ZEBU CONNECT™

Quick Start Guide

Version 1.0.0
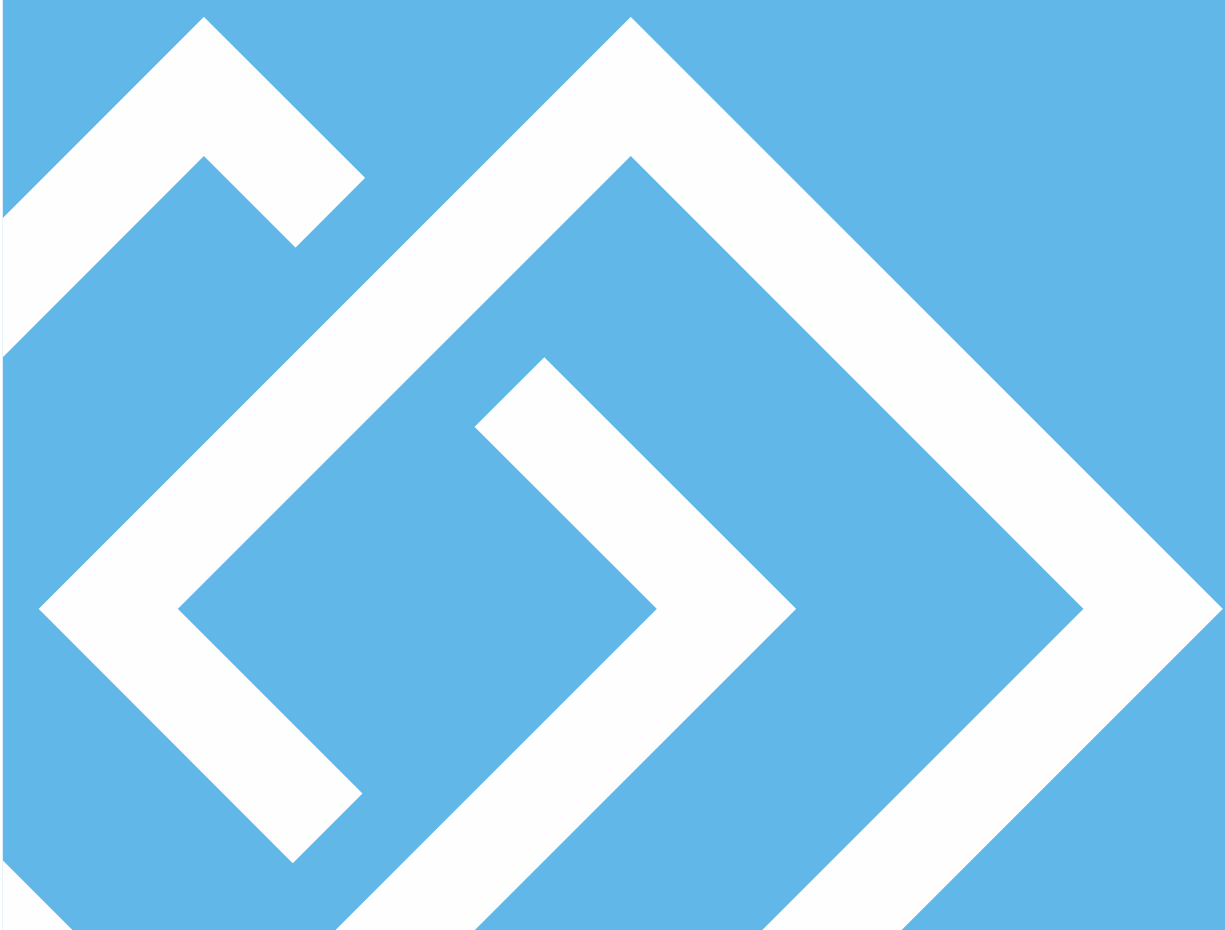
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WHAT IS CONNECT?

Connect is a powerful communication platform that will allow you to deliver more! It is also our first module that we at Zebu are developing for you. We are working to intelligently connect customers and improve productivity. Zebu enables small to medium sized enterprises (SME) across multiple goods and services industries to maximize results!

1. SETTING UP YOUR ACCOUNT

A. CREATING ORGANIZATION
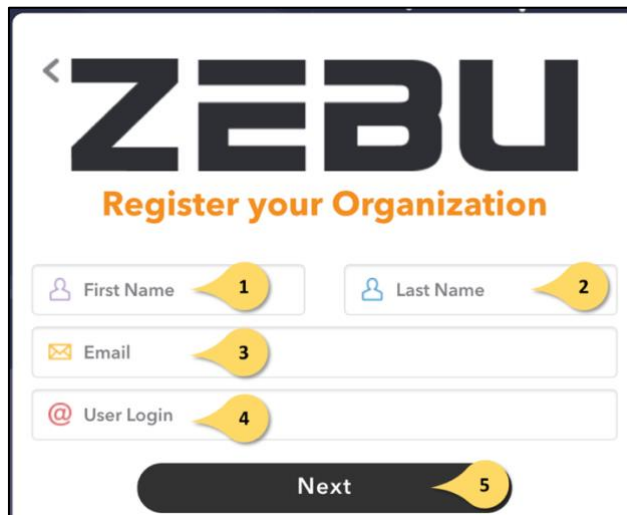
Go to signup.zebu.io and click on **Register Organization**.
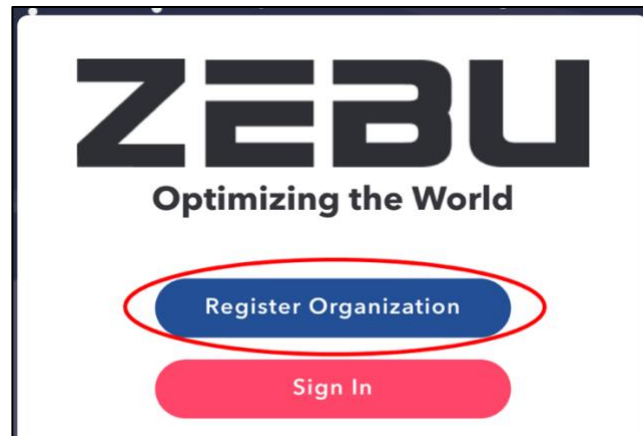
Type in your **Organization name** to create your domain**.** Click on **Next** to proceed.
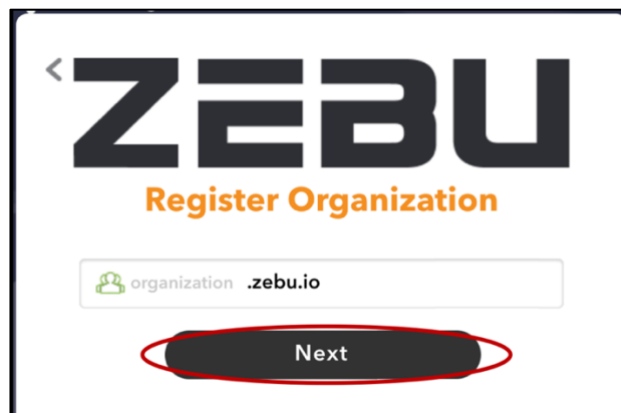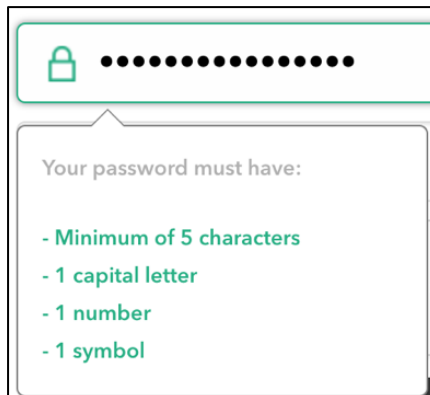
1. On the new screen, type your **First Name.**

2. Type your **Last Name**.

3. Enter your **Email.**

4. Choose a **User Login**, which will be used for login and it's also how other users will mention you on a conversation. You can also change it later on your settings.

5. Click on **Next** to proceed.
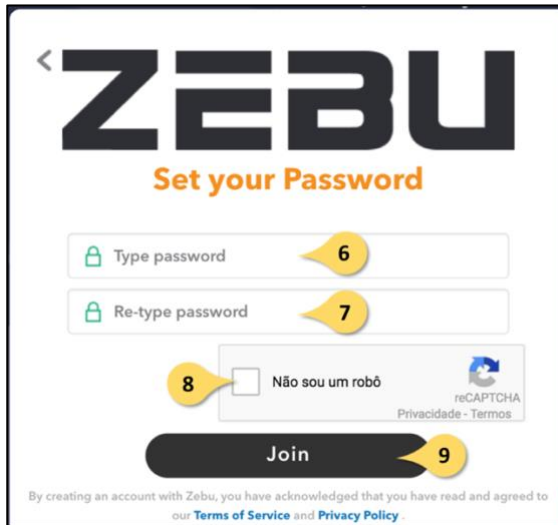
6. On the new screen, type your **Password**. Make sure to meet the criteria as the following. Then **Re-type** your password.

7. Click on the **reCAPTCHA** to ensure that you are not a robot. The system might require you to do a quick test in which you will have to select pictures in which certain objects are located.

8. Click on **Join** to Create your organization, and a confirmation email will be sent to you.

B. INVITING USERS

If you do not have your coworkers on Connect yet, administrators can send invites so new users can create accounts.

How to invite users to Zebu:
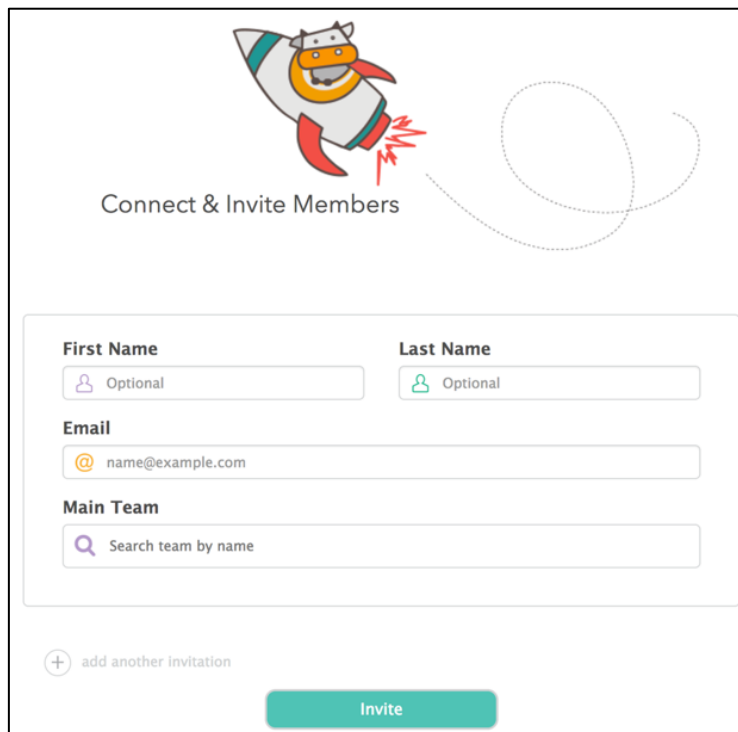
1. Access the right-side menu by clicking on the dots on the right corner of any chat.

2. On the right-side menu, click on the **Team** tab and then on the **plus** button.
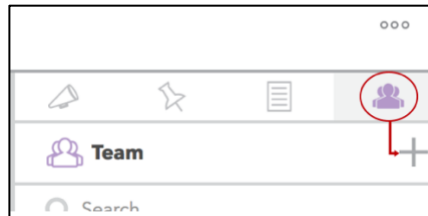
3. The invitation board will open, and you will be able to fill up the user information.

Connect & Invite Members

First Name
Optional

Last Name
Optional

Email
name@example.com

Main Team
Search team by name

(+) add another invitation

Invite

4. On the **Main Team** section, a list picker will drop down so you can easily choose the team you want to invite that member for.

Main Team

🔍 zebu

Zebu

5. For multiple invites, just click on ⊕ add another invitation and another board will be opened.

⊖ remove this invitation

First Name   **Last Name**
👤 Optional   👤 Optional
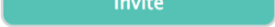
Email
@ name@example.com

Main Team
🔍 Search team by name

6. Whenever you are ready to send the invites just click on **Invite** and a confirmation screen will appear to finish the action. To dismiss it just click on **OK**.

You have successfully invited your new team member! An email has been sent!

OK
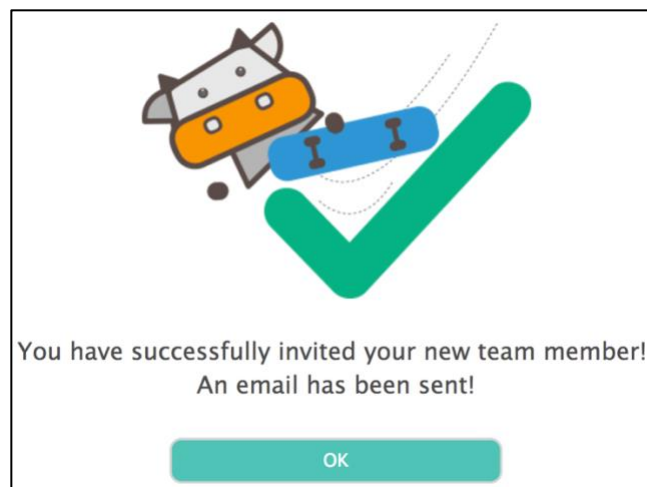
C. ACCEPTING INVITE

The invitation to join ZEBU Connect will be sent to you by email. To accept the invite, click on **ZEBU Connect** that will redirect you to the create an account page.
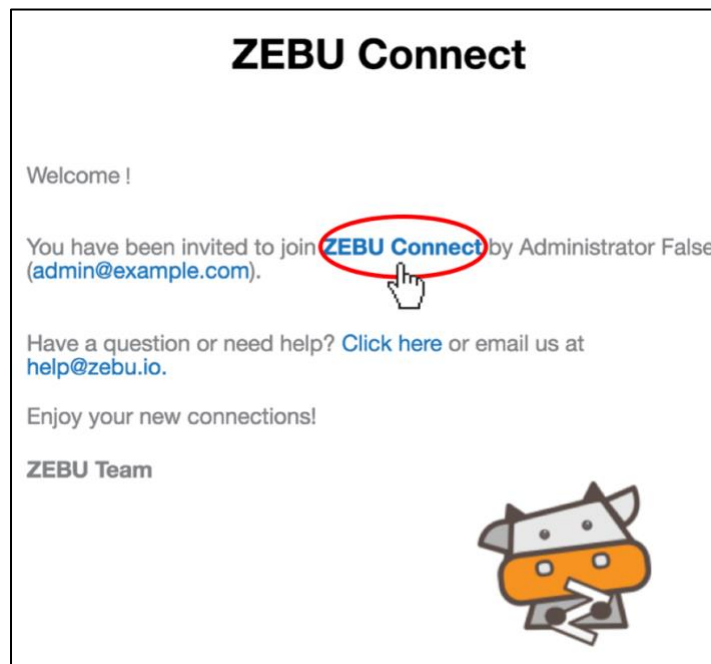
D. CREATING ACCOUNT
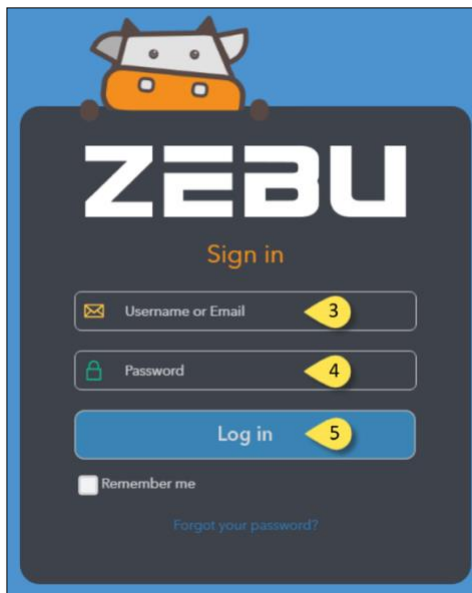
Once you receive the email, click the **JOIN ORGANIZATION** button.

