BlueSecures.ai ®

BlueSecures

User Manual

Version: 1.0
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BlueSecures.ai ®

Table of Contents

About Deskfactors Inc and BlueSecures

Deskfactors Inc is one of the fastest growing AI led - B2B SaaS marketing, communications and engagement product & platform company, which is headquartered in NC, US. Deskfactors Technologies Pvt Ltd. is the India arm focused on product development, customer delivery (pre-sales, implementation, support and professional services). The integrated productized solutions are predominantly offered to SMB, Mid-market & Enterprise companies in the US, India, Asia Pac and Middle East across industry verticals. Deskfactors owns BlueSecures an ISO270001 & HIPAA certified secure messaging & payment facilitation SaaS product for global subscribers and users.

BlueSecures is the B2B SaaS encrypted secure messaging product & AI driven marketing and workflow automation platform for the global markets (US, Asia Pac & India) offering product deployment & integrations, for the Mid-market and Enterprises.

BlueSecures.ai – Customers can acquire, support and engage their customers with secure messaging, campaigns, AI chatbots & payments platform. It is available on Android, iOS & BlueWeb (Desktop browser) and is ISO 27001 certified and HIPAA compliant.

Offerings & outcomes for the businesses are:

1. Campaign tool - 10X more leads from WhatsApp.
2. Customized AI chatbots – offer real-time customer support, sales & engagement.
3. Secure Messaging - customer engagement, Sales & Support.
4. Integrated Payments – Reduces cash flow cycles, increase sales and revenues.
5. Data security - customer data & business data.

Glossary

1. **Super Admin:** When a user registers their business with BlueSecures, they become the super admin. A super admin is a user with the highest level of administrative privileges and control over a system. They typically have unrestricted access to all features and they can manage other user accounts and permissions within the system. The super admin is responsible for adding users to their business account, setting user permissions and roles, overseeing security measures. The super admin typically manages Business admins, internal and external users (adds, deletes, and edits the user rights) and has access to all the business data.

2. **Business Admin:** Added by the Super admin, a business admin is a user with the second-highest level of administrative privileges and control over a system. They may have restricted access to certain features (depending on the access rights granted by the super admin) and are responsible for managing internal and external user accounts and permissions within the system.

3. **Internal user:** Internal stakeholders such as admins, employees, members, associates, board members, and contractors etc. typically work full-time and are granted full rights and access.

4. **External user:** External stakeholders, such as customers, suppliers, partners, visitors/guests, and others, have limited rights and access. They are individuals or entities who provide services to your business or receive services from your business.

5. **User(s):** The individuals or groups using BlueSecures products can have various roles, such as Super admins, business admins, internal users, or external users, depending on the context.

6. **Workspace/Business account:** An account created by the super admin is typically designed for business purposes.

7. **Active user:** If the invitee (business admin/internal/external user) downloads BlueSecures app and logs into the workspace, they are active user. Active external user is indicated by a grey circle.
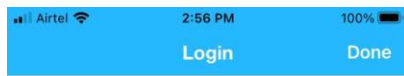
8. **Invited user:** If the invitee (business admin/internal/external user) doesn't download the app and logs into the workspace, they are invited user. Typically, invited user is indicated by black circle.

9. **Connect inbox:** Section within the app that allows users to integrate multiple messaging or communication channels into a single interface. The purpose of a Connect Inbox is to centralize and streamline communication by bringing messages from different sources into one place.

10. **Group**: Feature that allows multiple users to communicate and share messages, media, and information within a single chat space which is created with active users.

11. **Broadcast group:** Group of recipients to whom messages, announcements, or information can be sent simultaneously. The key characteristic of a broadcast group is that messages sent to this group are distributed to all members without the need for individual recipients to reply or engage in a conversation. It is a one-to-many communication method. The recipient receives the message as a 1:1 message when the sender sends a message in a broadcast group

12. **Helpdesk:** Typically refers to a specific team or department within an organization that is responsible for providing support, assistance, and solutions to customers, clients, or internal users who have questions, issues, or problems related to the products or services offered by the organization.

13. **Helpdesk Agents:** The individuals or team members in the helpdesk group responsible for providing support, assistance, and solutions to customers or clients. Agents are the frontline personnel who interact with customers to address their inquiries, resolve issues, answer questions, and provide guidance.

14. **Helpdesk Member:** Individuals who seek support, assistance, or solutions from the helpdesk team. These members are often customers, clients, or users of a company's products or services who reach out to the helpdesk for help with inquiries, issues, or questions.

15. **Participant (Group/broadcast):** An individual who is typically a member of a specific group.

Registering with BlueSecures

Step 1: The user downloads the BlueSecures app from the App Store or Play store.
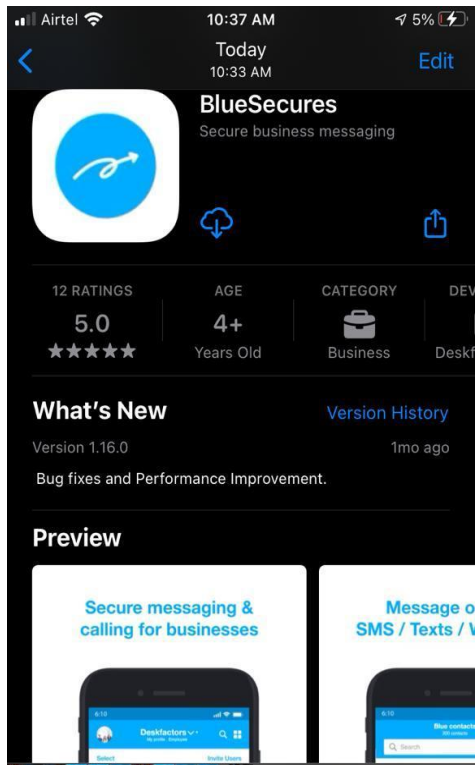
Step 2: Once the user downloads the app, inputs phone number and tick the terms & Conditions.
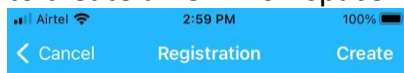

**Step 3:** The user inputs the admin name and business name, and then clicks on 'Create' to create a new workspace

Step 4: The user has to input the verification code received as an SMS for authentication.
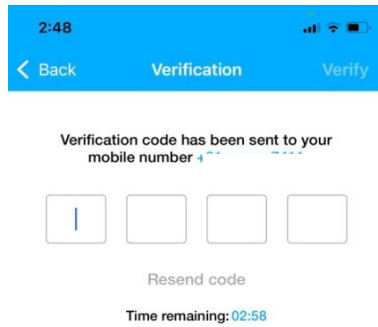
Step 5: The workspace is created, and the user becomes a super admin. They are then presented with a success screen where they can choose to either invite other users or skip this step.
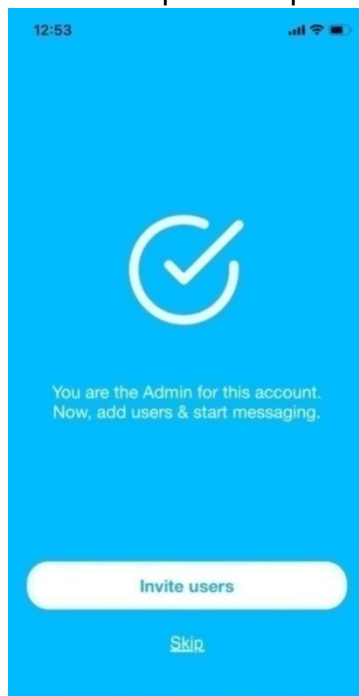
**Step 6:** When the super admin clicks 'skip' in the previous step, they will see the newly created workspace.
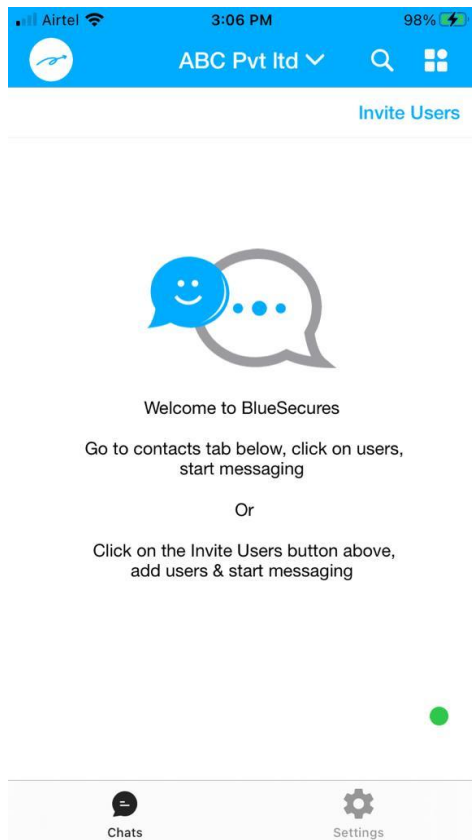
Accessing BlueWeb

BlueWeb is a web-based extension of BlueSecures, which allows users to access their BlueSecures account and messages from a computer's web browser. BlueSecures app users, including admins, internal users, and external users, should click the menu button in the Connect Inbox and select 'BlueWeb.' Afterward, they should visit the BlueWeb page at https://web.bluesecures.com/ and scan the QR code using their mobile's scanner.
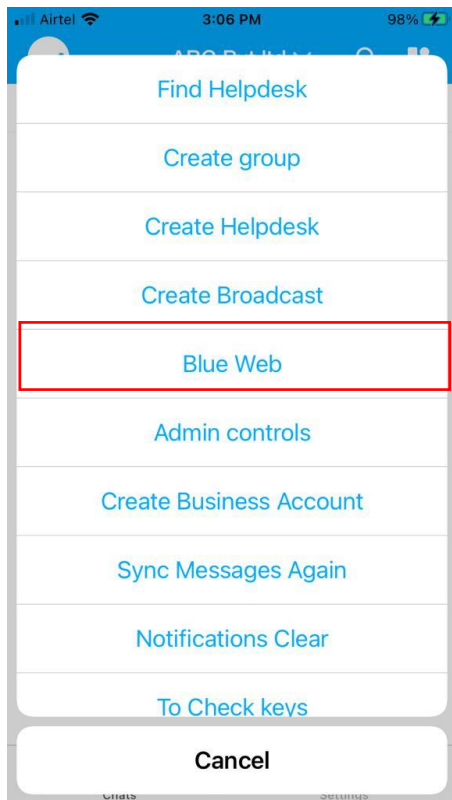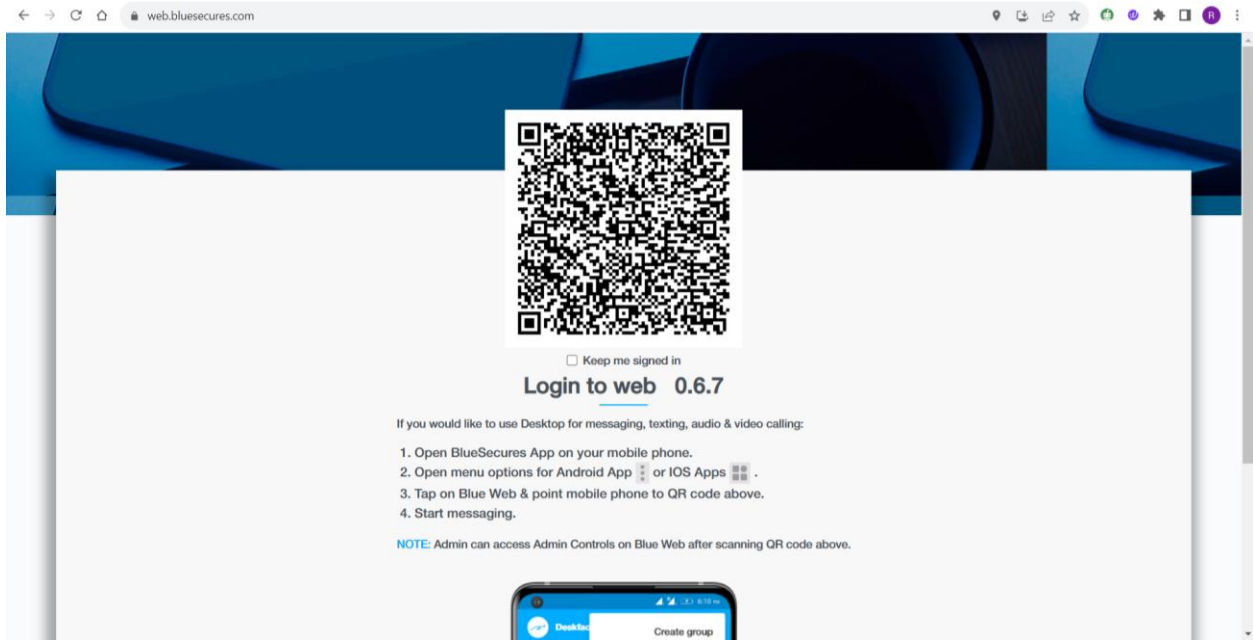
Once the user logins to the BlueWeb, the user can see all the contacts, messages will be synced as that of the mobile.
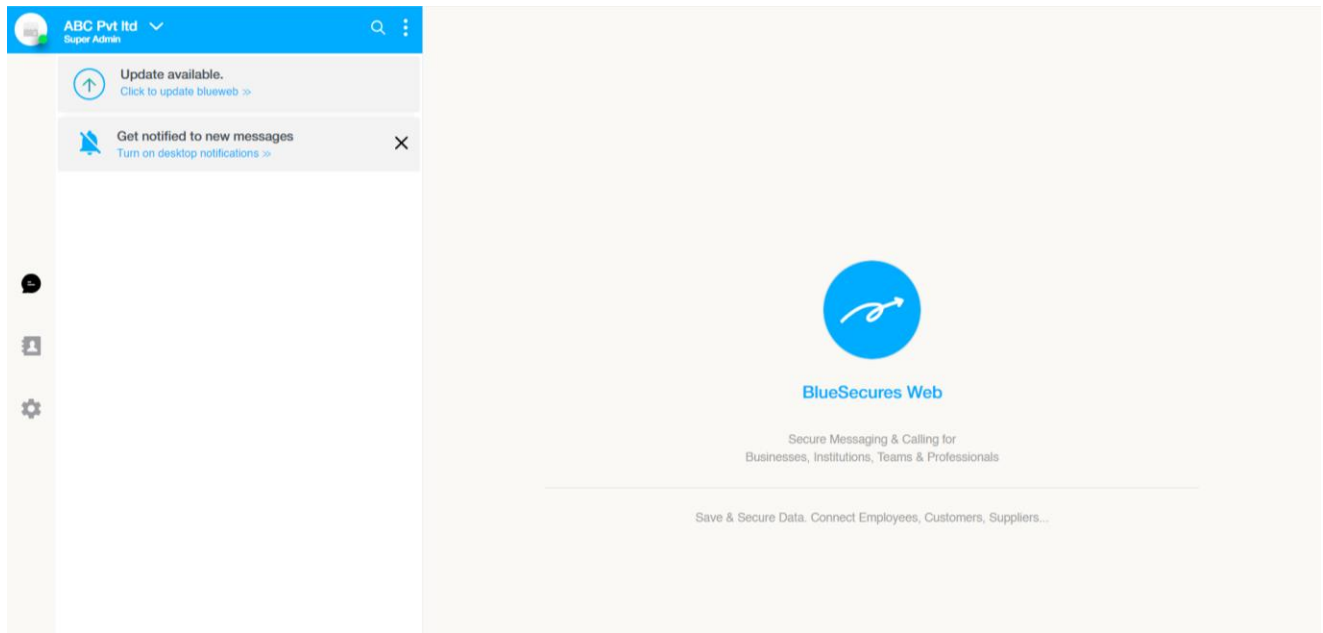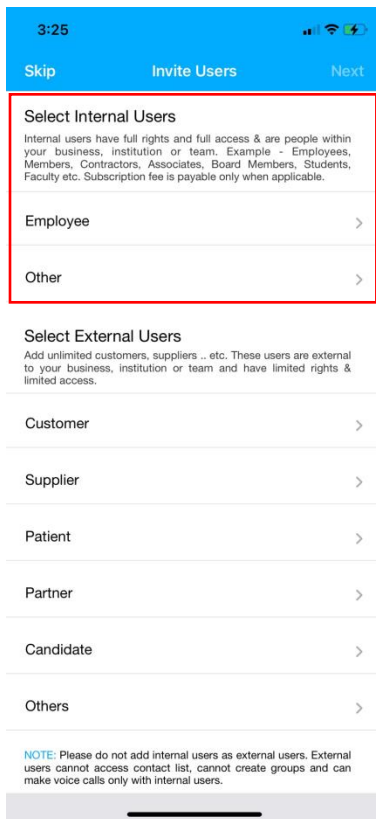
# Inviting internal users to BlueSecures from mobile

Step 1: The admin invites the internal user after registering the workspace or from the connect inbox or from the admin controls as shown below.
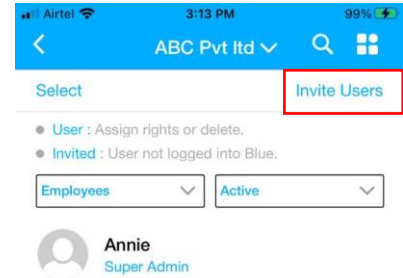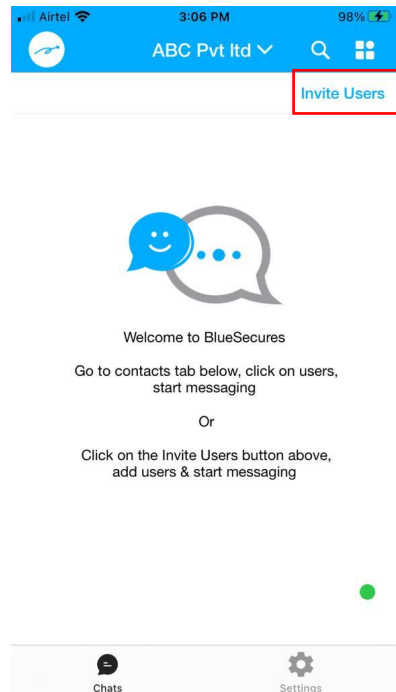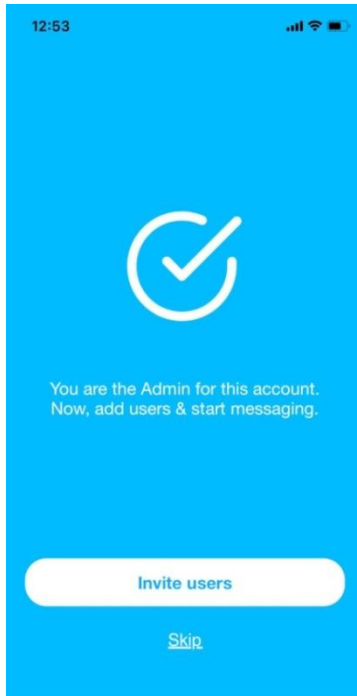
Step 2: The admin must select the user type in 'Select internal user' field which can be employee or others.
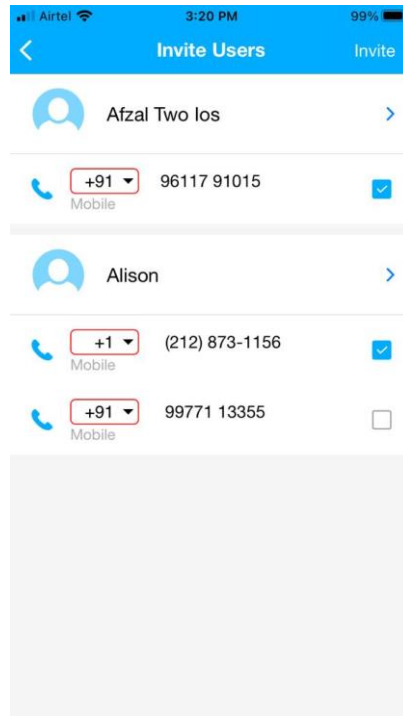
Step 3: The admin can either select the contacts from the contact list (single or multiple contacts) or manually add the contacts by tapping on 'New Contact'.
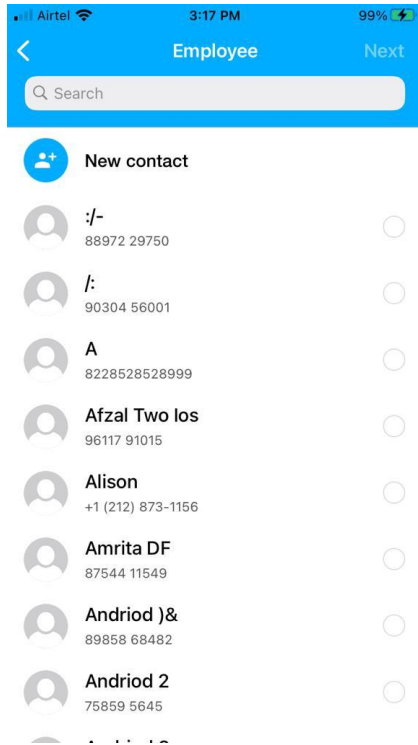
Step 4: The admin has to input the Invitee's name, phone number, and location. If selecting from contacts, as shown in the previous screen, they should choose the location and click on 'Invite'.
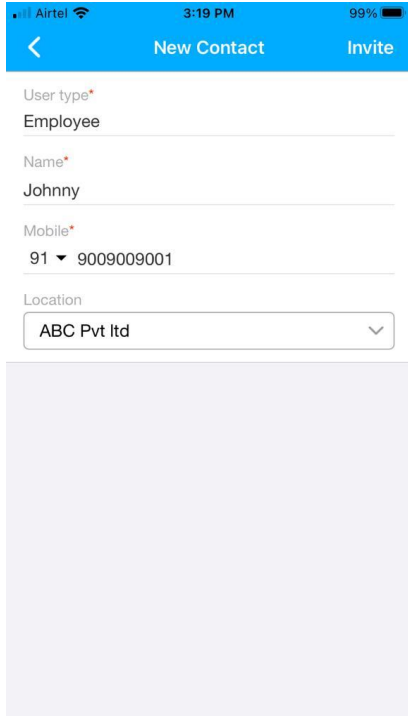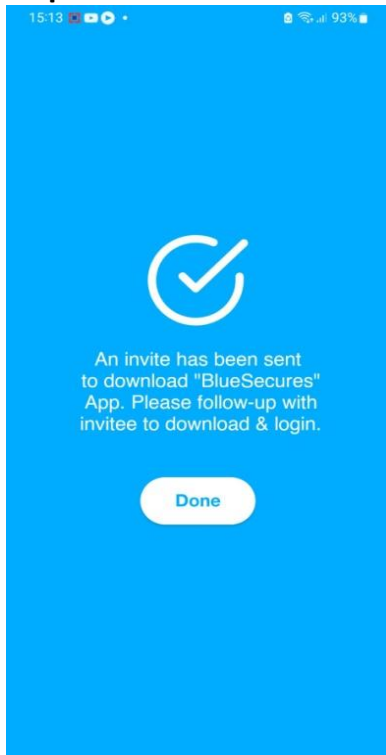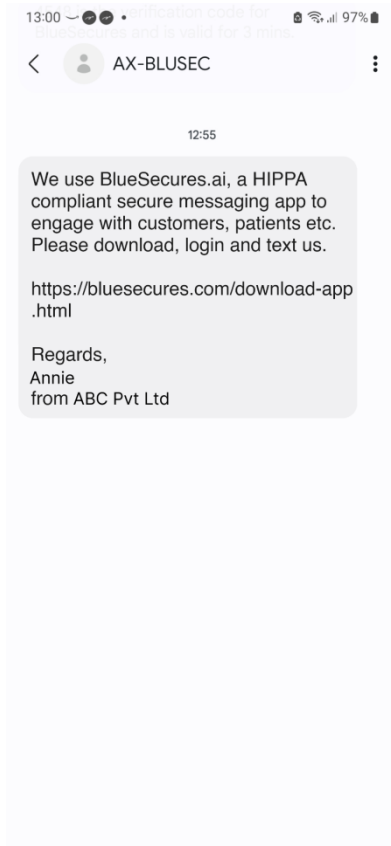
Selecting from new contact   **Selecting multiple contacts from the contact list**

**Step 5**: The admin will see the success screen regarding the invite sent.

The invitee receives SMS/text notifications instructing them to download BlueSecures as shown below. A user who is already logged into another workspace will be notified when added to a new workspace.
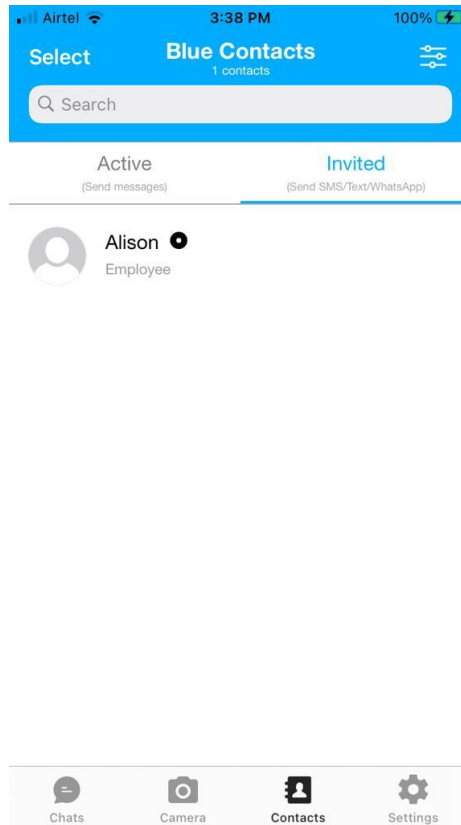
After the invite, the user will see the invitee's details on the contacts page of BlueSecures.

i) If the invitee joins the workspace, the admin will see their details in 'Active tab' of contacts.
ii) If the invitee doesn't join the workspace, the admin will see their details in 'Invited tab' of contacts.
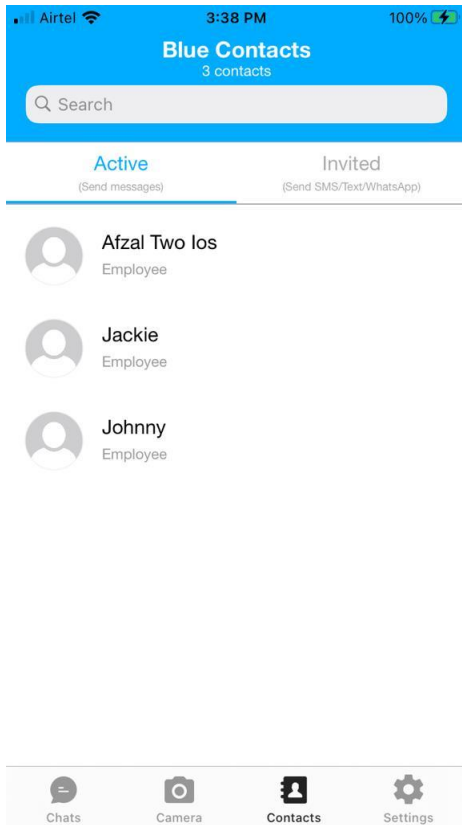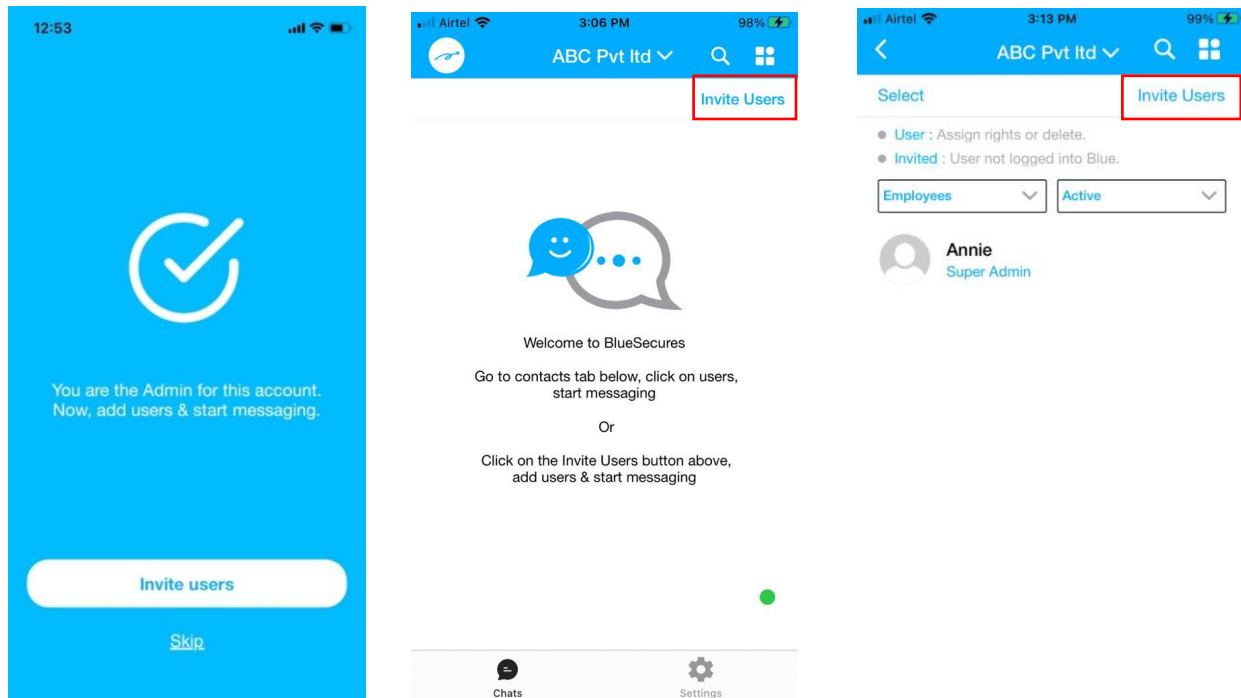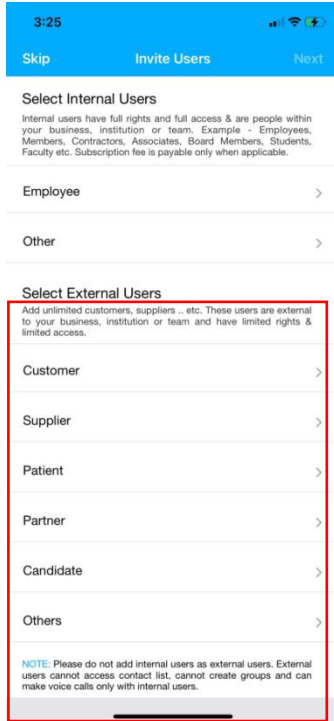

Active tab   **Invited tab**

Inviting external users to BlueSecures from mobile

Step 1: The admin and the internal user can invite external user (upon having the user rights) after registering the workspace or from the connect inbox or from the admin controls as shown below and clicks on 'Invite' button in the connect inbox.

