Administrator Tools User Guide

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GRAPHIC DIMENSIONS GUIDE

MobileUp Software needs graphics in several specific sizes that represent your organization to complete the initial build of your app for Apple (iOS) and Android users. This guide describes the required sizes and where the images will appear in your app. It also includes instructions on how to organize and submit the graphics to MobileUp Software.

MobileUp manages this process in Smartsheet, an online project management tool. As your team builds and gathers the images for your app, you must enter the information in the Smartsheet created by your MobileUp client services representative. Contact him or her (or you can email our Client Services team at support@mobileupsoftware.com if you don't know who it is) for instructions on accessing your project's Smartsheet.

APP ICONS

1) Please provide a high-resolution image (**1024 x 1024 pixels**) of your organization's logo. This image will be used to create the App Icons for iOS and Android devices, as well as the Action Bar Icon and Notification Icon for Android devices. Below are several examples of how App Icons appear on a phone's home screen.

ACTION ITEMS

- ☐ Save image as: icon-1024.png
- ☐ Place one (1) high resolution image of your organization's logo in the Design Elements row in Smartsheet. (.png file format)

COLOR BRANDING

1) Please provide the color codes you wish to use for your app's branding. If you do not have the color codes readily available, our design team can pull your organization's colors from your current logo or website. Or, consult a reference such as **htmlcolorcodes.com**.

Example: HEX code #FF0000 = Red or RGB code 255,0,0 = Red

Brand Color #1 HEX or RGB	
Brand Color #2 HEX or RGB	
Brand Color #3 HEX or RGB	
Brand Color #4 HEX or RGB	

ACTION ITEMS

- ☐ Please provide the color codes for your organization and place in the Design Elements row in Smartsheet.

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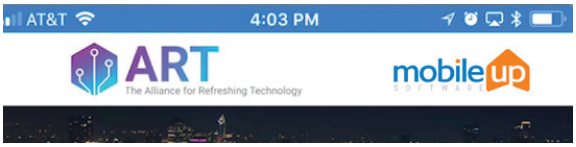
TOP NAVIGATION BAR

1) In addition to the App Icons, iOS devices also have a top navigation bar within the app. If you wish to use something other than your logo and name (or if you wish to use customized branding specific to an event), please provide us with a high-resolution image that is **1280 x 160 pixels**. An example of the top navigation bar (including sponsorship placement in the form of the MobileUp logo) is below.

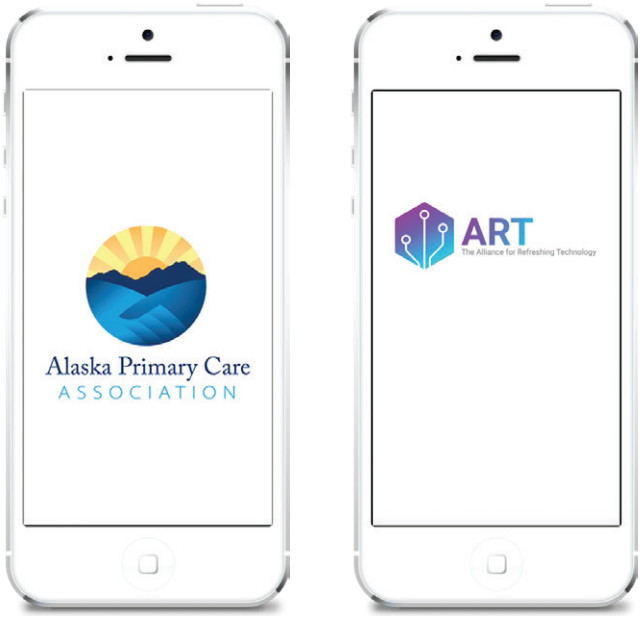


ACTION ITEMS

- ☐ Save image as: ios-header-image-1280x160.png
- ☐ Please place one (1) high resolution image of your choosing within the Design Elements row in Smartsheet.

LAUNCH IMAGE

1) iOS devices allow for a Launch Image to appear when loading your organization's app. If you wish to have the Launch Image be the same as the Home Screen Image, you do not need to provide us with any additional images. However, if you wish to have a different Launch Image, you will need to provide us with a high-resolution image that is **1242 x 2208 pixels**. Examples of Launch Images are below:



ACTION ITEMS

- ☐ Save image as: ios-launch-image-1242x2208.png
- ☐ Please place one (1) high resolution image of your choosing within the Design Elements row in Smartsheet.

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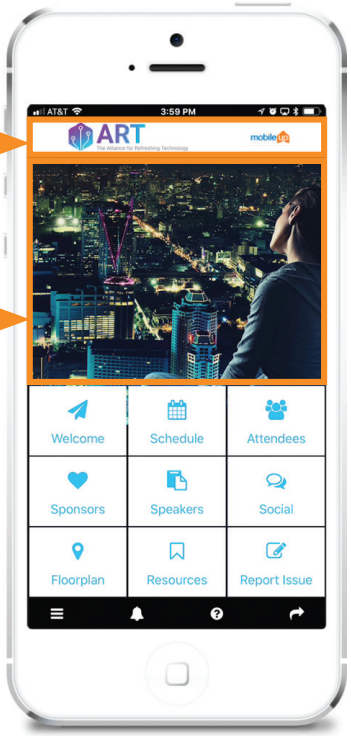
HOME SCREEN IMAGE

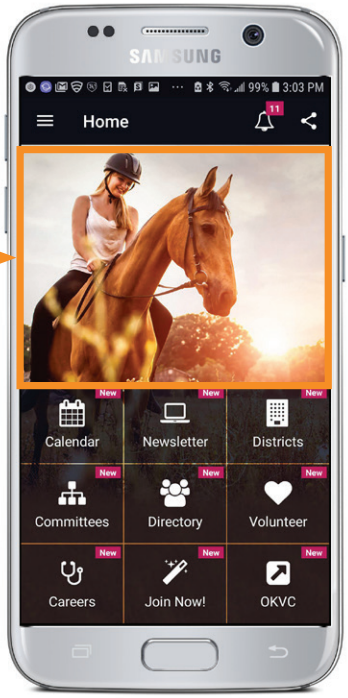
1) For your app's Home Screen Image, we need you to provide us with high-resolution images in the following sizes: **1242 x 2208 pixels** and **1080 x 1620 pixels**. If you do not wish to have a Home Screen Image branded specifically to your organization or a specific conference or event, our design team can use your logo to create a background. Below are several examples of Home Screen Images:

TOP NAVIGATION BAR (The MobileUp logo is an example of sponsorship placement)

iOS HOME SCREEN IMAGE



ANDROID HOME SCREEN IMAGE



ACTION ITEMS

- ☐ Save iOS image as: ios-hero-image-1242x2208.png
- ☐ Save Android image as: android-hero-image-1080x1620.png
- ☐ Please place the high-resolution images you wish to use for your Home Screen Image in the Design Elements row in Smartsheet.

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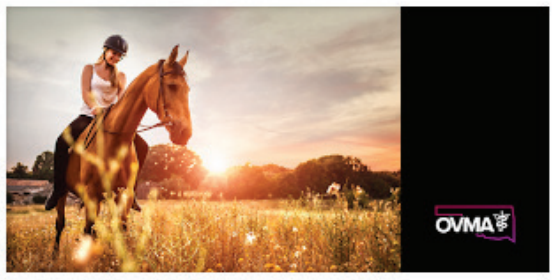
ANDROID FEATURE GRAPHIC

1) Your app will be available for download from the Google Play Store for Android users. Your app's Google Play Store Feature Graphic needs to be **1024 x 500 pixels**. Below are several examples of Feature Graphics:



ACTION ITEMS

- ☐ Save image as: play-store-feature-1024x500.png
- ☐ Please place the high-resolution image you wish to use for your Feature Graphic in the Design Elements row in Smartsheet.

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ANDROID LEFT HEADER

1) For your Android app's Left Header Image, you will need to provide us with a high-resolution image (**640 x 360 pixels**). Below are examples of Left Header Images:

ACTION ITEMS

- ☐ Save image as: android-left-nav-header-640x360.png
- ☐ Please place the high-resolution image you wish to use for your Left Header Image in the Design Elements row in Smartsheet.

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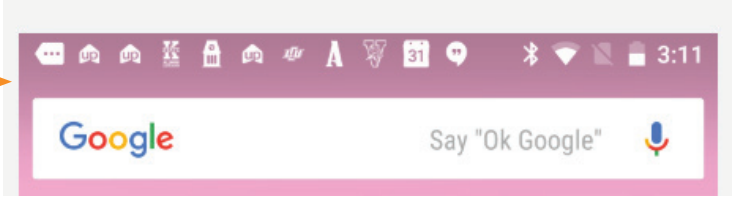
NOTIFICATION ICONS

1) For your Android app's push notification announcements, you will need to provide us with a high-resolution image (**1024 x 1024 pixels**). The image must be white only with a transparent background. Below are several examples of Notification Icon images:

NOTIFICATION ICONS



ACTION ITEMS

- ☐ Save image as: icon-1024-white.png
- ☐ Please place the high-resolution image you wish to use for your Notification Icon Image in the Design Elements row in Smartsheet.

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MANAGE HOME SCREEN

Customize the appearance of your app's home screen and publish it instantly. Promote app features and important events with your own images. Ensure your app meets branding and color guidelines.

OVERVIEW

1) **What it does:** The Manage Home Screen section of our Administrator Tools provides powerful functionality for customizing the look and feel of your app at any time.

2) **What it doesn't do:** These tools strictly affect the cosmetic appearance of your app. They interact with other part of your app such as **Roles** and **Features**. However, they do not create or manage these features. This functionality is addressed in other parts of our Administrator Tools.

3) **Friendly warning:** We recommend you read through this document and become familiar with the start-to-finish process of customizing your home screen before beginning. Please note that when you publish your updates, your changes are automatically pushed to your app users so you will want to be sure your design is complete before doing so. (See the **Saving and Drafts** section for more information.)

4) **A suggested/general workflow:**

- Familiarize yourself with the six available home screen **Styles** and select one as your targeted design.
- Get organized. Gather any images your new design will require before you enter the design process in the Administrator Tools. Also, know what **Features** (aka **Tiles**) of your app will be on the home screen and determine the images, icons, and/or labels you will use for each **Feature** as required by the target design you choose.
- Access the **Manage Home Screen** tools and create your new design according to the instructions in this guide.
- Use the home screen emulator to test the appearance each of your user **Roles** will experience in the new design often and make appropriate changes.
- Be sure to **Save Drafts** if you need to stop and come back to your revised design later.
- After you are done designing and testing, push your finished design to your users instantly with a click of a button.

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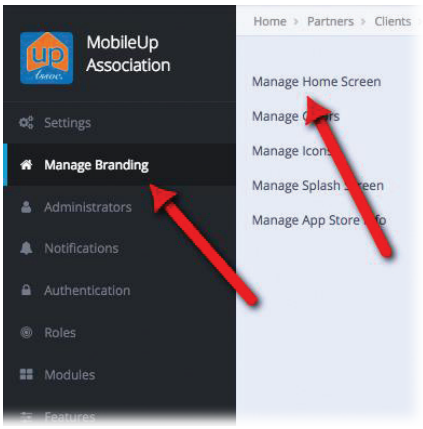
GETTING STARTED

1) Sign into the MobileUp Administrator Tools.

2) Click the **Manage Branding** link from the left navigation bar.

Note: The **Manage Branding** tools are not available to every MobileUp administrator. If you don't see this link, contact **support@mobileupsoftware.com** and request access to these tools.

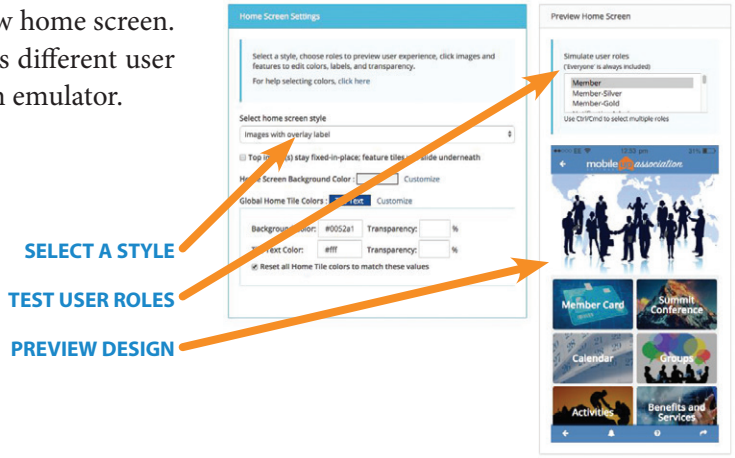
3) Click the **Manage Home Screen** link.



4) There are three sections in the **Manage Home Screen** section. You can access the sections in any order by clicking on their tabs, but we recommend you follow them in sequence from left to right as you build your app's new home page design.

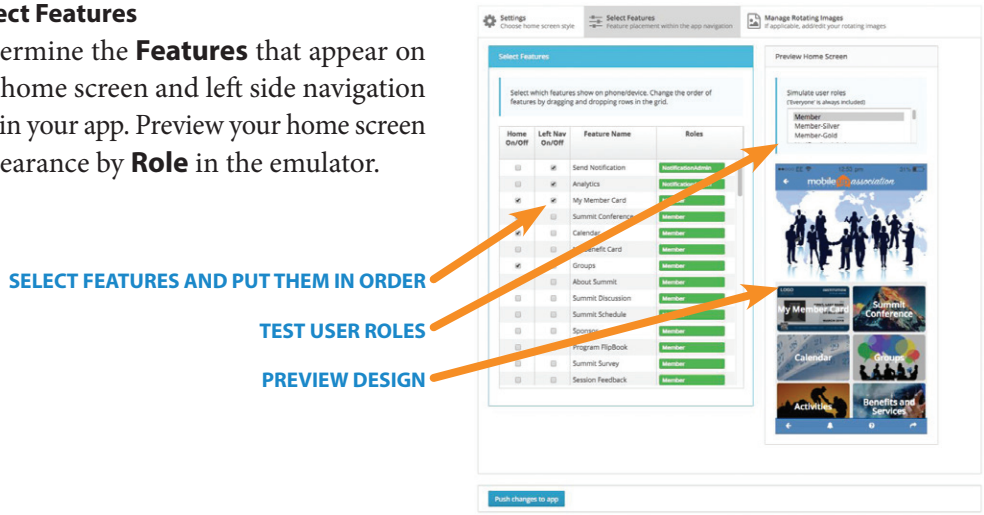
1 Settings

Select a style for your new home screen. Test its appearance across different user **Roles** in the home screen emulator.



2 Select Features

Determine the **Features** that appear on the home screen and left side navigation bar in your app. Preview your home screen appearance by **Role** in the emulator.



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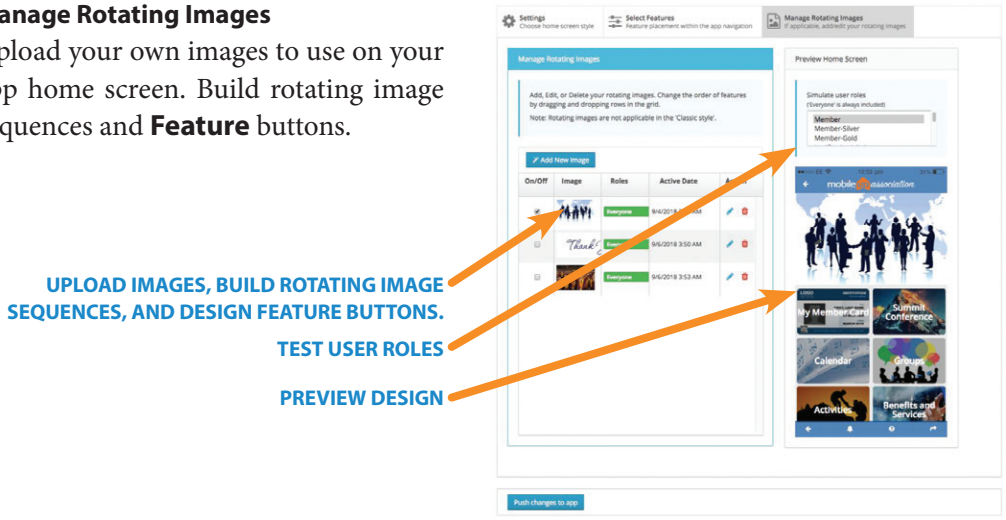
GETTING STARTED (CONTINUED)

3 Manage Rotating Images

Upload your own images to use on your app home screen. Build rotating image sequences and **Feature** buttons.



SETTINGS: VISUALIZING ROLES

1) Click on the **Settings** tab.

2) In the **Preview Home Screen** section, your app's **Roles** are listed in the top selection box.

3) Click one or multiple **Roles** and the home screen emulator will change to reflect what users with the selected **Role** will see on their home screen when you publish your new home page design.

Notes: The home screen emulator shows how your new design looks on Apple (iOS) devices. Android previews are not available at this time. Also, the **Role** of Everyone is always applied on the home screen emulator.

In these examples, the home screen emulator on the left shows that a user with the role of Member sees many different features while an Unknown role (new user) on the right sees only the login feature.

See the Select Features section to learn how to adjust the visible features on the home screen by user Roles.

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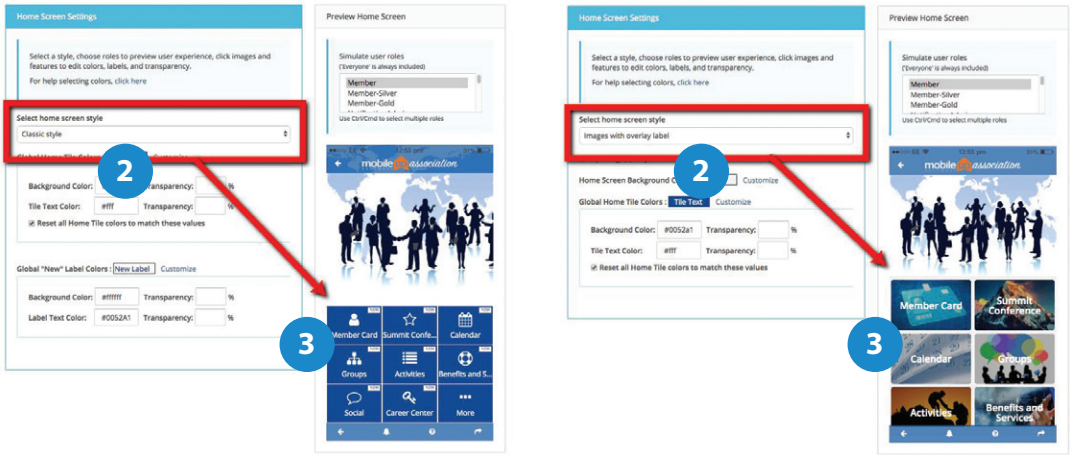
SETTINGS: STYLES

1) Click on the **Settings** tab.

