cFIVE SOLUTIONS

cFive Catalyst
Quick Start Guide

Sending & Receiving Messaging

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Data-driven
Outcomes

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This Quick Start Guide provides step-by-step instructions to allow users to familiarize themselves and efficiently use cFive Catalyst's Messaging component.

Additional Learning Resources

cFive provides a library of learning resources at our website at: https://www.cfive.com/covid-19-support-program-resources

The Online Resource Page contains a variety of informational resources including Quick Start Guides, Videos and informational documents. There are a series of Videos that partner with the Quick Start Guides to provide additional information and visual reference for the topics.

Minimum Phone Operating Systems Supported

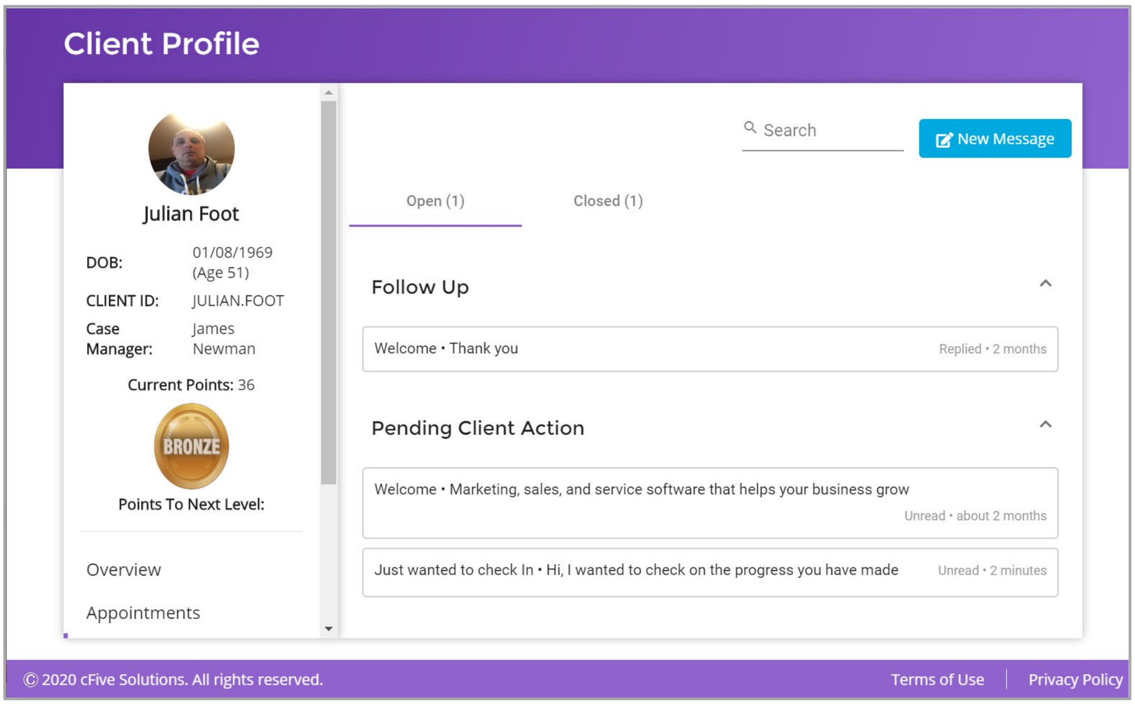
In order to maintain stringent security protocols, cFive can only support Catalyst installed on these Operating Systems:

ANDROID: Version 6, Marshmallow from October 5, 2015 and above

iOS: iPhone 6s or above with the latest iOS operating system 10

The **Messages** home screen provides a great deal of information at-a-glance. If you are in the "Open" screen, all Open messages will show in this area.

NOTE: It is important to understand that in order for a Client to be able to send a message to their Officer from their smartphone the Client must first be fully enrolled AND the Officer needs to send them at least one message using their portal (Desktop dashboard). **Best Practice:** Send each client a welcome message via the "New Message" button when you initially enroll them. Allow them to reply to the welcome message, so you can help familiarize your client with the messaging function.



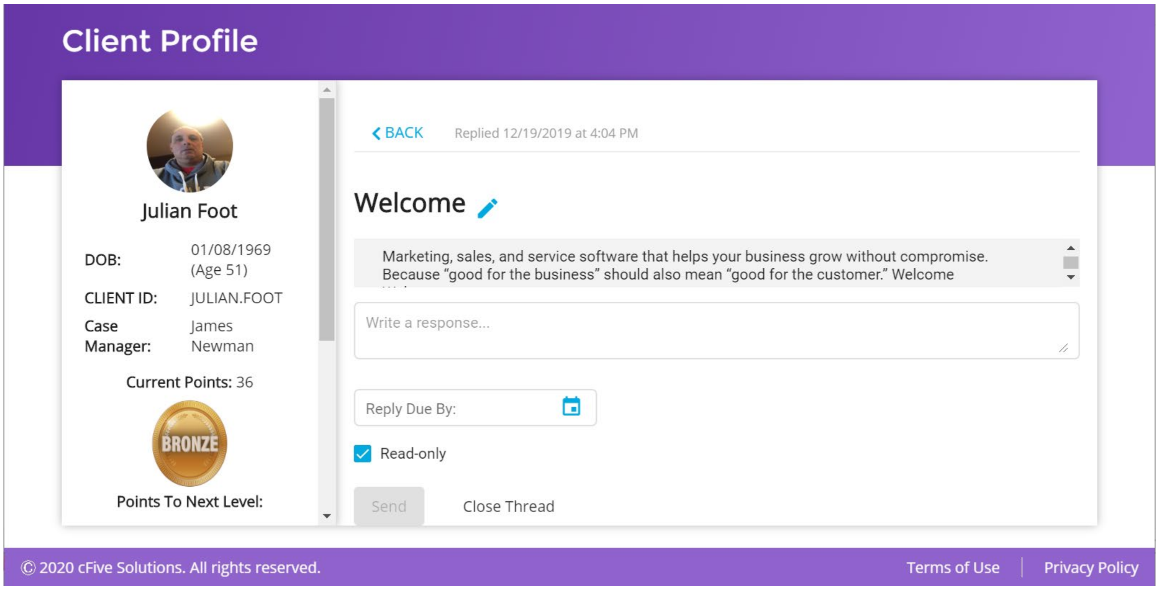
Follow Up Section: Here you can quickly identify which messages need Follow Up by you.

