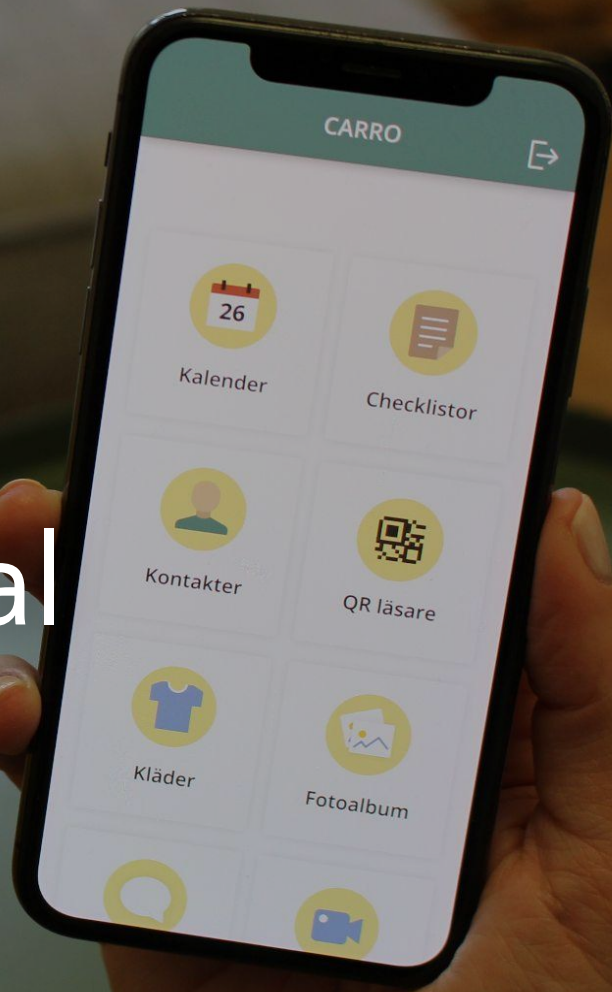




Manual

Version 1.5



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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.

Select license plan

Do you want to buy a license plan with more than 10 user accounts? Contact us at hello@wellbee.app

<p>Family 1 Users, 10 Planners</p> <p>12,00€ /month</p> <p>Choose</p> <p>✓ 30-day free trial ✓ No binding time</p>	<p>Organisation (S) 5 Users, 25 Planners</p> <p>45,00€ /month</p> <p>Choose</p> <p>✓ 30-day free trial ✓ No binding time ✓ Extra functionality for groups*</p>	<p>Organisation (M) 10 Users, 50 Planners</p> <p>80,00€ /month</p> <p>Choose</p> <p>✓ 30-day free trial ✓ No binding time ✓ Extra functionality for groups*</p>
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*With Wellbee School and Organization it is possible to create groups of users. These groups can have a common calendar, daily overview for a residence that can be displayed on an Apple TV, and enable login with Bank ID for users and planners.

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.

Skapa konto

Vald licensplan: Familj [Ändra](#)

10 Planerare 1 Användare
125 kr/mån

Jag ska planera för någon annan
 Jag ska planera för mig själv

För- och efternamn
För och efternamn

Din e-post
exempel@mail.com

Användarens namn
För- och efternamn

Användarens e-post
exempel@mail.com

VISA

VISA / Mastercard
1234 1234 1234 1234

Giltighetsdatum **cvc**
MM/ÅÅ CVC-kod

Betala 125 kr i månaden efter provperioden med start den 2023-11-23

Jag har läst och godkänner [användarvillkoren](#).

