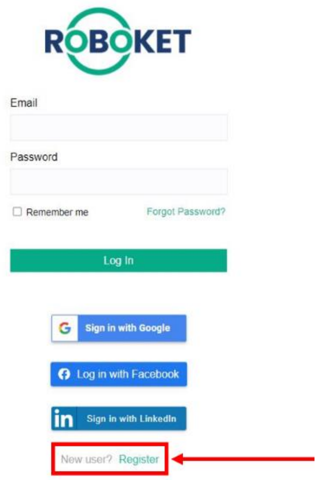
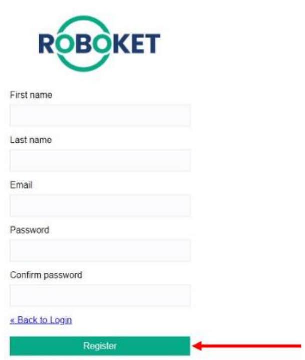
Sign Up

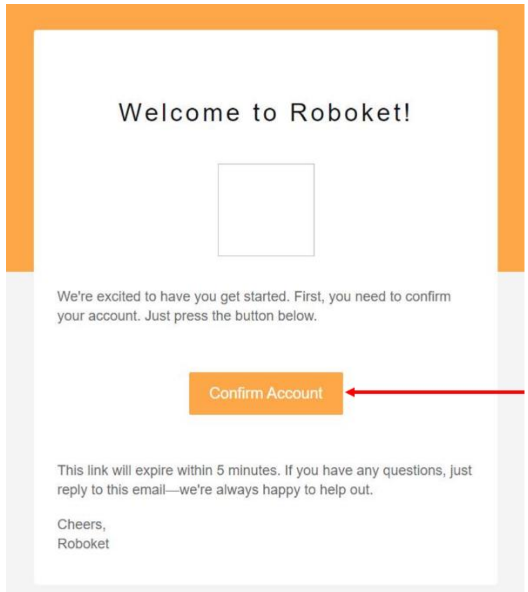
1. Go to Roboket website (https://apps.roboket.com/crm/). There you will find the "homepage" where you can see multiple options to login and register. You will need to create an account to login.
2. To create an account, press the button named "Register" from the last line of the page.



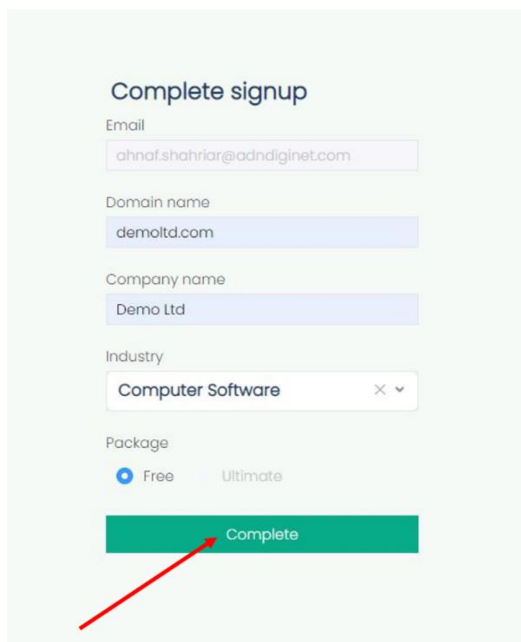
3. In this page, you must fill up all the fields properly. Do not forget to provide the same password in both "Password" and "Confirm Password" fields. Then press the "Register" button.



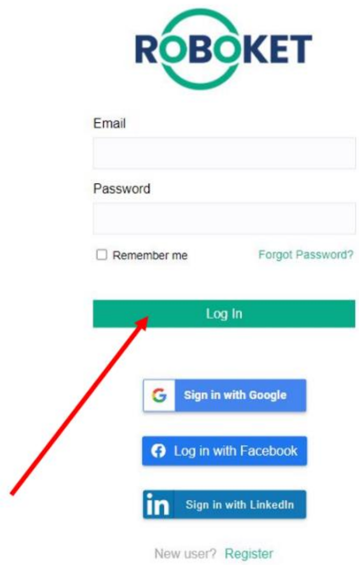
4. After a few seconds you will receive an email on the email address you have provided while signing up where you will have to press the button named "Confirm Account".



5. Fill up all the fields with proper information except “Email” and “Package” which will be selected “Free” by default and then press “Complete”. You will be moved to the “homepage” page.

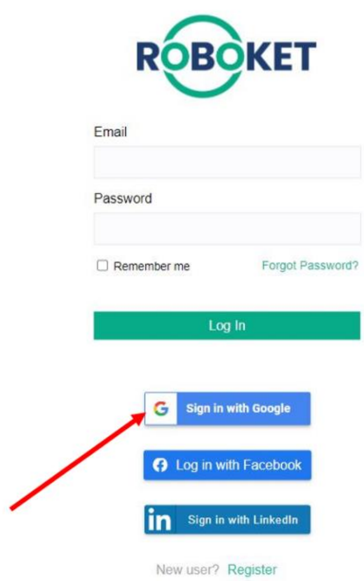


6. <u>Login:</u> You need to visit the homepage of Roboket website where you have to provide your email id and password and press the “Log In” button.



Sign In with Google

1. In the “homepage” of Roboket website, you will find a button named “Sign in with Google” and click on it.

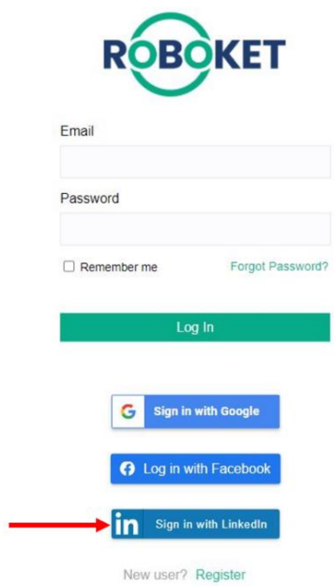


2. If you are already signed into your email account then go forward. Otherwise sign in providing your email address and password.
3. Now follow the step 4, 5 from the “Sign Up” segment.

4. Login: You need to visit the homepage of Roboket website and press the button named "Sign in with Google" to login (same button from step 1).

Sign In with LinkedIn

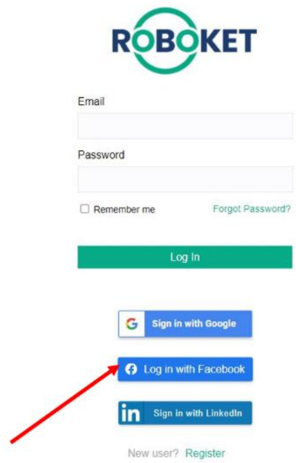
1. In the "homepage" of Roboket website, you will find a button named "Sign in with LinkedIn" and click on it.



2. If you are already signed into your LinkedIn account then go forward. Otherwise sign in providing your email address and password and you will be logged into your account.
3. Login: You need to visit the homepage of Roboket website and press the button named "Sign in with LinkedIn" to login (same button from step 1).

Log In with Facebook

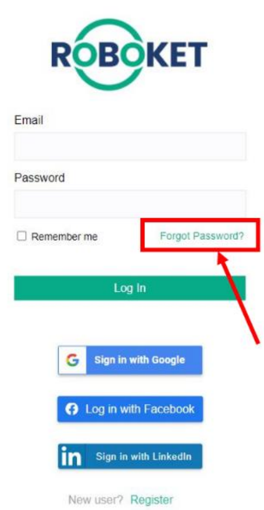
1. In the "homepage" of Roboket website, you will find a button named "Log in with Facebook" and click on it.



2. If you are already signed into your Facebook account then go forward. Otherwise log in providing your email address and password.
3. Now follow the steps 4, 5 from the “Sign Up” segment.
4. Login: You need to visit the homepage of Roboket website and press the button named “Log in with Facebook” to login.

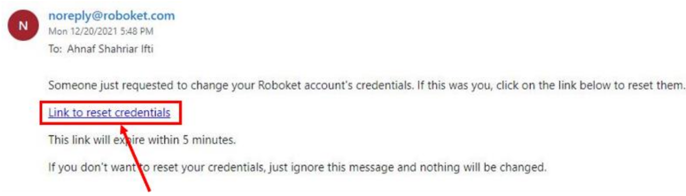
Forgot Password Reset

1. If you have forgotten your password, then go to the “homepage” of Roboket website, click on a button named “Forgot Password” which will be available just under the “Password” field.



2. In this page, you have to provide the email address of your account and press “Submit”.

3. After a few seconds you will receive an email on the email address you have provided in step 2 where you will have to press the button/link named “Link to reset credentials”.

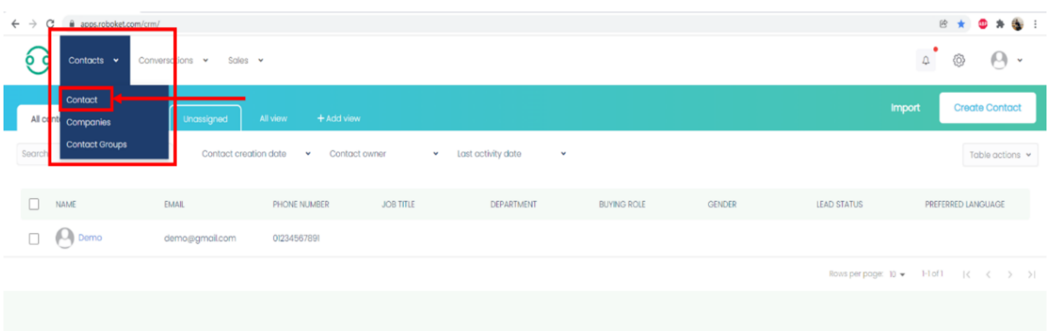


4. Provide a new password and press “Submit”. Do not forget to provide the same password in both fields. Then you will be directly moved to the dashboard.

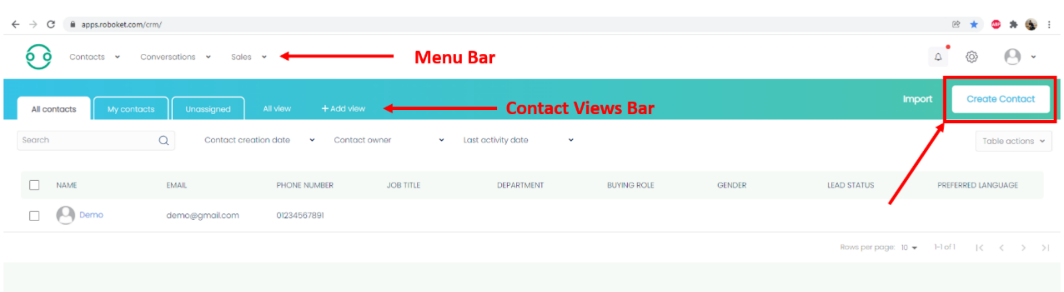
CRM

1. Create Manual Contact

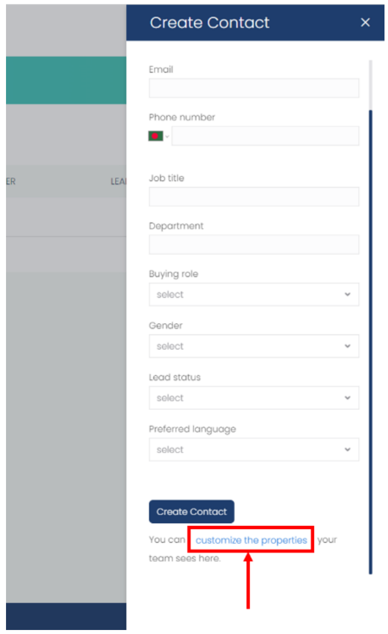
a. After logging in you will get the dashboard. At the top of the page, there is a “Main Menu Bar” where you will get a button named “Contacts”. After clicking it, a dropdown menu will appear and select “Contact” from that. You will be directed to the “Contact” page containing an information list of the contacts.



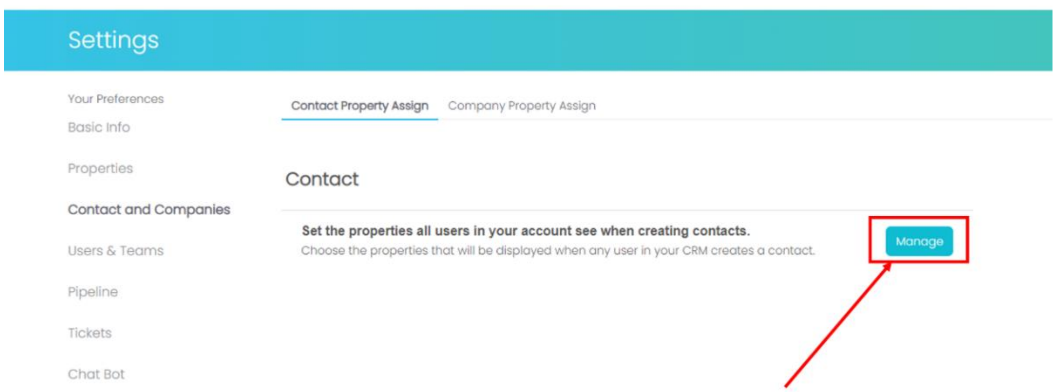
b. In the right corner of the page, there is a button named “Create Contact” and click on it. A new popup menu will appear on the right side of the window.



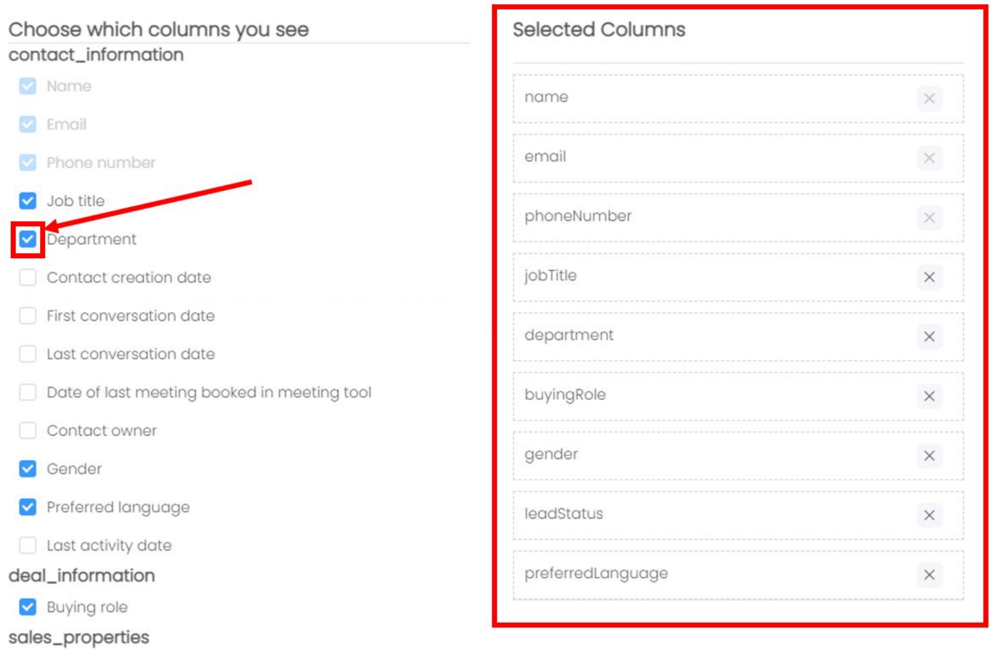
c. Scroll down and select “customize the properties”. You will be redirected to the “Contact and Companies” option of the “Settings” page.



d. Select “Manage”.



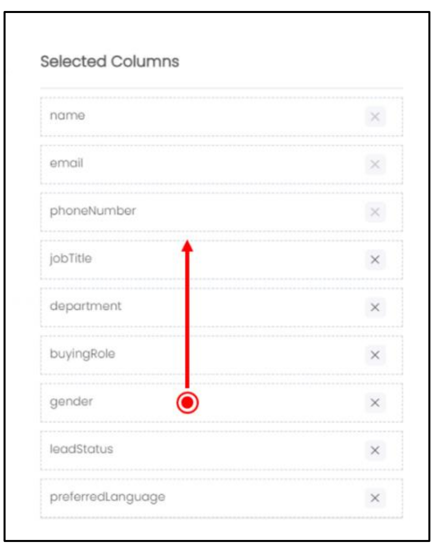
e. From this popup you can choose options by clicking on the box on the left side of the options. They will be marked as checked.

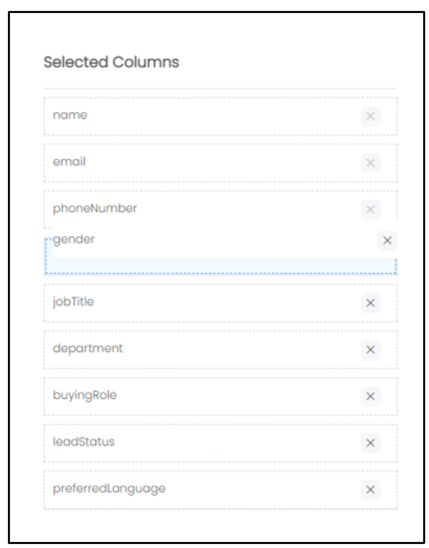


f. Your marked items will be displayed on the right side titled "Selected Columns". These selected items will be shown as fields in this order on the "Create Contact" page and you can insert information only in these fields while adding new contacts.

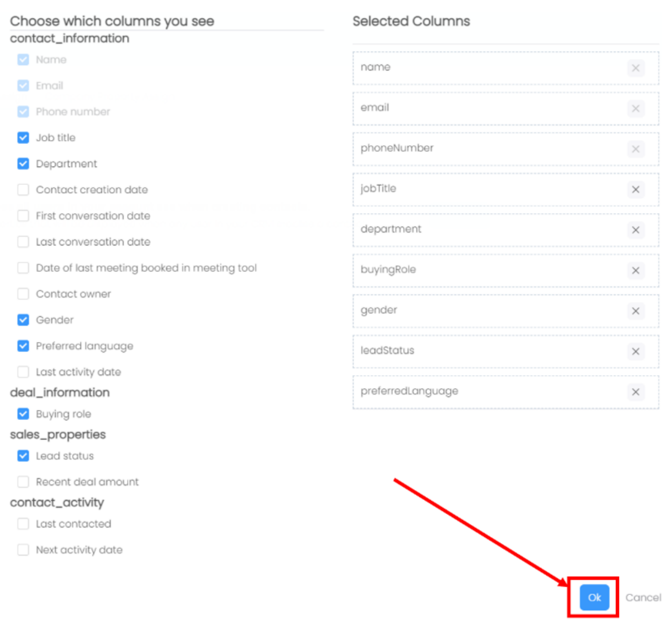
g. To deselect any item, click the cross button from the right side of the items from the "Selected Columns" list or, mark the items uncheck by clicking on the box beside the items from the left part of the page.

h. To reorder click and hold an item and drag it up/down.

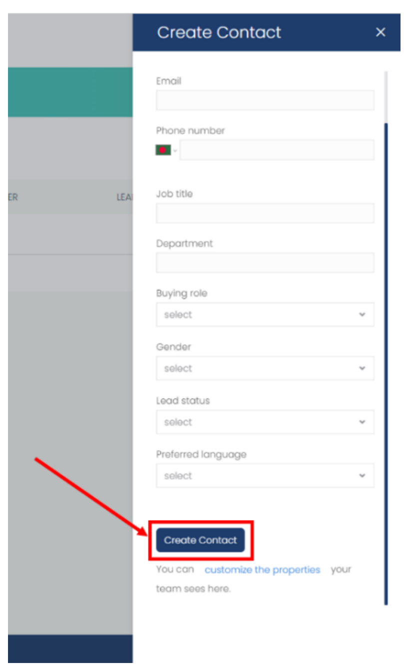




i. After all the settings are complete, click on the “Ok” button located at the bottom right corner of the popup.

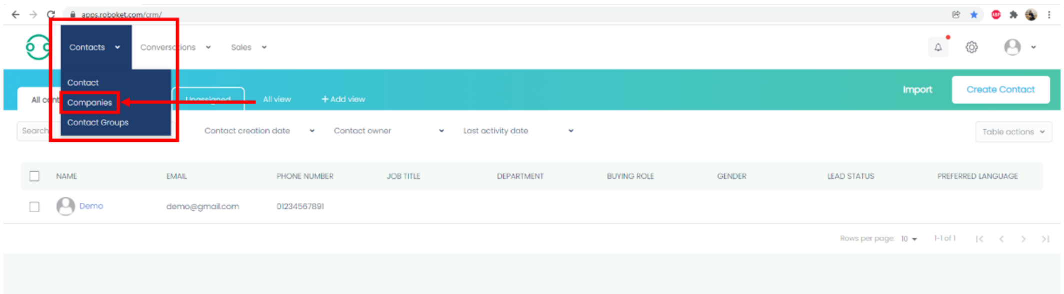


j. Follow steps a, b and go to the “Create Contact” option. Fill up all the fields and click on the “Create Contact” button. Your newly created contact information will be visible in the “Contact” page.

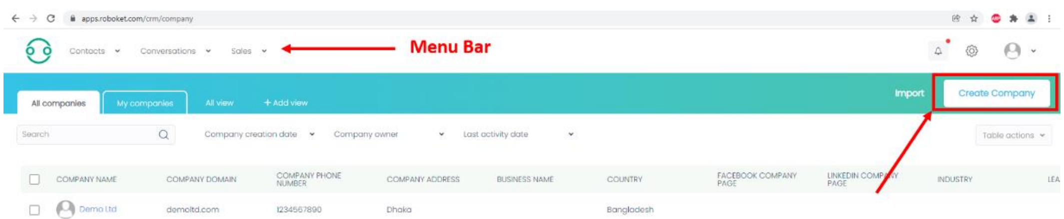


2. Create Manual Company

a. After logging in you will get the dashboard. At the top of the page, there is a "Main Menu Bar" at the top of the page where you will get a button named "Contacts". After clicking it, a dropdown will appear and select "Companies" from that. You will be directed to the "Company" page containing an information list of the companies.



b. In the right corner of the page there is a button named "Create Company" and click on it. A new popup will appear on the right side of the window.