You may choose to keep a Message open as long as you choose. A message is this area could indicate that the Client is waiting for a response from you, or it may be a prompt to remind you to close out the message.

Pending Client Action: Lets you quickly see the items that are awaiting client response. To help you easily identify which message needs action, the display box shows you the subject line of the message, followed by a dot icon and the first few words of the message.

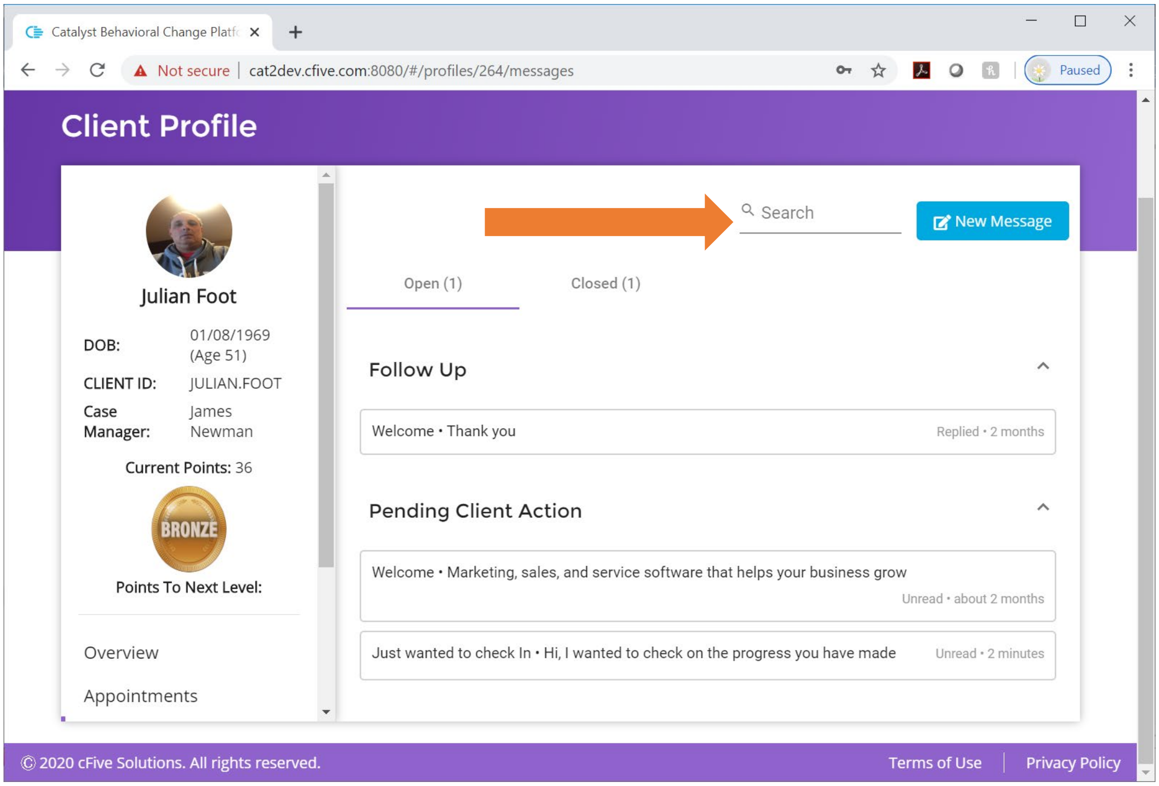
The gray text in the Message's display box provides at-a-glance information about if the message was replied to, read, etc., and provides a general time frame in which that action was taken.

TIP: You can click on the text in the display box in either section to be redirected to the full Message.