Skapa konto

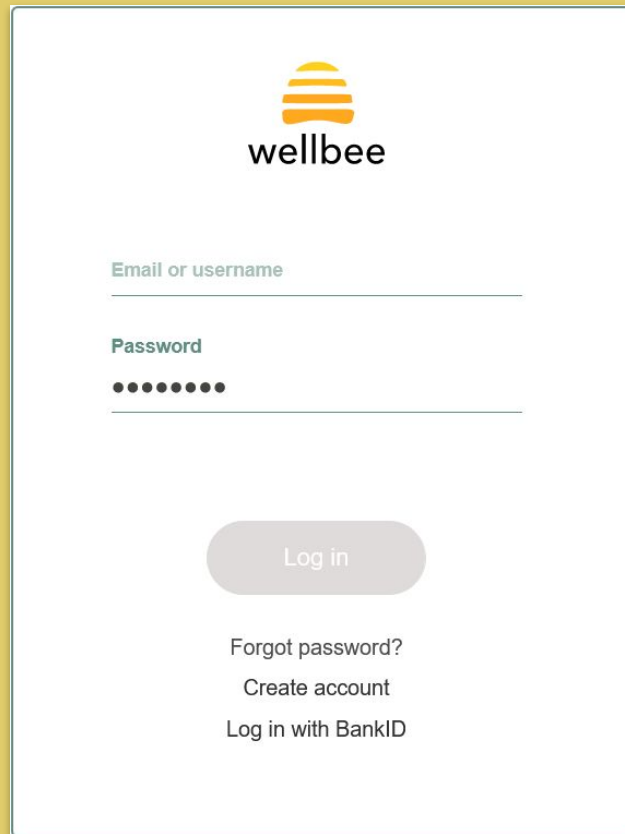
Log in and forgotten password

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

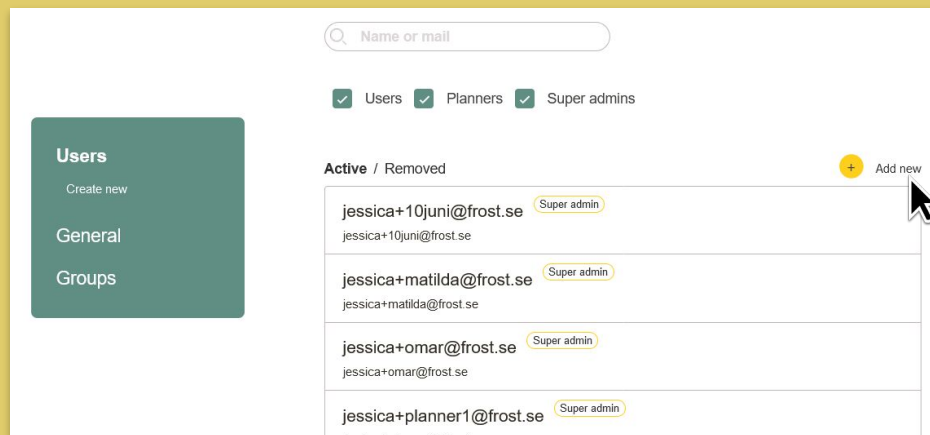
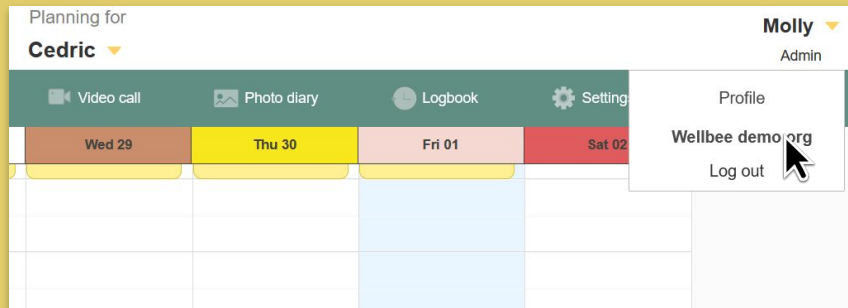


The screenshot shows the Wellbee login interface. At the top center is the Wellbee logo, which consists of a stylized orange and yellow beehive icon above the word "wellbee" in a lowercase, sans-serif font. Below the logo are two input fields. The first is labeled "Email or username" and has a horizontal line underneath it. The second is labeled "Password" and has a horizontal line underneath it with seven black dots representing a masked password. Below the input fields is a rounded rectangular button with the text "Log in". At the bottom of the page, there are three links: "Forgot password?", "Create account", and "Log in with BankID".

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.

Create user
 Create super admin

Users
Create new
General
Groups

Create user

Users can use the app. Planners can use the web.

* required

Username*
Username

Email*
example@mail.com

Password(at least 6 characters) ⓘ
●●●●●●

Telephone number
07XXXXXXXX

Skype id
Enter skype id

Language
Svenska ▼

Add yourself as a planner for this user
 Add example data to the customers account
 Trial ⓘ

Save

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.

We cannot find a user associated with your account

To be able to log in as a planner, you need to be connected to a user. To invite a user, enter their email address and username below. When the user has accepted the invitation, you will be able to log in as usual again.

Username

Username

User's email

example@mail.com

Send invitation

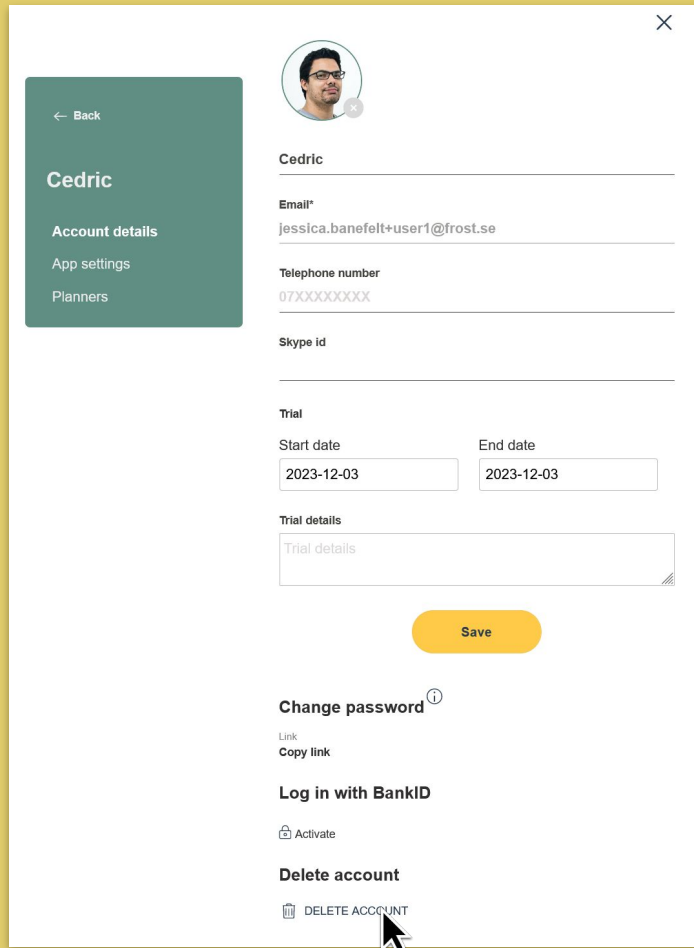
Remove users

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.