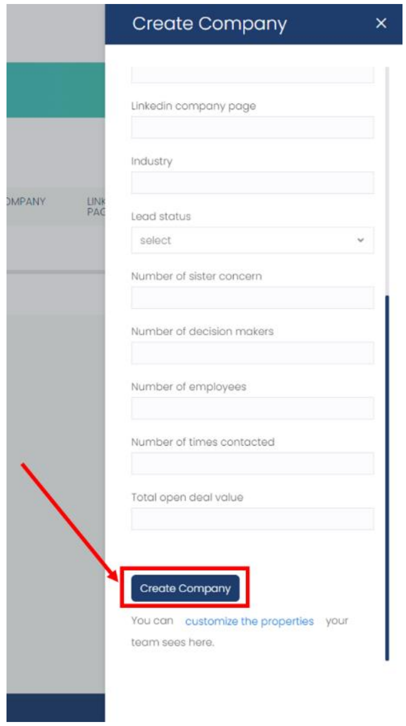


c. Follow steps c, d, e from the "Create Manual Contact" segment.

d. Your marked items will be displayed on the right side titled "Selected Columns". These selected items will be shown in this order on the "Create Company" page and you can insert information only in these fields while creating a new entry of company information.

e. Follow steps g, h from the "Create Manual Contact" segment.

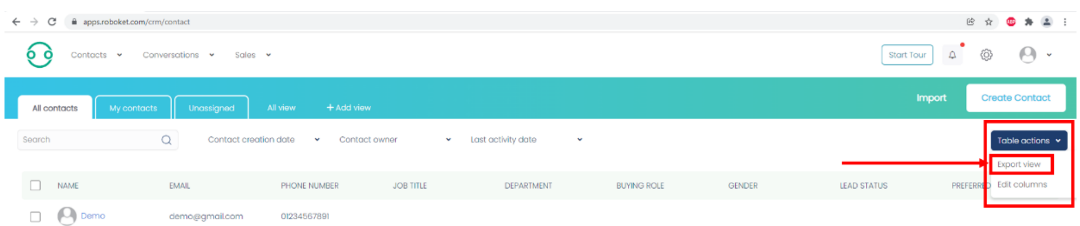
f. Follow steps a, b and go to the "Create Company" option. Fill up all the fields and click on the "Create Company" button. Your newly created information will be visible in the "Company" page.



3. Export Contacts

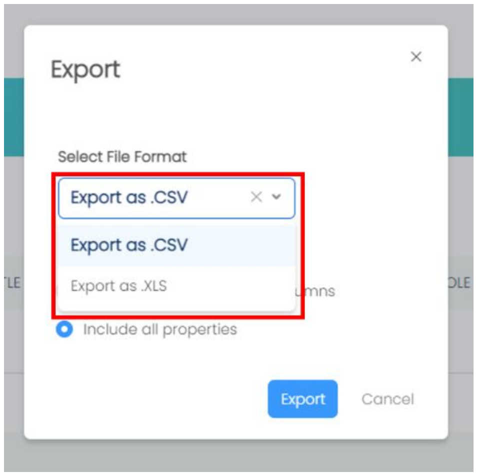
a. Dashboard > Contacts > Contact.

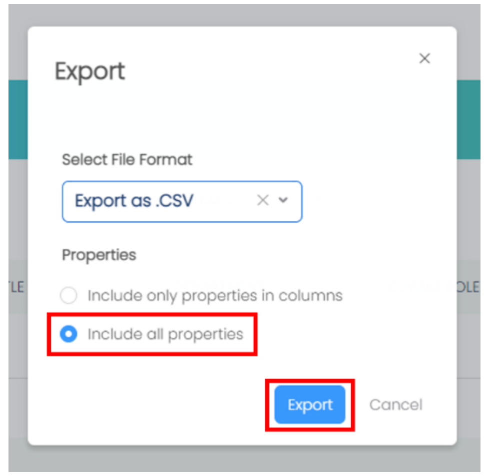
b. In the right corner, there is a button named "Table actions".



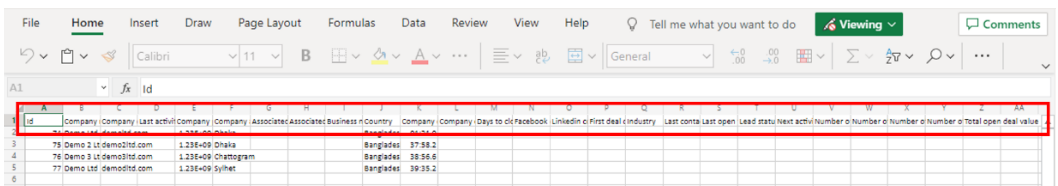
c. After clicking it, a dropdown menu will appear. Select "Export view" from that. A new popup will appear.

d. Select any of the file format (.XLS or .CSV) options from "Select File Format" by clicking on the textbox. Click "Include all properties" from the "Properties". Then click the "Export" button.

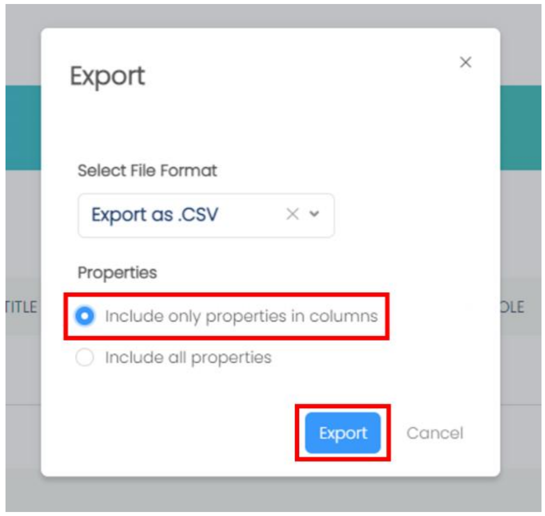


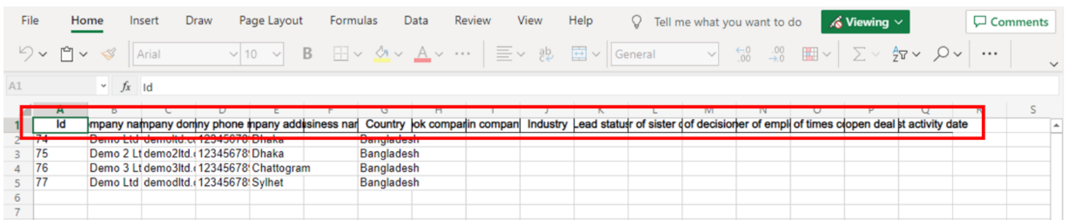


e. After a few seconds, you will receive a new mail on your email id associated with your account which will contain a file where information of all the properties of the table of the contacts will be included.

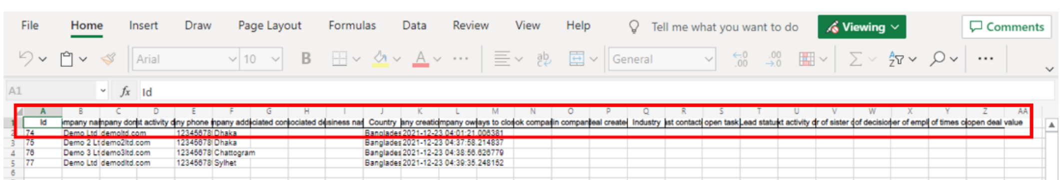


f. In step d, you can also click on “Include only properties in columns” after selecting any of the file format (.XLS or .CSV) options from “Select File Format”. In this way, you will receive a mail on your email id associated with your account which will contain a file where information of the visible properties in the dashboard of the contacts will be included.

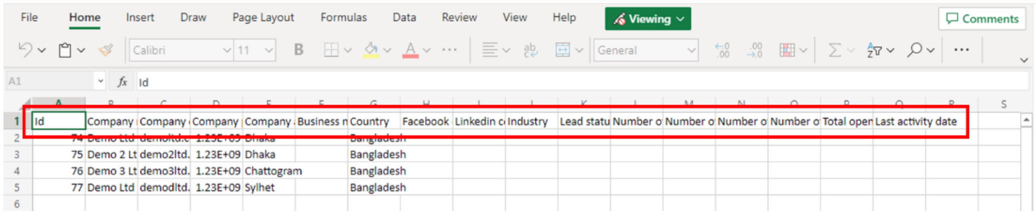




4. **Export Companies**
   a. Dashboard > Contacts > Companies.
   b. Follow steps b, c, d from the “Export Contacts” segment.
   c. After a few seconds, you will receive a new mail on your email id associated with your account which will contain a file where information of all the properties of the table of the companies will be included.



   d. In step d, you can also click on “Include only properties in columns” after selecting any of the file format (.XLS or .CSV) options from “Select File Format”. In this way, you will receive a mail on your email id associated with your account which will contain a file where information of the visible properties in the dashboard of the companies will be included.



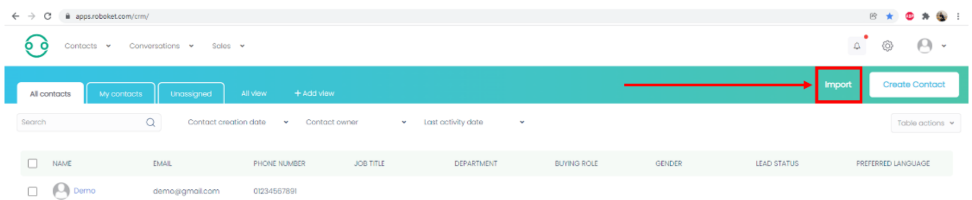
5. Import Contacts

I. From File:

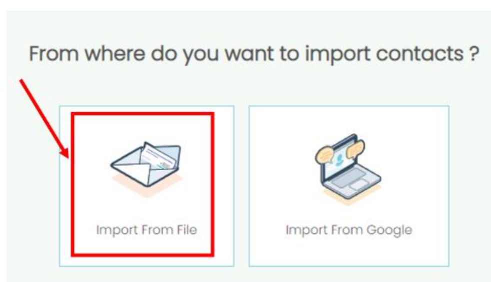
You can import contact information by uploading files.

a. Dashboard > Contacts > Contact.

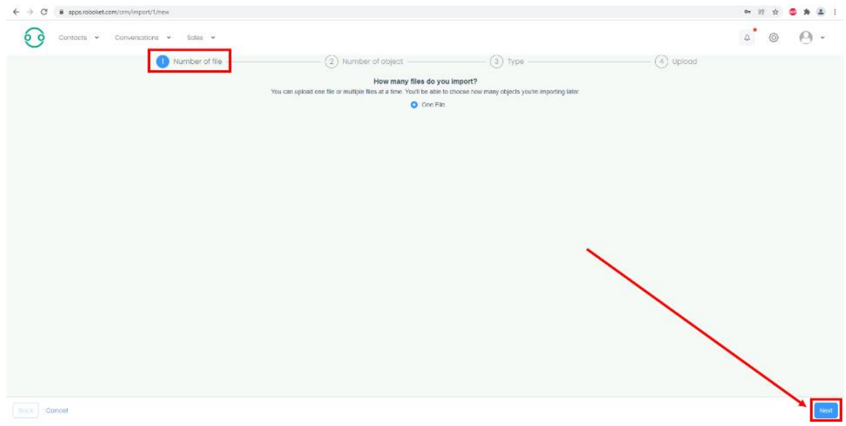
b. In the top right corner, there is a button named “Import”. Click on it.

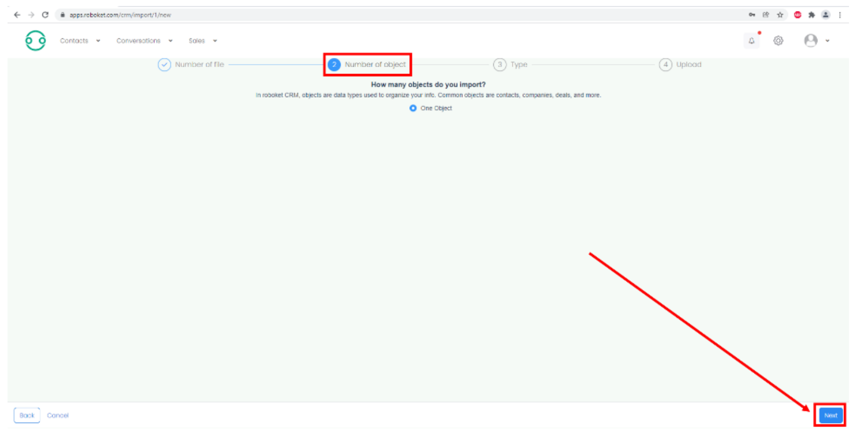


c. Click on the “Import From File” button.

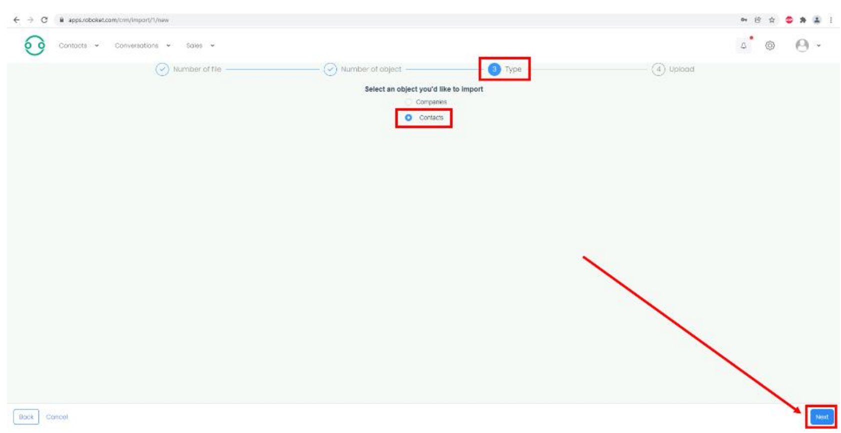


d. Click on the “Next” button which will be available in the bottom right corner from both the “1. Number of files” and “2. Number of Objects” options.

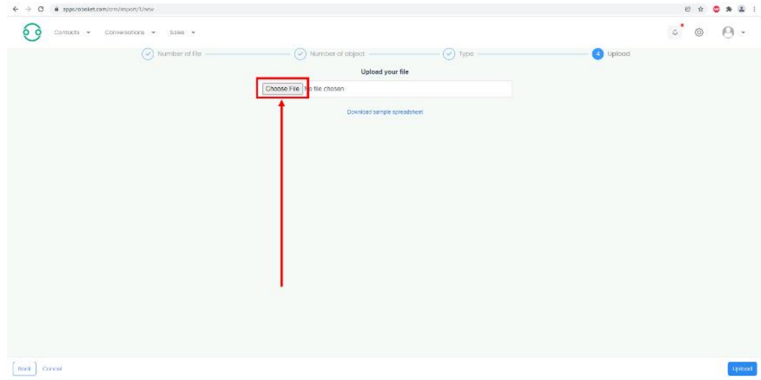


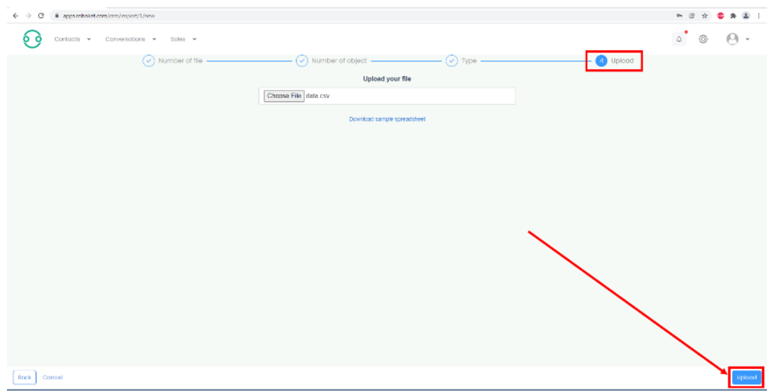


e. Select “Contacts” from “3. Type” options and click “Next”.



f. In “4. Upload” option, click the “Choose File” button and select file. The file must be in either .xls or .csv format. Then click upload. After a few moments, your uploaded contact information will be visible in the “Contact” page.



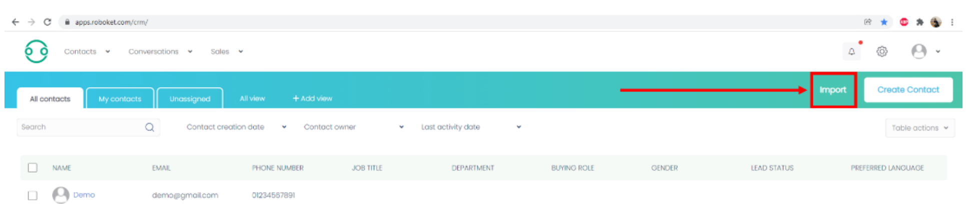


II. From Google:

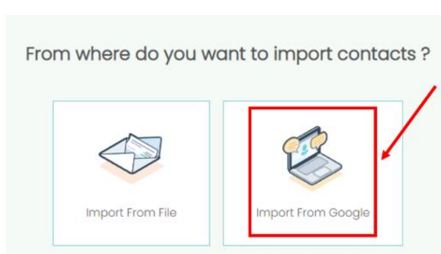
You can import contact information from google by connecting with it.

a. Dashboard > Contacts > Contact.

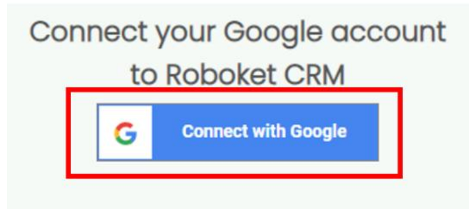
b. In the top right corner, there is a button named “Import”.



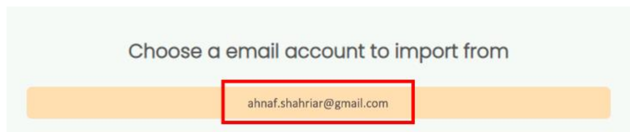
c. Click on “Import From Google”.



d. Click on “Connect with Google”. Now you have to sign in and choose your google account. Before that, you must have contact information in the “Google Contact” of that google account.

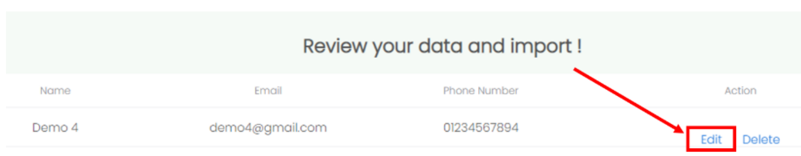


e. Select your connected account from “Choose an email account to import from” by clicking on your email id.

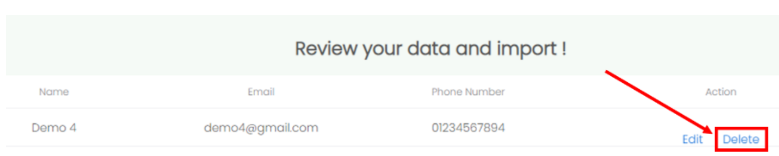


f. You will get a page, “Review your data and import!” where you can get a chance to review all your contact information. Make sure that all of the fields (“Name”, “Email” and “Phone Number”) in this page are filled up for all the contacts.

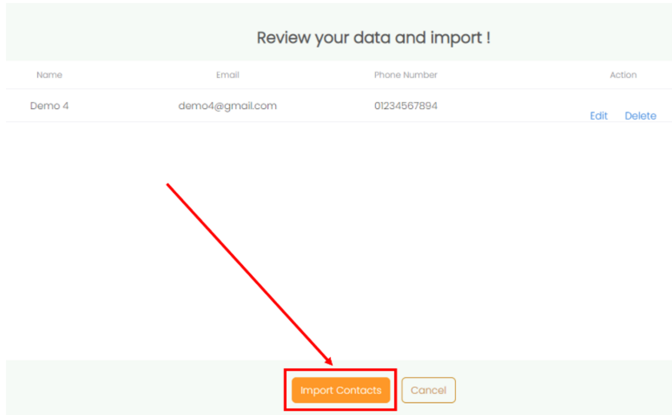
g. You can edit, add the fields (“Name”, “Email” and “Phone Number”) by clicking on the “Edit” option in the “Action” column.



h. You can also delete contact from “Review your data and import!” page by clicking on the “Delete” option in the “Action” column.



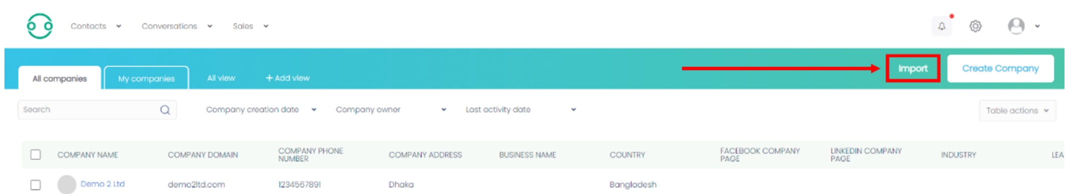
i. After reviewing contact information, you can upload them by clicking on the “Import Contact” button. After a few moments, your uploaded contacts will be visible in the “Contact” page.