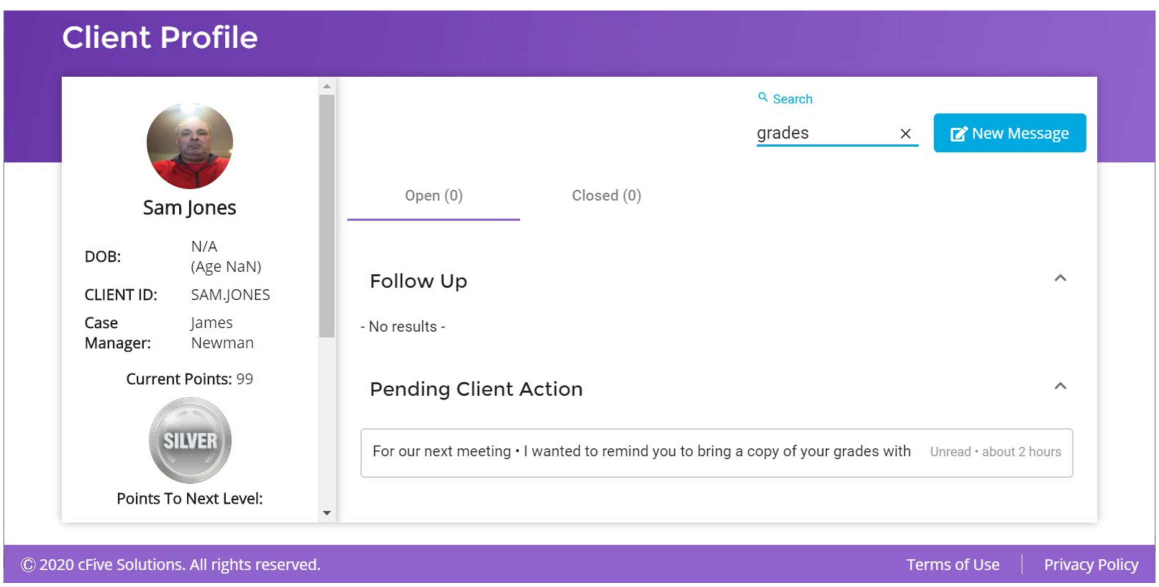


Message Search

The **Search** function on the Messages home page allows you to search the content of all messages by keywords, phrases, or dates.



Step 1: Simply **Enter the desired search text** in the Search field. Catalyst will display all messages that meet that search criteria for that specific Client.

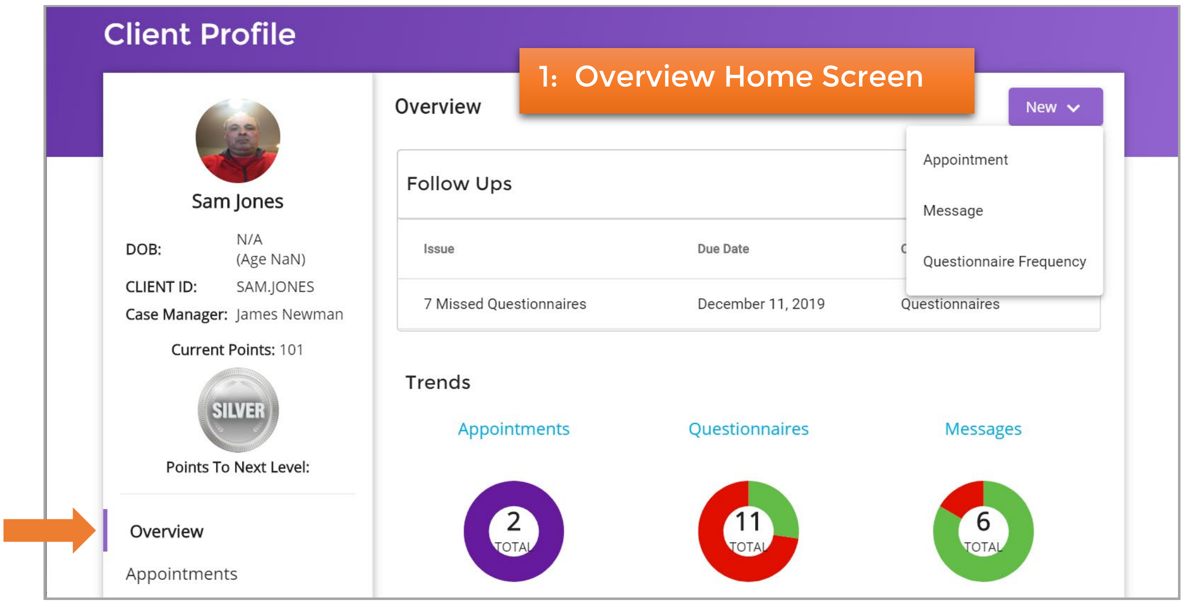


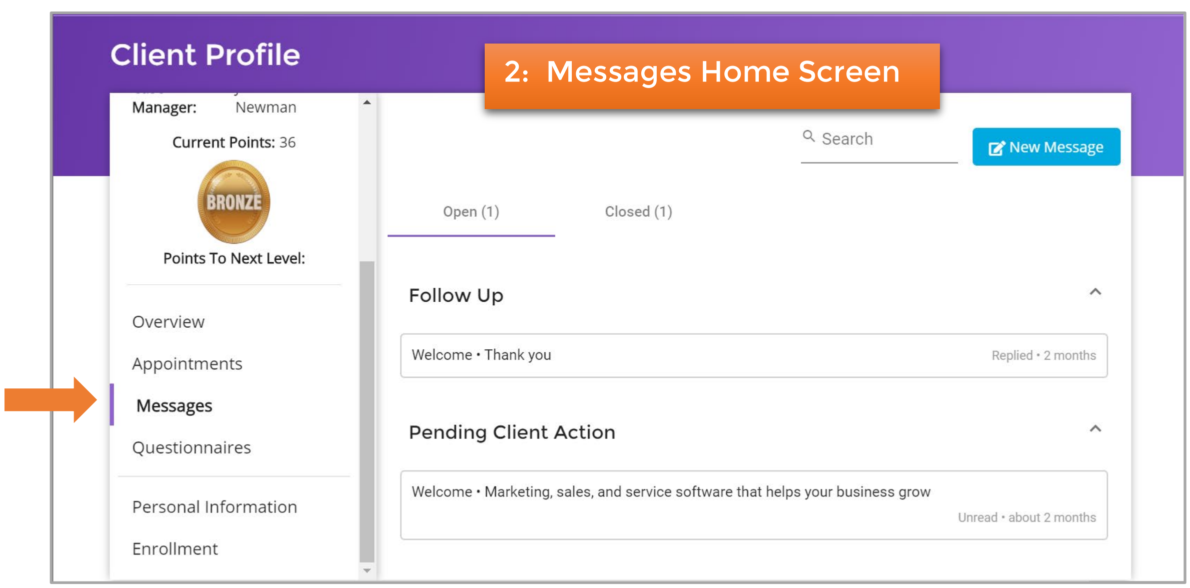
From there you can click on the display box and open the message.