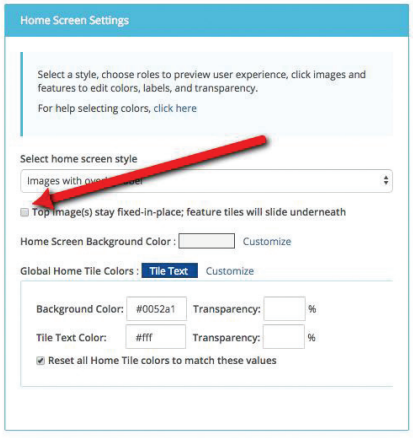
2) In the **Home Screen Settings** section, choose an option from the **Select home screen style** dropdown box for your home screen design.

3) The home screen emulator shows how your home screen appears with the selected design style.



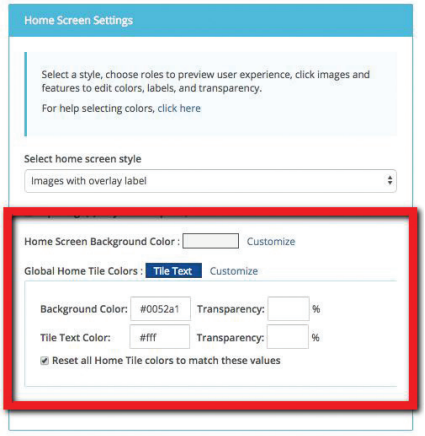
Style settings such as colors and transparency carry over from one design to the next when they are changed. Be sure to visually inspect your design for readability and contrast as you test new designs.

4) For designs with scrolling Features, fix the main hero image or rotating images to the top of the screen by selecting the ..... checkbox.



5) Adjusting Colors and Transparencies: The home screen background, button bars, labels, and backgrounds, and icons can be set to any color and transparency combination. Access the settings by clicking the "Customize" links. Colors are set with hexidecimal numbers. (See https://htmlcolorcodes.com for a reference). Adjust transparency by clicking the counter up and down or entering a number from 1 to 100.

Note adjustments can be made on a single object or on a global basis as noted by the "Global" label where one change affects all objects of that type in your app.



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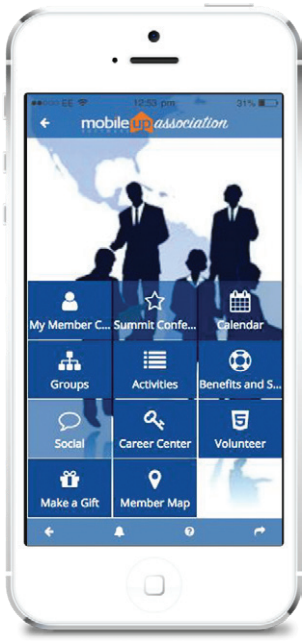
SETTINGS: STYLES (CONTINUED)

6) Here is an overview of the available home screen styles:

Classic Style

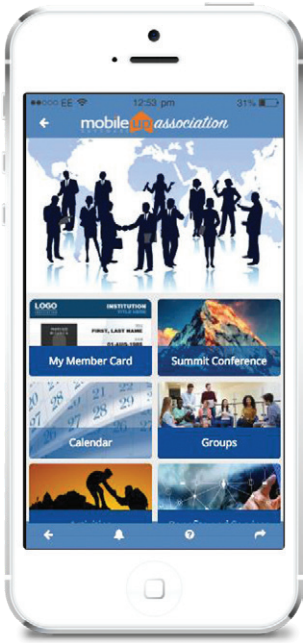
Notes: This is the standard design with Tiles and icons that MobileUp apps have used since the platform was created. Adjust each label's background, text color, and transparency. Edit a Feature's name as needed. The image (1024x620) is a fixed asset but can be replaced.

Classic Style with Rotating Images



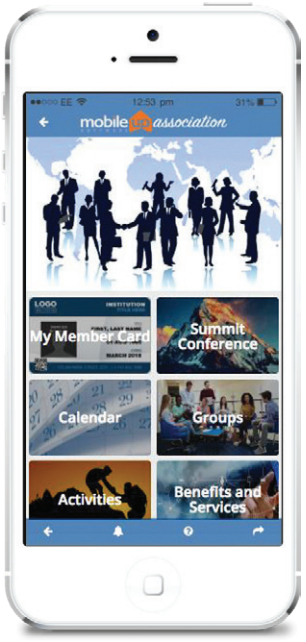
Notes: A vertical image (1024x1820) that can be role-based and rotate displays behind the Features. The "More" tile doesn't exist in this design so Tiles will cover more of the background image as they are added. Adjust each label's background, text color, and transparency. Edit a Feature's name and icon as needed.

Images with Styled Bar



Notes: Upload your own images. Top can be a single image or rotating images. Each label has adjustable colors and transparency. Users scroll up to see Features below screen level. Recommended image sizes: 1024x620 for the top and 450x266 for Features.

Images with Overlay Label



Notes: Upload your own images. Top can be a single image or rotating images. Adjust a label's text color and transparency. Users scroll up to see Features below screen level. Recommended image sizes: 1024x620 for the top and 450x266 for Features.

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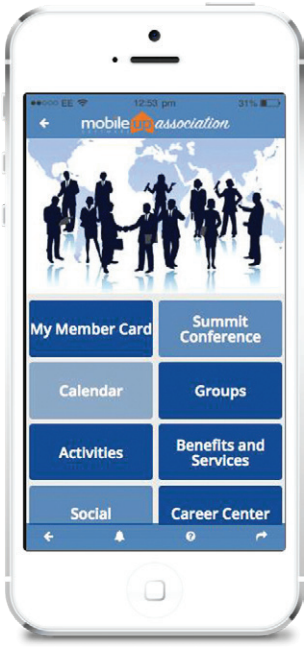
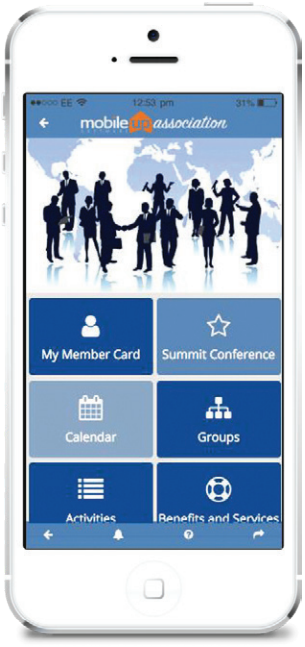
SETTINGS: STYLES (CONTINUED)

Colors with Overlay Label



Notes: Upload your own image(s) for the top, which can be one or rotating images (1024x620 pixels). Adjust each label's background and text colors. Edit a Feature's name as needed. Users scroll up to see Features below screen level.

Colors with Overlay Icons



Notes: Upload your own image(s) for the top, which can be one or rotating images (1024x620 pixels). Adjust each label's background and text colors. Edit a Feature's name and icon as needed. Users scroll up to see Features below screen level.

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SELECT FEATURES

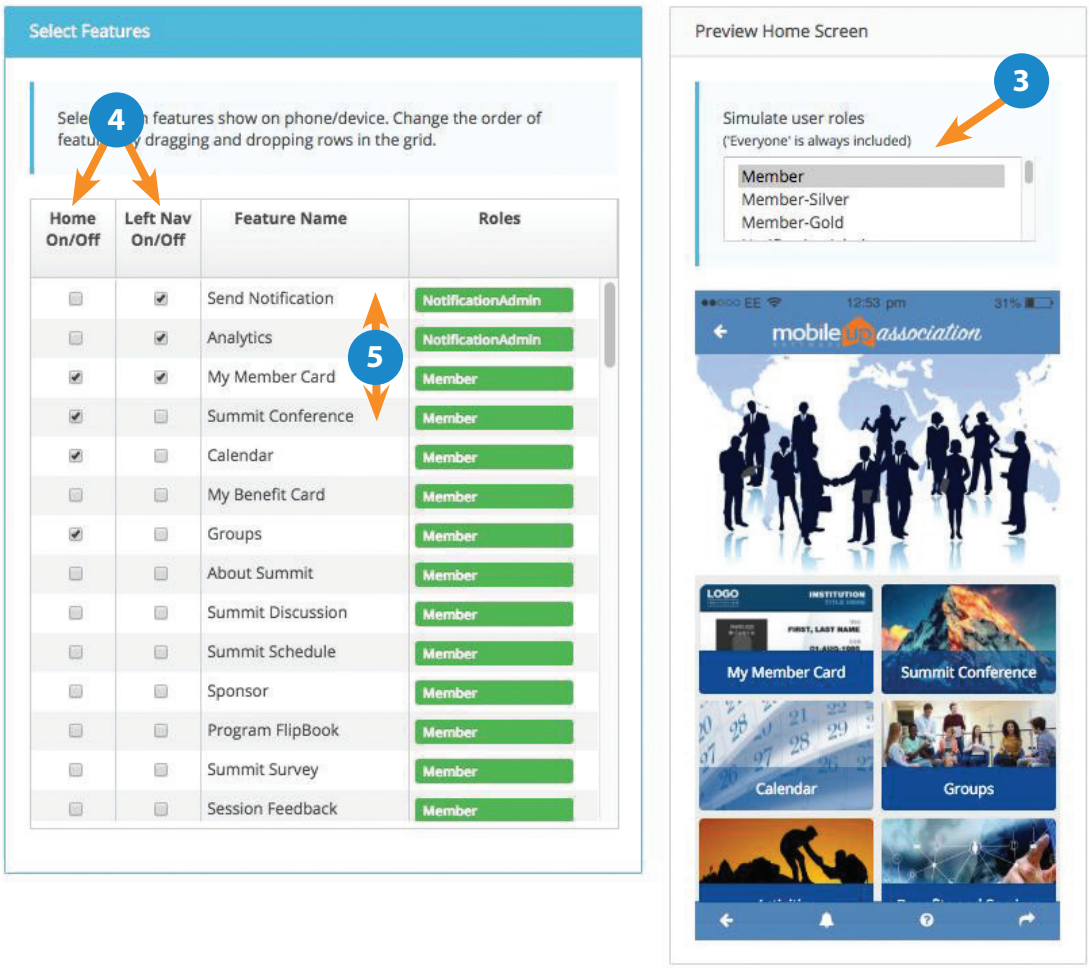
1) Click on the **Select Features** tab.

2) In the **Select Features** section, there is a listing of **Features** and **Roles** that have been previously built in their respective areas of the MobileUp Administrator Tools. (**Features** and **Roles** are not created or modified in the **Manage Home Screen** section of the tools. Contact **support@mobileupsoftware.com** if you need assistance in these areas.)

3) Select a single or multiple (shift+click) **Roles** in the **Preview Home Screen** section.

4) For the **Role(s)** you selected, set the visibility of each **Feature** on the home screen and the left navigation area of your app by checking or unchecking the appropriate boxes.

5) Re-arrange the order of the **Features** on your home screen by clicking and dragging the rows up and down. Feature rows on the top of the list appear first on your home screen.



Keep the design parameters of your selected home screen design in mind when selecting visibility of features. For example, visible Features on the home screen of the "Classic style with rotating images" design might cover your background image. See the Settings: Styles section of this document for more information.

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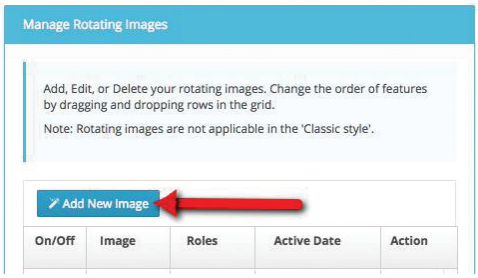
MANAGE ROTATING IMAGES

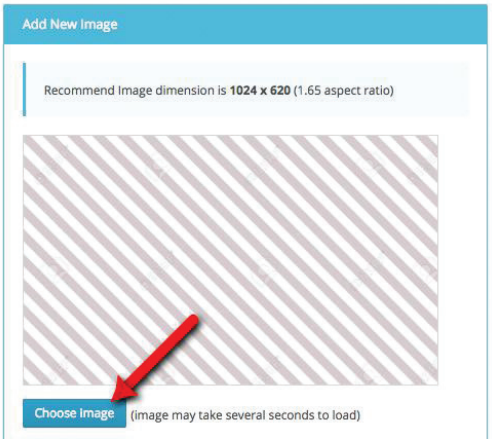
1) Click on the **Manage Rotating Images** tab.

2) In the **Manage Rotating Images** section of this tab, you can control the appearance of the main image area for each design.

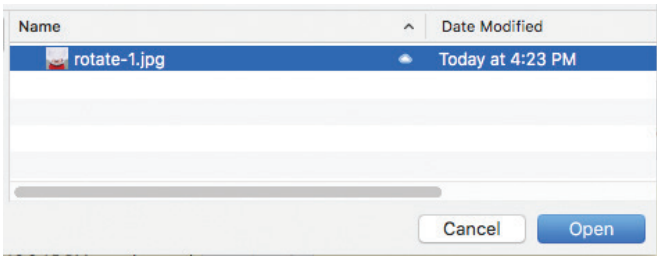
> **The "Classic style" design doesn't have a Rotating Images option. The image at the top of this design (aka "hero image") was created during the app's creation by the MobileUp Client Services team. Contact support@mobileupsoftware.com for assistance in updating the hero image for this particular design if desired.**

3) Click the **Add New Image** button then the **Choose Image** button.





4) Select an image (recommended size is 1024x620 pixels in PNG, JPG, or GIF format) from your computer and select **Open** to upload.



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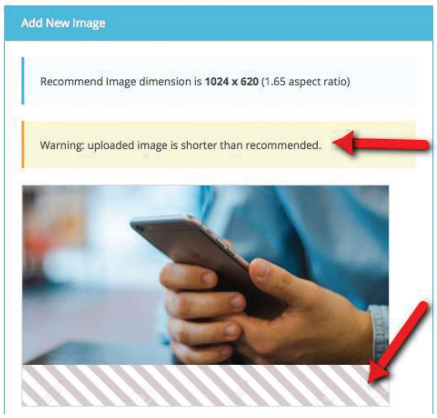
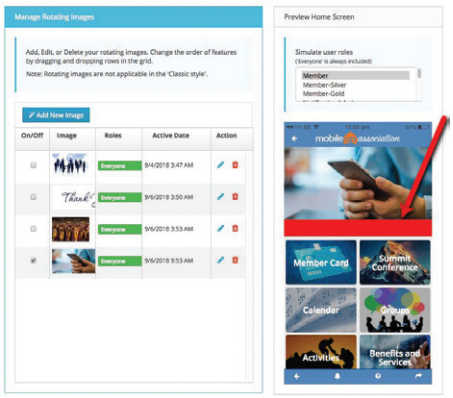
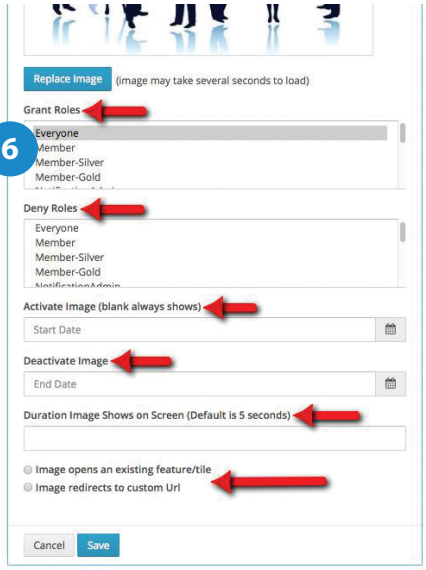
MANAGE IMAGES: MANAGE ROTATING IMAGES (CONTINUED)

5) After the image loads, images that cannot be resized proportionally to fit the designated area will prompt a warning about extra space. You can repeat the process with another image with the recommended size or aspect ratio (1.65) or accept that there will be empty space in your app. For the latter choice, saving the undersized image will cause the preview to display the empty space as red. If pushed to the app, the empty space will show as a gap on users' devices.





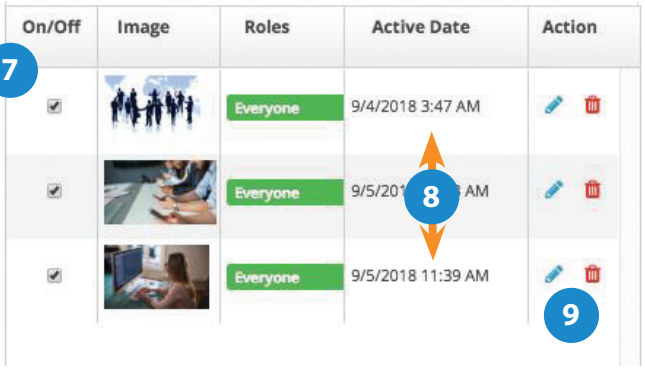
6) For your uploaded image, select which **Roles** should and shouldn't see the image. You can also set active dates, durations for each image to appear before cycling off the screen to the next one, and what feature or external URL a tap on the image should load in your app.



7) Turn the checkbox on to include an image in the rotation. Turn the checkbox off to remove it from the rotation.

8) Drag the image rows up and down to change the appearance order of the images in the rotation.

9) Edit the image settings by clicking on the blue pencil icon or delete it by clicking on the red trash can icon.



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MANAGING FEATURE (TILE) IMAGES AND COLORS

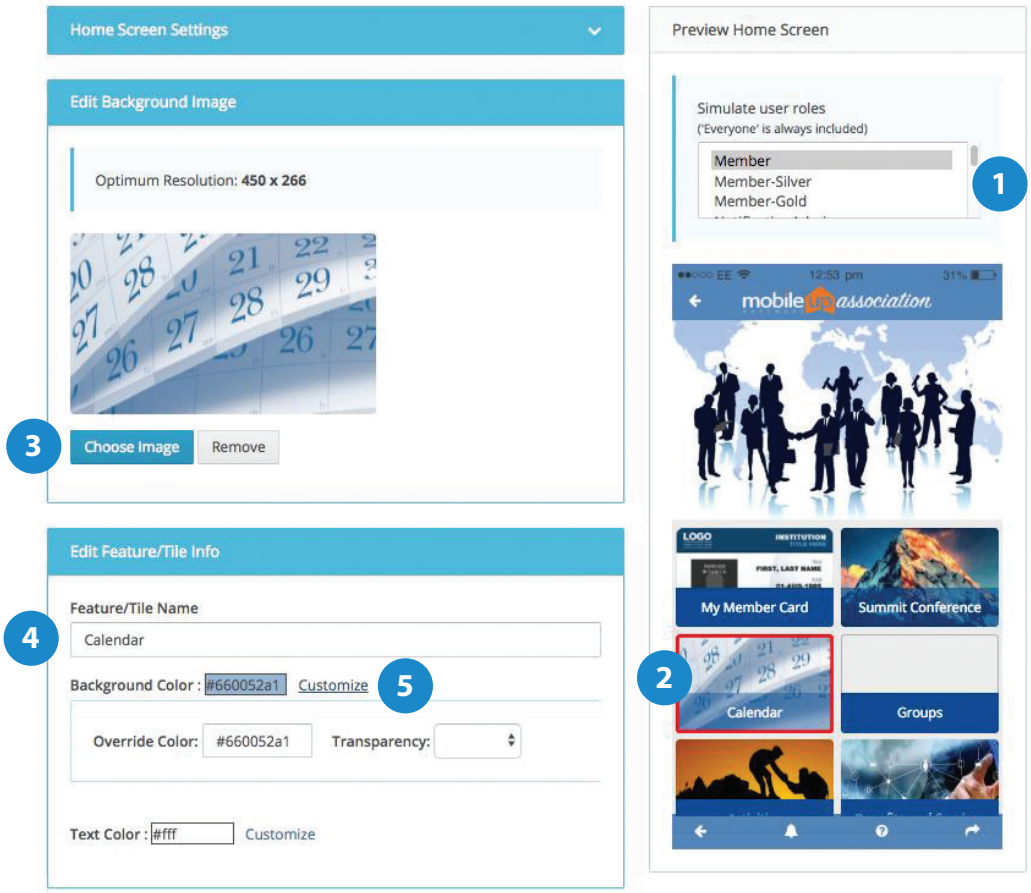
1) In the **Preview Home Screen** section, select a **Role** to show the available **Features** (aka **Tiles**) on the home screen emulator for those users.