1. Enter your **organization** domain name.

2. Click **Next** to proceed.

3. Enter the **Email** that was used to create the account.

4. Type in your **Password** and click **Log in.**

5. The Connect app will open.

E.   SIGN IN TO CONNECT

If you do not yet have a Connect user account, request one from the system administrator and follow the Create an account procedure to set one up.

Signing in on Connect:

1. Open the ZEBU app.

2. Enter the domain name for your organization and click **Next**.

3. Enter the **Username** you created in your profile or the **Email** that was used to create the account.

4. Type in your **Password** and click **Log in**.
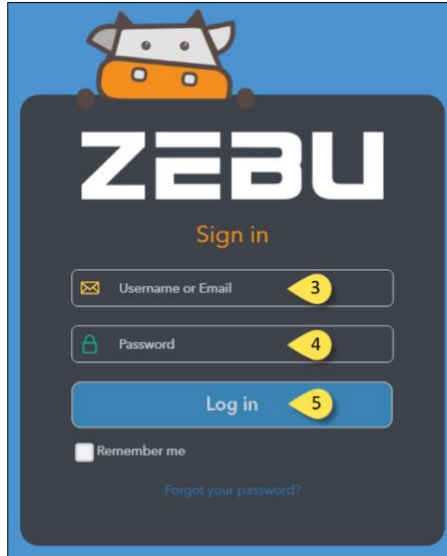
5. The ZEBU Connect app will open on the last conversation that was active.

2.   FIRST STEPS USING CONNECT

Connect provides a variety of ways to communicate with your team. You can divide your organization in Teams in which is used to better organize coworkers that are working on a same area/project within your organization.

Inside a team, you can create Channels which are used to discuss a specific topic/area on your project. Channels can be public of private.

You can also chat directly through a Private Chat to communicate between two peers, and no one else can have access to.

Groups is another way to communicate between coworkers, behaving and carrying the same functionalities from private chats, but with the possibility to add more people to it.

Connect All is a default chat that everyone is part of, where important announcements are broadcasted to the whole company.

Columns is multi-chat view where you can have access and manage up to 4 chats at a time.

External Channels is also a very important feature in Connect. Externals allows you to invite users out of your office like partners, suppliers, clients and any other important stakeholders in your business to easily communicate with your office, in an efficient and highly secure way.

On the following topics we will be explaining how to setup and start using all the most of Connect.

A. LEFT BAR FUNCTIONS

Starting with the basics! Connect's left bar is Responsible to all the app's navigation control, it organizes all your chats, and all will also host our upcoming modules. Here are the basics functions you need to know to start off using Connect!

How the Left Bar is structured:
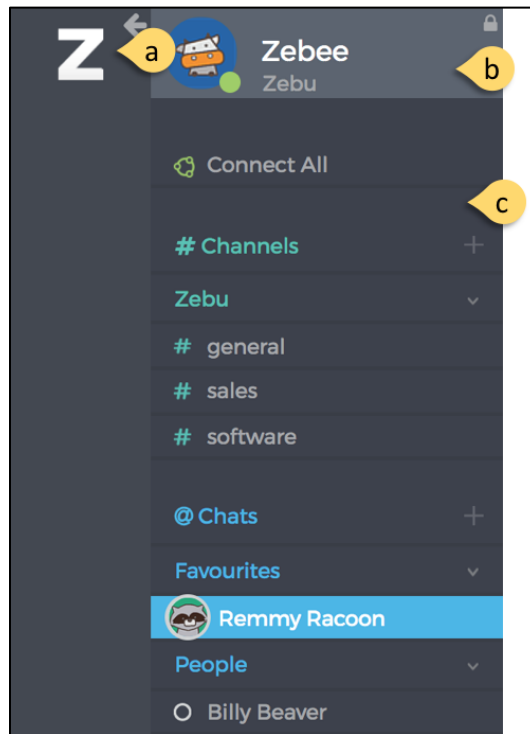
a. Zebu's left menu: here is where our add-ons will be located. The user can make more room by hiding the whole left menu by clicking on the Zebu's logo.

b. User tag: here we display your Name, your Team and Status. It also hides some settings that can be shown by clicking on it.

c. Chats: Here all your communication will be located. Connect organizes your chats by categories.

Accessing hidden features:
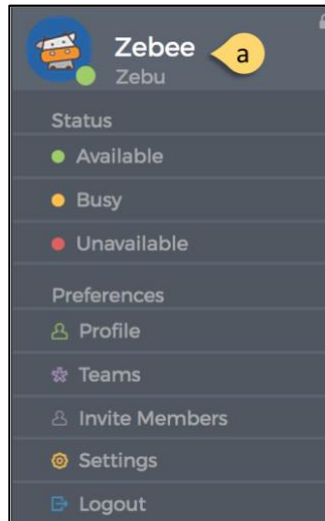
a. The user can change status and preferences by clicking on the user tag. A list will immediately roll down, making it possible to access these features that are hidden. Make sure to understand how each status work on Connect Availability and how Settings work.

Chat tabs:

a. Chat Category: On Connect there are 3 different types of chats, and they are Channels, Chats and Externals.

b. Add Chat: By clicking on this + you can either join a preexisting chat or create a new one.

c. Team Name: This identifies from which Team a chat is part of.

d. Hide: This button collapses the list of chats. Clicking on it again (this time it will be facing upwards) will expand the list.

e. Chat name: This identifies each chat.

If you hover over any chat, it will be highlighted in blue, and other features will appear, and they are:
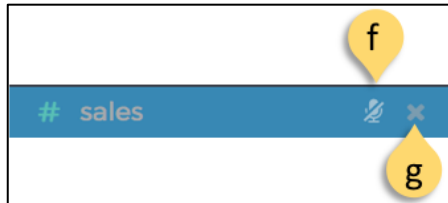
f.   Mute: This button mutes any notifications from this chat.

g. Leave Channel: This button deletes the chat from your list only, and you will no longer be part of it. If you need to join back, just use the + button mentioned on item b.

B.   JOIN/CREATE A CONNECT TEAM

You can join any of the existing Connect teams or you can create a new one. Teams are generally created for a group of people working in the same area or on the same project.

How to join an existing team:

1. Click on your name in the top left corner of the app.
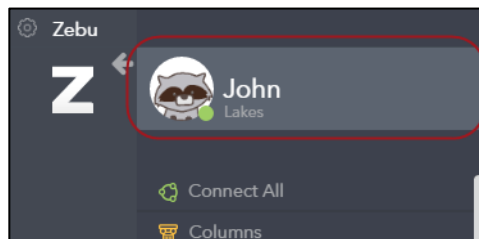
2. Select **Teams** under **Preferences.**
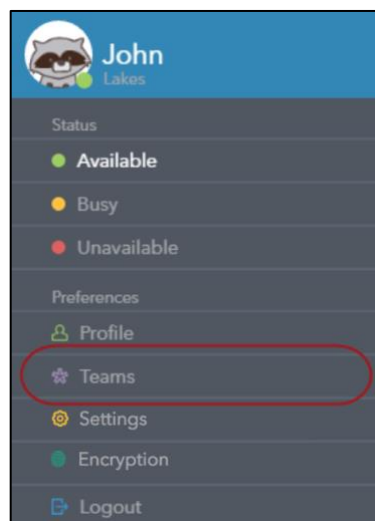
3. Select the team from the list of available ones and click .

How to create a team:

1. Click on your name in the top left corner of the app.
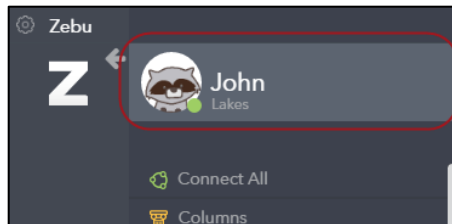
2. Select **Teams** under **Preferences.**
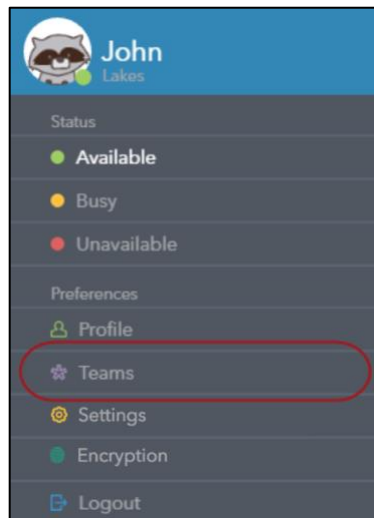
3. Click [Create Team] button.

4. In the top panel type in the team **Name** and **Description**.

Teams are the way you organize your company. They're best when organized around departments - for example, *marketing, *sales

\# Name

? Description

5. In the bottom panel select the team members from the list of registered users.

Users

Q Filter...

Administrator +

Rafael +

Leo +

0 items selected   Remove All

6. To include a user in the team, highlight them and click ✛ .

7. You can remove a user from the team at any time by highlighting them and clicking ▬ .

8. Click **Remove All** to clear all users from the selected list.

9. When you are finished selecting the team members, click **Join** to create the team.

C. CHATS AND CHANNELS

Channels are designed to unite your colleagues for a specific purpose, as organizations are separated into departments. They are unlimited and can be created to discuss any topic. Channels can be set up to be public or private, based on the purpose.

Chats are one-on-one or group discussions between users. You can create a group from any combination of registered users.

First steps using Chats and Channels:

Moving the mouse pointer over a channel/group/user name will highlight it and allow you to:

- **Mute this conversation:** Disables visual and audible notifications of new messages.
- **Leave this channel:** Removes the conversation from your list.

The / icon indicates whether the channel is private (locked) or public *(channels only)*.

At the top of each channel/group is an information bar with the following options *(some options may not be available, based on channel type)*:
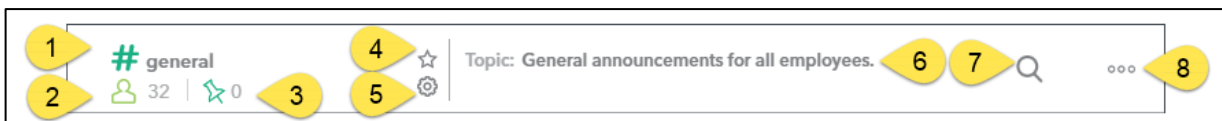
1. **Channel/group name**
2. **Members:** Number of members in the channel.
3. **Pins:** Number of messages in this conversation that you've pinned.
4. **Favorite:** If the star is yellow, the channel will appear in the **Favorites** section of channels/groups. Click the star to change this setting.
5. **Settings:** Click this icon to open and edit the channel settings.
6. **Topic:** Channel description.
7. **Search:** Allows you to search the discussion for a particular subject.

8. **Options menu:** Review the mentions, pins, files, and team.

D. HOW TO CREATE A CHANNEL

Public channels are visible to anyone and are available for anyone to join.

How to create a public channel:

1. Click the [+] button for **Channels**.

2. Click the **Create Channel** button.
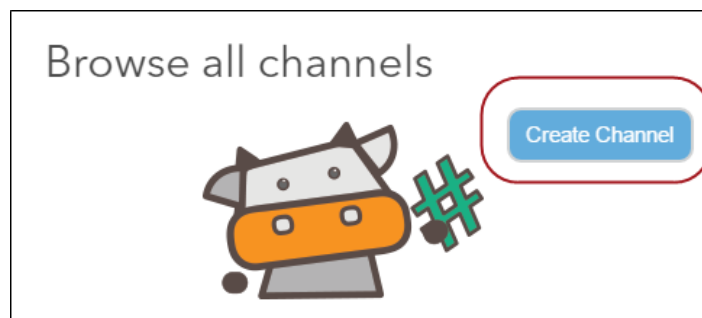
3. Type in the name for your channel. The channel will be identified by this name and it will also be used to create a mention.
4. Select from which **Team** the members for this channel will be invited.
5. Describe the **Purpose** for this channel.
6. Select the teams with which the channel will be shared.

7. Use the **Invite Members** panel to pick the users for the channel. The list of available users depends on the **Team** selected in the panel above.

8. The **Additional Options** allow you to customize accessibility and content availability for the channel.

   - **Private:** Enable this option to make it so that users can only join after being invited.

   - **Disable styling bar:** Enabling this option will disable the style options bar for message text.

   - **Disable gifs:** Enabling this option will not allow GIFs to be used in the channel.

   - **Disable reactions:** Enabling this option will not allow users to react to messages.

9. Click to create the channel.

NOTE	Users can edit the Channel settings at any time.

E.   HOW TO JOIN A PUBLIC CHANNEL

You can join any public channel that has been created either by you or another member of your organization. Once you join a channel you have access to all message history within that channel.

How to join a public channel:

1. Click the [+] button for **Channels**.

Channels   →   +

2. A list of available channels is loaded. Highlight the one you wish to join.

3. Click [Join] button to join the channel.

F.   HOW TO CREATE A PRIVATE CHAT
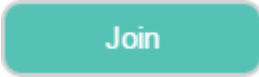
Private chats are one-on-one discussions with any of the team members. Once a private chat has been created, you cannot add members to it. To create a multi-person chat you will need to create a separate group discussion.

