wellbee

Manual

Version 1.5

Onboarding

Functions

Settings

Contact

Onboarding

Roles

User

The user is the one who receives support. They can log in to the app and on the web. The user can always access all information in their own account and add or remove planners.

Planner

Admin planner - Can create content for the user. Can also invite and remove planners from the group, distribute admin rights and limit which functionality "regular" planners should have access to.

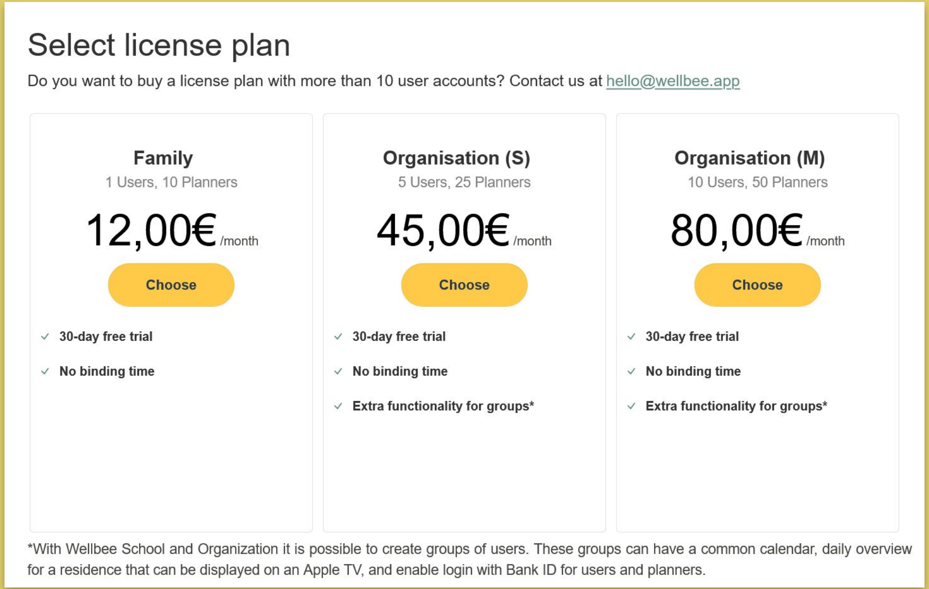
Planner - Can create content for the user.

Super admin

This role only exists if you have an organization license. The super admin can via the organization settings on the web administer accounts for users and planners. A super admin can also have the role of planner.

Create account

- Go to wellbee.app/licenses and select the license type you want.
- The organization type license plans include additional functionality for groups (read more about that in our organization settings manual).
- If you want to create an account that includes more licenses for users and planners, contact us at hello@wellbee.app and we will help create a customized solution for you.



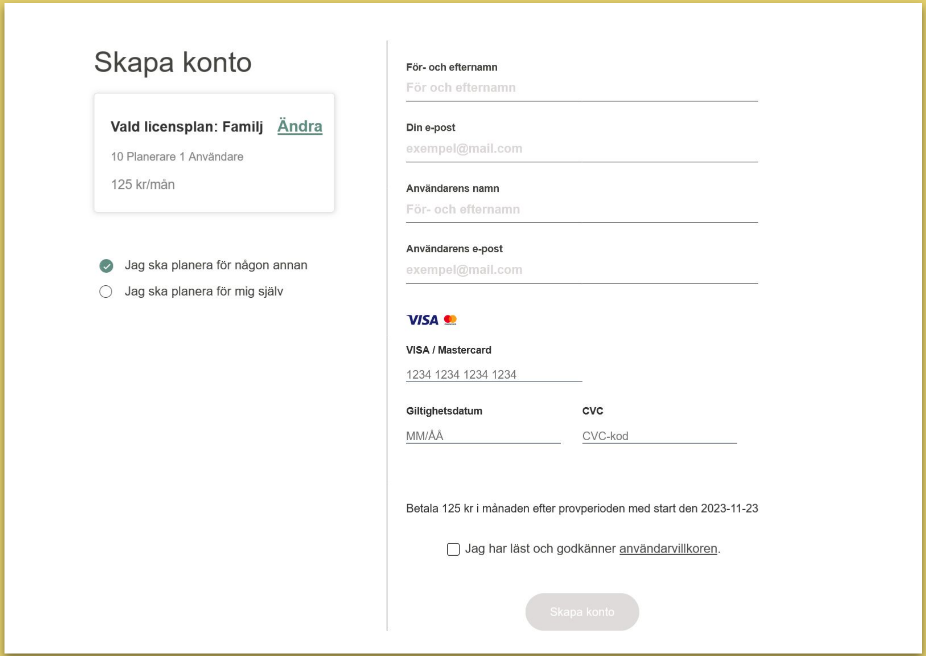
Create account

- Choose whether you want to plan for yourself or for someone else. If you select "*I want to plan for someone else*" your account will be of the **admin planner** type and you invite a person to plan for when you enter your account details.

  If you choose "*I want to plan for myself*" then your account will be of the type **user** and you can invite planners afterwards if you want.

- Enter your card details, accept the terms of use and click "Create account".

- A welcome email will now be sent to the email address or addresses entered with a link to set a password.



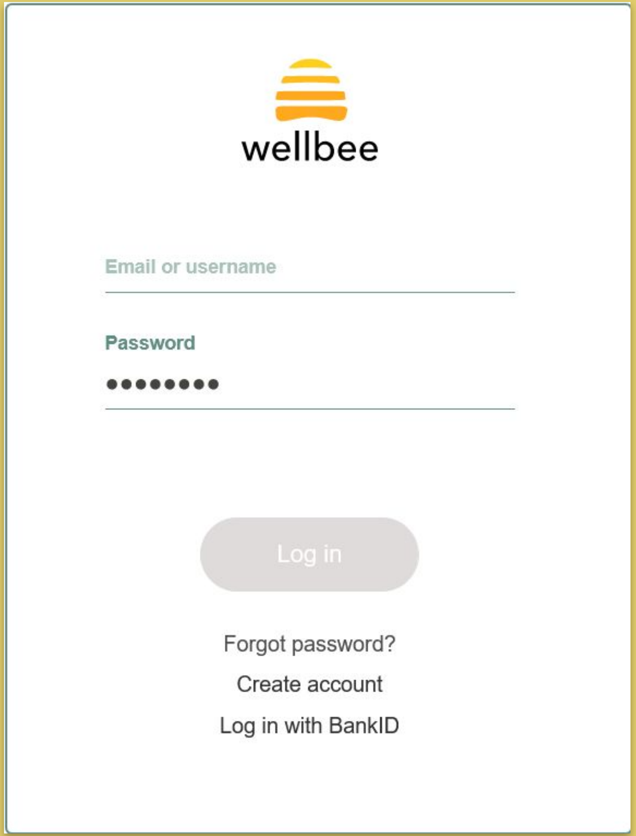
Log in and forgotten password

Log in

1. Go to wellbee.app/login
2. Enter your email (users can also log in with a username)
3. Enter your password
4. Click “Log in”

Forgotten password

1. Click “Forgot password?”
2. Enter your email address and click “Send”
3. You will now receive an email where you can choose a new password and then log in



Add users

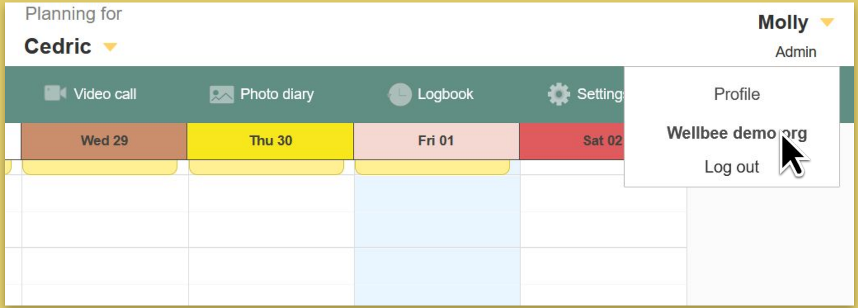
Organization license

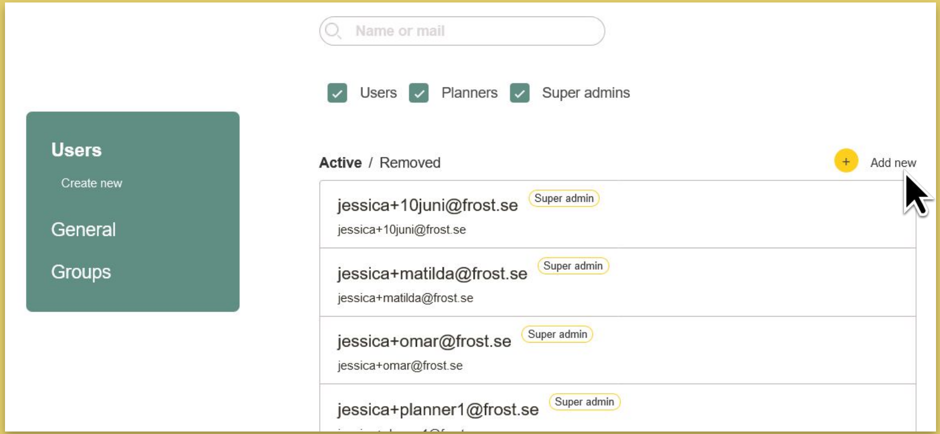
1. Log in as a super admin for your organization and go to organization settings. They are located in a dropdown in the menu at the top right, click on your organization's name.

