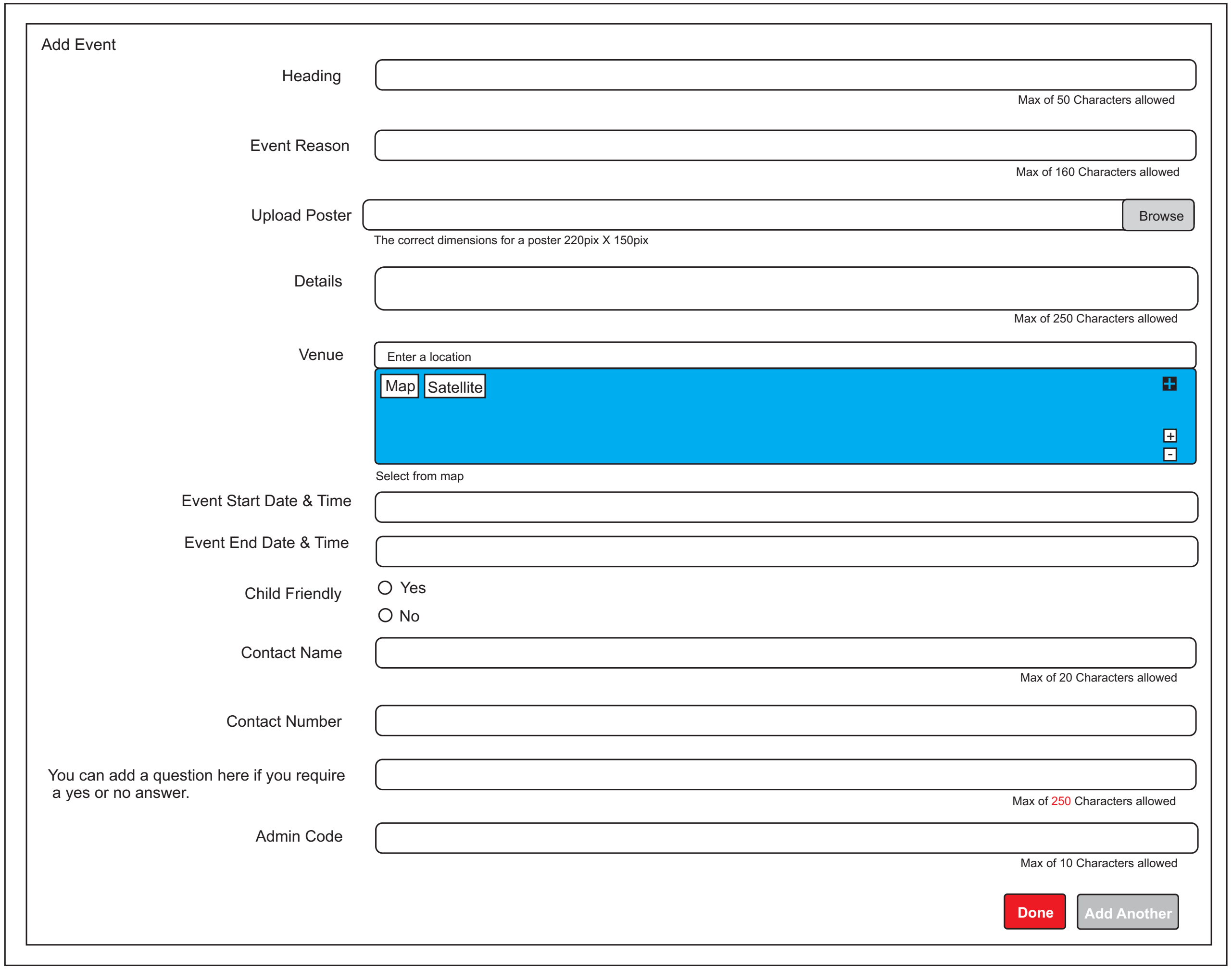


You add the responses required to answer the question you created.

Events I love this feature!