← Back

Cedric

Account details

App settings

Planners

Cedric

Email*
jessica.banefelt+user1@frost.se

Telephone number
07XXXXXXXXXX

Skype id

Trial

Start date: 2023-12-03 End date: 2023-12-03

Trial details
Trial details

Save

Change password ⓘ

Link
Copy link

Log in with BankID

Activate

Delete account

DELETE ACCOUNT

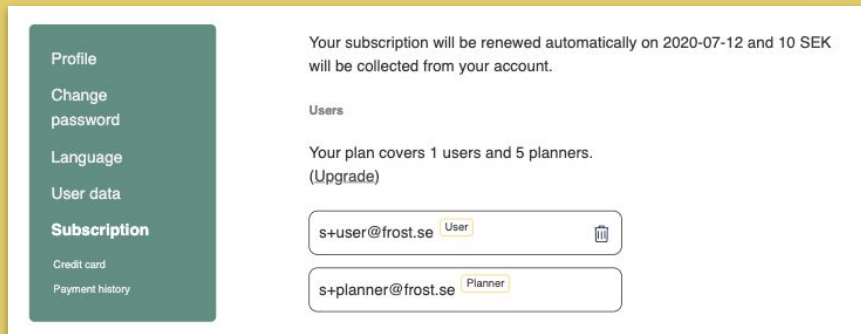
Remove users

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.



The screenshot shows a user management interface. On the left is a dark green sidebar menu with the following items: Profile, Change password, Language, User data, **Subscription**, Credit card, and Payment history. The main content area has a white background. At the top right, it states: "Your subscription will be renewed automatically on 2020-07-12 and 10 SEK will be collected from your account." Below this is a section titled "Users" with the text: "Your plan covers 1 users and 5 planners. (Upgrade)". There are two user entries in a list, each in a rounded rectangular box. The first entry shows the email "s+user@frost.se" followed by a yellow label "User" and a trash can icon. The second entry shows the email "s+planner@frost.se" followed by a yellow label "Planner".

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.

The screenshot shows the 'Add planners' interface in Nova. On the left is a dark green sidebar with a 'Back' arrow, the 'Nova' logo, and menu items for 'Account details', 'App settings', and 'Planners'. The main content area has a white background. At the top, there is a list of users: Frank (jessica.banefelt+planner1@frost.se), Julia Admin (jessica.banefelt+adminplanner1@frost.se), and Molly (jessica.banefelt+10juni@frost.se). Each user entry includes an edit icon, a dropdown arrow, and a close icon. Below the list is an 'Add' section with a title 'Add', an 'Email' field containing 'example@mail.com', and two radio button options: 'Admin' (selected) and 'Planner'. A yellow 'Add' button is at the bottom right. A note at the bottom states: 'Please note that planners can see and adjust the user's data and content.'

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.

The screenshot displays the 'Planners' settings interface. On the left, a dark green sidebar contains navigation options: 'App settings', 'Account details', 'Planners' (highlighted), 'Colour coordination', and 'Clothes according'. The main content area shows a list of planners with their names, roles, and email addresses. Each entry includes edit and delete icons. Below the list is an 'Add' form with an 'Email' input field containing 'example@mail.com'. The role selection is set to 'Admin' (checked) and 'Planner' (unchecked). A yellow 'Add' button is at the bottom. A note at the bottom states: 'Please note that planners can see and adjust the user's data and content.'

Name	Role	Email	Actions
Frank		jessica.banefelt+planner1@frost.se	Edit, Delete
Jessica		jessica.banefelt+planner3@frost.se	Edit, Delete
Julia Admin	Admin	jessica.banefelt+adminplanner1@frost.se	Edit, Delete
Molly	Admin	jessica.banefelt+10juni@frost.se	Edit, Delete
Väntande		jessica.banefelt+dummy@frost.se	Delete

Add

Email
example@mail.com

Admin
 Planner

Add

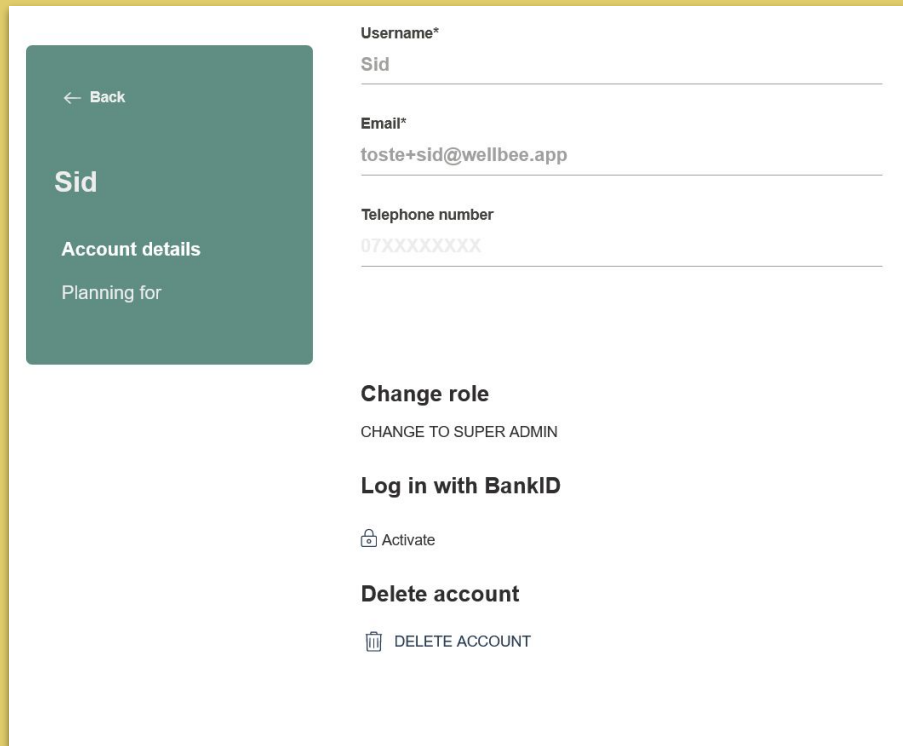
Please note that planners can see and adjust the user's data and content.

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.