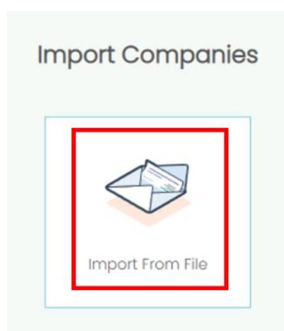
6. Import Companies

a. Dashboard > Contacts > Companies

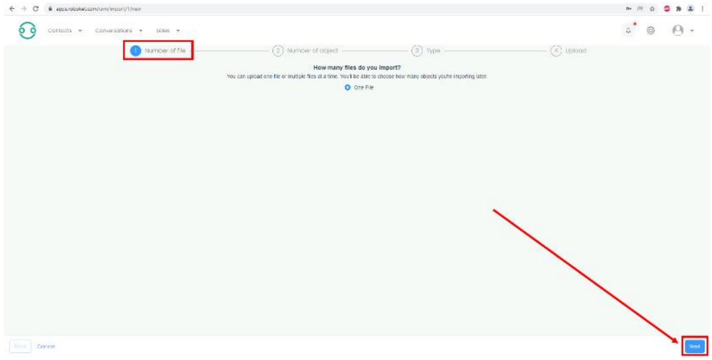
b. In the top right corner, there is a button named “Import”. Click on it.

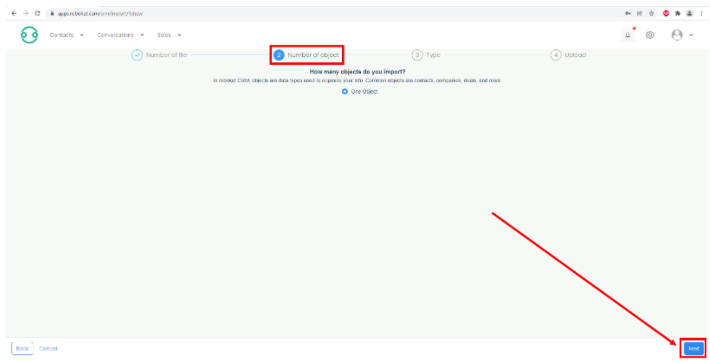


c. Click on the “Import From File” button.

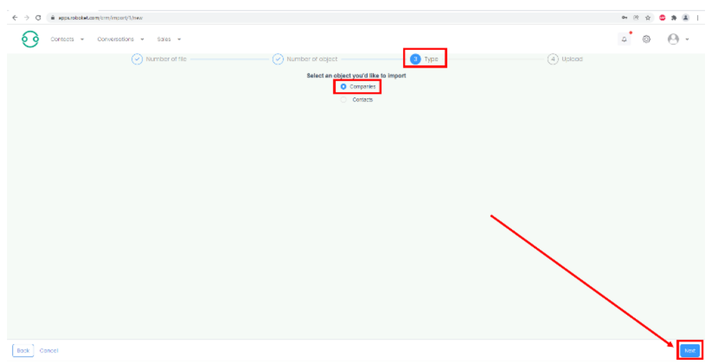


d. Click on the “Next” button which will be available in the bottom right corner from both the “1. Number of files” and “2. Number of Objects” options.

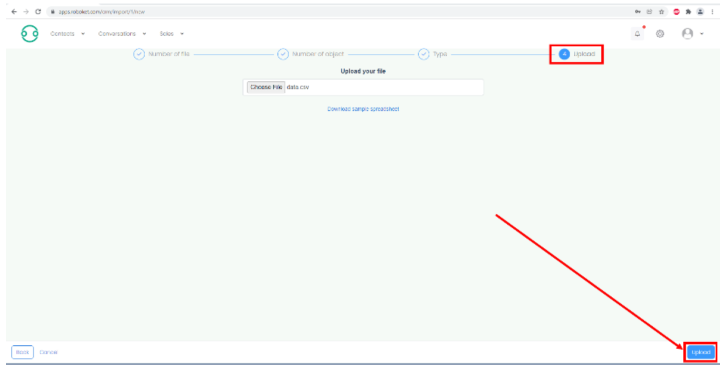




e. Select “Companies” from “3. Type” options and click “Next”.



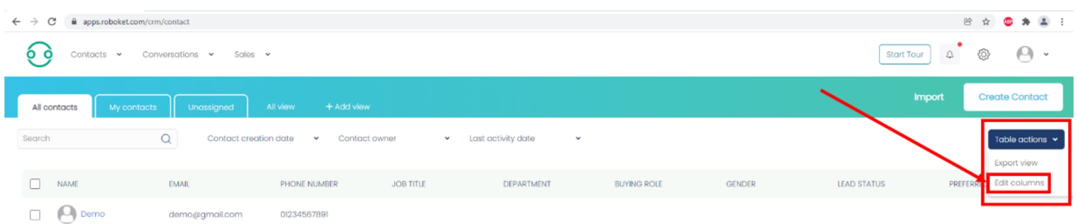
f. In “4. Upload” option, click the “Choose File” button and select file. The file must be in either .xls or .csv format. Then click upload. After a few moments, your uploaded company information will be visible in the “Companies” page.



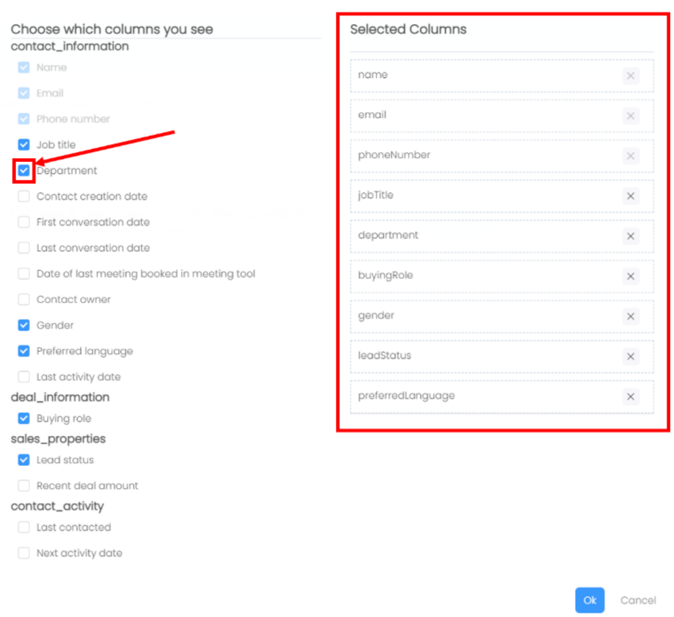
7. List View Column Configure for Contacts

a. Dashboard > Contacts > Contact.

b. In the right corner, there is a button named “Table actions”. After clicking it, a dropdown menu will appear. Select “Edit Columns” from that. A new popup will appear.



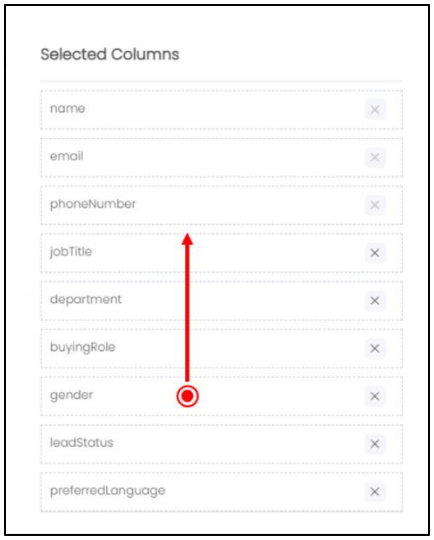
c. From this popup you can choose options by clicking on the box on the left side of the options. They will be marked as checked.

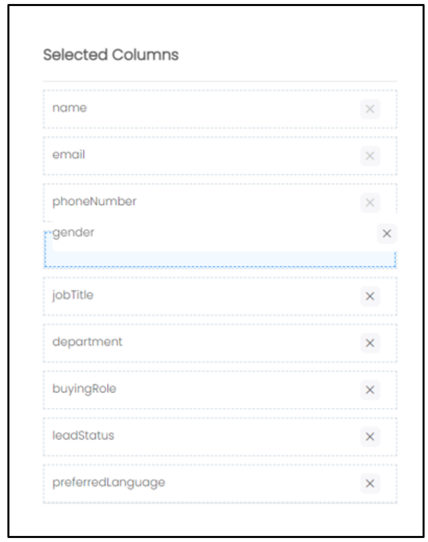


d. Your marked items will be displayed on the right side named “Selected Columns". These selected items will be shown in this order as the column title and information of only these columns will be shown on the “Contact” page.

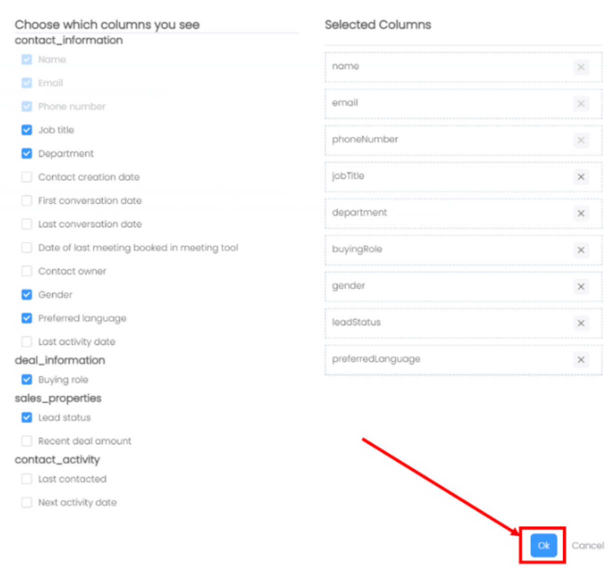
e. To deselect any item, click the cross button from the right side of the items from the “Selected Columns” list or, mark the items uncheck by clicking on the box beside the items from the left part of the page.

f. To reorder click and hold an item and drag it up/down.





g. After all the settings are completed, click on the “Ok” button located at the bottom right corner of the popup. You will be directed to the “Contact” page.



8. List View Column Configure for Companies

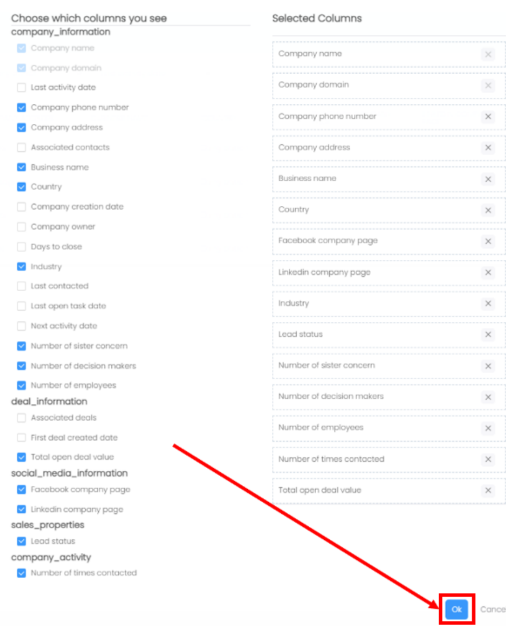
a. Dashboard > Contacts > Companies.

b. Follow steps b, c from the "List View Column Configure for Contacts" segment.

c. Your marked items will be displayed on the right side named "Selected Columns". These selected items will be shown in this order as the column title and information of only these columns will be shown on the "Company" page.

d. Follow steps e, f from the "List View Column Configure for Contacts" segment.

e. After all the settings are completed, click on the "Ok" button located at the bottom right corner of the popup. You will be directed to the "Company" page.

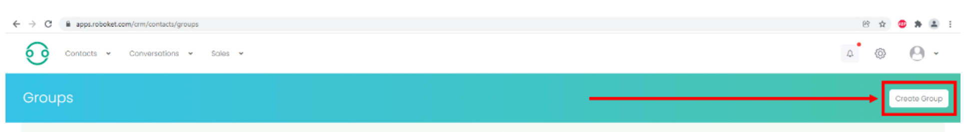


9. Create, Update, Delete Contact Groups

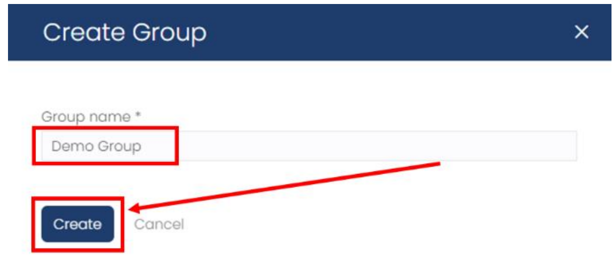
a. Dashboard > Contacts > Contact Groups.

b. Create

i. In the right corner, there is a button named "Create Group" and click on it. A new popup will appear on the right side of the window.

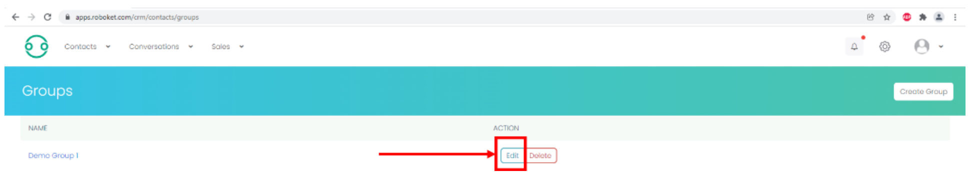


ii. Enter a name for your new group in the field under the title "Group name" and click "Create". A new contact group will be created.

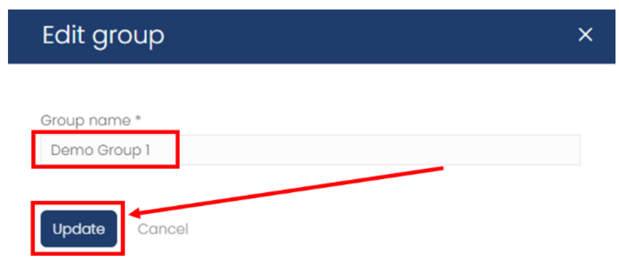


c. Update

i. In the list of your groups, under the “Action” column there is a button named “Edit”. A new popup will appear where you can update the group name.

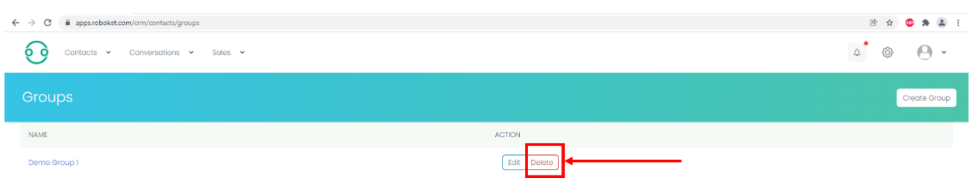


ii. Update the name of the group in the field under the title “Group name” and click “Update”. Your contact group name will be updated.

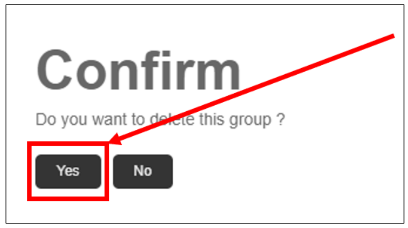


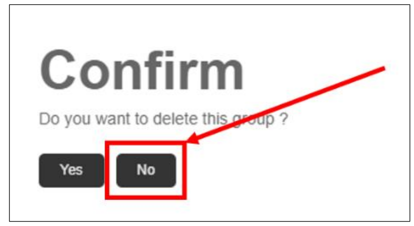
d. Delete

i. In the list of your groups, under the “Action” column there is a button named “Delete”.



ii. A new popup will appear. If you are determined to delete the group, then click on the “Yes” button. Otherwise click on the “No” button. If you delete a group, only that group will be deleted. Your contacts will not be.



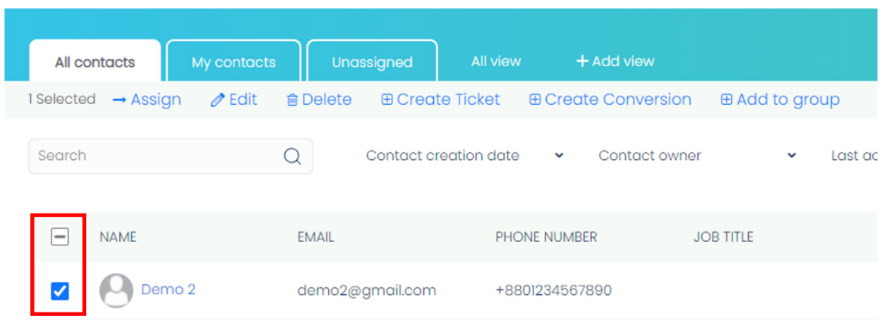


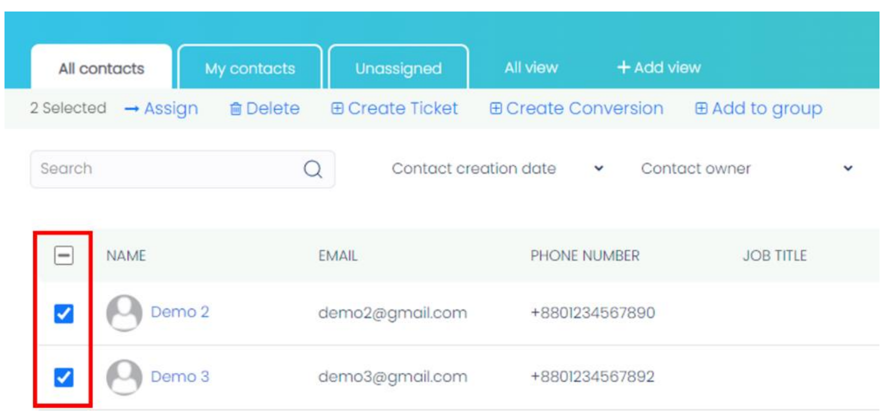
10. Batch Action and Single Action for Contacts

a. Assign

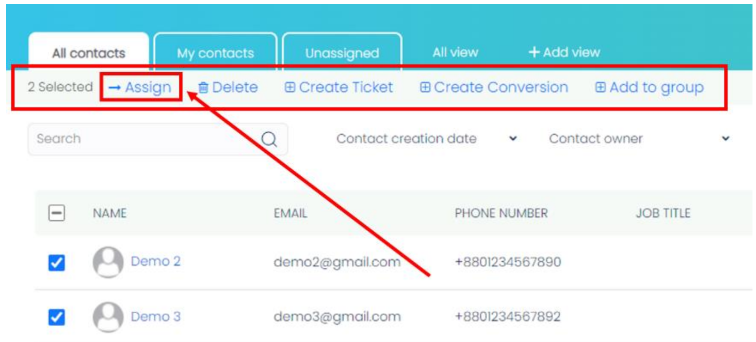
i. Dashboard > Contacts > Contact.

ii. In the list of your contacts, there is a check box in the very left side of each row. Click on the box to mark them as checked. You can mark multiple rows.





iii. A new menu will appear under the “Contact Views”. The number of rows you have selected will be visible. Beside that in that menu there is a button named “Assign”. Click on it.

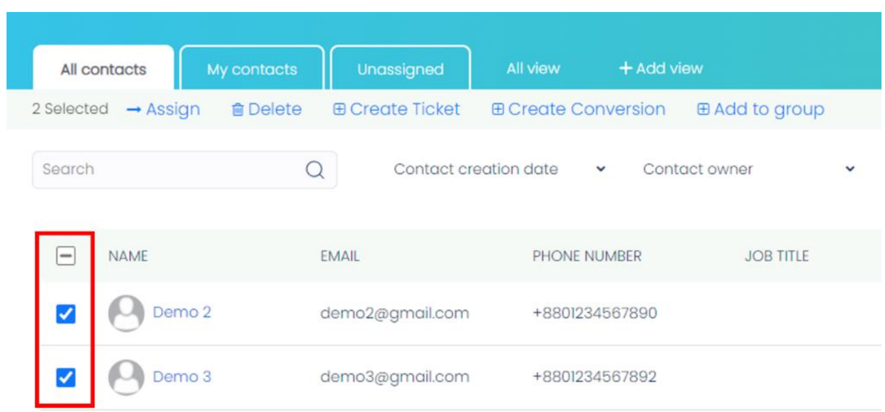


iv. A new popup will appear where you have to click on the dropdown just below the "Assign Contacts" title. Select a name as "Owner" for that contact. Click on the "Assign" button from that popup.

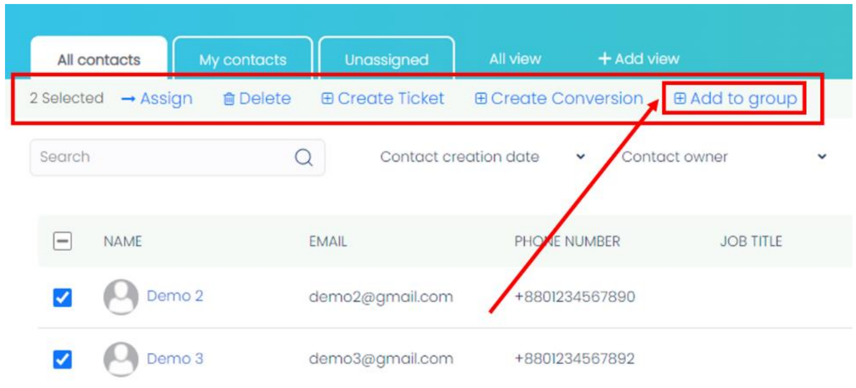
b. Add to Group

i. Dashboard > Contacts > Contact.

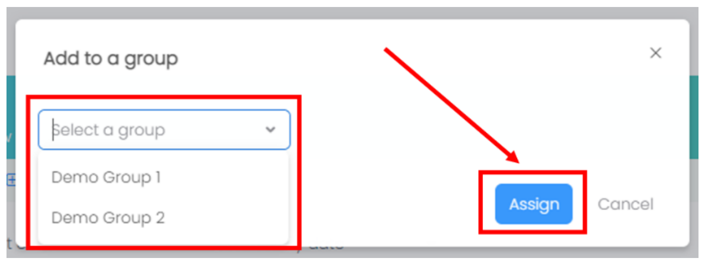
ii. In the list of your contacts, there is a check box in the very left side of each row. Click on the box to mark them as checked. You can mark multiple rows.