How to create a private chat:

1. Click the [+] button for **Chats**.

@ Chats   →   +

2. A list of available team members is loaded. Highlight the member you want to chat with.

3. Click [Join] button.

You can only have one private conversation with any one team member. The chat history does not get erased - if you leave the conversation for any reason by clicking the [×] button, and then later create a private chat with the same person, all the previous messages will still be accessible.

G. HOW TO CREATE A GROUP (MULTI-PERSON CHAT)
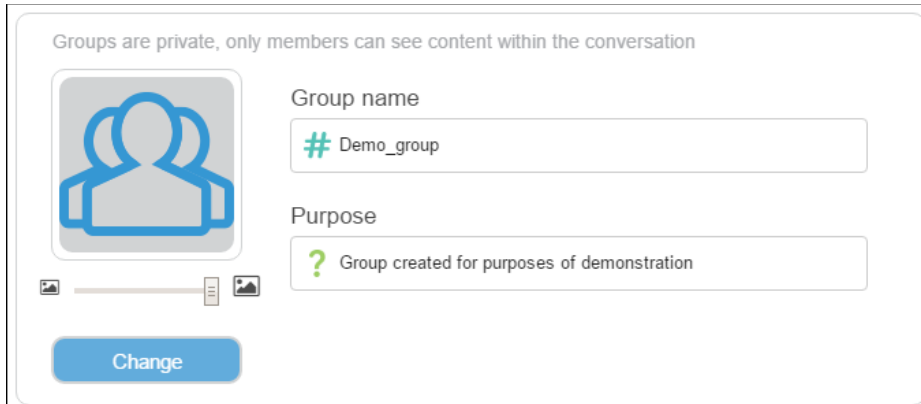
A group is a chat between 3 or more users. It is private and cannot be viewed by any user who is not in the group.

How to create a group chat:

1. Click the ⊞ button for **Chats**.

2. Click Create Group button.

3. Type in the name of the group.
4. Type in the purpose of the group *(optional)*.
5. Add a profile image *(optional)*.

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6. Use the **Invite Members** panel to select the team members, who will be part of the group. If you are having trouble finding a particular person, use the **Filter...** field and start typing the name of that user. As you type, the list will be progressively refined to only display users with names that fit the filter term.

7. Once you have found the team member you wish to add to the group, click on the ✚ button to add them to the list of selected users.

8. Use the **Additional Options** panel to customize accessibility and content availability for the channel.

   • **Disable styling bar:** Enabling this option will disable the style options bar for message text.

   • **Disable gifs:** Enabling this option will not allow GIFs to be used in this group.

   • **Disable reactions:** Enabling this option will no allow users to react to messages.

9. Click to create the group chat.

H. USING CONNECT ALL

Connect All is a way to easily message all the members of your organization across different teams. Click on **Connect All** and a regular chat will appear, with all the members.
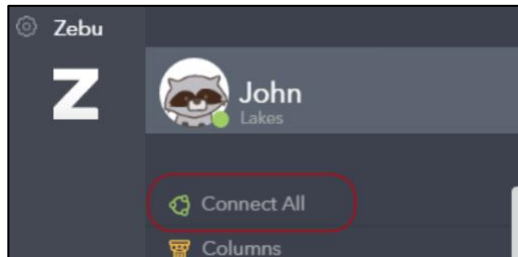
Connect All is a default Chat that has all the features from a regular Channel. It contains all the members in your organization and users can't leave it. It is a powerful tool for your business communication.

I. USING EXTERNALS
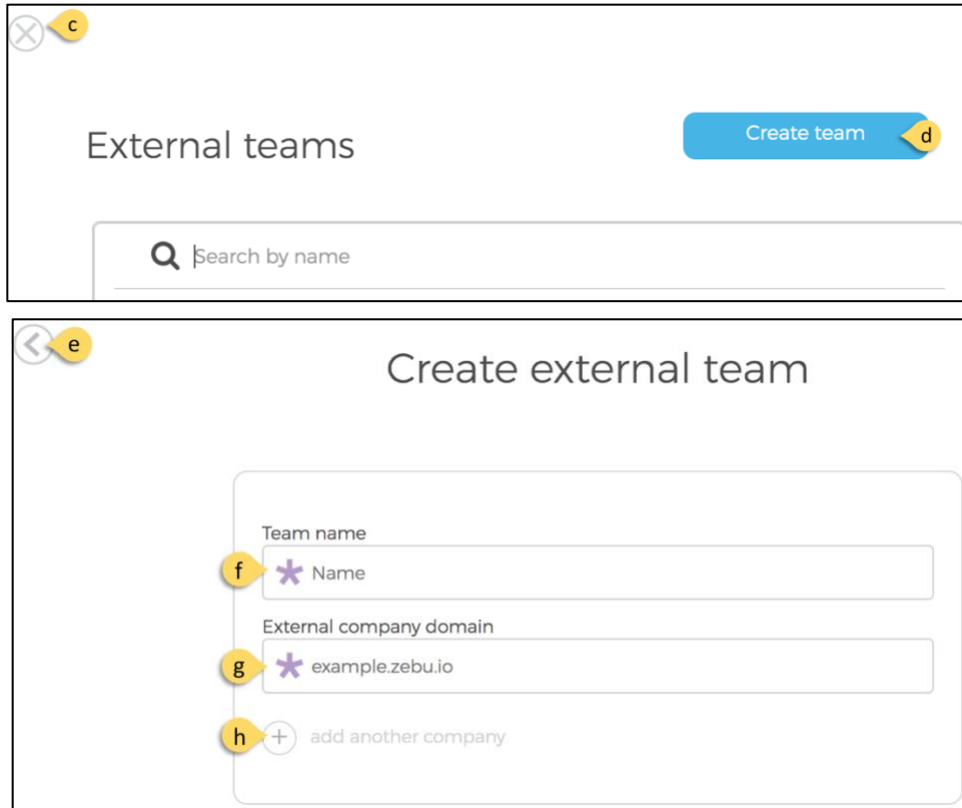
Externals allow users to communicate outside the organization. This is useful specially when a company is frequently contacting clients, partners, suppliers and any other role that is essential for your business but doesn't need to be part of your internal team and might not even be strategic to have access to your internal communications.

How to set up an External channel:

  a. On the left side menu, click your name tab to open the hidden menu.

  b. Click on External Teams to open the External Teams Panel.
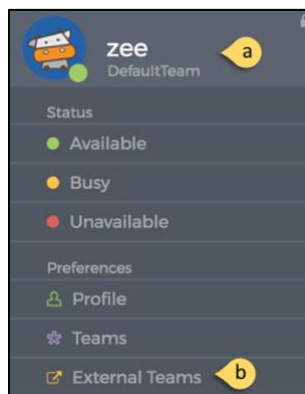
c. Click on the "**X**" to close the panel in case you've changed your mind.

d. Click on Create team to start creating your External.

e. Back button will bring you to the previous screen.

f. Choose the Team Name for your External.

g. Add here the **External Company Connect's domain**, so an invite can be sent to the admin of that organization.

h. If needed, click on the "**+**" to add another external company to this Team.
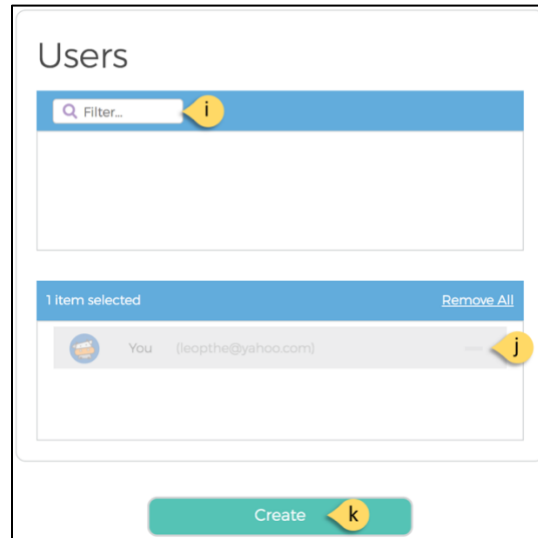
i. You can invite users from your organization to join this team

j. The users that were added to the external team can be removed from the Channel by clicking on the "**–**" button.

k. Once you are ready to go, click on Create and the External team will be created between the two organizations.

How to accept an External invite:

a. Once you receive an invite, it will be shown as a notification on your name banner. Click on it so the hidden menu can appear.

b. Click on External Teams to open the External Teams Panel.

c. All your externals will be shown on the External Panel. Including your invitations. Click on Accept to proceed. You can also Decline if needed.
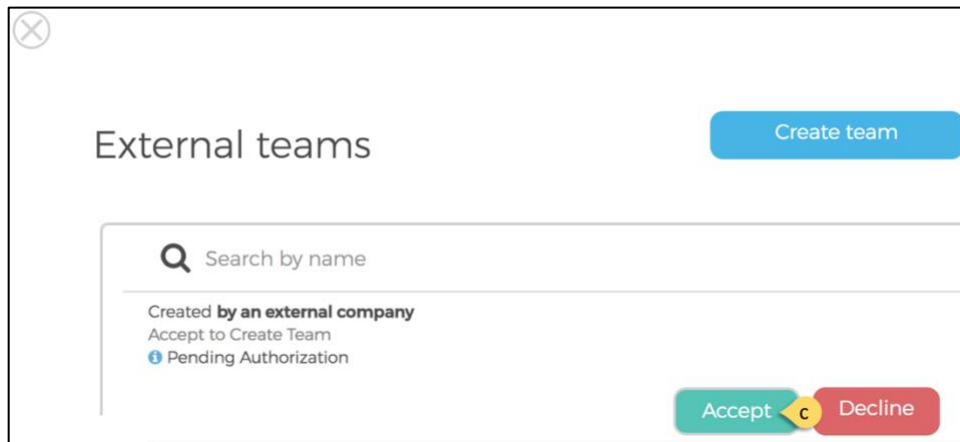
d. When accepting, a popup will appear in which the user will need to enter a name for a new channel name to link with the external organization.
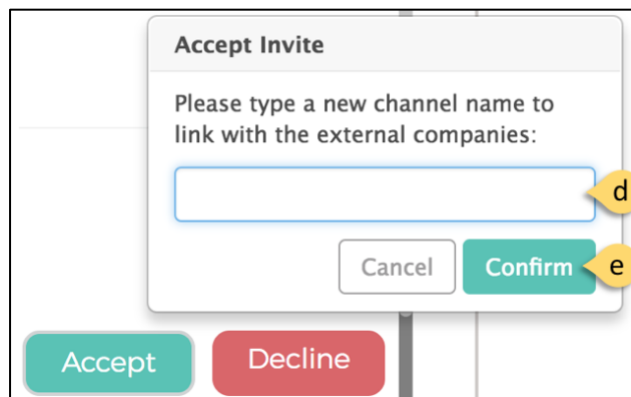
e. Once the name is chosen and typed in the composer, click on confirm to finish the action.
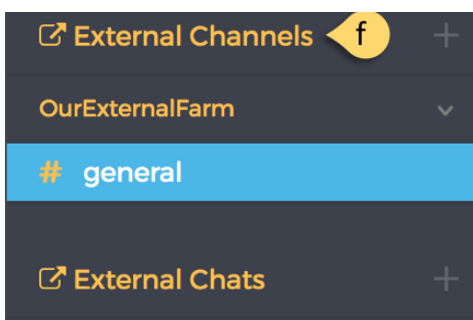
f. Your Externals will be now available on the left side menu of your screen under a new section named **External Channels**.

J.   COLUMNS - HOW TO CREATE AND EDIT A MULTI-CHAT VIEW

The **Columns** view allows you to keep track of up to four discussions on the same screen. Using **Columns** you can create any combination of channels, groups, and private chats you wish.

NOTE	The content of different discussions will not be shared between the channels that are added to the view.

How to create a Column view:

1. Select the **Columns** section from the list of channels.

2. If you do not have any column views, you will be greeted by a Welcome! screen. Click Get Started button.

3. Select up to four discussions to display in the panel.

4. Start typing the name of the channel/group/user and the list will be progressively refined to display only selections that contain the search term.

5. Select the channel/group/user you want to display.

6. Use the **Color** menu to select the header color for column.

7. If you want to add another channel, click ⊕ add another and repeat the above steps.

8. Type in the name for the columns view.

9. Click **Create** button.

10. Each column with have a top bar with the chosen color and the chat information displayed. By clicking on the white arrow, the user is redirected to the chat.
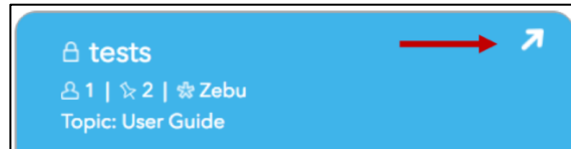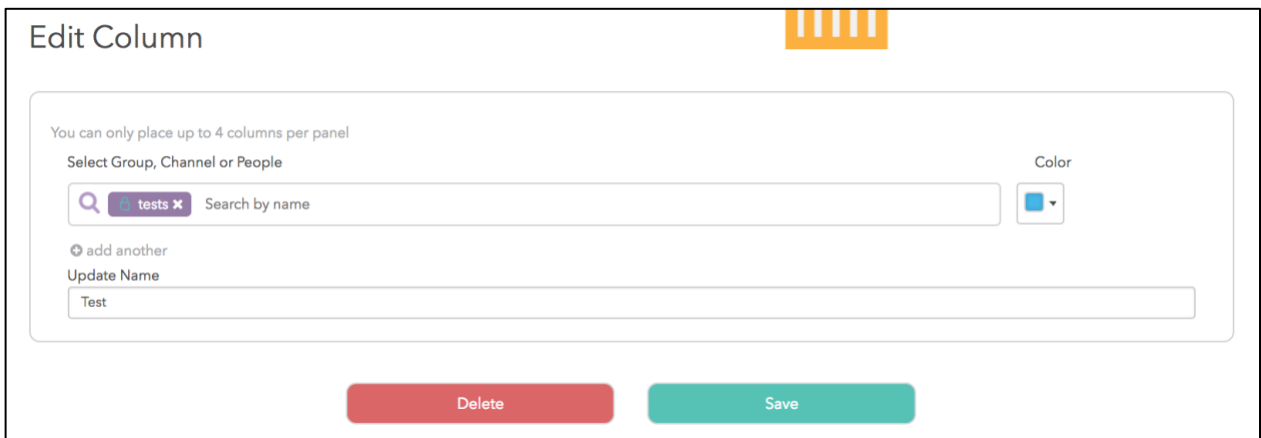
How to edit a Column view:

1. Click on the **gear** on the top right corner of the columns view.

2. Now you can Add (in case less than 4 columns) and remove columns, update name of the panel and change the color of each column.