2) Click on a **Feature** in the emulator. (A selected **Feature** will have a red border around it.)

3) Click the **Choose Image** button in the **Edit Background Image** section to upload an image for your **Feature**. The recommended dimensions are 450x266 pixels for **Feature** images. Note: Your uploaded image will be stretched and possibly distorted to cover the **Feature** area if your supplied image doesn't match the recommended ratio.

4) In the **Edit Feature/Tile Info** section, you can edit the Feature name, which is also the label on the Tile.

5) Click the "Customize" links to adjust the text and background colors using hexidecimal formats. (See https://htmlcolorcodes.com for a handy reference.) You can also adjust the transparency of each element. Verify your changes in the home screen emulator before saving them to be sure you have enough contrast between your text and images that the words can be clearly seen and read.



TIP: When using the home screen design options that have labels over images, there are times when you might want just the image to be present with no words. In those instances, click Customize and set the Transparency options on your text and label to 100% so that it is invisible.

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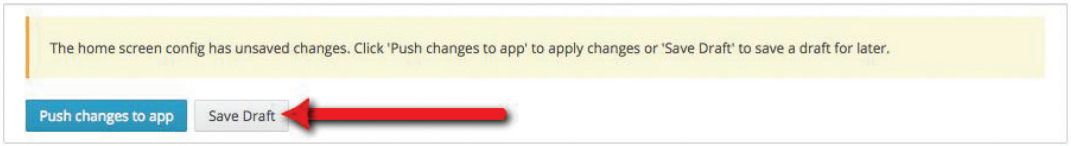
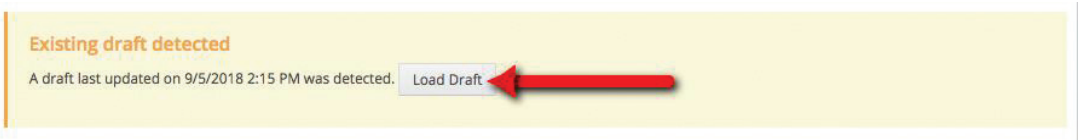
SAVING AND DRAFTS

1) When you make the first change to a home screen design, a **Save Draft** button will appear at the bottom of the page.



2) Click the **Save Draft** button to save your changes. You can now leave the administrator tools and return at a later time.

3) When you return, click the **Load Draft** button to pick up where you left your design in the previous step.



Failure to follow these steps may lead to lost work if you must complete your home screen design across multiple sessions.

Coordinate your efforts with other administrators on your team. Only one person should edit the home screen design at a time to avoid one person saving changes over another's.

PUSHING CHANGES TO YOUR APP

1) A **Push changes to app** button is located at the bottom of each page.

2) Click the **Push changes to app** button after you have completed and tested your new home screen design in the home screen emulator.

3) The new home screen design will appear on your users' apps after a one-hour caching time has elapsed or after the app is refreshed manually by a user.

To emphasize: This is an almost immediate app design change across your user base. Be sure your design is tested across all Roles before clicking the "Push changes to app" button.

HOME SCREEN DESIGN SERVICES

If you like the new home screen designs but don't have the time or desire to use these tools, we can do the work for you. Please contact us at **support@mobileupsoftware.com** for information and pricing on this service.

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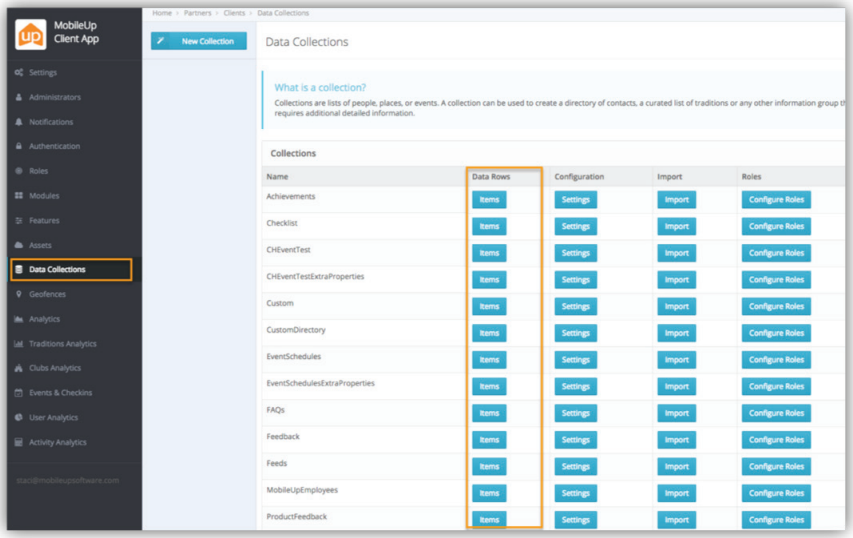
DATA COLLECTIONS

Data collections are lists of people, places, or events in the MobileUp system. Learn how to work with this data through the Items and Settings configurations.

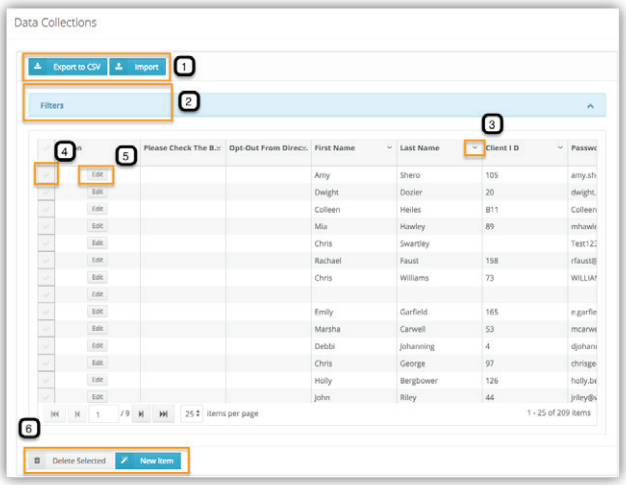
ITEMS

1) Begin by navigating to **Data Collections** in the left-hand menu. Click **Items** to go into a specific collection where data is stored.



2) Once you are in the data collection you have multiple options:

1. **Export to CSV** (exports all data in the collection) or **Import** (see the Importing Data section for information.)
2. **Filters** allows you to locate data by any column header value.
3. **Sort Options:** Ascending, Descending, Hide Column, Pin Left or Pin Right.
4. **Select** a record.
5. **Edit** a record.
6. **Delete Selected** or add a **New Item**.



Please use caution when modifying settings in a data collection.

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EDITING RECORDS

1) Click the **Edit** button on a row to be view that record's details.

Tip: Use the membership data collection to troubleshoot login issues! Use the filters to find the member record and click **Edit** to view all information on the record. You can provide the user with the required login information (email, ID, password etc.) or you can edit it if it has changed.

2) Remember to **Save**. This will return you to the data collection.

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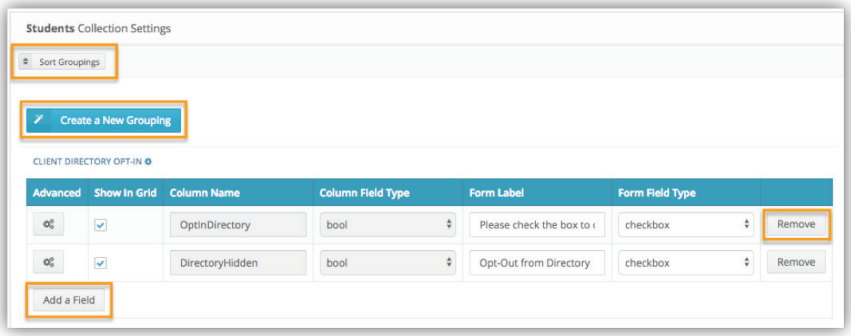
SETTINGS

1) Each Column Header in your data is displayed and created as a field in the Settings section of the data collection.

2) Fields can be grouped by category.

3) You can **Add a Field** to an existing grouping or **Create a New Grouping**. You can also **Remove** fields from the data collection.

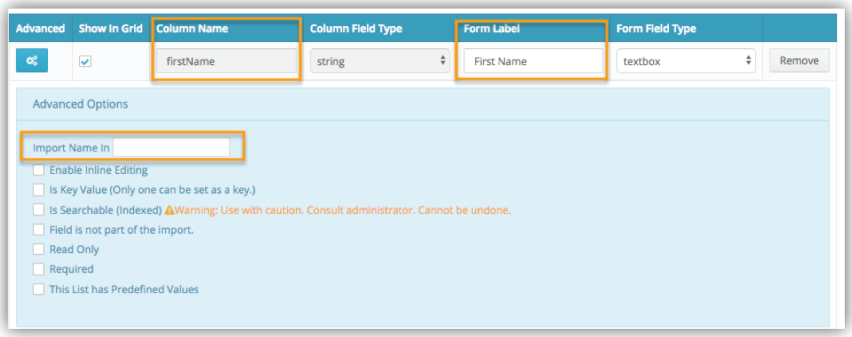
4) The order in which fields are displayed can be sorted using the **Sort Groupings** feature.



FIELD NAME

1) Each data field has a **Column Name** and **Form Label**.

- **Column Name:** It cannot contain spaces or special characters. This name will appear as a column header in the data import unless an import name is specified.
- **Form Label:** This is the "friendly" name. This is the field used in the app and administrator tools as well as the header when you manually add data records to the collection.



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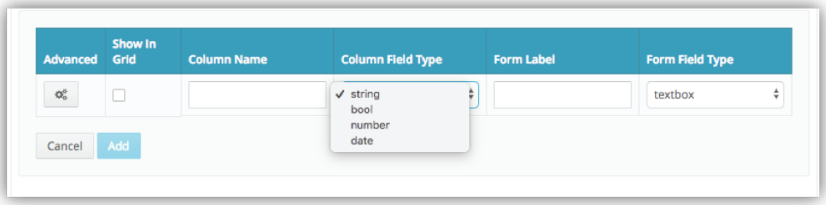
COLUMN FIELD TYPE

1) The column field type will differ depending on the type of data.

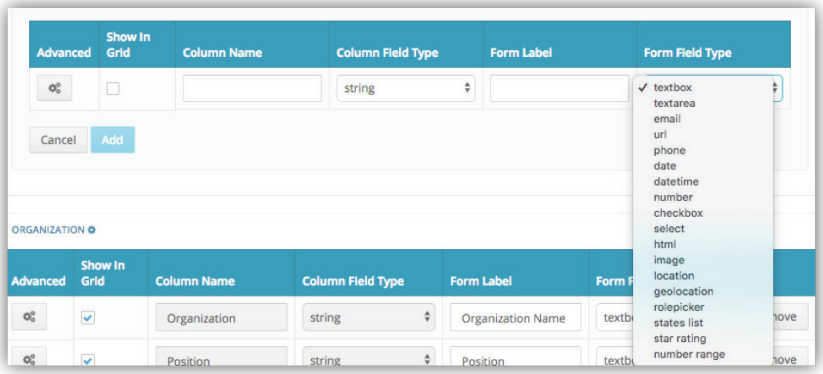
- **String:** Use for text.
- **Bool:** Use for a check box.
- **Number** and **Date:** Use when applicable.



FORM FIELD TYPE

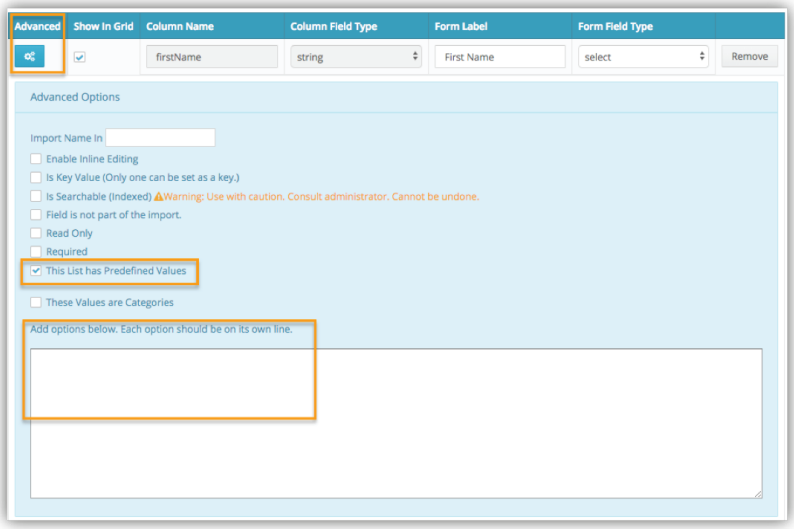
1) Select the **Form Field Type** most appropriate for the type of data you will be loading.

NOTE: Selecting the correct type allows your data to function appropriately in the app. For example, a phone number in the directory will not be clickable unless it has been designated as "phone" in the field type.



ADVANCED

1) **Select** allows you to create a drop down or scrollable menu. To add the menu options, click **Advanced**, and select **This List has Predefined Values**.



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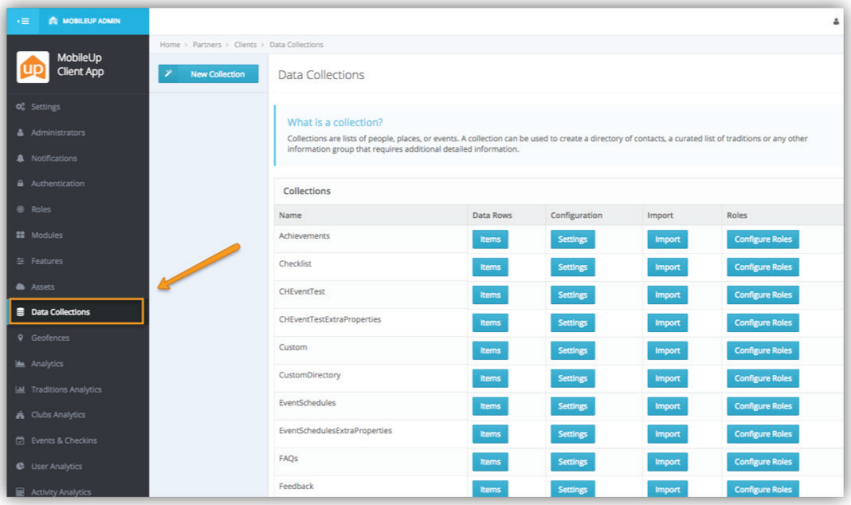
IMPORTING DATA

Learn how to organize and format membership and other data for inclusion in the MobileUp system by following these steps.

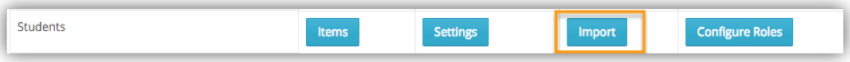
ACCESSING DATA COLLECTIONS

1) After you have logged into your MobileUp administrator tools, you can access the Data Collections section from the left-hand navigation. From here, you will have the ability to import data into your Data Collections.



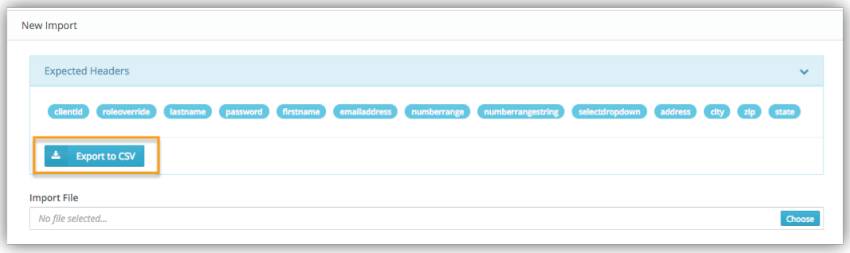
IMPORT PAGE

1) On the Collections page, you can access the Import tool by clicking on the **Import** button for the appropriate collection.



CREATING IMPORT FILE

1) If you are unsure of the column headers, you can export the Data Collection's template by clicking the blue **Expected Headers** bar then click the **Export to CSV** button.



2) A comma separated file ("csv") file will be downloaded that contains the collection's column headers.

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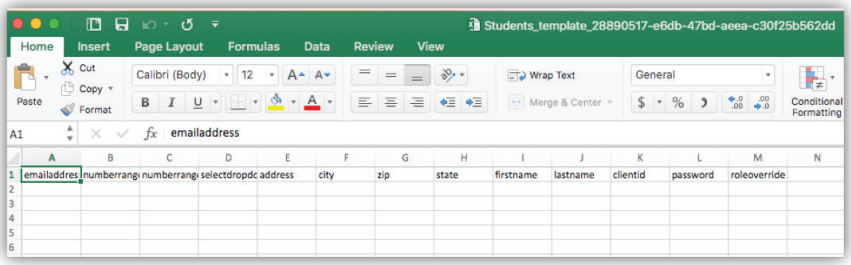


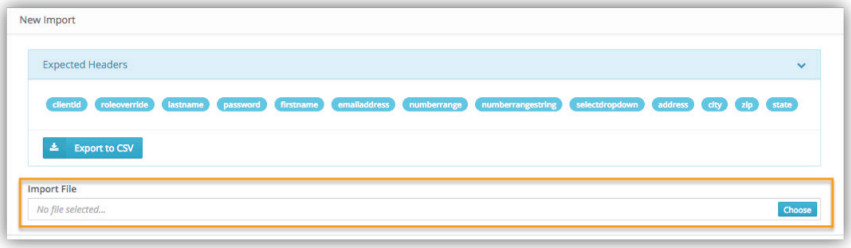
3) Populate the csv with your data matching the column headers. Be sure to save the file as a csv. Our system will only import files that have the ".csv" file extension.