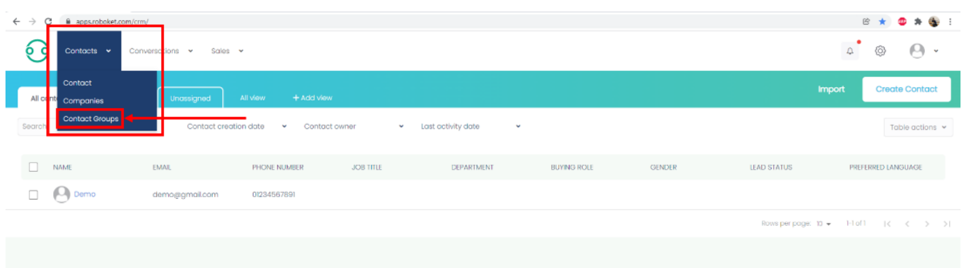
iii. A new menu will appear under the "Contact Views". The number of rows you have selected will be visible. In that menu there is a button named "Add to group". Click on it.



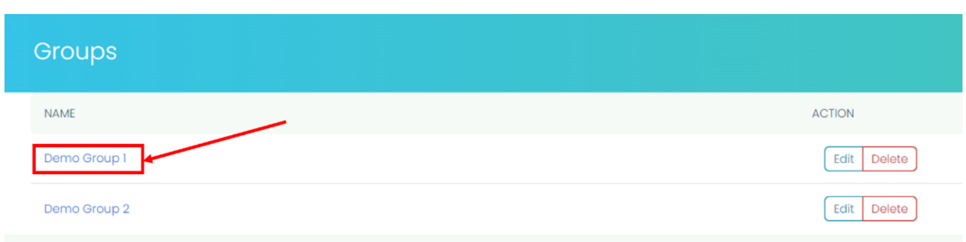
iv. A new popup will appear where you have to click on the dropdown just below the “Add to a group” title. Select a group for that contact. Click on the “Assign” button from that popup.

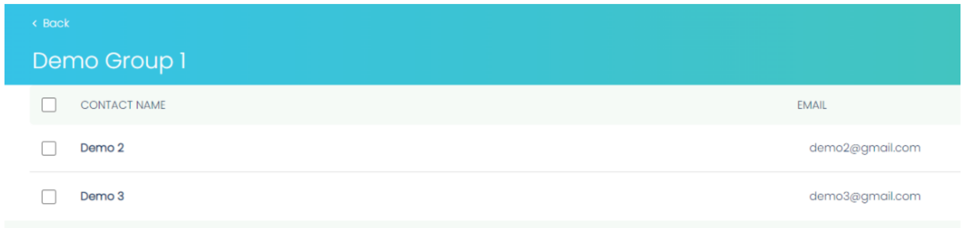


v. To check that, go to Dashboard > Contacts > Contact Groups.

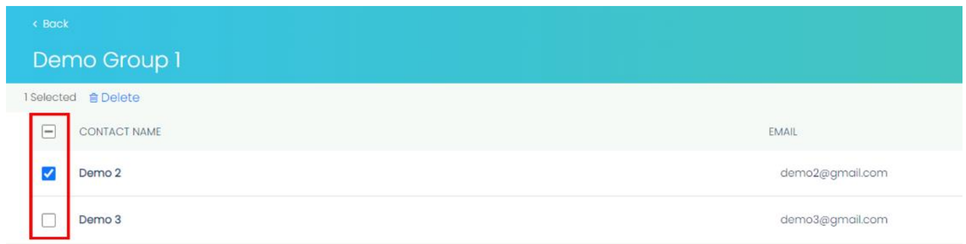


vi. Click on the group. Your newly added contacts will be visible here.

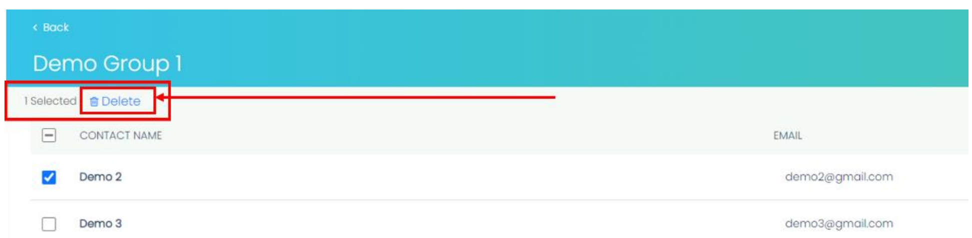




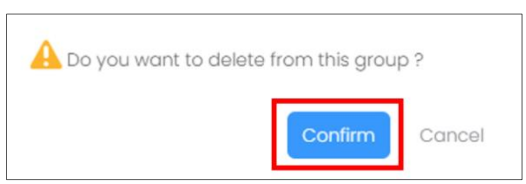
vii. If you want to remove any contact from the group, click on the box beside the name of the contact to mark them check. You can mark multiple contacts.



viii. A new menu will appear. The number of rows you have selected will be visible there. In that menu click on the button named "Delete".



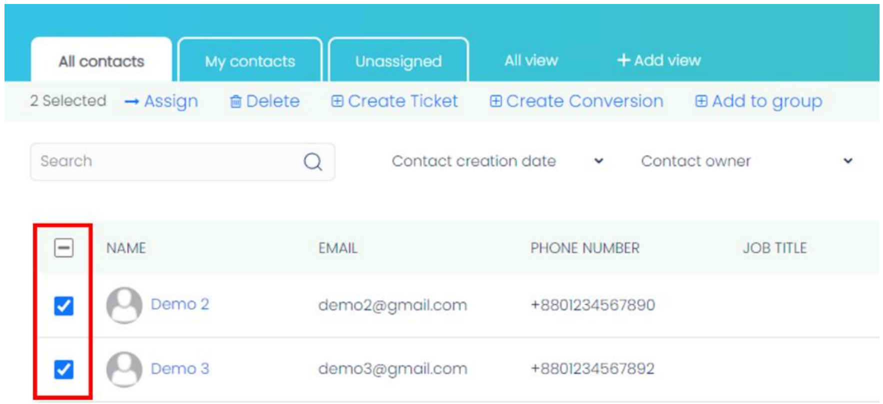
ix. A new popup will appear. If you are determined, then click on "Confirm". Otherwise click on "Cancel".



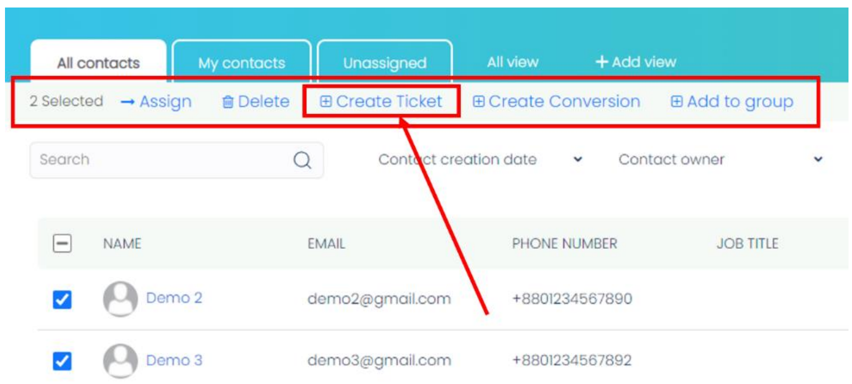
c. Create Ticket

i. Dashboard > Contacts > Contact.

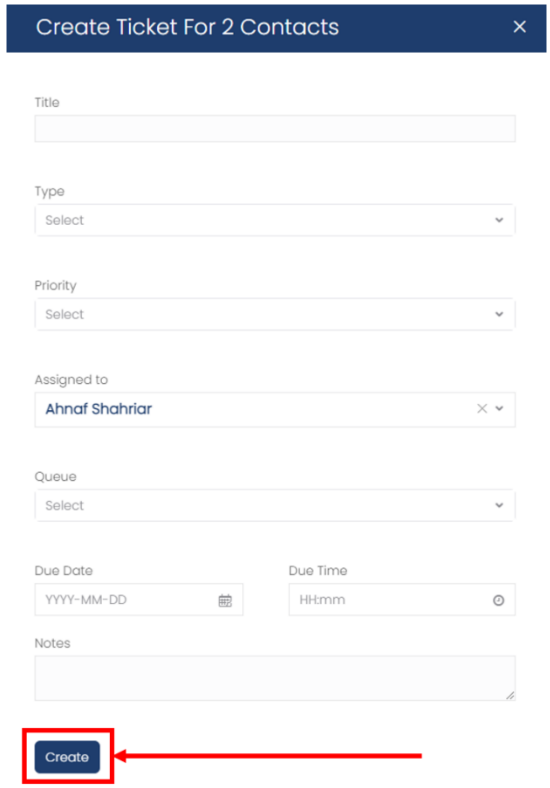
ii. In the list of your contacts, there is a check box in the very left side of each row. Click on the box to mark them as checked. You can mark multiple rows.



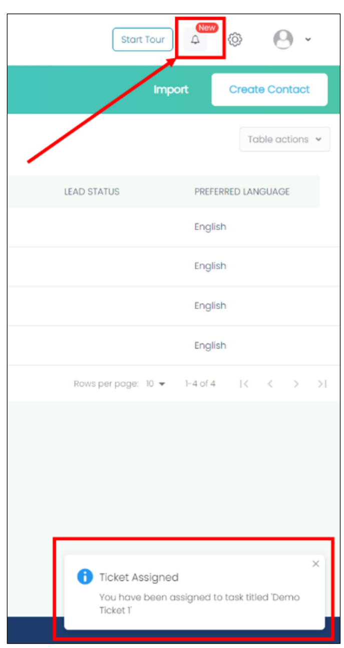
iii. A new menu will appear under the “Contact Views”. The number of rows you have selected will be visible. Beside that in that menu there is a button named “Create Ticket”. Click on it.

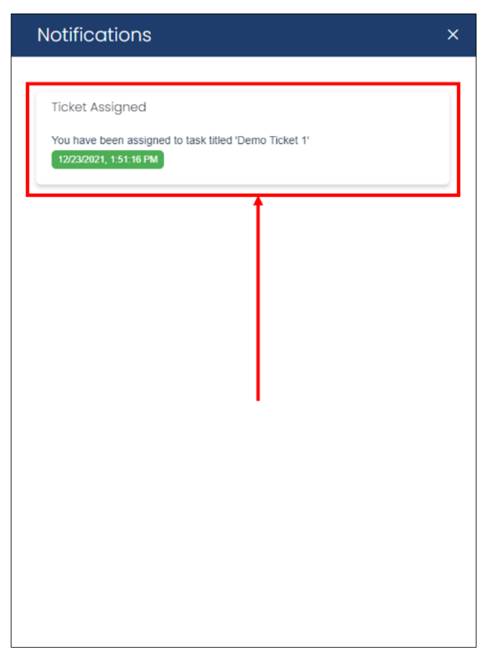


iv. A new drawer will appear on the right side of the window. After filling up all the fields click the button “Create” below them.



v. A new ticket will be assigned and you will receive a new notification. By clicking on the notification button at the top right corner of the page, the notification drawer will open where you can see it on the top.



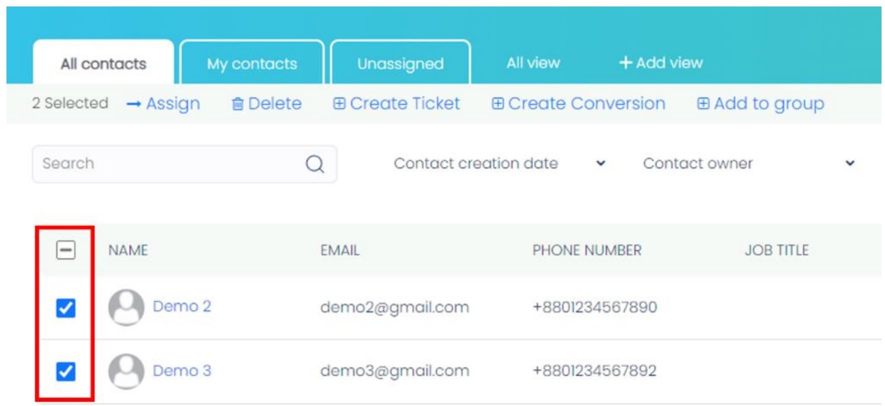


vi. Click on the notification, you will be directed to the “Tickets” page. There your newly assigned ticket will appear.

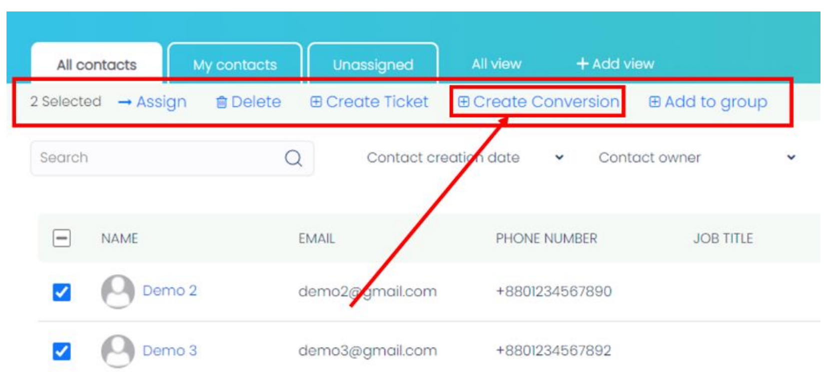
d. Create Conversion

i. Dashboard > Contacts > Contact.

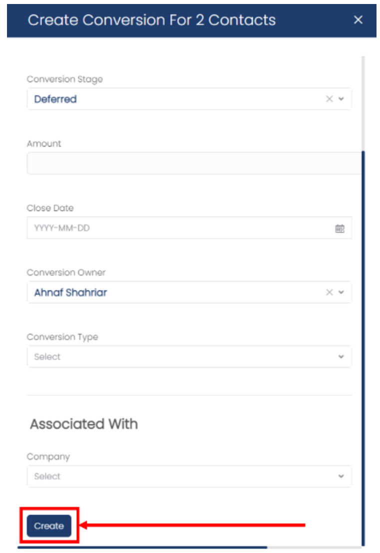
ii. In the list of your contacts, there is a check box in the very left side of each row. Click on the box to mark them as checked. You can mark multiple rows.



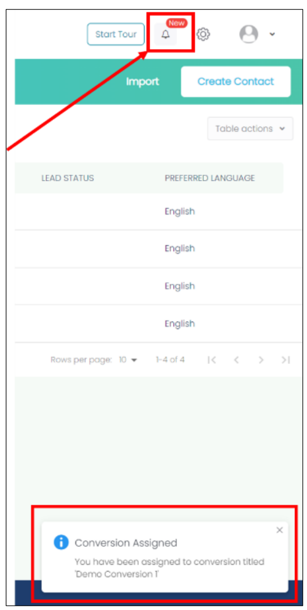
iii. A new menu will appear under the “Contact Views”. The number of rows you have selected will be visible. Beside that in that menu there is a button named “Create Conversion”. Click on it.

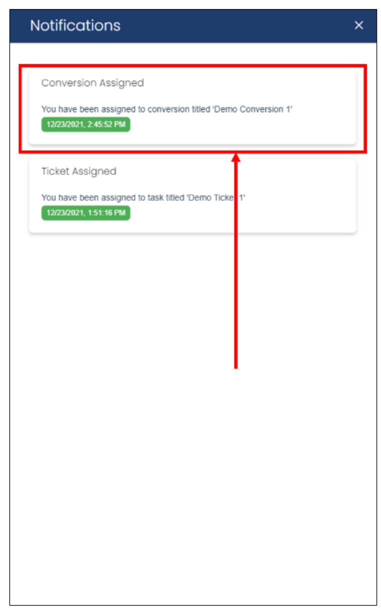


iv. A new drawer will appear on the left side of the window. After filling up all the fields click the button “Create” below them.



v. A new conversion will be assigned and you will receive a new notification. By clicking on the notification button at the top right corner of the page, the notification drawer will open where you can see it on the top.

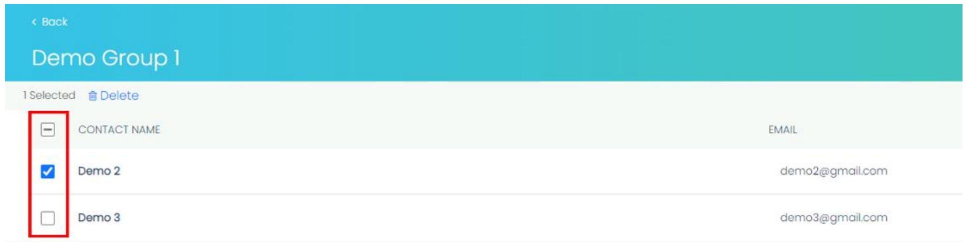




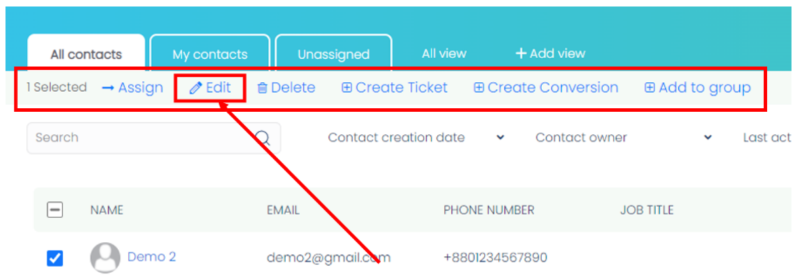
e. Edit

i. Dashboard > Contacts > Contact.

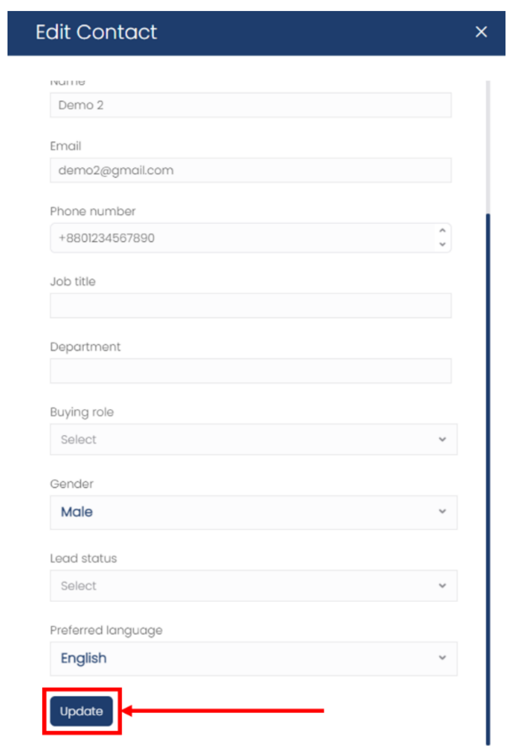
ii. In the list of your contacts, there is a check box in the very left side of each row. Click on the box to mark them as checked.



iii. A new menu will appear under the “Contact Views”. The number of rows you have selected will be visible. Beside that in that menu there is a button named “Edit”. Click on it.



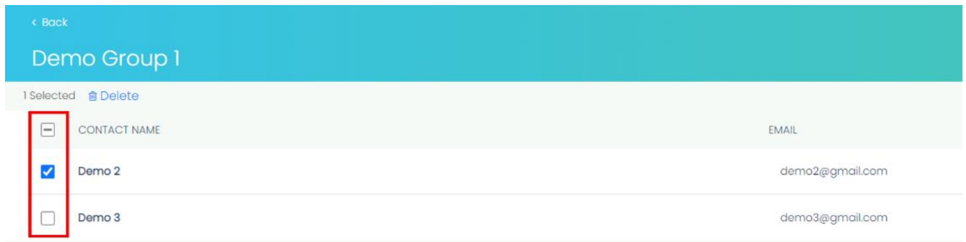
iv. A new drawer will appear on the left side of the window where you can update contact information. After updating, click the button “Update” below them. Your contact will be updated.



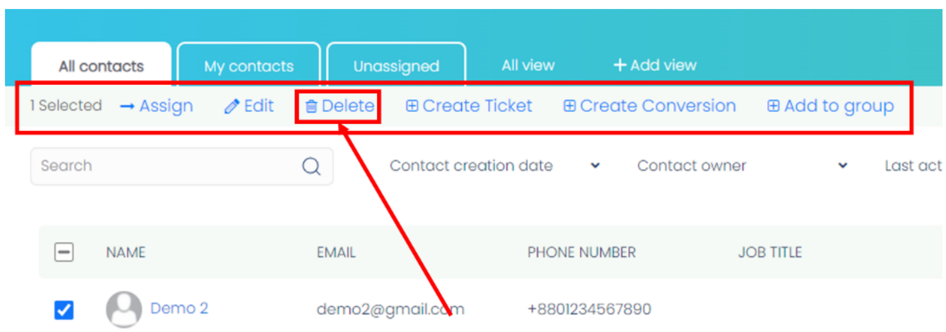
f. Delete

i. Dashboard > Contacts > Contact.

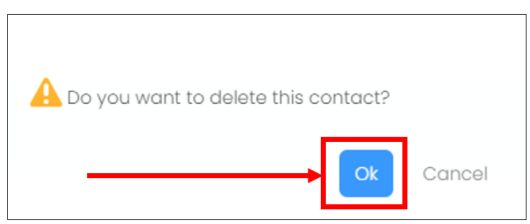
ii. In the list of your contacts, there is a check box in the very left side of each row. Click on the box to mark them as checked. You can mark multiple rows.



iii. A new menu will appear under the "Contact Views". The number of rows you have selected will be visible. Beside that in that menu there is a button named "Delete". Click on it.



iv. A new popup will appear. If you are determined, then click on "Ok". Otherwise click on "Cancel".