Here you can promote Events that are not necessarily taking place on your premises.
It has a number of great features.
The map is interactive so the location can be added by typing in the address or selecting it on the map.
On the mobile phone, we will direct the user from their current location to the events location, and display the approximate distance.
The administrator can ask a question requiring a yes or no answer, and view the results as a survey.
That's useful if you want to know who will be attending, or possibly who can help with transport or catering.
If the event is for a specific charity, the user can view that charity's banking details. The banking details will need to be loaded by the Owner or Manager.
There is a place for a code, which allows a non staff member to edit the post using their phone.

Event



Enter a heading that will draw attention

Briefly explain why

Upload a relevant poster that is visually appealing.
The optimal dimensions are given.

Tell them what to expect

Enter the address

Select the map button, then zoom in to the correct location
Click once to set the PIN.

When the event will start and end

Are there children facilities

Organisers name

Organisers telephone number

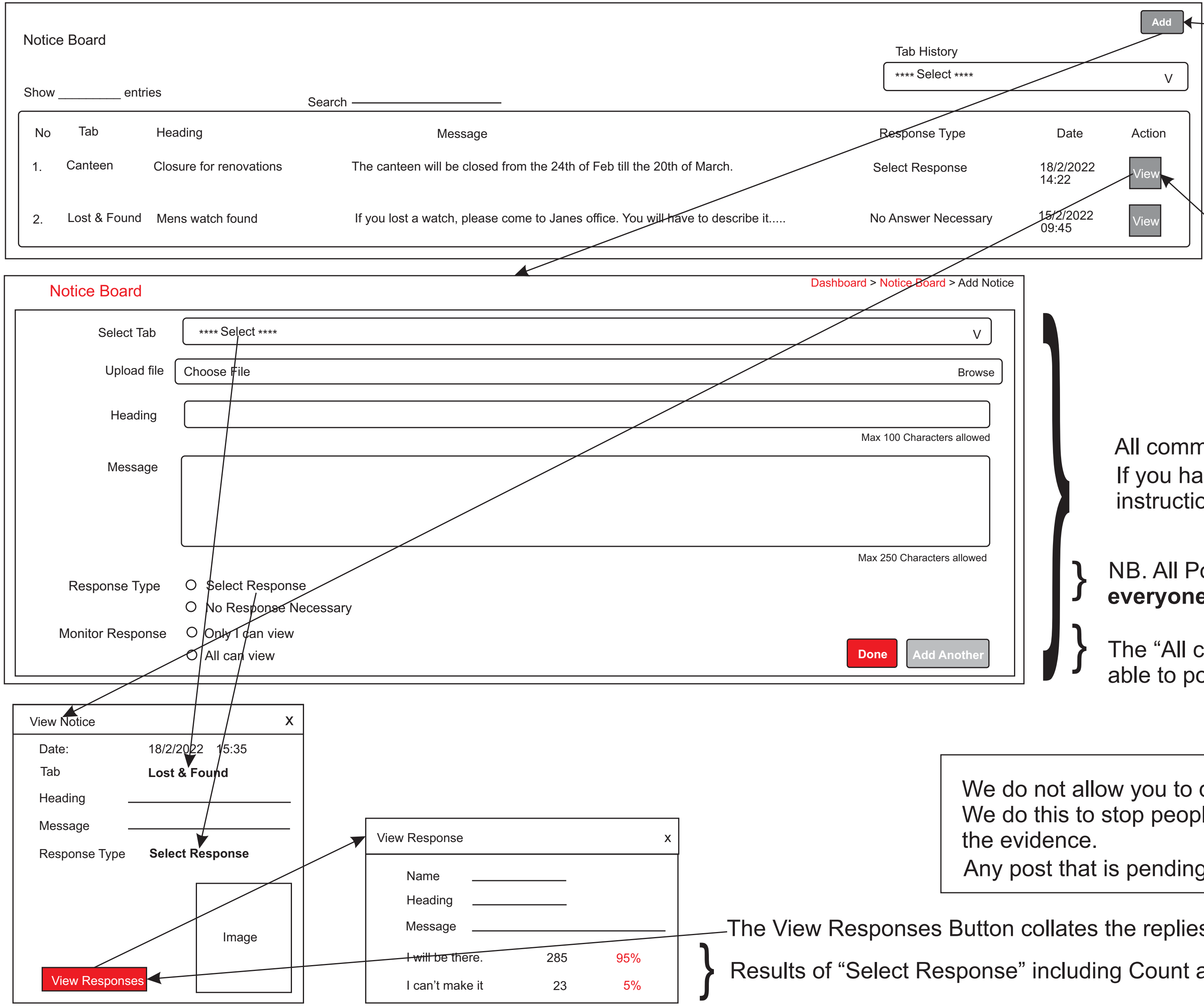
For a quick survey, ask a question requiring a Yes or No answer