New or Existing Member Records? The KEY VALUE (usually clientid or memberid) is the field that determines whether a new record will be created. If you are updating an existing member record, the system will update the record with the matching key value. If a matching key value does not exist, a new record will be created. This is how the system allows record updates without creating duplicate records.

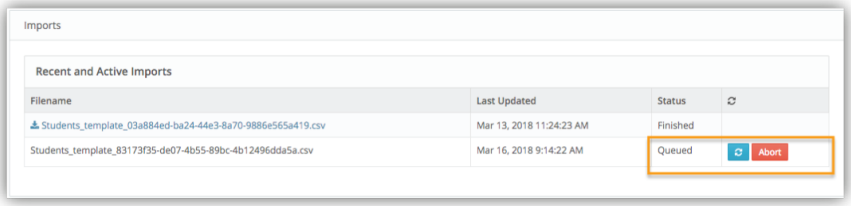
Please contact your account manager or **support@mobileupsoftware.com** if you are unsure which field is your KEY VALUE.

Note: Excel tends to strip out leading zeros from data files so it is important that you reformat your member ID with leading zeros before you save and close the file.

4) Once you have formatted your data file, click the **Choose** button and select the appropriate file from your computer.



5) Your import will appear in **Recent and Active Imports**. The data file processes automatically but could take anywhere from a few minutes to hours, depending on the size of the file. You will see **Queued**, **In Progress**, or **Finished** under the **Status** column.



6) You also can **Abort** the import before it is complete.

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CREATING AND MANAGING TILES

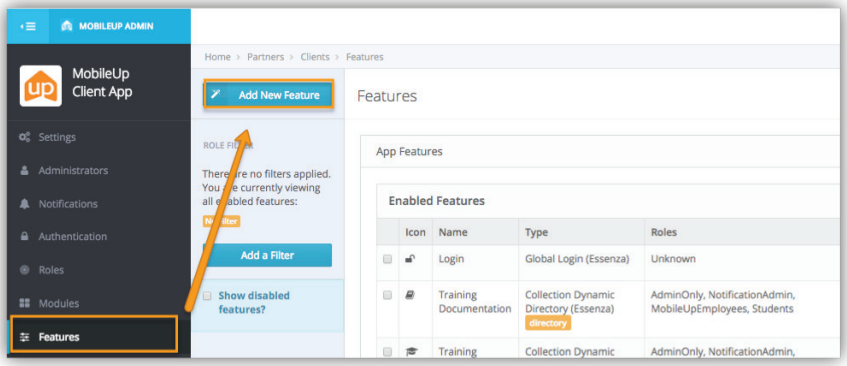
Learn how to add and manage content sections or "tiles" in your app and arrange the home screen.

CREATING A NEW TILE

1) Begin by logging in to the MobileUp administrator tools.

2) In the left-hand menu, click on the **Features** tab.

3) Click the **Add New Feature** button.

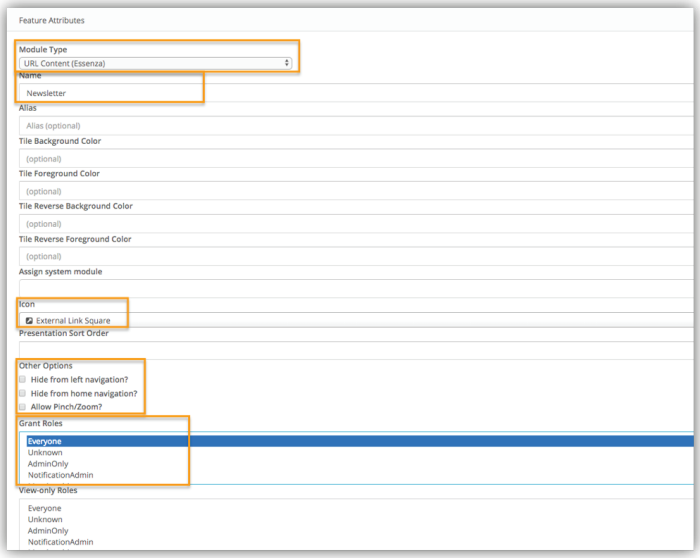


4) The remainder of this lesson creates two of the most common tiles types: **URL Content** and **Content**.

CREATING A URL CONTENT TILE

1) A **URL Content** tile links directly to a web page from within the app framework.

1. Select **URL Content (Essenza)** from the Module Type drop down menu.
2. Enter the tile **Name**, select an **Icon**, select **Other Options** (if applicable) and **Grant Roles**.
   a. Feature attributes can be changed at any time.
   b. Please contact **support@mobileupsoftware.com** if you need help configuring colors.



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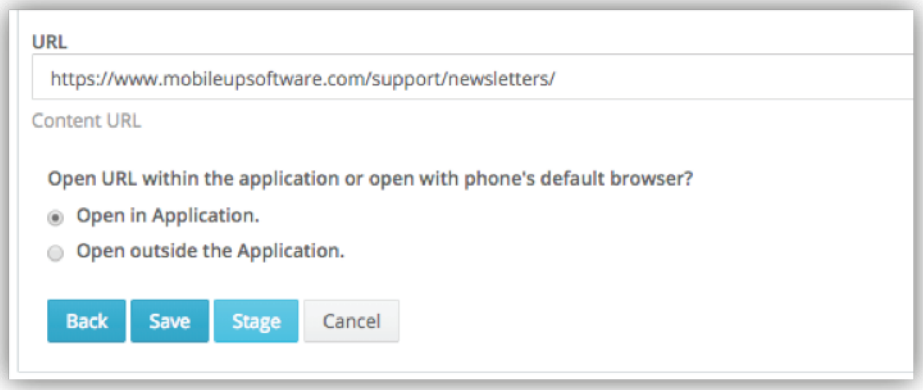
3. Click **Next**.
4. Enter the **URL**.

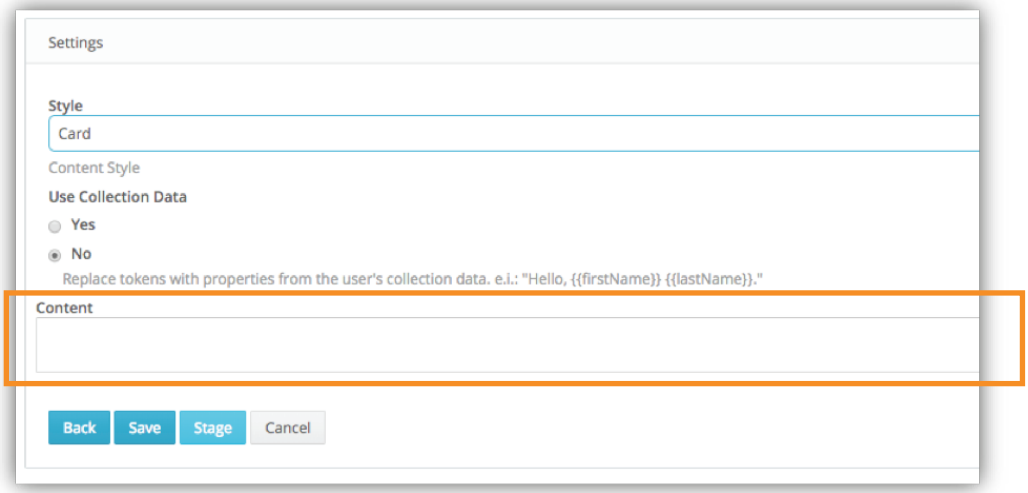


5. **Save**.

CREATING A CONTENT TILE

1) A Content tile accepts text and images and can be used in endless ways.

1. Select **Content (Essenza)** from the Module Type drop down menu.
2. Fill out the required Feature Attributes.
3. Click **Next**.
4. You can enter plain text into the **Content** field or use HTML. If you need assistance formatting the content, please contact **support@mobileupsoftware.com**.



5. **Save**.

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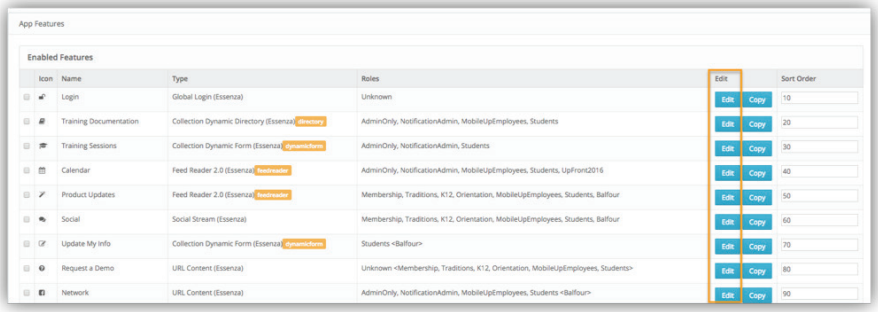
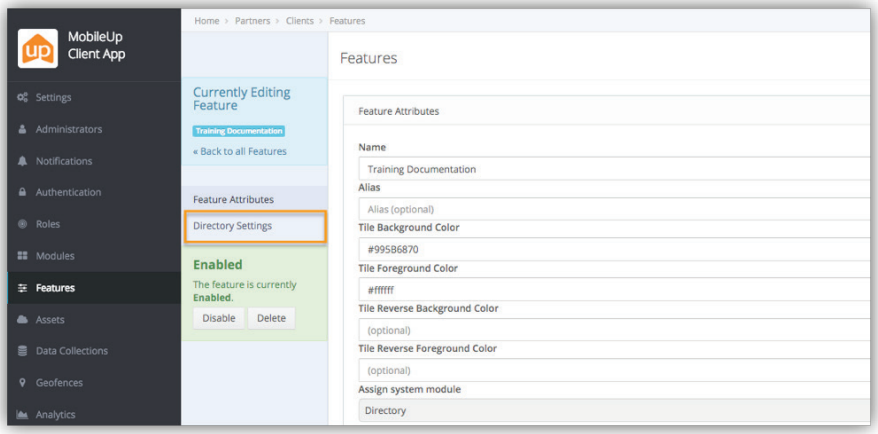
EDITING TILES

1) All of your app's tiles are displayed on the **Features** page. You can edit settings on existing tiles by clicking the edit button next to the tile you wish to edit. This will take you to the **Feature Attributes** page.



2) Additional settings will vary by the type of module. For more complex modules, such as a Directory, settings will open a step-by-step wizard. If you need assistance, contact MobileUp Software at **support@mobileupsoftware.com**.



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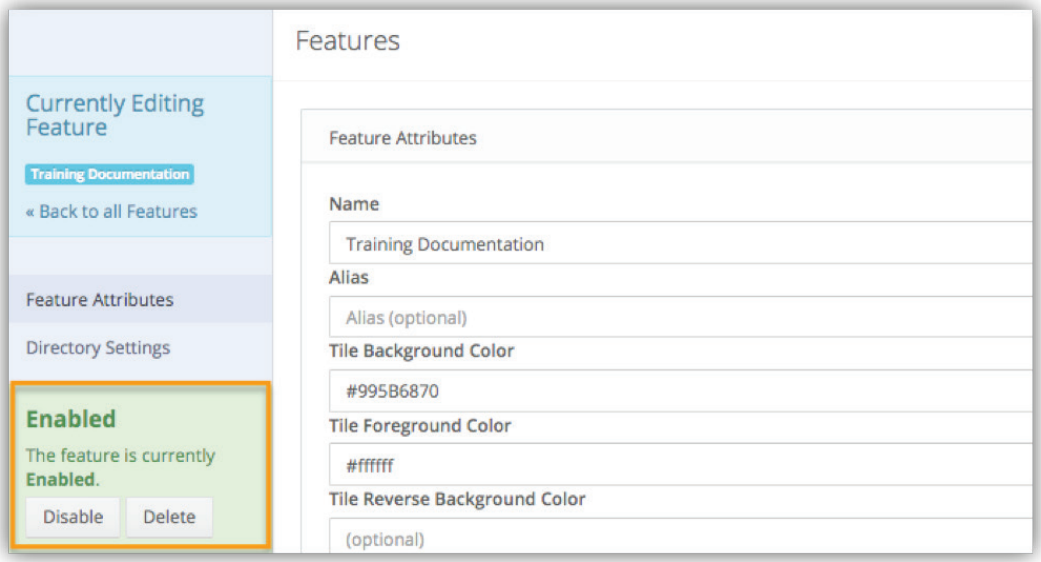
DISABLING TILES

1) In most cases, disabling a tile is preferred to deleting a tile. For example, a tile that was being used temporarily for an event, can be disabled, and re-purposed for a future event.

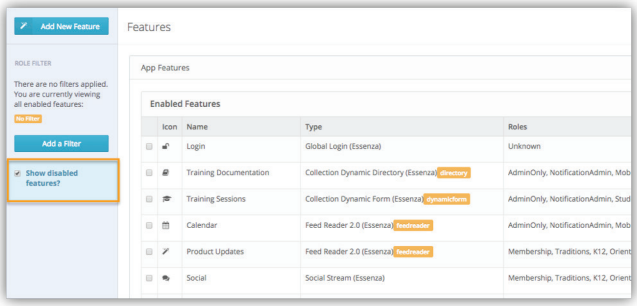
1. On the Features page, click **Edit** for the tile you wish to disable.
2. **Disable** or **Delete** the tile by clicking the buttons found on the feature attributes page.

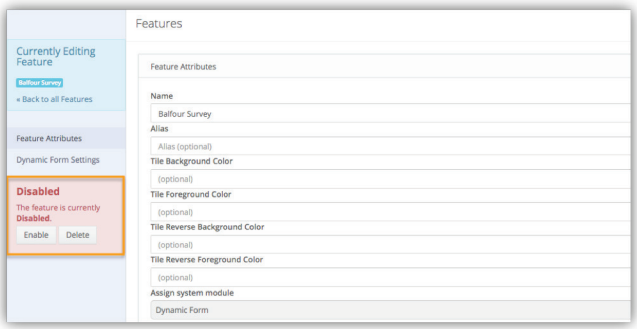


ENABLING TILES

1) You can enable (re-activate) a disabled tile.

1. Select **Show disabled features** on the Features page.
2. Scroll down to the list of **Disabled Features** that is now displayed.
3. Click **Edit**.
4. Click **Enable**.





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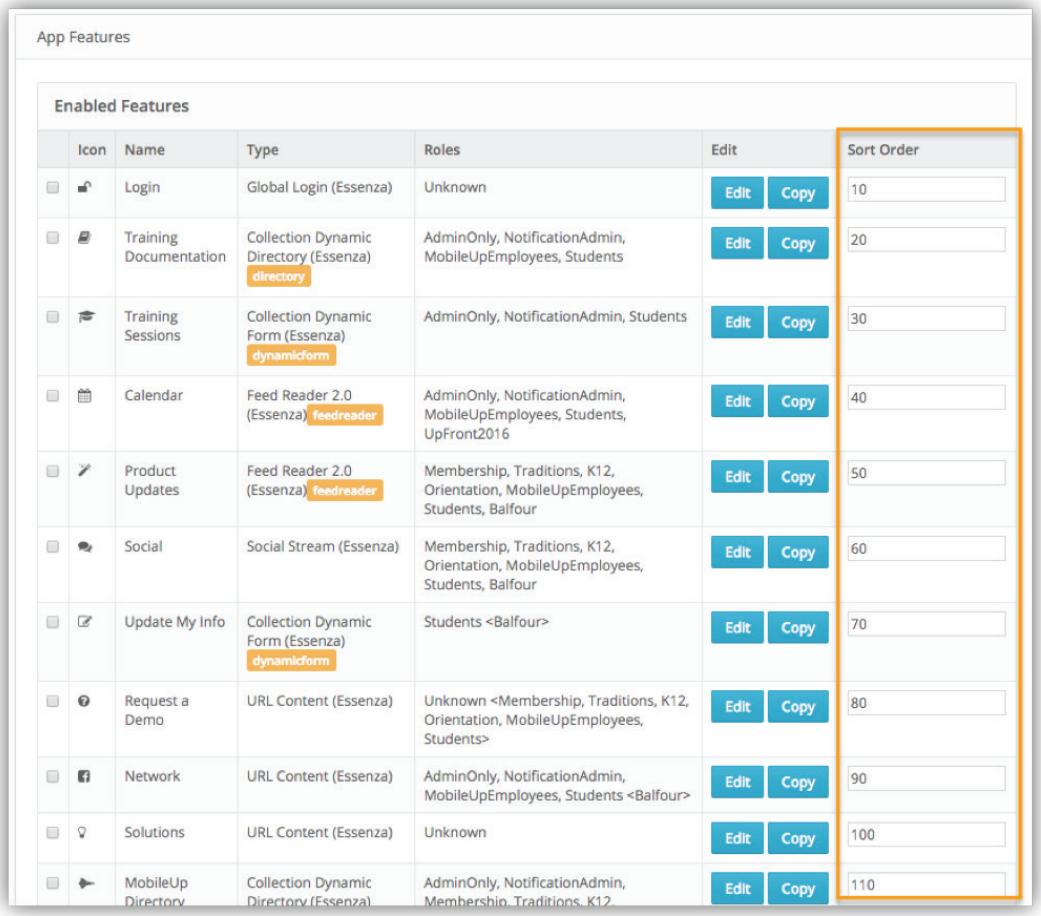
TILE SORT ORDER

1) The **Sort Order** determines the order that tiles appear on your app home screen with lower number tiles appearing first. (**NOTE:** the appearance of your home screen may vary by role.) By default, all new tiles are assigned "999" for the **Sort Order**. This can be changed at any time. Order tiles logically so that they make sense for logged in and logged out users.

NOTE: We suggest creating tiles with a **Sort Order** by tens (10, 20, 30, etc.). This way if you need to insert new tiles between existing tiles, you can do so without having to update all numbers in the **Sort Order**.



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CONTENT FEATURES

One of the most versatile features you can create for your app is a Content Feature. A Content Feature is a way to display information and images on a variety of topics natively in the app using basic HTML. Examples of Content Features might be important resources, information about an upcoming event, an About Us page, or an image of a map. The possibilities are endless!

Before you begin… Note that you will need access to your app's "Assets" to add images. If the Assets tab is not visible on the side menu of your administrator tools, contact us for access at support@mobileupsoftware.com.