3. Click on **Delete** to erase the panel or **Save** to go to the column view.

K.   SETTING UP WEBHOOKS

Complementing all Connect Feature's, Webhooks can power up your Channels! If you and your coworkers are using external apps, you can create a Webhook which will work as a bot for you channel, feeding it with updates such as a new upload, a task that was finished, deadlines and so on...

How to create a Webhook:
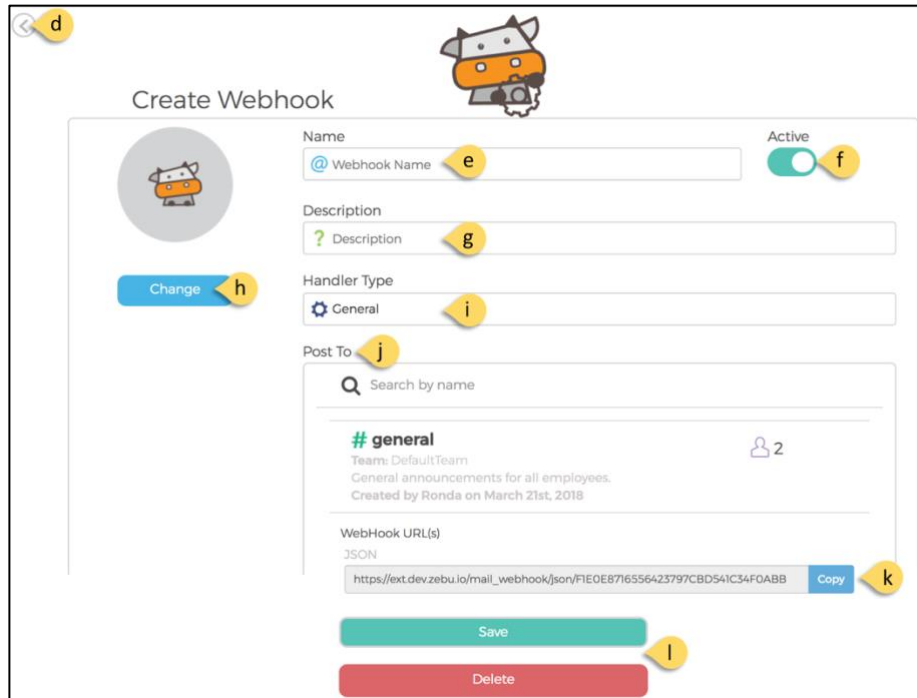
    a. Click on your name banner so the hidden menu can appear.
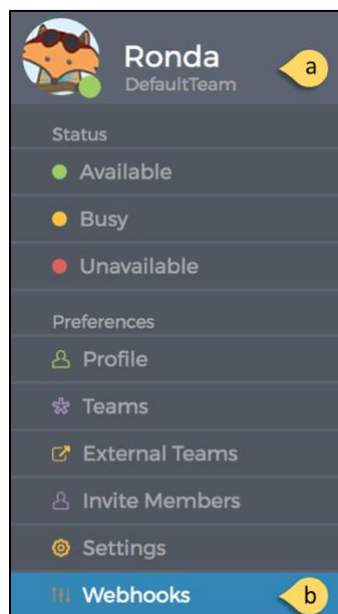
    b. Click on **Webhooks** to open the its Panel.

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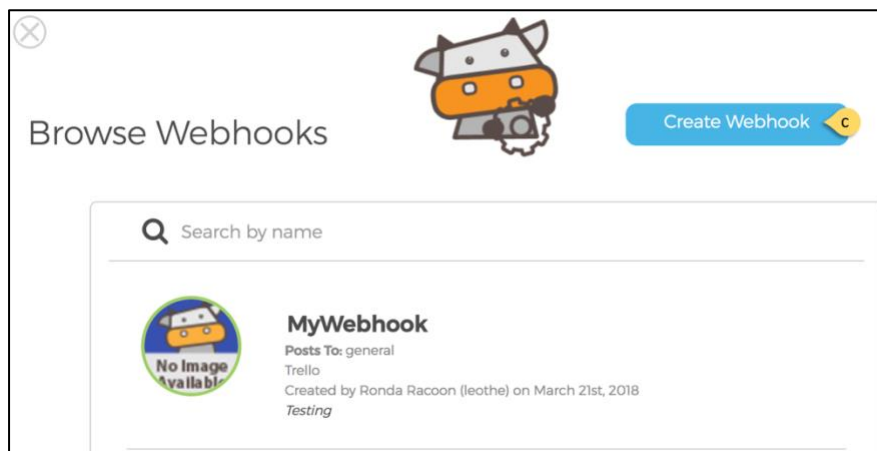
c. The panel will appear where you can find and manage all your Webhooks. To create a new on click on **Create Webhook**.

d. Click on the **Back** button to return to the Webhook panel.

e. Add a name to your Webhook on the **Name** field.

f. Set your Webhook active by turning this switch on.

g. Add a Description to your Webhook so other users can easily understand what this Webhook is up to.

h. Add a profile picture to your Webhook by clicking on the **Change** button. You can also leave it with the default picture.

i. Choose the type of Handler to your Webhook. By clicking on this composer, a list will drop down so you can choose from our selection of Handlers.

j. Choose where your Webhook will be posting on. You can select from the list or filter by typing in the name of the Channel(s) you are looking for.

k. A link will be generated so you can easily click on **Copy** to then paste it on your external service, so it can feed it with data.

l. Once you've finished filling all the information on your Webhook, you can **Save** it so it can start working or you can just Delete if it's no longer necessary.

3.   MESSAGES

A.   MESSAGE BASICS

At the bottom of every conversation there is a text box where you type your messages.
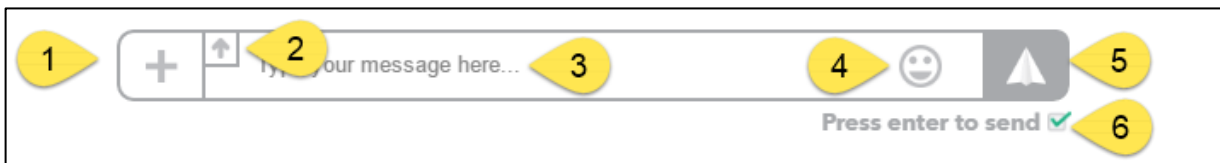
1. **Add item:** allows you to attach a file, create a poll, or add a code snippet.
2. **Show/hide Style bar:** allows you to show/hide text formatting tools.
3. **Message window:** type the text of your message in this window.
4. **Emoji/GIF:** click to add an emoji or an animated GIF to your message.
5. **Send:** click to send your message.
6. **Press enter to send:** checking this box will send the typed message when the **Enter** key is pressed on the keyboard. You can press **Shift+Enter** to add another line to your message without sending it. If this box is unchecked, pressing **Enter** on the keyboard will add a new line to your message and you will need to click the [icon] button to send your message.

Once a message is sent, you can still manipulate it. Move the mouse pointer over the message - it will be highlighted and a message options box will appear. These options allow you to do the following:

1. React to a message.
2. Comment on a message.
3. Pin a message for future reference.
4. Edit and/or delete a message (your own messages ONLY).

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5. Share a message.

B.   HOW TO FORMAT YOUR TEXT WITH THE STYLE BAR

Connect provides a few options for custom text. Users can change it's message formatting at any time by using our Style Bar. You can create lists, highlight text, change the font and more. Follow the steps below to understand how the Style Bar works.

To use the Style Bar:

a. Click on the upward facing to open the Style Bar.
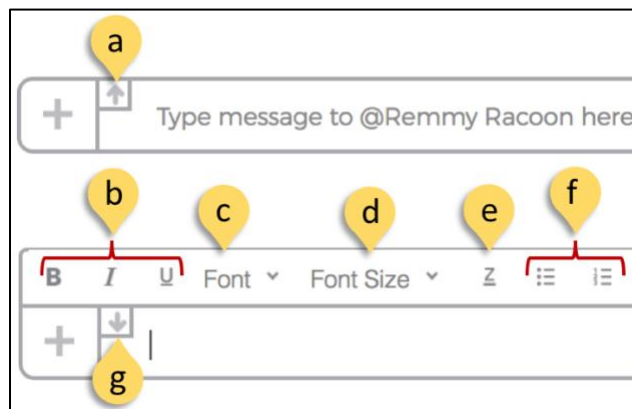
b. Our highlight options available are **Bold**, *Italic* and Underlined. To use any on your text, first click on the correspondent icon, then you can start writing. To Deactivate it, just click on the icon again or once.

c. Font directory: here you can change our default font to other 9 different styles.

d. Font Size: here you can adjust your font size up to 6 times the original font size.

e. Font Color: Here you can change your font's color to a variety of different colors.

f. Lists: with this option you can create lists with either bullet points or numerals.

g. Hit the Downward facing arrow to hide the Style Bar.

NOTE	Once you have finished, you can send your text and the composer will set to its original configuration.

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C.   HOW TO ADD AN EMOJI

A picture is worth a thousand words and you can use an emoji/emoticon to jazz up your messages and convey things that words can't.

To add an emoji:

1. Click the icon in the message bar.
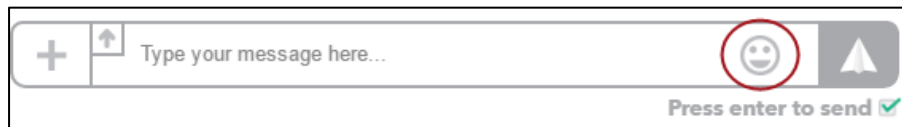
2. In the panel that opens, select the **Emoji** tab.
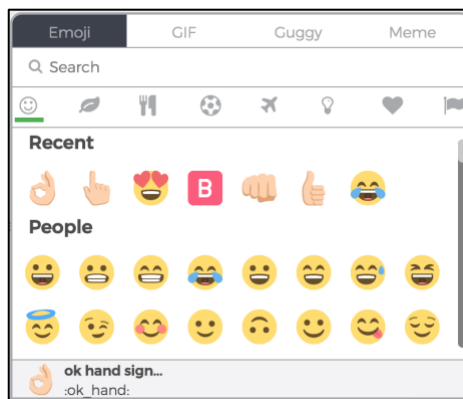
3. Browse the emoji's until you find the one the fits your message and select it. The emoji's are broken down into categories listed at the top. First category contains all available emoji's and subsequent categories sort them (somewhat) by subject.

4. Continue with your message as you normally would. As you use the emoji's, you will build up your own personal library of the ones you've recently used. This way the ones you use frequently will always be on hand.
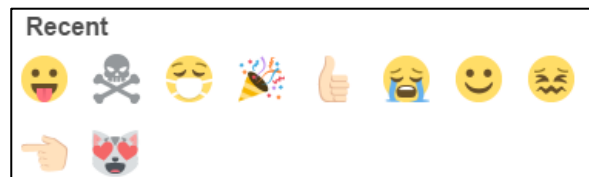
D.   HOW TO ADD A GIF

Sometimes using a still emoji is just not enough. In this case you have a whole library of animated GIFs at your disposal.

To add a GIF:

1. Click the icon in the message bar.
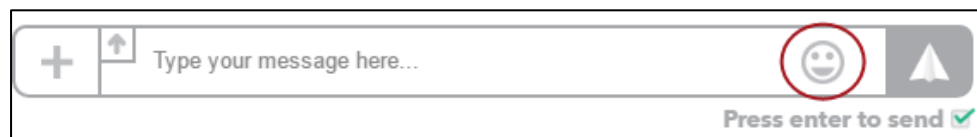
2. In the panel that opens, select the **GIF** tab.
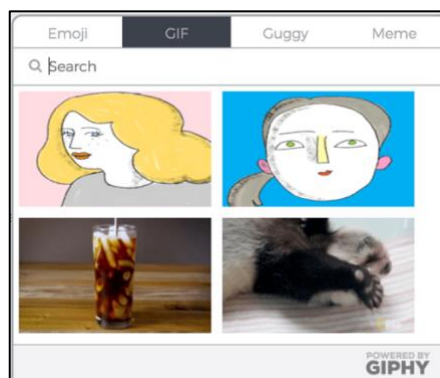
3. Type a search term in the **Search** bar and you will have a selection of GIFs that are best suited to choose from.
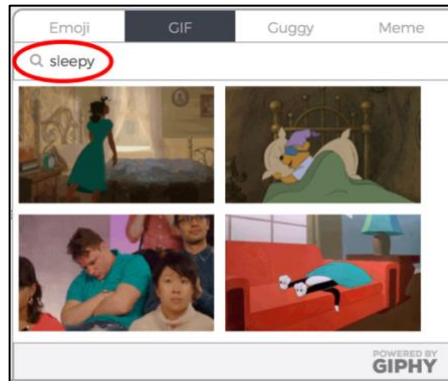
4. Select a GIF from the list or refine your search for more options. Clicking on a GIF will automatically add it to your message.

5. Once you've found the perfect GIF to convey your message, you can send it as is, or add a text in the message bar.

E.   HOW TO CREATE A GUGGY

GUGGY's allow you to find GIFs that will better describe the situation you want to talk about and will also add captions to it.