Step 2: The user must select the user type in 'Select external user' field which can be customer, supplier, patient etc.

Step 3: The user can either select the contacts from the contact list (single or multiple contacts) or manually add the contacts by tapping on 'New Contact'.
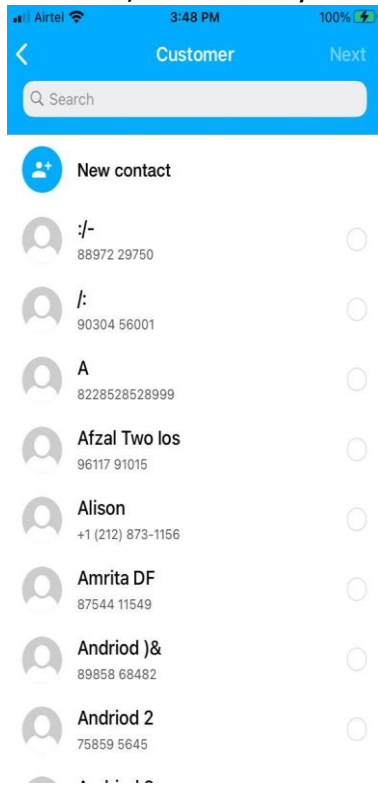
Step 4: The internal user has to input the Name, phone number, location or if selecting from Contacts as shown in the previous screen, they should choose the location and click on 'Invite'.
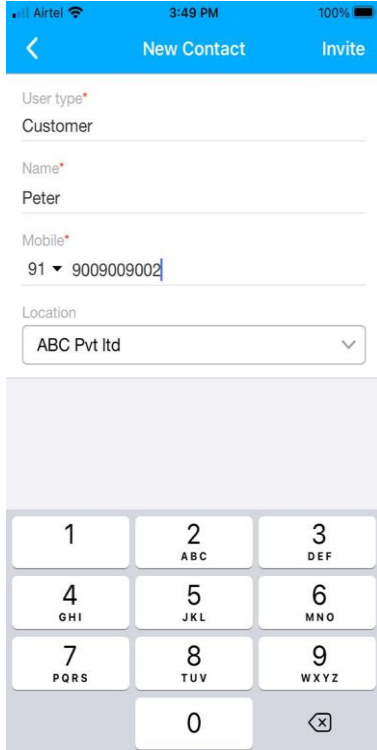
Selecting from new contact
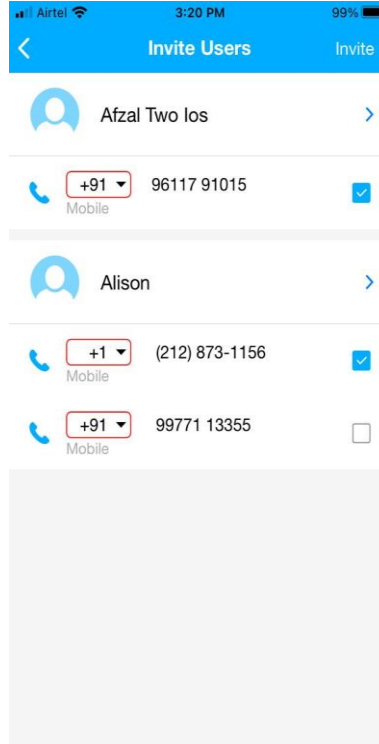
Selecting multiple contacts from the contact list

Step 6: The internal user receives a pop-up screen asking whether to display their contact details to external users. If the user checks the checkbox in the pop-up, their contact details become visible to external users once they log in to the app.
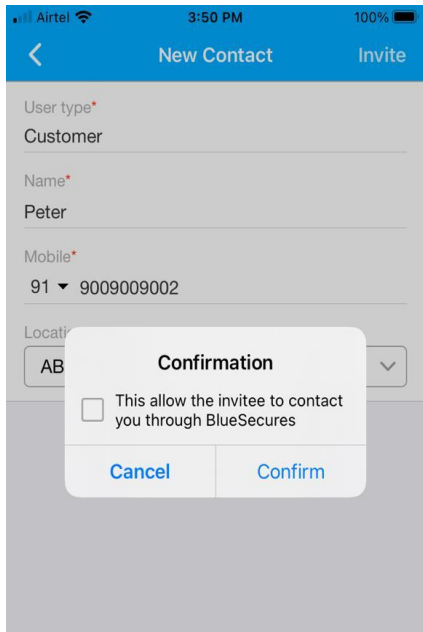
Step 7: The admin will see the Success screen regarding the invite sent and the invited user details will appear in the contact list of the workspace.
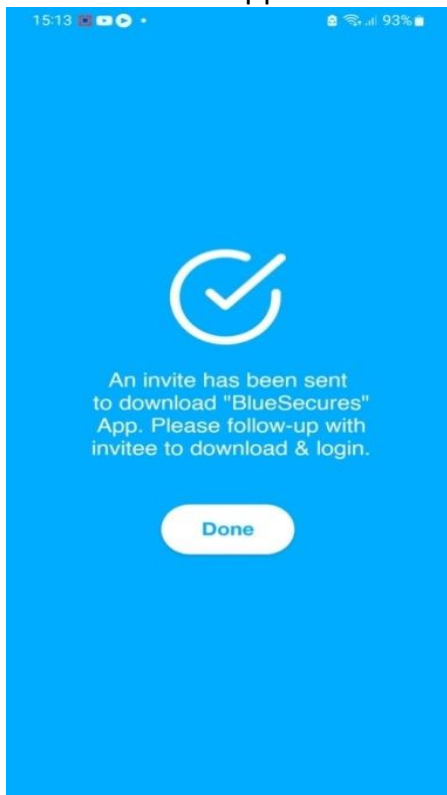
After sending the invite, the user will find the invitee's details on the contacts page of BlueSecures, either in the 'active' or 'invited' list, depending on the invitee's login status.
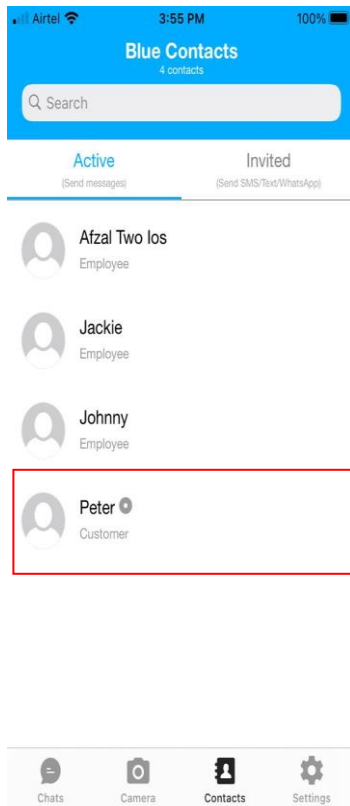
The invitee receives SMS/text notifications instructing them to download BlueSecures. .
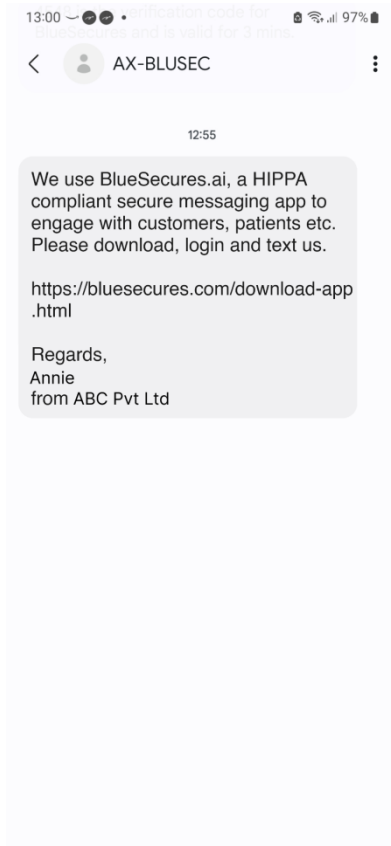A user who is already logged into another workspace will be notified when added to a
new workspace.

Inviting users to BlueSecures from BlueWeb (Single invite)

Step 1: When the admin and internal user (upon having user rights) in contacts tab clicks on 'Invite' button, will find an option 'Invite user'. The user can invite one user at a time from BlueWeb. Internal user can invite external user only.
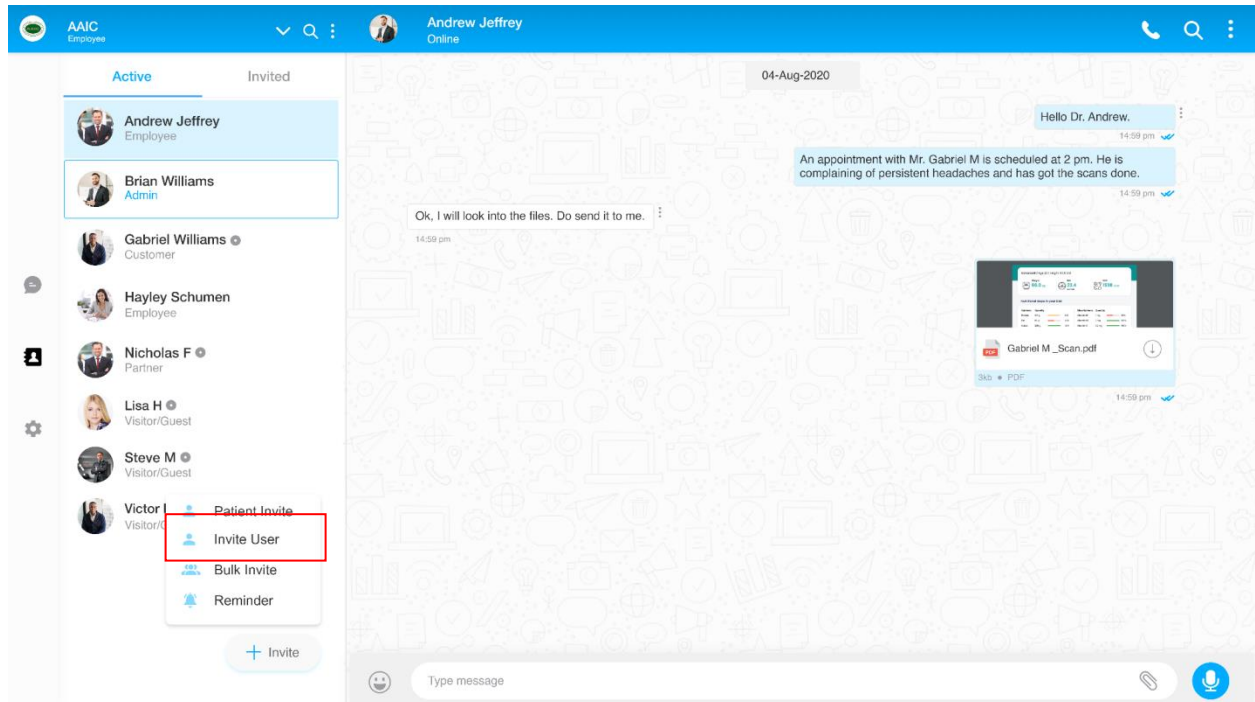
Step 2: The user has to update user type, invitee name, mobile number, and location. After entering this information, while inviting the external user, they receive a pop-up screen asking whether to display their contact details to external users. If the user checks the checkbox in the pop-up, their contact details become visible to external users once they logs into the app.

Step 3: After the invite is sent, the invitee will receive an SMS/Text from BlueSecures. If the user is already logged into BlueSecures and added to another workspace, they will receive a notification about the newly added workspace.
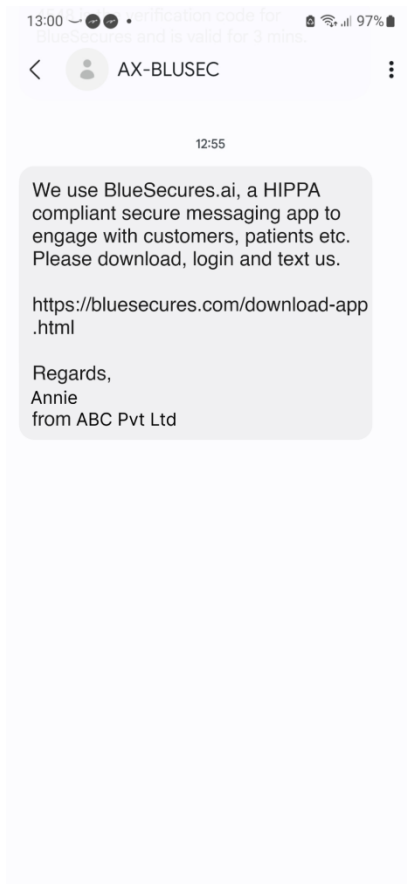
Inviting users in Bulk to BlueSecures

Step 1: When the admin in the contacts tab click on the 'Invite' button, they will find an option for 'Bulk Invite' in BlueWeb. Admin can invite both internal and external users in bulk at a time.
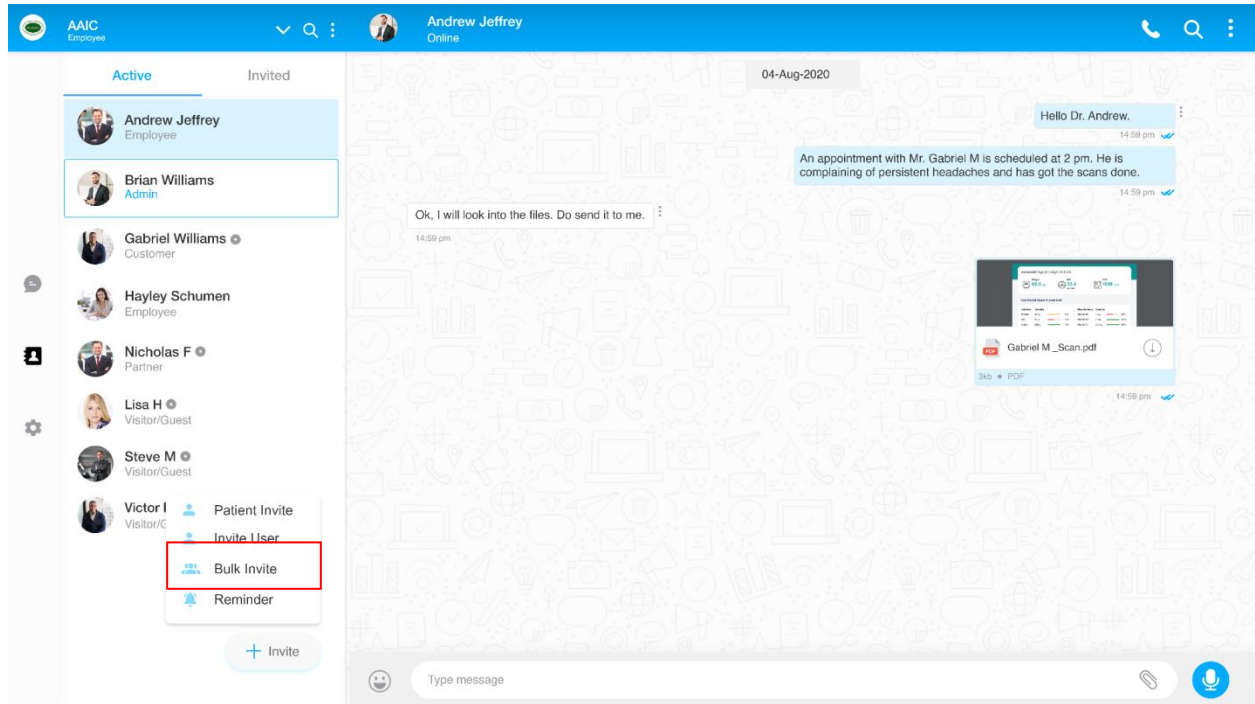
Step 2: The admin needs to download the template, fill in details about the invitees, such as name, contact number, user type, etc., and then upload the file.

Step 3: The admin uploads the file with the necessary details filled in it.
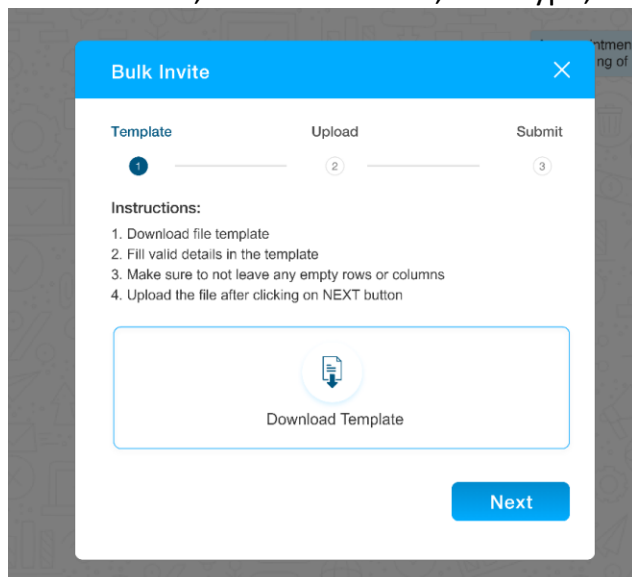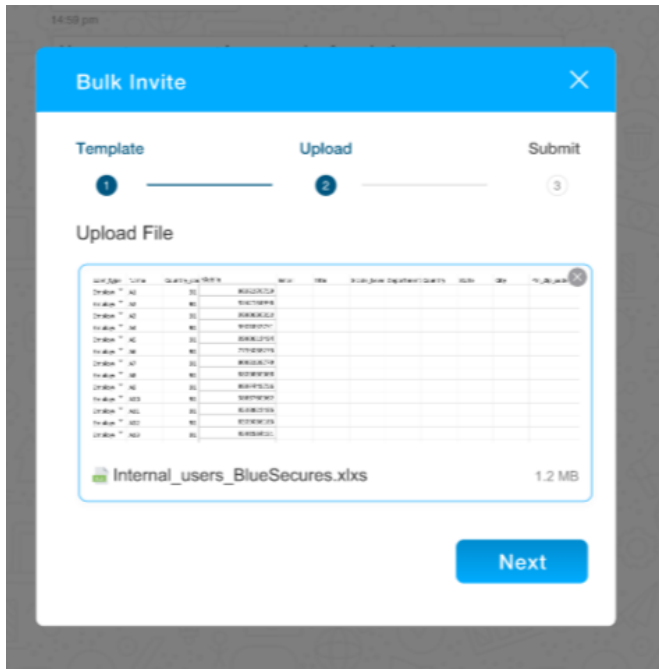

Step 4: While inviting external user, they receive a pop-up asking whether to display their contact details to external users. If the admin checks the checkbox in the pop-up, their contact details become visible to external users once they logs into the app.
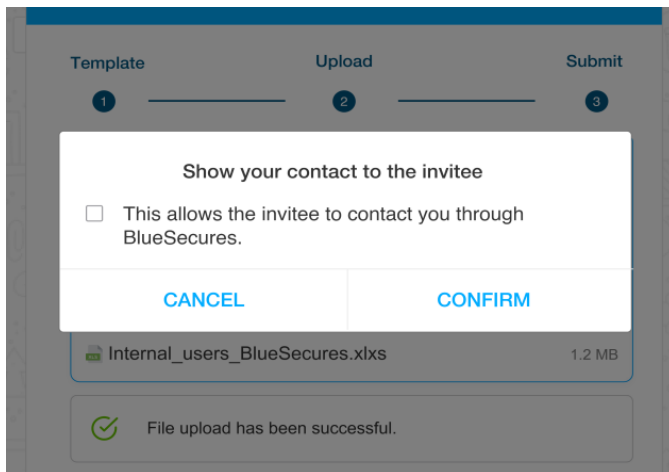
Step 5: Once the file is successfully uploaded, the invite will be sent to all the invitees, and they will receive it via SMS/Text.
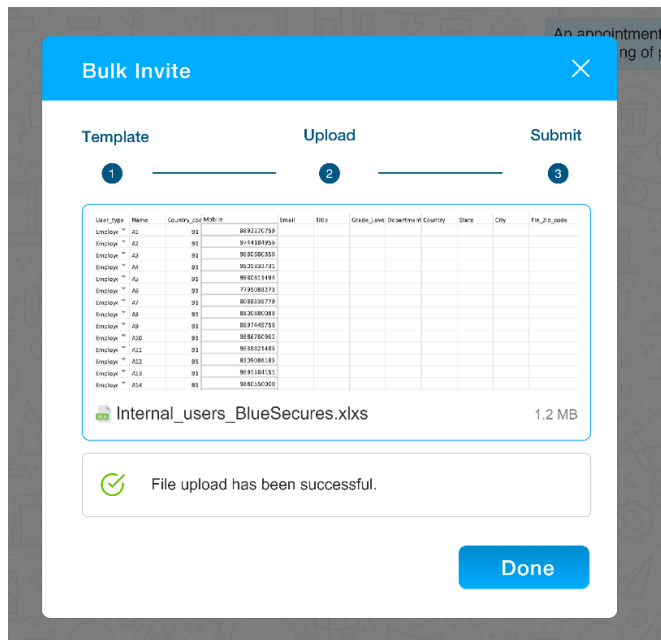
Invite Patient to BlueSecures (applicable only for the client with Patient ID and EMR)

Step 1: The admins and internal users can invite patients to BlueSecures. Users need to select the 'Patient invite' option when tapping the 'Invite' button in the contacts tab.
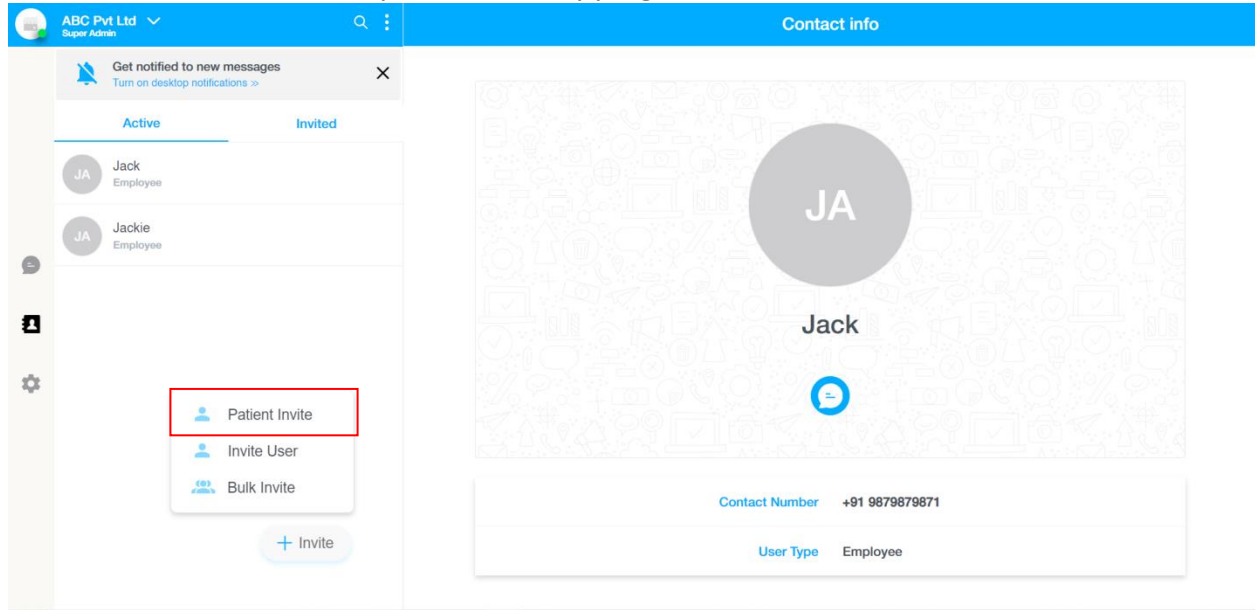
Step 2: When the admin updates valid patient ID, the name and mobile number field will be filled automatically. Upon clicking on 'Save and Invite' button, the invite will be sent.
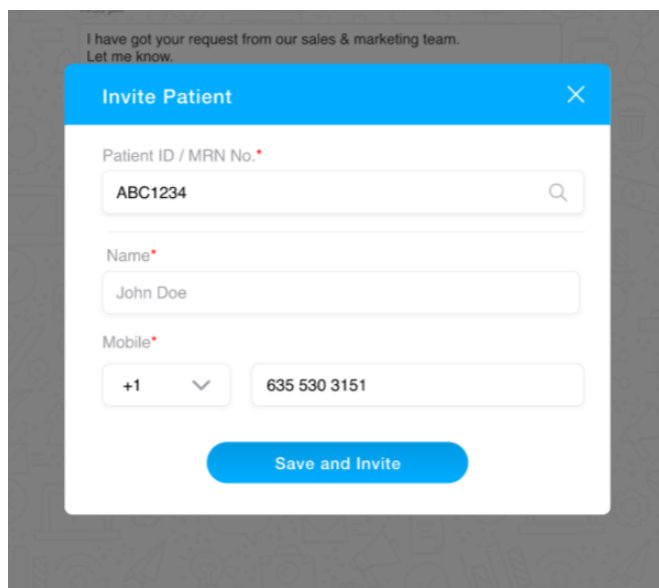
Step 3: The invite should be sent and all the invitees will get SMS/text to download BlueSecures app as shown below. If the user is already logged into BlueSecures and added to another workspace, they will receive a notification about the newly added workspace.
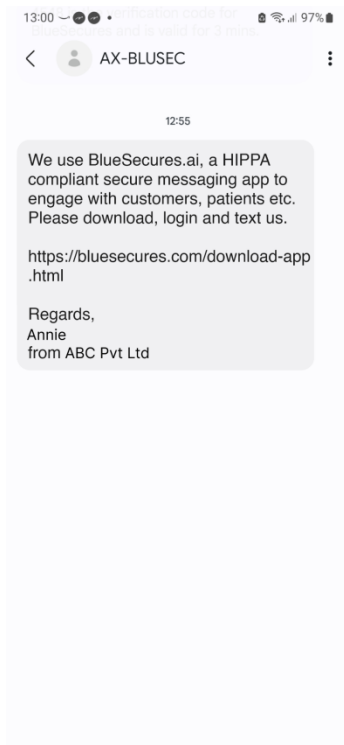
Connect inbox

After creating a workspace or logging into BlueSecures, the user lands in the Connect Inbox.

