# Login

Go to [www.kazume.com](http://www.kazume.com)

Login with username and password

# Dashboard

The dashboard is a quick view to your recent messages, vault folders and file folders.

# Vault

Vault data can be used to store and manage your important data. It can be used as a data repository to auto-fill data in processes.

* 1. Enter data into a Vault
  + Click on ‘Add new data category’ (e.g. Category could be ‘Home’, ‘Financial’, ‘Insurance’)
  + Enter Category name and description
  + Click on the category
  + The Items window will show up on the right
  + Click ‘Add Item’
  + Select ‘Data type’ from dropdown
  + Enter item label name
  + Enter item value
    - e.g. Data type = ‘text’, label = ‘First name’, Value = ‘John’
    - e.g. Data type = ‘Date’, label = ‘Spouse’s birthday’, Value = ‘1/1/1980’

# Files

File storage similar to dropbox with sharing agreement capability

* 1. Upload a file
* Click on ‘Add file category’
* Enter Category name and description (e.g. Taxes)
* Click on File category
* Click to upload a file
  1. Share a file
* Click on Green button next to file to share
* In Sharing window, select one or more participants *(refer to Participants section for steps on how to enter a* participant)
* Select last day of month in ‘Allow to Retain’
* Click OK
* Check Files category ‘Files shared by me’ to see the files shared
* A message will show up on Participant’s Agreement section. Once Participant approves the sharing agreement, the file will show up in their Files category ‘Files shared with me’

# Participants

Participants is used to maintain your people contacts. The Participants managed here can be used to share files with and engage in processes.

* 1. Add a participant
* Click on ‘Add new category’ (e.g. ‘Friends’, ‘Family’, ‘Co-workers’)
* Select the category
* Click on ‘Add New participant’
* Name and Email are required. You cannot enter 2 participants with the same email id. Email is used to uniquely identify a participant
* Notes field can be used to manage any information that you want to store about this participant. One or more notes can be entered. They are date stamped.

4. Process - Invite a customer to a process. Fill up forms

Steps

Click on Life insurance

Click Send

Select Pam from list of participants

Enter email inviting participant to process

Logout

Login as Pam

Go to Agreements. Accept Agreement for file shared by Nathan

Go to Files —> ‘Files shared with me’

Download file shared by Nathan

Go to Process.

Click on Nathan

Click on Life Insurance

Click on Insurance application

Update the data in the process

Click on ‘Chat’ to send a message to Nathan ‘Hi Nathan I have entered data in the process’

Click ‘Generate form’

Go to Vault.

Go to Filled forms

Click on download to open form

Click on Green button to share form with Robin

Log in as Robin to Accept agreement

PDF form  will show up in ‘Files shared with me'