To create a GUGGY:

1. Click the icon in the message bar.
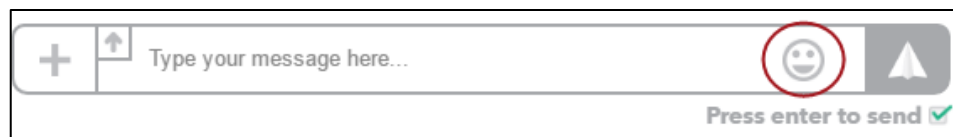
2. In the panel that opens, select the **GUGGY** tab.
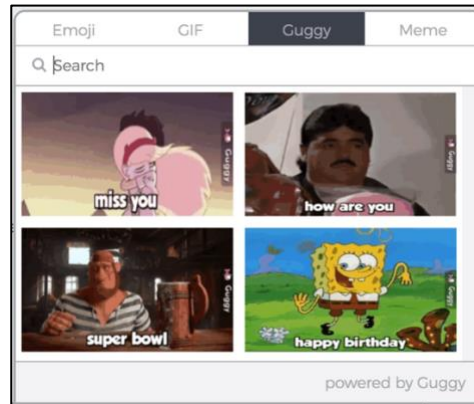
3. Type a search term in the **Search** bar and you will have a selection of GUGGYs that are best suited to choose from.
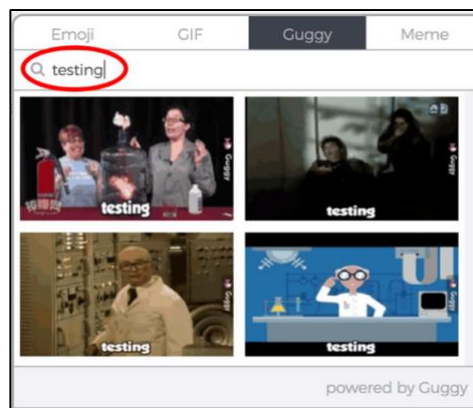
4. Select a GUGGY from the list or retype the topic of search for more options. Clicking on a GUGGY will automatically add it to your composer.

5. Once on your composer, you can send it as it is, or add a text in the message bar to send with.

F.   HOW TO CREATE A MEME

If you want to add a touch of fun to your chats you can also create your own meme.

To create a MEME:

1. Click the icon in the message bar.

2. In the panel that opens, select the **MEME** tab.
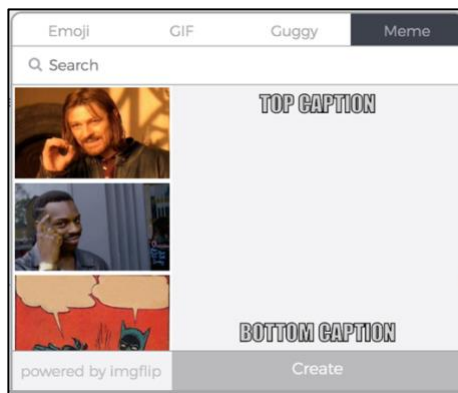
3. Type a keyword in the **Search** bar and you will have a selection of Meme's with that keyword.

4. Choose the one you want, and you can add top and bottom captions to it.
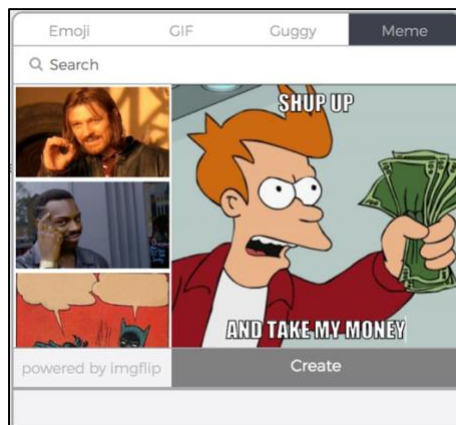
5. Once you've created your meme, click on **Create**, so it is added to your composer. You can add more text to be sent with your meme or just send it the way it is.

G. HOW TO REACT TO A MESSAGE

Some messages don't need a reply, but it is always good to let the sender know that you read it. For that, and many other purposes, you can easily send a reaction.

To react to a message:

1. Move the mouse pointer over the message, to which you want to react. The message will be highlighted and a box of message options will load.

2. Click the 😃 icon. A list of emojis will open.

3. Browse the collection of emojis and select the one that best represents your reaction.

Reactions from all users are added under the message. The reactions from other users are displayed in a white box with blue outline. Your reactions (even if they are the same as others) are displayed in blue boxes with blue outline. The number associated with each reaction indicates how many people reacted this way. Moving the mouse pointer over any particular reaction will give you a list of everyone who used this reaction.

Connect allows you to comment on any message in the discussion feed. This way you are not faced with confusion when replying to a message that was posted some time ago - a feature useful when working with people in multiple time zones and on different schedules.

To reply to a message in a Channel:

1. Move the mouse pointer over the message to which you want to reply. The message will be highlighted, and a box of message options will load.

2. Click the ☐ icon.

3. A secondary message bar will appear right beneath the original message, where you can type your reply. This message bar behaves the same as any other message bar.
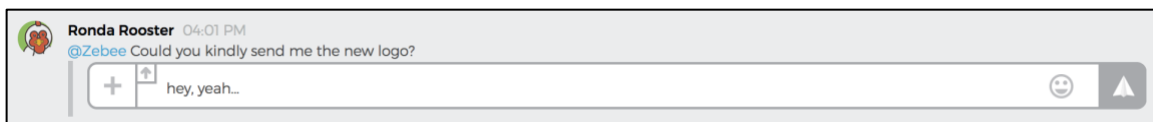
When replying to a message in a channel, a thread will be created. This means that the message will remain in the same chronological position and any comments related to that message will be displayed below it.

To reply to a message in a private Chat or Group:

1. Move the mouse pointer over the message to which you want to reply. The message will be highlighted, and a box of message options will load.

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2. Click the ⬜ icon.

3. The message bar will expand to display the message you are replying to. You can cancel the reply by clicking the in the "**X**" top right corner.
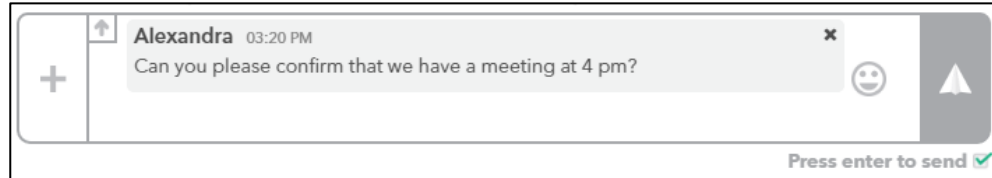
4. Type your reply and send the message. Both - the message you are replying to and your response will be displayed at the bottom of the conversation as a new message and will not be displayed as a threaded message.

I.   HOW TO PIN A MESSAGE

Whenever you receive an important message, just click on the Pin button and you will be able to check it whenever you want - this way you won't forget about anything! Your Pins are located on the right-side Menu.

How to pin a message:

1. Move the mouse pointer over the message, which you want to pin. The message will be highlighted, and a box of message options will load.

2. Click the ⚲ icon.

The pinned message will be available in the right-hand menu under **Pins**.

J.   HOW TO EDIT/DELETE A MESSAGE

Mistyped a message or sent it to the wrong person? Don't worry! You can always edit or delete a sent message from the conversation whenever you want.
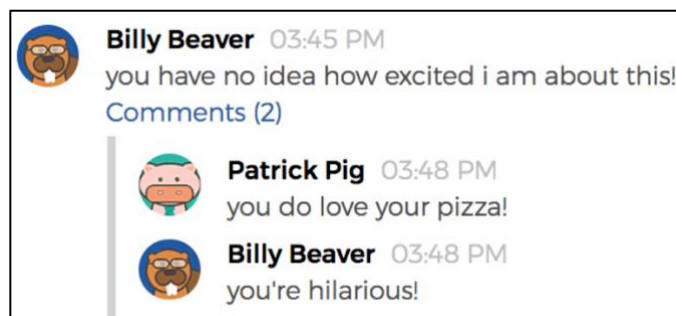
How to edit a message:

1. Move the mouse pointer over the message, which you want to edit. The message will be highlighted and a box of message options will load.

2. Click the ooo icon.

3. Select **Edit** from the mini-menu that will pop up.
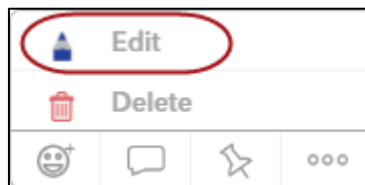
4. The message will become editable. Make the desired changes and send as you would a normal message.

5. The message will be updated, but will remain in the same position (i.e. it will not be moved to the bottom of the conversation). The time stamp on the message indicates when it was last edited.
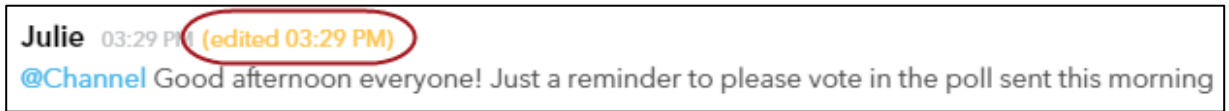
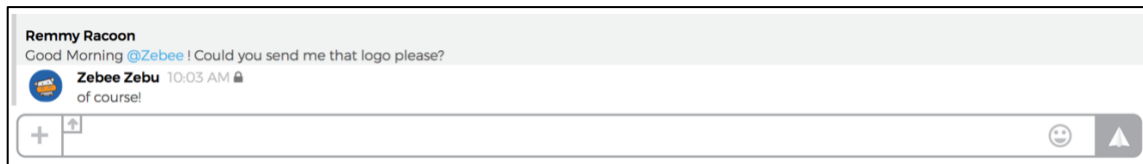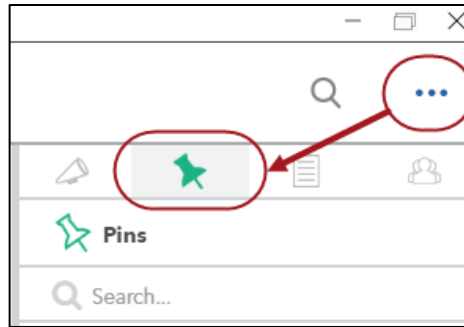## How to delete a message:

1. Move the mouse pointer over the message, which you want to delete. The message will be highlighted and a box of message options will load.

2. Click the ⚬⚬⚬ icon.

3. Select **Delete** from the mini-menu that will pop up.
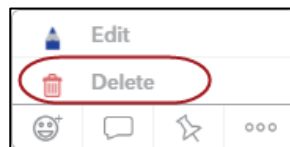
4. Select **Delete** in the confirmation message.
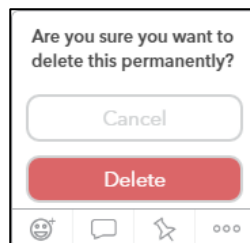
5. Even after you confirmed the deletion, Connect still gives you an opportunity to change your mind. Click **Undo** to cancel message removal, click **Ok** to confirm, or simply wait 15 seconds for the process to finish automatically.

> **This message has been deleted.**   Undo Ok

6. Once you have deleted the message, it will be shown on the thread that the message was deleted. As shown on the following picture.

> **Zebee Zebu** 10:03 AM 🔒
> Message deleted by the author.
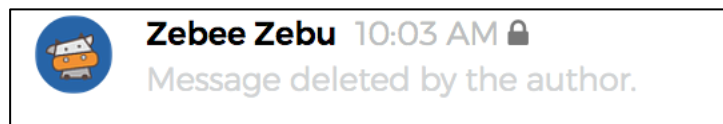
NOTE	You can only edit and delete your own messages.

K.   HOW TO SHARE A MESSAGE

Instead of describing someone's post and trying to explain where it can be found, instead **Channel** users can share any message.

How to share a message:

1. Move the mouse pointer over the message. It will be highlighted, and a box of message options will load.

2. Click the ⁰⁰⁰ icon.

3. Select **Share** from the mini-menu that will pop up.
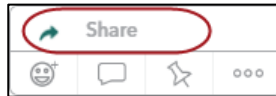
4. Select the recipient, group, or channel where you want to share the message and click **Share**.
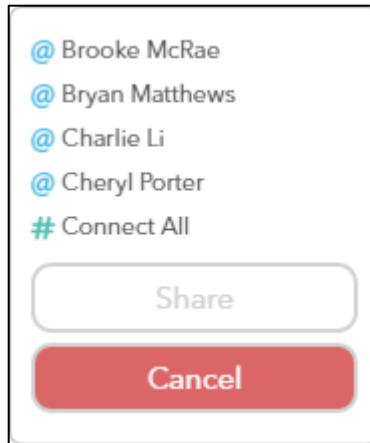
5. The message will be copied to the message bar in the target channel/group/chat, allowing you to add your own comments.

6. Simply send the message when you are finished and both messages will be posted to the new location.
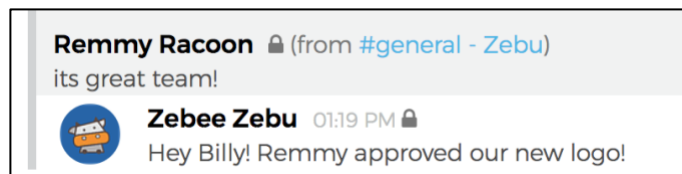
L. HOW TO ATTACH A FILE

Connect allows you to share a variety of files - images, spreadsheets, documents, etc. - by attaching them to a message. You can also download any files either sent by you or other user. Click here to learn on how to download a file.

There are two ways to attach a file to a message - drag-and-drop and navigate-and-select.

To attach a file using drag-and-drop:

1. Make sure you are in a chat or channel where you want to share the file.

2. Share the screen with the window where the file you wish to share is.

3. Click on the file and drag it to the Connect app window.

4. Release the mouse button to drop the file.

5. The file will be added to the message bar at the bottom of the window. Complete typing your message and send it.

To attach a file using navigate-and-drop:

1. Click the ✚ sign on the left side of the message bar and select **File**.
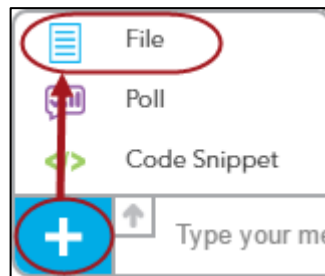
2. Navigate to and select the file you wish to share.

3. The file will be added to the message bar. Complete typing your message and send it.

The file will be accessible to any members in the chat or channel where you shared it.