The screenshot shows a user profile page for 'Sid'. On the left is a dark teal sidebar with a back arrow, the name 'Sid', and the text 'Account details' and 'Planning for'. The main content area is white and contains the following fields and options:

- Username***: Sid
- Email***: toste+sid@wellbee.app
- Telephone number**: 07XXXXXXXX
- Change role**: CHANGE TO SUPER ADMIN
- Log in with BankID**:  Activate
- Delete account**:  DELETE ACCOUNT

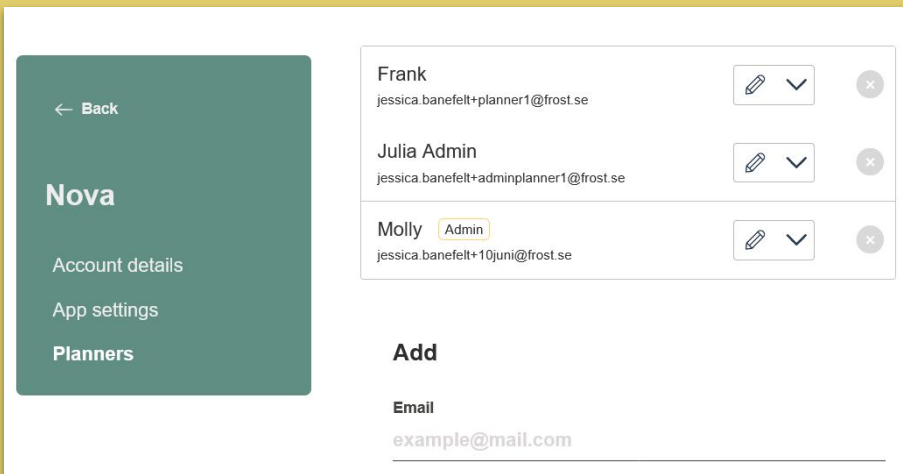
As super admin (from user)

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

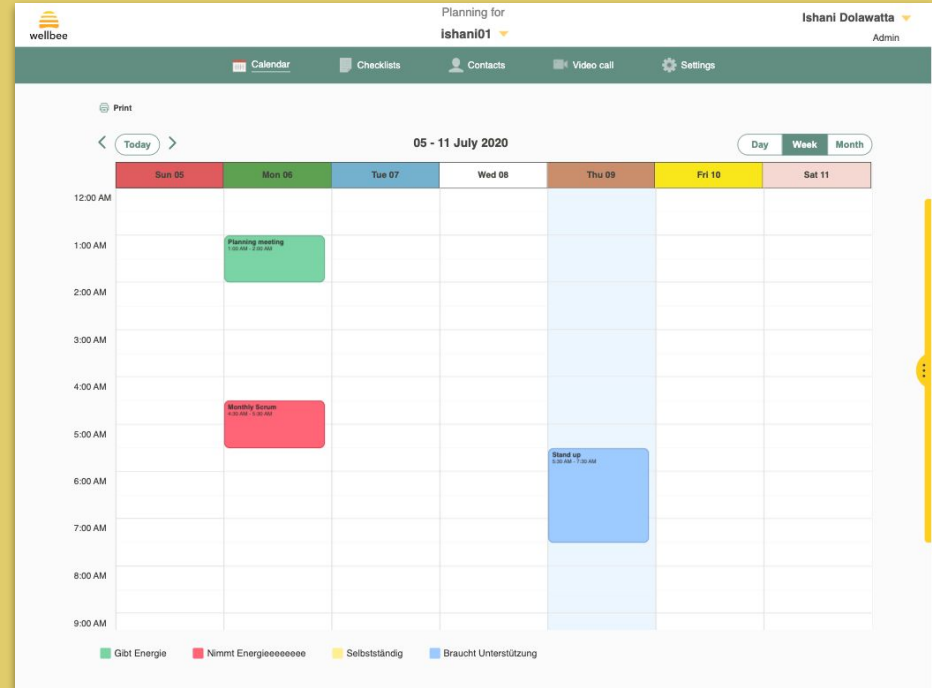
The calendar shows the planning for a week by default but it is also possible to show one day at a time or an overview of an entire month.

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.

The screenshot shows the 'Create activity' form in the Wellbee app. The app is running on a mobile device, and the user is logged in as 'Cedric'. The form is titled 'Create activity' and has a '+ Use template' link. The form fields are:

- Title***: A required text field with the placeholder 'Activity title'.
- Date**: A date field set to '11/29/2023'.
- From**: A time field set to '11:30'.
- To**: A time field set to '12:30'.
- Reminder**: A section with a checked option 'At the start of activity' and other options: '10 min', '30 min', '1 h', '1 day', and 'Alarm reminder'.
- Repeat**: A dropdown menu set to 'Never'.
- Colour coordination**: A dropdown menu set to 'Select colour'.
- Description**: A text area with the placeholder 'Description'.
- Checklist**: A dropdown menu set to 'Select checklist'.
- Reward**: A section with a '+ Add' link.
- Links**: A section with a '+ Add' link.
- Set activity as private**: A checkbox with a help icon.
- Save as template**: A checkbox.

At the bottom of the form, there are two buttons: 'Cancel' and 'Save'.

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.

The screenshot shows the 'Create activity' form in the Cedric app. The app's header includes 'Planning for Cedric' and navigation icons for Calendar, Checklists, Address book, Video call, Photo diary, Logbook, and Settings. The form is titled 'Create activity' and includes a '+ Use template' link. The fields are as follows:

- Title***: A text input field with the placeholder 'Activity title' and a red 'Required field' label below it.
- Date**: A date input field showing '11/29/2023'.
- From**: A time input field showing '11:30'.
- To**: A time input field showing '12:30'.
- Reminder**: A section with a checked option 'At the start of activity' and unchecked options for '10 min', '30 min', '1 h', '1 day', and 'Alarm reminder'.
- Description**: A large text area with the placeholder 'Description'.
- Checklist**: A dropdown menu with the option 'Select checklist'.
- Repeat**: A dropdown menu with the option 'Never'.
- Colour coordination**: A dropdown menu with the option 'Select colour'.
- Reward**: A section with a '+ Add' link.
- Links**: A section with a '+ Add' link.
- Privacy and Template Options**: Two checkboxes at the bottom right: 'Set activity as private' (with a help icon) and 'Save as template'.