- At the top, users can see their workspace name. By clicking the dropdown button next to the workspace name, they can switch between workspaces.
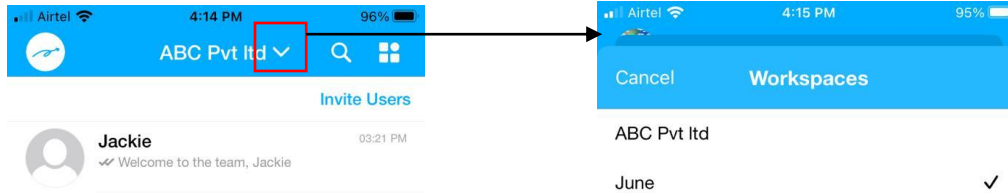
- Only admin of the workspace can change the profile picture upon tapping on the profile picture icon. The admin can either take a picture or choose photo from the device storage and update the profile picture of workspace.
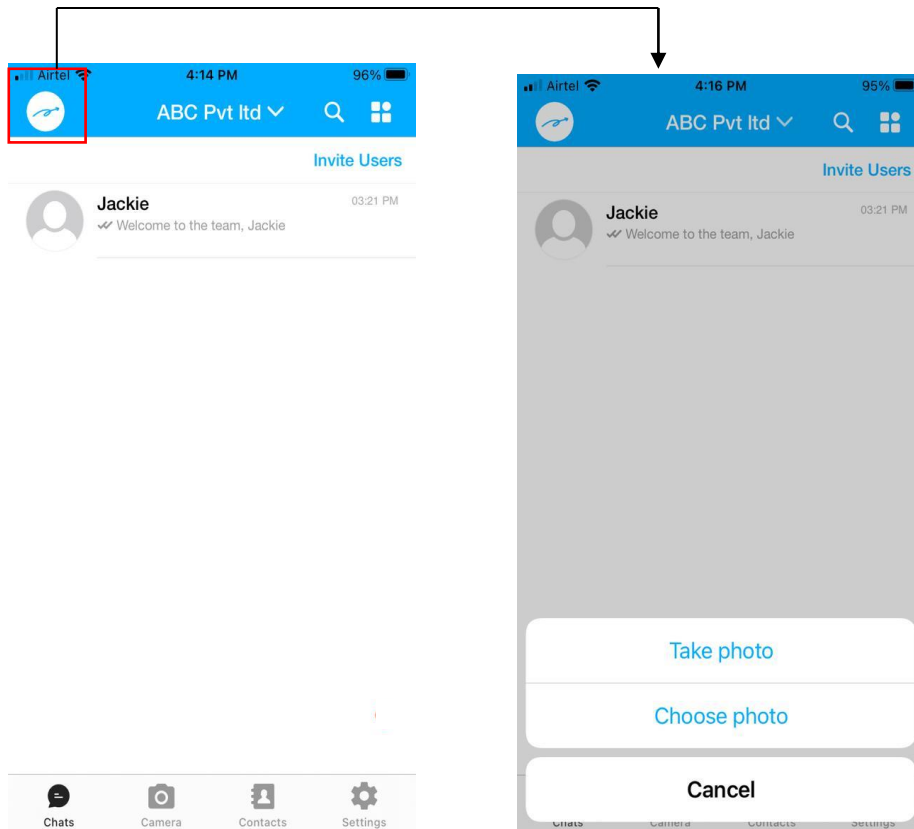
- The user can also search for workspaces, user name, and contact number in the search field.
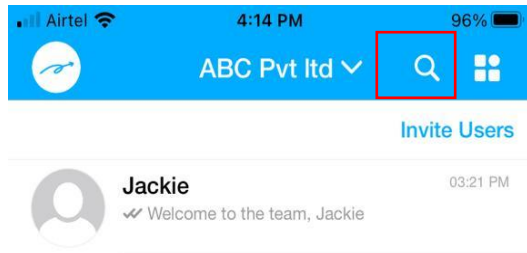
- Next to the search button, there is a menu button where users will find various options, such as creating groups, broadcasts, accessing BlueWeb, creating a Helpdesk, finding a Helpdesk, and viewing information about the organization. Detailed explanations of the menu options are provided below. The available options may vary depending on the user's type and their user rights.
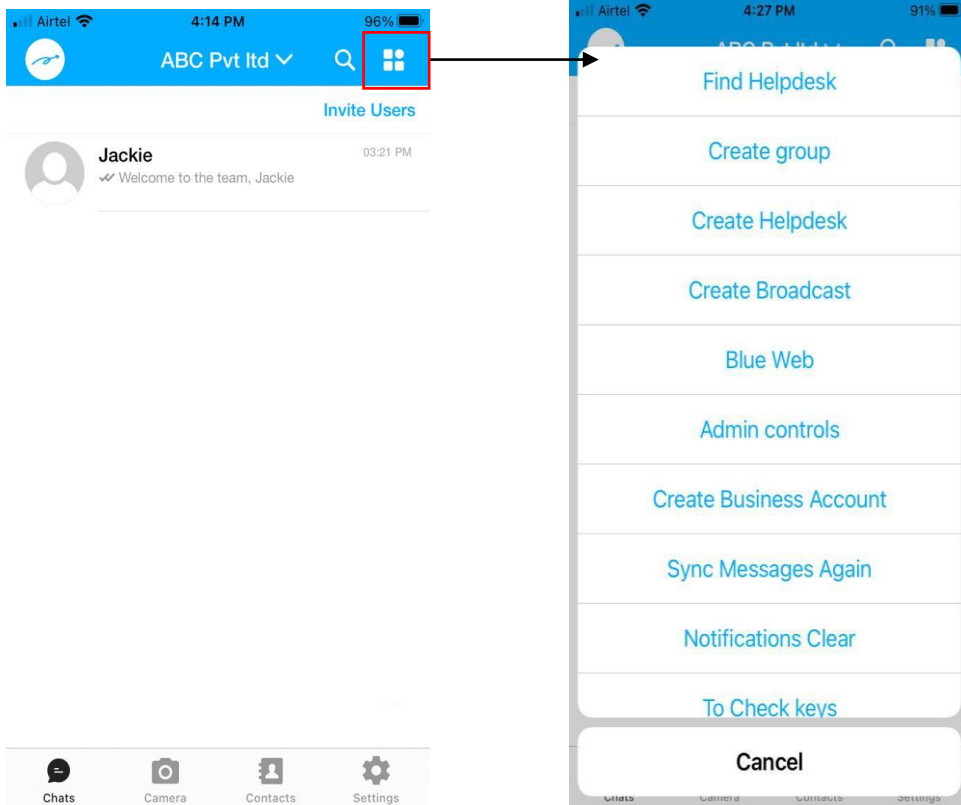
- Upon tapping on the menu in connect inbox and selecting 'About Us', the users can view their organization details.
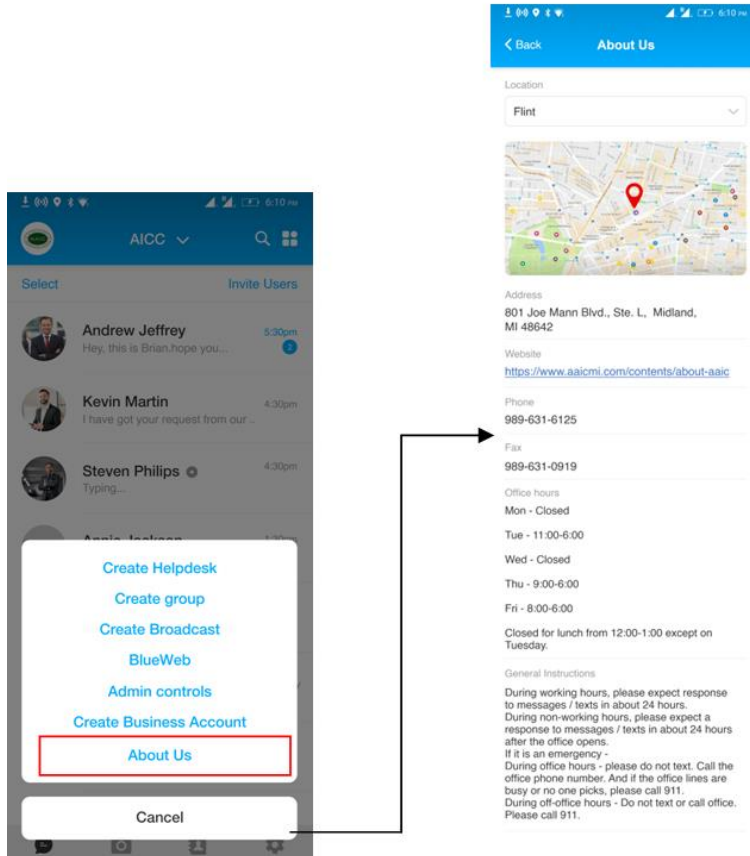
- When the user taps on 'Create business account' from the options, they can create a new workspace. The phone number will be auto- populated and the remaining flow remains same as registering the workspace with BlueSecures.
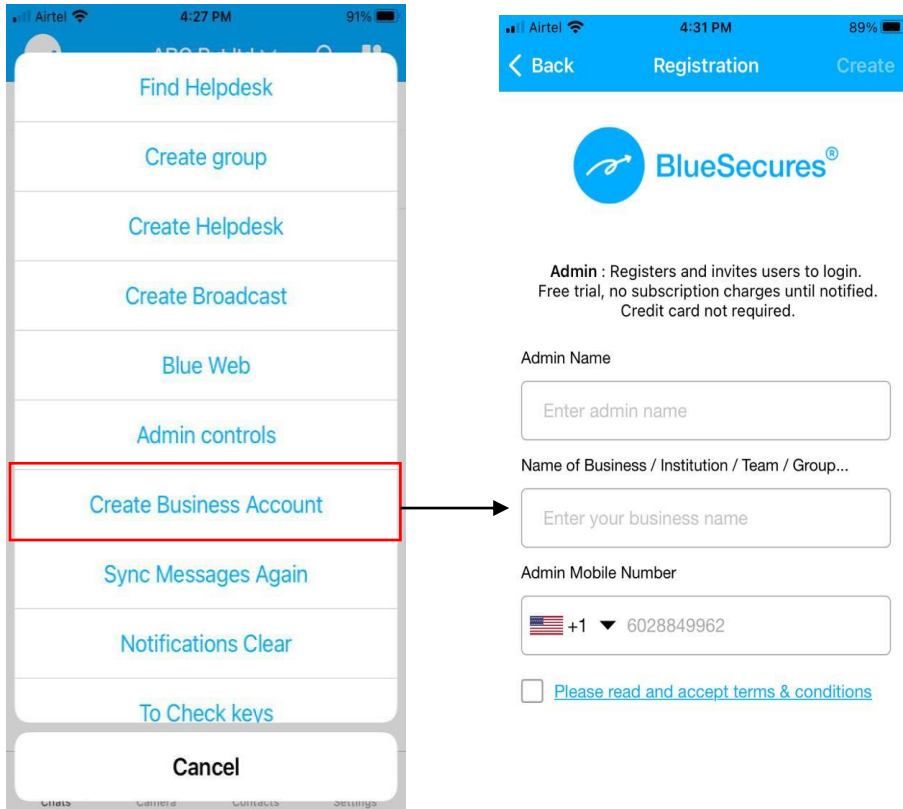
- Below the header, the user will find an option to invite the user, please refer to the above flow for inviting the user.
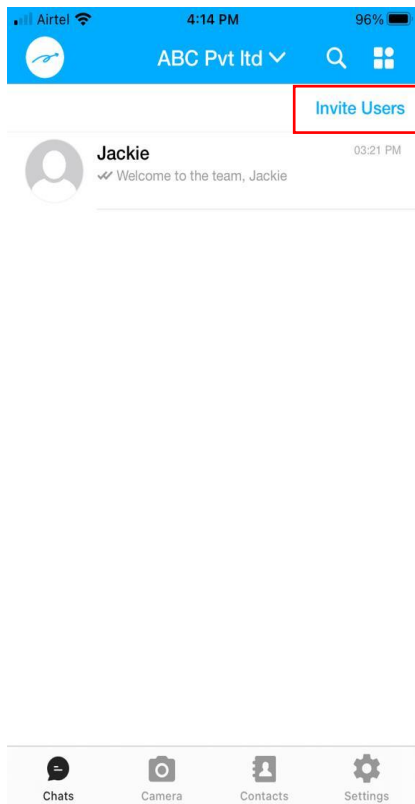
- The user will see the chats below invite user. Here, they can access 1:1 chats, group chat, and broadcast group, and helpdesk groups.
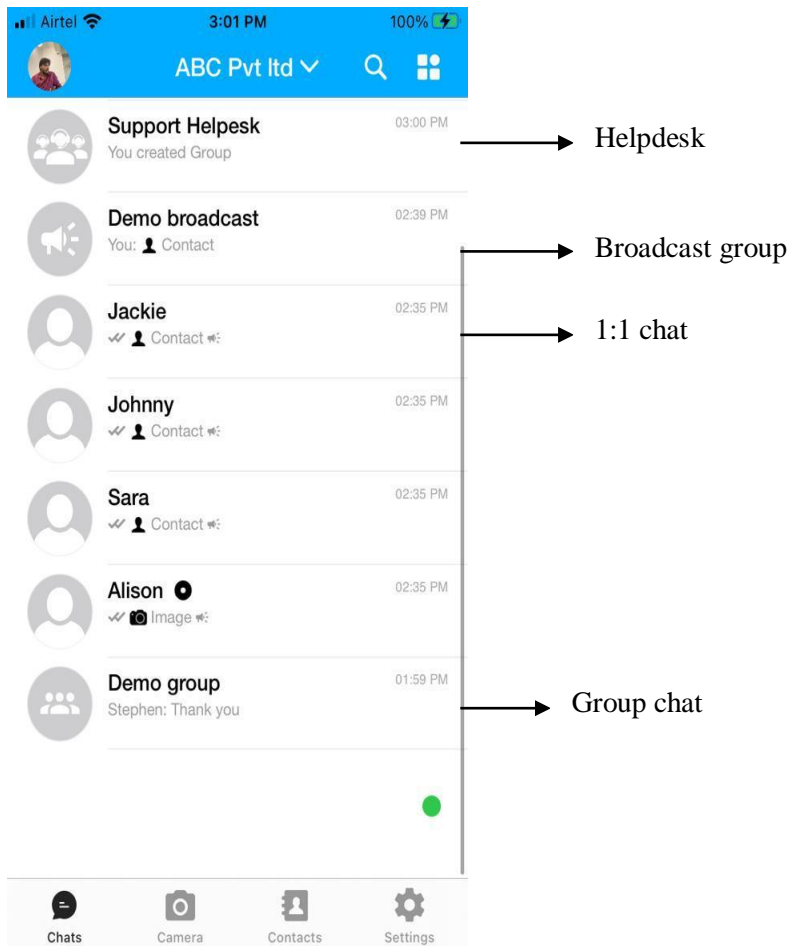
Camera

- The users can access the Camera page by clicking the 'camera' button in the Connect Inbox.
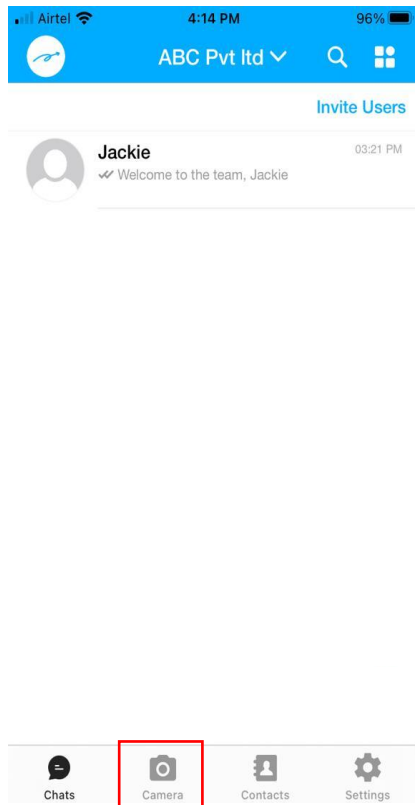
- The user can either capture photo/video or import from the phone's storage. Upon long-press on the camera button, they can capture the video.
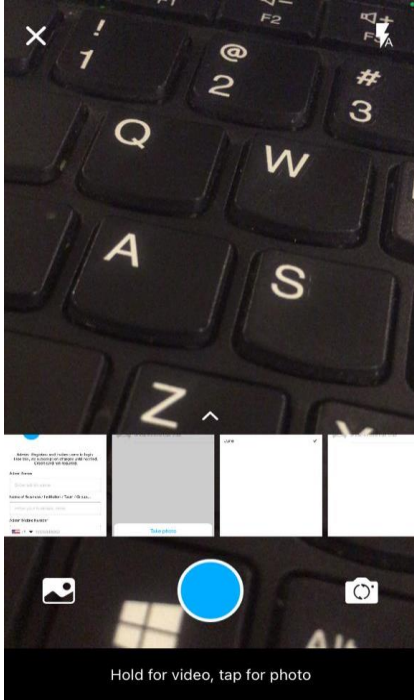
- The user can edit the image or video, including cropping, deleting, adding emojis, text, and highlights, or download to saved media.
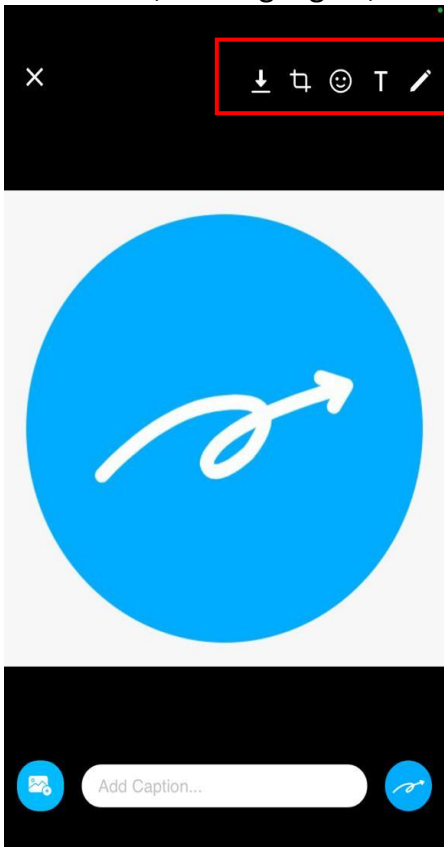
- Tapping 'download' button while capturing photos / videos or importing from the phone's storage, allows users to save the files to 'Saved Media' in their user files without sending them to any contacts.
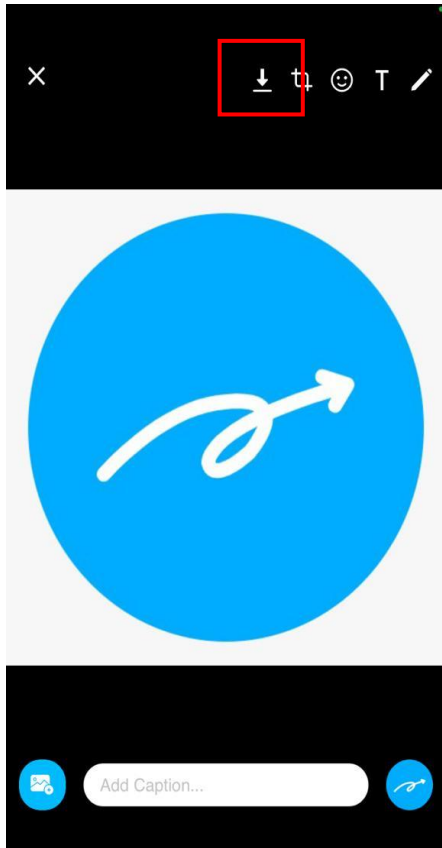
Contacts Page

- The users can access the Contacts page by clicking the 'Contacts' button in the Connect Inbox.
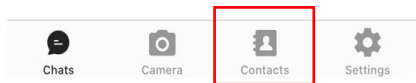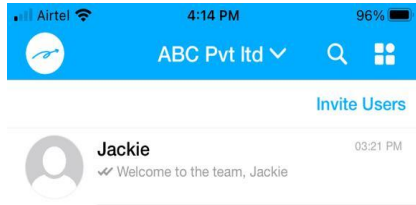
- For the admin and internal users, the page features 'Active' and 'Invited' tabs. Invited users who have logged into BlueSecures are listed under 'Active,' while those who haven't logged in appear under 'Invited.'

Active tab

Airtel 📶 🛜	3:38 PM	100% ⚡

Blue Contacts
3 contacts

🔍 Search

Active	Invited
(Send messages)	(Send SMS/Text/WhatsApp)

Afzal Two Ios
Employee

Jackie
Employee

Johnny
Employee

💬 Chats   📷 Camera   👤 Contacts   ⚙️ Settings

Active tab

Invited tab

Airtel 📶 🛜	3:38 PM	100% ⚡

Select   **Blue Contacts**   ⚙️
1 contacts

🔍 Search

Active	Invited
(Send messages)	(Send SMS/Text/WhatsApp)

Alison ⚫
Employee

💬 Chats   📷 Camera   👤 Contacts   ⚙️ Settings

Invited tab

- For the external user, the contacts of the internal user who has given permission to show their contacts will be only displayed.
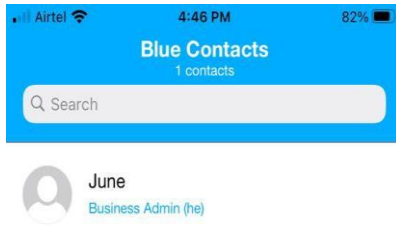
- Users can search for contacts by name and mobile number.
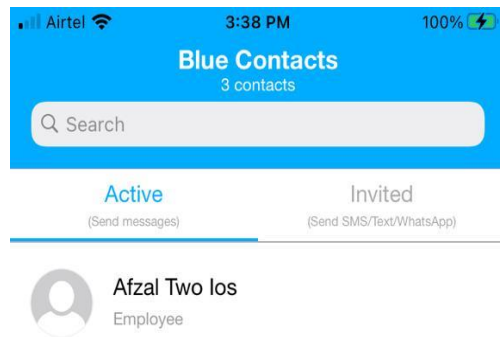
- Tapping on any contact in the 'Active' tab takes the user to the 1:1 chat screen, and the recipient receives the message on BlueSecures.
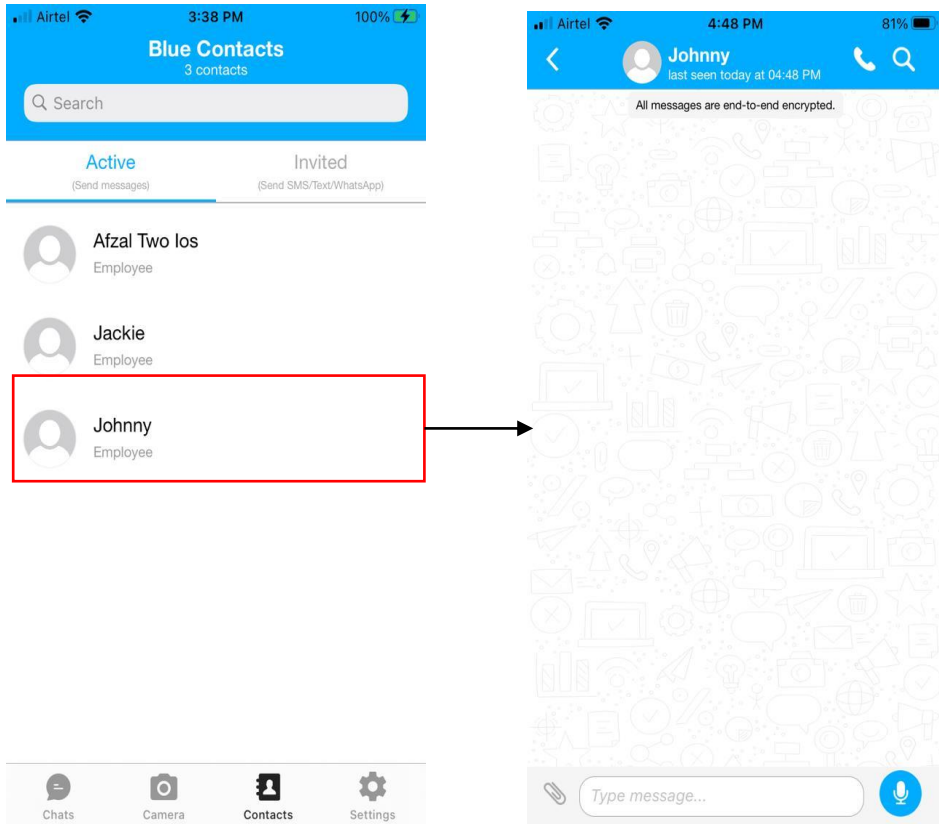
- Tapping on any contact in the 'Invited' tab also opens the 1:1 chat screen, and the recipient receives the message through WhatsApp/SMS.
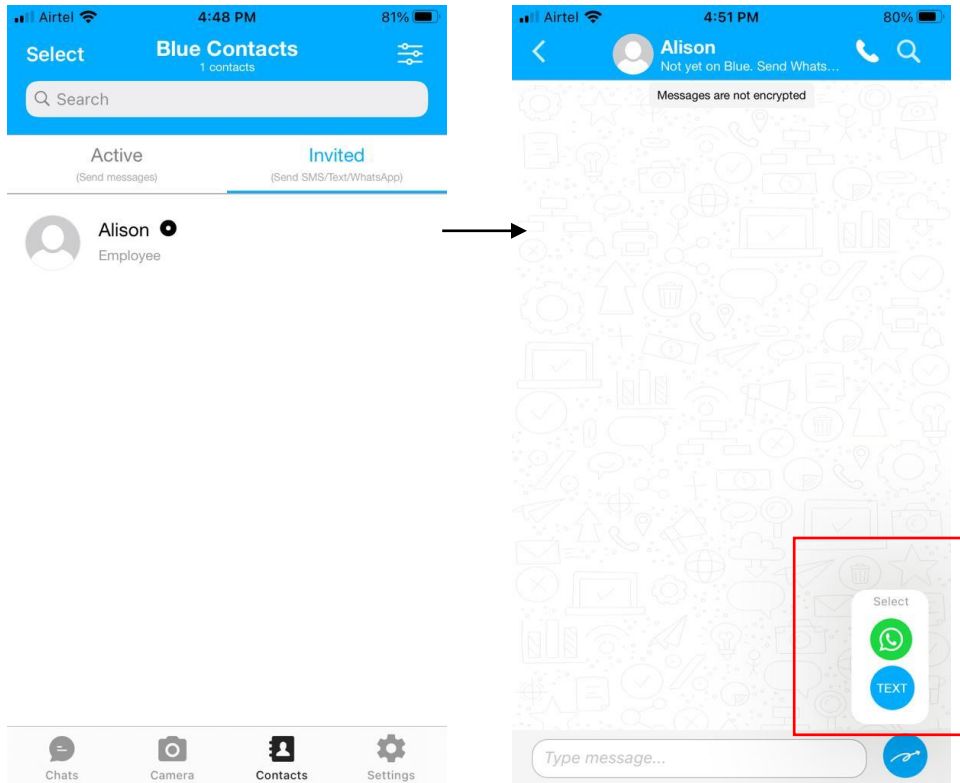
Settings Page

In BlueSecures, users can access the settings page by clicking the 'Settings' button in the Connect Inbox. On this page, users will find their user files and profile.
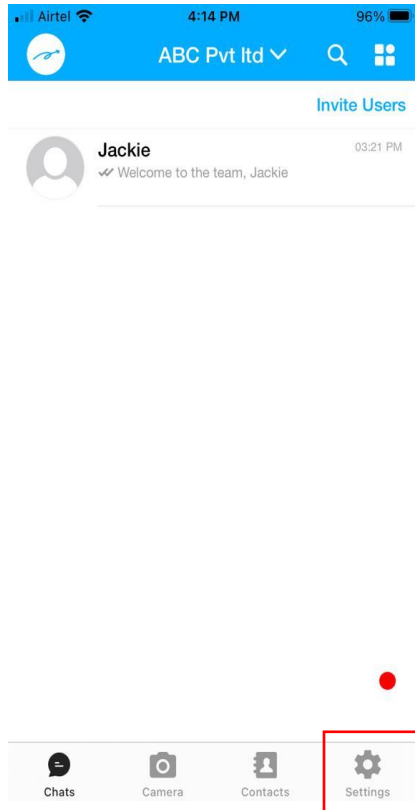
i)   Edit profile page:

When the user taps on the profile, they can update their profile picture, view their own details, and choose to hide their mobile number.
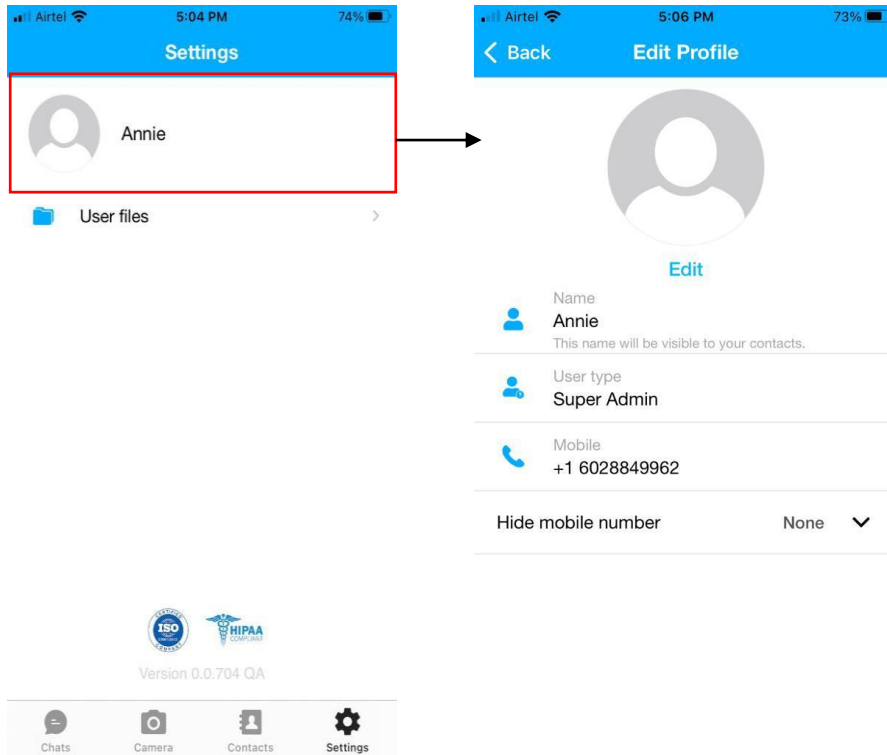
a. Hide mobile number:

The users can mask their mobile number in the settings to prevent any other user viewing their number.