This code is shared with anyone who may need to edit this event.

Notice Board

You already created some TABS during the registration process.

All TABS must be unique. There can only be a maximum of 6 active TABS, but tabs can be activated or suspended as required.



Select the **Add** button if you would like to post something new.

All communication screens have a summary page.

The View button displays the post.

All communication screens are easy to fill in. If you have followed the registration and setup instruction, you won't struggle.

NB. All Posts on Notice Board are shared with **everyone**. So we limit the response types.

The "All can view", only includes staff that are able to post..

We do not allow you to delete posts that have gone live. We do this to stop people posting messages then deleting the evidence.
Any post that is pending, may be edited or deleted.

The View Responses Button collates the replies.

Results of "Select Response" including Count and %

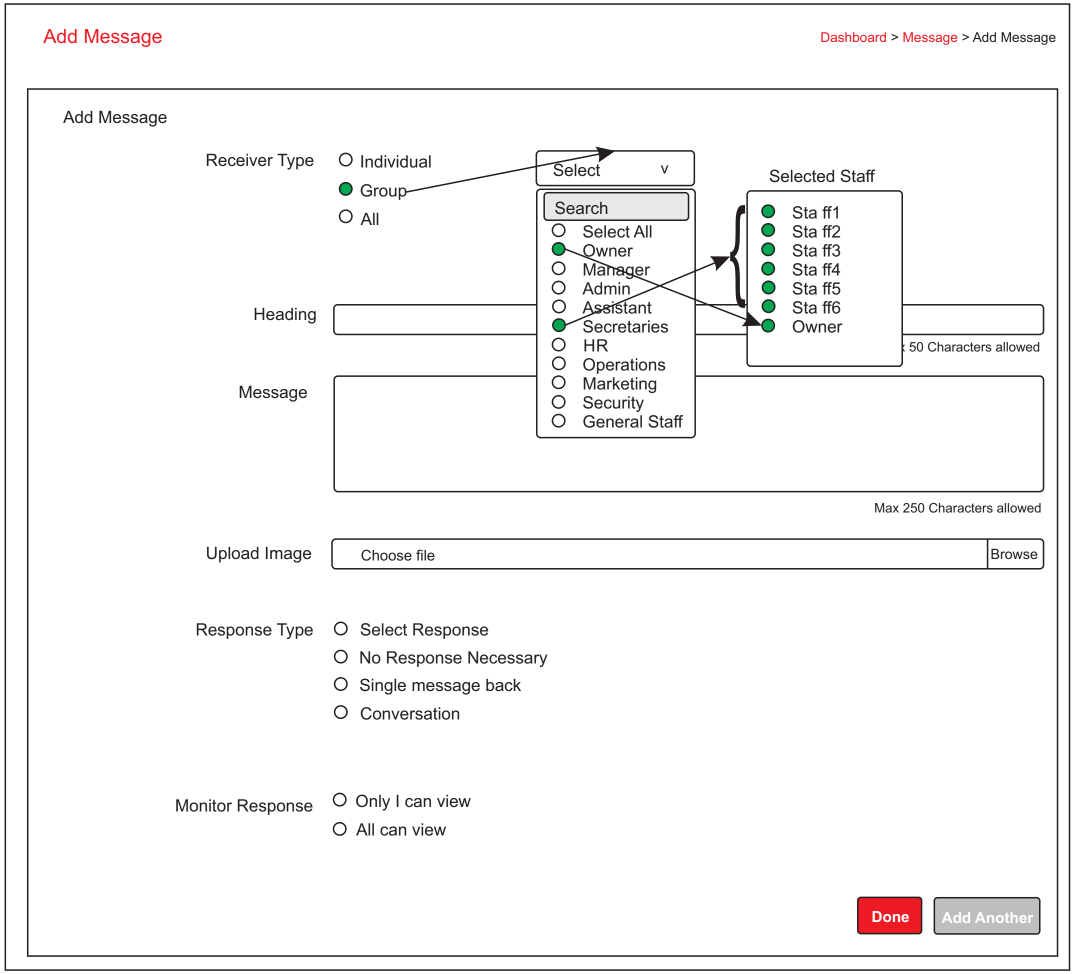
Messages

While In4mant is a communication app, we need to be careful with what we allow and don't.

Messages can be sent internally to individual staff members or to Groups. ________

They can message everyone (staff and Members), but we limit the response types to either "No reply required" or "Select a Response".

We do not allow Sports clubs, Unions and Agencies to message individual Members.



The Message purpose:

For Internal communication with staff & groups.
To Message ALL (staff and members), when the topic is unrelated to any Notice Board tab.

You can message one or multiple Groups. The individuals in each group will appear on the right. You can unselect an individual if you don't want to include them.

You can message everyone. This includes both public and staff, but there are restrictions, as we only allow "No response necessary" or "Select a response". We believe it may be reckless to get into a conversation with thousands.

Churches, however can message an individual member.

Depending on who you are messaging, these are the reply options.

Select Response. Your message will contain a question with optional answers, of which only one can be selected. E.g. Will you be able to make the meeting today? Responses: YES or NO. instead of viewing everyone's responses, we collate the responses by counts and calculate the respective %'s.

No Response necessary, is used when sharing information and you don't require a reply.