At the bottom of the form are two buttons: 'Cancel' (grey) and 'Save' (yellow).

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.

Planning for
Cedric

Molly Admin

Video call Photo diary Logbook Settings

Shared templates

September 2023

Day Week Month

29 Thu 30 Fri 01 Sat 02

Lunch 12:00 PM - 1:00 PM

Lunch 12:00 PM - 1:00 PM

Lunch 12:00 PM - 1:00 PM

Football 2:00 PM - 3:00 PM

Grocery shopping 4:00 PM - 4:30 PM

Clean 5:00 PM - 8:30 PM

Midday 6:00 PM - 7:00 PM

Midday 6:00 PM - 7:00 PM

Midday 6:00 PM - 7:00 PM

Last used / A - Z

Search

Meeting with Anne

Grocery shopping

Football

Morning routine
Good morning Cedric! The checklist will help you get ready for the day.

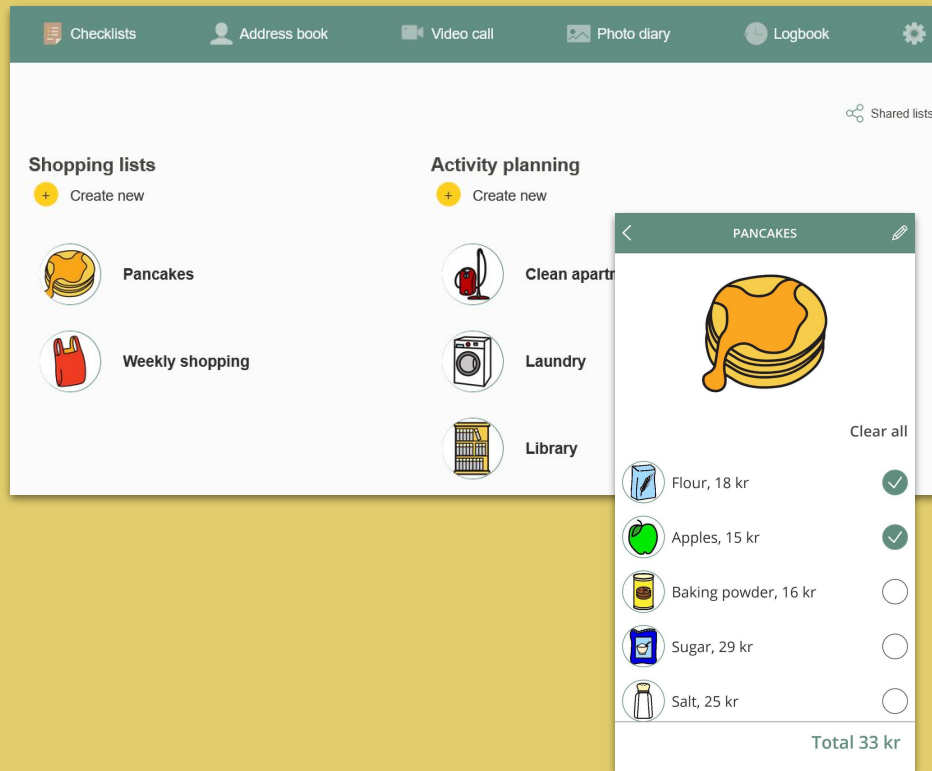
Checklists

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](#).

Create shopping list

Title*
E.g. Shop for tacos

Products

		Bread	45 kr
		Apples	15 kr
		Item	0 kr

+
Total price 60 kr

Share list

Save

Last used / A - Z

- Apples 15 kr
- Baking powder 16 kr
- Bread 45 kr
- Butter 52 kr
- Cereal 38 kr
- Eggs 28 kr
- Flour 18 kr
- Juice 0 kr

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.