1. Click "Add new" and make sure the "Create user" checkbox is checked.

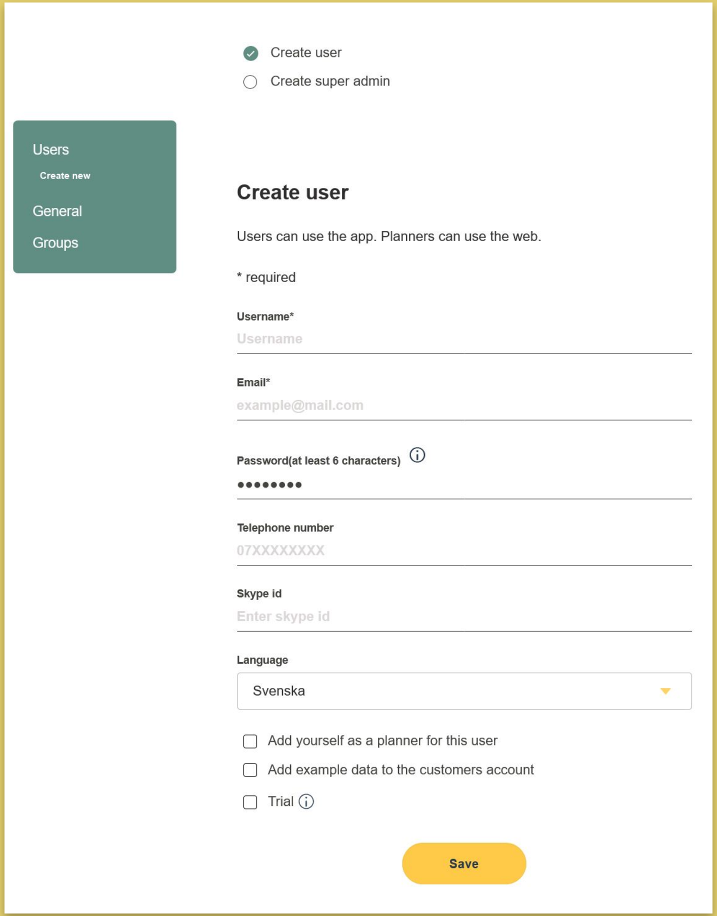
2. Enter the user's username and email (required).

3. Enter a password (not required, if you do not enter a password for the user, they can choose the password themselves)





5. Phone number and Skype ID (not required).
6. Select a language for the user.
7. Select if you want to be a planner for the user (it is possible to add planners later as well).
8. Select whether the account should be prepared with some sample data. If this is selected, it adds pre-created checklists and activity templates that can be used for testing purposes.
9. You can set a trial period for the user to keep track of how long they have been using Wellbee. The account is not closed when the trial period has expired but is flagged internally for follow-up.
10. Click “Save”. The user should now be visible in the list of all accounts within your organization and should have received an email that they have been invited to your organization.

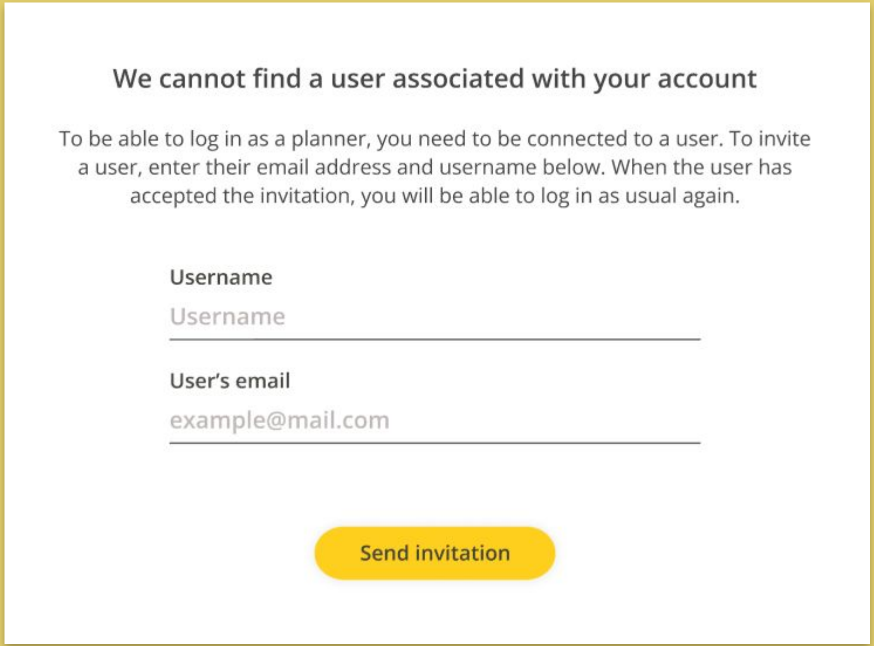


Add users

Family license

A family license only allows for one user and it is therefore not possible to invite more users to your group.

In the event that the user's account is deleted, there will be no one to plan for and you will no longer have access to Wellbee as a planner. The next time you log in, you will have the option to invite a new user and then you will have access to Wellbee again.



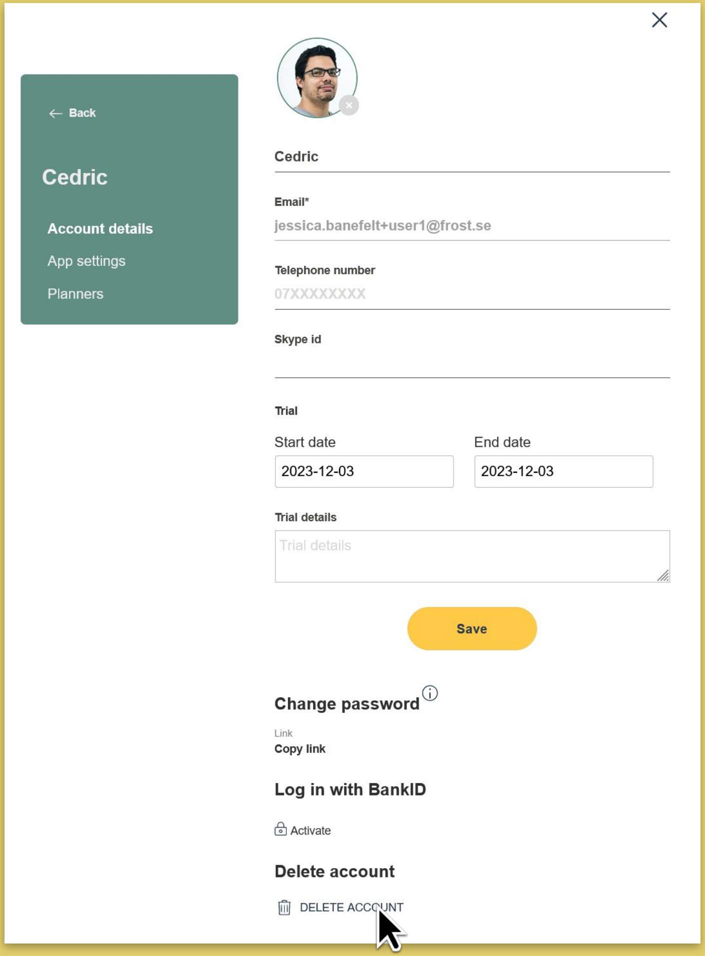
Remove users

Organization license

If you have an organization license, you can delete accounts for both users and planners as a super admin.

1. Log in as super admin and go to the organization settings
2. Click on the user you want to delete in the list.
3. Click on “Delete account” and enter your password to confirm the deletion of the account.
4. The user receives an email informing them that their account has been deleted.

As a user, you can delete your own account under your profile settings.



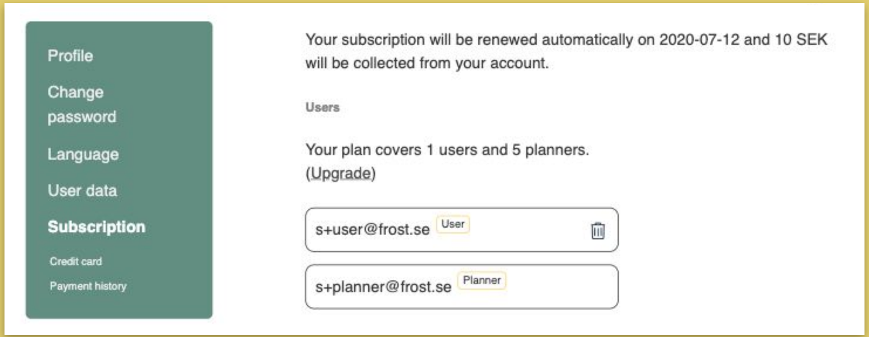
Remove users

Family license

If you have a family license, you as a user can delete your account under your profile settings. Click on “Delete account” and enter your password to confirm.