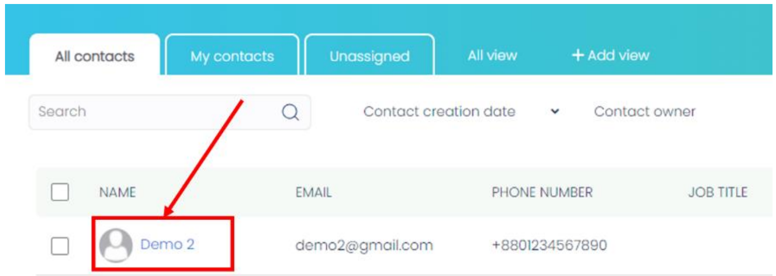


11. All Activities for Contacts

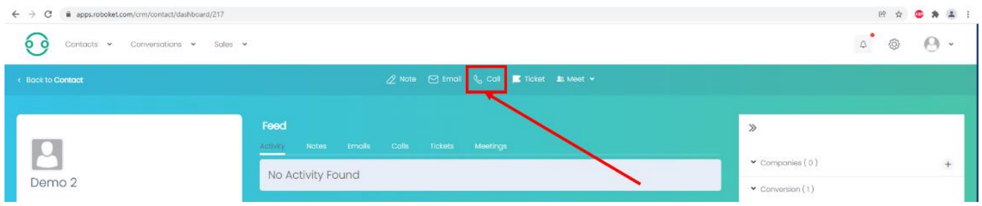
a. Call

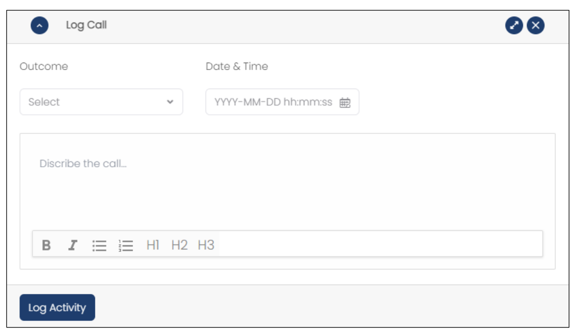
i. Dashboard > Contacts > Contact.

ii. Click on the name of any contact. You will be directed to the contact dashboard.

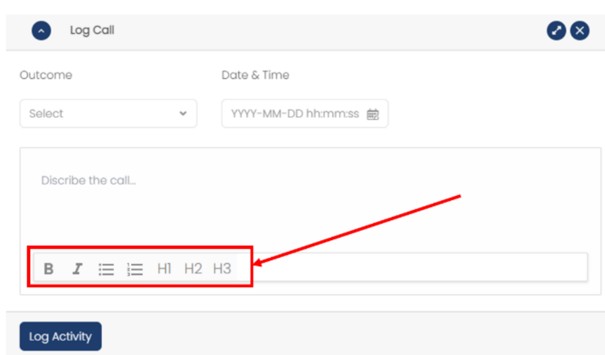


iii. Click on the "Call" button from the menu under the "Main Menu Bar". A popup will appear where you can log a call.

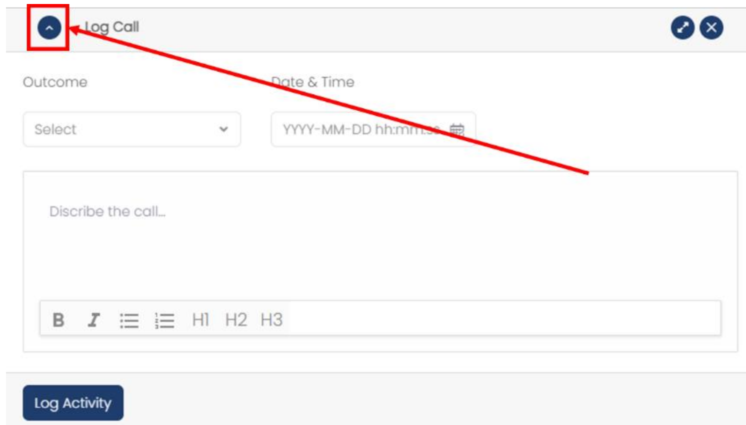


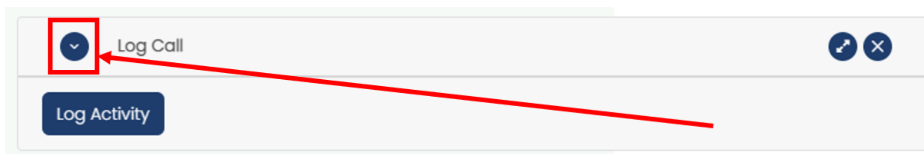


iv. Fill up all the fields. You can customize the text while writing a description of the call.

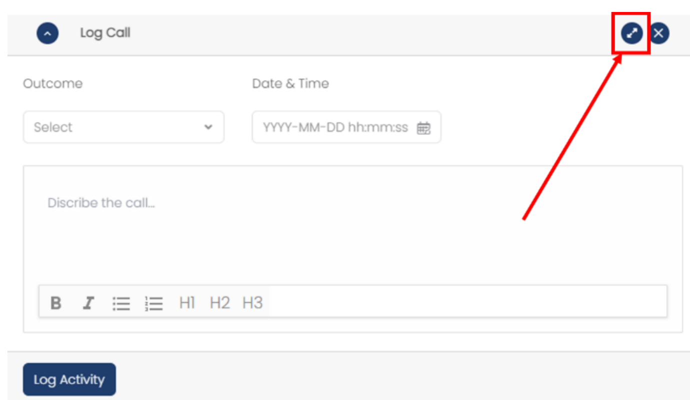


v. You can minimize and maximize the popup by clicking on the arrow button on the top left corner of the popup.

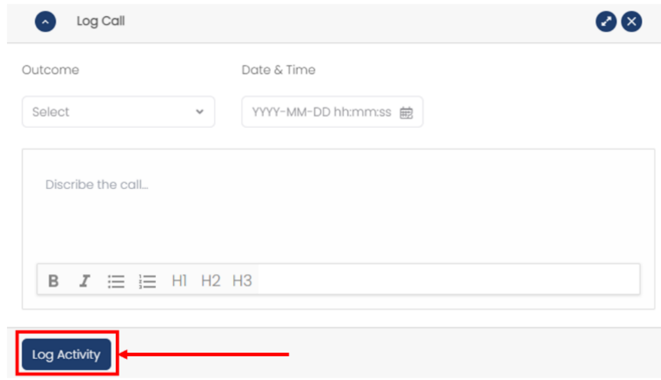




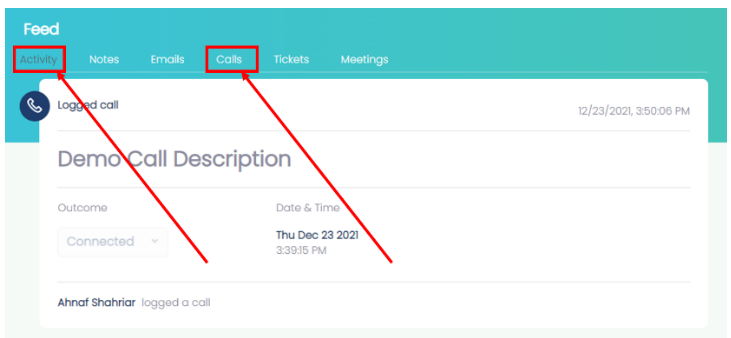
vi. You can convert the popup into full screen and return back to its original shape by clicking on the button from the top right corner beside the “close” button.



vii. After all the editing, you can log the call by clicking on the “Log Activity” button.



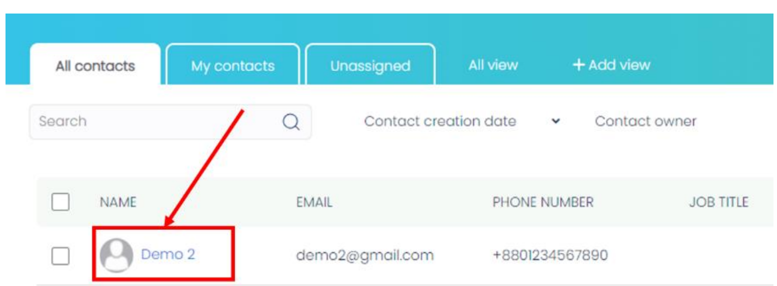
viii. Your logged call with all its information including log creator, time and date of creation will be visible in the "Feed" which is located in the middle of the window under both "Activity" and "Calls". You can go and visit them by clicking on those buttons. Latest activities will be at the top in the feed.



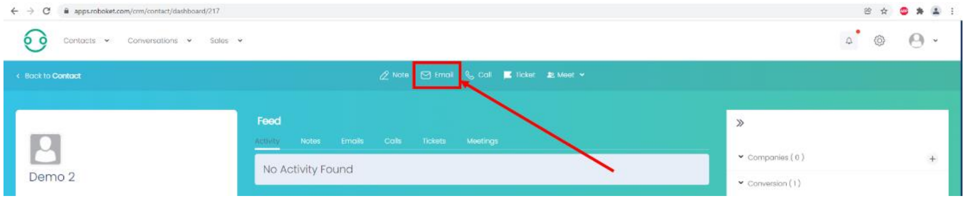
b. Email

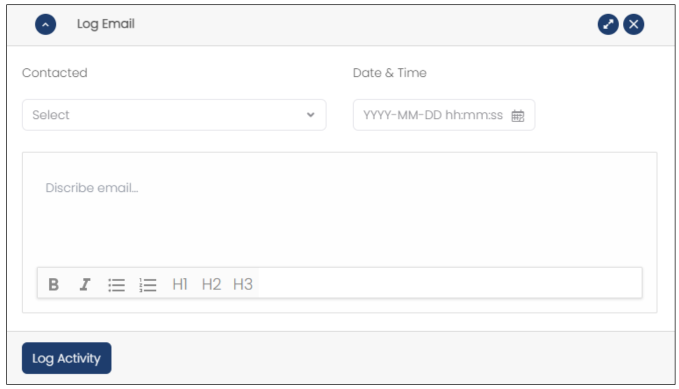
i. Dashboard > Contacts > Contact.

ii. Click on the name of any contact. You will be directed to the contact dashboard.

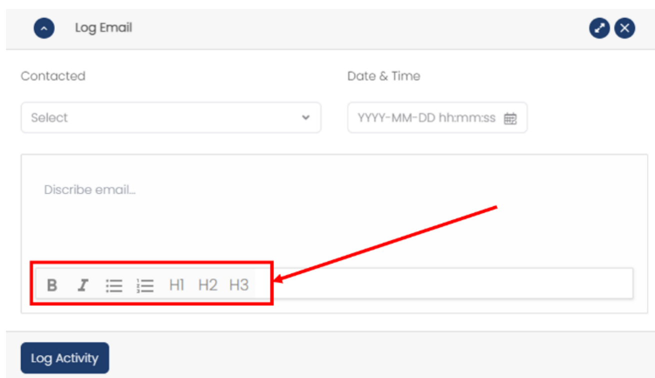


iii. Click on the "Email" button from the menu under the "Main Menu Bar". A popup will appear where you can log an email.

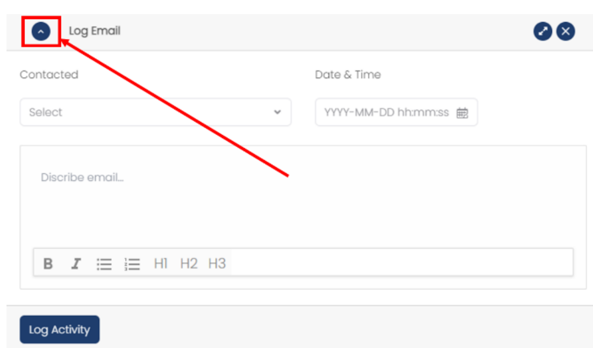


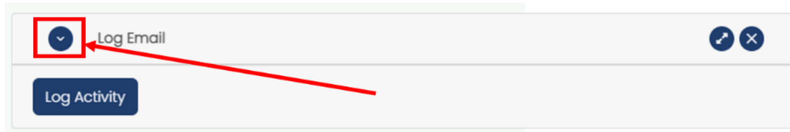


iv. Fill up all the fields. You can customize the text while writing a description of the email.

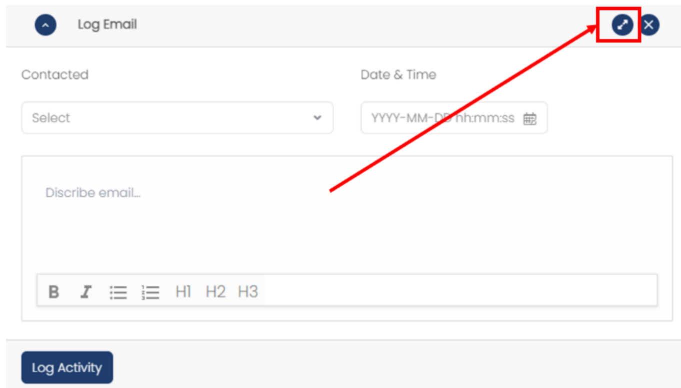


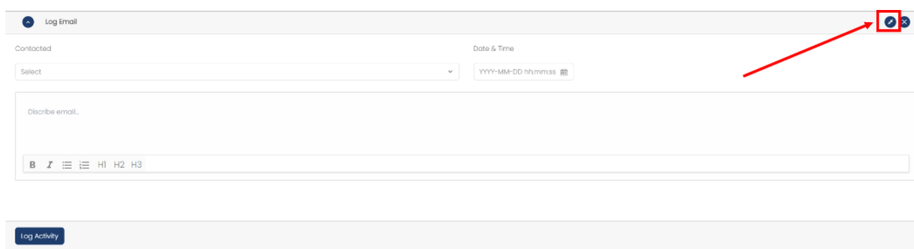
v. You can minimize and maximize the popup by clicking on the arrow button on the top left corner of the popup.



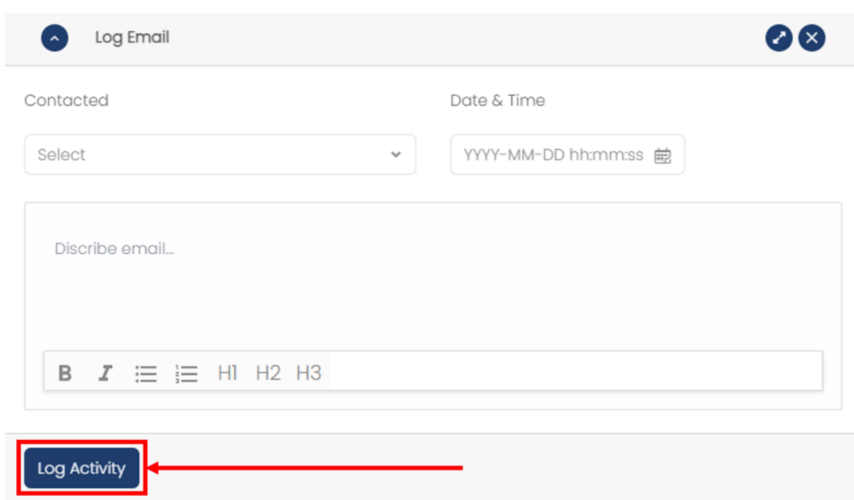


vi. You can convert the popup into full screen and return back to its original shape by clicking on the button from the top right corner beside the “close” button.

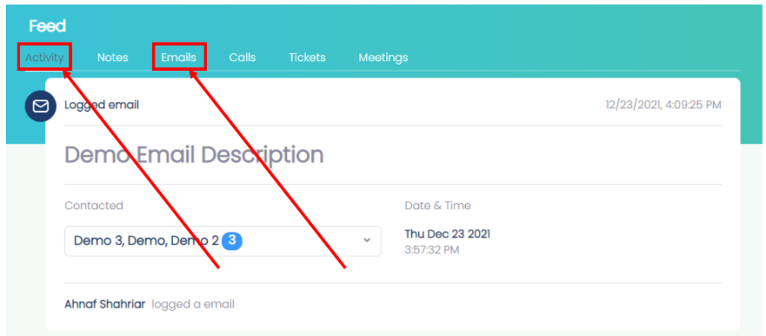




vii. After all the editing, you can log the email by clicking on the “Log Activity” button.



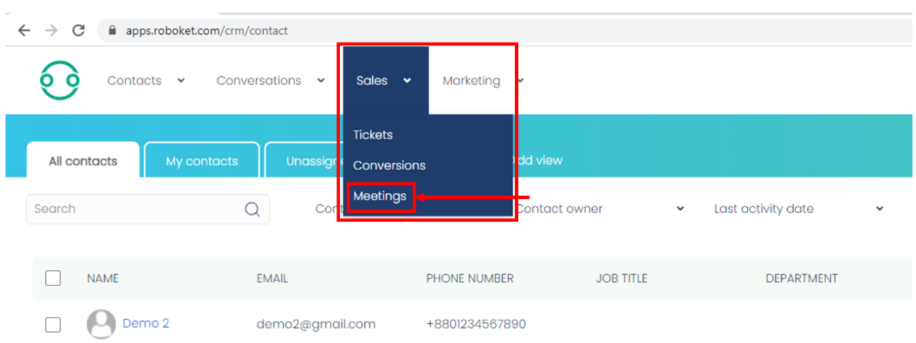
viii. Your logged email with all its information including log creator, time and date of creation will be visible in the "Feed" which is located in the middle of the window under both "Activity" and "Emails". You can go and visit them by clicking on those buttons. Latest activities will be at the top in the feed.



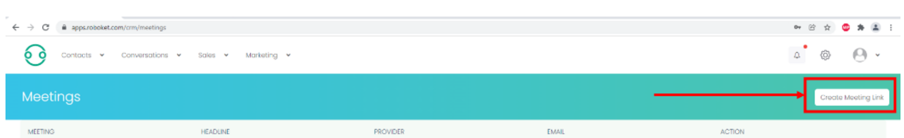
c. Meeting

i. Create Meeting

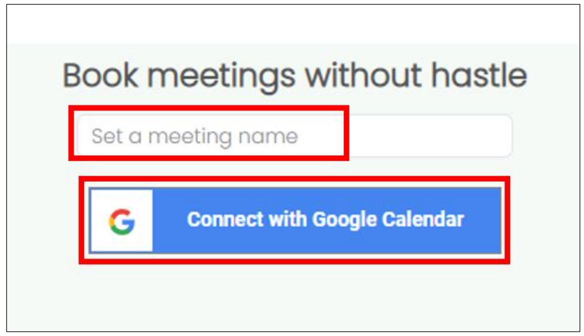
1. First of all, you have to create a meeting link, if you do not have created one. If you have one, then jump to step 12.
2. In the dashboard, there is a button named "Sales" in the "Main Menu Bar" at the top of the page. After clicking it, a dropdown menu will appear and select "Meetings" from that.



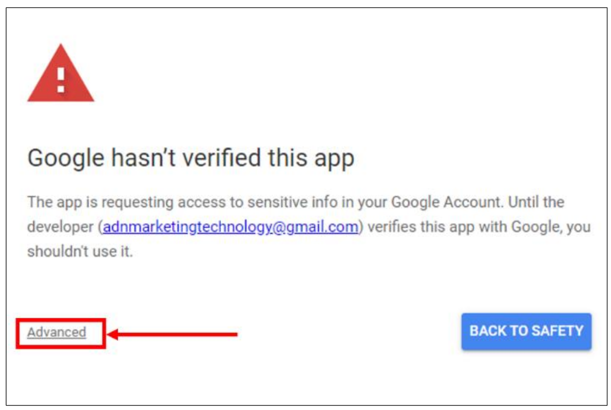
3. In this page, click on the "Create Meeting Link" from the top right corner.

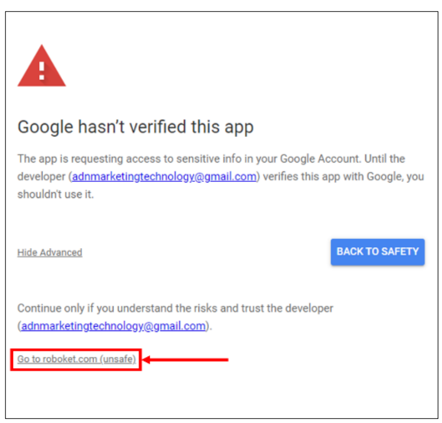


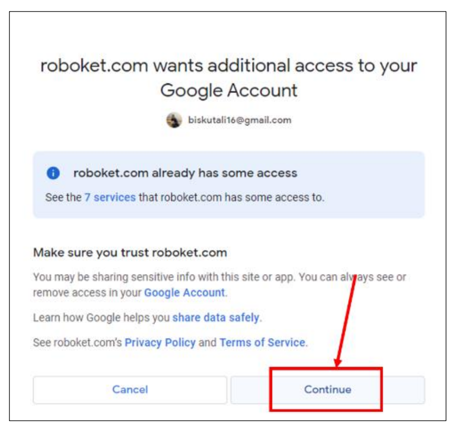
4. Enter a name for the meeting in the field and click on the "Connect with Google Calendar" button. Now you have to sign in or choose your google account.



5. Allow permission for Roboket to your google account. Click on "Advanced" and "Go to roboket.com". Then click on "Continue".

