Step by Step Detailed Guide to Setting UP fotoShout

USERS GUIDE #03

Step by Step Guide to Setting up fotoShout

Using the fotoShout app on your tablet

A detailed guide

The fotoshout user guide has been divided into sections. Section 1 - **Preferences & Setup**, Section 2 - **Event Setup**, Section 3 - **Using fotoShout at the event**. The following is a step by step guide describing a complete event setup through the fotoShout web portal, including first time set up. Operational use of the event computer and tablet with fotoShout. fotoShout quick guides can be used for rapid reference once initial setup has been completed .

Section 1 Preferences & Setup

Step 1 -Publish configuration and e-mail server is a onetime set up, unless you change your e-mail password or address.

Step 1 - How to Login & First Time Setup

Publish Configuration & E-mail Server Configuration

1) Go to www.fotoshout.com
   a. Click on **"login"** in upper right hand corner of screen, a dialog box will open
   b. Enter your username and password, click enter

2) First time usage of fotoShout you must click on "**Preferences & Setup**"

Please Note - Email Server Configuration

is a onetime set up on the fotoShout web portal unless you change your

E-mail password or address.

3) "**Publish Configuration**" was set up for you. **Do nothing**, you do not need to enter any information.

Email Server Configuration Tab - One time setup *(unless you change your e-mail password or address)*

1) Select "**Email Server Configuration**" tab from the left side of the screen
   a. **Fill in outgoing "Server" information**. Server Info will be obtained from your email service provider. *(Arclab has a comprehensive list of providers with server configuration information.* http://www.arclab.com/en/amlc/list-of-smtp-and-imap-servers-mailserver-list.html *)*
      i. I.E. our outlook account uses - "**Pod51018.outlook.com**"
      ii. Our G-Mail account uses "**smtp.gmail.com**"
   b. **Fill in outgoing Server port** (SMTP) Obtained from your email service provider
      i. Our outlook account uses **Server Port** "**587**"
      ii. Our G-Mail account also uses Server Port "**587**"
   c. **Enter Yes or No for SSL** – depends upon your email service provider instructions
      i. For outlook email we select "**Yes**"
      ii. For G-mail we select "**Yes**"
   d. **Domain** – Currently reserved for future use, Leave Blank.
   e. **Enter Username** (**e-mail address)**
      i. This is the **e-mail address** of the account you're sending your e-mails from. Such as - "info@fotoShout.com"
   f. **Enter Password**
      i. This is the password you use for your email, registered with your e-mail service provider.
   g. **Click save**

Step 2 – Setting Up Event Preferences

Event Options Tab (Creates what information will be collected on the iPads, from the guests)

1) Click on "**Preferences & Setup**"
2) Select "**Event Options**" tab located left side of screen
3) A dialog box will open. Click on "**New Event Option**" to create a new event, or roll the mouse over the name of event, click on the pencil icon to **Edit**.
   a. **Name** – give an easily recognizable name to the form you are creating. If you plan on always collecting name, email address, signature, you may want to name this selection "Basic Info."

b. **Check the boxes** of the information you want to collect. These dialog boxes will appear on the iPad.

Event Clients Tab (feature is still under construction, can be skipped for now)

1) Click on "**Preferences & Setup**"
2) Click on the **"Event Clients"** tab
3) A dialog box will open named "**Create Event Client**", or if editing "**Update Event Client**" - This is where you will give a name to your new event, you may *(optional)* select the client's or sponsors event logo which will be placed on the tablet. (feature under construction)
   a. Place the name of your new event in the "**Name**" dialog box.
   b. **Logo URL** – usually the easiest way to fill in; Go to the company's web site, right click on the logo, click on "**copy image URL.**" Then paste the image URL into the "**Logo URL**" dialog box. (feature under construction)
   c. Click on the "**create**" button.