NEW MESSAGE

The creation of a client **Message** will automatically send the Message to the client's Mobile App, and allow the client to read and, if required, respond to the Message. Notifications of Messages are provided to the Client and the frequency is driven by global notification settings.

You can create a new message from two areas within Catalyst: (1) Using the drop-down menu in the Client Profile Overview screen and (2) from the home page of the Messages section.





Create a New Message

Step 1: From within the **Message** screen, click on the "**New Message**" button.

You will be taken to the Message template.

Fields to be completed include:

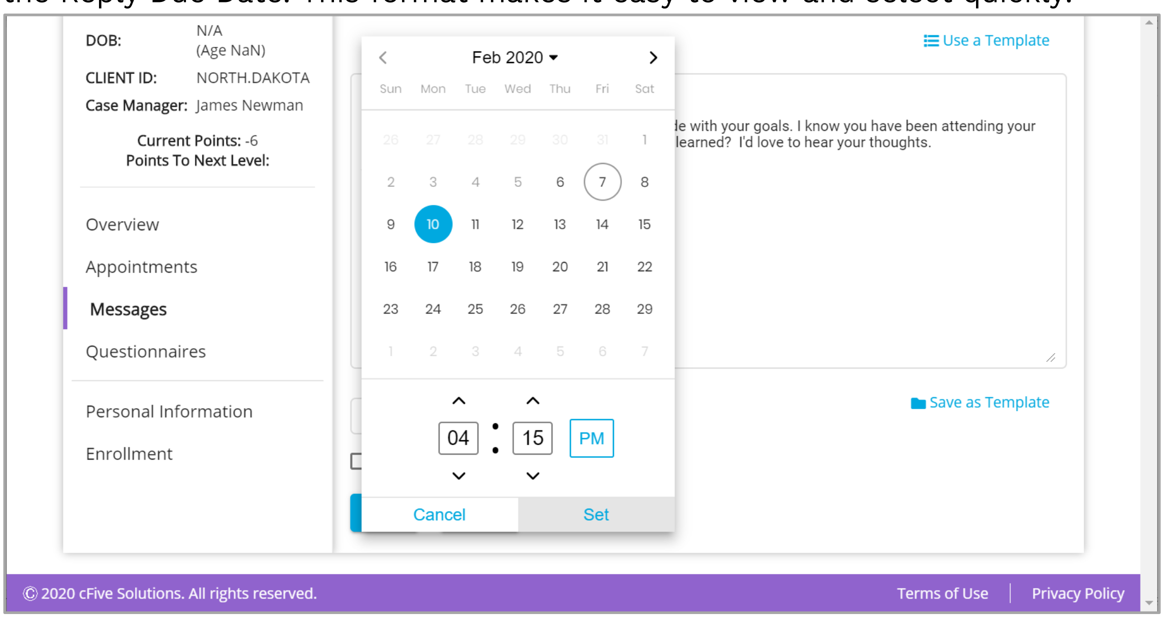
- **Message Subject**
- **Message Body**
- **Reply due by date**

The user can enter two types of messages: Messages that either require/allow a reply, or a message that does not require/allow a reply ("Read-only).

Step 2: Create a message that **does** require/allow a reply:

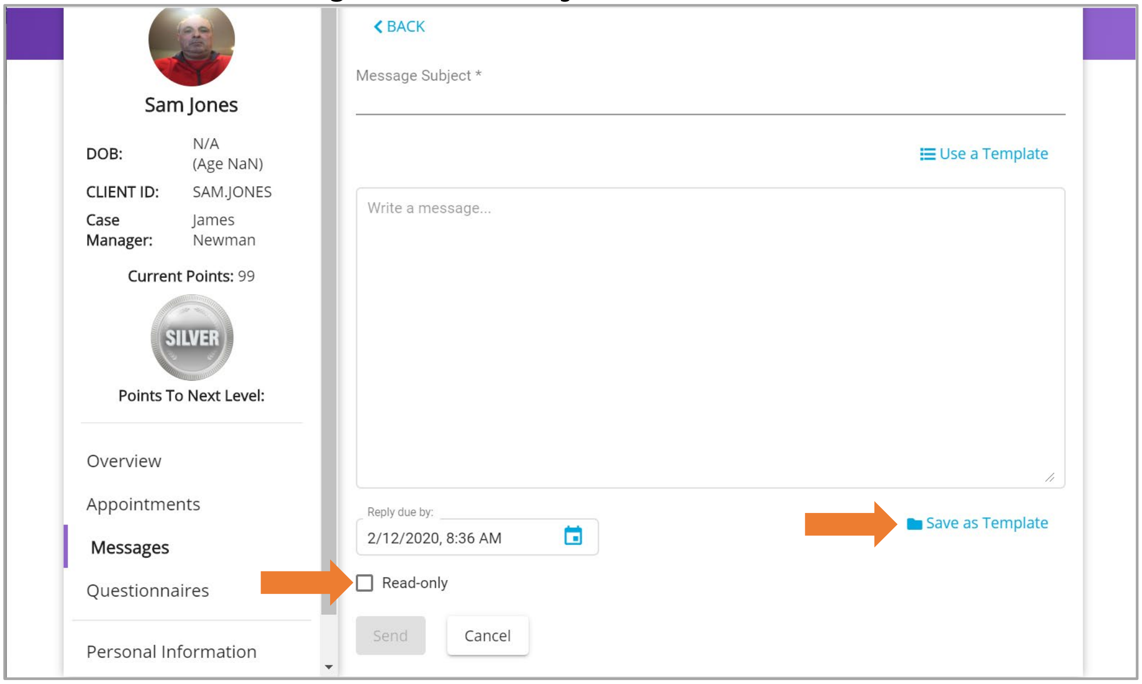
1. Enter the **Subject** line,
2. Compose the **Message**, and
3. Set the **Reply Due By date**.

Catalyst features a quick fill calendar and time clock to use when choosing the Reply Due Date. This format makes it easy to view and select quickly.

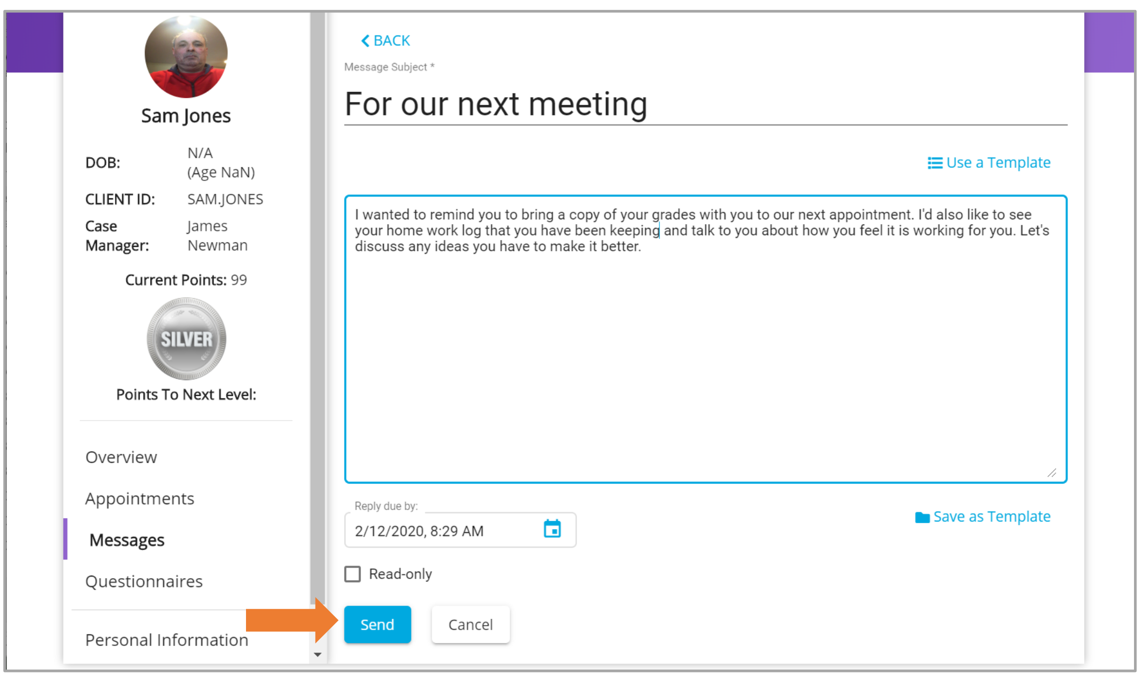


OPTIONAL: The two orange arrows below show where you have the option to:

- Save the message as a template for future use
- Mark the message as "**Read-only**"