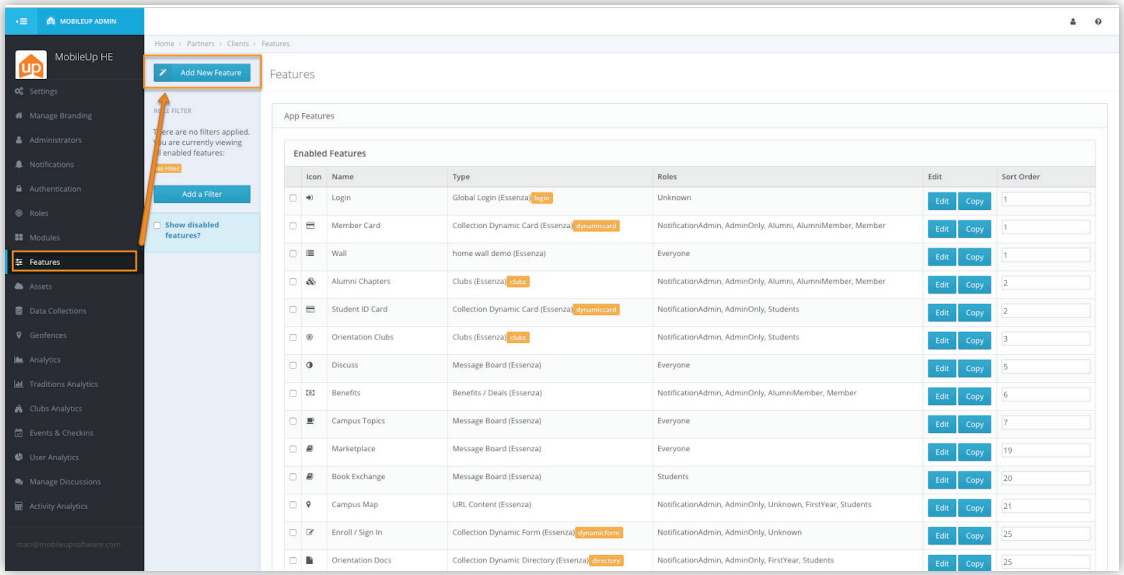
CREATING A CONTENT FEATURE

1) Sign into the online administrator tools:
https://admin.essenzasoftware.com/Clients

1. If you do not have access, please contact **support@mobileupsoftware.com**

2) Click the "Features" tab on the left-hand menu

3) Then, the Add New Feature button



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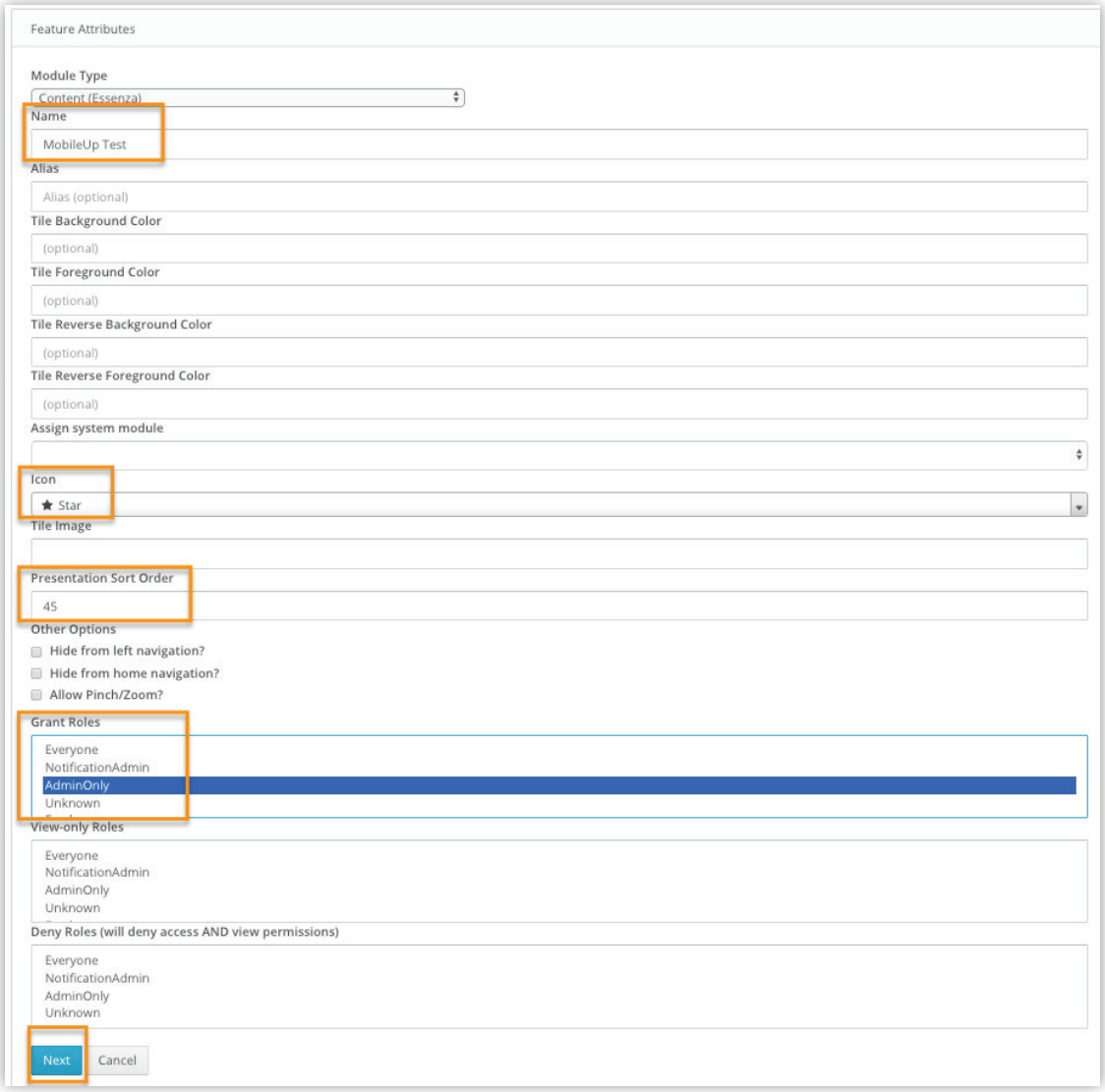
CREATING A CONTENT FEATURE (CONTINUED)

4) Under Module Type, select "Content (Essenza)"

5) Fill in the Feature **Name**, select the Icon, set the **Presentation Sort Order** on the app, and **Grant Roles**. Click **Next.**

1. Hint: Grant Feature access to the **AdminOnly** role at this stage so you can view your work on the app before it is live to everyone. This can be changed later!



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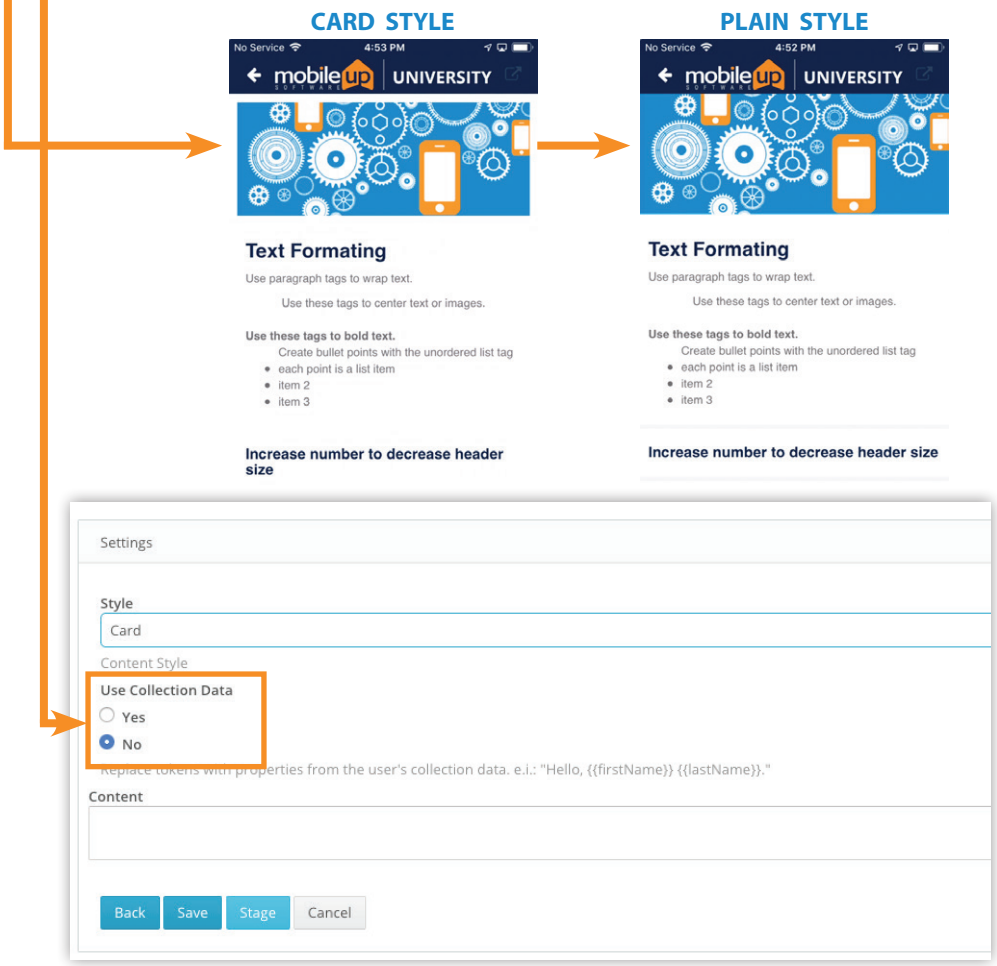
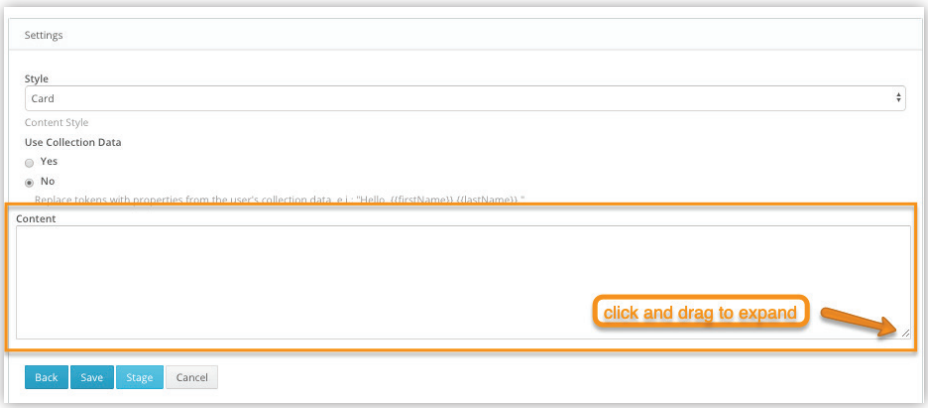
6) On the next page, make Settings selections.

1. Card Style: Margins and padding around elements are preset for you and cannot be adjusted.
2. Plain Style: A more flexible layout that enables you to adjust margins and padding around elements with HTML and CSS.
3. Collection Data enables you to personalize your content (e.g. "Hello Robert:" instead of "Hello") when users are signed in. Note: To implement this feature so that it can properly accommodate users who are signed in or signed out, contact **support@mobileupsoftware.com** for specific instructions.



7) Enter your HTML content in the text area using the code samples below for formatting. The lines on the button right corner expand the box by clicking and dragging.



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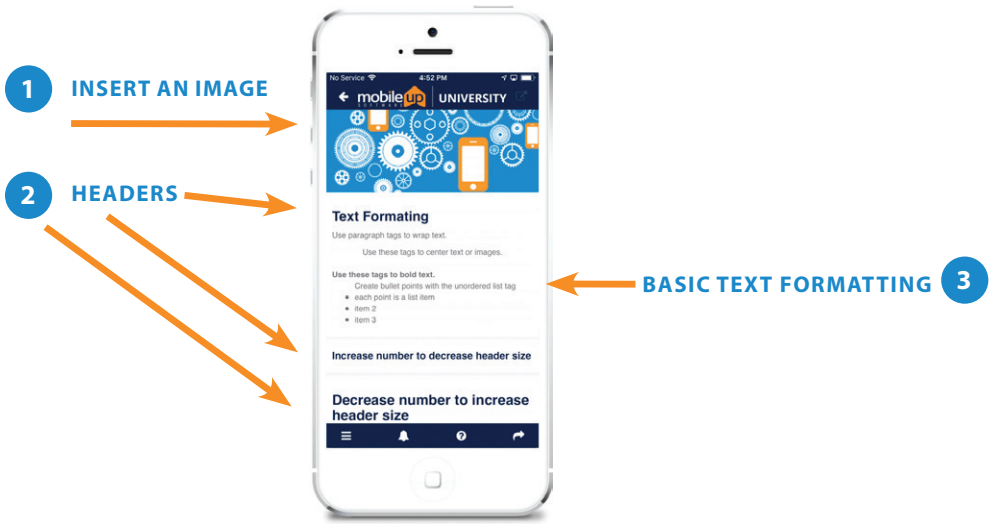

1 ADD IMAGES TO YOUR CONTENT FEATURE

It is recommended you reference images in your administrator tools' "Assets" section. Contact **support@mobileupsoftware.com** if you cannot access this section in your tools. Secondarily, you can reference images that reside on publicly accessible websites by copying their URLs into the code below. NOTE: Whichever option you choose, be sure the paths to the images are correct and stable for the long term. Missing images may cause your app to crash.

```
<img src="../../assets/client/header.png" alt="describe your image here"style="width:100%;" />
```

Exact name of image in assets goes after the last forward slash

Width can be modified to make the image smaller or larger on the page.

2 HEADERS

Use the code below to create headers in your brand color.

```
<h3 class="brand"><strong>Header text goes here</strong></h3>
```

Examples:

```
<h3 class="brand"><strong>Text Formating</strong></h3>

<section class="card">
<h4 class="brand"><strong>Increase number to decrease header size</strong></h4>
</section>

<section class="card">
<h2 class="brand"><strong>Decrease number to increase header size</strong></h2>
</section>
```

3 BASIC TEXT FORMATTING

```
<p>Use paragraph tags to wrap text.</p>

<center>Use these tags to center text or images.</center>

<br> break tags are used to create breaks or spaces in the line of text.

<strong>Use these tags to bold text.</strong>

<p> Create bullet points with the unordered list tag </p>
<ul>
    <li>each point is a list item
    <li>item 2
    <li>item 3
</ul>
```


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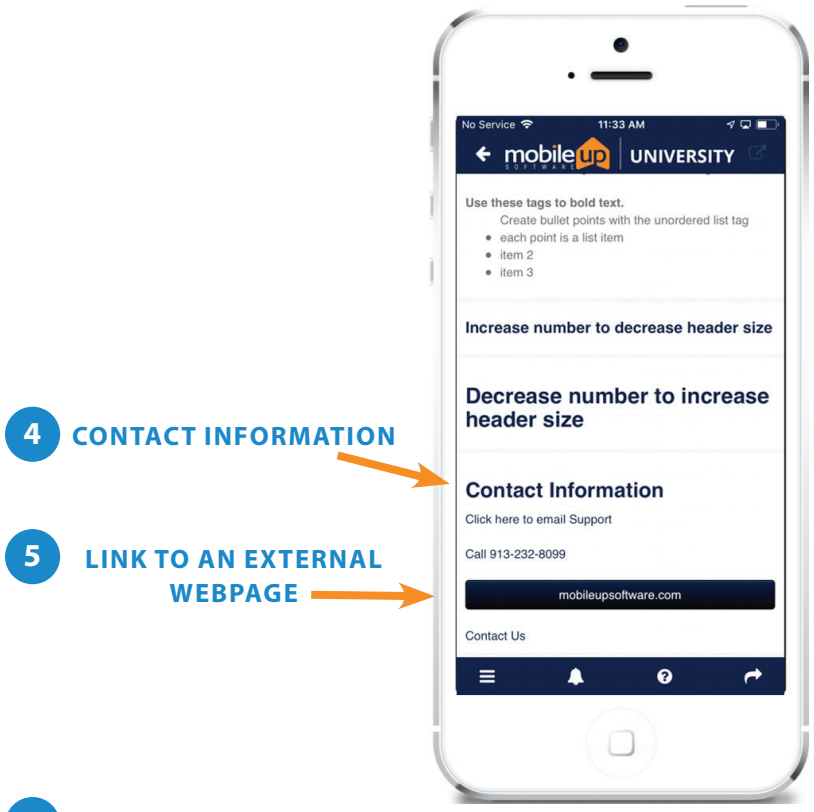

4 CONTACT INFORMATION

Clickable email address

Link text

Example:

Click here to email Support

Clickable phone number

Call 1-800-555-5555

Example:

Call 913-232-8099

5 LINK TO AN EXTERNAL WEBPAGE

Button directing to an external URL that opens in the phone's default browser

Button Text Goes Here

Example:

mobileupsoftware.com

Link directing to an external URL that will open in the phone's default browser (No Button)

Link text goes here

Example:

<a
onclick="window.open('https://www.mobileupsoftware.com/about/contact/index.php','_system')
">Contact Us

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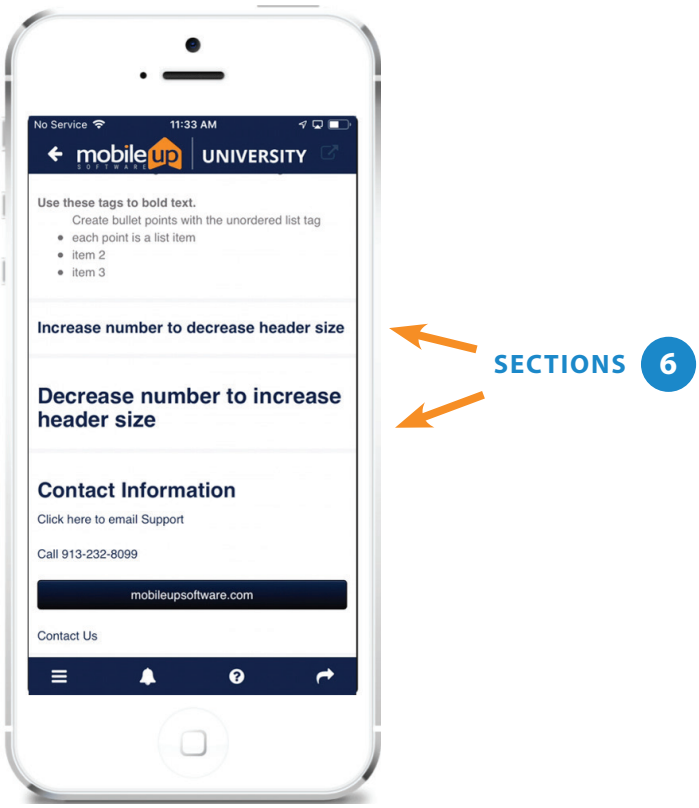

6 SECTIONS

Create sections when using the “Plain” card style. NOTE: Sections are ignored when using the "Card" style.

