# AIM Institute for Technology and Research

# Feature Setup

ReFrame Engage Production URL for AIM Institute of Technology & Research

app.reframeengage.com

1. **The Call Center** Feature is automatically configured and turned on for your staff. Each staff you add will automatically receive this feature. Selecting "available" in the upper right-hand section of the application will allow the staff to make outbound calls and receive inbound calls.
2. ReFrame has configured the welcome inbound message: Thank you for calling the AIM Institute. We are delighted to help you address your students' literacy needs. Please hold for the next available literacy coach.
3. **2-way text messaging** is enabled within your platform and is offered as an option for any staff member. This can be turned on and off at the role-based level.
4. **Free one-to-One Video Chat** is enabled and can be used by staff. This option has limited features.
5. **Zoom integration** is coming soon. This will allow your users to connect automatically to their own Zoom accounts.
6. **My Profile** will allow you to upload a picture and personal content.

# Current users setup in AIM Production

Admin User: [jstar@aimpa.org](mailto:jstar@aimpa.org)

Admin User: Sandy SchroederTest = sandys@reframesolutions.com

# Steps for Onboarding and Configuring your data:

1. [jstar@aimpa.org](mailto:jstar@aimpa.org) – you will receive an email to "verify" your account to log in and create a password. Please check your spam if you do not receive the email.

## Configuration

1. Start by creating your branded content by going to the Configuration Screen.
2. Upload company Image
3. Create an Agency Title, e.g., the most common is a company name (Public facing)
4. Create a Description of your organization (public facing)
5. Confirmation email message – add a header to your email confirmations to your customers.
6. Email Footer – Add a footer to your email messages, e.g., your logo and contact info.
7. Turn on email reminders.
8. Customize your reminder Email Text.
9. Customize your public screen acknowledgment Text.
10. ALWAYS select SAVE when making any edits or changes to your Configuration Page.
11. Enable Public Booking allows you to turn the page on or off at any time for booking service.
12. The system offers standard messaging for email and text confirmations until you are ready to customize to your specific content.

## Accounts

1. **Roles** – Set up your roles. You can customize your roles by user group and naming them. The roles section will allow you to "check" the features and functions you would like that staff member to have access to. This will need to be completed before you add staff members.
2. **Add staff** members and create a follow-up email to your staff; an email is coming to “verify” their account, log in, and create a password. Stating that the email may be in their junk or clutter would be helpful.
3. **Add your Locations** first before adding your departments and appointment types. The workflow of adding departments and appointment types will guide you through the process.
4. **Additional fields**, e.g., check box or free form field. This is an optional feature, and it allows you to configure your own checkbox or free-form field on the public-facing page. E.g., capturing additional information from your customers or having them agree to terms and conditions, etc.
5. **Tenant** – Here is where you can add additional Tenants OR locations you wish to have their own instance of your Organizational level platform. Please follow the startup steps separately for these Tenants as they are added.

## Slots

1. Click the add slots button at the top right of the Slots page.
2. Think about how you want to offer your slots to customers, either Group or individually.
3. Follow the steps on the setup popup to create your slots.
   1. Title – The Public will see and be able to Search on
   2. Location – the public will be able to select
   3. Department, Engagement Type – these should be prepopulated in the Accounts section and easily clickable to select here.
   4. Dates, time, duration, number of people who can book the same time, meeting type, e.g., Video, and your selected days.
   5. Schedule!

## Sharing Calendar and viewing appointments

1. Once your slots are created, by clicking on the "ribbon icon" next to the bell alerts icon, it will give you the option to:
   1. Share your link for your personal calendar (just you)
   2. Share your link for your organization calendar (Group slots) also works like round robin when the public is booking.
   3. Share your link down to the department and appointment type level.
   4. Once an appointment is booked by the public, it will automatically go to your calendar and engagements screens section of the platform.
   5. You can automatically join a call from here if a video call is scheduled by clicking on the calendar option appointment.
   6. By selecting an appointment via the engagement screen, you can go directly to the Customer Record to carry out your appointment details, etc.

## Engage Talk

1. Once your users are set up in the system, you will all be able to send internal chat messages, e.g., individual or Group chats.

## Channels and Outlook and Gmail Integration

1. You can connect your Gmail and Outlook calendars by either logging in directly with Google or Outlook. You will need your Google or Outlook credentials to log in.
2. You may also add your Gmail or Outlook Mail under the Channel section of the platform. Simply click the "+" next to either Google or Outlook to integrate your email.

## Notifications and Alerts

1. The public will receive 2 notifications when an appointment has been booked.
   1. Email notifications – you can customize the header and footer in the configuration screen.
   2. SMS Text notifications
   3. The public can join their meeting, cancel, and reschedule appointments.

## Customers

1. The system offers a CRM-lite section. When an appointment is scheduled, it will automatically create a customer record where all your notes, transactions, calls, etc., will be stored for your customer. You can connect directly with your customer from the CRM without any appointment.
2. You can create new customers.

## Engagements

1. The Engagements section of the application will allow you to manually assign an appointment to another staff member if needed. You can search by assign or unassign appointments. Here you can complete your engagements, edit or cancel.

This Onboarding and brief training document will continue to be updated by ReFrame Solutions.