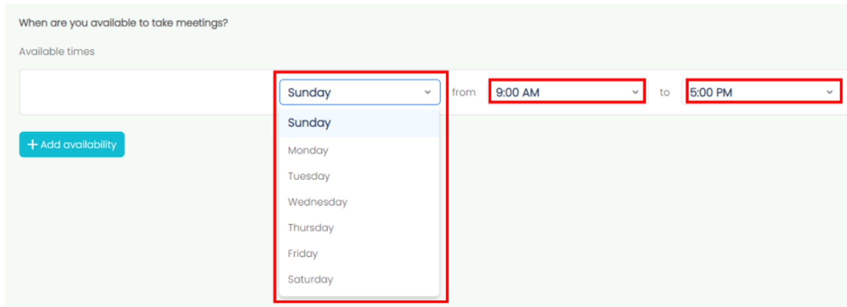




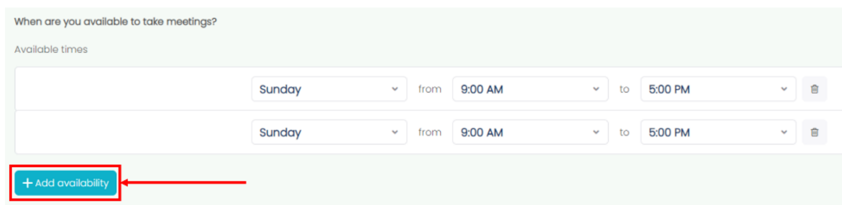


6. In this page, add day and timing when you are available in a week. Each row is available only for one day of the week.

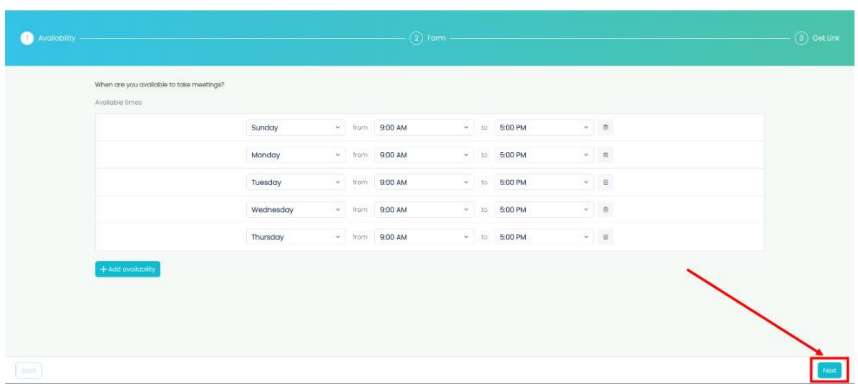
7. To change the day, click on the “Sunday” and a dropdown menu will appear. Select any day. To change time, click on the times and select.



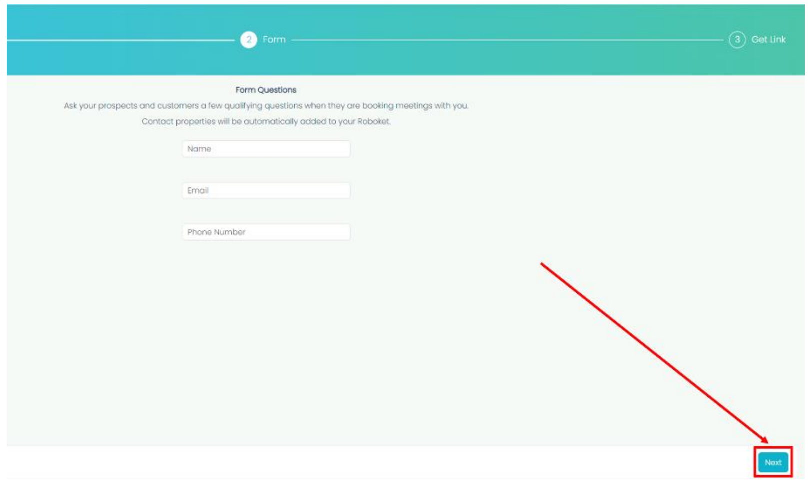
8. If you want to add multiple days, click on the button named “Add availability” where you can edit the day and time following step 7.



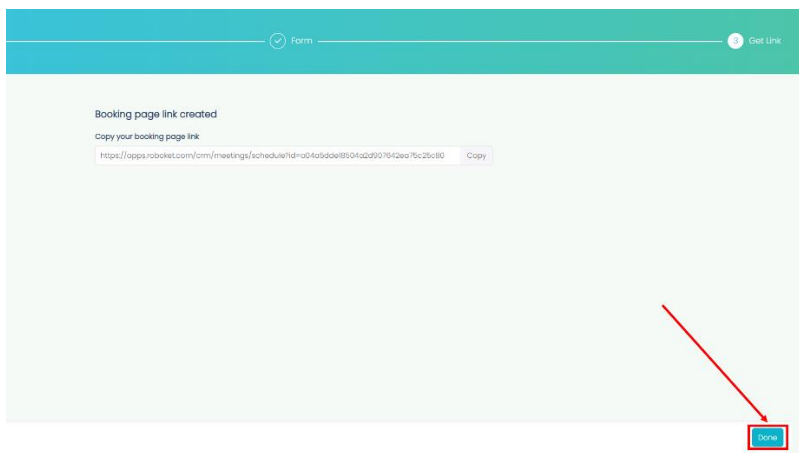
9. After finishing editing your availability, click on the “Next” button in the bottom right corner of the page.



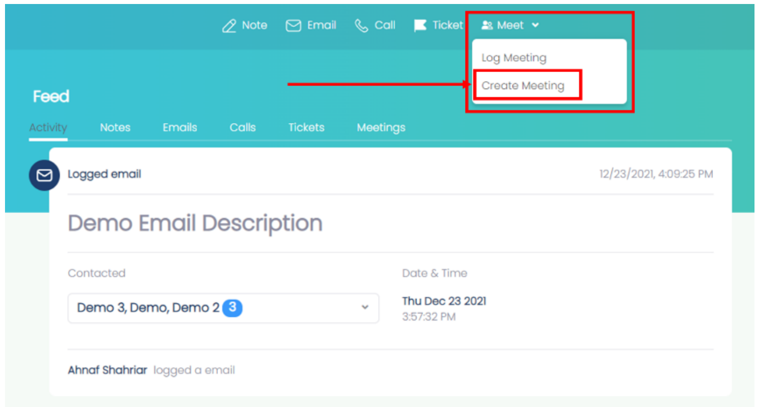
10. Fill up the form if you have any questions and click the “Next” button in the bottom right corner of the page.



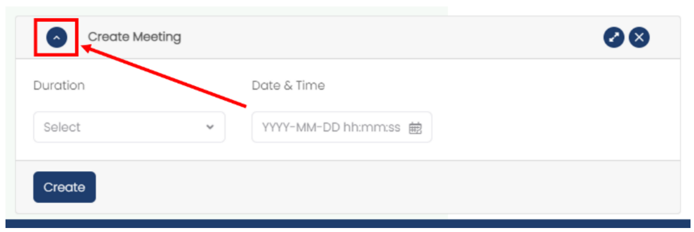
11. Click the “Done” button in the bottom right corner of the “Get Link” page. Your meeting link will be created and directed to “Meetings” page where your created meeting link will be visible.

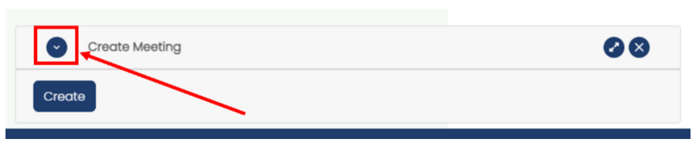


12. Dashboard > Contacts > Contact.
13. Click on the name of any contact. You will be directed to the contact dashboard.
14. Put your cursor on the “Meet” button from the menu under the “Main Menu Bar”. A dropdown menu will appear. Click on “Create Meeting”.

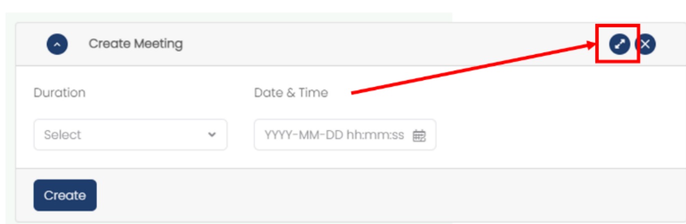


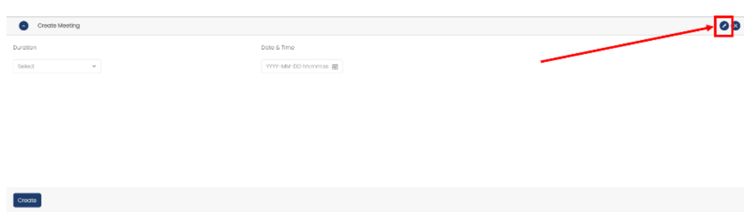
15. A popup will appear where you can create a meeting.
16. You can minimize and maximize the popup by clicking on the arrow button on the top left corner of the popup.



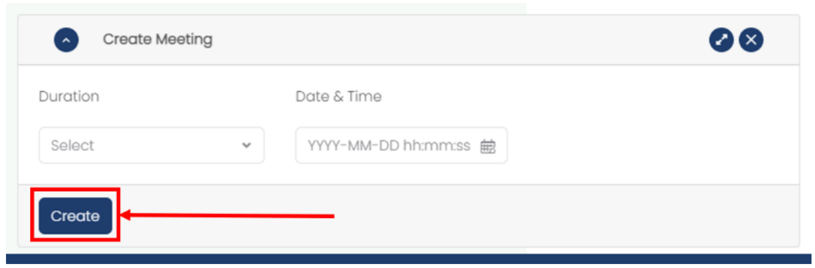


17. You can convert the popup into full screen and return back to its original shape by clicking on the button from the top right corner beside the “close” button.

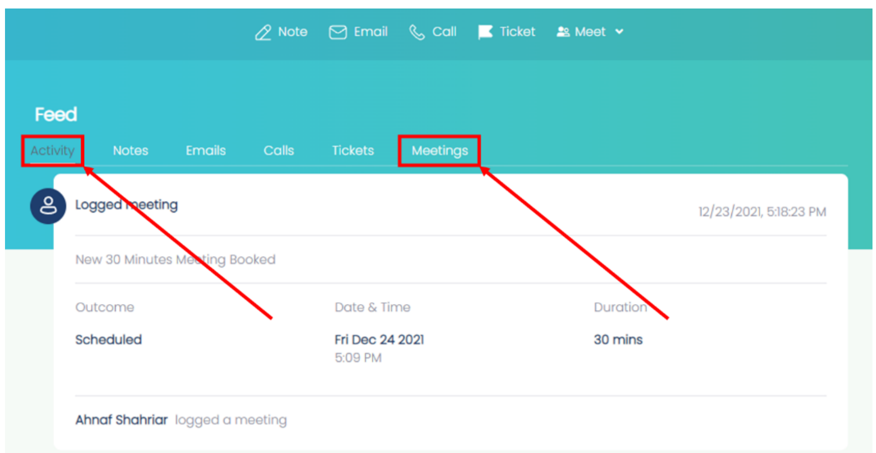




18. Fill up all the fields and click on the “Create” button.

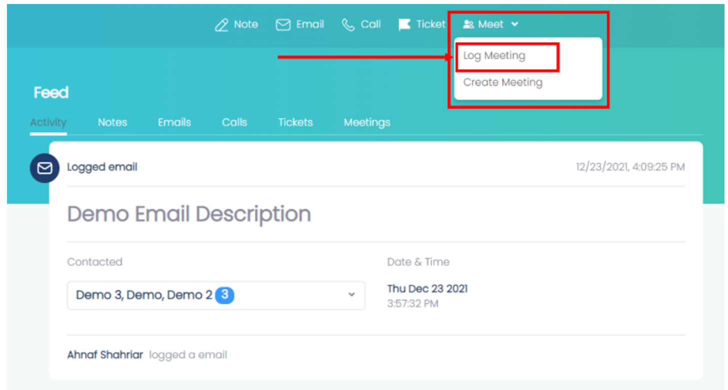


19. Your created meeting with all its information including log creator, time and date of creation will be visible in the “Feed” which is located in the middle of the window under both “Activity” and “Meetings”. You can go and visit them by clicking on those buttons. Latest activities will be at the top in the feed.

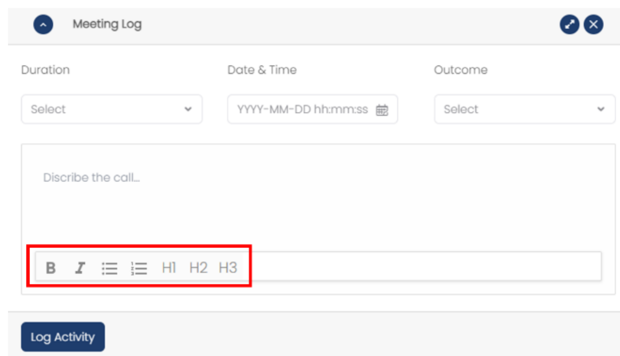


ii. Log Meeting

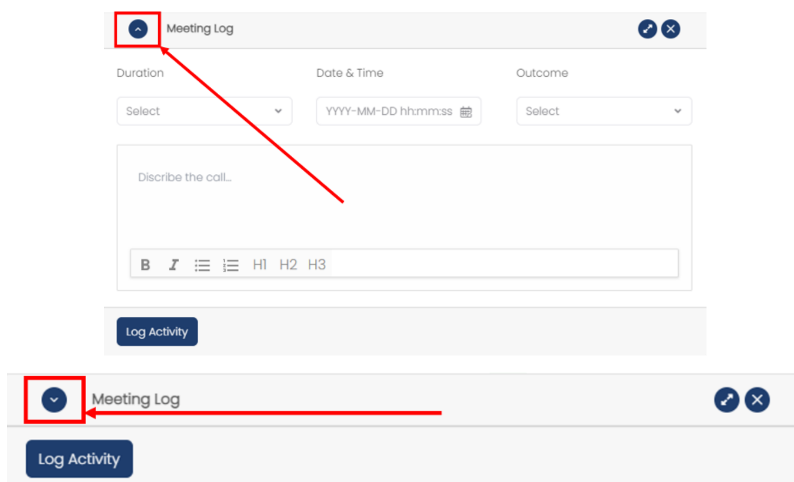
1. Dashboard > Contacts > Contact.
2. Click on the name of any contact. You will be directed to the contact dashboard.
3. Put your cursor on the “Meet” button from the menu under the “Main Menu Bar”. A dropdown menu will appear. Click on “Log Meeting”.



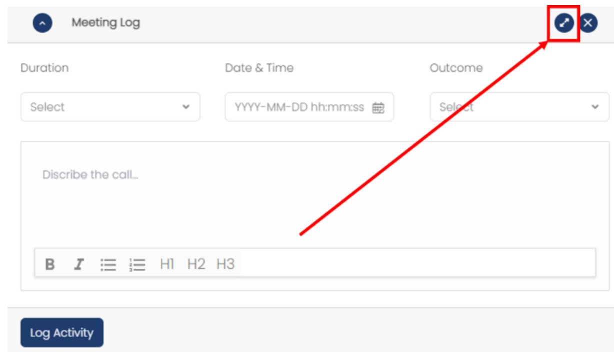
4. A popup will appear where you can log a meeting.
5. Fill up all the fields. You can customize the text while writing a description of the meeting.

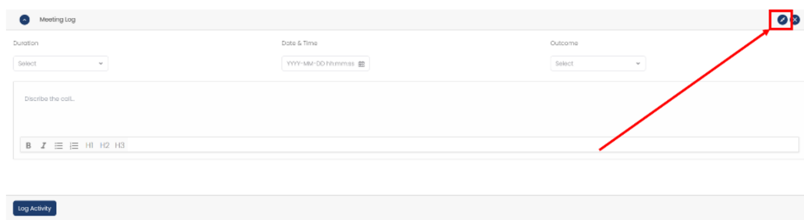


6. You can minimize and maximize the popup by clicking on the arrow button on the top left corner of the popup.

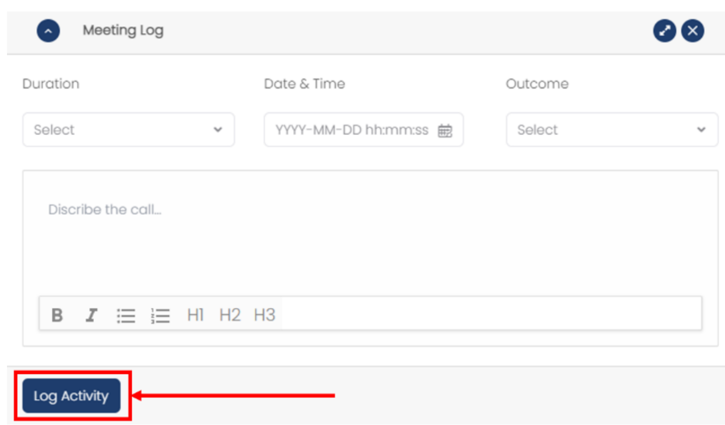


7. You can convert the popup into full screen and return back to its original shape by clicking on the button from the top right corner beside the "close" button.

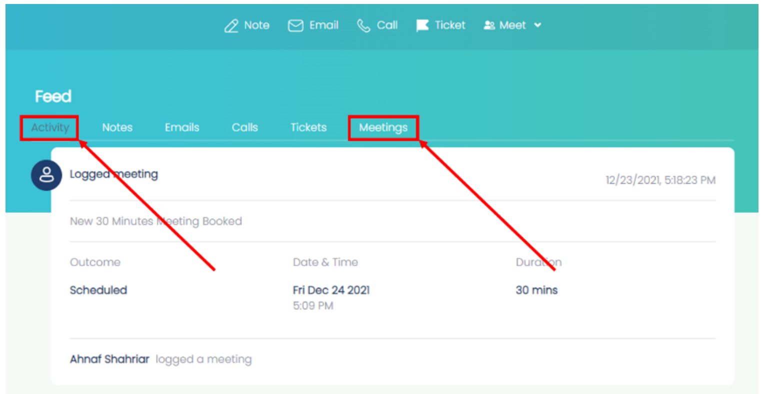




8. After all the editing, you can log the meeting by clicking on the "Log Activity" button.



9. Your logged meeting with all its information including log creator, time and date of creation will be visible in the "Feed" which is located in the middle of the window under both "Activity" and "Meetings". You can go and visit them by clicking on those buttons. Latest activities will be at the top.

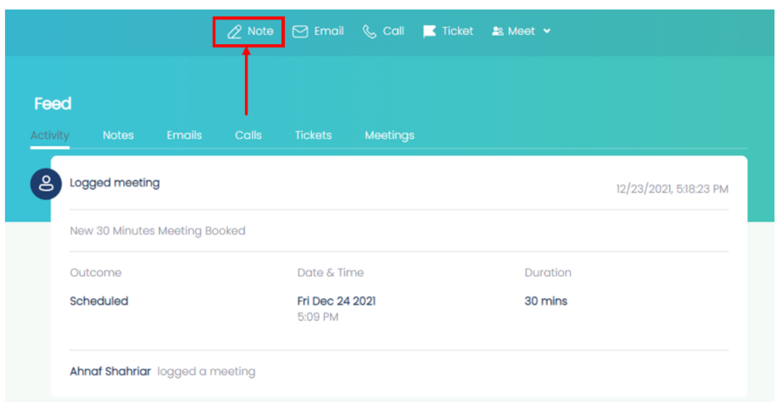


d. Note

i. Dashboard > Contacts > Contact.

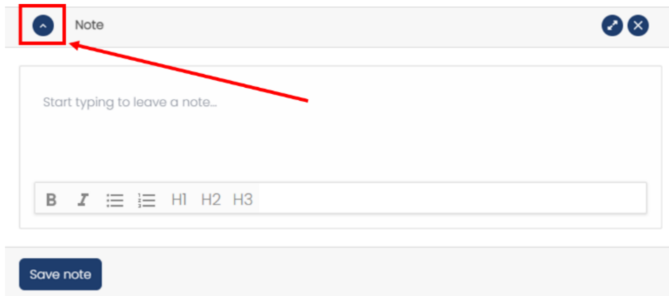
ii. Click on the name of any contact. You will be directed to the contact dashboard.

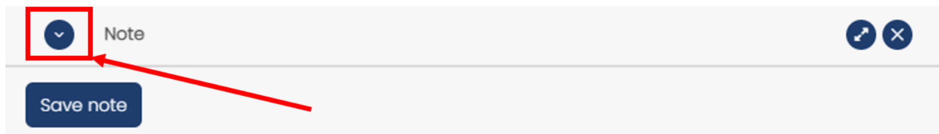
iii. Click on the "Note" button from the menu under the "Main Menu Bar". A popup will appear where you can create a note.



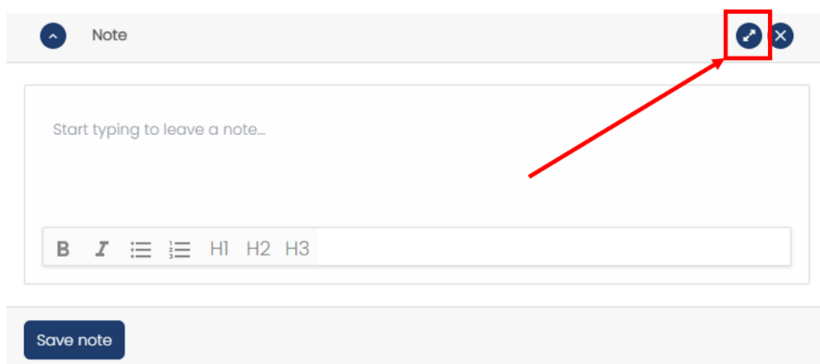
iv. Fill up all the fields. You can customize the text while writing a description of the note.