Beginning of section, use: <section class="card">
End of section, use: </section>

Example:

```
<section class="card">
<h3 class="brand"><strong>Contact Information</strong></h3>

<a href="mailto:support@mobileupsoftware.com">Click here to email Support</a>

<br><br>
<a href="tel:913-232-8099">Call 913-232-8099</a>

<br><br>

<a onclick="window.open('https://www.mobileupsoftware.com/index.php','_system')" class=
"btn btn-primary btn-block">mobileupsoftware.com</a>

<br>

<a onclick="window.open('https://www.mobileupsoftware.com/about/contact/index.php','_
system')">Contact Us</a>

</section>
```


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7 LINK TO EXISTING FEATURE ON APP

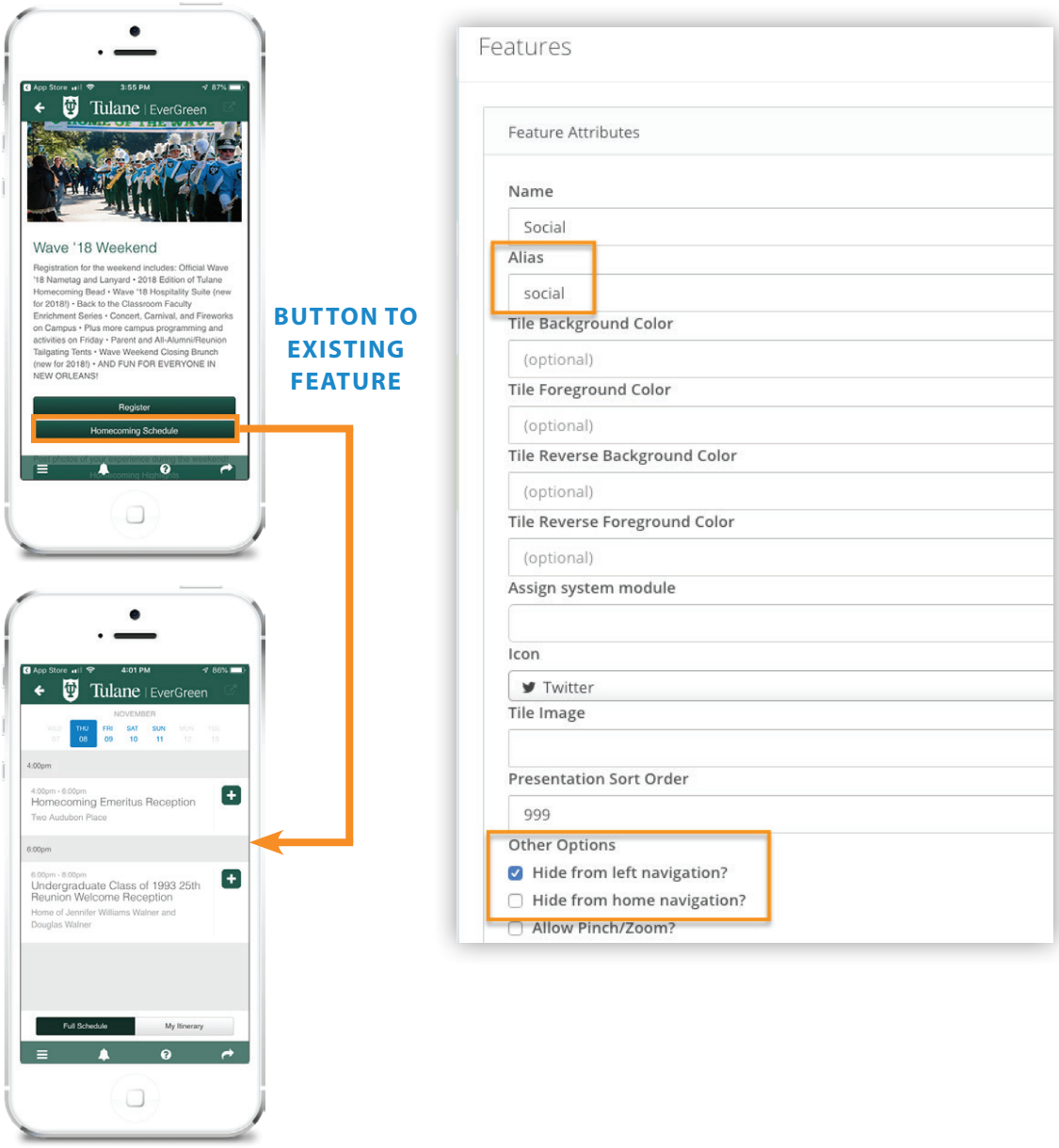
This is how to link to native features inside your app from a content feature. You can even make those features totally hidden from the app's navigation tiles and menus so they are only accessible from the content feature page.

Code for button (using alias from features) - open within app
Button Text

Example:
Social

A tap on this button will take users to an existing feature on the app. Plug in the alias on the feature.

Optional: hide page from both menus so it is only accessible through the Content Feature.



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GEOFENCES

Learn how to trigger notifications and collect participation data based on your users' physical locations through geofences and location services.

ACCESSING AND WORKING WITH GEOFENCES

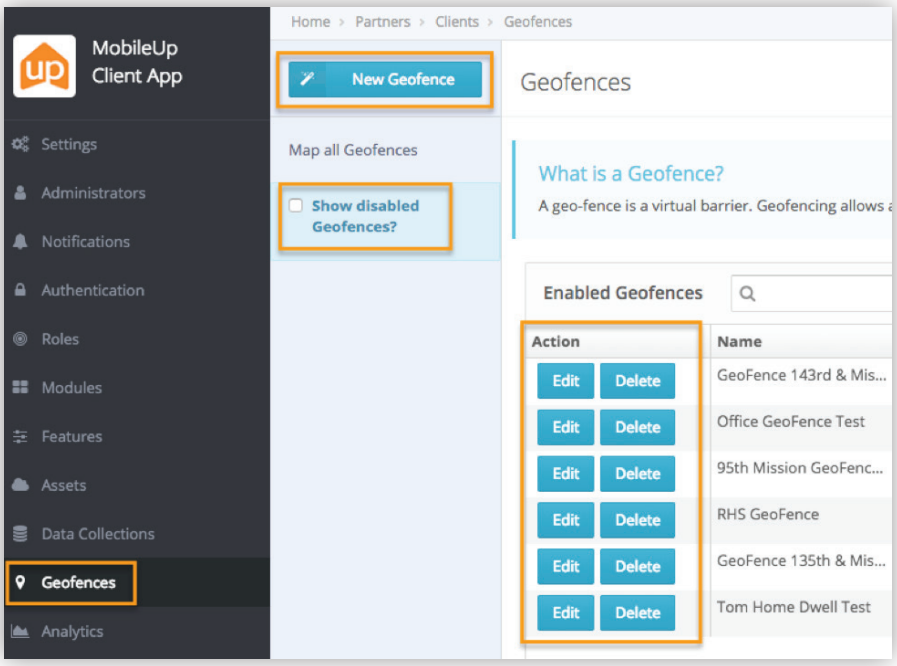
1) You can access the **Geofence** section from the left-hand navigation after you have logged into your MobileUp administrator tools. From this screen, you can create a **New Geofence**, **Show disabled Geofences**, or **Edit**/**Delete** enabled geofences. You can communicate to your users when they enter or exit a targeted location.

NOTE: If you do not see the **Geofence** option listed in the left-hand navigation, please contact **support@mobileupsoftware.com** to activate this feature.

2) If you would like to create a new Geofence, simply click the button labeled **New Geofence**. (Skip to Step 6 for more information on creating new geofences.)

3) Conversely, you can choose to **Edit** existing geofences or check the **Show disabled Geofences** box on the left-hand side to display previously created geofences.

4) For all geofences that display, you have the option to **Edit** or **Delete** them.



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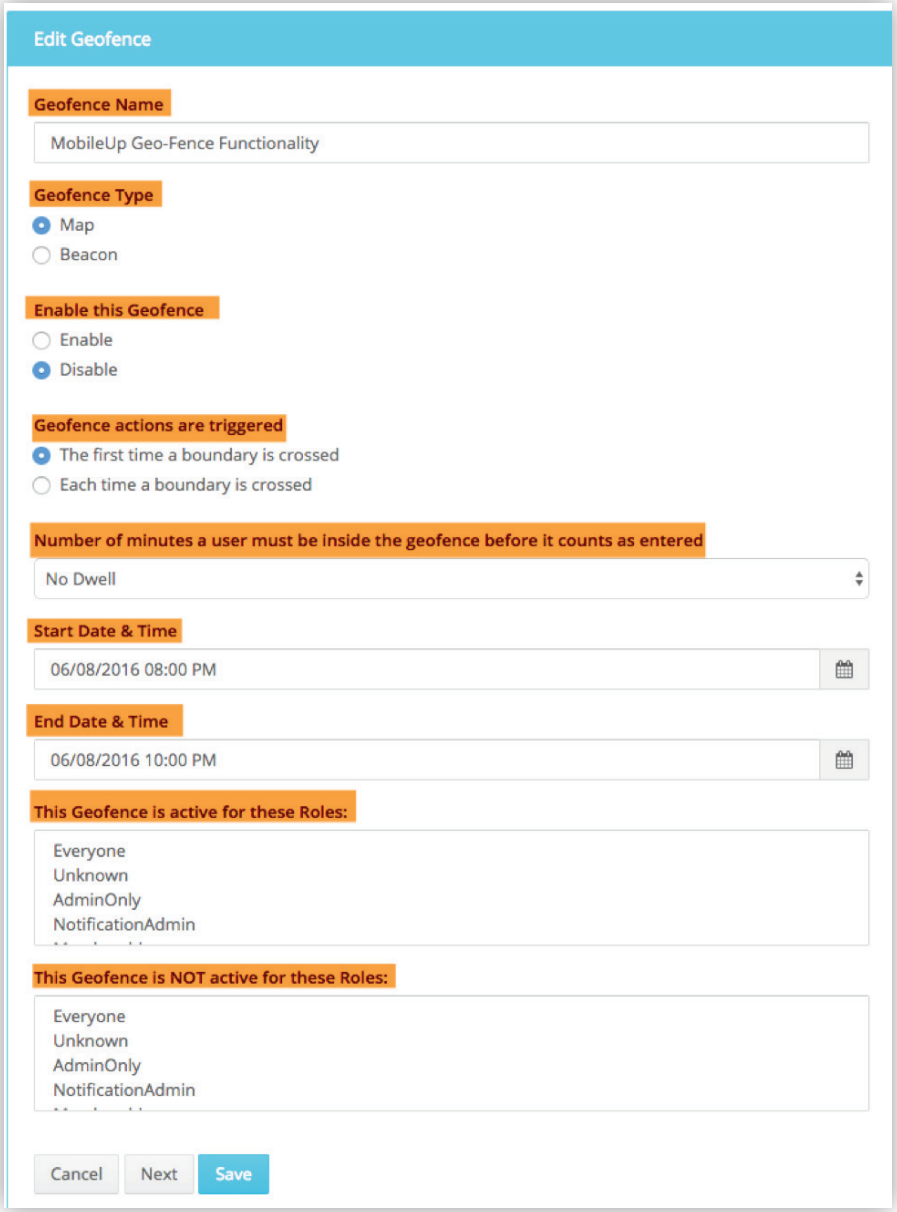
5) Whether you are editing an existing geofence or creating a new one, you will see the following options. See the table below for explanations.



Geofence Name	Pick a descriptive name that will help you remember its purpose. It is not displayed to your users.
Enable this Geofence	Choose to make the geofence active or inactive.
Geofence actions are triggered	Allow the geofences to track people/send notifications either every time someone enters/exits or only the first time.
Start Date & Time	Date and time the geofence will begin to be active.
End Date & Time	Date and time the geofence will stop being active.
Active Roles	Group(s) the geofence should detect.
Inactive Roles	Group(s) the geofence should ignore.

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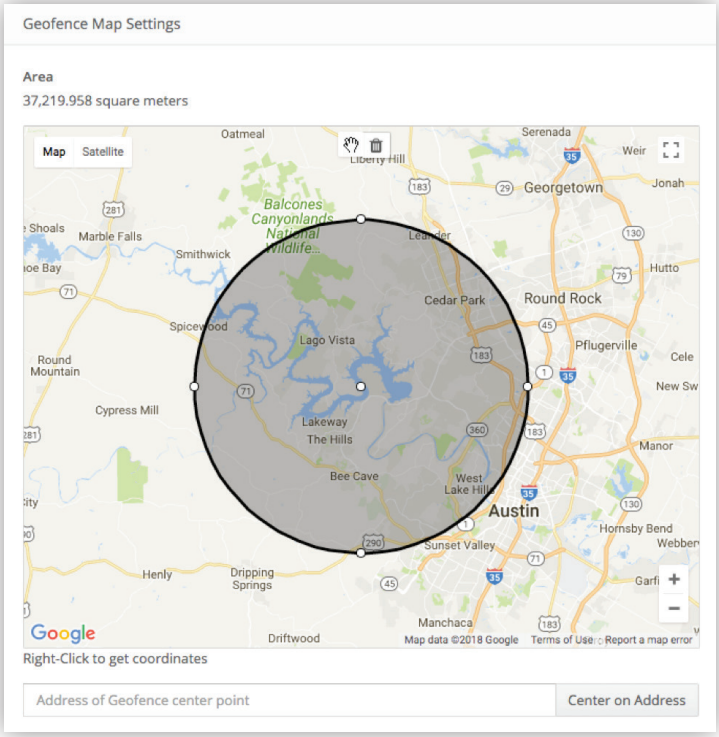
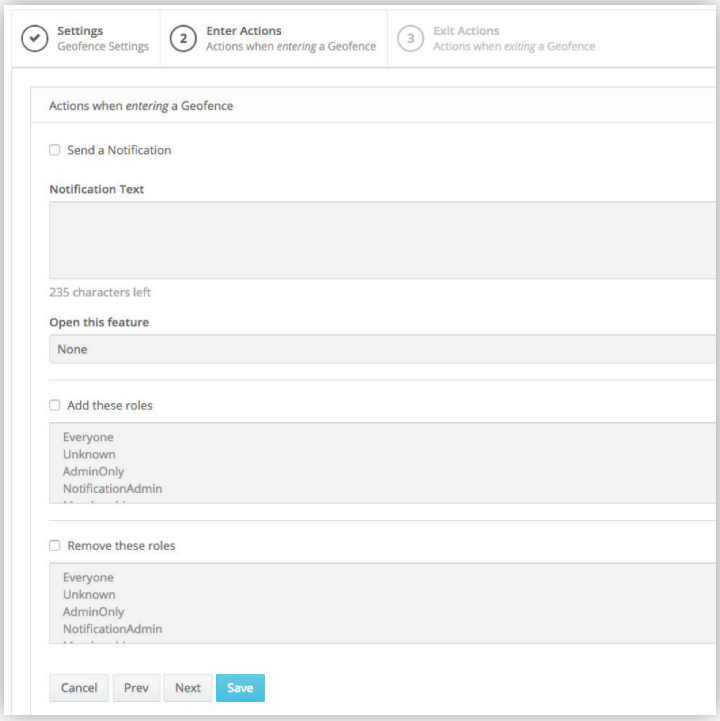
6) For new geofences, complete the information in Step 5 then use **Geofence Map Settings** to center on an address and draw a geofence around it using either **Map** or **Satellite** view.



7) Once the geofence has been created, the next steps are **Enter Actions** and **Exit Actions**. These allow you to send notifications, open specific tiles in the app, and add or remove roles all by entering or exiting a geofence's boundary.



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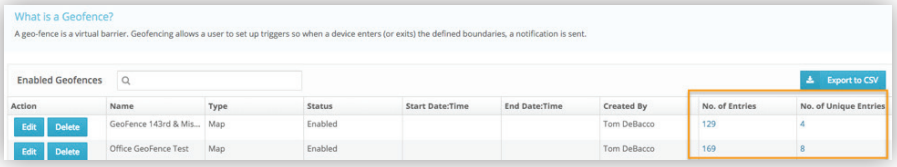
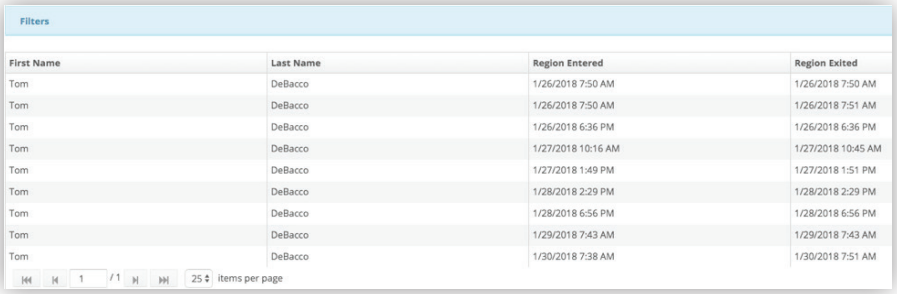
8) Once your geofence is set up and people begin to enter into its range, you can view this activity on the geofences home page:

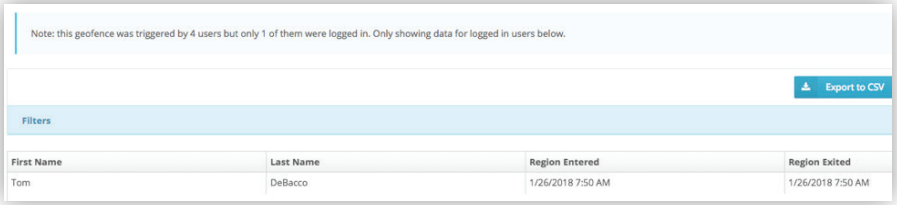


9) The numbers that display here are clickable, allowing you to view the names of anyone who was logged in when they triggered the geofence. There are **Regular** and **Unique** entries.