To remove the user as an admin planner, go to profile → subscriptions. Click the trash can icon next to the user's email address, then enter your password to confirm the removal of the account.

A planner without administrator rights cannot delete the user's account.



Add planners

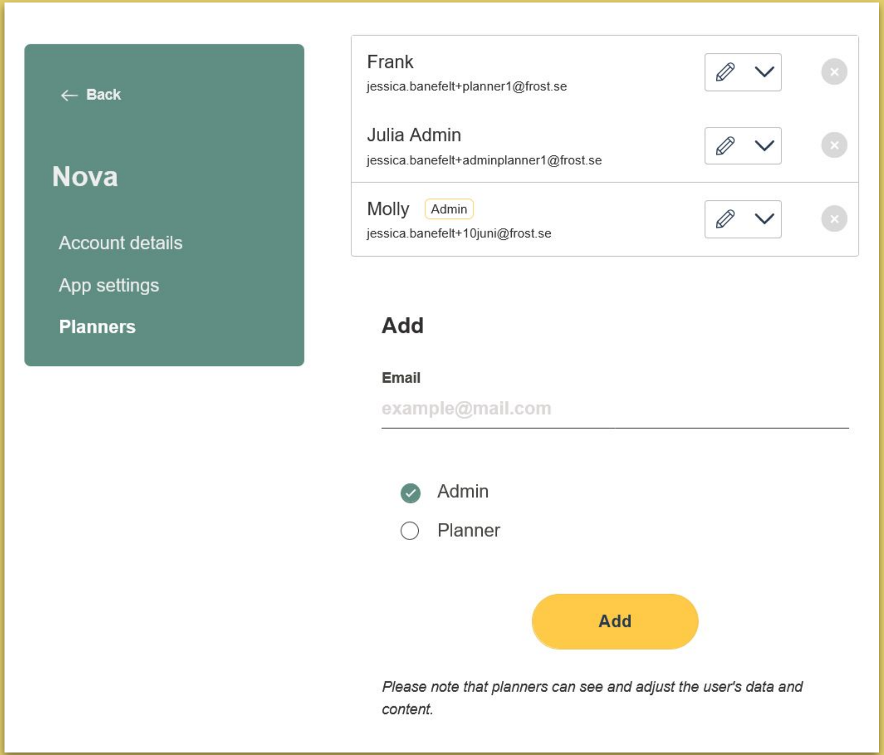
As super admin

If you have an organization license and can log in as a super admin, you can add planners from your organization's settings. As a super admin, you do not have to be an admin planner for the user you want to connect the new planner to.

1. Log in as a super admin for your organization and go to organization settings. They are in a dropdown in the menu at the top right, click on your organization's name.

2. Click on the user in the list that you want to add the new planner to.

3. Enter the planner's email address, choose whether they should be a regular planner or an admin planner, then click “Add”. An invitation is sent to the planner.



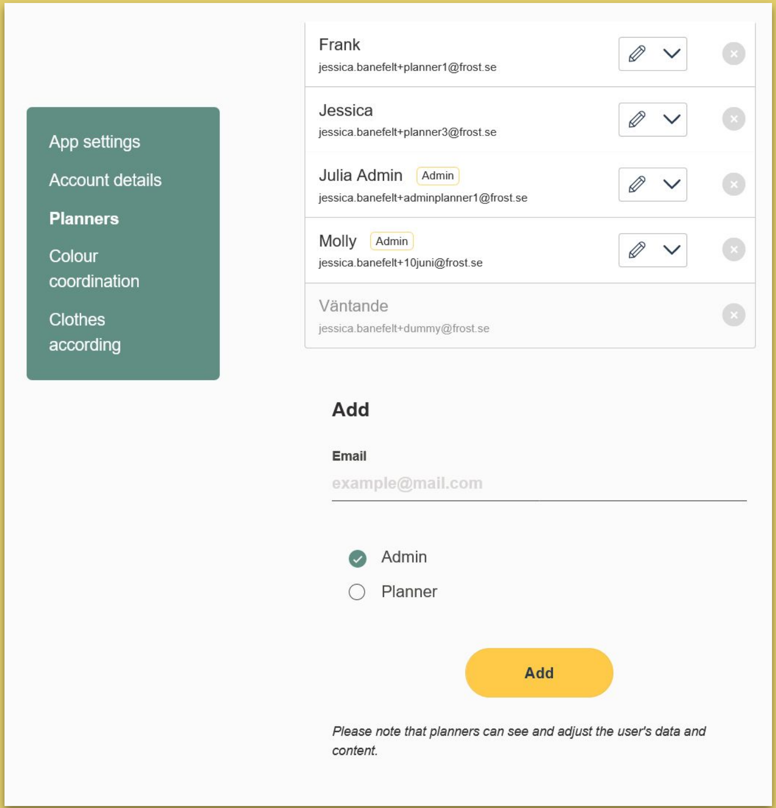
Add planners

As admin planner or user

If you are an admin planner or a user, you can invite more planners to your group.

1. Log into the web and go to Settings → Planners

2. Enter the planner's email address, choose whether they should be a regular planner or an admin planner, then click “Add”. An invitation is sent to the planner.



Remove planners

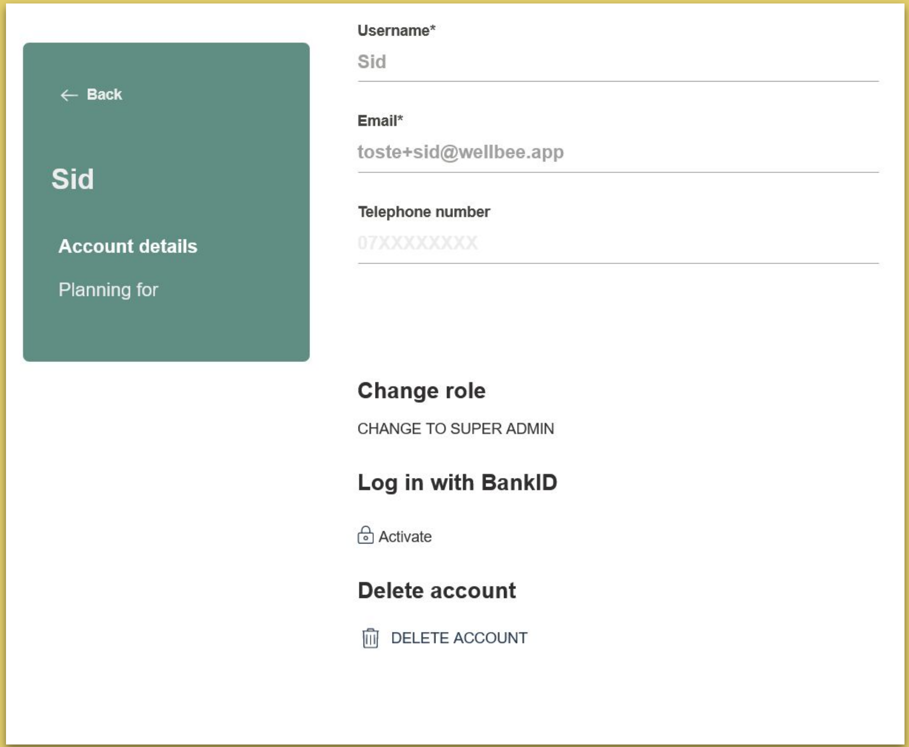
As super admin (from organization)

If you have an organization license and can log in as a super admin, you can remove planners from your organization's settings.

1. Log in as a super admin for your organization and go to organization settings.

2. Click on the planner in the list that you wish to remove from your organization.

3. Click on “delete account” and confirm the removal of the planner by entering your password.



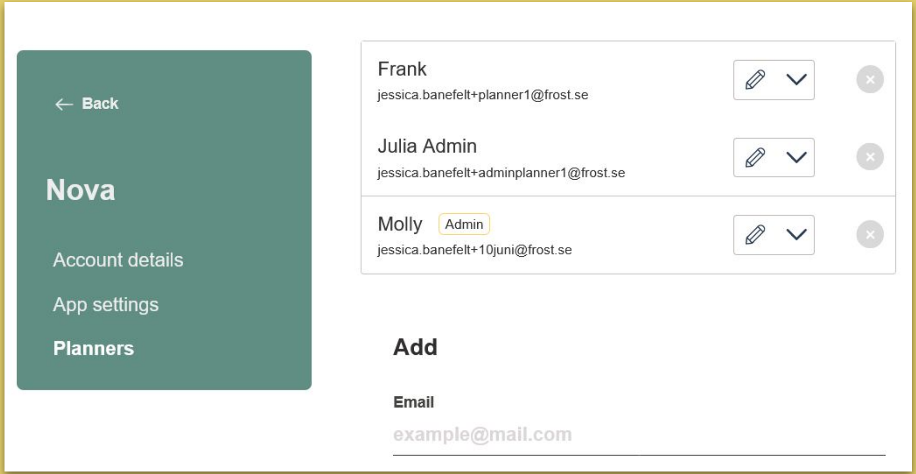
As super admin (from user)

As a super admin, you don't need to be a planner for the user to be able to remove planners from them.