Edit contact 🗑️ Delete contact

Name*
Annie

Email
annie@mail.se

Telephone number
07XXXXXXXX

Make it possible for the user to call

Make it possible for the user to send text messages

Skype id
Skype id

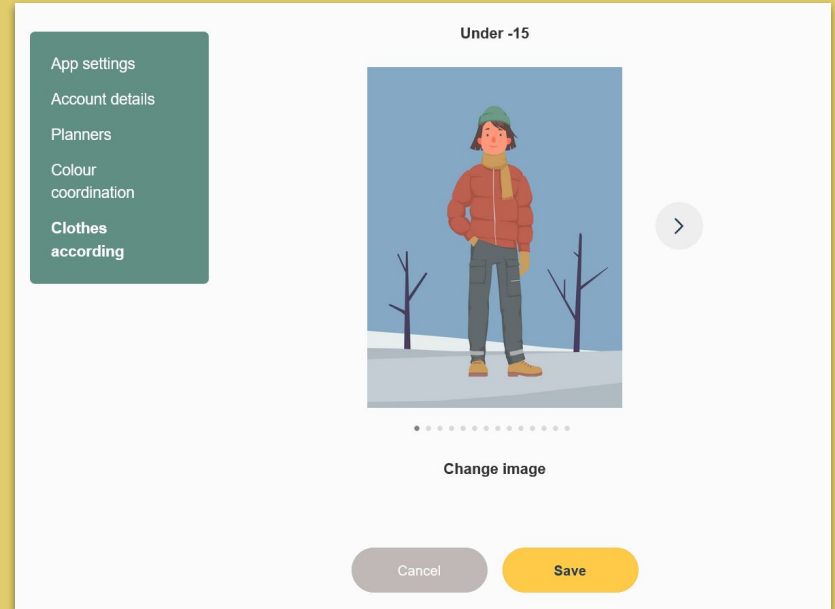
Cancel Save

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

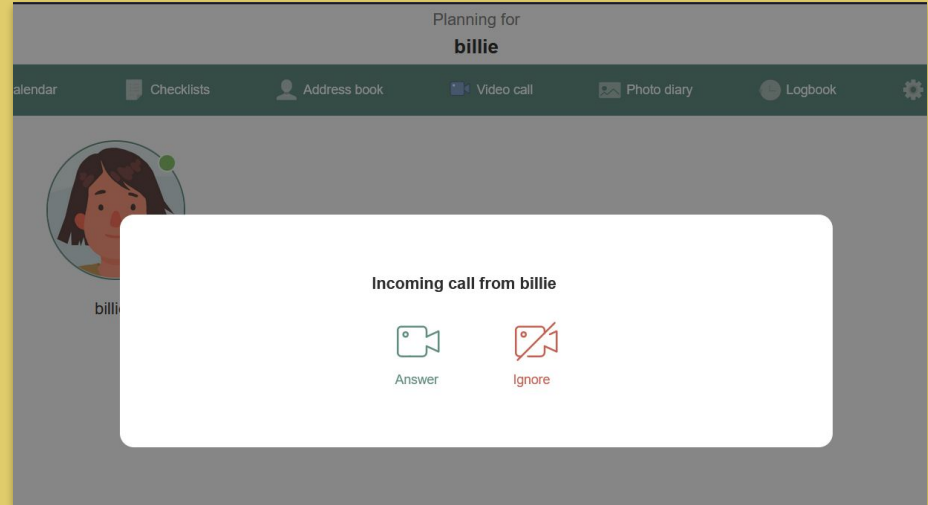
To use the Video call function it must be switched on under Settings → App settings → App functions.

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.