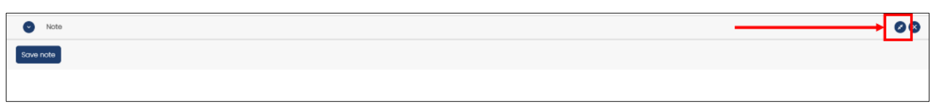
v. You can minimize and maximize the popup by clicking on the arrow button on the top left corner of the popup.



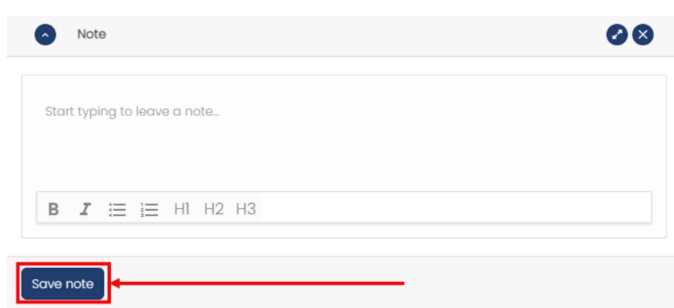


vi. You can convert the popup into full screen and return back to its original shape by clicking on the button from the top right corner beside the "close" button.

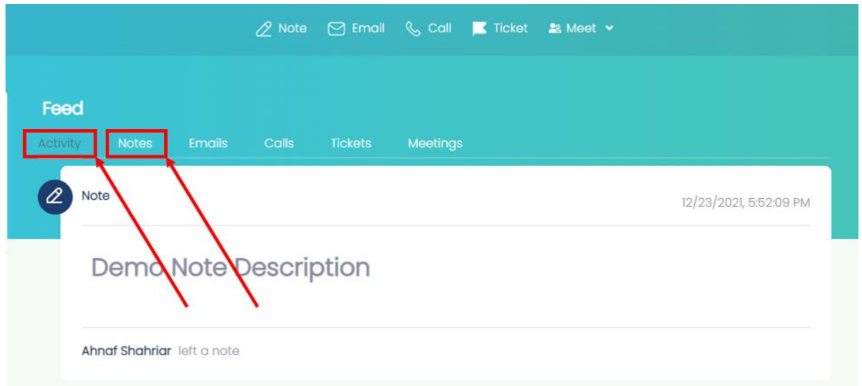




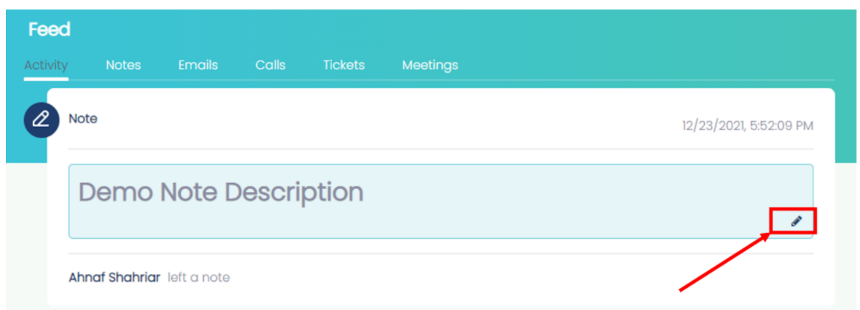
vii. After all the editing, you can save the note by clicking on the "Save Note" button.



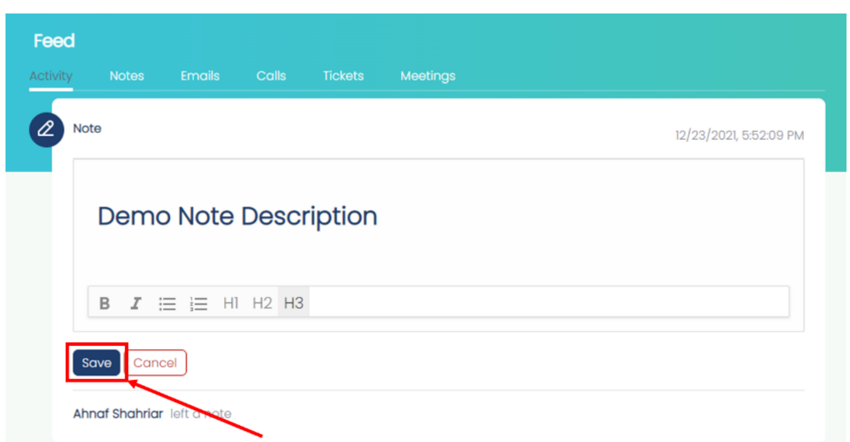
viii. Your created note with all its information including note creator, time and date of creation will be visible in the "Feed" which is located in the middle of the window under both "Activity" and "Notes". You can go and visit them by clicking on those buttons. Latest activities will be at the top in the feed.



ix. You can edit the note after creating it. Put the cursor on the note description and a "pen" icon will appear. Click on that icon and edit it.



x. After editing, click on the "Save" button below.

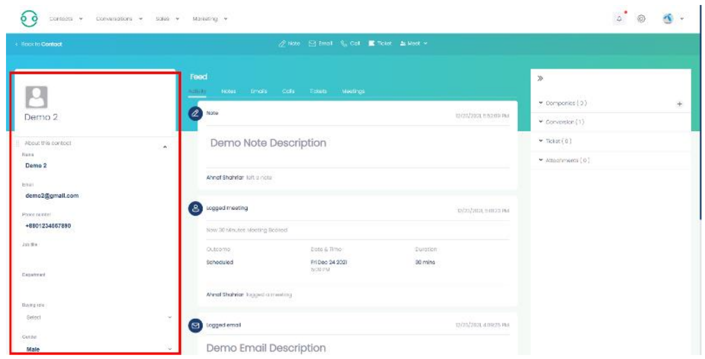


e. Profile Update

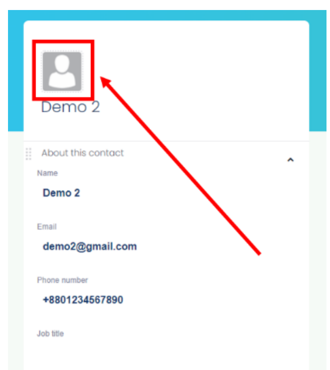
i. Dashboard > Contacts > Contact.

ii. Click on the name of any contact. You will be directed to the contact dashboard.

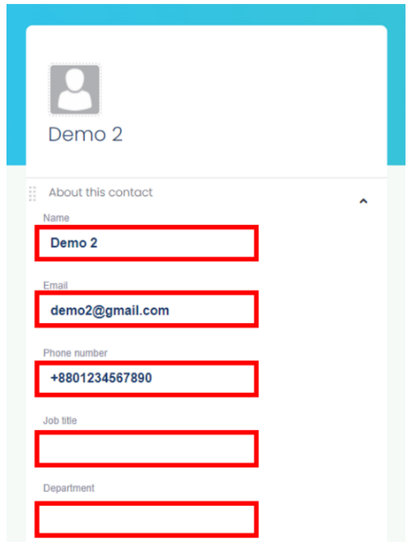
iii. In the left part of the contact dashboard, you will find information about that contact. You can insert or edit this information from this section.



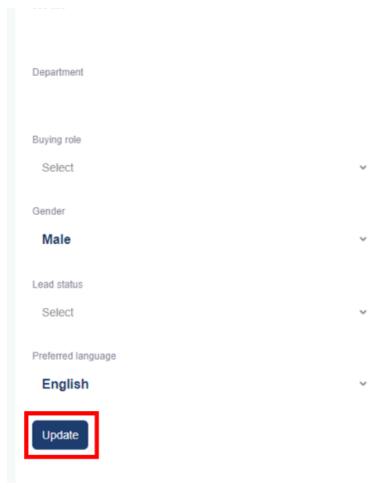
iv. If you want to upload a photo of the contact, click on the photo/camera icon above the contact's name. Select a photo and click "Open" to upload it.



v. Click on the information below the title of any field which you want to edit/insert. You will get either a textbox or dropdown menu to edit/insert.



vi. After completing editing/inserting, click on the “Update” button below.



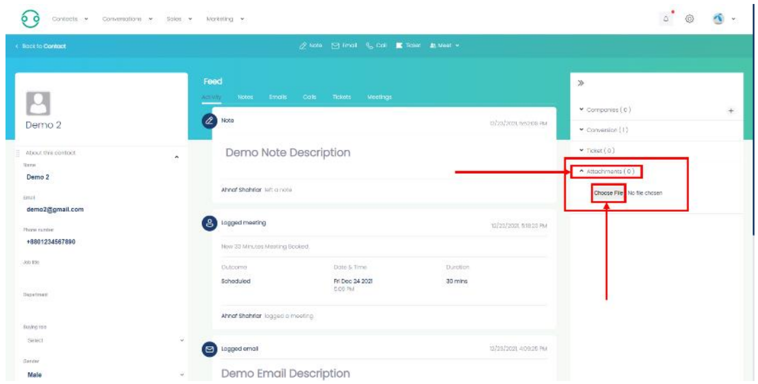
vii. Your edited/inserted information will be visible both in this page and the “Contact” page.

f. Attachments Add & Delete

i. Dashboard > Contacts > Contact.

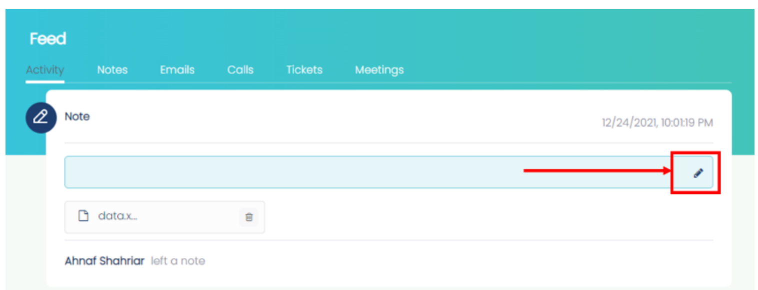
ii. Click on the name of any contact. You will be directed to the contact dashboard.

iii. In the right part of the page, select “Attachments”. A dropdown menu will appear. Click on the button “Choose File”. Select a file from your device and click “Open”.

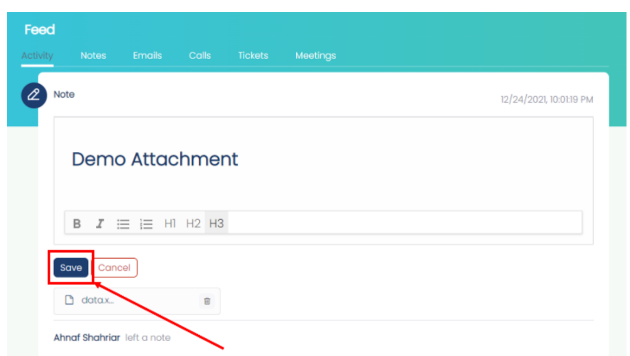


iv. This attachment will be added in both "Activity" and "Notes" as a note in the "Feed".

v. Above the attachment in the feed, there is a space. If you put your cursor on that, a "pen" icon will appear to add a description of that note which contains the attachment. Click on that icon and add a description.

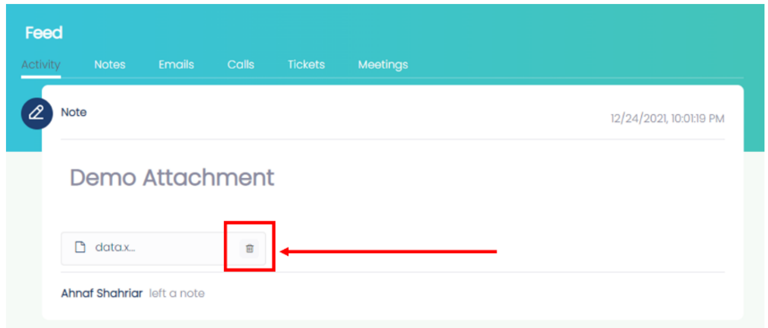


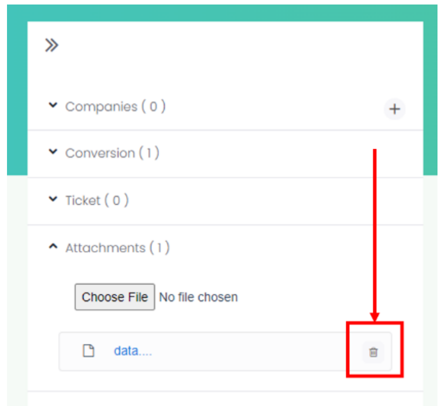
vi. After editing, click on the "Save" button below.



vii. If you want to edit it, you can easily do it following the instructions of "Note" segment.

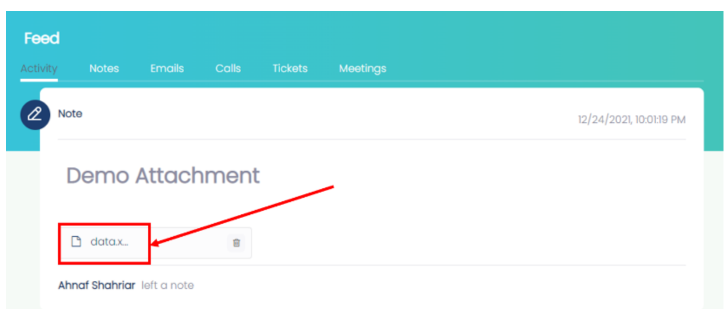
viii. You can delete the attachment along with the note from both in the feed and the attachment segment on the right part of the page.

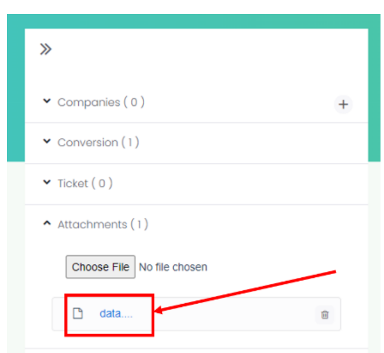




ix. Beside the attachment, you will find a “Bin” icon. Click the icon to remove the attachment along with the note.

x. If you want to download the attachment, click on the name of the attachment. A popup will appear and click “Save”.



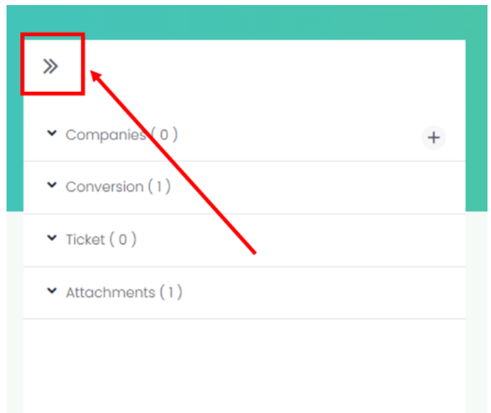


g. View Others

i. Dashboard > Contacts > Contact.

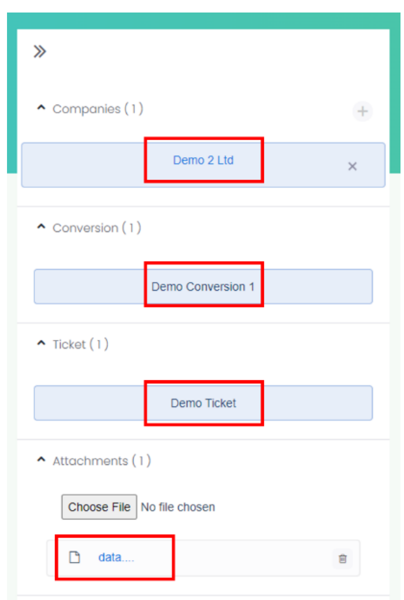
ii. Click on the name of any contact. You will be directed to the contact dashboard.

iii. On the right side of the page, you will find a pane. You can collapse and expand it by clicking on a "Double Arrow" icon.



iv. In this pane, you will find four dropdowns: "Companies", "Conversion", "Ticket", "Attachment". Click on them or the "Arrow" icon beside them to expand to see details about this information corresponding to the contact.

v. Click on the items under "Companies" and "Conversion" to visit company or conversion details. Click on the items under "Attachment" to download it which is elaborated in the step x of "Attachments Add & Delete" segment.

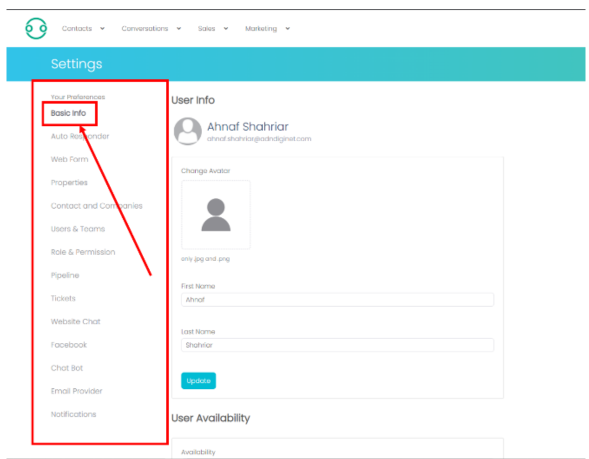


Settings

1. Basic Info

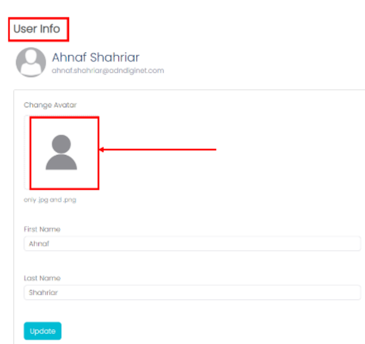
a. On the right side of the “Main Menu Bar”, you will find an “Settings” icon and click on it.

b. In this page, there is a navigation drawer on the left part of the page. The first item of the navigation drawer is “Basic Info”.

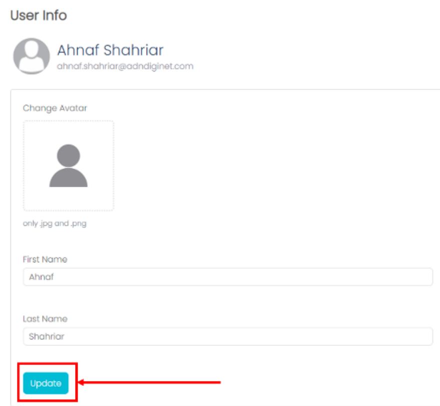


c. In the “Basic Info” Page, you will find all of your information. You can add and edit the information here.

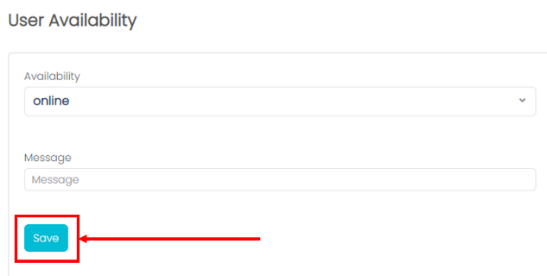
d. In the first card named “User Info”, you can change your “Avatar”, click on the avatar icon. Browse and upload one from your device. This uploaded file must be in either JPG or PNG format.



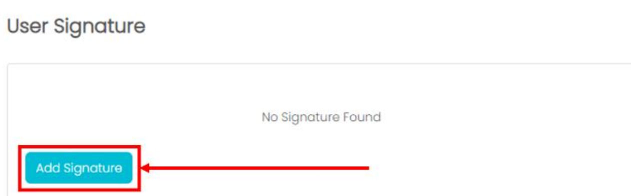
e. You can also change your “First Name” and “Last Name” from the “User Info” card. After editing all the information from the “User Info” card, click the “Update” button below.



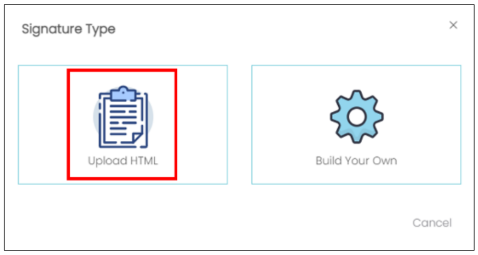
f. In the second card named “User Availability”, you can add/edit your “Availability” and “Message”. After that click on “Save” button.

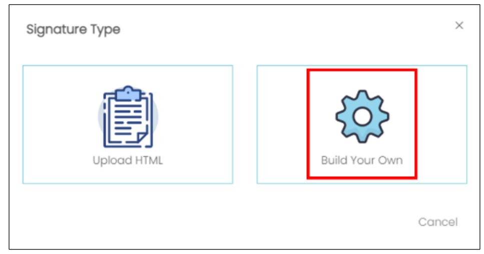


g. The third card is named “User Signature”. You can create your “User Signature” and use it as a card every time without editing it each time. To edit “User Signature”, click on the “Add Signature” or “Modify Signature” button.



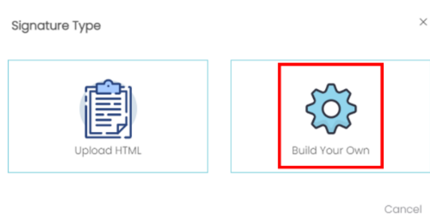
h. After clicking “Modify Signature” or “Add Signature” a popup will appear where you have to select the signature type by clicking on it.