Email Templates Tab – (What your client will read when they receive the event e-mail, along with a link to their photograph.)
Example Image below

1) Click on "**Preferences & Setup**"
2) Click on **"Email Templates"**
3) To create New outgoing Email for your event.
    a. Click on "**New Email Template**"
    b. **Template Name** - Give a name that you will recognize. I.e. "fotoShout Demo" "DCP Charity Golf Tournament."
    c. **Subject** – This is what your guests will read in the subject box of the e-mails they receive from you, or your client.
        i. I.e. Subject: "Thank you for attending the fotoShout Demo event in the O.C."
    d. **Content** – This is the body of your email, the message your guests will read. You may also place holder "**tokens**" into the body of the text, by copy and pasting. We have supplied a basic html e-mail message with tokens which you may use or modify. *A token is I.E. "Dear @Model.FirstName" – when the guest receive their e-mail their first name will be placed into the body of the e-mail - Dear Bob,…. See "Users Guide #05 - E-mail Template & Tokens Users Quick Guide" for details, assistance and available token place holders.*
    e. When finished editing click "**Create**".
4) To **Edit** a current email template
    a. Roll mouse over template name
    b. Click on edit icon (pencil)
    c. When finished editing click "**Update"**.

Section 2 – Events Tab

Create a New Event   *(In a hurry - Only information with an "*" must be completed.)*

1) Login - Make sure "**Events**" tab at top of page is selected
2) Click "**Create New Event**" Button
3) Fill in dialog boxes
   a. **Name** - name of event
   b. **Description** – description of event
   c. **Date** – Click dialog box, a calendar will open. Enter event date.
   d. **Location of event** – physical location i.e. Orange, CA.
   e. **Folder** – where fotoShout will look to find the images – i.e. your cameras "Hot Folder."
   Name the drive **(fotoShout recognizes the C: & D: drives)** Give the folder a name, please use your company name or username each time within the folder. such as;
   c:\dcp\09_21_15_event   or   c:\dcp\RHS\08_18_15
   c:\artandfun\09_15_15   or   c:\artandfun\dallas\12_22_15
   You **DO NOT** have to create the event folder *(c:\dcp\09_21_15_event)* on the event computer(s), fotoShout will automatically create the folder for you. After an event has been setup on the fotoShout web portal, the next time the event computer is connected to the internet the event computer will sync with the fotoShout web portal, creating the folders for you. (it may take a couple of minutes after connecting to the internet)
   f. **Album Name** – What fotoShout will automatically name the Facebook album. (The album creation and naming occurs when the first image is uploaded for publishing)
   g. **Option** – Select the profile of the information you decided collected on the iPad, at the upcoming event. (*You created these options & profile name within "preferences & Setup" earlier*)
   h. **Email Template** – Select the e-mail template you created or use Basic. (*You created the Email templates and named the template in an earlier step within "preferences & Setup)*
   i. **Sponsors** - name of event client, *(whom is paying for the event)* setup was in Preferences & Setup
   j. **Channel Groups** – Social media sites you're going to publish too. Select the channel Group you wish to publish too. *If you haven't created a channel group don't worry, the channel group selection can be skipped for now, edited later. Editing Instructions are below. How to create channel groups can be found in the* **fotoShout "User Guide #04 - How To Setup Social Media Channels."** *Images may be censored before publishing. (edit names, e-mails, disapprove for publishing) To edit images leave Channel Group Selection or set selection to "**Select a Channel Group**," and review User Guide #11.*
   k. When finished entering data click **Create** or **Update**. *(You can edit at anytime.)*

"Event Type" Tab *(left side of screen)*

1) **"Login"** to fotoShout – "**Events" tab** at top of page should be selected, Click on "**Event Type**." Select-

