

**(0:00-0:15) – Welcome & Security**

*(Title card: FAB360 User Guide: Your First Assessment)*

**VOICEOVER:** "Welcome to FAB360 by Family and Business Learning. Your trust is our priority: you always own your data, we never sell it, and everything is protected with industry-standard encryption."

**(0:15-0:35) – Getting Started**

*(Screen: Login page → Plan selection)*

**VOICEOVER:** "Log in with your secure magic link. Choose your plan—Family, Advisor, or Advisor Plus—each includes a 14-day Communication360 trial. You can change plans anytime."

**(0:35-0:55) – Create Family Profile**

Revised 3-Minute USER GUIDE videos (Two Versions)

11/17/25 6:59 PM

**Version 1: Comprehensive User Guide (3:00)**

*(Screen: Dashboard → Add Family form)*

**VOICEOVER:** "From your dashboard, click 'Add Family.' Enter the name, select timezone, choose a color for organization, and optionally upload an image. Click 'Save.'"

**(0:55-1:15) – Add Participants**

*(Screen: Raters tab → Add New Rater)*

**VOICEOVER:** "Go to the 'Raters' tab. Click 'Add New Rater.' Just provide email and name—they can update details later. Role and age are optional."

**(1:15-1:50) – Launch Survey**

*(Screen: Select tool → Create Survey workflow)*

**VOICEOVER:** "Back on the dashboard, select your tool and click 'Create new Survey.' Follow three steps: Name your survey and set expiry; Select raters; Complete billing. Your plan includes free raters for core assessments—additional raters or premium tools will show here."

**(1:50-2:10) – Email Expectations**

*(Screen: Email animation → Security reminder)*

**VOICEOVER:** "After payment, personalized invites are sent automatically. Each has a unique, non-transferable link. Raters typically receive emails within 10-15 minutes—ask them to check spam if needed."

**(2:10-2:40) – Manage & Review**

*(Screen: Dashboard tracking → Report preview)*

**VOICEOVER:** "Track responses in real-time. We send automatic reminders 21, 3, and 1 day before expiry. Crucially, review and edit AI-driven insights before closing the survey—your expertise ensures the narrative is perfect."

**(2:40-3:00) – Results & Conclusion**

*(Screen: Sample reports → FAQ link)*

**VOICEOVER:** "After closing, raters get anonymized Individual Feedback Reports while you receive the comprehensive Facilitator's Feedback Report with all identities and responses. Visit our FAQ for more. Thank you for partnering with us in strengthening families."

**(0:00-0:15) – Welcome & Security**

*(Title card: FAB360 User Guide: Your First Assessment)*

**VOICEOVER:** "Welcome to FAB360 by Family and Business Learning. Your trust is our priority: you always own your data, we never sell it, and everything is protected with industry-standard encryption."

**(0:15-0:35) – Getting Started**

*(Screen: Login page → Plan selection)*

**VOICEOVER:** "Log in with your secure magic link. Choose your plan—Family, Advisor, or Advisor Plus—each includes a 14-day Communication360 trial. You can change plans anytime."

**(0:35-0:55) – Create Family Profile**

Revised 3-Minute USER GUIDE videos (Two Versions)

11/17/25 6:59 PM

---

**Version 2: Quick Start Guide (3:00)**

**(0:00-0:15) – Welcome**

*(Screen: FAB360 dashboard)*

**VOICEOVER:** "Welcome to your FAB360 dashboard. Here's how to launch your first assessment quickly."

**(0:15-0:35) – Create Family**

*(Screen: Add Family workflow)*

**VOICEOVER:** "First, click 'Add Family.' Enter the family name, select their timezone, choose a color, and optionally upload an image. Click 'Save.'"

**(0:35-0:50) – Add Raters**

*(Screen: Raters tab → Add New Rater)*

**VOICEOVER:** "Next, go to 'Raters' and click 'Add New Rater.' Provide emails and names—they can complete other details later."

**(0:50-1:05) – Security Assurance**

*(Screen: Security badge visual)*

**VOICEOVER:** "As you add data, know that you always retain ownership, we never sell information, and everything is encrypted."

**(1:05-1:40) – Launch Survey**

*(Screen: Create Survey → Billing)*

**VOICEOVER:** "Return to the dashboard, select your assessment tool, and click 'Create new Survey.' Name it, set expiry, select raters, then complete billing. Your plan includes free raters—additional needs are handled seamlessly at checkout."

**(1:40-2:00) – Email Details**

*(Screen: Email animation)*

**VOICEOVER:** "Invites with unique links are sent automatically. Links can't be shared. Raters should receive them within 10-15 minutes—suggest checking spam if missing."

**(2:00-2:30) – Monitor & Refine**

*(Screen: Dashboard → AI insights editing)*

**VOICEOVER:** "Monitor progress on your dashboard. We handle reminders

**(0:00-0:15) - Welcome & Security**

*(Title card: FAB360 User Guide: Your First Assessment)*

**VOICEOVER:** "Welcome to FAB360 by Family and Business Learning. Your trust is our priority: you always own your data, we never sell it, and everything is protected with industry-standard encryption."

**(0:15-0:35) - Getting Started**

*(Screen: Login page → Plan selection)*

**VOICEOVER:** "Log in with your secure magic link. Choose your plan—Family, Advisor, or Advisor Plus—each includes a 14-day Communication360 trial. You can change plans anytime."

**(0:35-0:55) - Create Family Profile**

**Revised 3-Minute USER GUIDE videos (Two Versions)**

11/17/25 6:59 PM

automatically. Before closing, review and refine the AI-generated insights—this human touch ensures perfect client readiness."

**(2:30-3:00) - Final Reports**

*(Screen: Report comparison → FAQ link)*

**VOICEOVER:** "After closing, raters get anonymized Individual Feedback Reports while you receive the comprehensive Facilitator's Feedback Report with all identities and responses. Visit our FAQ for more guidance. We're proud to support your work with enterprising families."