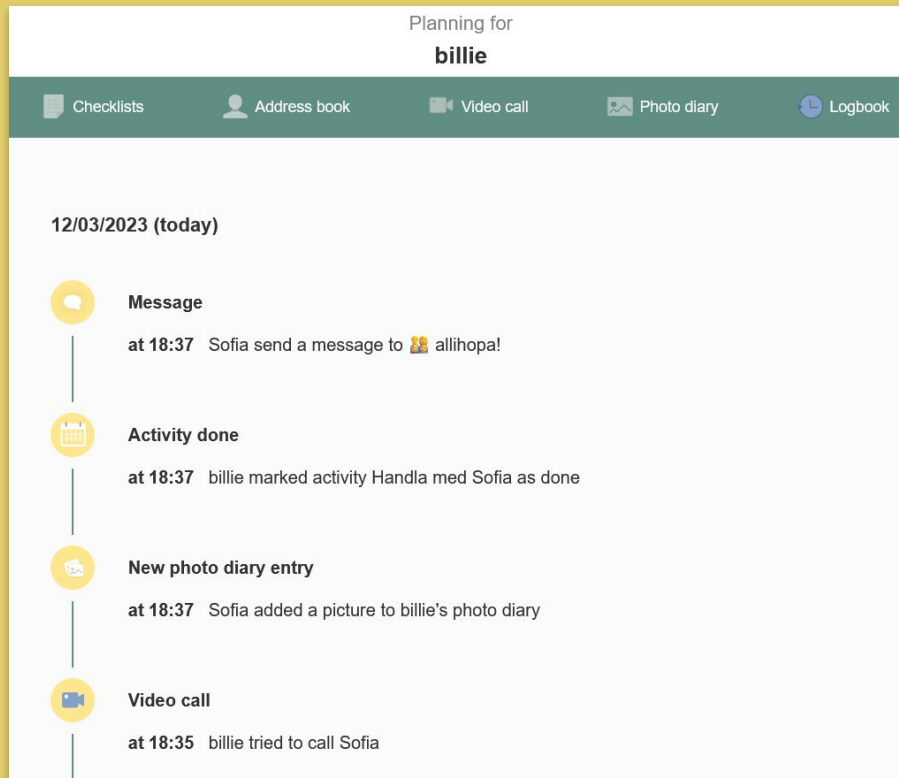


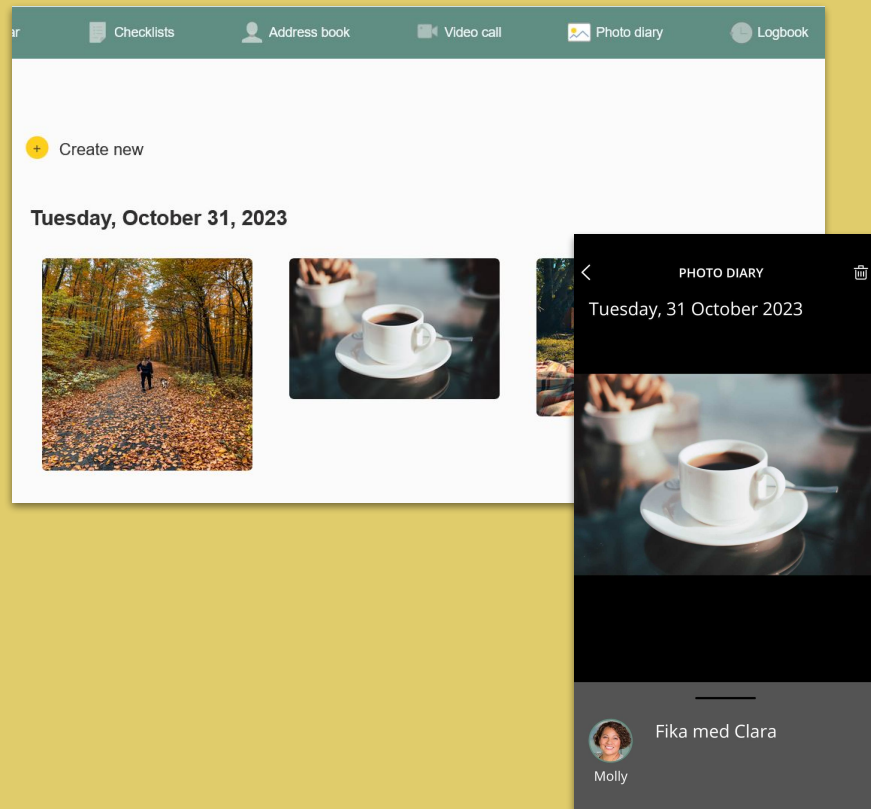
Photo diary

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.

The screenshot displays a planning application interface. At the top, it says "Planning for Nova" with a dropdown arrow. The user "Molly Admin" is logged in. A navigation bar includes "Video call", "Photo diary", "Logbook", and "Settings". Below this is a "Shared templates" section. The main area is a calendar for "December - 02 December 2023", with tabs for "Day", "Week", and "Month". The calendar shows "Wed 29" and "Thu 30". A "Messages" overlay is open on the right, listing recent messages from CedricNova, Julia AdminCedric, Cedric, and Nova. At the bottom right, there is a floating button with a speech bubble icon and a notification badge.

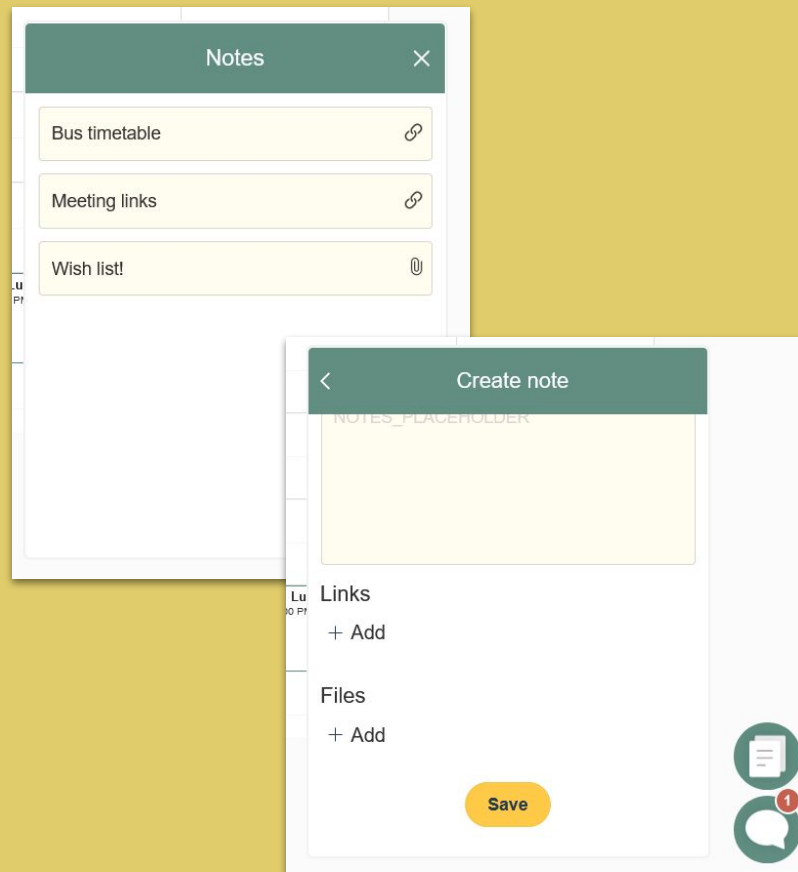
Notes

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

The screenshot displays the 'App settings' menu on the left, with 'App settings' selected. The main area is divided into two sections:

- App functions:** A list of 11 features with toggle switches. All are turned on except for 'Hide log out button', which is turned off.
 - Calendar
 - Checklists
 - Address book
 - QR reader
 - Clothes according to weather
 - Video call beta
 - Photo diary
 - Logbook
 - Messages beta
 - Notes beta
 - Personal overview
 - Hide log out button
- Calendar:** A sub-section with an information icon and three toggle switches, all of which are turned on.
 - Plan in app
 - Use week colours
 - colour coordination

At the bottom of the 'Calendar' section, there is a 'Manage colour' link. To the right of the settings lists are two smartphone mockups showing the app's interface: the top one shows a home screen with icons for Calendar, Checklists, Address book, and QR; the bottom one shows a calendar view with color-coded days and activities.