- a. **All** – Displays all events.
- b. **Open** – Display's events that are open, images can be added to this open event, images can still be published.
- c. **Completed** – Display's events that are closed, can no longer be published too.
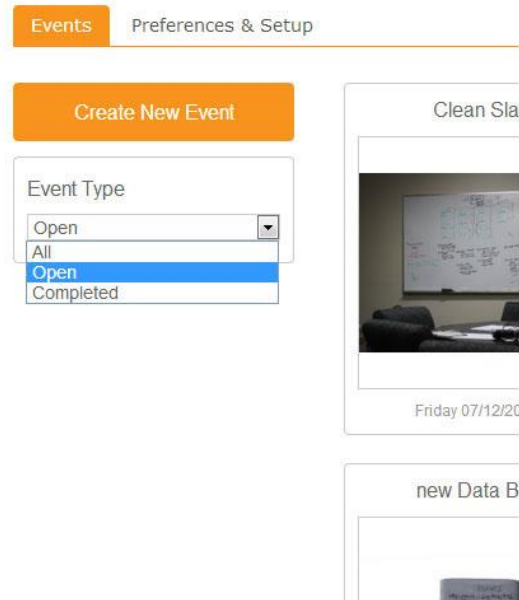

Edit an Event

1) Login to fotoShout, Confirm "**Events**" tab at top of page is selected
2) Roll mouse over the event you wish to edit.
3) Click on the **Edit icon** (pencil), all features in original setup will be available for editing. After editing click "**Update**"
4) Click on "check" icon to mark an event as complete. You will no longer be able to publish to this event, the event will automatically be removed from your tablets.
5) Click on "**X**" icon to delete event. Only an event that has not been published can be deleted. You will be asked to confirm deletion before event is deleted.

1) Login to fotoShout, Confirm "**Events**" tab at top of page is selected, If not click on "**Events"** tab.
2) The "Event Type" navigation panel allows you to select
   a. All Events
   b. Open Events
   c. Completed Events
3) Double Click on the image of the event you wish to view.
4) Event Opens -Thumbnail views of all images are displayed, the current selected image is enlarged.
5) The navigation Panel allows you to select "**Photos**" or "**History**" within the dialog box.
   a. If "**Photos**" is selected the slider will show all the uploaded images
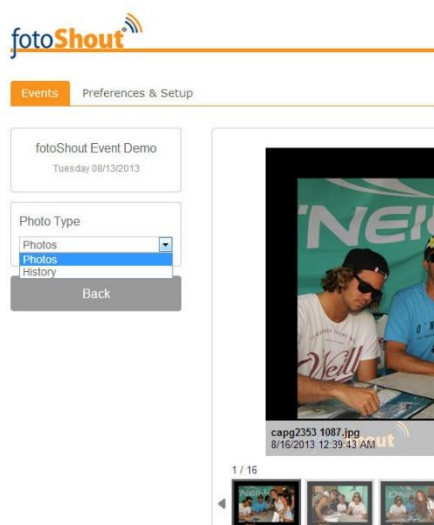
6) If "**History**" is selected – One box will display the name of the event, date of the event, and how many images were processed by fotoShout at the event.
   a. Click on selected Event (distinguished by day and date)
   b. All images that were processed with fotoShout at that specific event are viewable.

   c. Each Image displays **Image File Name**, **Date & Time** submitted for publishing, **Publishing Status** – such as - **published, waiting to publish, not published yet/unauthorized, guests e-mail address, and icon of the social media site you published too will be displayed**.

7) **REPORTS** - When History mode is selected "**Reports**" can be generated. (video demo on fotoShout web site.)