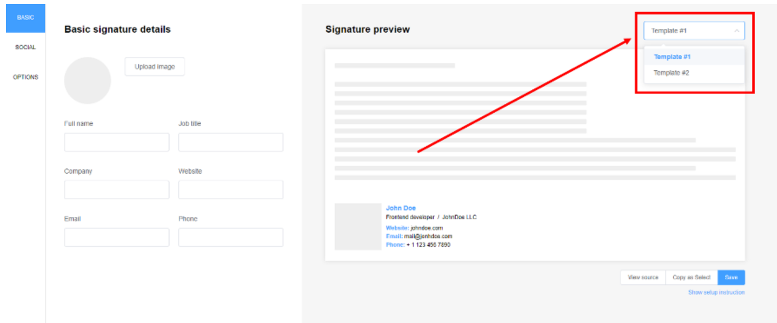


i. If you click on the “Upload HTML” from “Signature Type”, a popup will appear to insert the HTML code in the textbox of your signature. After inserting the code, click on the “Save” button to upload.

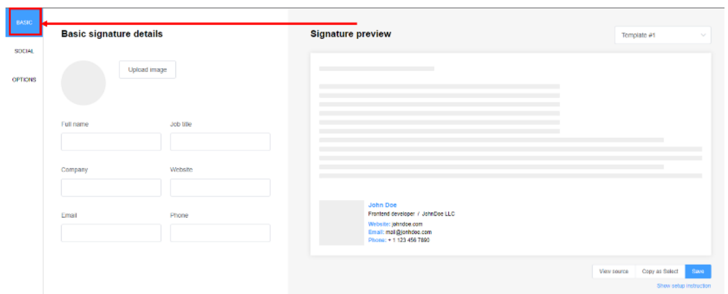
j. If you click on the “Build Your Own” from “Signature Type”, you will be directed to a new page where you can build your signature by using templates.



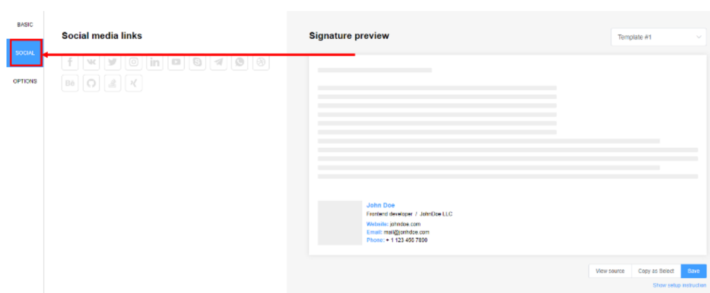
k. At the left most part, there is a navigation drawer with 3 options: “Basic”, “Social”, “Options”. These changes will be viewed on the right part of the page named “Signature preview”. On the top right corner, there is a dropdown to choose a template design.



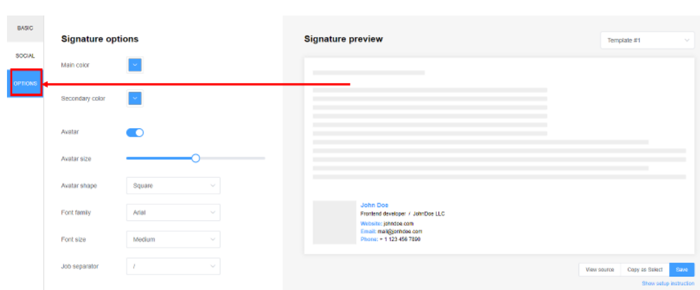
l. Click on the “Basic” button. Here you will find options to edit “Basic signature details”.



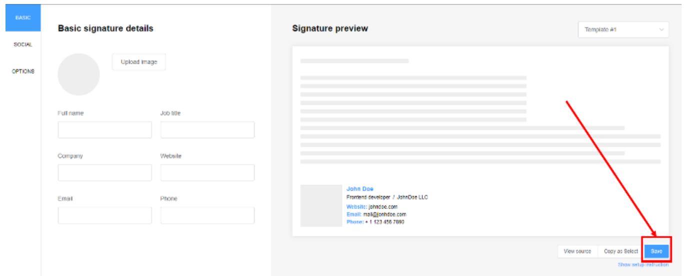
m. Click on the “Social” button. Here you will find options to edit “Social media links”.



n. Click on the “Options” button. Here you will find options for more editing and design materials.



o. After editing, click on the “Save” button from the bottom right corner of the page.

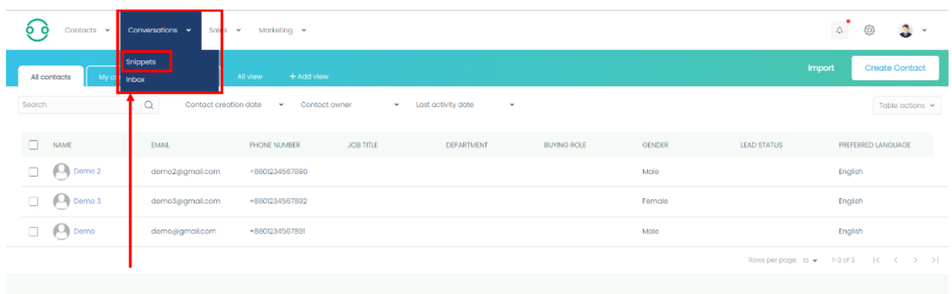


Conversations

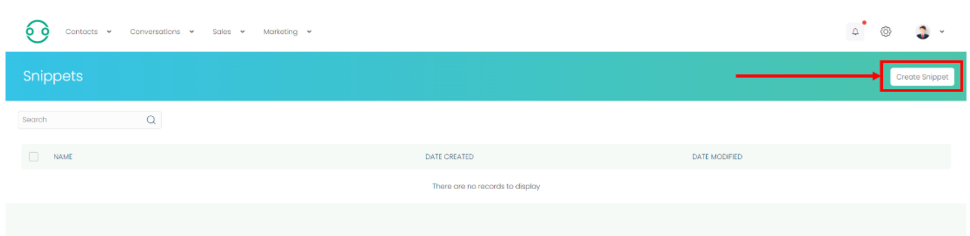
1. Snippets

a. Create, Delete Snippet

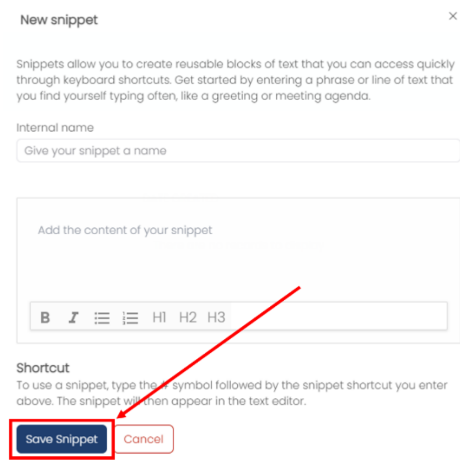
i. Click on “Conversations” from “Main Menu Bar” from dashboard. A dropdown will appear from where you have to click on the “Snippets”.



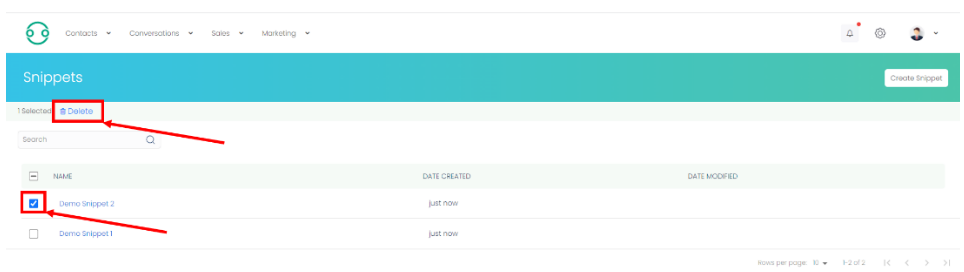
ii. From the right side of the page, click on “Create Snippet”. A new popup will appear.



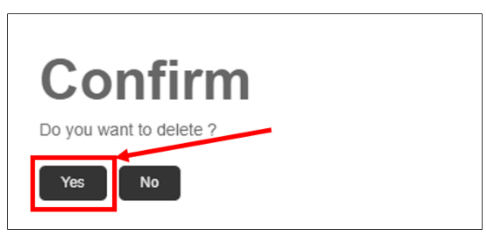
iii. Fill up the fields and click on the “Save Snippet” button bellow from the popup. Edit the snippet content from the options. For detail about editing, follow the “Email” segment.



iv. If you want to delete a snippet, mark the snippet by clicking on the box located on the left side of the snippet name. A new menu will appear above. Click “Delete” from that menu. A new popup will appear for confirmation.

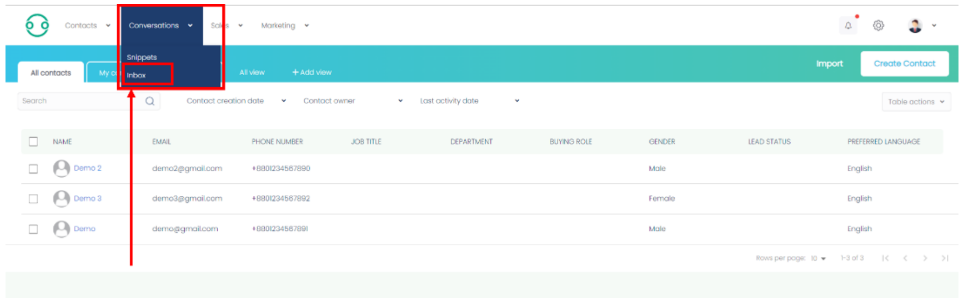


v. If you are determined to delete the snippet, click on “Yes”. Otherwise click on “No”.

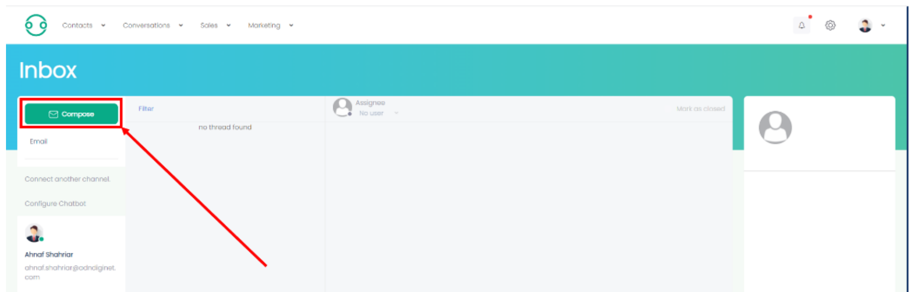


b. Use of Snippet

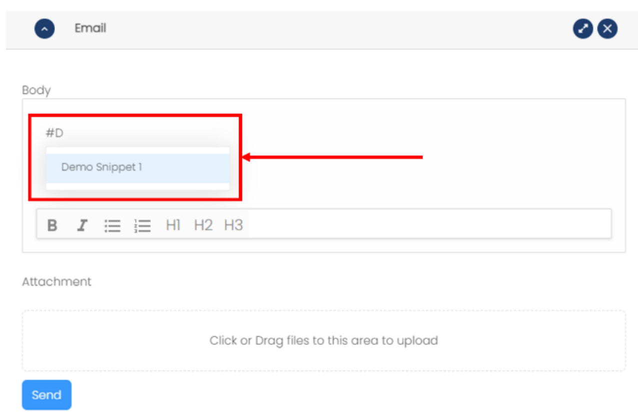
i. Click on “Conversations” from “Main Menu Bar” from dashboard. A dropdown will appear from where you have to click on the “Inbox”.

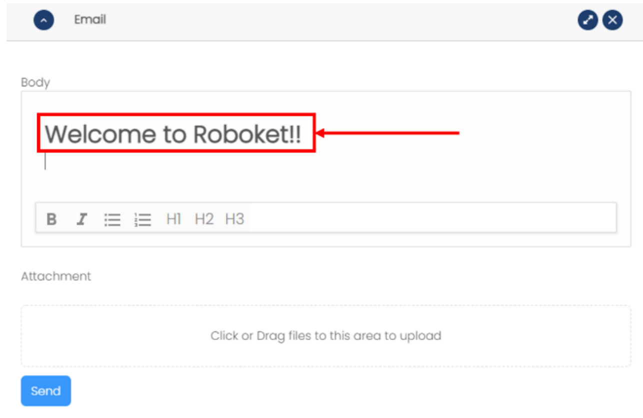


ii. Click on “Compose” from the left drawer of the page. A new popup will appear.



iii. While composing your email in the “Body” of the from the popup, if you write “#” and the first letter of your created snippets, then select your desired snippet from the suggestions. You will get the content of that snippet without writing the whole text.



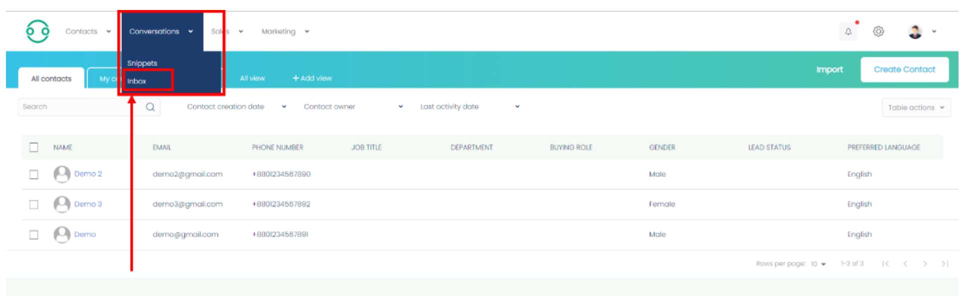


iv. You can edit the snippet text just like other texts by following the instructions of “Email” segment.

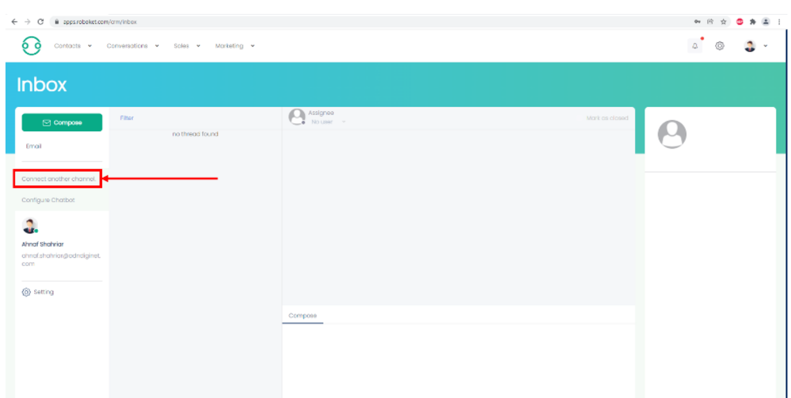
2. Inbox

a. Compose Email

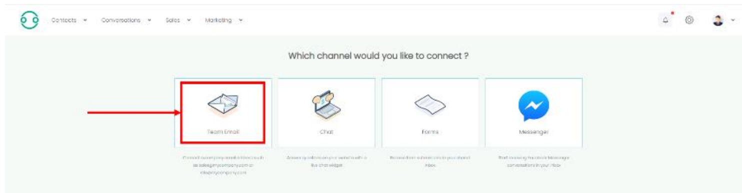
i. Click on “Conversations” from “Main Menu Bar” from dashboard. A dropdown will appear from where you have to click on the “Inbox”.



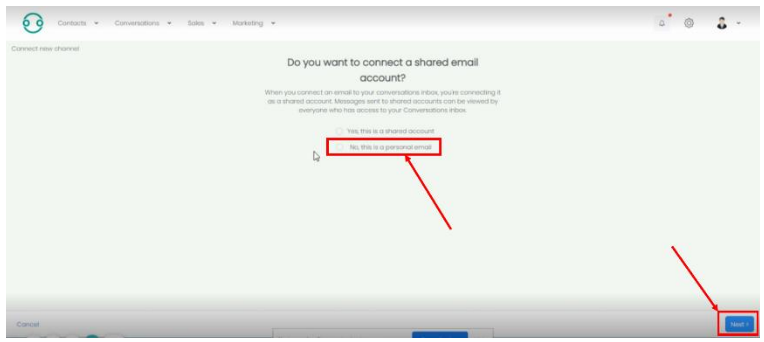
ii. From the left drawer of the page, click on “Connect another channel”.



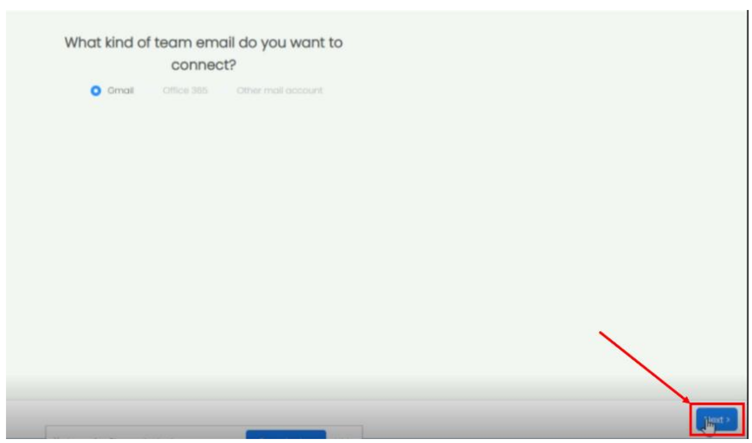
iii. In this page, click on the “Team Email”.



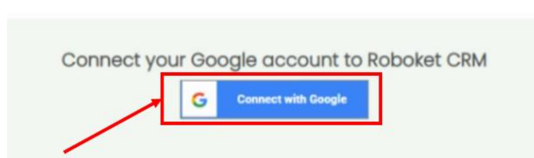
iv. Connect your email account by clicking on the “No, this is a personal email” option, if you already do not have a shared account. Otherwise click on the other option. Then click on “Next”.



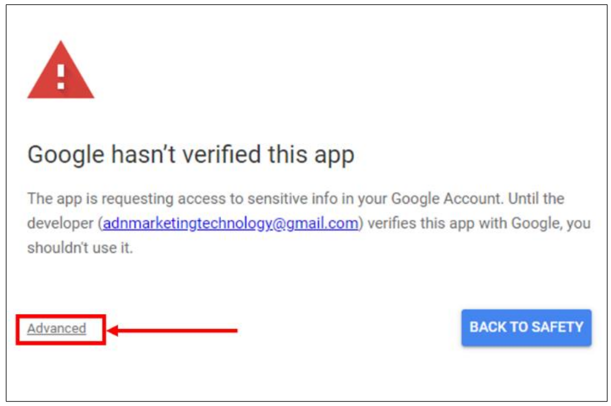
v. By default, you have to choose your Gmail account and click on “Next”.

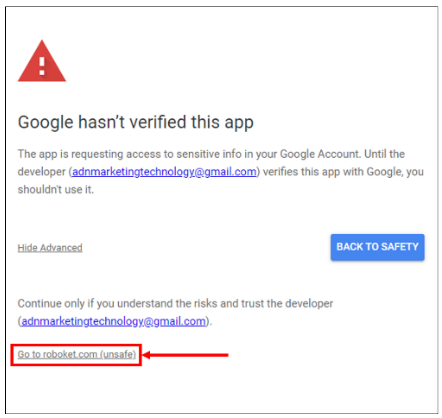


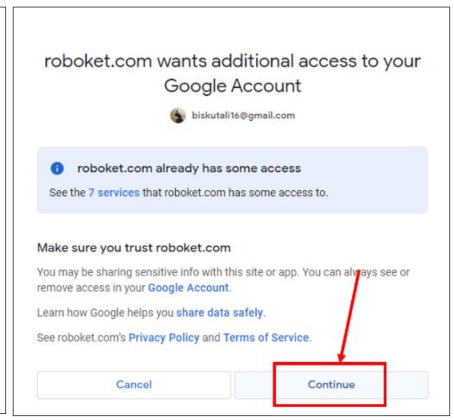
vi. Click on “Connect with Google” account and then connect your google account.



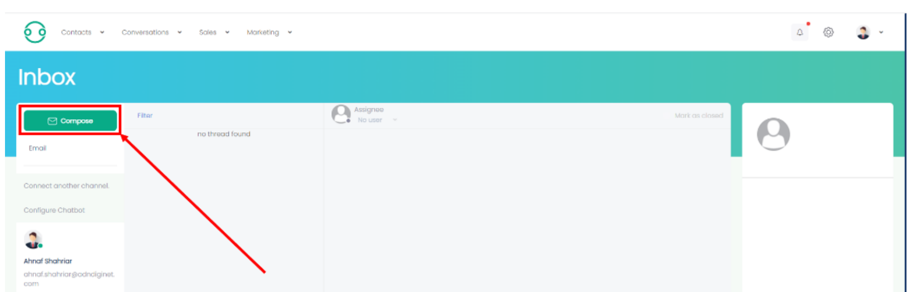
vii. Allow permission for Roboket to your google account. Click on “Advanced” and “Go to roboket.com”. Then click on “Continue”.



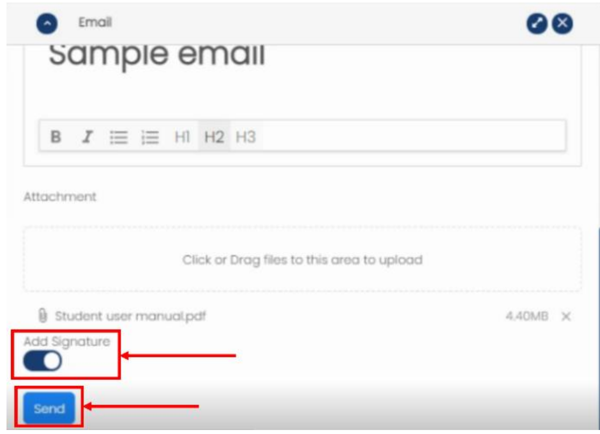




viii. Click on “Compose” from the left drawer of the page. A new popup will appear.



ix. Compose your email and edit from the options. For detail, follow the “Email” and “Attachment” segments. Your signature is by default selected to attach with the email. If you do not want to add signature, click on the button under “Add Signature”. Follow the “Basic Info” segment from “Settings” to customize your signature. After all editing click on the “Send” button.



x. You can check your sent mail from your email account.