M. HOW TO CREATE A POLL

On Connect you can easily build and share a poll in any conversation. This feature allows everyone to quickly and easily weigh in on any decision. It is simple to customize the poll to suit your needs, making it anonymous or open, immediate or scheduled, etc.
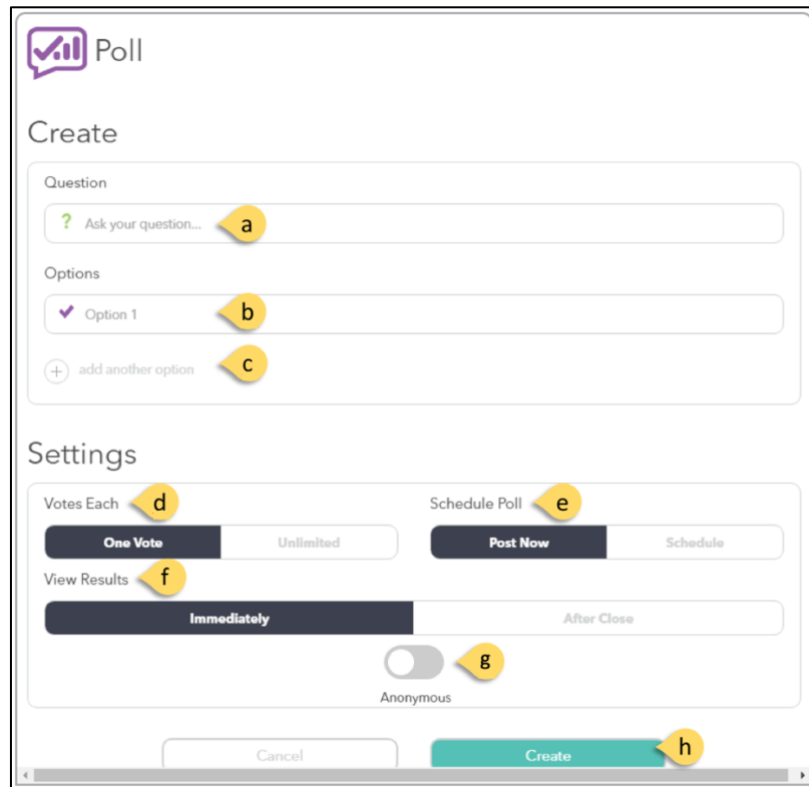
How to create a poll:

1. Click the ✚ sign on the left side of the message bar and select **Poll**.
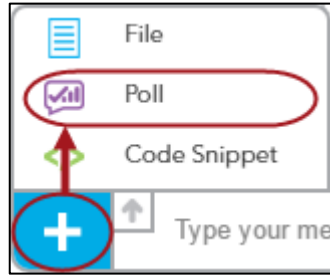
2. Configure the settings for your poll in the set-up window that appears.

    a. **Question**: Type your poll question here.

    b. **First option**: Create the first answer option to your poll.

    c. **Extra options**: Click on this option to add more choices to your poll.

    d. **# of votes**: Select if the users get one vote or unlimited number of votes each.

    e. **Schedule**: This option allows you to set the date and time when the poll will be publicly posted.

    f. **Results**: Select if you want the results to be visible as people vote, or to not show the results until the poll has closed.

g. **Anonymous**: If the **Anonymous** option is disabled, the poll will show which users voted for which option. If the **Anonymous** option is enabled the poll will only show the tally of results.

h. **Create**: Finish your poll by clicking on Create or Cancel if you changed your mind.

Once your poll is created, it will be posted accordingly with what was set on option **e**. When posted, users can vote right away by clicking on the options available. To cancel a vote, just click on that option again. If you just want to change the vote, just click on another option.

N. HOW TO CREATE A CODE SNIPPET

On Connect you can easily share and write codes to other developers. This feature allows everyone to quickly access codes and improve collaboration.

How to create a snippet:

1. Click the ➕ sign on the left side of the message bar and select **Code Snippet**.
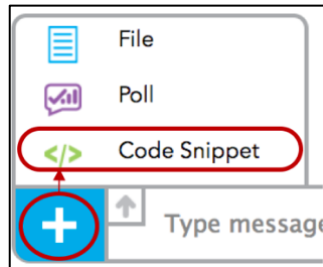
2. The code snippet will popup allowing you to import a code file from your machine or to write one. The user can format it by select any of the 20 languages we support.

    a. **Title**: Add a title to your Code Snippet.

    b. **Language**: Choose the language your code was written.

    c. **Composer**: Write or just paste your code on the code composer.
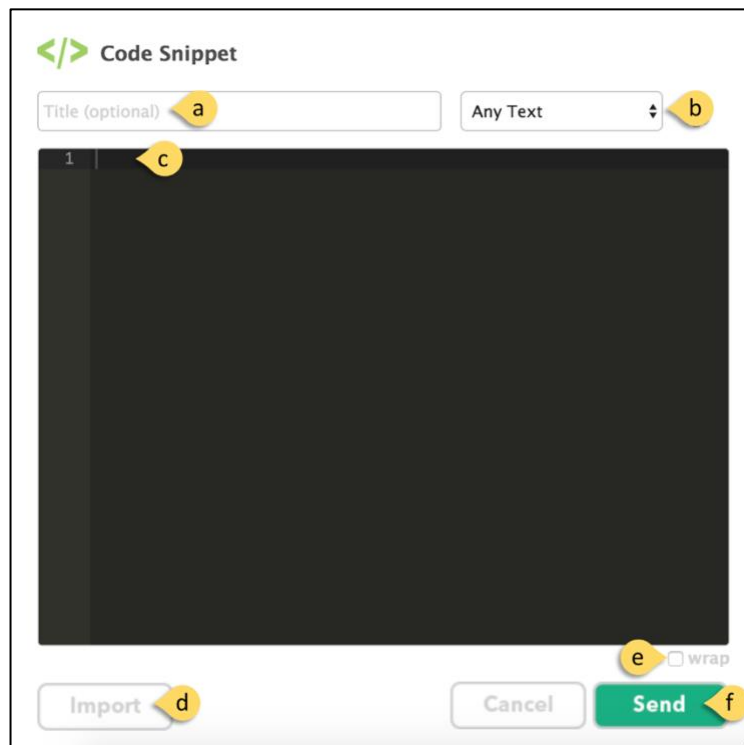
    d. **Import**: Import the code from your machine.

    e. **Wrap**: If needed you can Wrap your code to ensure that all DOM elements are loaded.

    f. **Finish**: Send it immediately or cancel in case you changed your mind.

Once your code is ready, it will be sent immediately to the chat thread. The Code view has a few options as listed below.
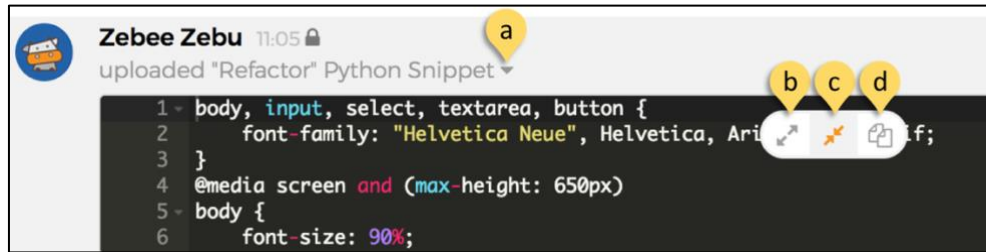
a. **Code info**: Title and language used. By clicking on the arrow, it will collapse the code. If needed, you can click back to expand it.

b. **Expand** the code by clicking on this option.

c. **Minimize** the code by clicking on this option.

d. **Copy** the code so you can paste it anywhere you want.

O. HOW TO SEARCH MESSAGES

Sometimes you know that a subject came up in discussion, but it is tedious to scroll through the conversation to find it. In this instance you can use the **Search** function to easily locate all the instances when a particular topic was mentioned.

How to search messages:

1. Click the 🔍 button in the top toolbar.

2. The Search panel will appear, and you will be able to search what you desire by using the elements listed below:
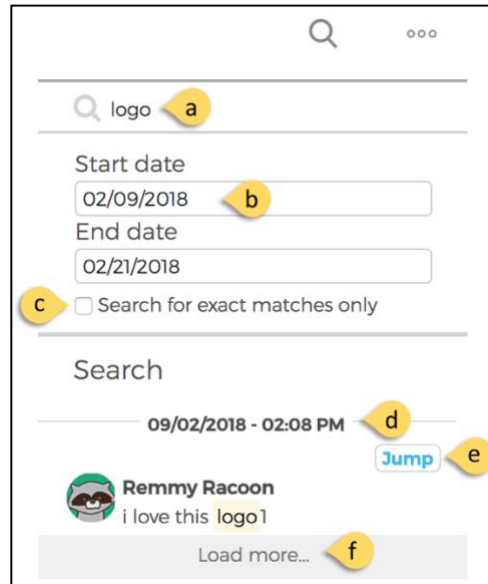
a. **Search Term**: Type your search hint in the search bar.

b. **Refine**: If you need to refine your search, make sure to pick a date on the calendar to set an upper limit on how far back in the conversation the search will go.

c. **Exact Match**: Check this option to make sure that our search will only come up with the exact results and will not show any related topics or sister words.

d. **History**: Search results will be shown from this section. They are listed on chronological order.

e. **Jump**: Clicking on Jump will bring you directly to that message.

f. **Load more**: If you still did not find what you were looking for, click on Load more to check if we can find anything else for you. If not, make sure to change the criteria chosen for the search.

Found what you were looking for? Whenever you Click on Jump the thread will load the message and highlight it in blue as shown on the example below:

You can use mentions to make sure that the users, to whom the messages are directed, are notified. You can review any messages in which you are mentioned in the right-hand side menu.

How to use a mention:

1. To include a mention, type "@" symbol, followed by the person's user name. If you do not know their user name, simply start typing their name and Connect will present you with a list of options.
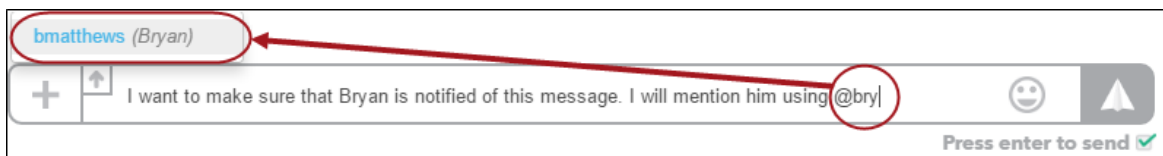
2. Select the user you wish to notify. This can be done with your mouse or your navigation keys.

3. Once sent, the mention will be highlighted in blue in the message.
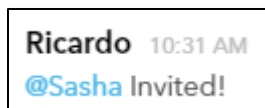
How to access your mentions:

Click the °°° button in the top right corner of the toolbar. If you open the **Mentions** tab of the options menu, you will see all messages in which you were mentioned. The mentions menu will have the following elements as listed below:
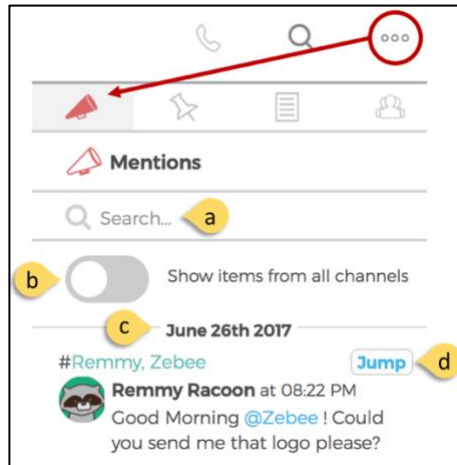
a. **Search**: Type your search hint in the search bar.

b. **Switch**: Turn this switch on and you will be able to find results when other users mentioned you across all chats.

c. **Results**: Search results will be shown from this section. They are listed on chronological order.

d. **Jump**: Clicking on [Jump] will bring you directly to that message. The message will be highlighted in blue like the following example.

Q.   HOW TO LOCATE PINS

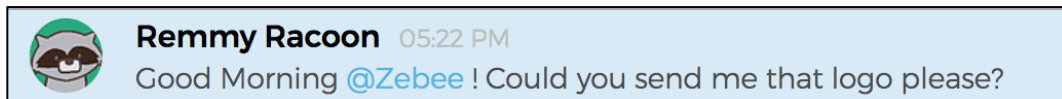Pins allow you to save messages, so you can check them at any time. See here how to pin a message.

How to access your Pins:

Click the °°° button in the top right corner of the toolbar. If you open the **Pins** tab of the options menu, you will see all the pinned messages. The pins menu will have the following elements as listed below:

a. **Search**: Type your search hint in the search bar.

b. **Switch**: Turn this switch on and you will be able to find all the messages pinned by you across all chats.

c. **Results**: Search results will be shown from this section. They are listed on chronological order.

d. **Jump**: Clicking on [Jump] will bring you directly to that message. The message will be highlighted in blue like the following example.
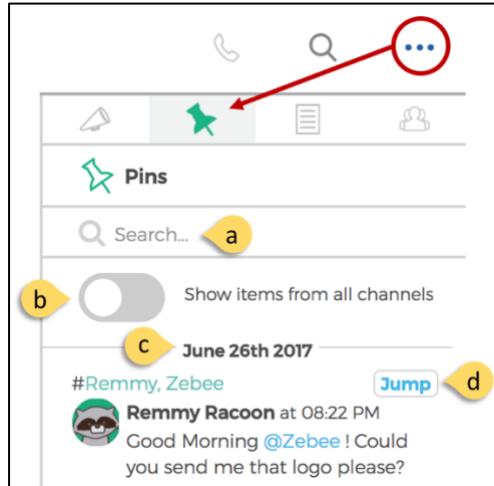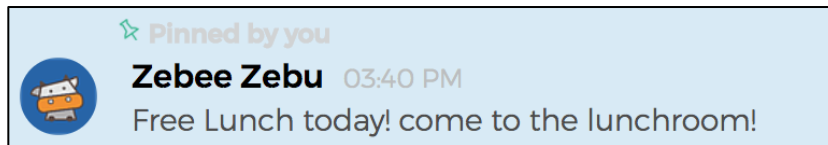

R.   FILE MANAGEMENT

Any files that you have attached to messages in Connect are available to you. See here How_to_attach_a_file. You can easily find any files that you sent or received under the File Section located in the right-hand side menu.

How to access your Pins:

Click the °°° button in the top right corner of the toolbar. The menu will open, and you will be able to find the **Files** tab. You will find files either sent or received and **download** them if needed. The Files menu will have the following elements as listed below:
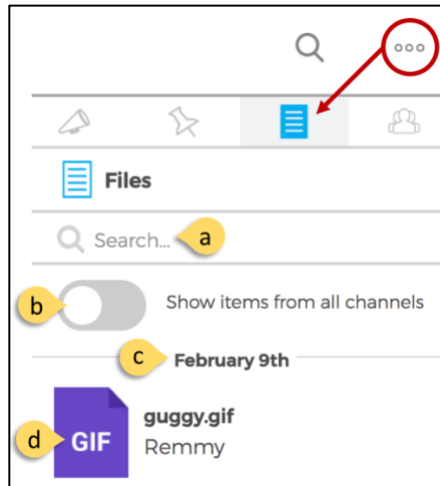
a. **Search**: Type your search hint in the search bar.

b. **Switch**: Turn this switch on and you will be able to find all files across all chats.

c. **Results**: Search results will be shown from this section. They are listed on chronological order.

d. **Download**: The name of the file will be in bold, while the name of who sent the file will be right be low it. Click on the file itself will automatically download it.