The internal users and admins can choose to hide the number from the internal users or external users or all users as shown below.
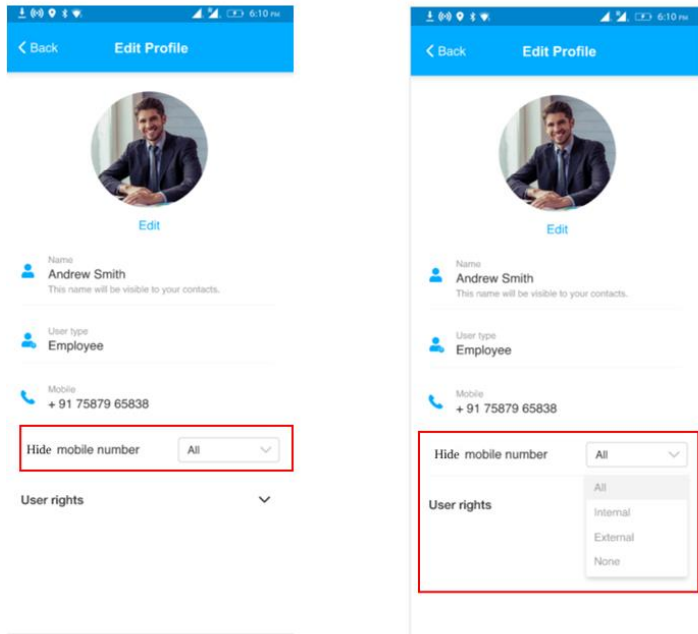
The external users can also mask their phone number in the settings. They can choose to hide the number from all the internal users.
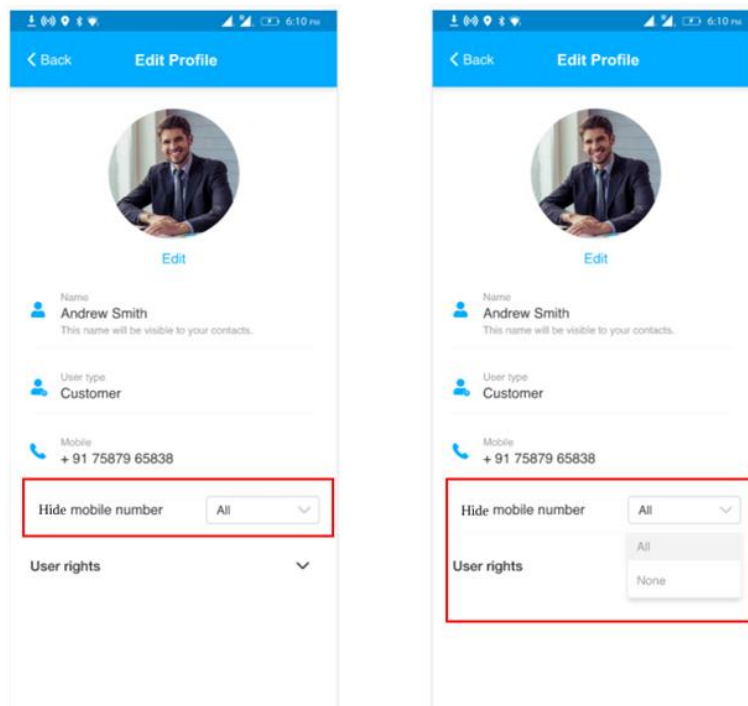
ii)   User files:

Media files in chats (1:1 chat, group chat, broadcast chat, and helpdesk) are saved in the 'User files' on BlueSecures. If the user has permission to save to their device, the files are also stored on their device.
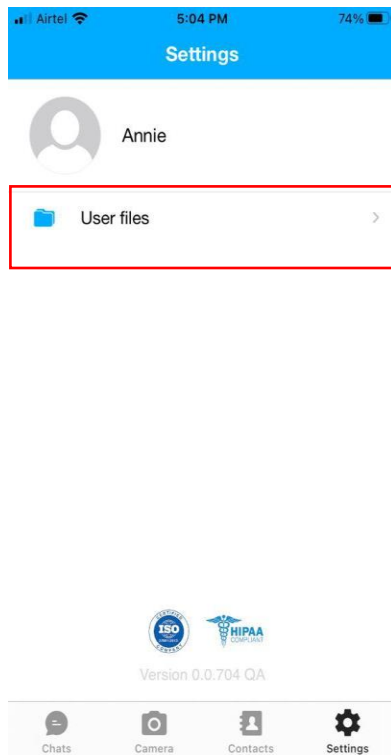
- In the user files, there will be three tabs: Images, Links, and Docs, and the files will be saved in their respective folders.
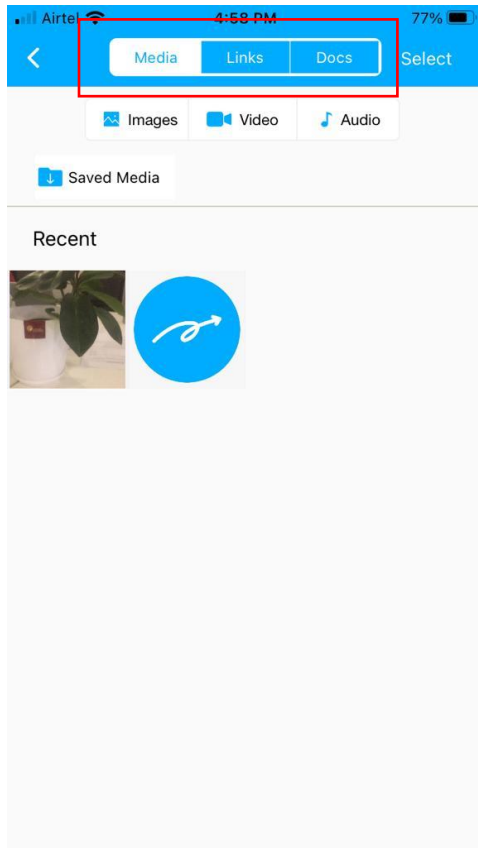
- When the user taps on 'Media', they can see images, video, and audio files in their respective folder.
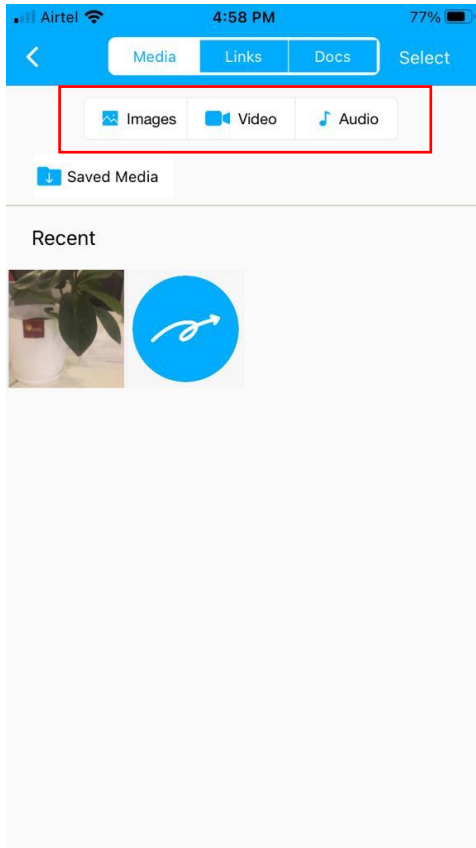
- In the 'Media' page, the user will find a folder called 'Saved Media.' When a user captures images/videos or shares images/videos from external apps to BlueSecures, they can choose to save it to their user files without sending it to any users.
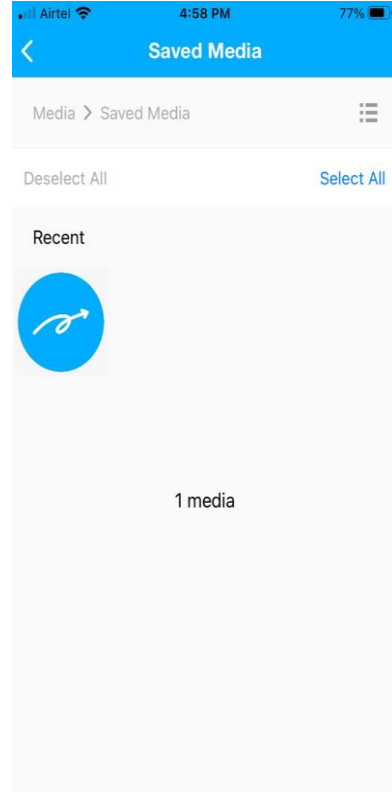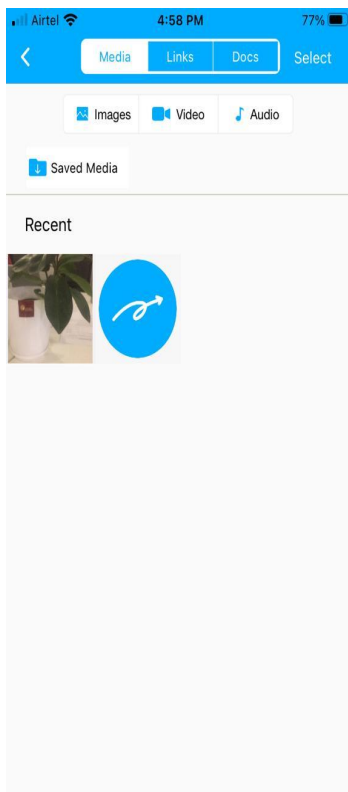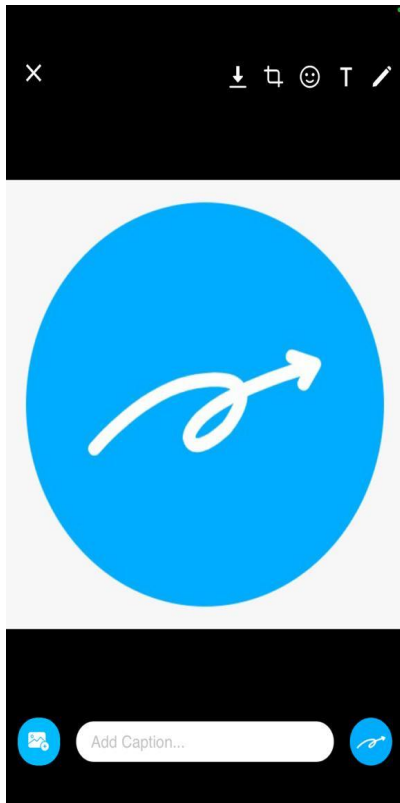
- From the user files other folder and save media folder, the users can send, share to external apps, download to the device, and delete the media files.
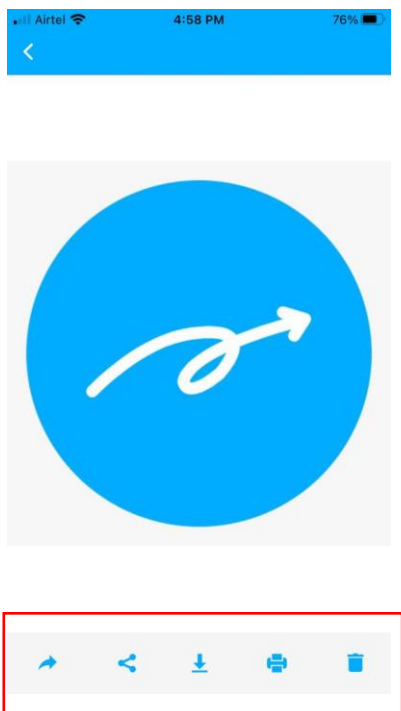
Admin Controls

a. User rights:

Screen 1: Access to admin controls is limited to Super admin and Business admin. In the Connect Inbox menu, the 'Admin Controls' option allows admins to view and edit user rights for users within their workspace.

Screen 2: The admin can filter users by type and status and also search for users using the search button at the top-right of the screen.

Screen 3: When the admin taps on any user name in screen 2, the user's details and rights are displayed. The admin can edit the rights by tapping the toggle button in the 'Edit user rights' field.
The user who rights is changed will get notified.
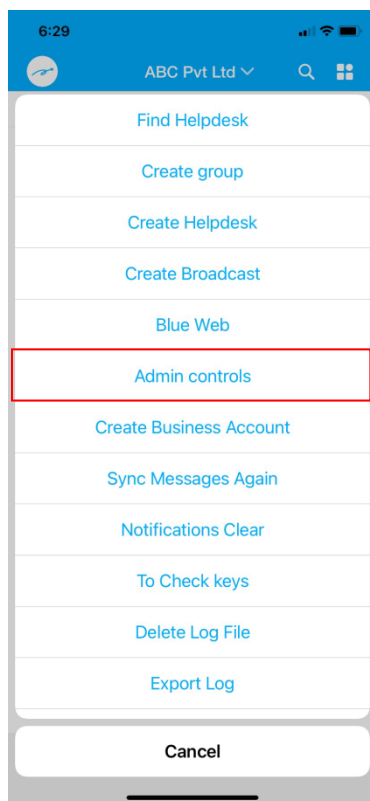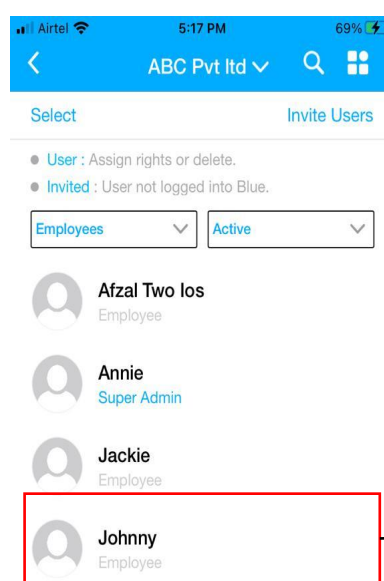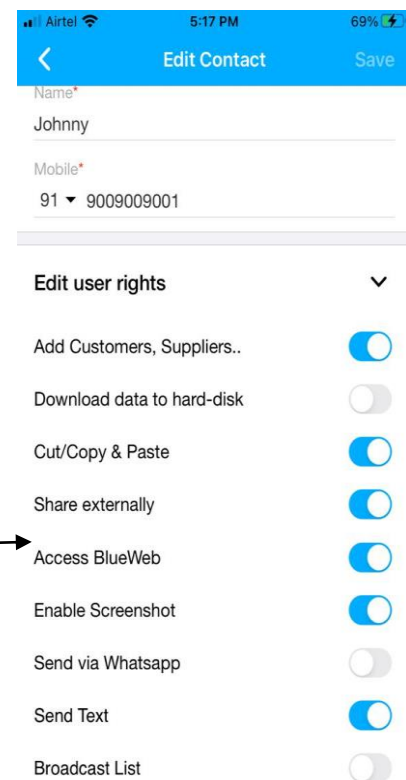
| 1 | 2 | 3 |

For the external users: External user will have only few rights as shown below.
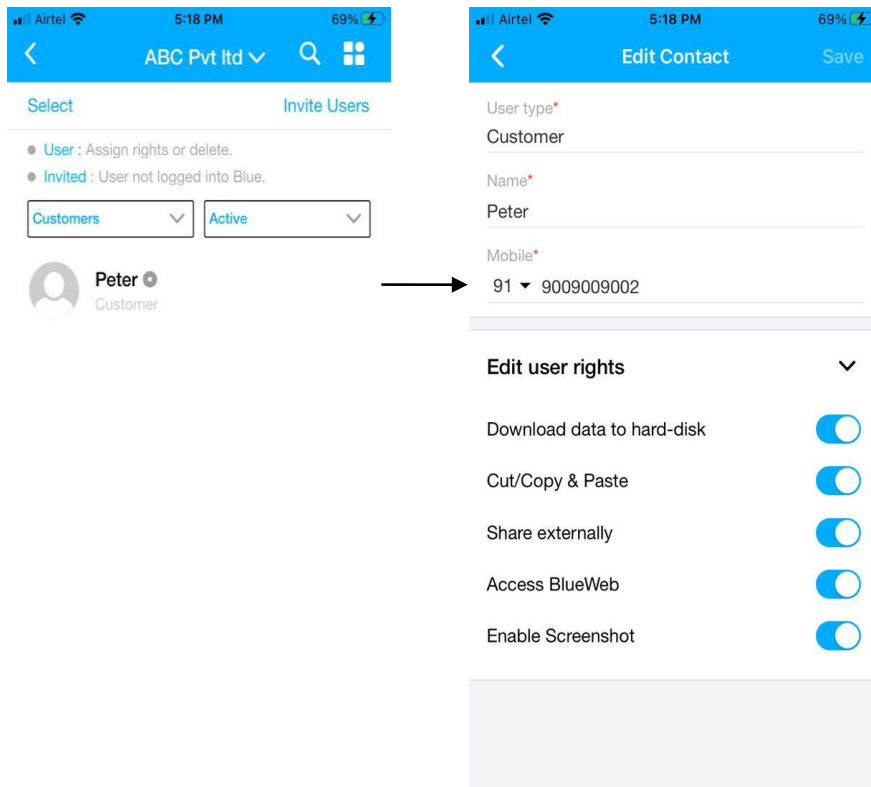
a. Add Customer, Supplier..: If the admin grants this right, the users (internal user and admins) can add external users (customers, suppliers, etc.). Upon disabling the right, prohibits the user from adding the external user.

b. Download data to hard-disk: If the admin grants this right, the users can download attachments that are saved in the phone's storage. Upon disabling this right, the users will not be able to download attachments to their device.

c. Cut/Copy & Paste: The users will be able to cut/copy/paste from BlueSecures to external apps such as WhatsApp, email etc or vice-versa if the rights are enabled. If not, then they will be unable to cut/copy/paste from BlueSecures/to BlueSecures.

d. Share Externally: The user will be able to share attachments such as Images, Videos, Documents, and Audios to external apps if the admin grants the right. If not, they will not be able to share any attachments to the external apps.

e. Access BlueWeb: Blue Web is a web-version application of BlueSecures for desktop messaging. The users will be able to access Blue Web if the right is enabled. If not, they will not be able to access it.

f. Enable Screenshot: The user can take screenshots and record their screen only when their rights are enabled. Disabling this right will prevent the user from taking screenshots and recording their screen.

g. Send via WhatsApp: Internal users can send messages from BlueSecures to users who haven't installed BlueSecures to WhatsApp only when this right is enabled.

h. Send Text: The internal users can send the message from BlueSecures to the users haven't installed BlueSecures to SMS/Text only when this right is enabled.

I. Broadcast list: The internal user can create Broadcast group only when this right is enabled. If not, then they will not be able to create broadcast group.

b) Delete user:

The admin, through admin controls, can delete users from their workspace, either individually or in bulk. Once a user is deleted, they lose access to the workspace, and active users won't be able to continue chatting with the deleted user, as the deleted user's chat in the Connect Inbox will be grayed out.
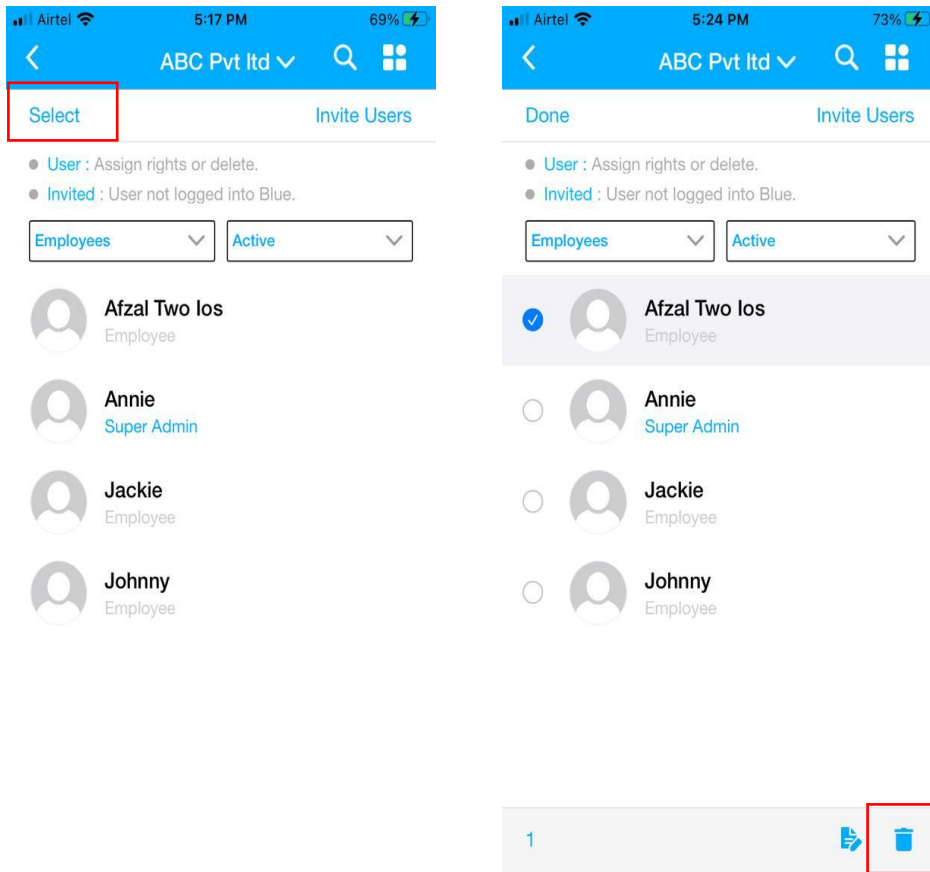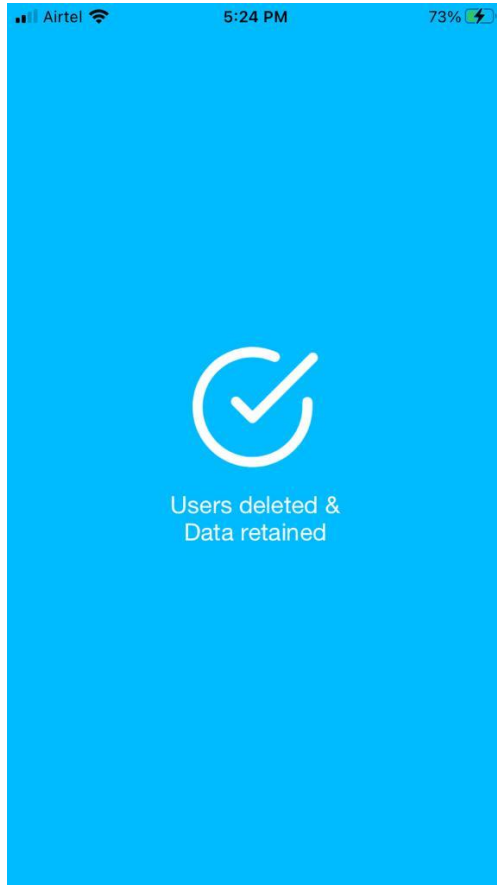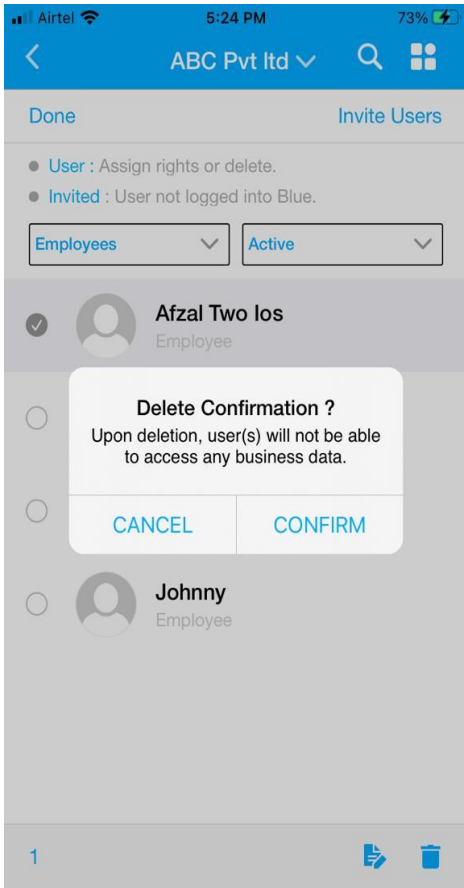
c. Assign Super Admin

Only Super admin can assign another super admin which can be an internal user/ or business admin in the workspace. The former super admin becomes an internal user once an assigned new super admin is assigned.
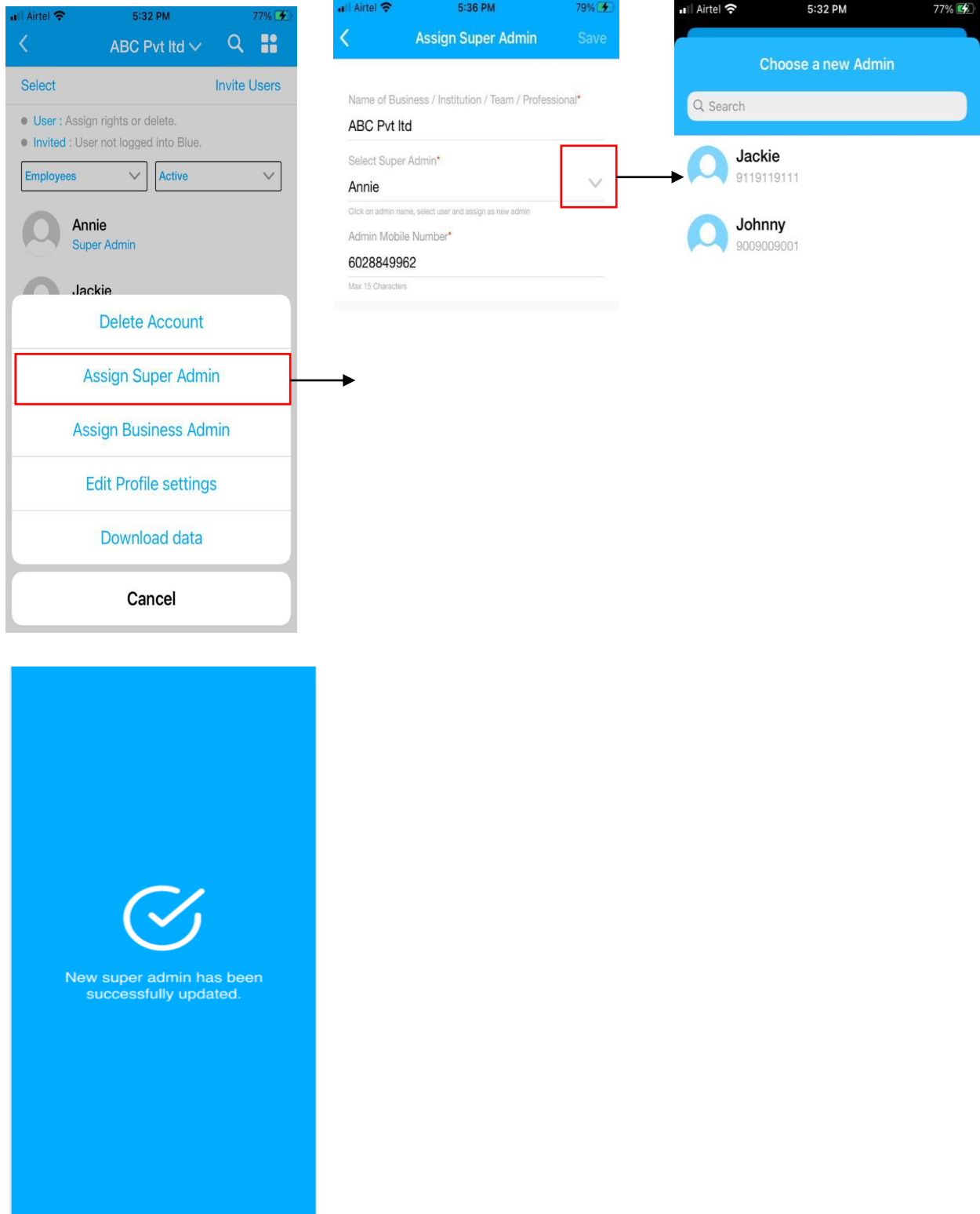
d. Assign/unassign Business Admin:

Only Super admin and Business admin can assign new Business admins in the workspace. The former Business admin becomes an internal user once a new Business admin is assigned, and only the Super admin can unassign a Business admin.

i)   Assign Business admin:

The super admin/business admin can select internal users as a business admin to a workspace and add the department details as shown below.
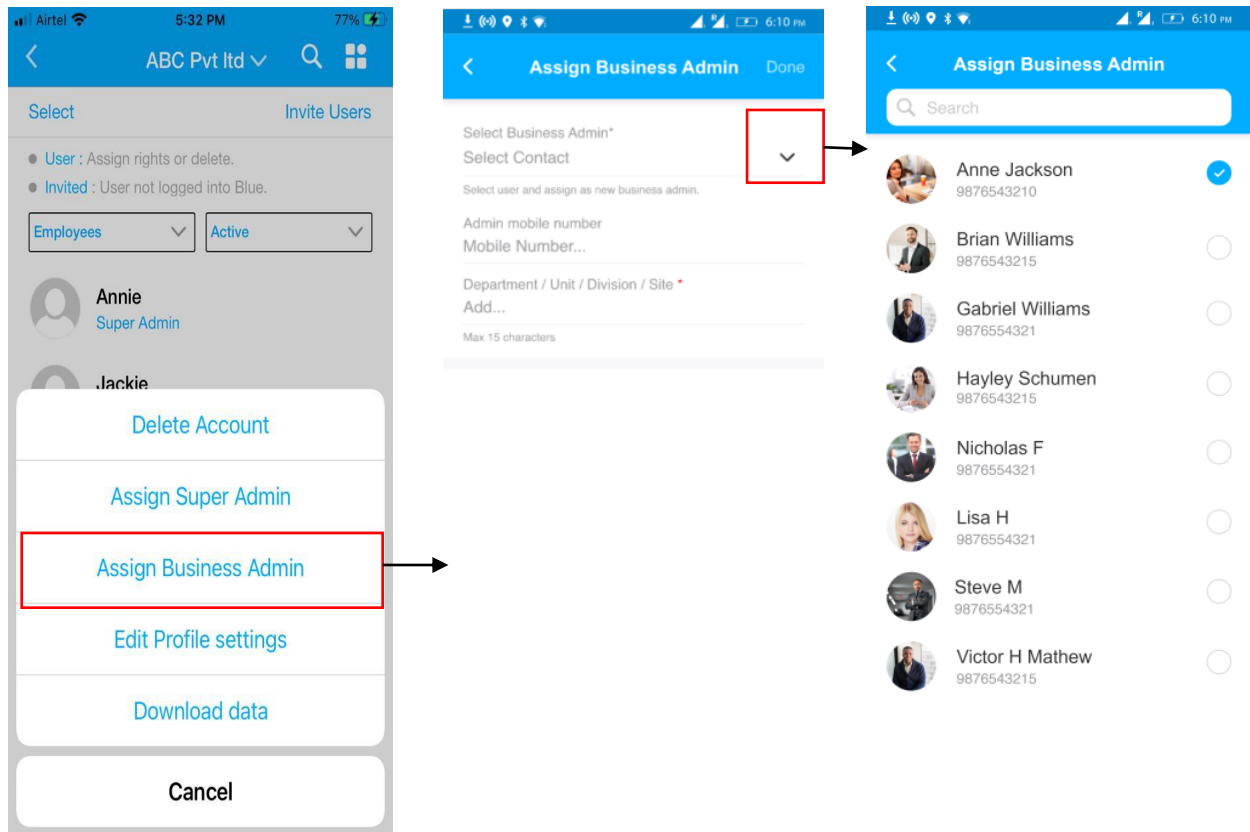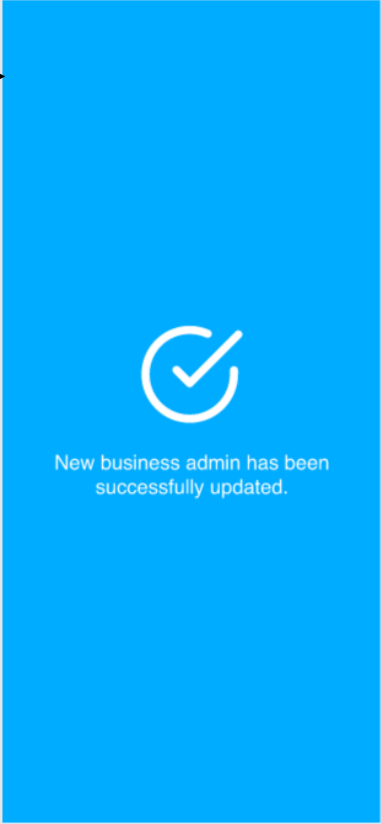
ii)   Unassign business admin:

The super admin can unassign the business admin in 'Assign Business Admin' page as shown below.
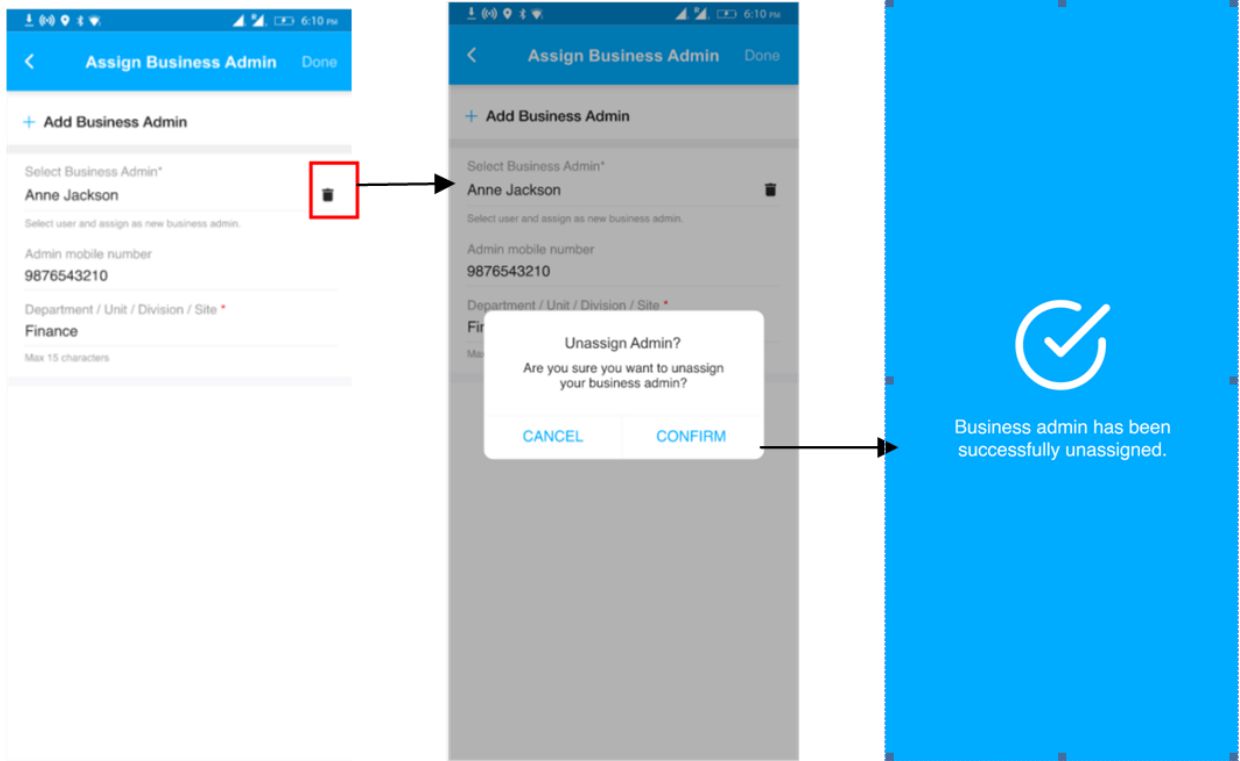
e. Download data:

In the admin controls, the admin can download business data and select specific users' or all the users' data. This is helpful for audits. The downloaded data will be stored on the device.
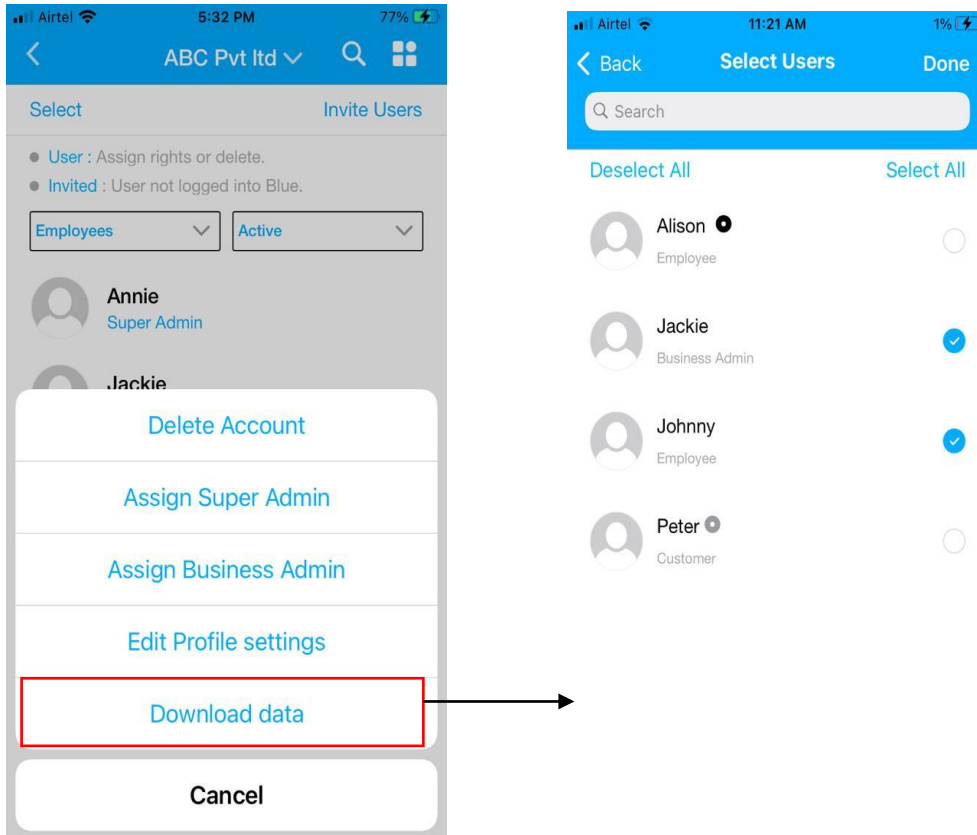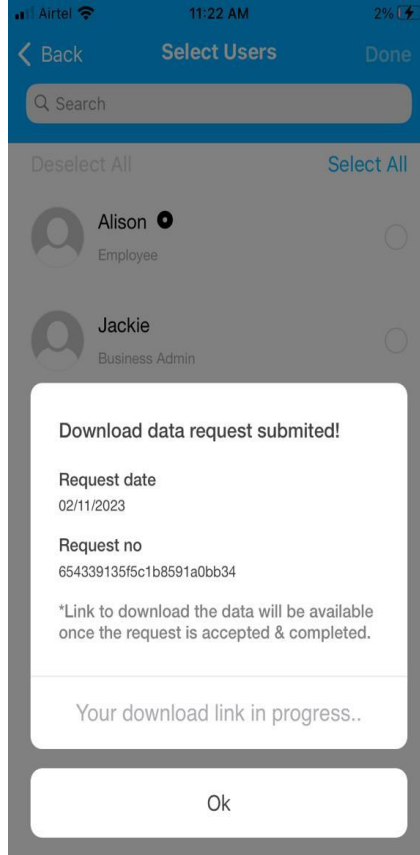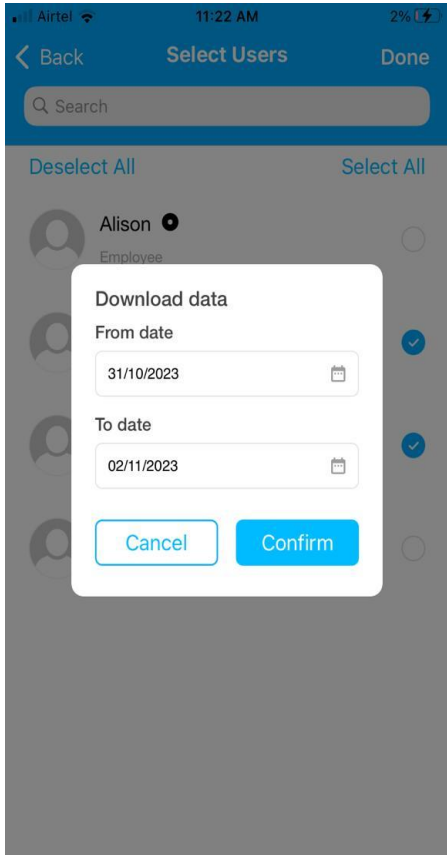
Messaging

The user can send or receive messages in BlueSecures:

1:1 messaging   Group   Broadcast   Helpdesk
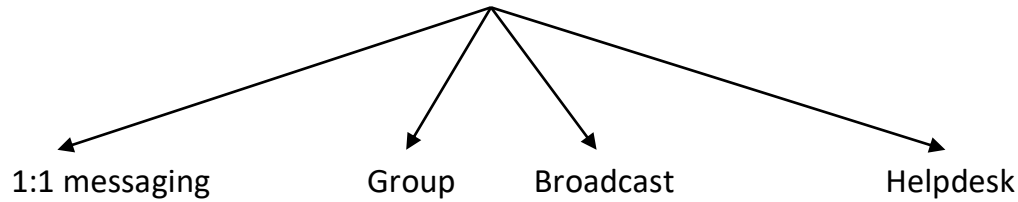
1:1 messaging:

- The user upon tapping on individual user in the connect inbox or in the contacts, will be taken to the 1:1 chat screen.

a. **For the Active users:**

- The header of the chat screen will display the name of the sender.
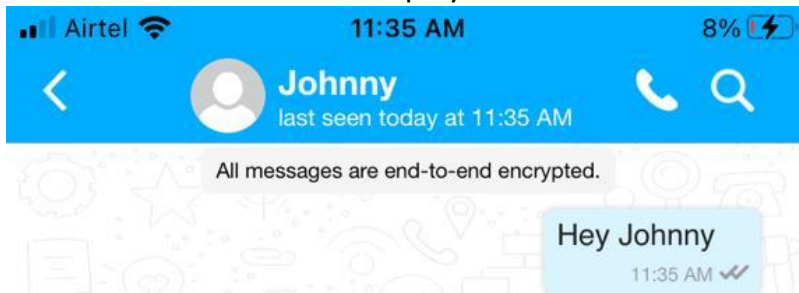
- . Upon tapping on the profile, the pull-up screen opens and the sender can see the details such as user name, workspace name, user type (e.g., employee/customer), and mobile number.
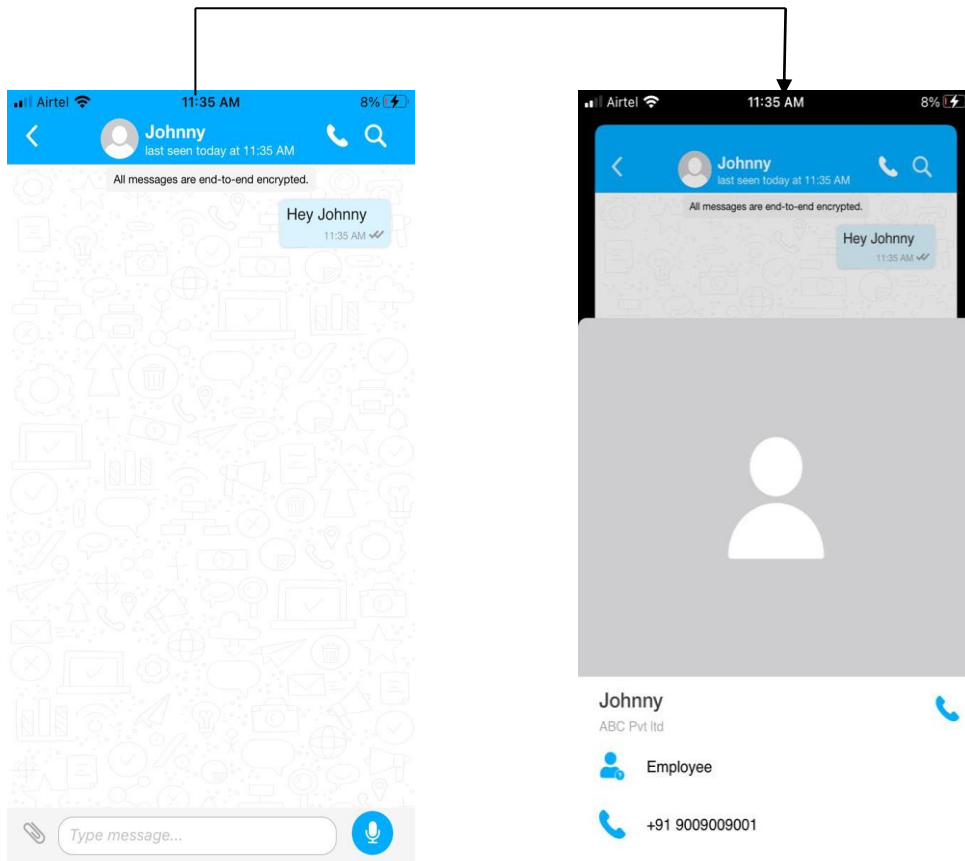
- When the user taps on the phone button, they will be taken to the phone dialer.
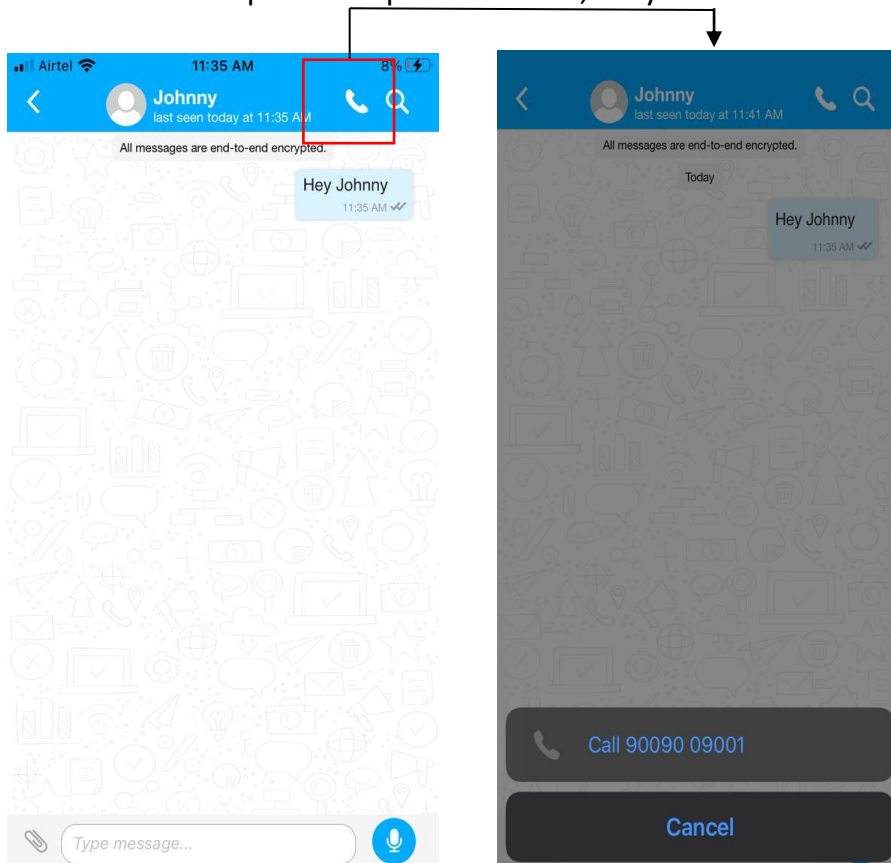
- When the user taps on the search, they can search the message within the chat screen.

- In the external user 1:1 chat screen, there is a 'More' button. When the user taps it, they can either search for messages within the chat screen or choose the option to start or stop the chat with external users. This feature helps to prevent unnecessary chats with external users.
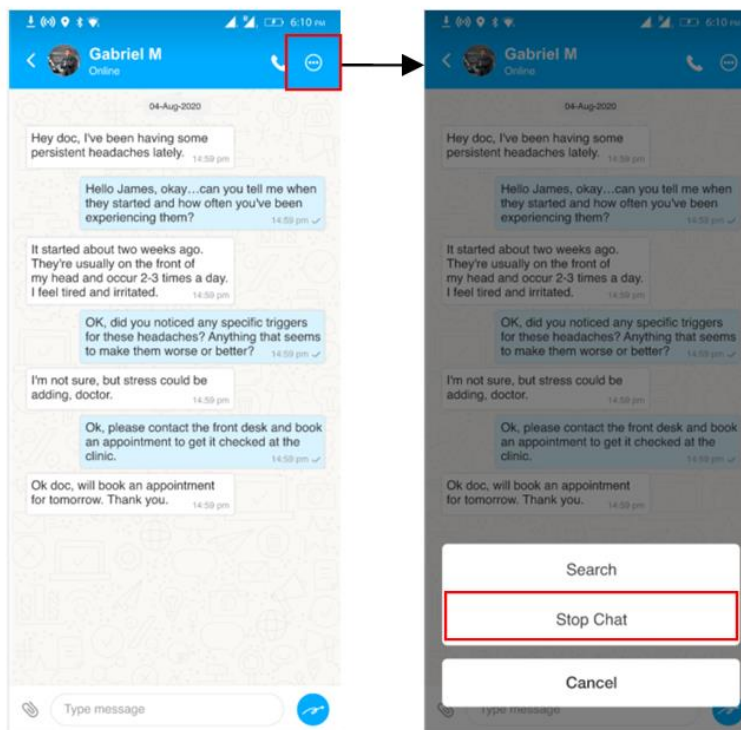
Once the user stops the chat, the text field will be hidden and the user cannot send or receive the message.
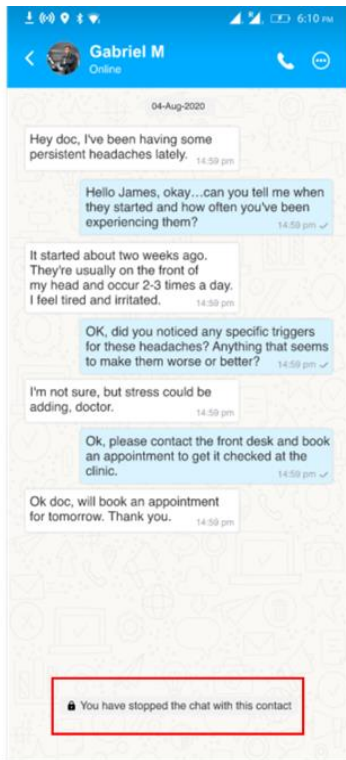
To resume the chat, the user has to tap the button on the 1:1 chat screen and click on 'Start Chat'.
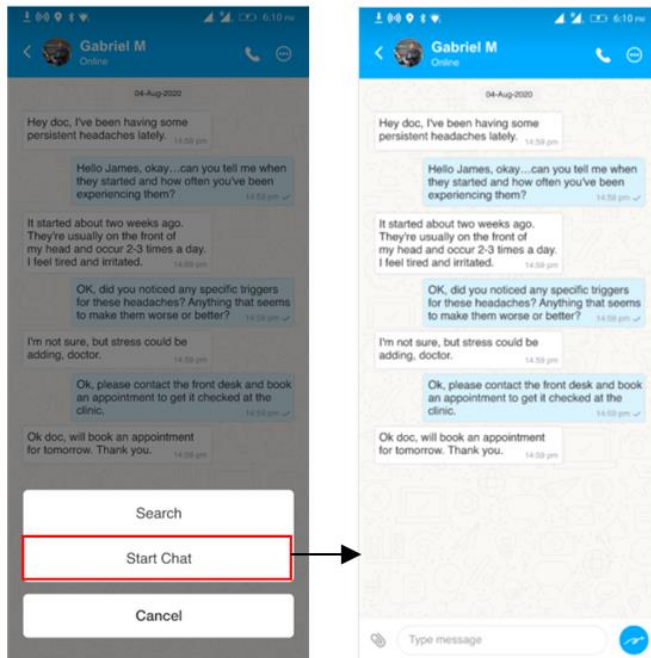
- The users, who are active on BlueSecures, will receive the message in BlueSecures when the sender sends message in BlueSecures.
- The sent message will appear in the right-hand side.
- The user can send text message and attachments, such as image, document, video, location, and contact or share them from the user files by clicking on the attachment button next to the text field.
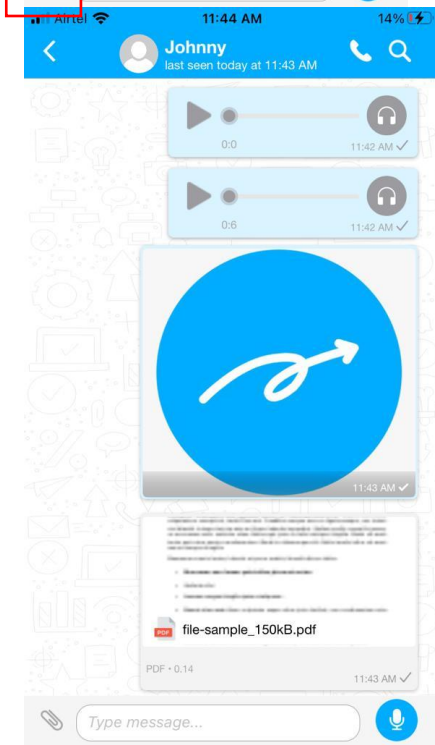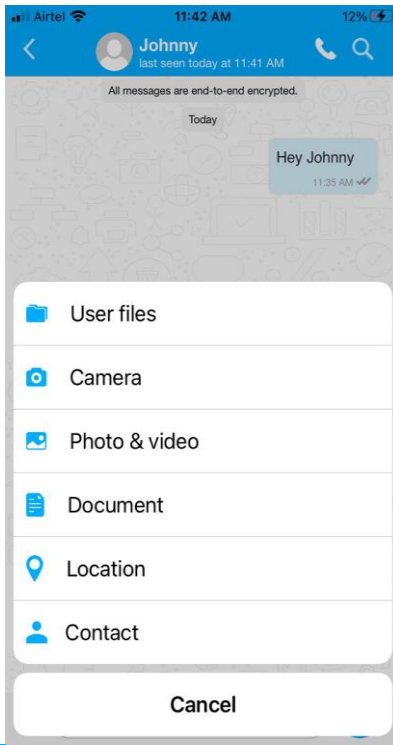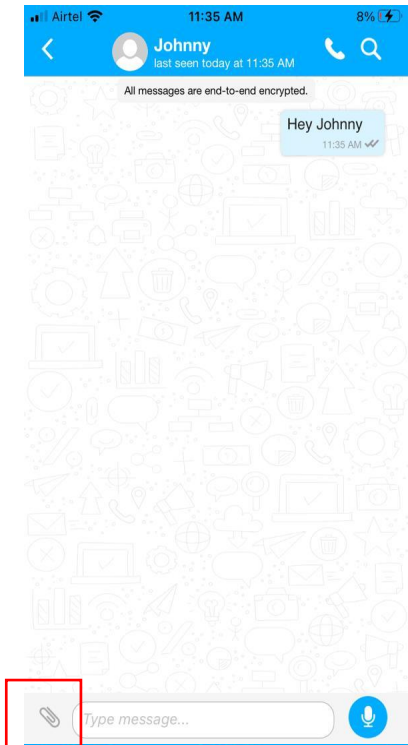
- Upon the long press on the audio button, the user can send the audio message.
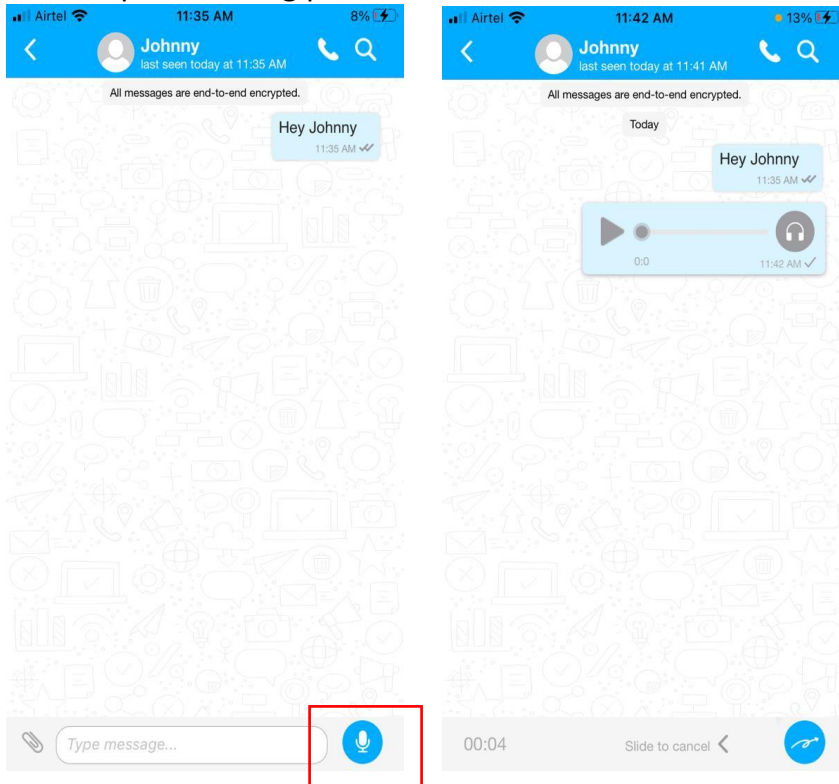
- Once the sender sends the message, a single grey tick indicates that the message has been sent but not yet delivered. Double grey ticks indicate that the message has been sent and delivered to the recipient but the recipient hasn't read the message. When the ticks turn blue, it indicates that the message is sent, delivered, and read by the end user.