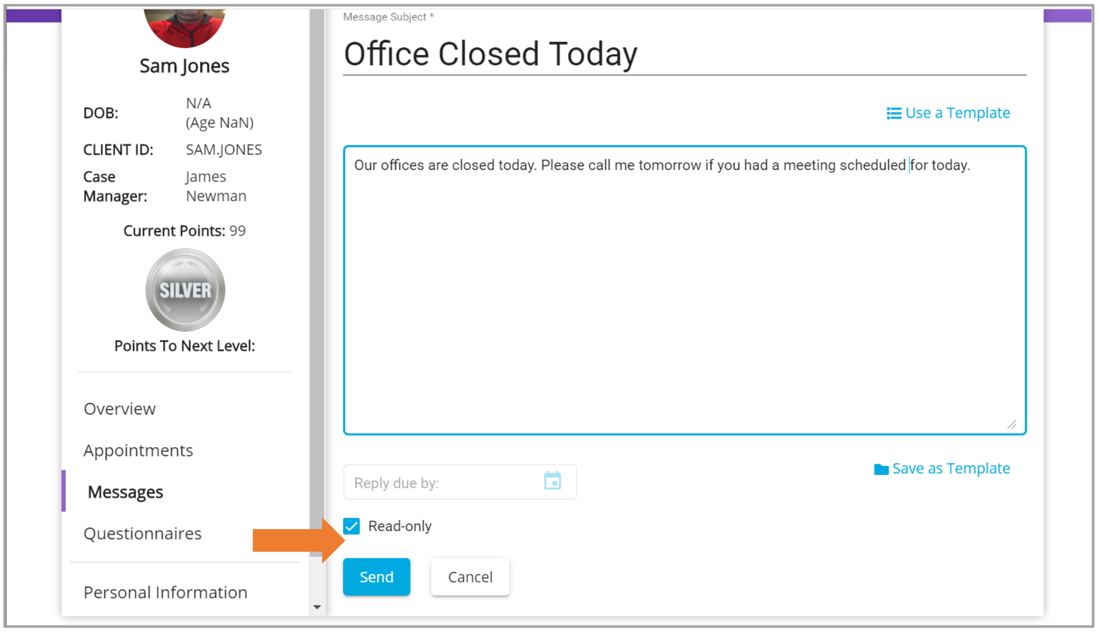


Step 3: When all required fields have been completed, the "**Send**" button will change colors from grey to blue. When it is blue you can send the message by clicking on the Send button:



Sending a Read-Only Message

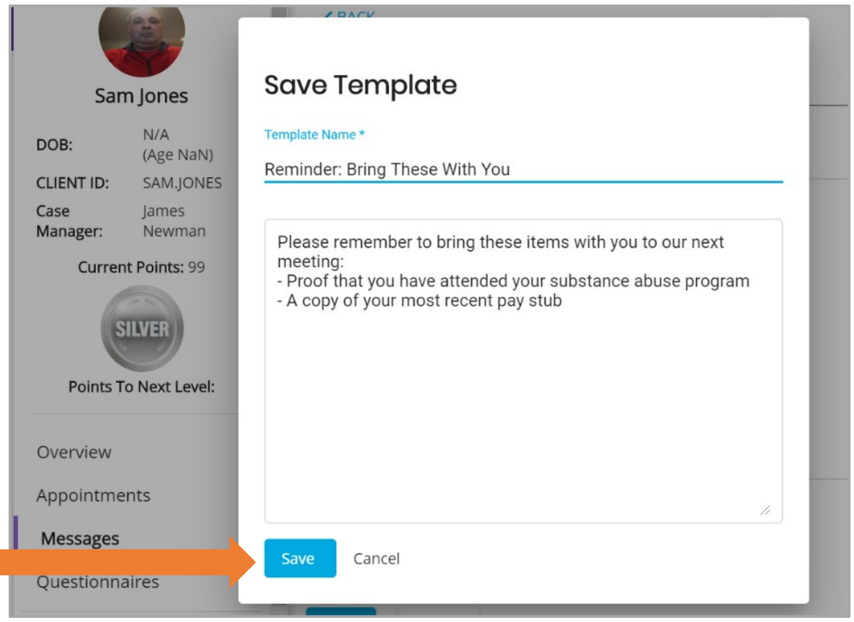
Checking the "**Read-only**" box means the client will be able to read the message, but will not be able to respond to the message.



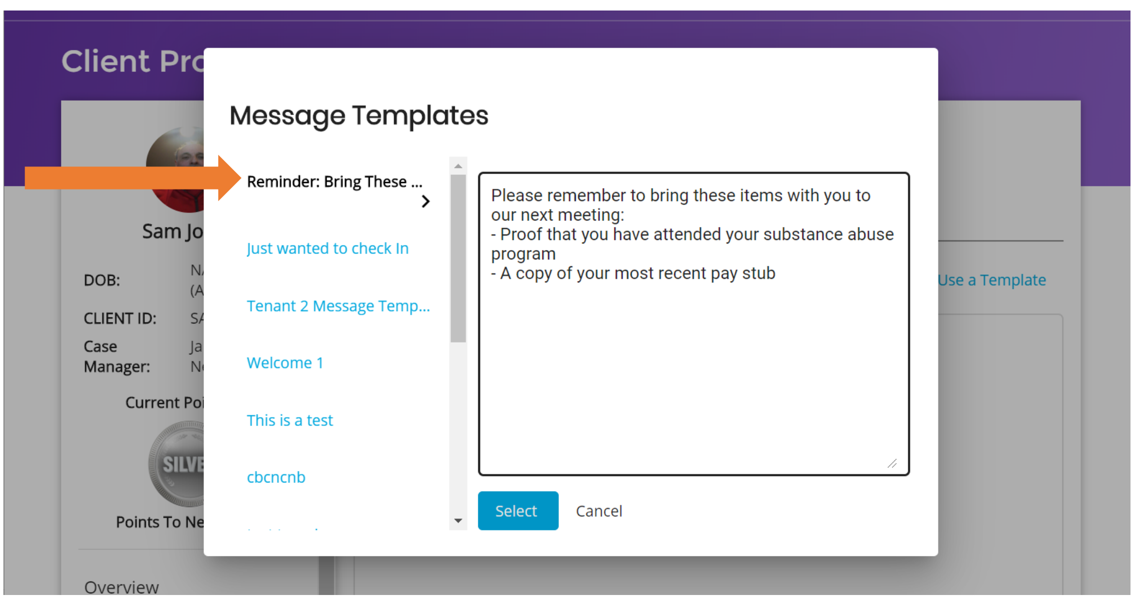
CREATING A MESSAGE TEMPLATE

Templates provide you the ability to create a library of frequently used messages that you can use with all clients. This helps users eliminate the time and effort needed to re-create messages multiple times, helps eliminate typos, and saves time.