Single message back. This is only available for internal company communication, where you want to avoid a discussion - as you may just want information.

Conversation. This is only available for internal communication, except for churches where the pastor may want to contact a member of his congregation.

Monitor Responses, allows you to decide if the response is for your eyes only, or for all the staff members included in the message.

Advertising

I bet this feature surprises you.

As we understand that times are difficult, we have given you the opportunity to create passive income.
On the mobile app you will notice that at the bottom of most screens there is a block that says “Space not yet available”.
These advertising blocks will become available as your membership % grows.
The quicker you get your staff and members to join, the sooner will you be able to earn passive income - by selling this advertising space to your community.
The first advertising block activates when you reach your first milestone of 24%.
You will receive an E-Mail advising you when you have reach your qualifying threshold.
The revenue generated will far exceed our monthly subscriptions, so you get a communication app that is useful and makes you money.
Each communication screen will enjoy greater or lesser exposure. For this reason the recommended amounts to charge will vary.

Add Advertisement

Dashboard
Admin
Statistics
Business Details
Advertisments >

Add Advertisement

Qualified Positions: Please select qualified position v

Month: ○ 1 Month ○ 2 Month ○ 3 Month

Client Cost: 0

Upload File: Choose file.... Browse

Name

Contact Number

E-Mail

Website

Placement	Screens	Cost	Availability

No Advertising blocks are available yet

You will be able to see what advertising blocks are available and at what cost.
Please select the one that the customer prefers.

The customer can advertise up to 3 months at a time.

The customer can see what each block costs.

Upload their logo with a brief description.

Your customer <u>uses</u> their name as a ref in their deposit so you can confirm payment and activate the advert.

Fill in the customers details

Date	Status	Website	Action
13/5/2022	Active		Edit Deactivate
23/5/2022	Active		Edit Deactivate
13/6/2022	Pending		Edit Activate

Summary and activation.

Once the amount reflects in your bank account, you activate the advert here.

General:

Take a look at your LOGO on the mobile to confirm that it fits and looks great.
The recommended dimension are given on the first page of BUSINESS DETAILS.

Don't forget to add your banking details.