Lists

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

Currency for shopping lists

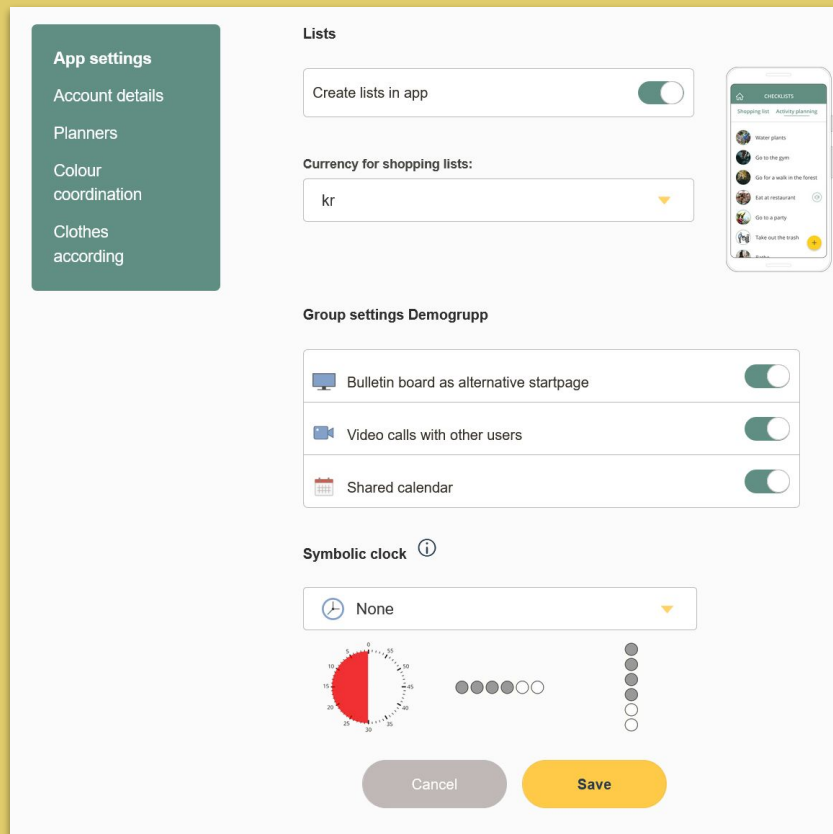
Choose which currency to use in the shopping lists, you can choose between crowns, pound and euro.

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.

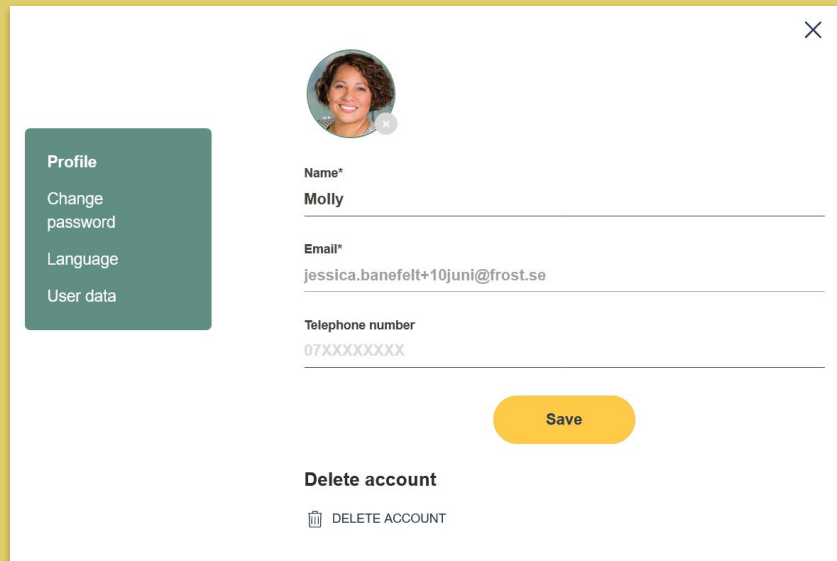


Profile settings

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.



The screenshot shows a mobile application interface for profile settings. On the left is a dark green sidebar menu with the following options: Profile, Change password, Language, and User data. The main content area on the right features a circular profile picture of a woman with curly hair. Below the picture, the 'Name' field is labeled 'Molly'. The 'Email' field contains 'jessica.banefelt+10juni@frost.se'. The 'Telephone number' field contains '07XXXXXXXX'. A yellow 'Save' button is positioned below the telephone number field. At the bottom, there is a 'Delete account' section with a trash can icon and the text 'DELETE ACCOUNT'. A close button (X) is located in the top right corner of the settings panel.

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

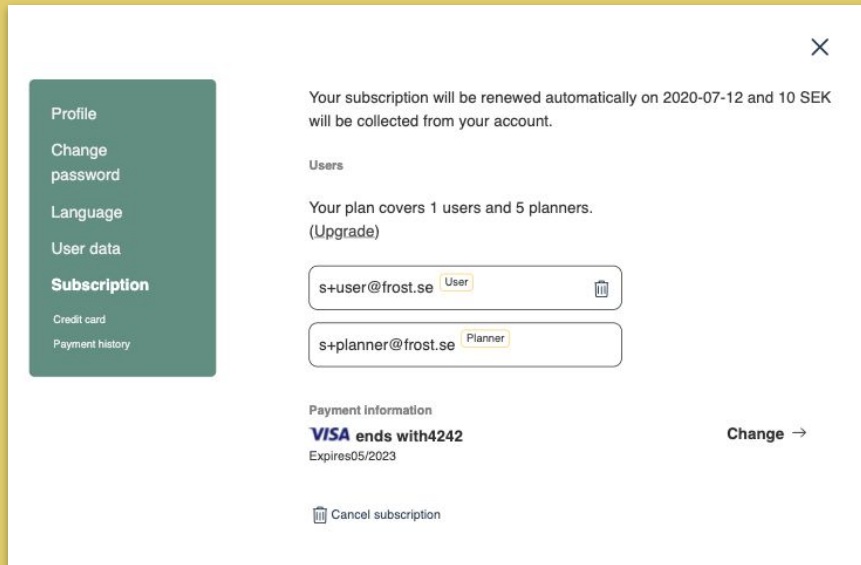
Under the subscription tab you find the "Credit card" page. To change which card the payment should be deducted from, click on "Enter payment" and then "Change".

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.



Website:

<https://www.wellbee.app/>

Support:

support@wellbee.app

Other queries & contact:

hello@wellbee.app