Step 1: Create the Message, then select the "**Save as Template**" icon.



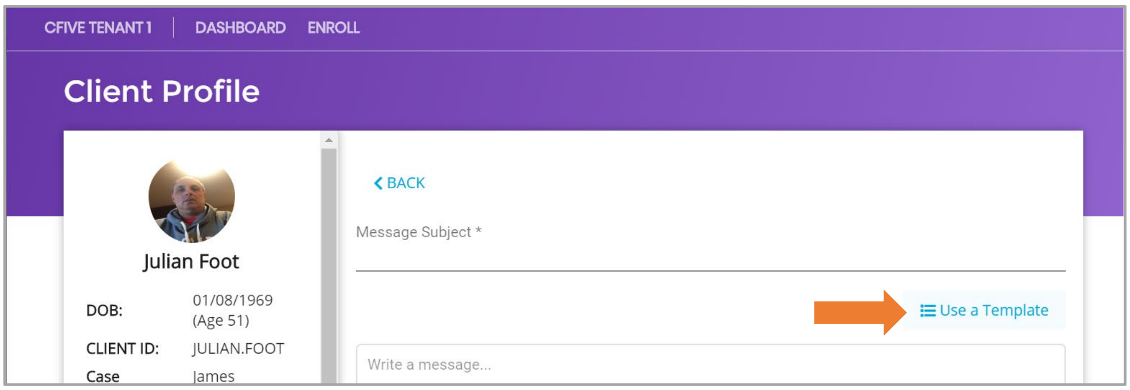
In the **Message Templates** library, the "Subject" line of the message you created will be saved as the name of the template.



Use A Template

Step 1: From within the **Message** screen, click on the "**New Message**" button.

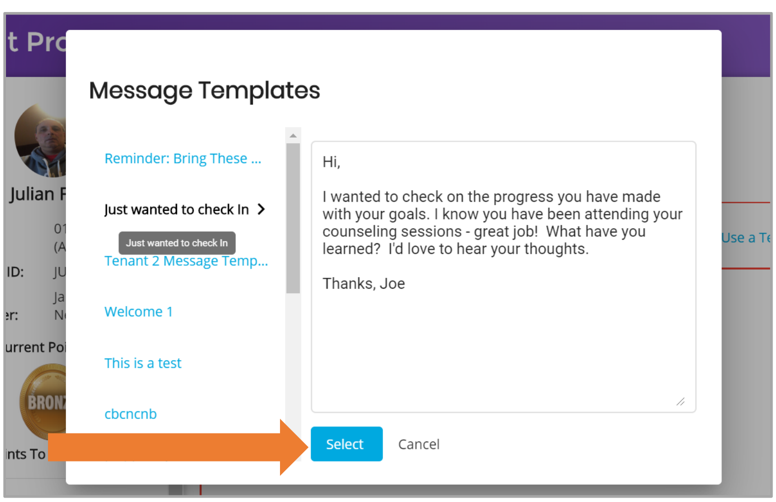
Step 2: From within the **New Message** screen, click on the "**Use a Template**" icon.



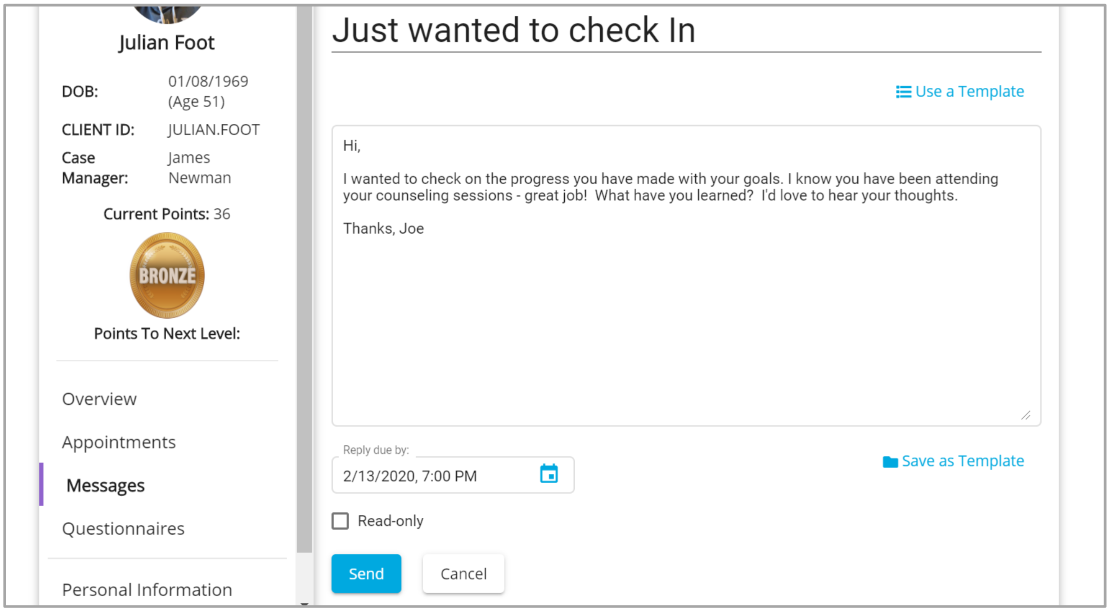
Step 3: The **Message Templates** screen will pop up. The list of available templates will display on the left-hand column.