    a. Click on the "**Generate Reports**" tab left side of screen. All information collected will be displayed. *(see image below)*
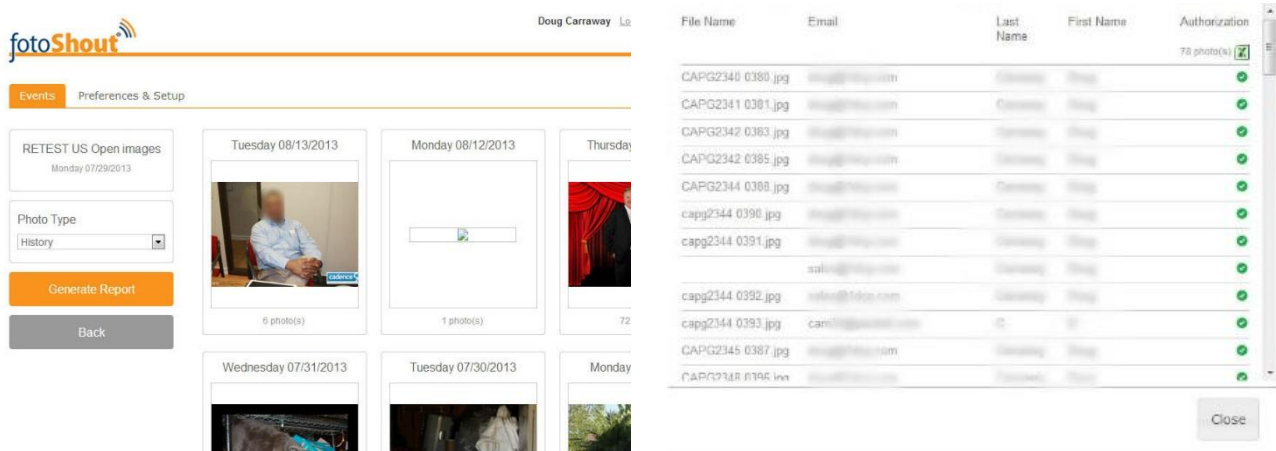
    b. A file may also be generated for easy export to Excel. Just Click on the Excel Icon.

8) When done click the **"Back"** tab.

Section 3 – Event Computer & Tablet

1) Event computers & iPad *(standard & mini)* tablets should already have fotoShout software installed. If not please review user guide, **"User Guide #02 - How to install fotoShout Software**." Install before proceeding.

2) Turn **ON** event computers. *(Before the event at your studio or office)*

    a. Connect computer to the internet. Your computer will automatically sync to the fotoShout Portal. The first time you ever sync your event computer to fotoShout in might take a few minutes. After an event is created on the fotoShout portal it must sync to the event computer. Sync creates the files & folders in the event computer for the new event. As stated earlier this only takes a few minutes. Once the Setup is complete a live internet connection is NOT needed to use fotoShout at an event.

        i. The file you created in the fotoShout portal will automatically be created on your event computer. i.e. **c:\dcp\09_21_15_event**

   ii. Direct your camera or your event software to place your images into this folder. **c:\dcp\09_21_15_event**

3) Turn on your tablet. Connect the tablet to the same router (Wi-Fi connection) the event computer is connected too.

4) Start the fotoshout app on the iPads
   a. Login screen will display
   b. Enter your e-mail address, password & URL (IPV4 address) *Don't worry- keep reading.*
      i. The URL is your routers iPV4 address. It's very easy to reserve your Routers IPV Address so it will never change. See User Guide #08
      ii. To find your **Routers IPv4 Address** – Click on "**Network & Sharing**," icon in the system tray, usually located in the bottom Right hand corner of the computer screen. If you're using wired LAN, left click on "**Local Area Connection**," Click "**Details**," the **IPv4 address is displayed**.
      iii. You may also find your **IPv4** address by clicking on the "**Windows**" key and pressing **"R'** at the same time. Enter "**cmd**" into the dialog box. Type in "**ipconfig/all**" press enter. Use the slider to find "**Ethernet adapter Local Area Connection**:" in Windows 7. Or "**Ethernet adapter Ethernet**" in Windows 8.x. The **IPv4** address is located under these headings.
      iv. Enter the **IPv4** address in the URL box on the iPad, at the end of the URL enter **/API/fs1**. The URL you enter will look similar to this **http://10.0.1.15/API/fs1** Be sure and click save address. You will not need to enter the address again. *(Tip - Tape this number to your Router for easy reference)*
      v. **Either turn off your computers fire wall, or allow fotoShout access.** The #1 Reason the fotoShout iPad app does not connect to the event computer is; it is blocked by the **FIREWALL**. #2 Reason – An anti-virus software such as Windows defender is blocking fotoShout (turn off anti-virus, once fotoShout is connected turn back ON. Create an exception to allow fotoShout through anti-virus) #3 Reason- iPads are **Not** connected to the **correct Wi-Fi Router**

5) Click "**Login**", your connected. Tap the screen of the event you wish to view.