1. Log in as a super admin for your organization and go to organization settings.
2. Click on the user in the list that you want to remove the planner from, then click on "Planners" in the green menu on the left.
3. Click the x symbol in the list of planners to remove them from the user.

As admin planner/user

1. Log in as an admin planner or user on the web.
2. Go to Settings → Planners
3. Click the x symbol in the list of planners to remove them from the user.



Functions

Calendar overview

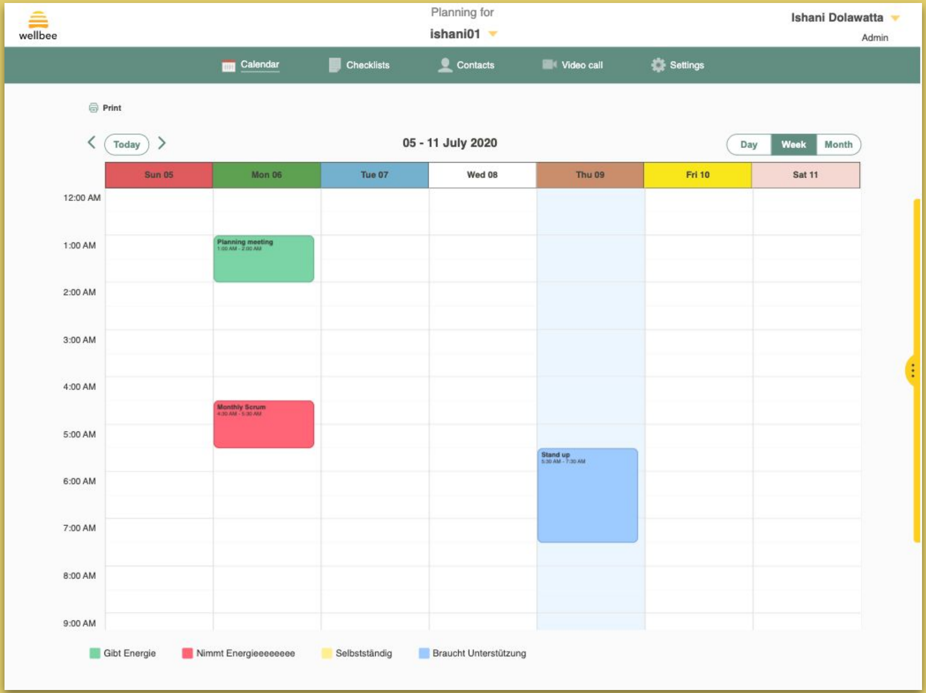
The calendar shows the planning for a week by default but it is also possible to show one day at a time or an overview of an entire month.

Activities are displayed with the color coordination they may have been assigned. At the bottom of the page, the explanation for what each color symbolizes is shown. Colors and their meanings can be adjusted under Settings → Color coordination.

A padlock icon on an activity means that only the user themselves (if the user created the activity) alternatively the user and one planner (if that planner created the activity) can see any information about it. Other planners only see that the user is busy at that time.

Activities that the user has marked as completed are marked with a tick.

To print the calendar, click on “Print” in the top left corner.



Create new activity

Click anywhere in the calendar to add an activity. The "Create activity" view opens, where you can customize the activity to the user's needs.

Title (Required):

The text entered here is the one visible in the calendar.

Date/From/To (Required):

The date and time when the activity takes place.

Image/video/sound:

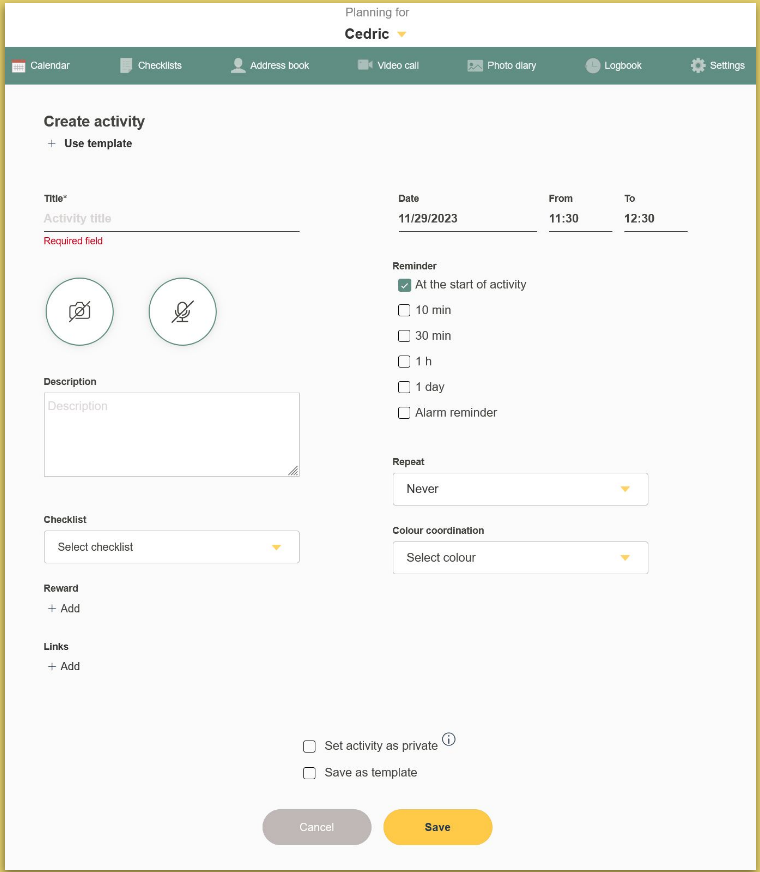
Upload an image/video/sound or choose from Wellbee's media library.

Reminder:

Time when push notification is sent to user, possible to choose one or more options.

Description:

Additional text that is visible when clicking on the activity.



Functions

Repeat:

Create an activity that recurs, e.g. Mon-Fri.

Checklist:

Link a checklist to the activity. The checklist needs to have been created prior to adding it to an activity.

Color coordination:

In which color the activity should be displayed.

Reward:

If added, text + sound is displayed/played when the activity is marked as completed in the app.

Links:

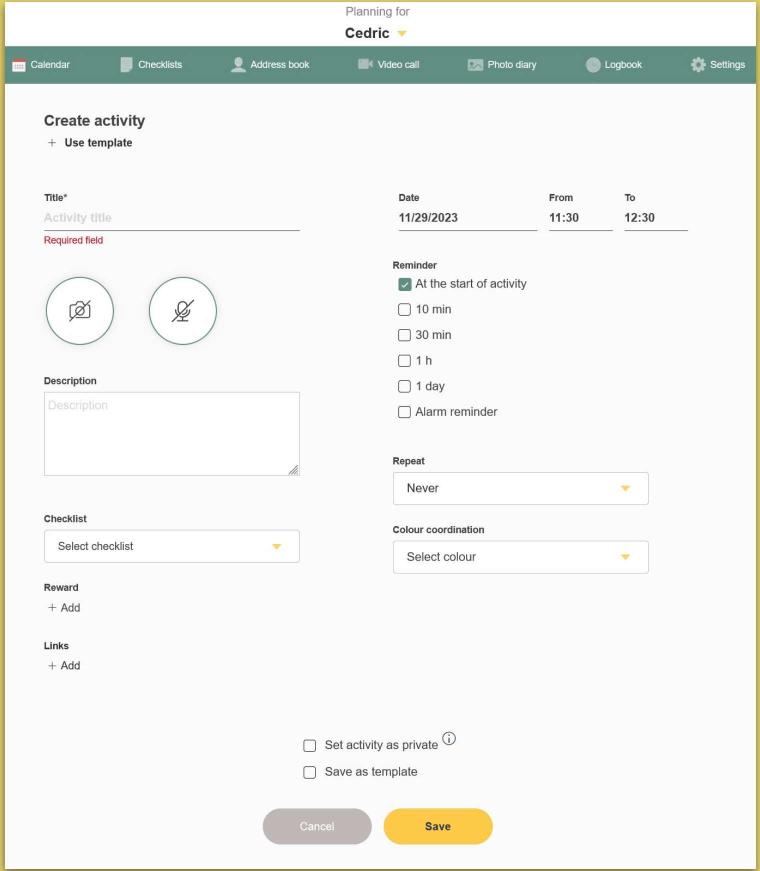
Add a link and give it a title. The title will appear on the activity and be clickable.