S.   USERS MENU

The **User** section of the options menu lists all users that are part of the chat you are accessing this feature.

How to find an user:

Click the ° ° ° button in the top right corner of the toolbar. The menu will open, and you will be able to find the **Users** Tab. you can scroll through the list to find a team member, or follow the steps below to find whoever you are looking for:
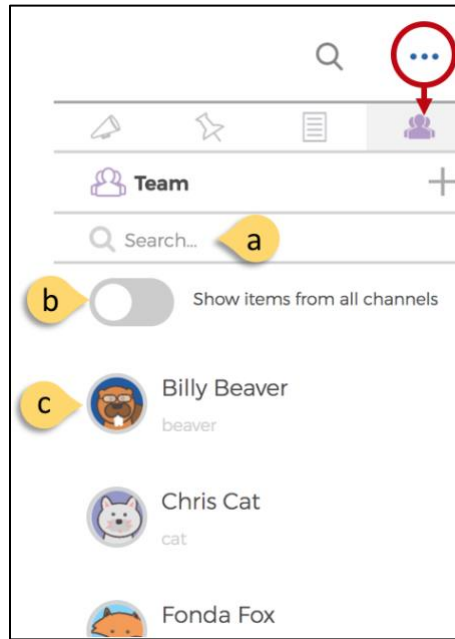
a. **Search**: Type your search hint in the search bar.

b. **Switch**: Turn this switch on and you will be able to find all users across all chats.

c. **Results**: Once you have found the member you were looking for, select them to get the details of their profile

a. **Name**: Here we display the name and availability status of the user.

b. **Favorite:** Click the star icon to add or remove the team member to the list of favorites.

c. **Send Message:** Click this button to send a private message to this team member.

d. **Mute:** Mute the conversation with this team member - you will still receive messages from them, but you will not get visual or audible alerts about incoming messages.

e. **Details:** Here you can check all the user info. Empty slots are info not described by the user

f. **User Permissions:** As an admin, you can set user permission, a user can be set as an Admin or regular User.

g. **User Admission:** This switcher allows Admins to deactivate or reactivate users into the Organization.

4.   SETTINGS

On Connect we provide a variety of settings to better suit your performance by customizing your experience! On the following topics we will direct you on how to manage Connect to improve your experience.

A.   EDIT YOUR PROFILE

You can edit the details of your profile such as user picture, username, and email address at any time.

How to edit your profile:

1. Click on your name in the top left corner of the app.
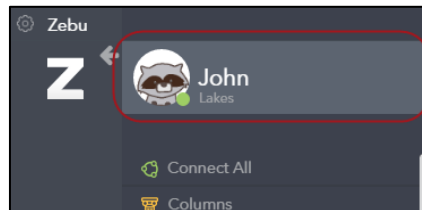
2. Select **Profile** under **Preferences.**

3. Edit any of the options available under **Profile**.

a. **First/Last Name:** Your first and last name.

b. **Email:** The email that will be used for all communications related to Zebu.
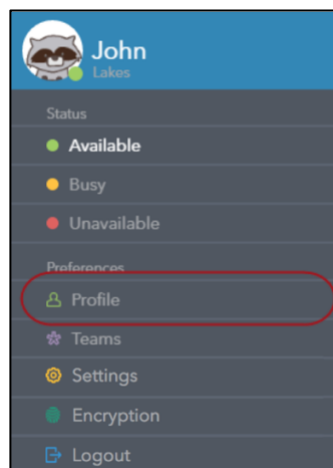
c. **Username:** The name that will be used to identify you in Connect.

d. **Time zone:** Indicates the time zone of your location to allow Connect to reconcile timestamps of posts made from different regions.

e. **Position in organization:** Your role in the organization.

f. **Profile Picture**: Add or change your profile Picture by clicking on this button. It will open a dialog where you can choose the new image from your machine. Adjust the image by sliding the cursor under the picture. Further to the right will enlarge the image while you can reduce its size by sliding to the left.

g. **Phone:** Add your phone number so you can receive token codes from us, in case you have this option turned on.

h. **Skype:** Your Skype account.
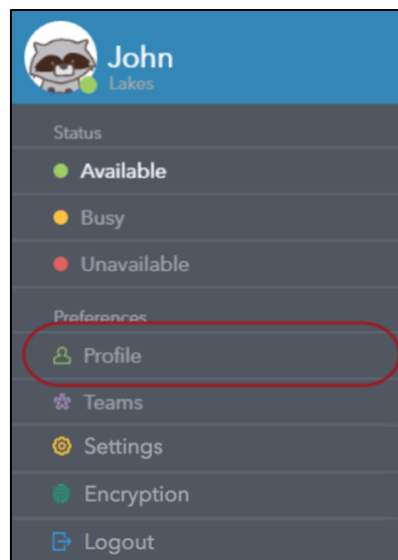
B. MANAGE YOUR PASSWORD

You can change your password at any time from the **Profile** view.
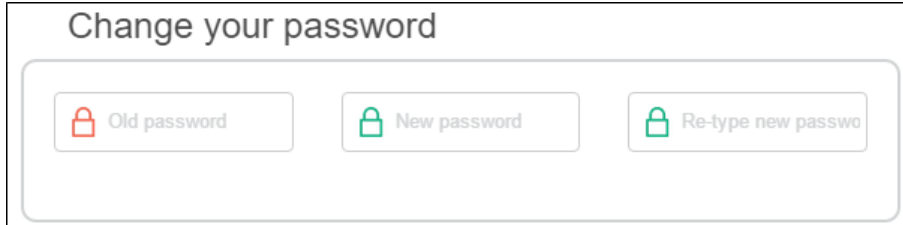
How to change your password:

1. Click on your name in the top left corner of the app.
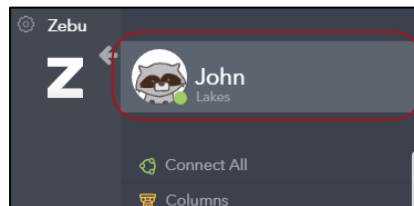
2. Select **Profile** under **Preferences.**

3. Click the **Change Password** button.

4. Enter your **Old password** then type and retype the **New password**.

Change your password

| 🔒 Old password | 🔒 New password | 🔒 Re-type new passwo |

5. The password must conform to the following rules:

- The typed and re-typed passwords must match.
- The new password must be at least 5 characters.
- The new password must contain at least 1 special character, 1 upper case letter, and 1 digit.
- The new password cannot contain the username.

6. Once you are finished, click **Save**.

C.   CONNECT SETTINGS

You can change Connect's standard settings at any time to improve your experience.

How to adjust Connect Settings:

1. Click on your name in the top left corner of the app.
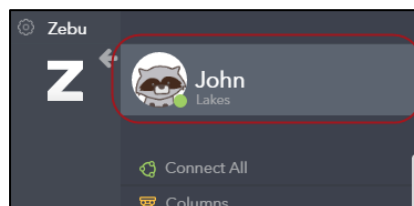
2. Select **Settings** under **Preferences.**

3. The Settings panel will open

a. **Exit**: Clicking on the X will close the Settings menu.

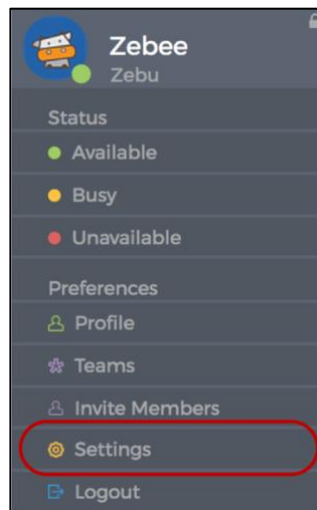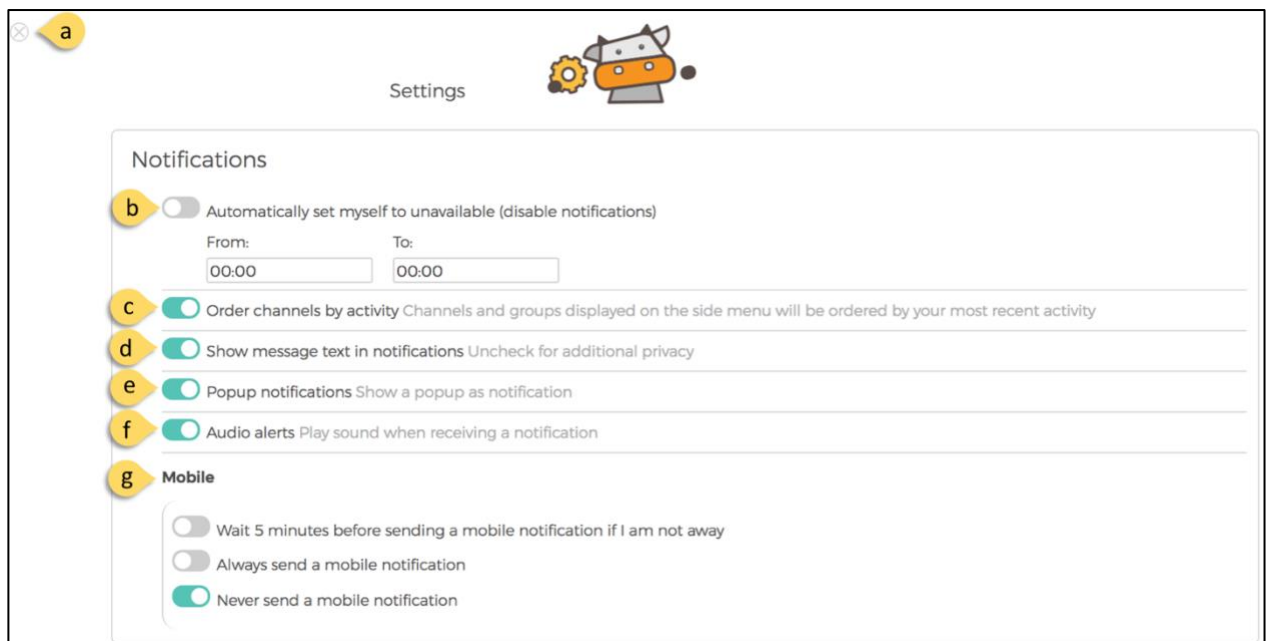b. **Unavailable Switch:** Turning this option On would automatically disable all your notifications and turn your status to Unavailable between the time set on the fields **From** and **To**.

c. **Chats Order:** Turning this option On will order all your chats by activity, which will display the most recent chats at the top of your list. Ignore this option if you want to keep the Default alphabetical order.

d. **Message Preview:** Check this option to receive a preview of new messages on text notifications.

e. **Popup notification:** When turned On, this Turn this option on to receive popups notifications.

f. **Audio Alerts:** This option allows audio alerts for every new message that you receive when you are status is set as Available.

g. **Mobile Notifications:** These options set how your mobile notifications will work. You can set to receive notifications on your mobile in case you did not read the message under a 5-minute period. You can also set to always receive notifications regardless of your status. If you don't want any notifications on your mobile, just turn the last option On and we will never send a mobile notification.

h. **Spellcheck:** Turn this option On so we can let you know when you misspelled something.

i. **Mention's list:** Turn this option On so we can suggest a list of users as you use @ and type.

j. **Emoji's list:** Turn this option On so we can suggest a list of emojis as you use " **:** " and type.

k. **Channel's list:** Turn this option On so we can suggest a list of channels as you use # and type.

l. **Emoji's tone:** Click on this option to choose the skin tone of your hand emojis.

m. **Security:** Add more security to your account by turning this option On. We will send a SMS with a unique code that you will have to type on your login screen.

n. **Finish Line:** Once you are done with your settings you can either Cancel, which will save your settings back to Default, or Save them.

D.   GROUP PREFERENCES

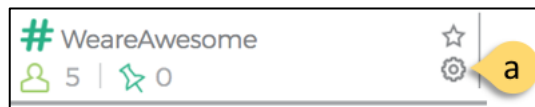When needed you can change Group settings at any time. To do that, follow the steps described below.
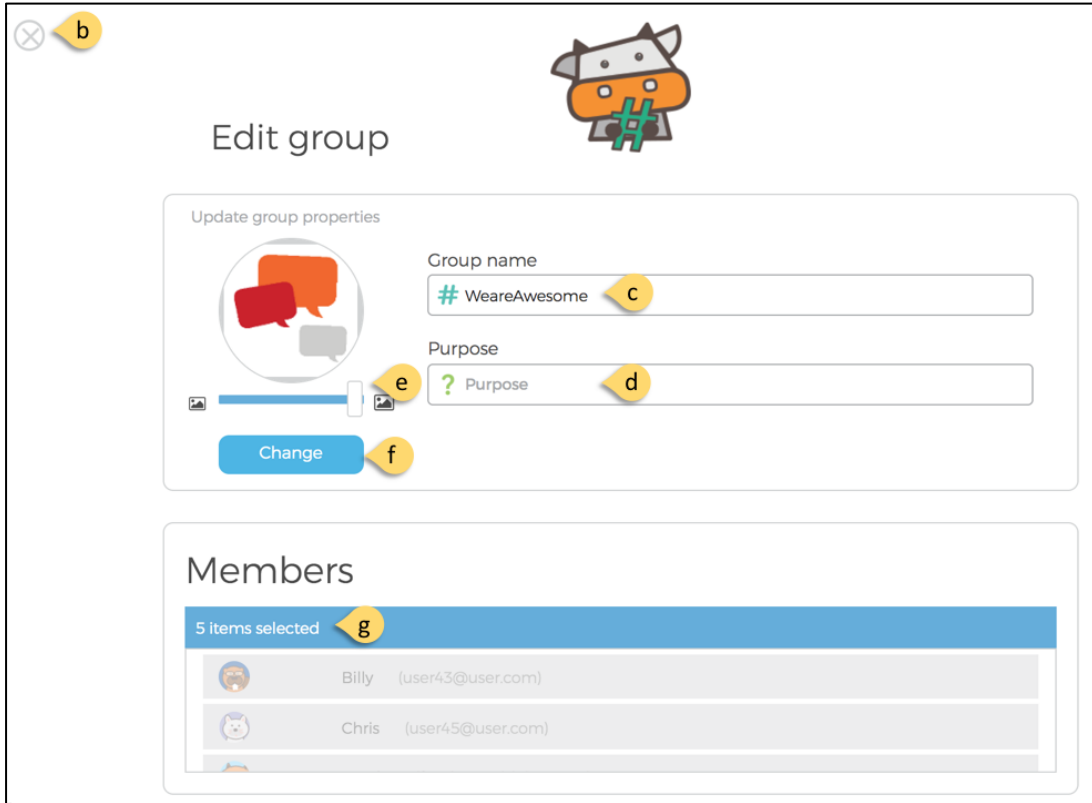
NOTE	If you are not the creator of the Group you will be restricted only to the **My Notifications** section.