Regular entires, found under the label **No. of Entries** tells you the total number of times a geofence is crossed, including each time a specific user enters:



No. of Unique Entries counts each person only once, regardless of how many times they've crossed the geofence:



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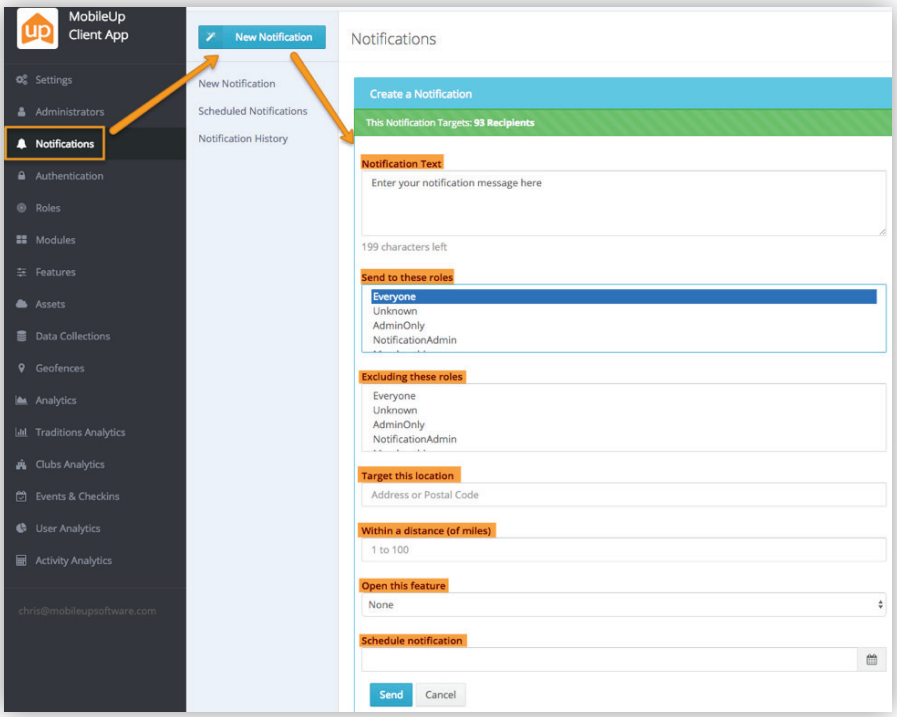
SENDING NOTIFICATIONS

Get the attention of your app users with notifications. Learn how app administrators can build, schedule, and send them from MobileUp's web-based tools or apps.

SENDING NOTIFICATIONS WITH WEB-BASED ADMINISTRATION TOOLS

1) After you have logged into your MobileUp administrator tools, you can access the **Notifications** section from the left-hand navigation to begin to communicate to your users through this feature.



Notification Text	Text sent to users in the notification, limit of 235 characters.
Send to these roles	Intended group(s) of users that should receive the notification. You can select multiple roles.
Exclude these roles	Group(s) of users who should not receive the notification. You can select multiple roles.
Target this location	Targeted location of the notification. Use street address, city, state, and zip.
Within a distance (miles)	Choose from 1- to 100-mile radius surrounding the targeted location.
Open this feature	Tile to send users to after they click on the notification.
Schedule notification	Future date and time you would like the notification to automatically send to users.

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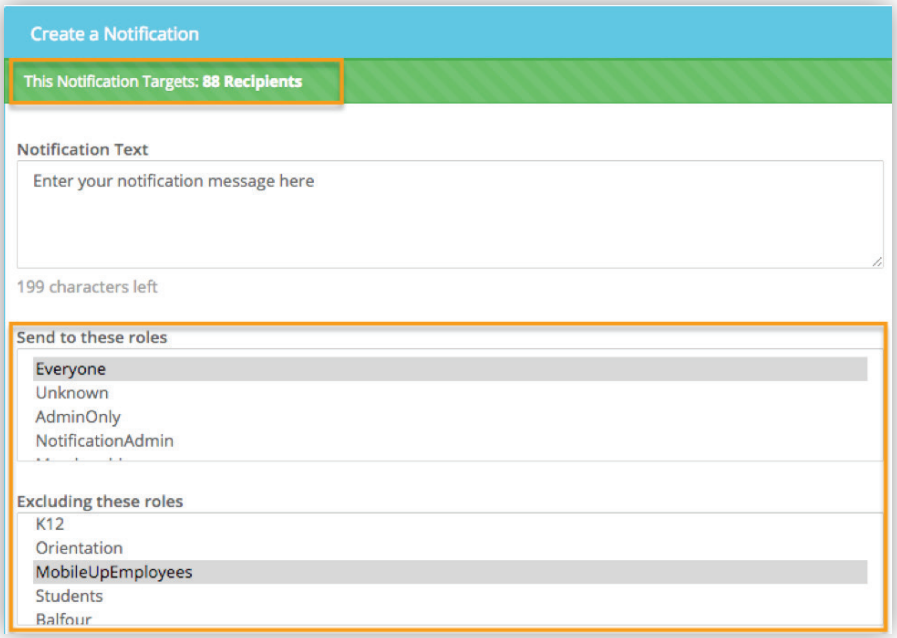
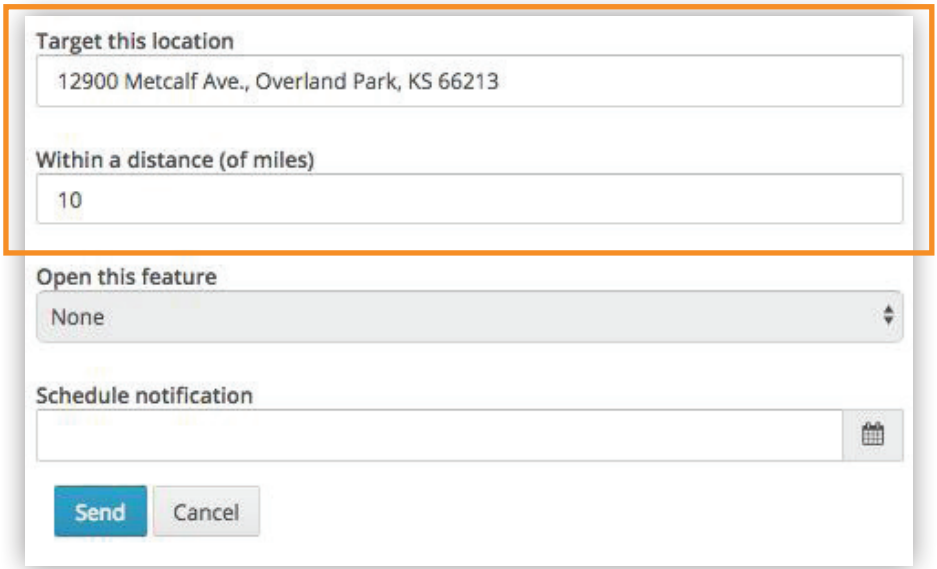
2) EXAMPLE

Consider you are sending out a notification regarding an event for everyone but internal employees ("MobileUpEmployees" in this case). If you send to the **Everyone** role and exclude the **MobileUpEmployees** role, all users but **MobileUpEmployees** will receive the notification.

After choosing your roles you will see the number of recipients in the green bar at the top of the screen.



3) You have the ability to send notifications based on geo-locations. By using street address, city, state, and zip you can send notification to a radius of 1 to 100 miles from your targeted location.



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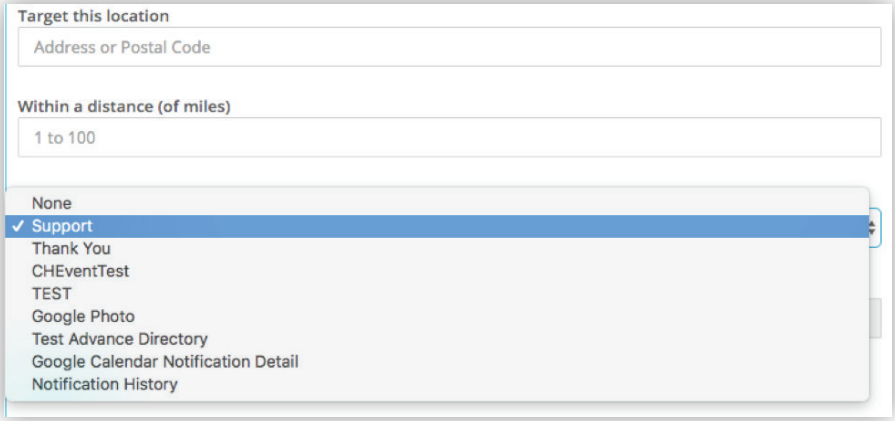
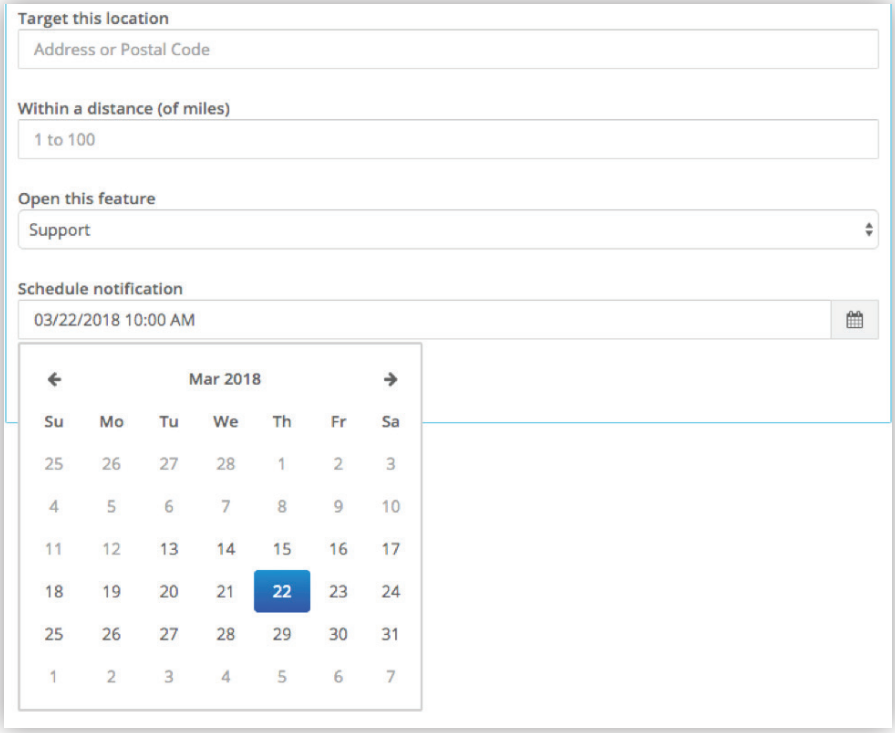
4) You have the ability to direct users to a specific tile after opening the notification. From the **Open this feature** dropdown select the appropriate tile where you would like to send users.



5) You have the ability to schedule notifications for a future date and time. (This is available in the web-based administration tools only). By clicking in the box or the calendar icon on the right-hand side you will choose the date and time you would like the notification to send. Notifications can be scheduled at the top of the hour.



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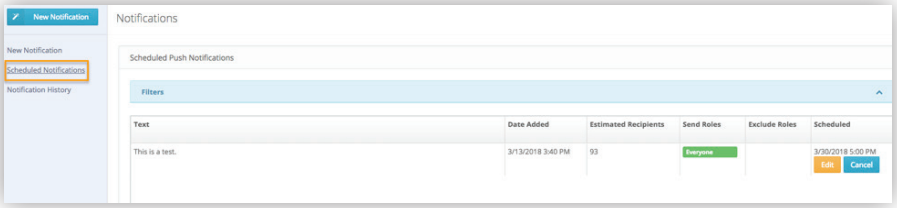
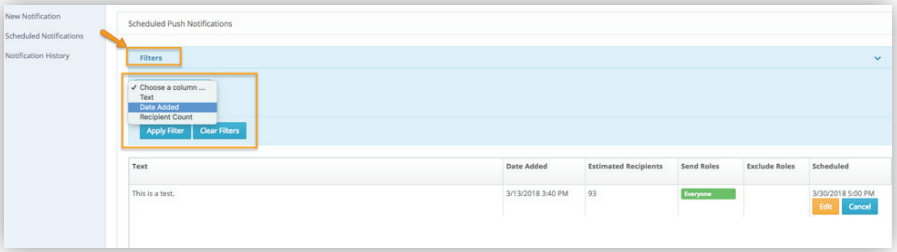
6) You can view a history of notifications that have been sent. Click on **Scheduled Notifications** to view the grid. Notice the **Scheduled** section. If you notice a mistake in the message or need to update information, click the **Edit** button. Alternatively, click **Cancel** to delete the notification.



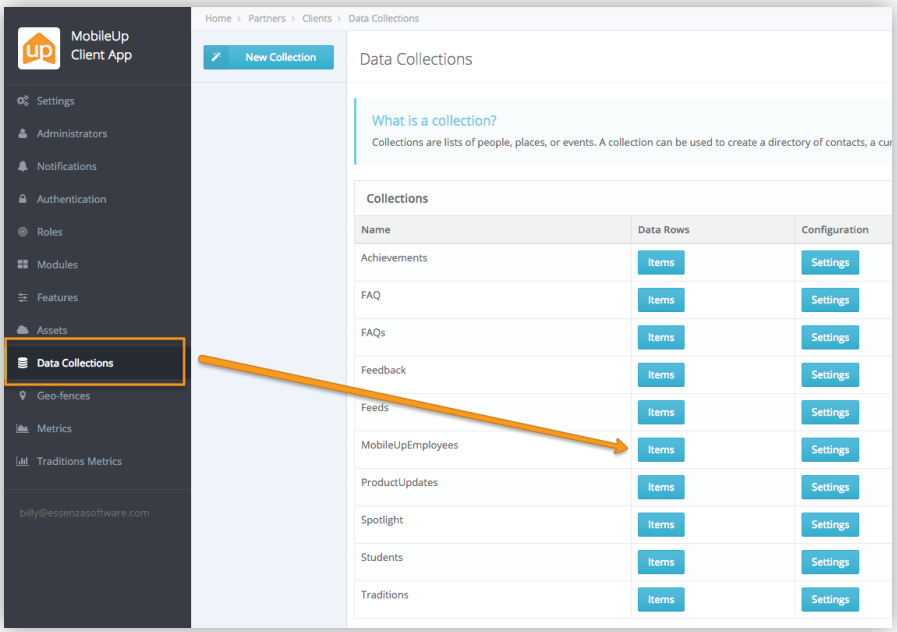
7) You have the ability to filter the notification history grid. Click the blue **Filter** bar to display the filter options of **Text**, **Date Added**, or **Recipient Count**.

TIP: This area is useful if you need to verify a notification was sent.



EXPORT TO NOTIFICATIONS WITH WEB-BASED ADMINISTRATION TOOLS

1) You have the ability to send notifications from data collections. Click on **Data Collections** from the left-hand navigation. Find the correct **Data Collection** and click **Items** to access the data.



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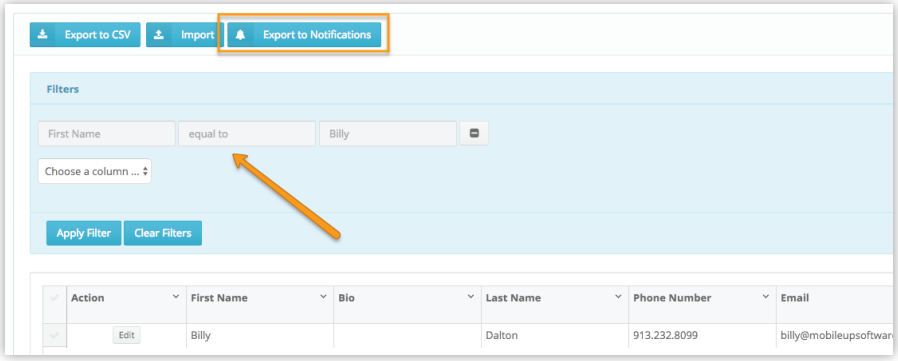
2) Click on the **Filter** bar to search the collection. Choose the appropriate filter(s) to target your notification. Once the search results display, the **Export to Notifications** button will appear.



TIP: This method enables you to select users for a notification without necessarily having to create additional roles. For example, you might want to target a specific graduating class year in your data with a notification. Filtering and exporting those contacts from your data collection saves many steps versus creating roles for each graduating class. **NOTE:** You cannot use this method to send notifications based on geo-location at this time.

SENDING NOTIFICATIONS WITH YOUR APP

1) As an administrator, you have the ability to send notifications from your mobile device. (If you are not seeing this feature in your app, contact **support@mobileupsoftware.com**).

After logging in to your mobile app, you can get started sending notifications by clicking the **Send Notification** tile from the home or left-hand navigation.

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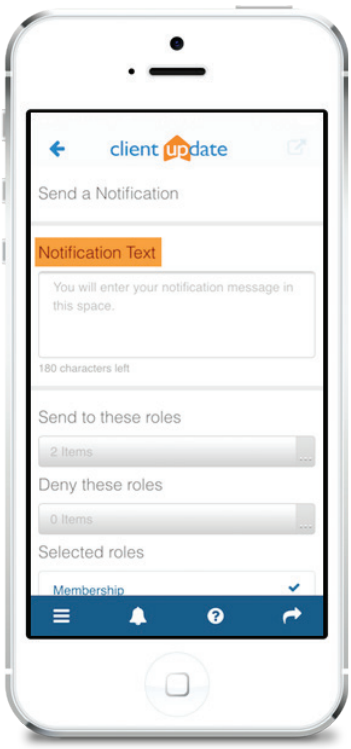
2) Begin by entering your notification in the **Notification Text** area.

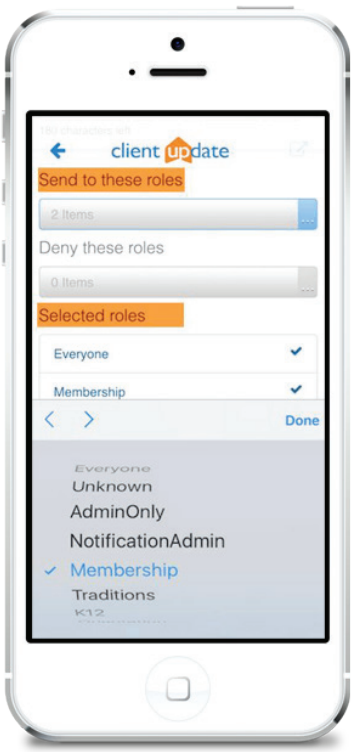
NOTE: The send notification tool will support the use of emojis. Please note that all mobile devices are not created equally. Some emojis will not translate to different devices so use them with caution. When in doubt, always send test notifications to different mobile devices (Android vs. Apple) to ensure your emojis will display properly on both devices.



3) You have the ability to target a specific group of users who you would like to receive the notification. Using the **Send to these roles** option, you can select which roles to receive the notification. You can select multiple roles.

On the other hand, you can also deny certain groups from receiving a notification. Use the **Deny these roles** dropdown to choose the roles to exclude from the notification.

NOTE: You can select multiple roles from the role picker. If you need to remove a role, go back into the appropriate dropdown and de-select the role you want to remove.