Set as private:

If made private, the activity will only be visible to the planner who creates the activity and to the user.

Save as template:

Saves the activity as a template that can be reused in future.



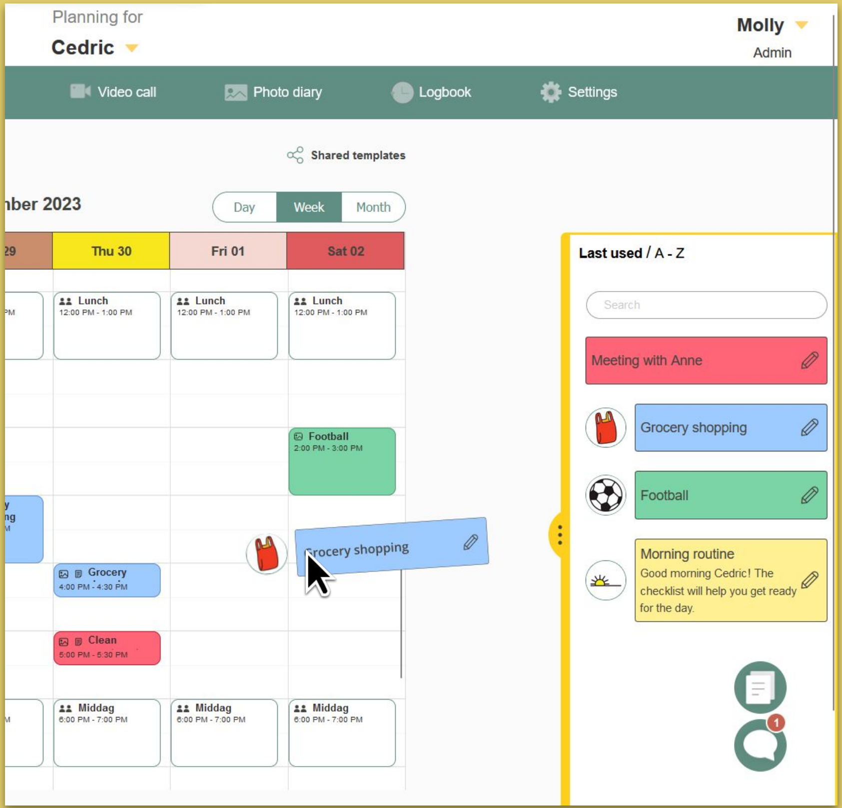
Create activity from template

When you save an activity as a template, you can easily reuse it at a later time.

The templates end up in a list that you find in the calendar. Press the yellow frame with the three dots on the right and a menu will expand.

To add an activity from the list, hold down the mouse button and drag a template to the desired location in the calendar.

You can edit individual activities after they are placed in the calendar. If you want to edit an entire template, press the pencil icon on the template while it is still in the list.



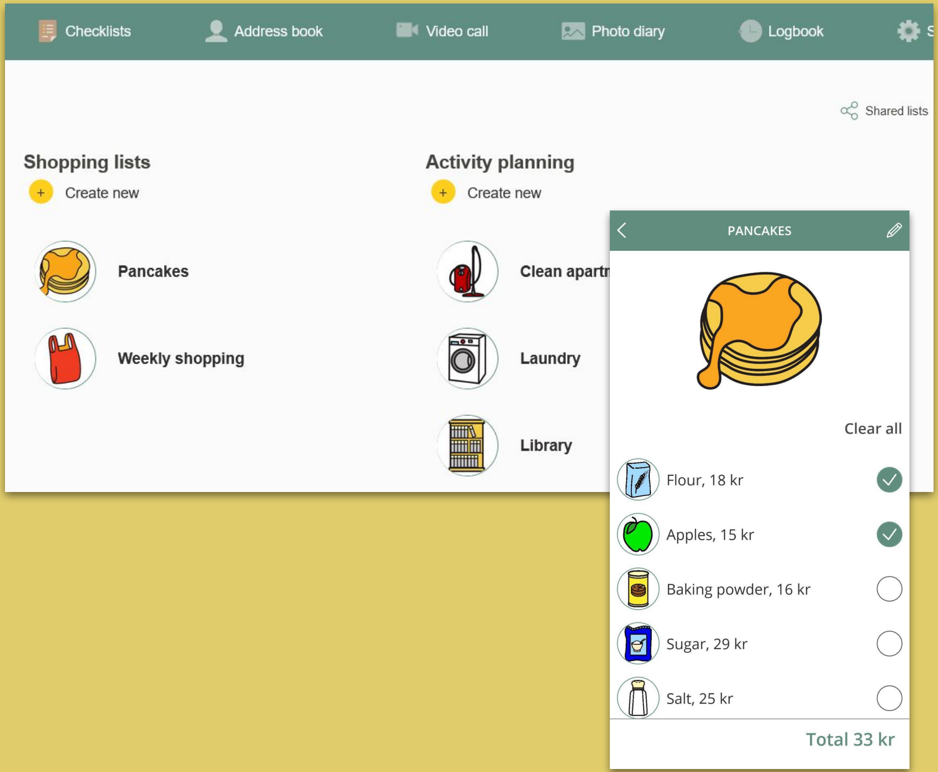
Checklists

There are two different types of checklists: **Activity planning** and **Shopping lists**. The only difference between them is that all items in a shopping list have a price attached to them.

Checklists can be created both in the app and on the web. They are available under the menu option "Checklists" but can also be linked to activities in the calendar.

Within an organization or family with several user accounts, it is possible to share checklists you have created with others within the group. Go to the checklist you want to share, check the option "Share checklist" and save.

The checklist will now be available under "Shared lists" for all users within the organization/family.



Create checklist

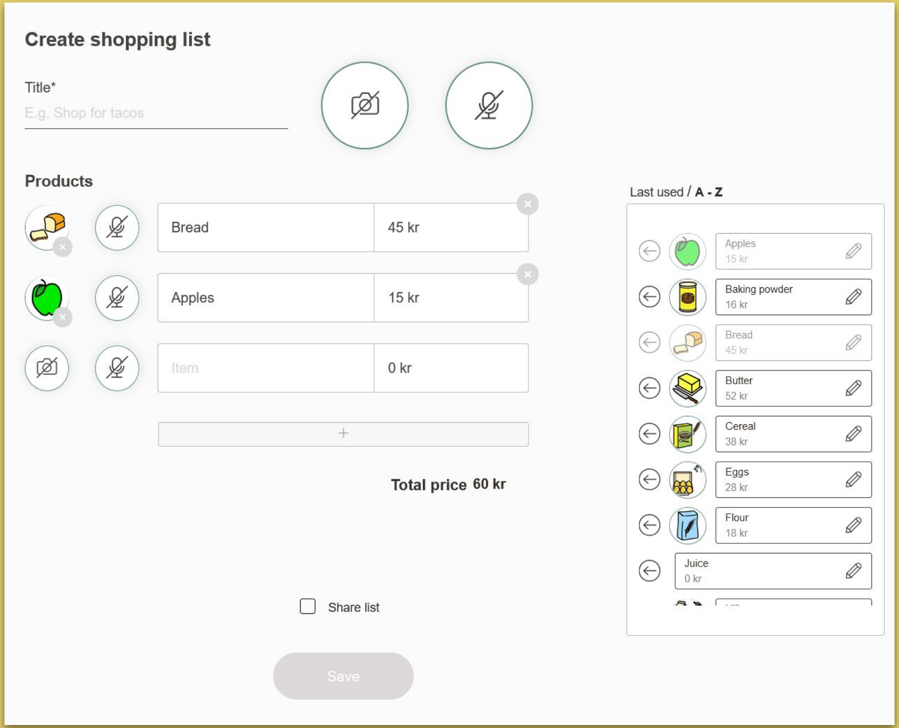
To create a new checklist, go to “Checklists” and click “Create new”.

Enter a title for the list (required). You can customize the list with a cover image, video and/or audio file (optional).

To create a list item, fill in the name of the item/activity and a picture, sound and price. Then click the plus sign button below the list item to add more.

If you create a shopping list, the list items you create are saved in a menu on the right. You can then easily drag these into other shopping lists.

If you create an activity list, there is the option "Add clothes according to weather". If you click on the link, the "Clothes" feature is added as a list item, you can read more about that feature here.