6) When an image is taken, your event software should be set to transfer the images to the event folder your created which is monitored by fotoShout. fotoShout will automatically transfer the images to the fotoShout app on the iPad.
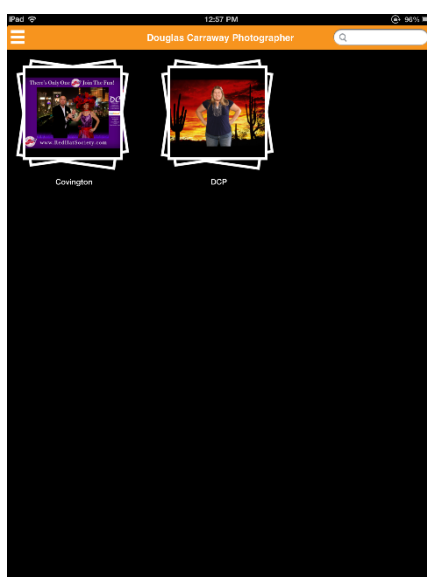
Operating the fotoShout iPad App

1) To collect requested information
    i. Tap an image to bring up the options interface.
    ii. Star rate the image if do desired.
    iii. Fill in the requested information – name\address\permission to publish\etc. Tap the signature dialog box to enlarge, have guest sign, click save.
    iv. To add another person's information to the same image tap the "**+**" symbol. Enter information. When completed click "save", click "submit," click "confirm."
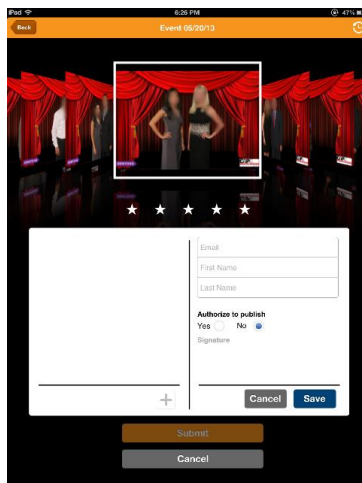
   v.   After "Confirm" is clicked image will disappear from the event queue, image is moved to the History folder on all iPads.

2) **Un-Claim** an Image. This feature allows removal of an image from the event queue, to keep the event queue short. The image may be placed back into the event queue at your discretion.
    i. To remove image- press and hold image. A dialog box will display, "**Do You Wish to Un-Claim Photo**," Click "**yes**." Image will be removed from event queue.
    ii. To Re-Claim image – press history icon located in the top right hand corner of tablet event screen. Tap on the "**Un-Claim**" folder. Tap on the image you wish to Re-Claim. A dialog box will ask if you want to **Re-claim** the image. Tap "**Ye**s." Image will be moved back into the event queue.

3) **To Enlarge** (zoom) - Double tap image in event queue.

4) **To View** different images in regular, or event mode, or zoom mode, swipe your finger across the screen left to right, or right to left.

5) **Event History & Editing** – After guest information has been collected, entered & saved the images are moved to Event History. To Edit or view saved images tap the History icon (located in the top right corner of the iPad or iPad mini), then tap the Event History folder.
   i. Tap the image you wish to edit, click on edit information.
   ii. Edit information, select Save then Submit.
   iii. If images have **already published editing will not be available**.

6) **Un-Lock an Image** – When an image has been selected and information is being entered on a tablet, the other tablets are locked out. A message will display "Image is already in use, do you wish to override?" Select "Yes" or "No." Most of the time the answer is No. Let those who have the image open finish entering information. If **"Yes"** the selected Image will be available to you.
   Publishing Images - If you're connected to the internet while photographing an event, fotoShout is automatically uploading, and publishing to your selected social media sites. If you're not connected to the internet fotoShout will store the data and images. fotoShout will **automatically** publish your event images a few minutes after an internet connection becomes available. You do not need to logon, or start anything, publishing is automatic.

Tips

Don't forget to;

- Turn off your firewall or give fotoShout access.
- Confirm iPads are connected to the correct router.
- Add *"/API/fs1"* to the end of your URL
- An Image can be edited up until the time it is published
- Turn off firewall & antivirus *(such as Windows Defender)* or create an exception to give fotoShout access