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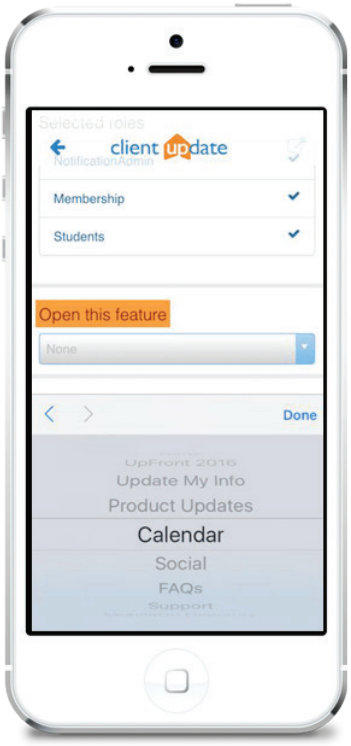
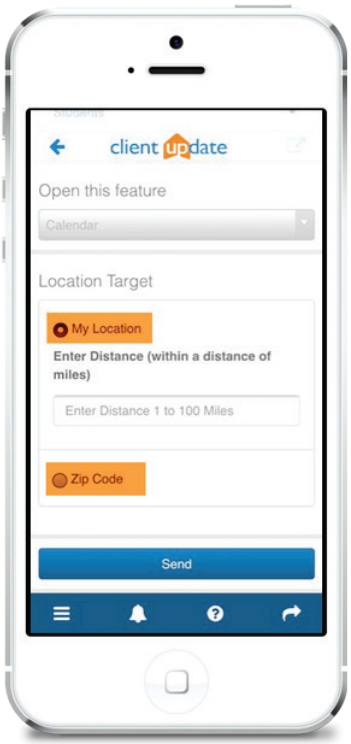
4) You have the ability to direct users to a specific tile after opening the notification. From the **Open this feature** dropdown select the appropriate tile to send users.



5) My Location: You have the ability to send notifications to users within a certain distance of your current geo-location. You can reach users in a radius of 1 to 100 miles.

Zip Code: You can send notifications based off of a zip code. Select the 'Zip Code' option and enter the zip code. Then enter the number of miles to create the targeted radius.



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DISCUSSIONS

Engage users with your app and each other through threaded conversations. The Discussions features are also a good way to collect feedback on issues of importance to your leadership team.

OVERVIEW

1) This section describes the steps required to create and host threaded conversations in your MobileUp app.

2) A general workflow looks like this:

SET UP YOUR DISCUSSION

Our two-step wizard collects basic information from you that will be used to define and build the Discussion in your app.

FOR EXAMPLE:

Student Marketplace

DEFINE YOUR CATEGORIES

Each Discussion includes Categories. Use these to further narrow your topics and make it easier for users to find messages that are relevant to them. Manage Categories in the second step of the Discussion wizard.

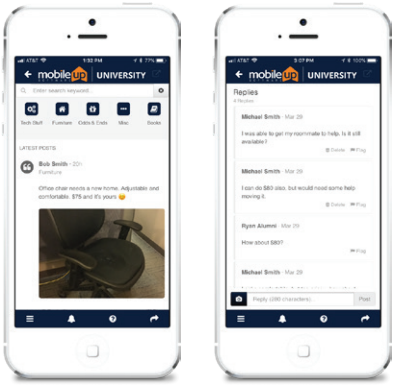
FOR EXAMPLE:

Student Marketplace

- **Tech Stuff**
- **Furniture**
- **Odds & Ends**
- **Misc**
- **Books**

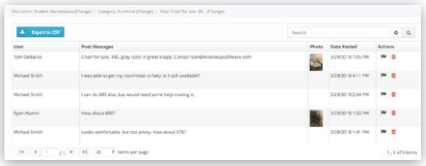
START THE CONVERSATION

Just like that, your Discussion is live! It is private to your mobile audience and users must be signed in to participate.



MONITOR AND REPORT

Tools are in place for you to monitor each Discussion for content as well as complete reporting on every Discussion, Category, and Post.



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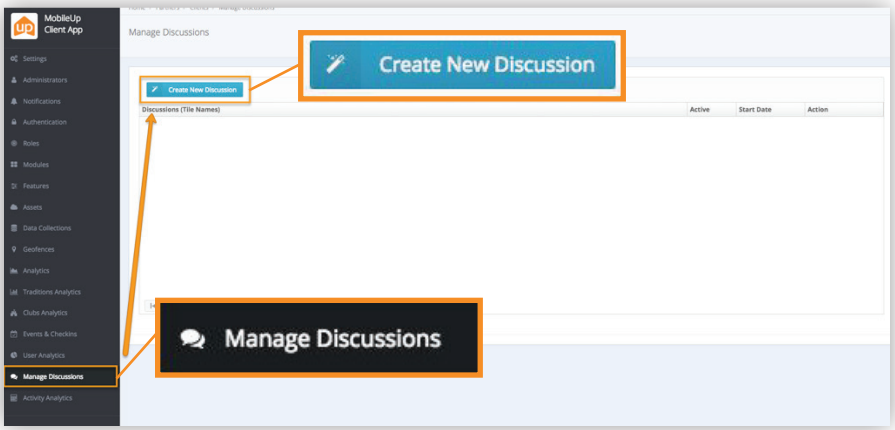
CREATE A DISCUSSION

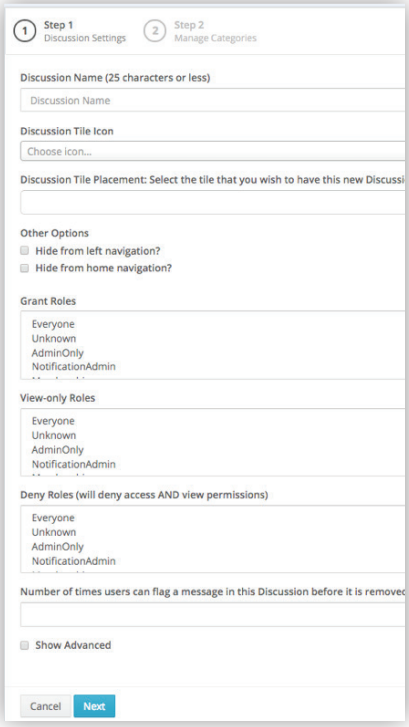
1) After you have logged into your MobileUp administrator tools, click **Manage Discussions** on the left menu.

2) Click the **Create New Discussion** button.



CONFIGURE DISCUSSION SETTINGS

1) Here are the available options in Step 1 of the Create Discussion wizard:



Discussion Name	This is the name of the overall Discussion. This name will appear on your home screen Tile in the app. (See also next page.)
Discussion Tile Icon	The icon that will appear on your home screen Tile.
Discussion Tile Placement	This determines where your new Tile will appear in the app. Your new Discussion appears after the Tile you select.
Hide from left or home navigation	These selections determine where your Discussion will be visible.
Roles	You can choose which user roles will and will not have access to the Discussion. You can set roles by categories, too.
Flags threshold	Users have the ability to flag a post they find inappropriate. Once the flag threshold is met for a post, the post will disappear automatically from the app. The administrator also has the ability to remove a post by flagging it at any time, and can also restore a flagged post.

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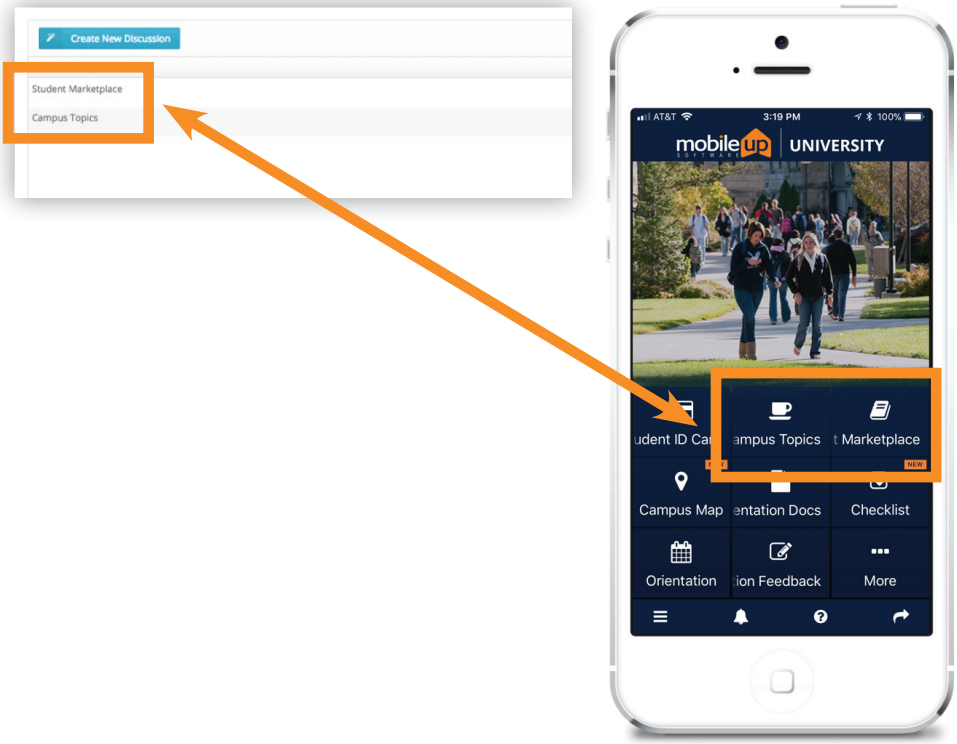
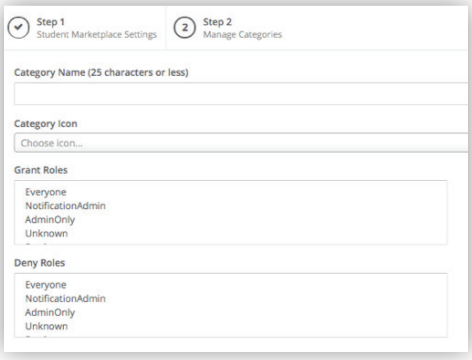
2) How Discussion Names Appear in the App: Each new Discussion creates a separate Tile with the name you use on the home screen of your app as illustrated here:

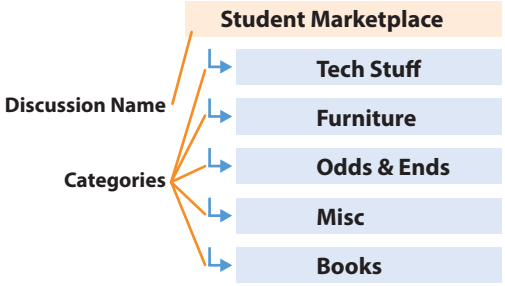


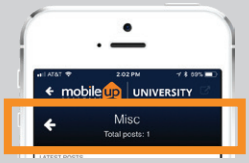
CREATE CATEGORIES

1) You can have unlimited **Categories** under each **Discussion** topic. Categories help users narrow their conversations to specific topics and make **Posts** that are of interest to them easier to find. Any of these settings can be modified at any time, even after the **Category** is live. Here are the available options in Step 2 of the Create Discussion wizard:



FOR EXAMPLE:



Category Name	This is the name of the category that will appear at the top of the Discussion. 
Category Icon	This appears above the Category name at the top level of the Discussion.
Roles	Roles can be granted and denied for individual categories, which determines their visibility within the overall Discussion.
Activate and Deactivate:	The date range in which your category will be active or visible in the app. Leave both fields blank to keep the Category active (visible) at all times.

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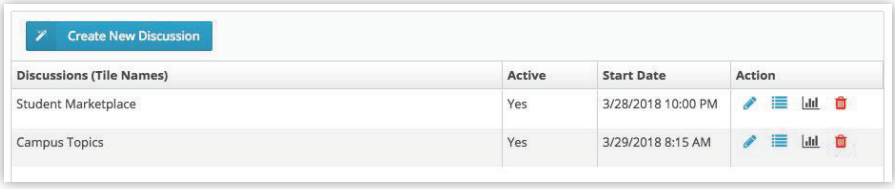
MANAGING AND REVIEWING DISCUSSIONS

1) When created, **Discussions** will appear on the landing page of the **Manage Discussions** tab in the administrator tools.

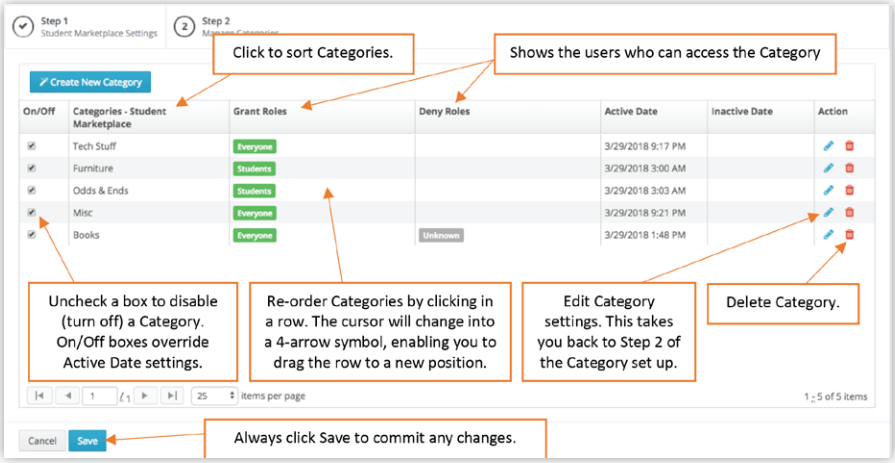


2) The icons in the **Action** column at the right of each **Discussion** row are:

	Edit the **Discussion** settings. (See the Create a Discussion section.)
	Manage Categories within a **Discussion**.
	View reports by **Discussion, Category** or **Post**.
	Delete a **Discussion** or **Post**.

MANAGE CATEGORIES

1) Manage **Categories** within a discussion as follows:



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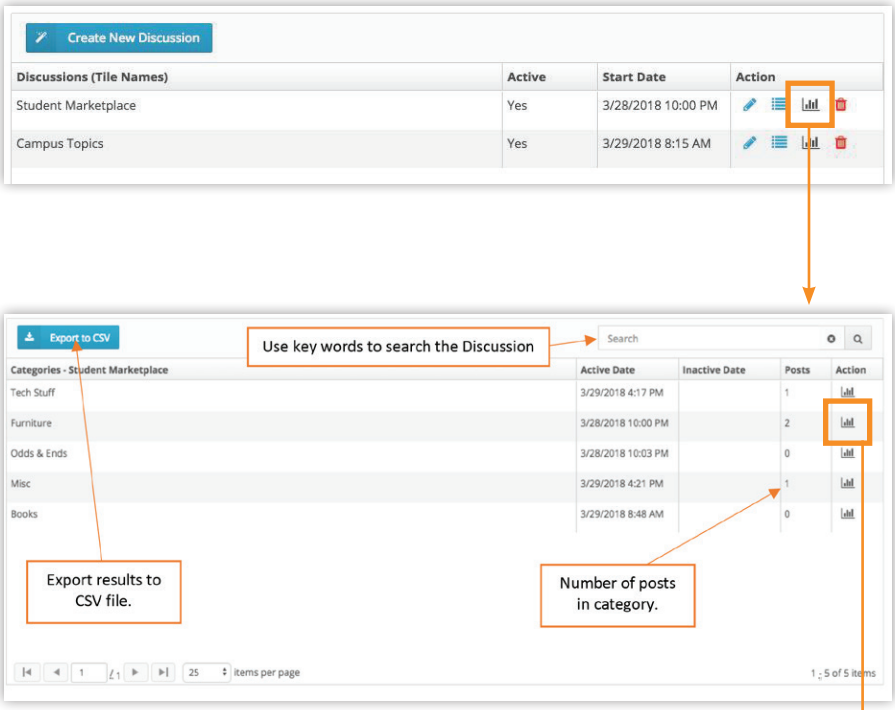
REPORTING

1) There are various levels of reporting available. Click to drill down to the following levels:

DISCUSSIONS → CATEGORIES → POSTS

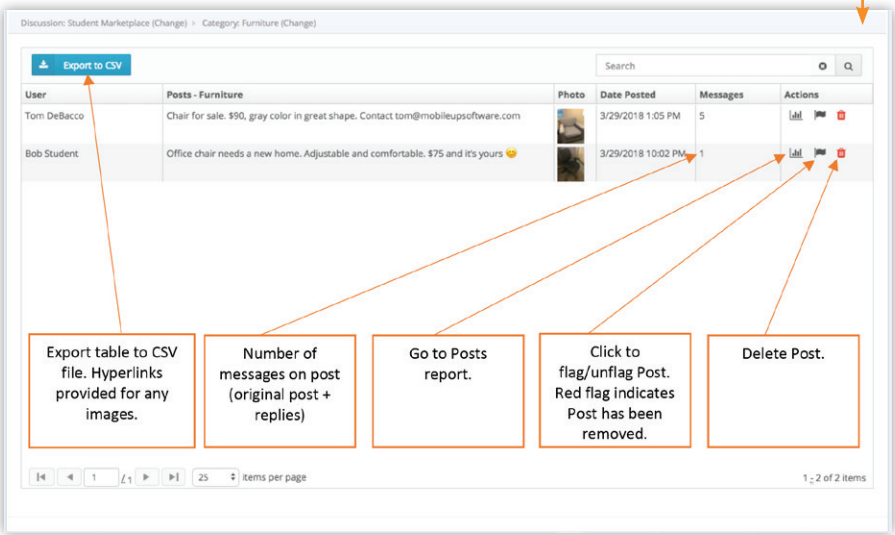
DISCUSSION REPORTING

1) Click on the **Manage Discussions** tab in the administrator tools navigation and then the reporting icon of the **Discussion** where you are wanting more information.



CATEGORY REPORTING

1) Click on the number or reporting icon to see information for that category.



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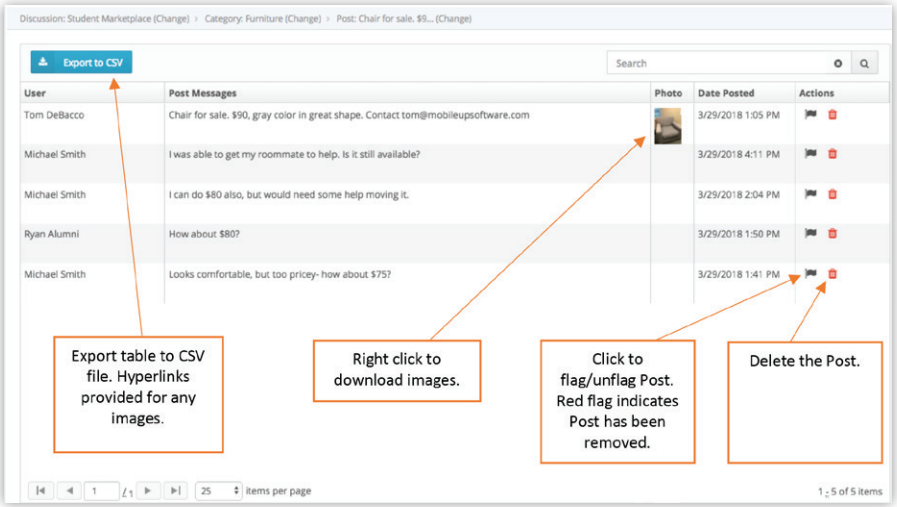
POST REPORTING

1) Click on the Posts number or reporting icon in a category reporting row (see previous page):



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WHERE TO GET HELP

CONTACT MOBILEUP SOFTWARE

If you need assistance, please contact us at **support@mobileupsoftware.com**.

Our support hours are from 8:00 a.m. to 5:30 p.m. CST, Monday through Friday except holidays.

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