Address book

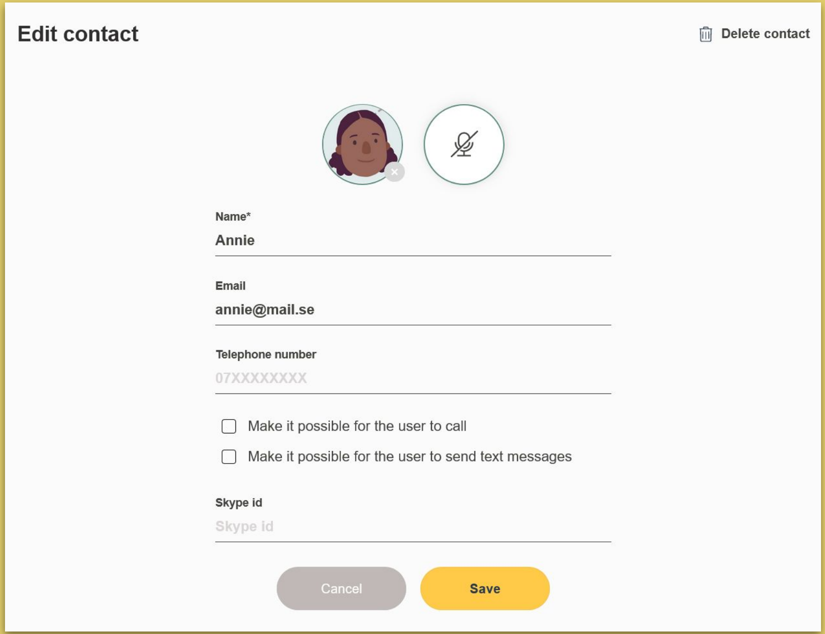
Under Address book you find the contacts that are available to the user under "Contacts" in the app.

Contacts are not added automatically (as in Video calls) but must be added manually.

To add a new contact on the web, go to the menu option “Address book” and click “Add new”. Enter the name of the contact and a picture and sound (if desired).

The information that is then filled in (phone number, email, skype ID) determines how the user will be able to contact that person from the app. If you enter a phone number, you can choose whether it should be possible to call and/or text the contact.

To add yourself as a contact, you can click on “Add myself” and you will then be taken to the page "Create contact" but with your contact details pre-filled.

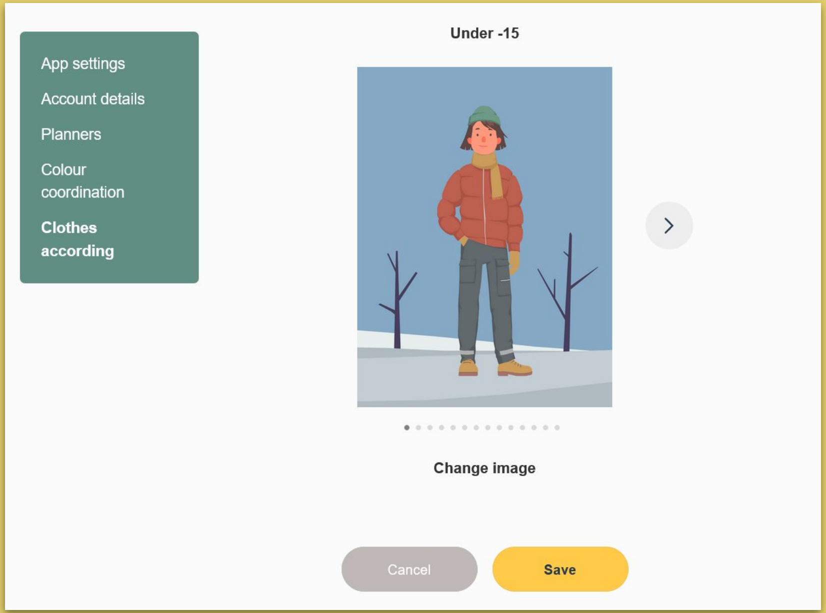


Clothes

Clothes is a function that retrieves weather data based on your location. Depending on the weather and temperature, different images are displayed in the app that show how you should dress if you are going out. It is only available in the app and for it to work, the device's location feature must be enabled.

There are 15 images of an avatar with different outfits. These images can be switched out for pictures of for example the user’s own clothes, if they would like.

This is done from the web under Settings → Clothes → Change image.



Video call

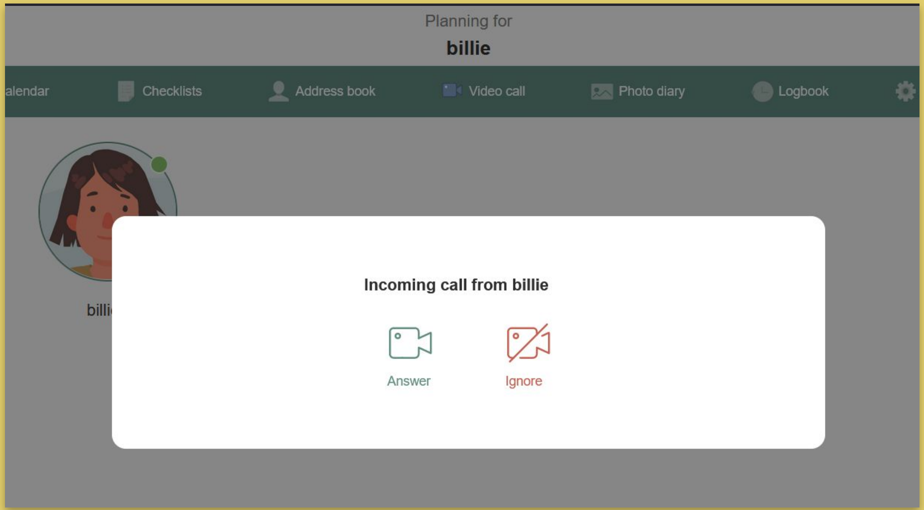
To use the Video call function it must be switched on under Settings → App settings → App functions.

Video calls can be made regardless of where you and the person you want to reach are logged in (app or web).

The user's list of contacts includes all planners who have access to the Video Call feature. In the planners' list, only the user for whom they are planning is listed as a contact.

To make a video call from the web, go to Video call in the top menu and click on the user's profile picture.

If the person you want to call is marked with a green circle, it means that they are logged in and can receive your call. If they are marked with a red circle, it means that they are not logged in and the call will therefore not be connected.



History

To use the History function, the functionality must be switched on under Settings → App settings → App functions.

Under History (called Logbook in the app), events between users and planners 24 hours back are shown. Events that are logged are:

- Missed and received video calls
- Messages
- Activities marked as done
- New uploads to the photo diary

The content of the events is not described, only that they have happened and who did what and at what time.