- When the user receives a message, they can see the bubble count indicating the number of messages received in the Connect inbox along with the notifications. The snippet will update with the latest sent or received message. If the receiver opens the chat screen and replies, the message will appear on the right-hand side.
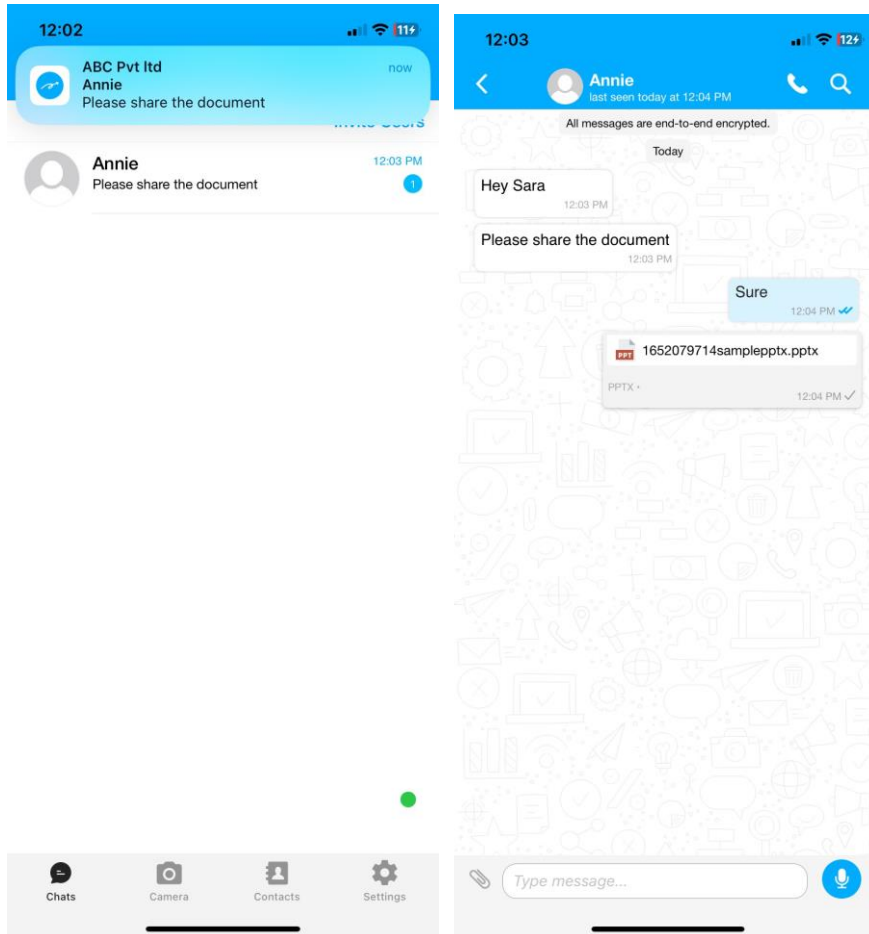
b. **For the Invited users:**

The sender can send the message to the user who haven't logged into the BlueSecures upon tapping on individual user in the connect inbox or in the contacts.
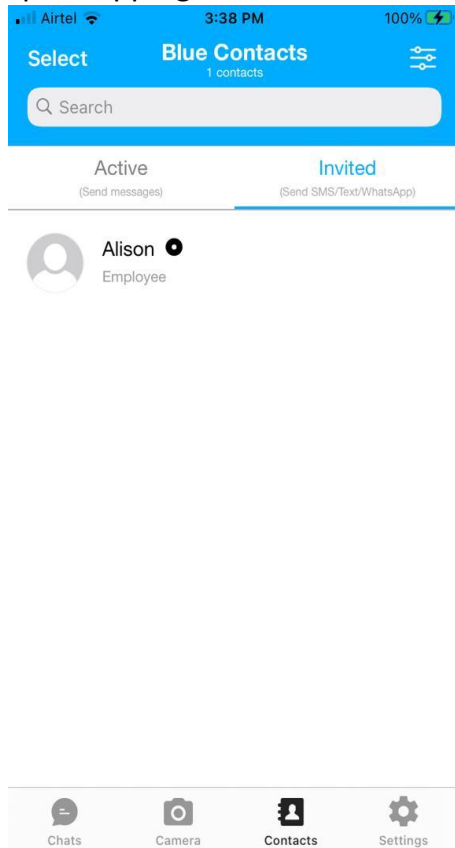
- The header of the chat screen will display the name of the sender. Upon tapping on the profile, the pull-up screen opens and the sender can see the details such as user name, workspace name, user type (e.g., employee/customer), and mobile number.
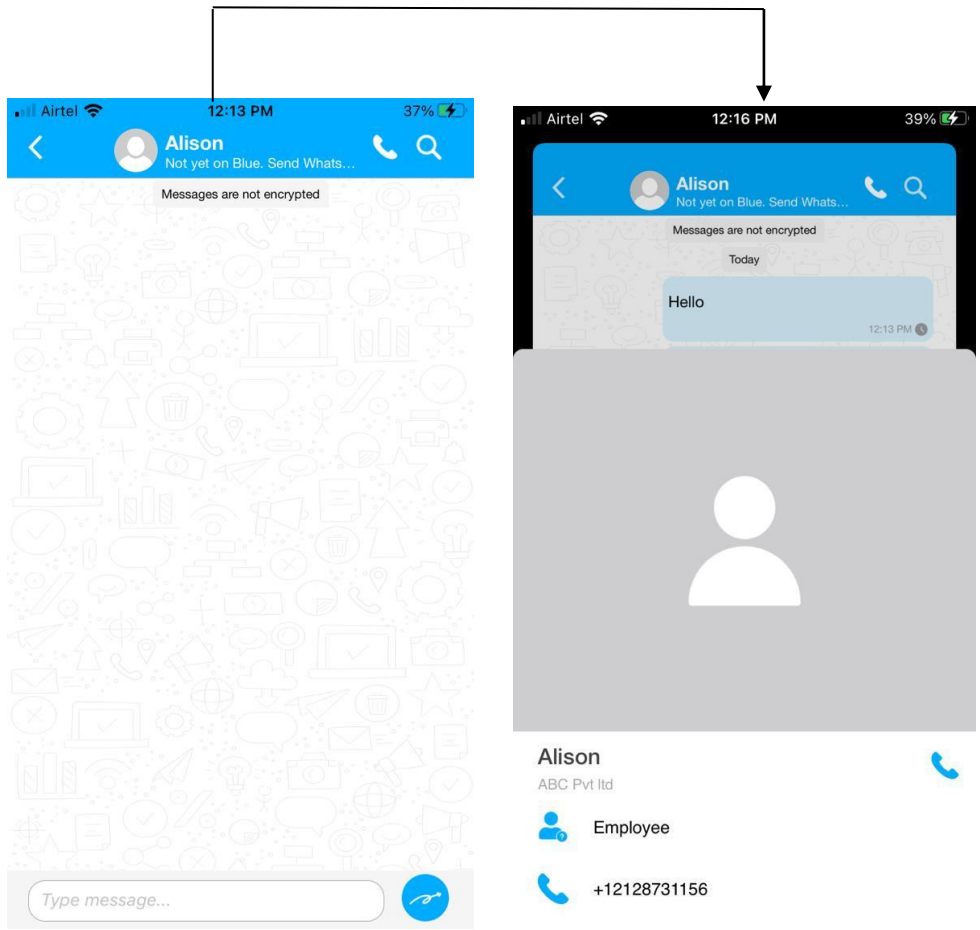
- When the user taps on the phone button, they will be taken to the phone dialer.
- When the user taps on the search button, they can search the message within the chat screen.

- The sender must choose the method of message delivery for the recipient: WhatsApp or Text, depending on the user's rights. If the sender selects WhatsApp, the message will be delivered through WhatsApp; if the sender chooses Text, the message will be received as an SMS.
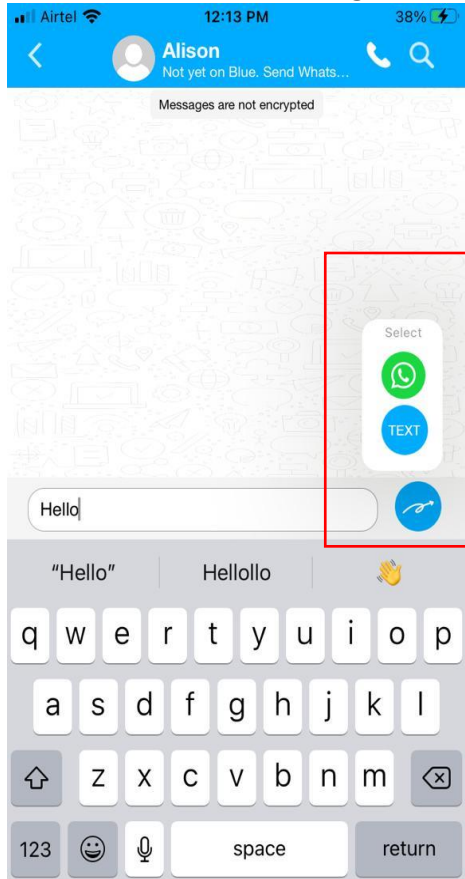
- When the user receives the message from WhatsApp/SMS, they can see the bubble count of number of messages received in the connect inbox, and the snippet will be updated with the latest message sent or received.

Group Messaging

a. **Creation of the group:**

The admins and internal users can create the group in BlueSecures Upon tapping the menu in connect inbox, the user gets an option 'Create Group' then can add participants and add group name to create the group.
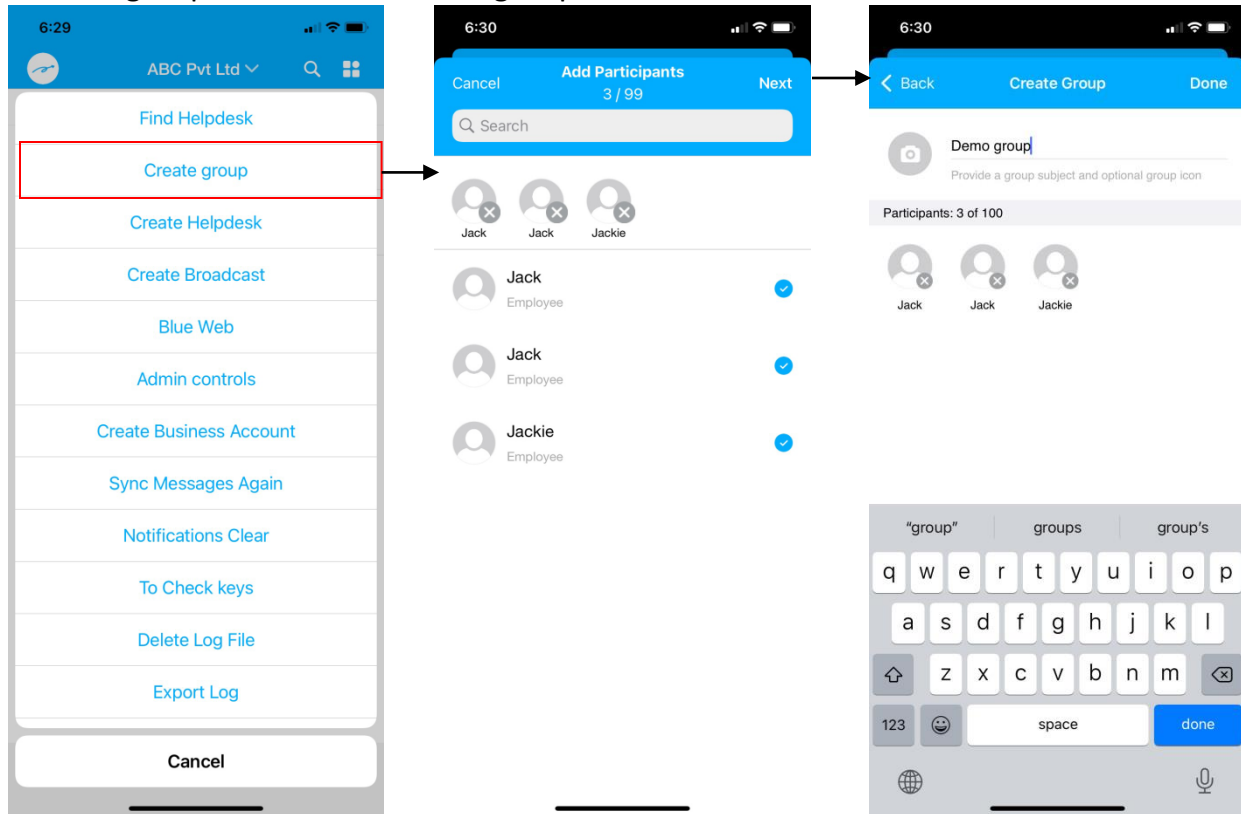
The newly created group appear at the top of the connect inbox and the participants get notified when they are added to the group.
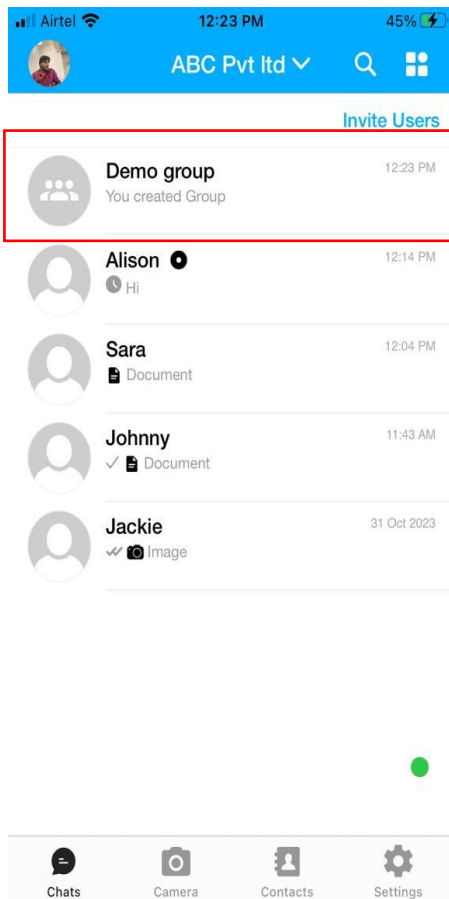
b. **Group info page:**

In the group info page, the group admin can add the participants as shown below.
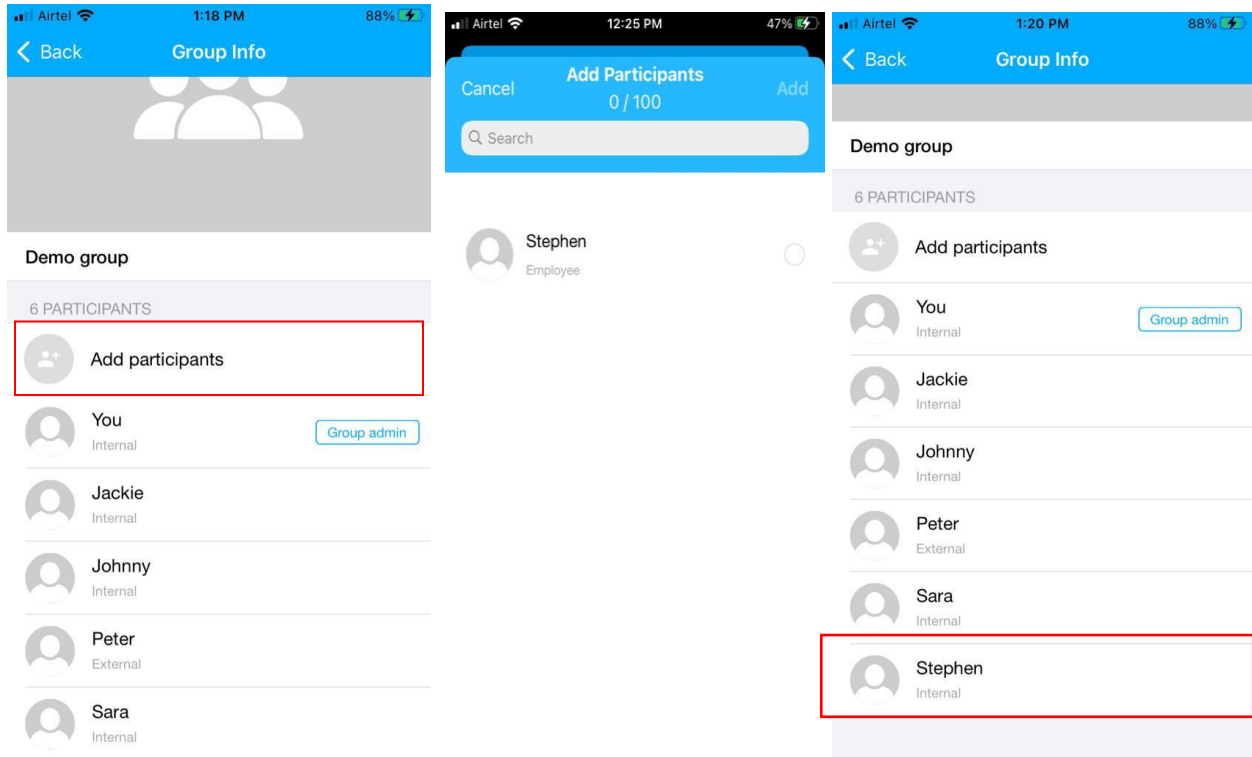
The group admin can remove participants or assign a group admin (internal users only) by long-pressing on the user's name.

c. Chat screen of the group

- The group name will appear in the header of the group.
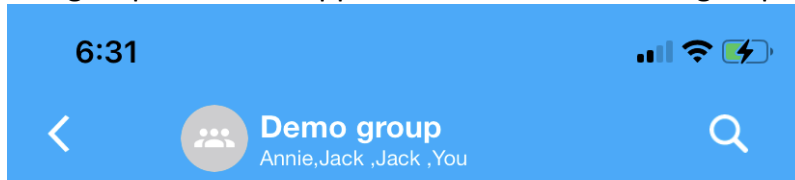
- The user can search messages using the search button in the top-right corner of the chat screen.
- When the admin creates a group, adds or removes participants, assigns a new admin, or removes participants, they can see a toast message indicating the action.

d. Messaging in the group

The receiver i.e., other group participants/group admin is notified about the message and also sees the message bubble count indicating the number of messages received in the connect inbox.
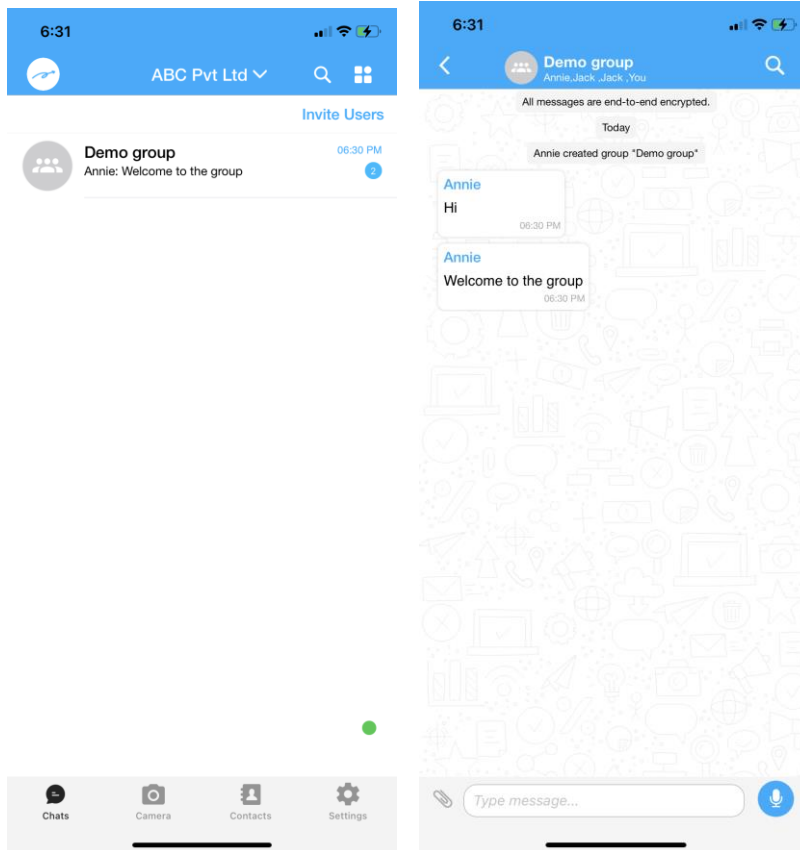
The sender can send text, audio messages, various attachments (including images, videos, documents, locations, and contacts), and also send from user files within the group. When the sender sends the message, it will appear on the right-hand side of the chat screen for them. When they open the chat screen, the received messages appear on the left-hand side.
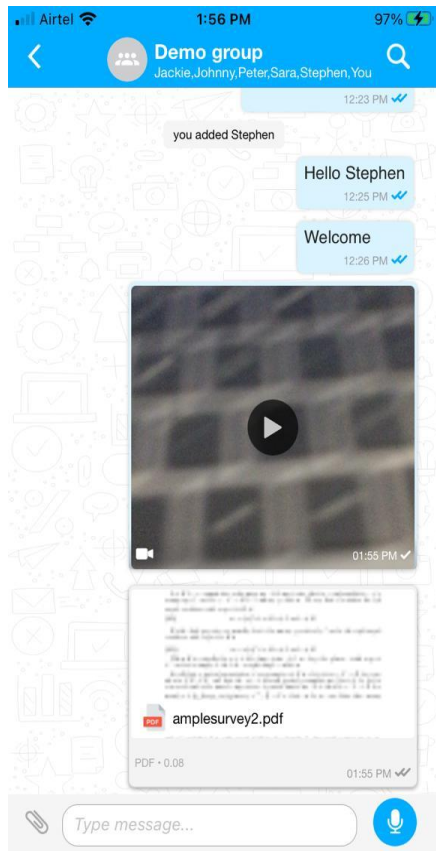
Broadcast Messaging

e. Creation of the broadcast group:

Admins and internal users, once they have the necessary user rights, can create a broadcast group in BlueSecures by tapping the 'Create Broadcast' option in the Connect Inbox menu. They can then add participants and assign a name to the broadcast group.
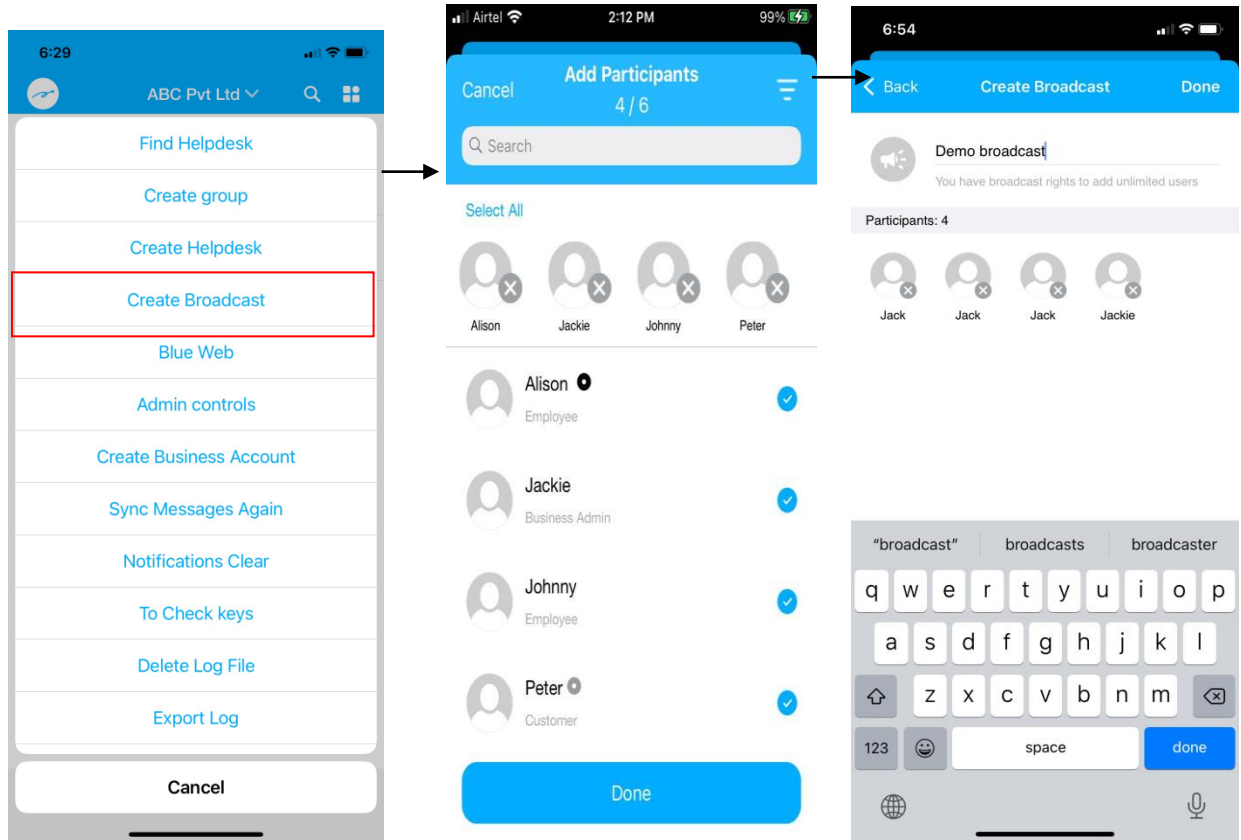
The newly created broadcast group appears at the top of the connect inbox.
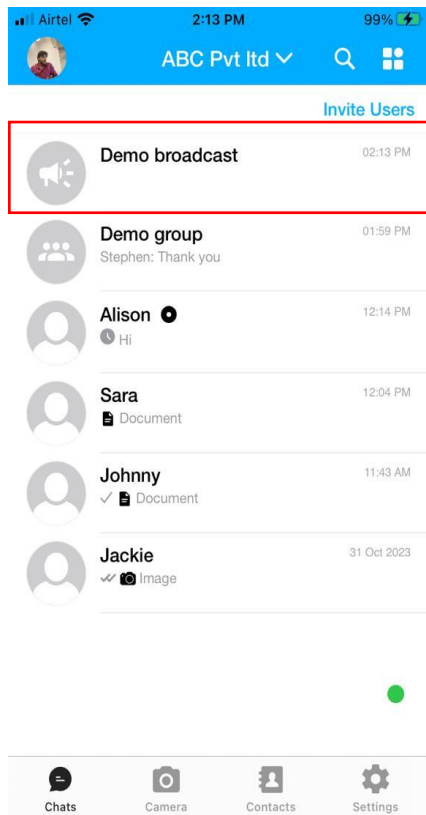
f. <u>Broadcast group info page:</u>

In the broadcast group info page, the group admin can add participants as shown below.
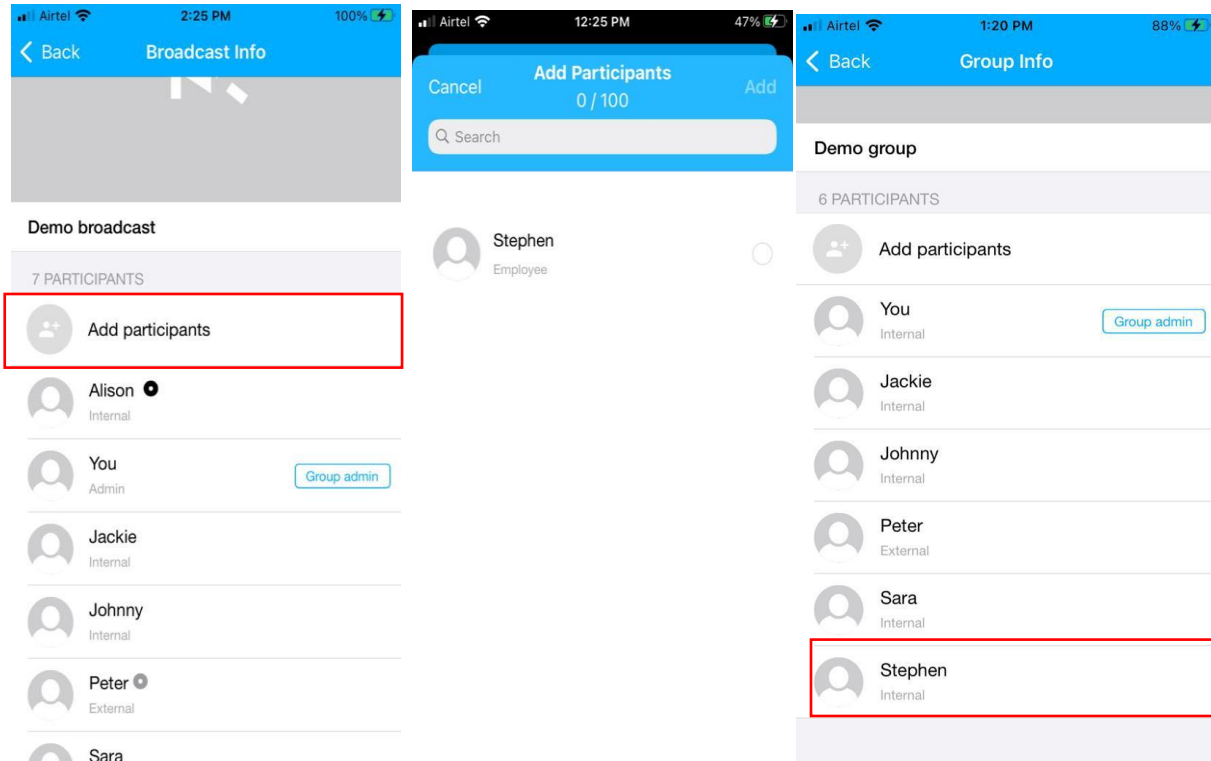
The group admin can remove the participants upon long-press on the participant's name.
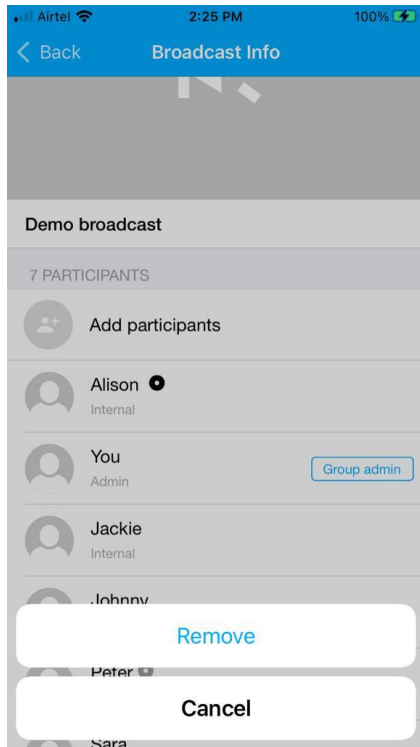
g. Chat screen of the broadcast group