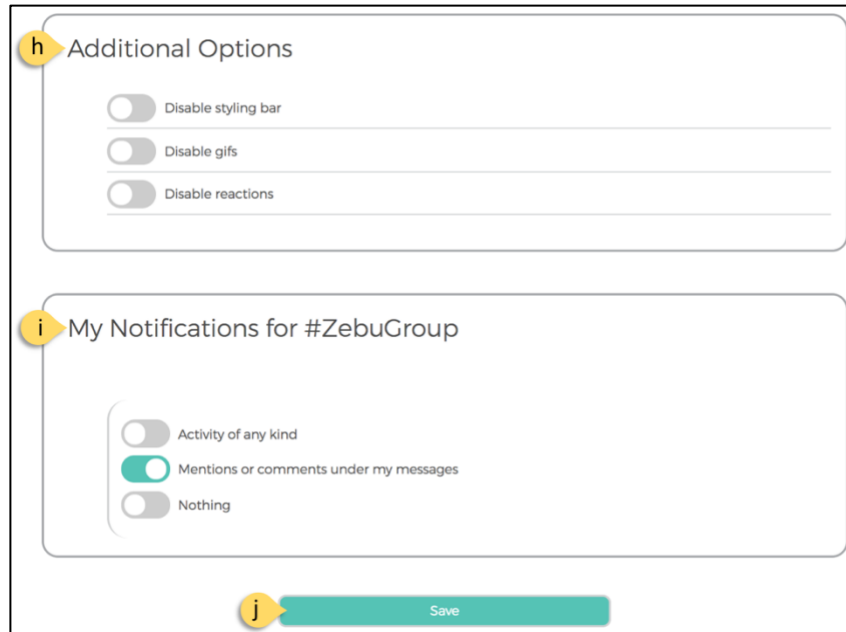a. Click on the gear icon on the header of the chat you need to adjust to open the Chat Preferences.

b. **Exit**: Clicking on the X will close the Settings menu.

c. **Group Name**: The user can change the group name at any time. This field can't be empty

d. **Group Purpose**: The purpose of a group works as a description of what the group is about.

e. **Group Image**: Adjust the group image by sliding the cursor under the picture. Further to the right will enlarge the image while you can reduce its size by sliding to the left.

f. **Change Group Image**: You can also change the group image by clicking on this button. It will open a dialog where you can choose the new image from your machine.

g. **Members**: On this section you can check the participants of the Group.

h. **Additional Options:** On this section you can choose to disable a few default options. The user can turn off the Styling bar, Gifs and Reactions and turn back on at any time.

i. **My Notifications:** The user can choose how the notifications of this group will work. The user can choose to disable all notifications, enable all or just mentions and comments your messages.

j. **Save:** Clicking on save will bring you back to the chat and will save all the preferred settings.
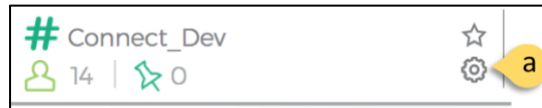
E. CHANNEL PREFERENCES

When needed you can change your Channel settings at any time. To do that, follow the steps described below.
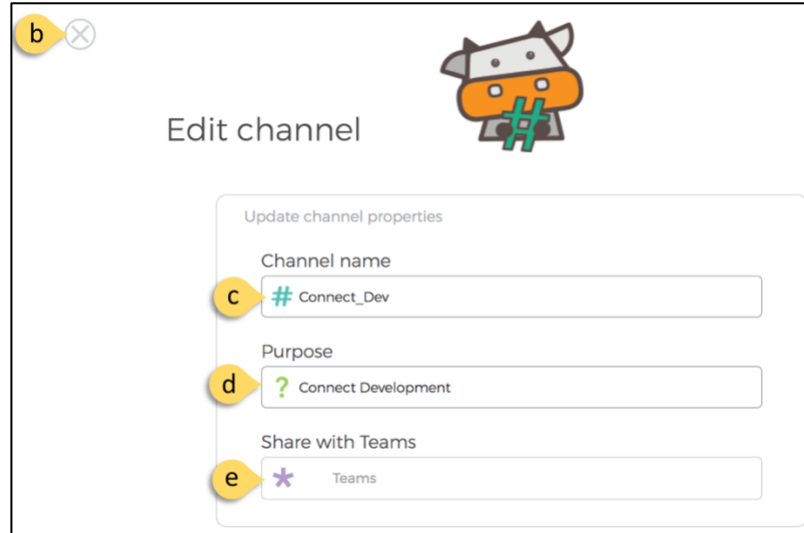
NOTE	If you are not the creator of the Channel you will be restricted only to the **My Notifications** section.

a. Click on the gear icon on the header of the chat you need to adjust to open the Chat Preferences.

b. **Exit:** Clicking on the X will close the Settings menu.
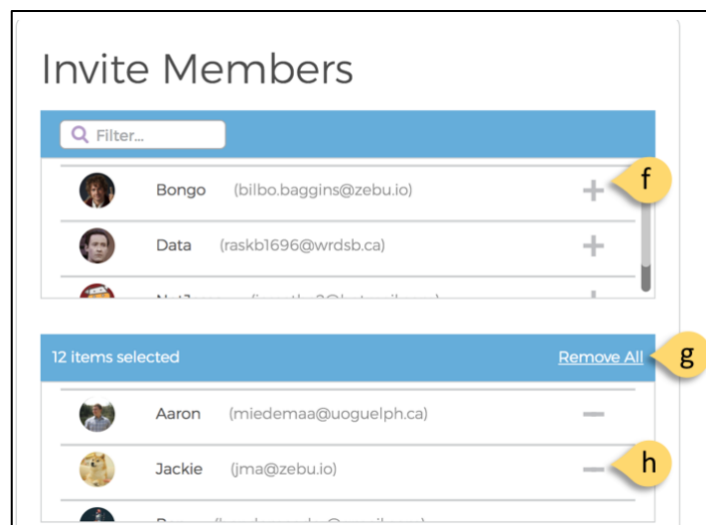
c. **Channel Name**: The user can change the Channel name at any time. This field can't be empty.

d. **Channel Purpose**: The Channel purpose works as a description of what the Channel is about.

e. **Teams:** This section allows the user to share this channel with multiple Teams. Just click on this field and a list of all teams will roll down. The user can also search a team by typing its name in. If needed, the user can delete the chosen teams from the list by just clicking on the **X** by its name test **✖** .

f. **Invite**: You can invite users at any time. You can browse on the Invite Members list or just use the list filter by typing in the name of the user you are looking for. Once found, just click on the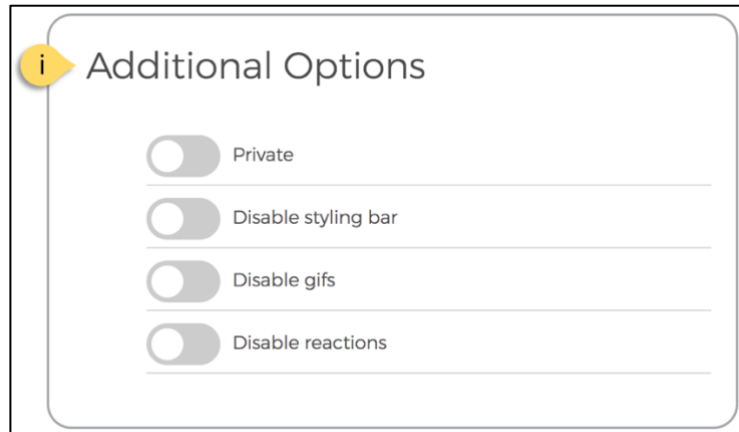 "**+**" and the user will be to the list and to the Channel once the user Save the settings at the end of the operation.

g. **Remove All**: The user can remove all users at one time by using this feature, but not him self.

h. **Remove**: You can also remove each user by clicking on the "**–**" button.

i. **Additional Options**: On this section you can choose to make this Channel private, which will make it visible only for those that are part or invited to the Channel. The user can also choose to disable a few default options. The user can turn off the Styling bar, Gifs and Reactions. These features can be turn back on at any time.
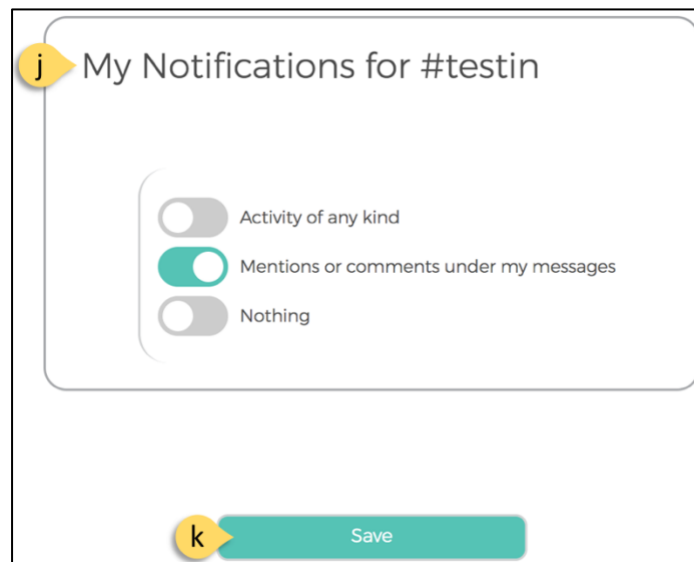

j. **My Notifications**: The user can choose how the notifications of this Channel will work. The user can choose to disable all notifications, enable all or just mentions and comments your messages.

k. **Save**: Clicking on save will bring you back to the chat and will save all the preferred settings.

F.   SET YOUR CONNECT AVAILABILITY

Connect has 3 online availability settings:
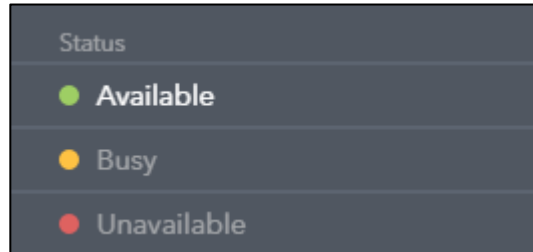
- **Available** - indicates that you have ready access to Connect and can receive and respond to messages.
- **Busy** - indicates that you have ready access to Connect but are otherwise engaged at the moment and may not respond right away.
- **Unavailable** - indicates that you are unlikely to read or respond to messages. It also mutes all sort of notifications.

How to adjust your availability status:

1. Click on the top bar to open the menu:
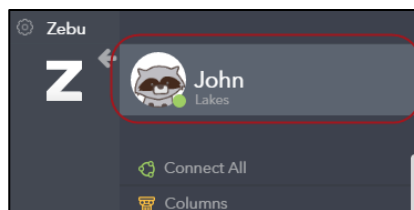
2. Among the options, choose the desired status. By clicking, your status will be updated immediately.
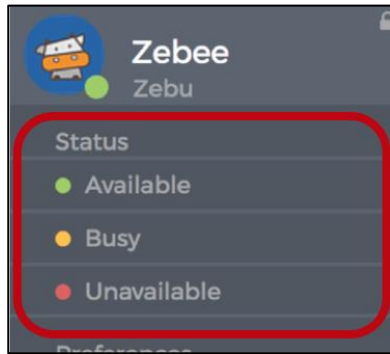
NOTE	Each status can also represent more information such as active and inactive. Check below how this works.

Regardless of the availability setting, if the Connect app or window is active on regular basis, the colored circle with be shown as solid ( ).

If the window has not been active for a certain amount of time, the circle will become empty ( ) to indicate inactivity.

If you log out or shut down the app (without having it open on another device), the availability indicator will become grey and empty ( ).

G.   HOW CONNECT NOTIFICATIONS WORK

Connect provides different types of notifications with different purposes to different chats. While using Connect, users can notice that the chat name can be highlighted, highlighted with a red counter, sometimes a notification will sound and also a banner will show. Here we will explain how each one works.

a. **Audio Notification**: Our notification will sound whenever you receive a **Direct Message**, a message on **Connect All**, a **Mention** on a Channel or a **Comment** on a Message Thread you are following.

b. **Highlight**: This is the standard visual notification. A chat will have its name highlighted whenever a new message is received.

c. **Red Counter**: You will receive a red dot whenever you receive a **Mention** on any Channel or receives a new **Direct Message**.

d. **Banner**: A message preview will be shown on a banner format whenever are on another chat at the moment. Or on your phone, depending on your mobile settings.
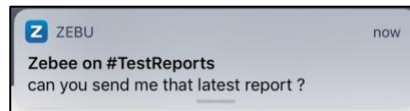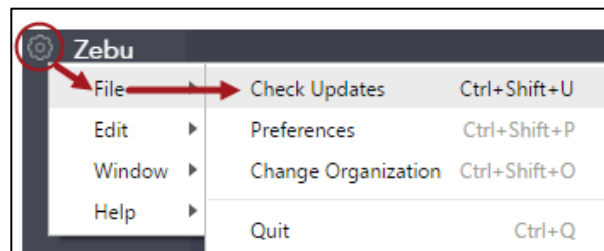

| NOTE	Users can change the default notification pattern by changing its Availability Status and the Chat notifications under each Chat Preferences.

H.   HOW TO UPDATE CONNECT

Connect automatically checks for updates on start up. If you have not restarted the application in a while, you can check for updates following the steps below.

How to update the app:

Select **Settings > File > Check Updates** (Ctrl+Shift+U) in the **top left corner** of the app and Connect will check if the version is current.

If an update is available, the app will prompt you to restart, which will install the update. If you are running a current version of the app, a message to that effect will be displayed.
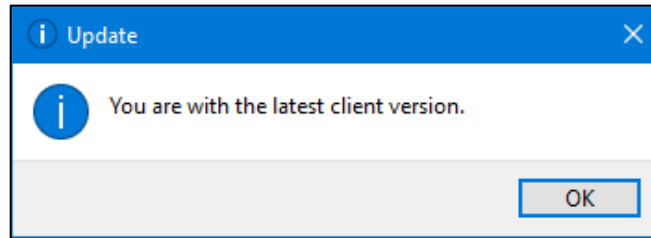
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