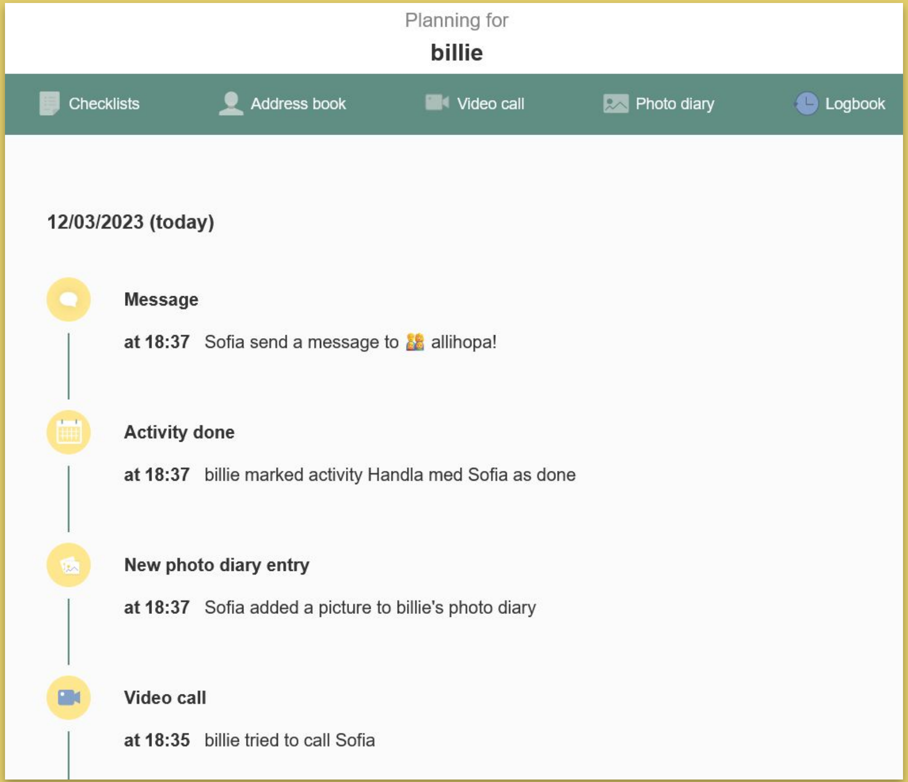


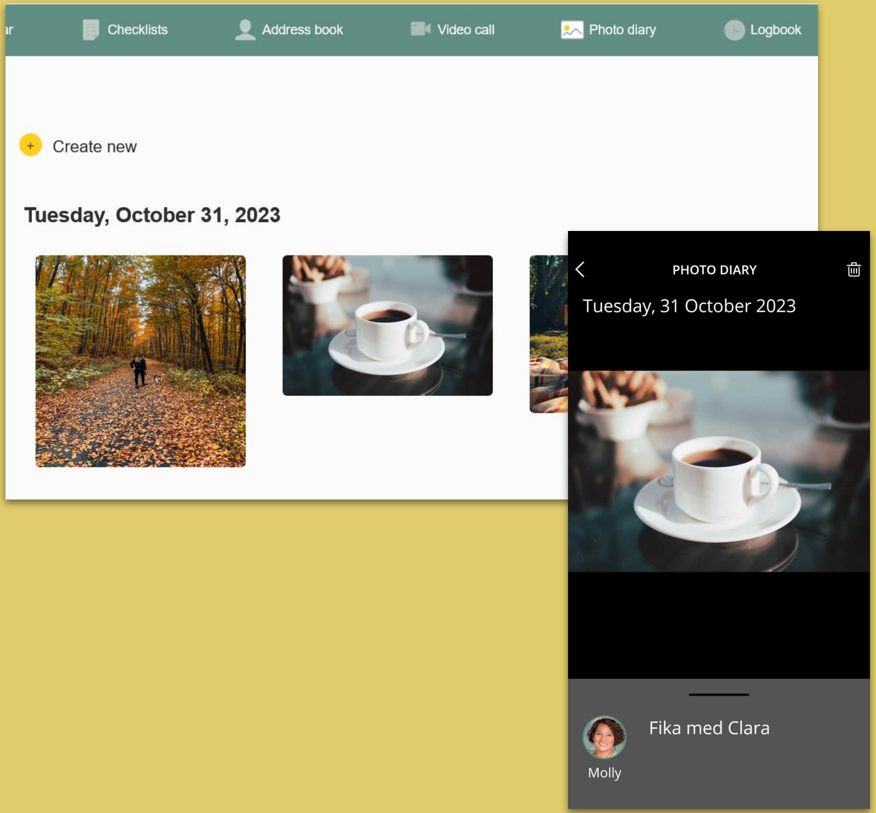
Photo diary

In order to use the Photo Diary function, the functionality must be switched on under Settings → App settings → App functions.

It is possible to upload images both as a planner and as a user, from the web and from the app. All pictures that are uploaded will be visible to the user as well as to the planners who have the right to see the photo album.

To upload an image from the web, go to Photo diary in the top menu and then click “Create new”. There you can select an image that is saved on the device.

When you upload an image to the photo diary, you can also add a description and an audio file. Once the image is uploaded, you can click on the image in both web and app to see it enlarged, read the description and listen to the audio file.



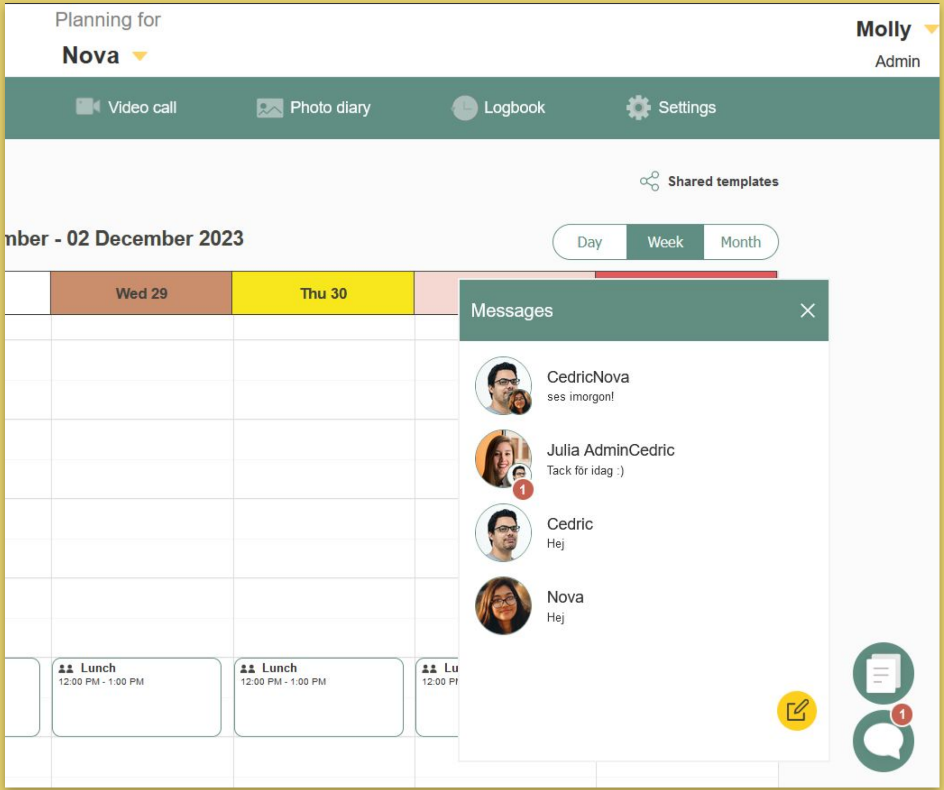
Messages

To use the Messages function, the functionality must be switched on under Settings → App settings → App functions.

The planner can send a message from any page on the web by clicking the floating button with a speech bubble in the lower right corner.

Som användare är det möjligt att lägga till flera planerare som mottagare när man skickar ett meddelande.

Only users can create group conversations with multiple planners. As a planner, you can only send messages to users you plan for or to group conversations you've been invited to by a user.



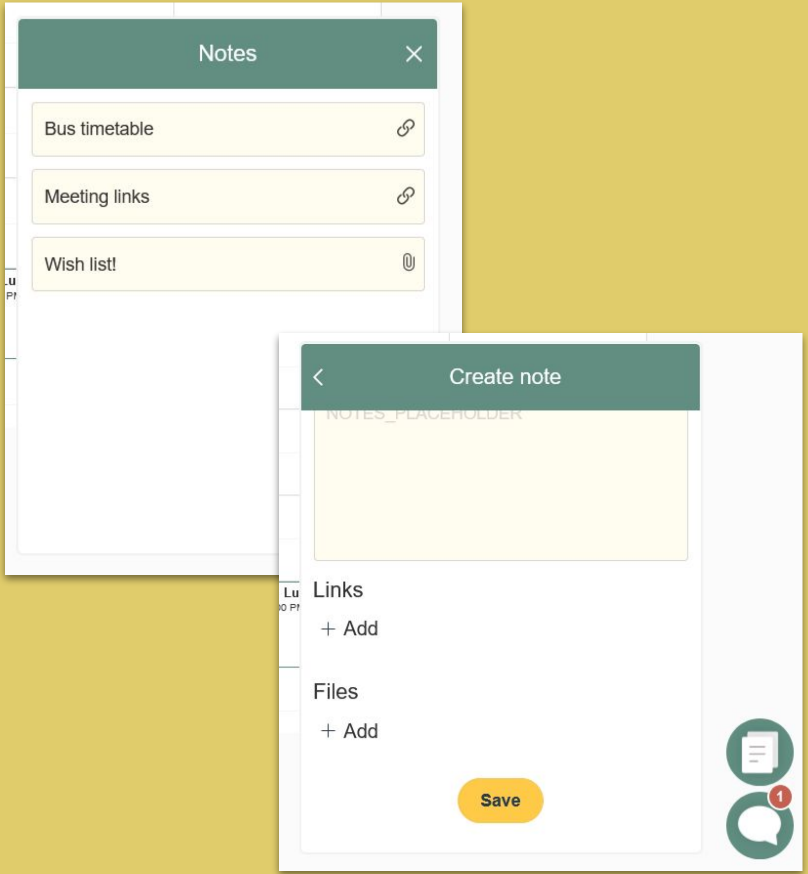
Notes

To use the Notes function, the functionality must be switched on under Settings → App settings → App functions.

You can access Notes by clicking on the floating button in the bottom right corner, above Messages. Here you can write down and share notes with other planners and users within your organization/family.

You can save several different notes on separate "sheets". To create a new note, press the yellow button with a plus sign in the lower right corner.

It is possible to add files and links to a note. Click on "Add" and enter a title, the title is what will appear in the note and when you click on it, the file/link will open.