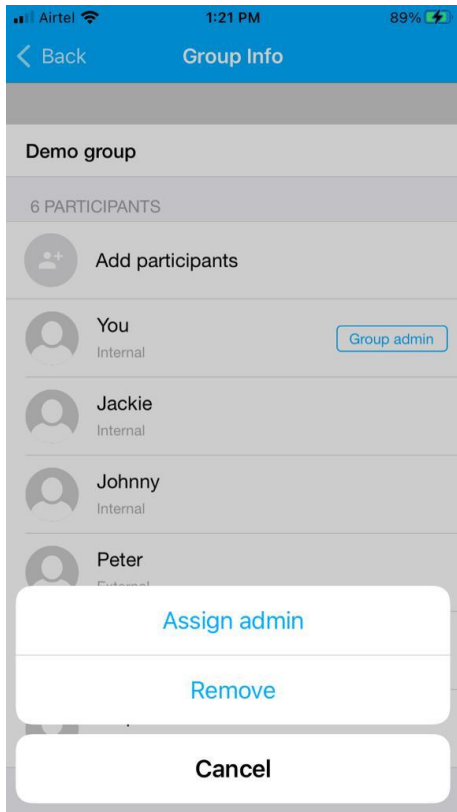- The group name will appear in the header of the group. The user can search messages using the search button in the top-right corner of the chat screen.
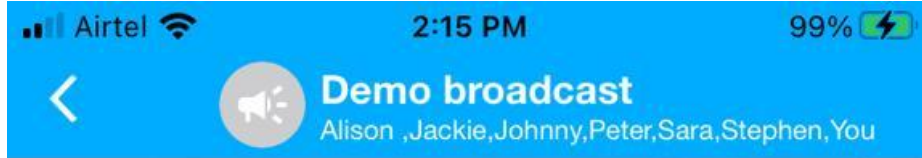
- When the admin creates a group, adds or removes participants, assigns a new admin, or removes participants, they can see a toast message indicating the action.
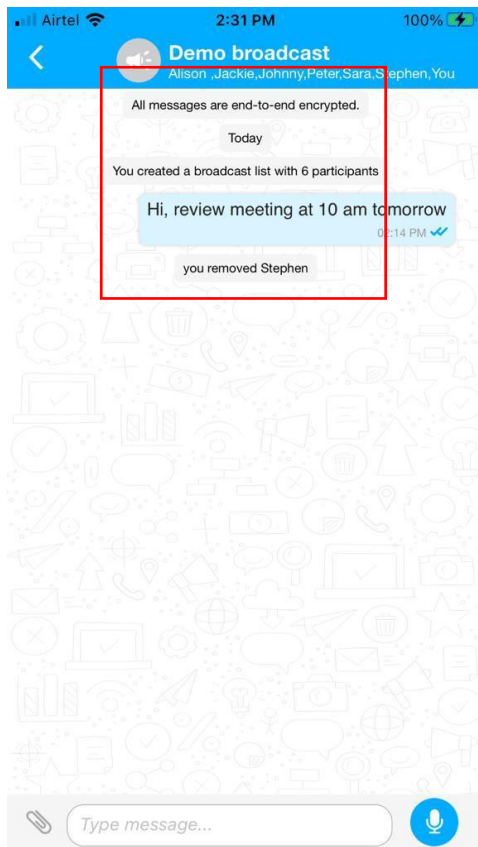
h. Messaging in the broadcast group

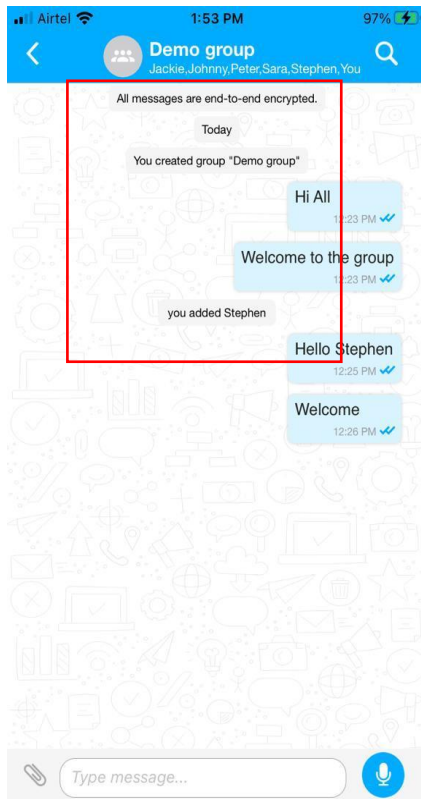- When the sender sends a message, the receiver is notified and receives it as a 1:1 message. The receiver also sees the message count bubble, indicating the number of messages received in the Connect Inbox. When they open the chat screen, the received messages appear on the left-hand side.
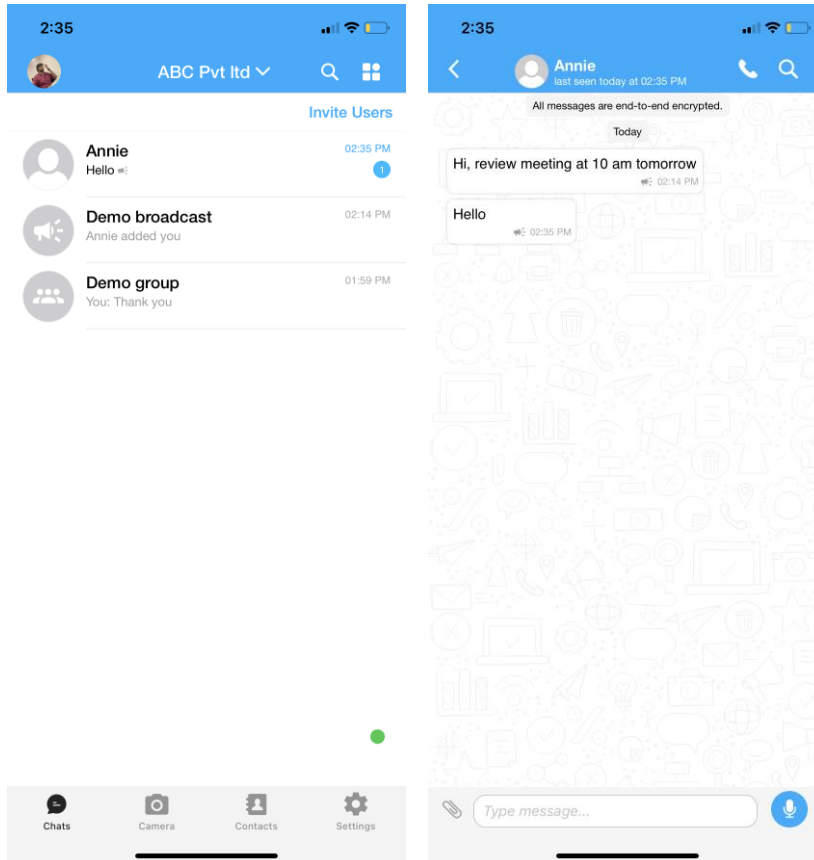
- The sender can send text, audio messages, various attachments (including images, videos, documents, locations, and contacts), and also send from user files within the group.
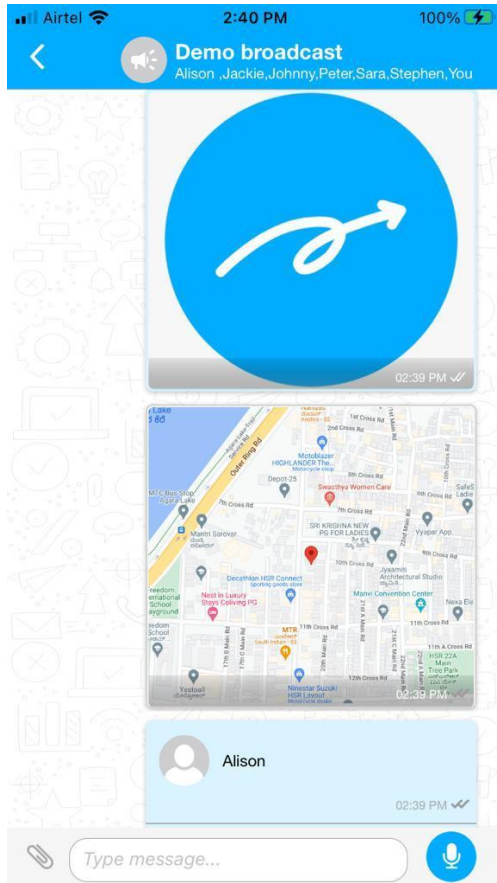
Messaging in the Helpdesk

a. **Creation of Helpdesk**

Screen labels: **1**   **2**   **3**
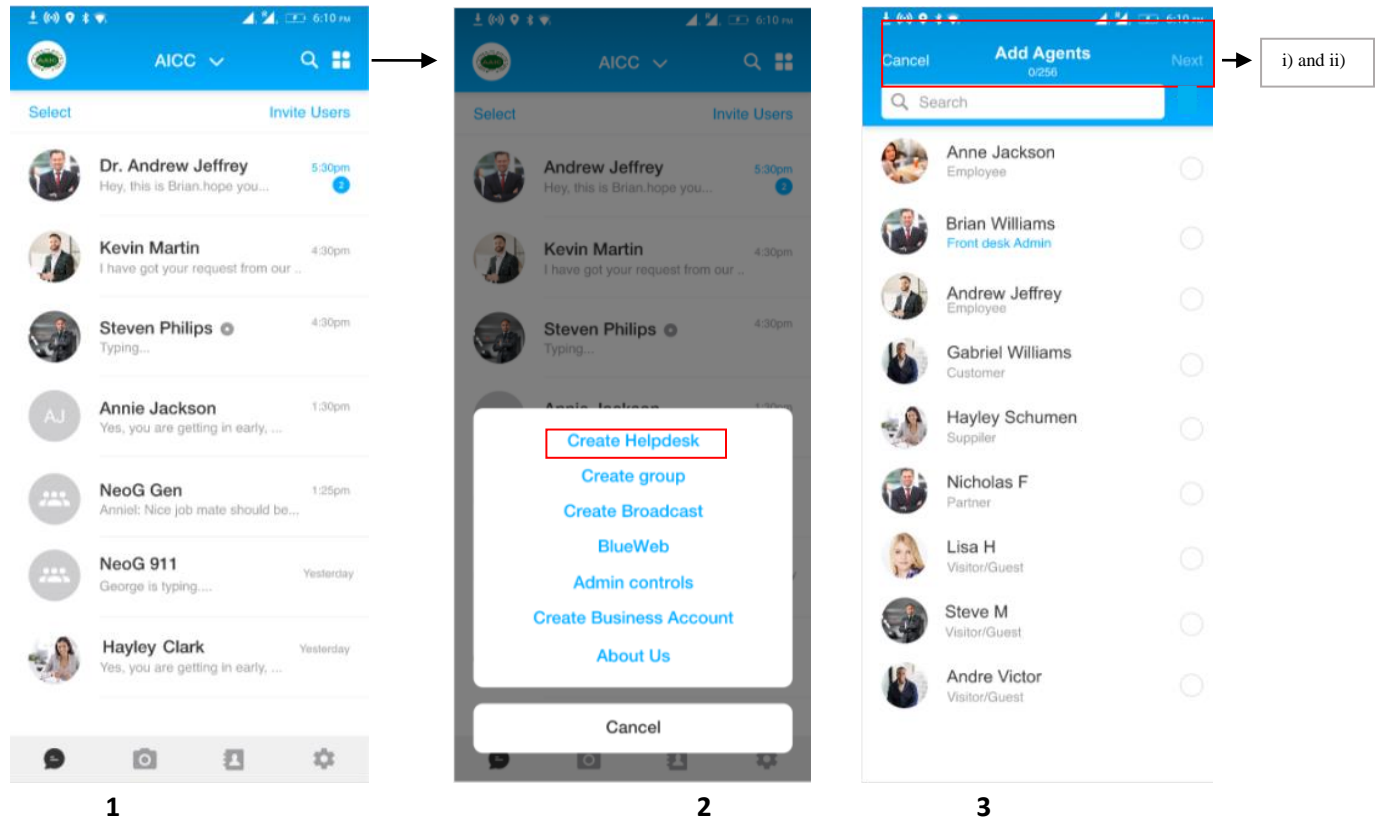
Screen 1: Admin taps on the menu item in the connect inbox.

**Screen 2:** 'Create Helpdesk' option is added to the menu item which is visible for the admins (Super admin and business admin).

Screen 3: The user will be taken to a new screen
i) The header should be displayed be as 'Add Agents'. The list of active internal user across all the location should be displayed. Upon tapping on the Cancel button, the user should be taken to the connect inbox. The list should be scrollable.
ii) The user can search agents by name in the search field.
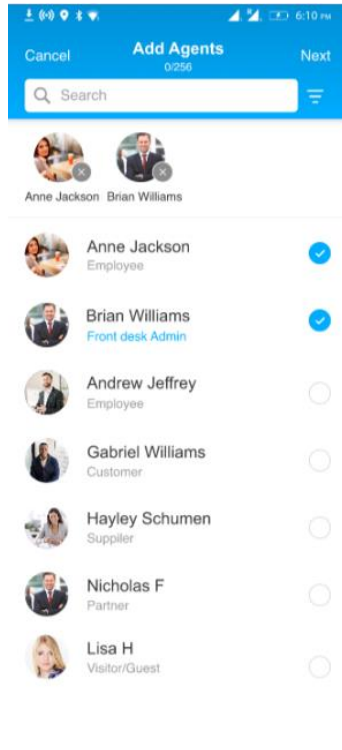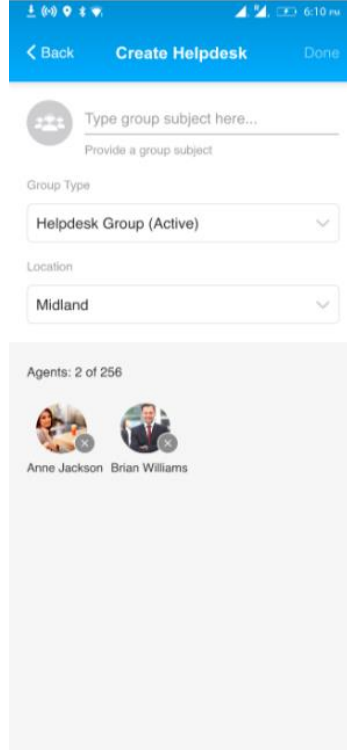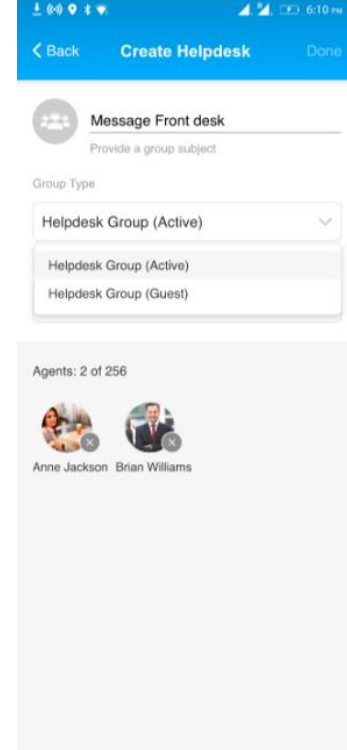
| 4 | 5 | 6 |

Screen 4:

i) The user can select single or multiple agents. The radio button turns blue upon selection, and the 'Next' button should be enabled for clicking. The selected agents should also appear at the top of the list below the search field.

ii) When the user taps on the 'Next button', should be taken to the screen 5 as shown below.

Screen 5:

i) The user has to input helpdesk name.

ii) The default helpdesk group is 'Helpdesk Active' should be visible.

iii) The location will be the default location of the admin who is creating the helpdesk group.

Screen 6: The user can choose between 'Active' and 'Guest' by selecting from the 'Group Type' dropdown.

| 7 | 8 | 9 |
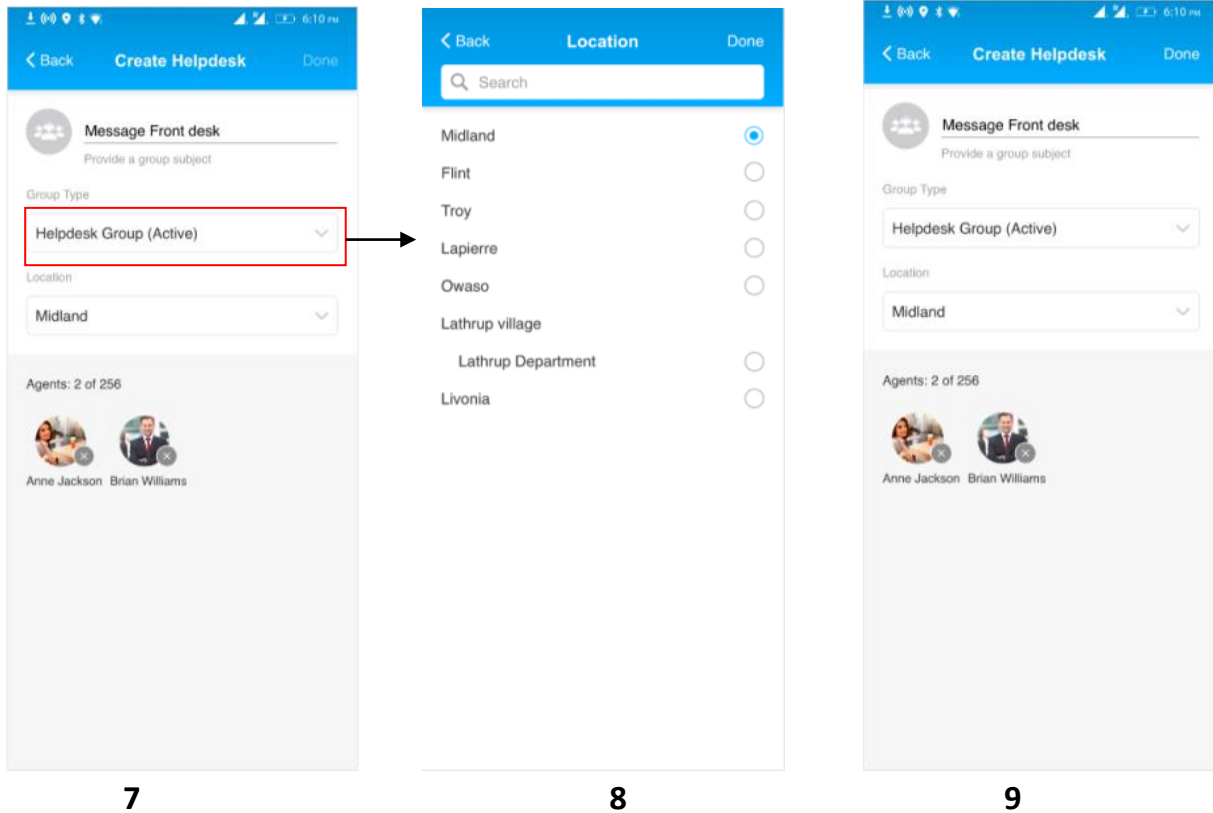
Screen 7: When the user taps on the dropdown in the location field, should see screen 8.

Screen 8:
The location screen opens as a pull-up screen, displaying the user's default location. The user can search by location and department name. The user can select only one location at a time. For locations with departments, the user can select the department. Upon selection, the radio button turns blue. After selecting the location, the user must pull down the screen, and the selected location will be updated.
If the user taps on 'Back', will be taken to thscreen 7, and if the user taps on 'Done' the selected location should be updated.

Screen 9: The selected location details should be updated and the user when taps on the Next button, should be taken to screen 10.

10	**11**	**12**
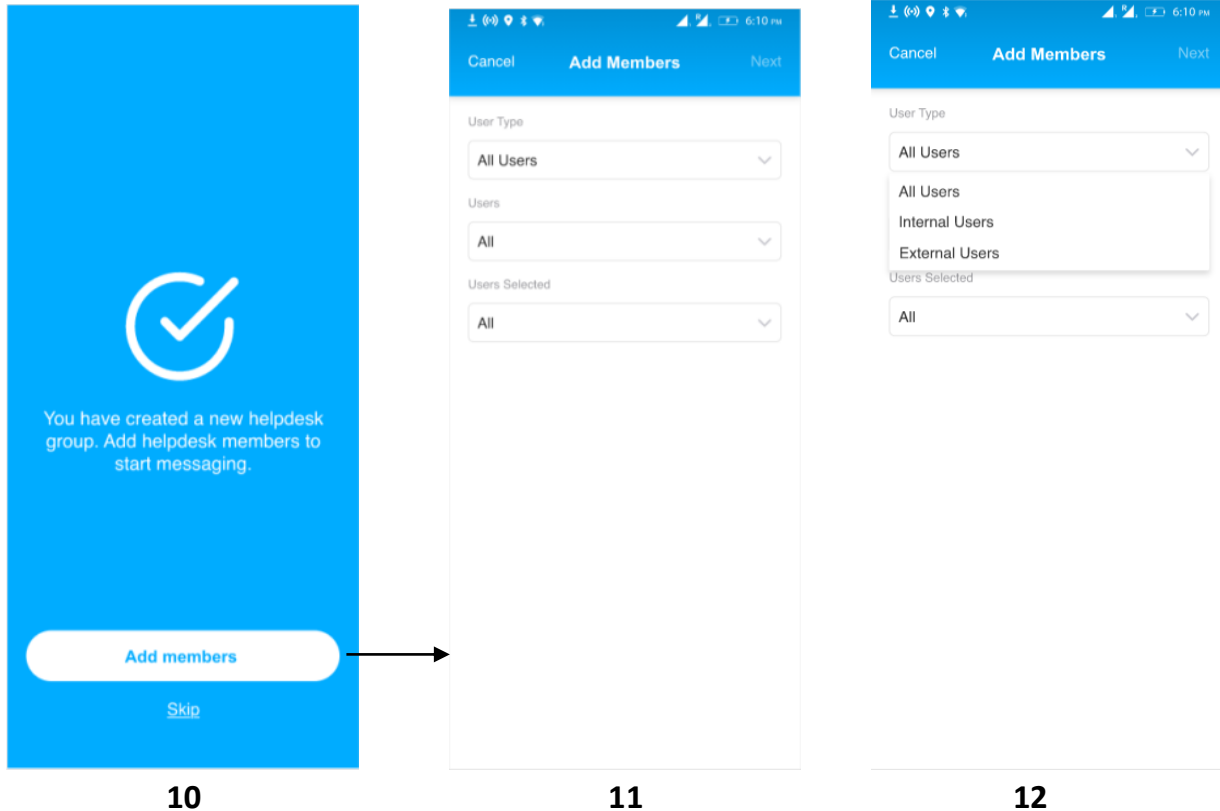
Screen 10: The user sees the success screen message "You have created a new helpdesk group. Add helpdesk members to start messaging.

When the user taps on 'Add members', should be taken to screen 11 and if the user taps on 'Skip' should be taken to the connect inbox with the created helpdesk should appear on the top of the chats.

Screen 11: When the user selects 'Add member' in the screen 10, a screen should display to add the members.

i) The header should be displayed be as 'Add Members, upon tapping on the back button, the user should be taken to the connect inbox.

ii) By default in the field 'User type, users, and users selected' should be All.

iii) When the user taps on the 'Next button', all the members should be added and should be taken to the connect inbox.

Screen 12: If the user taps on 'User type' field dropdown, three options should be displayed such as All users, Internal and External. If the user chooses All Users, all the users including external and internal active users of the selected location/department

should be selected. When the user chooses Internal or external users, please refer to the below screens.
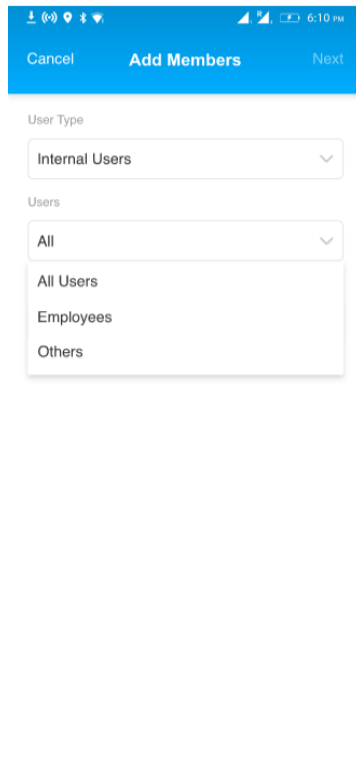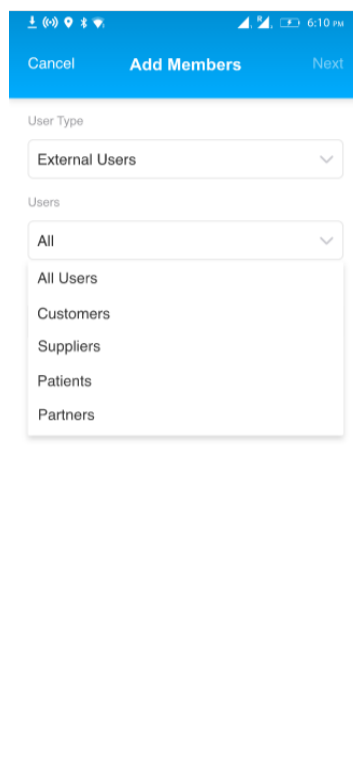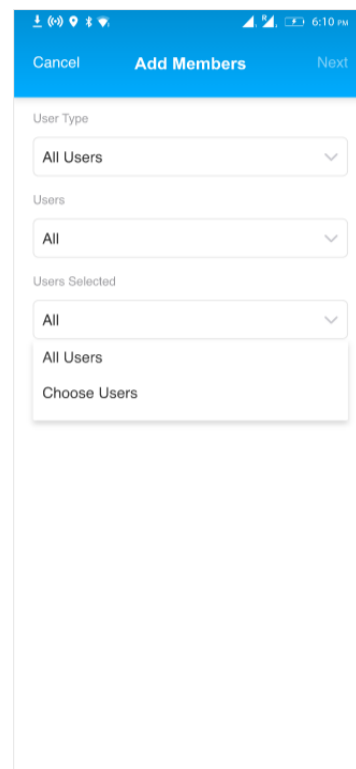
| 11 | 12 | 13 |

Screen 11: If the user taps on 'Internal users' in User type dropdown, and taps 'User' field dropdown, three options should be displayed such as All users, Employees, Others.
i) All users: All the active internal users of the selected location/department should be selected.
ii) Employees: All the active employees of the selected location/department should be selected.
iii) Other: Other active Internal user of the selected location/department should be selected.
When the user taps on next button, the members should be added and should be taken to the connect inbox.

Screen 12: If the user taps on 'External users' in User type dropdown, and taps 'User' field dropdown, the options will be displayed such as All users, Customers, suppliers, patients, partners and Others.
i) All users: All the external active users of the selected location/department should be selected.

ii) Customers/Suppliers/Patients/Partners/others: All the active Customers/Suppliers/Patients/Partners of the selected location/department should be selected.

iii) Others: All the other active external user types of the selected location/department should be selected.

When the user taps on next button, the members should be added and should be taken to the connect inbox.

Screen 13: If the user selects user type as Internal/External/All, in 'Users' field and in the 'User selected' dropdown, they can choose the users to whom they want of the selected location/department to add as a members or select 'All users' options to add all the members.
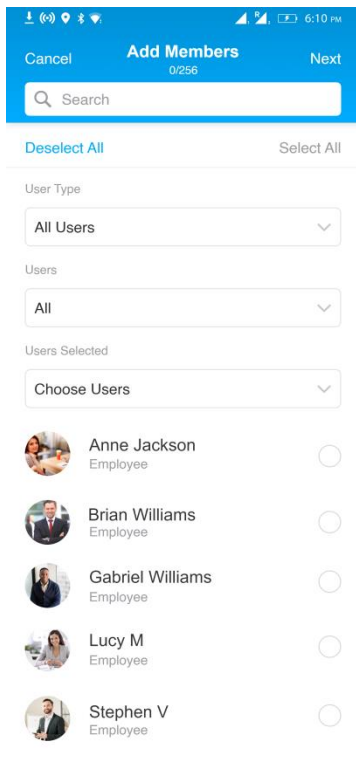
14
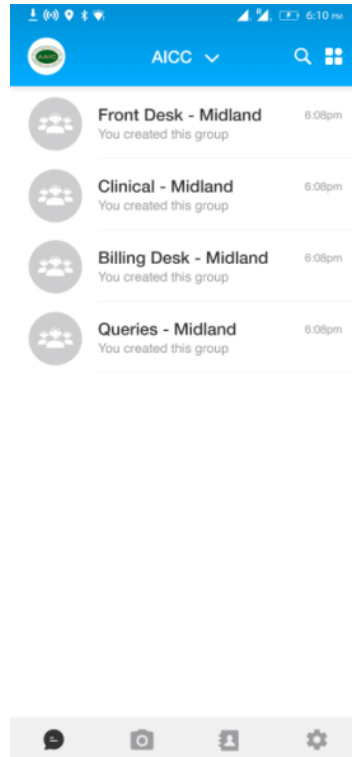
15

Screen 14: If the user selects 'All' from the above screen (screen 13) in 'Users Selected field', all the users should be selected. If the user selects 'Choose users' from the dropdown of screen 13, a list of users should be should based on the user already chosen filter.