Step 4: **Mouse over the list**, and **click on the name of the Template** you want to choose.

Step 5: When you have selected the template, it will display in the message screen. Click on "**Select**" to choose that template.

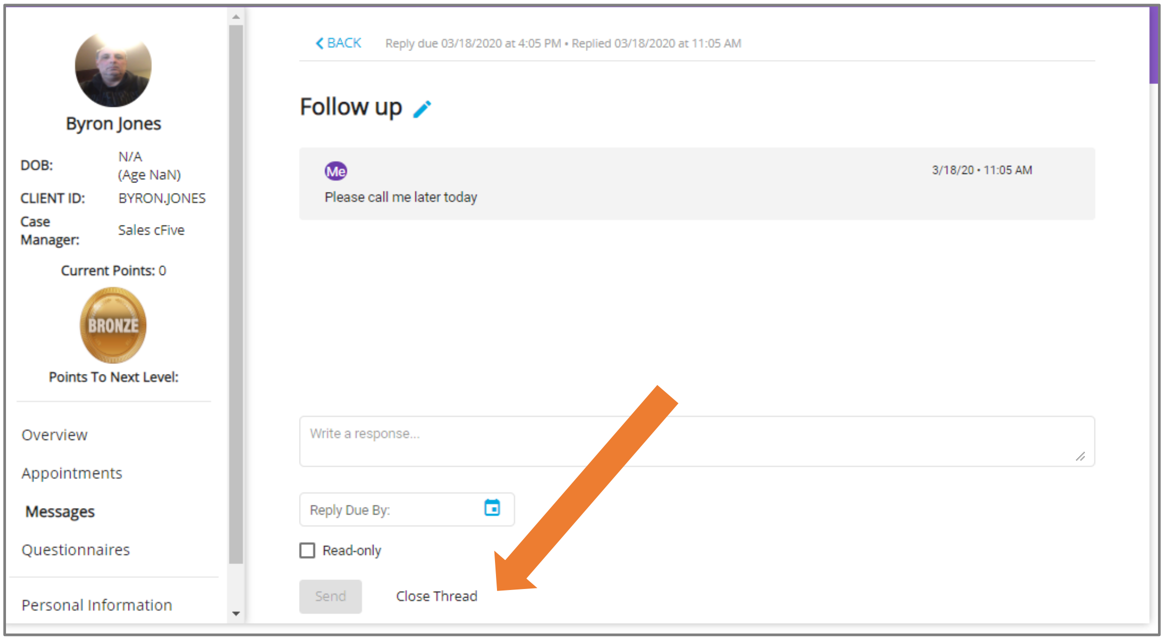


Step 6: The selected template will populate in the Client's Message portal. Here you can send the message exactly as it was created in the template, or edit the message to add additional text, provide additional information, etc. After you have made any desired edits, **Select** the "**Read by Date**", check the "**Read-only**" check box if desired, and click "**Send**."

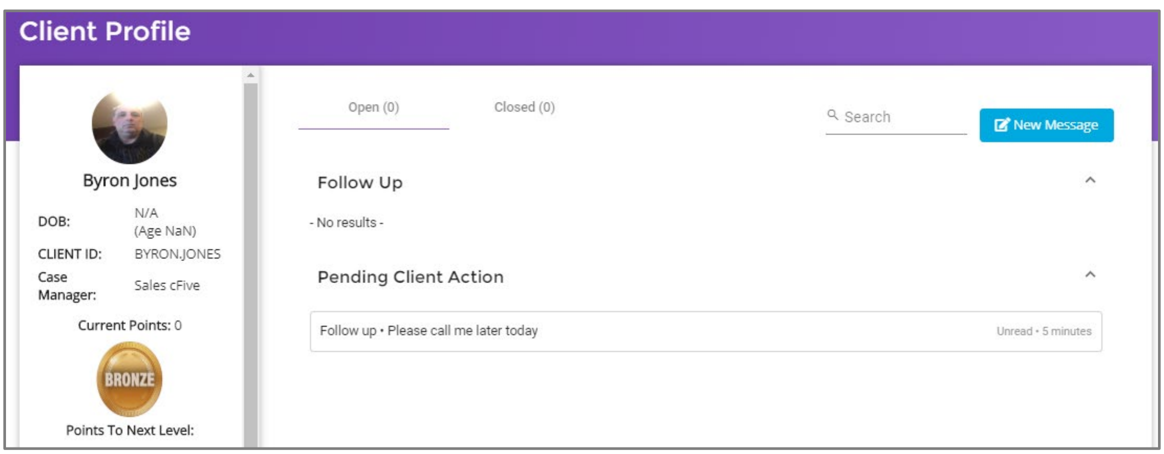


Step 7 Once you click the Send button, the system will keep the history of the message.

Step 8 Close message and place in history. A user can close a message thread so that no additional message can be sent or received. To do that, just open the message and check "Close Thread." This will move the message to close. It's a good idea to close threads so that you can keep the most import information in front of you on your dashboard.



Please note that the Message Summary screen will update the "**Read by Client**" column once the client opens the message on the mobile.



What to Expect on the Catalyst Mobile App

The Client will log into the mobile App and see a notification that reminds them to read unread messages.