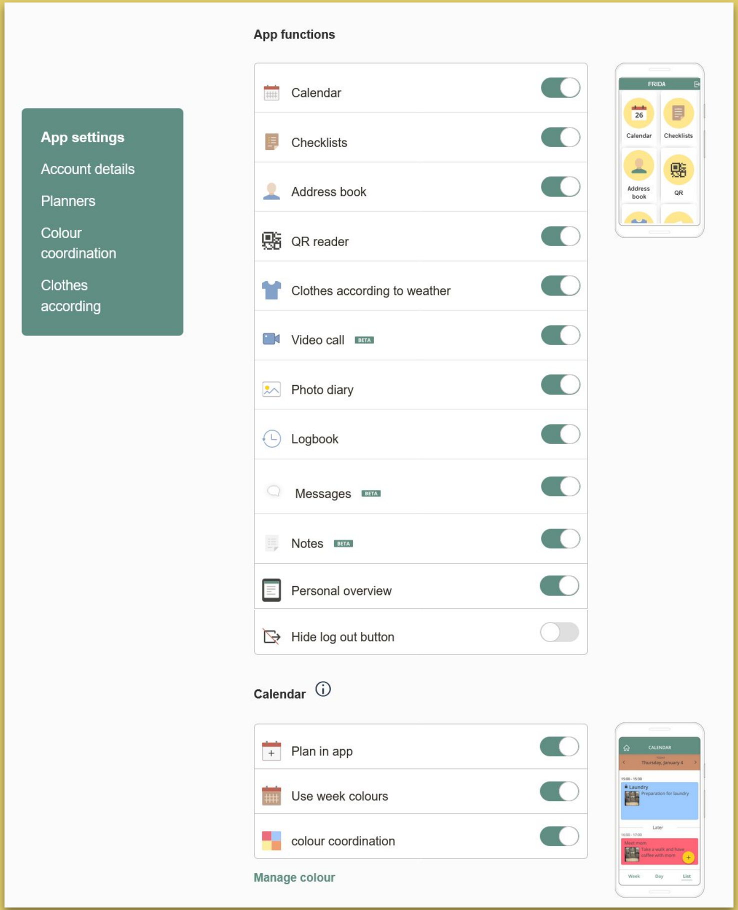
Settings

App settings

Choose which functions should be visible in the app by turning them on or off in the app settings. For the changes to become visible, you need to press "save" at the bottom.

Calendar
In this section you have the option to:

1. Decide whether the user should be able to create activities themselves in the app
2. If the days of the week should be color coded
3. If it should be possible to color coordinate activities



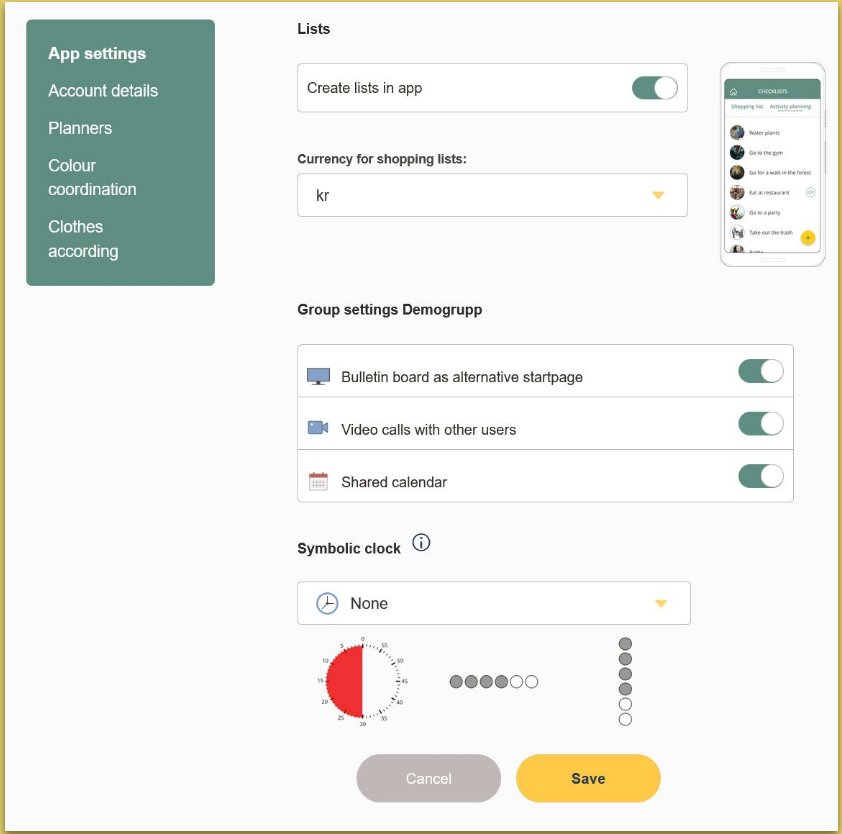
Settings

Lists
Choose whether the user should be able to create checklists in the app.

Currency for shopping lists
Choose which currency to use in the shopping lists, you can choose between crowns, pound and euro.

Group settings
In the event that the user belongs to a group within an organization, there are also settings that are specific to that group. You can read more about it here.

Symbolic clock
Select the type of timer to use. The timer is displayed on activities to show the user how much time they have to complete it. It is also possible to hide the timer.

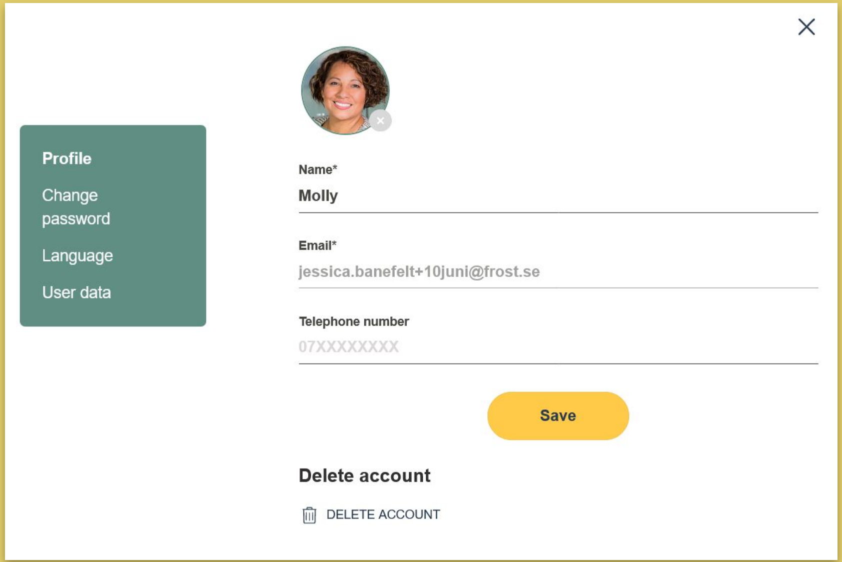


Profile settings

The profile settings are located in the menu at the top right corner. Here you can see the user details of the person who is logged in. From here you can update your profile picture, username and phone number and delete your account. The email address cannot be changed.

Under the "Change password" tab, you can update your password, you need to enter your current and new password. If you have forgotten your password, you can reset it by logging out, going to "Log in" and clicking "Forgot password".

Under the "Language" tab, you can choose which language you want to display the web in.
Languages available today are: Swedish, English, Spanish, German, Italian, Norwegian, Icelandic, Dutch and French.



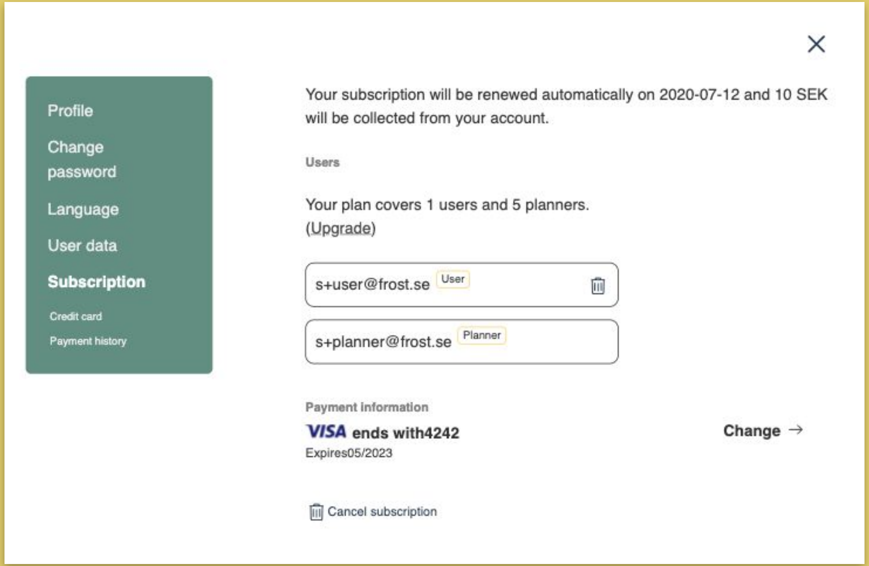
Subscription

If you are paying for Wellbee with a credit card, you will have a tab for your subscription in your profile settings.

Change payment details
Under the subscription tab you find the "Credit card" page. To change which card the payment should be deducted from, click on "Enter payment" and then "Change".

Download receipts
On the "Payment history" page, it is possible to download receipts for all the withdrawals made on the card.

Cancel subscription
Click "Cancel subscription" at the bottom of the page and the account will then be closed after the current payment period.



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