E.g.,

a. If the user chooses 'All users' in the user type field and 'All' in User field, should see the list of all the active users in the 'User Selected' field of the selected location/department.

b. If the user chooses 'Internal' in the user type field and 'Employees' in User field, should see the list of all the active employees in the 'User Selected' field of the selected location/department.

c. If the user chooses 'External' in the user type field and 'Patients' in User field, should see the list of all the active patients in the 'User Selected' field of the selected location/department.

Note: The same logic applies to other filter types.

The users can search members in the search field. They can manually select the members or tap on 'Select all' button to select the members. Radio button will turn blue tick upon selection. When the user taps on 'Deselect All', the selected members should be deselected. The count of users selected should be displayed (below 'Add member' header).

Screen 15: Once the user taps on the next button, the members should be selected and should be taken to the connect inbox and should see the newly created Helpdesk on the top of the chats.

Format of helpdesk displayed on the chat screen: <Helpdesk group name> - <Location>

b. Helpdesk group info page
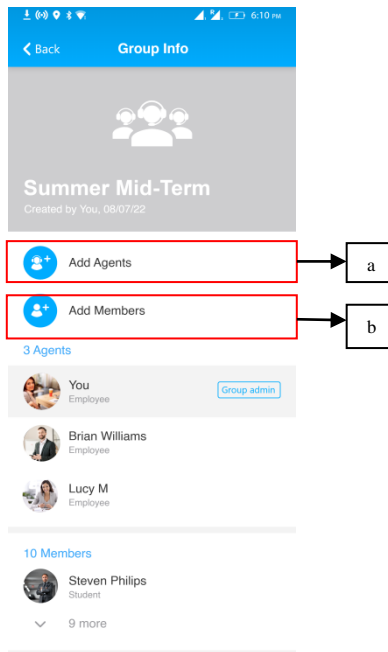
In the helpdesk info page, the helpdesk group name and location should be displayed. The group creation date should be displayed below the group name.

i) The option to add agents should be visible. When the user taps on 'Add Agents', should be taken to screen. Refer to screen 3 for the remaining steps.

ii) The option to add members should be visible. When the user taps on 'Add Members', should be taken to screen. Refer to screen 11 for the remaining steps.

All the Agent and members who are a part of the helpdesk group should be visible below the 'Add Members' field. The list should be expandable, and the count of agents and members and group admin details should also be displayed.

c. <u>**Messaging in Helpdesk group**</u>

When the helpdesk member initiates the conversation

When the helpdesk member (Daniel) gets added to the group, gets notified and sees the Helpdesk group name in the connect inbox.
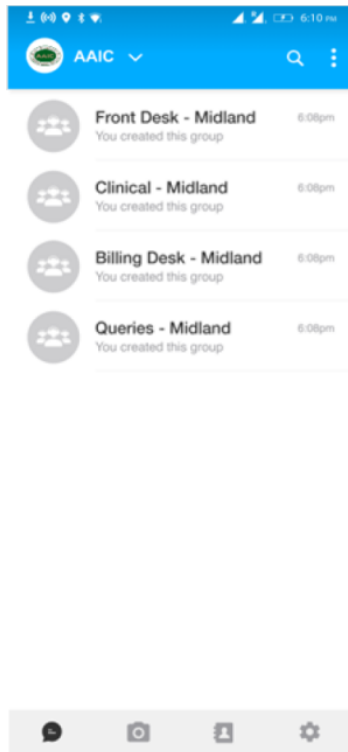
After tapping on the group in connect inbox, the member (Daniel) initiates the conversation as shown below.

Agent 1 Lucy views and replies to the message
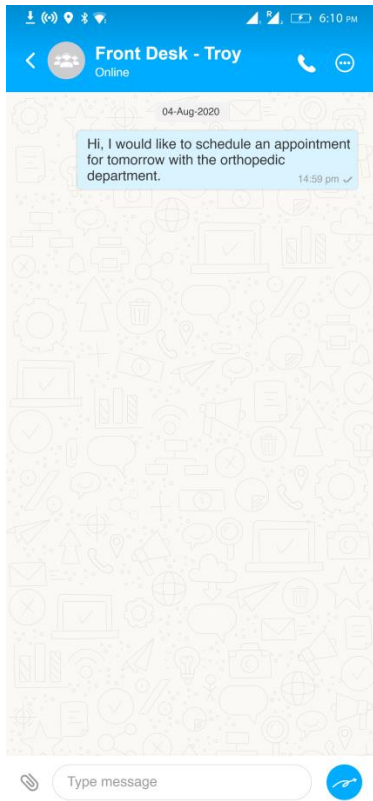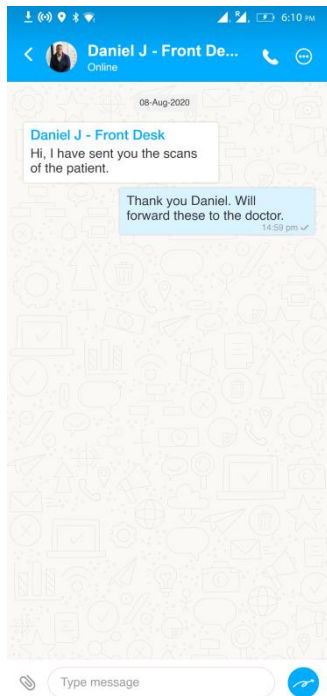
The agent 1 Lucy sees the member chat as 1:1 chat in the connect inbox. Format <Member name> - <Helpdesk Group name>. When the agent 1 Lucy opens the chat screen, should be able to reply in the helpdesk.

Agent 2 views the message
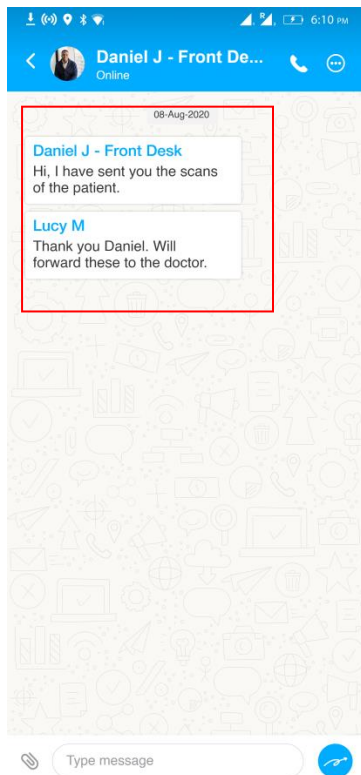
When the members and agent (1) messages, the agent 2 receives as a 1:1 message. When the agent 2 opens the chat screen, the chats of agent 1, members should see the chats on the left side.

Group info page:
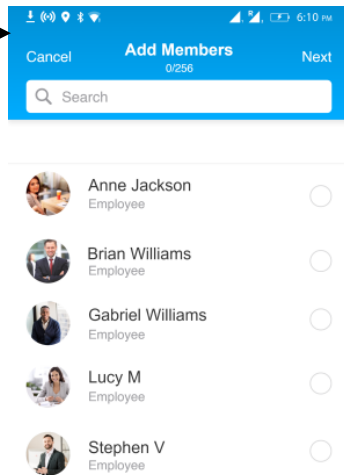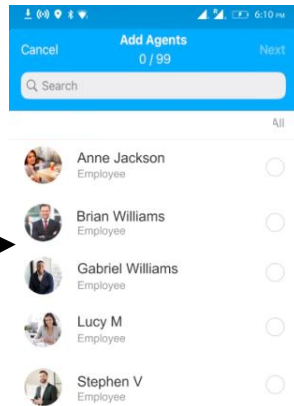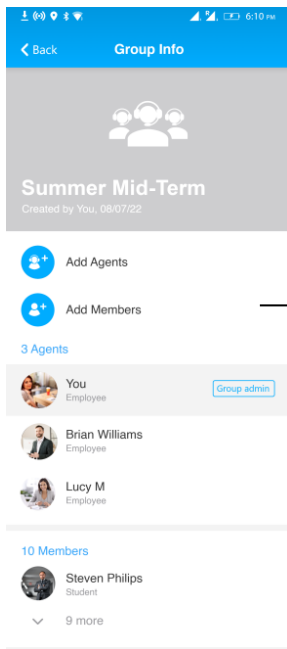
- In the group info page, all the added agents and members details should be displayed. The list should be expandable.
- When the user taps on 'Add Agents' option, pull up screen opens for the user to add agents. The header is 'Add Agents' below which the total number of agents (excluding the already added agents should be displayed), the count should be displayed as (no. of agents selected)/total number of agents. Upon selection, the 'Next', button will be enabled for clicking and the user will be taken to success screen confirmation that the agents are added.
- When the user taps on 'Add Members' option, pull up screen opens for the user to add members. The header is 'Add members', below which the total number of members (excluding the already added members should be displayed), the user can selected all the when the user selects and deselect upon tapping on 'Select All', or 'Deselect All' button when the user selects, the count should be displayed as (no. of members selected)/total number of members. Upon selection, the 'Next', button will be enabled for clicking and the user will be taken to success screen confirmation that the members are added.

d. Adding members from the Helpdesk chat screen

1   2
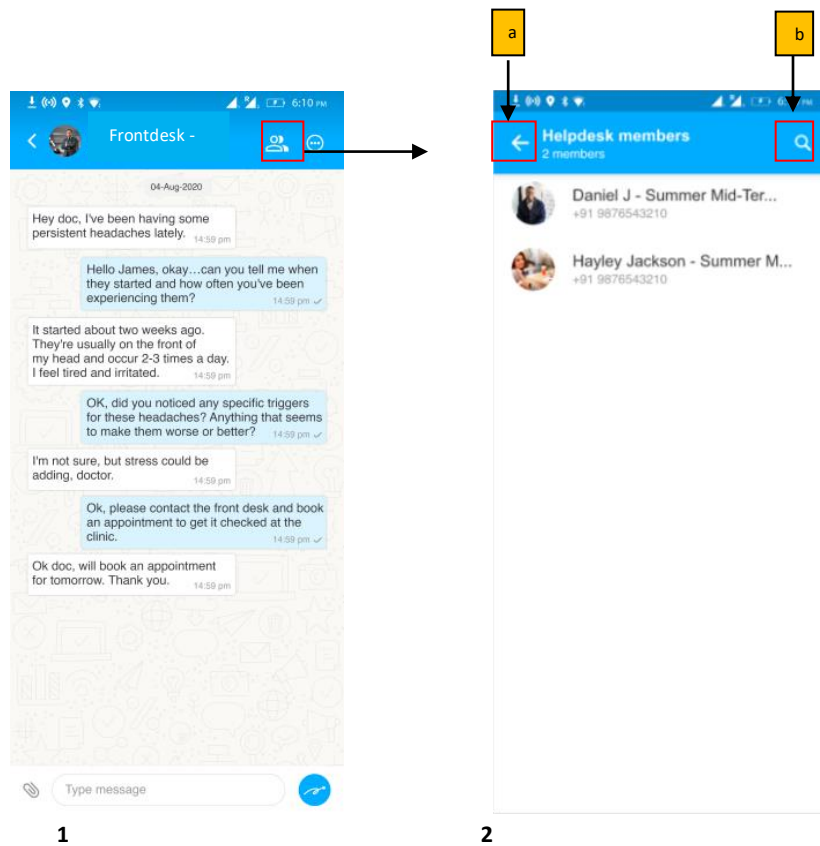
Screen 1: Once the helpdesk group chat screen opens, an icon is added on the top right, next to the left of the search button.

Screen 2: Once the agent taps on the icon, a page with the list of Helpdesk members will be shown. The agent selects any one of the members and sends the message
   a. When the agent taps on the back button, they should be taken to the helpdesk group.
   b. When the agent taps on the search button, they should be able to search for the members of that particular helpdesk group by name.

4   5
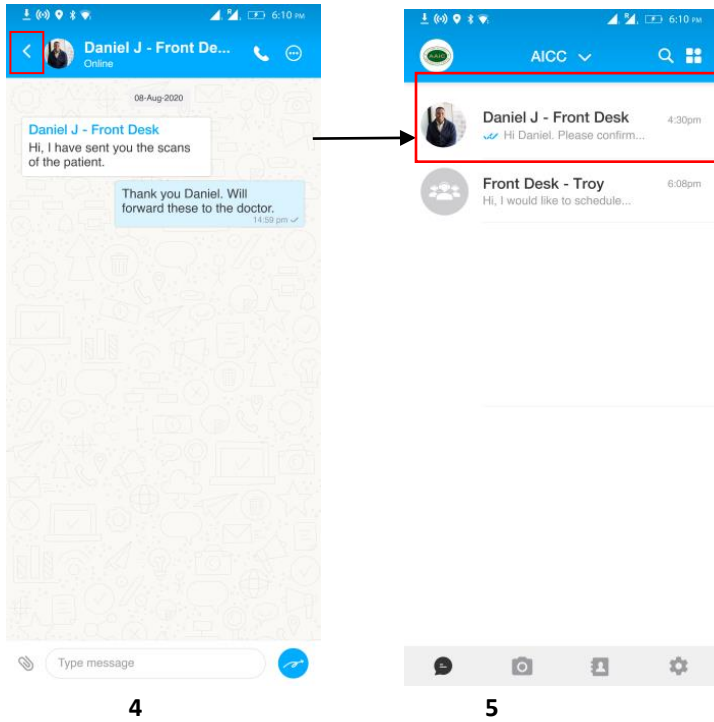
Screen 4 The user will be taken to the 1:1 chat screen. When the user taps on the back button, should be taken to the connect inbox.

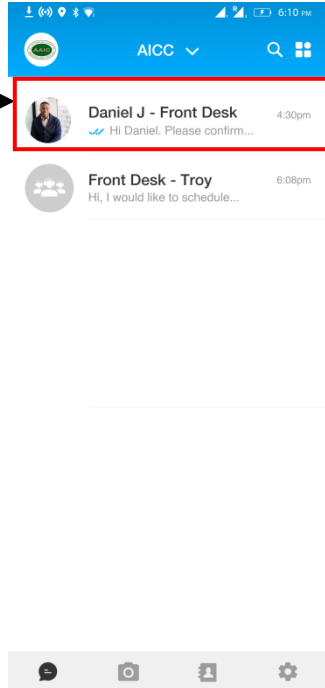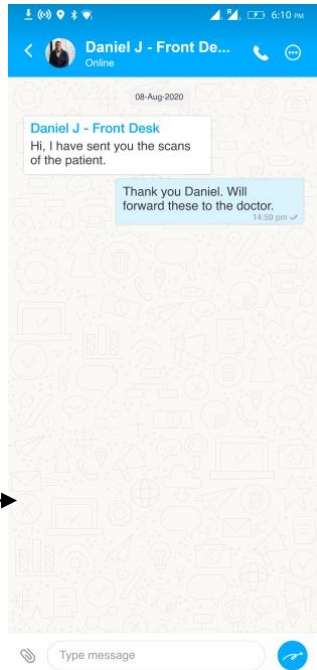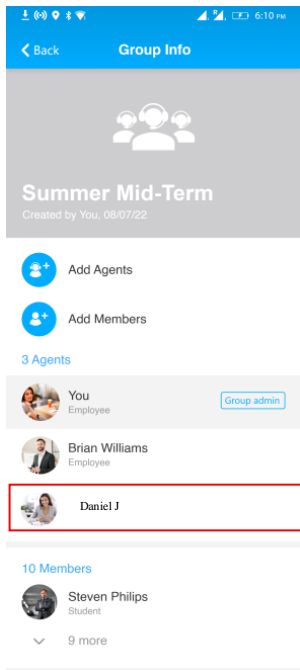**Screen 5:** if the agents chat with the members it should be updated in the Connect inbox.

<u>**Option 2:**</u>

The agents can also message the members upon tapping on the member name in the group info page, as shown below.

e. Ability to Find helpdesk based on the location

1   2   3
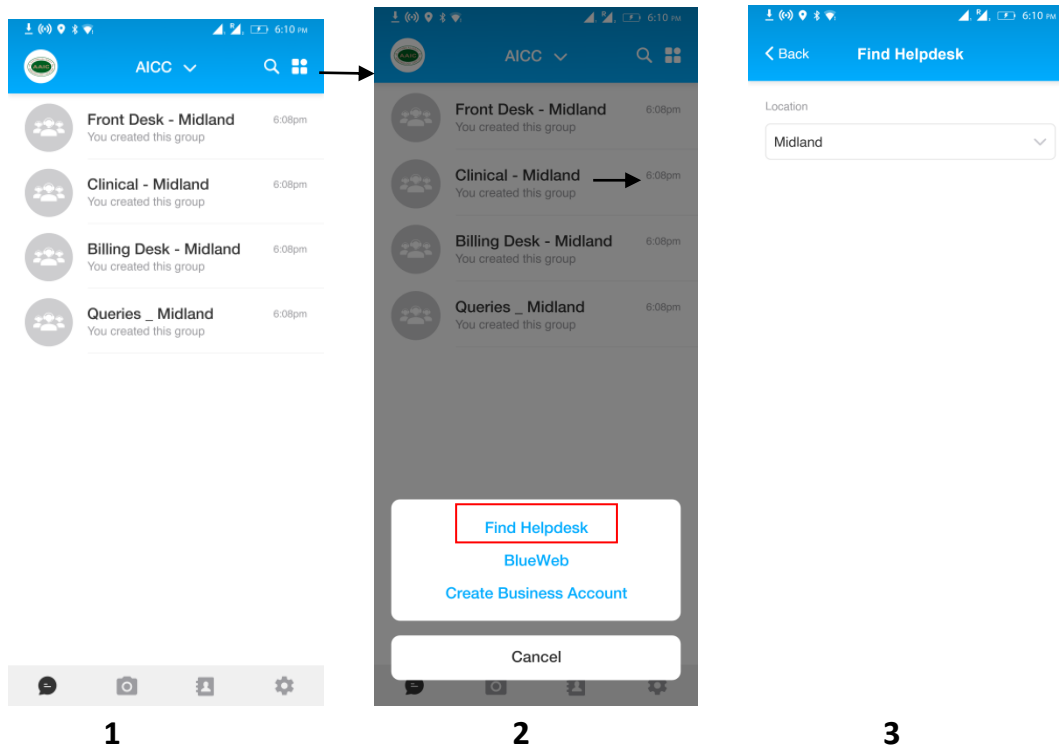
Screen 1: User in the workspace will see the location-based helpdesk.

Screen 2: If the user wants to Find helpdesk, will see an option 'Find Helpdesk' upon taping on the menu item in connect inbox.

Screen 3: The user will be taken to a new screen where the user will see his/her default location. The header of the page will be "Find Helpdesk" and if the user taps on the back button, will be taken to the Connect inbox.

4

5

6

7
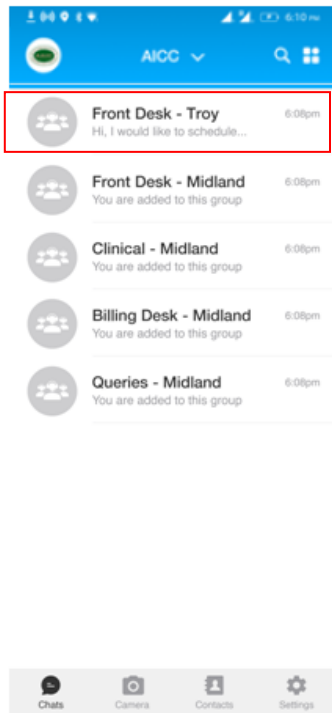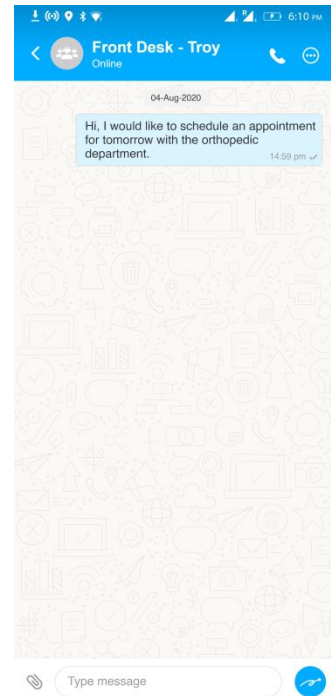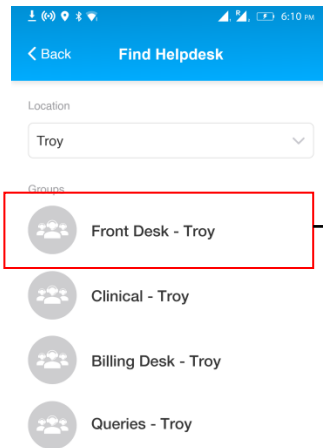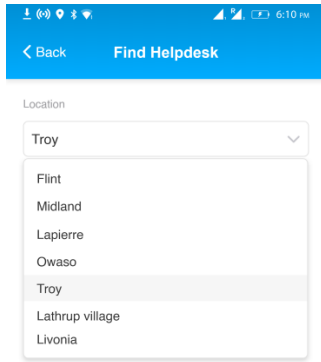
Screen 4: To change the location, the user needs to tap the location's drop-down button, which will then display pre-populated location options.

Screen 5: The user will see a list of helpdesk groups based on the selected location and can choose one group at a time.

Screen 6: When the user taps on any helpdesk, they will be taken to the helpdesk group chat screen and can send messages. When the user taps the back button, they will be returned to the Connect inbox.

Screen 7: The newly selected helpdesk will appear at the top of the chats.

Upload Chat History into Carefluence EMR

The chats between the patients and the practice such as Doctors, nurse etc. will be uploaded into the EMR for the compliance purpose.

Chats upload process:

- For each patient, a document will be created every day. The cut-off timing is 11:59:59 pm. This document will include all conversations involving each individual in the clinic and patients, if any conversation takes place.
- In case there are any images and PDF, it will be uploaded into EMR (Electronic Medical Record) first, then take EMR link and amend the PDF document with that link
- If there are any files other than images, they will be indicated as '<file name> is a video. Please refer to BlueSecures.' File formats not supported by the EMR include video, audio, location, and documents other than PDF. The accepted file formats for the EMR are images (JPG and PNG), text, and PDF.
- Data between 12:00 am and 11:59:59 pm will be uploaded to the EMR from BlueSecures server. The data upload slots start at 1 am and continue based on the size of the data. The data will be uploaded to the EMR in PDF format.

Example:

Title: Medical Communication with Annie on 22-Aug-2023

| Annie	Jackie (Patient ID: 10812)
	Hello doctor, good morning!
Good morning. Please tell me what happened.	
	My prescription has expired. Can you please issue new prescription.
Please send me the existing prescription	
	Thanks
Approved. Our front desk team will issue the new prescription today.	
	<file name> is a document. Please refer to BlueSecures.

Sending invite reminders

The Admin (super admin or business admin) can send the reminder SMS/Text to the invitees to download BlueSecures. When the admin taps the 'Invite' button on the Contacts screen, they should encounter the 'Reminder' option. Upon selecting 'Reminder,' the pop-up screen below will appear.
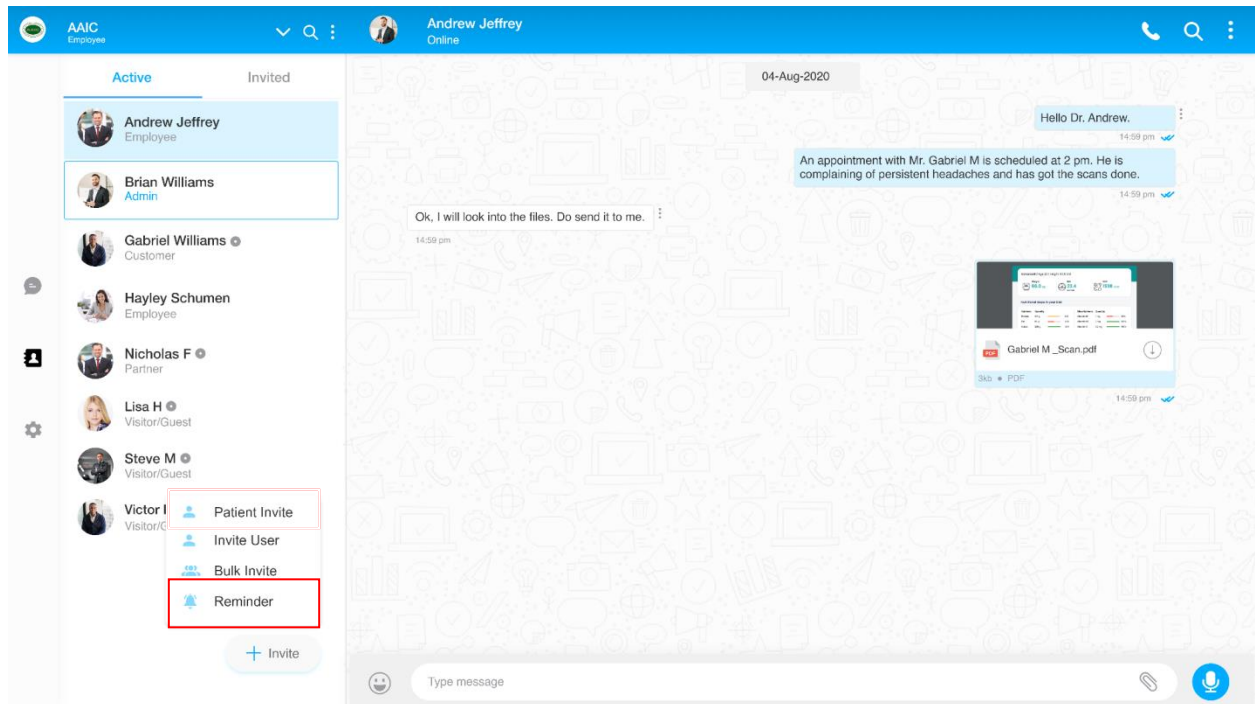
The admin gets confirmation pop-up to send the SMS/Text to the invitees
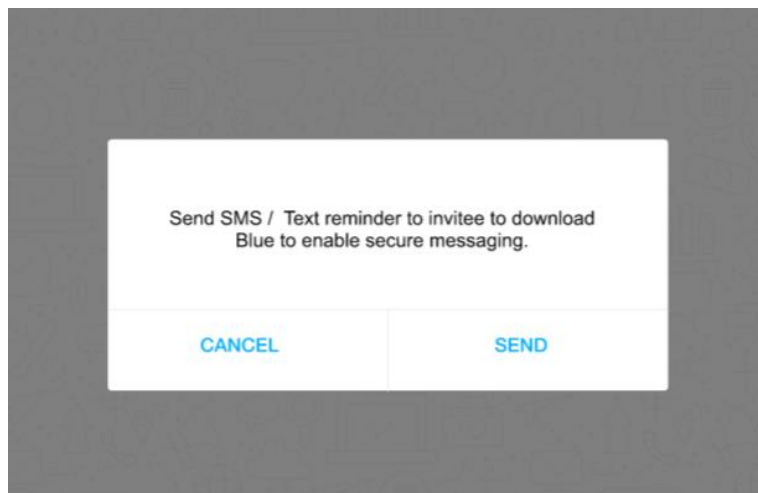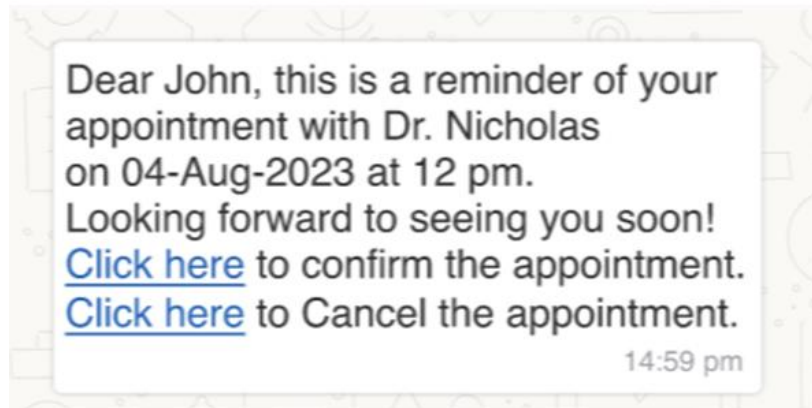
The admin will see the confirmation message that the reminder is sent to the invited users.
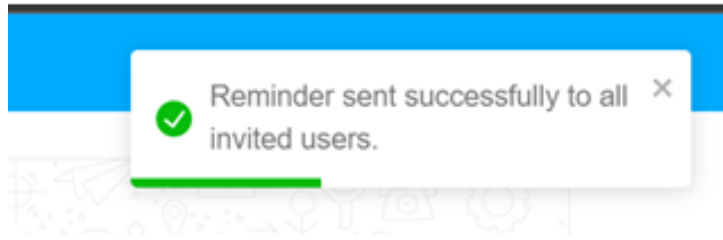
Sending appointment reminders

The patient receives a reminder message on BlueSecures as shown below on their BlueSecures.

Dear John, this is a reminder of your appointment with Dr. Nicholas on 04-Aug-2023 at 12 pm. Looking forward to seeing you soon! Click here to confirm the appointment. Click here to Cancel the appointment.

14:59 pm

When the patient confirms the appointment by tapping the link shown above, they will see the following message. The confirmation response will be updated in the EMR. If the patient cancels, the cancellation response will also be updated in the EMR.