



cFive Catalyst Quick Start Guide

Sending & Receiving Messaging



**Data-driven
Outcomes**

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INTRODUCTION

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

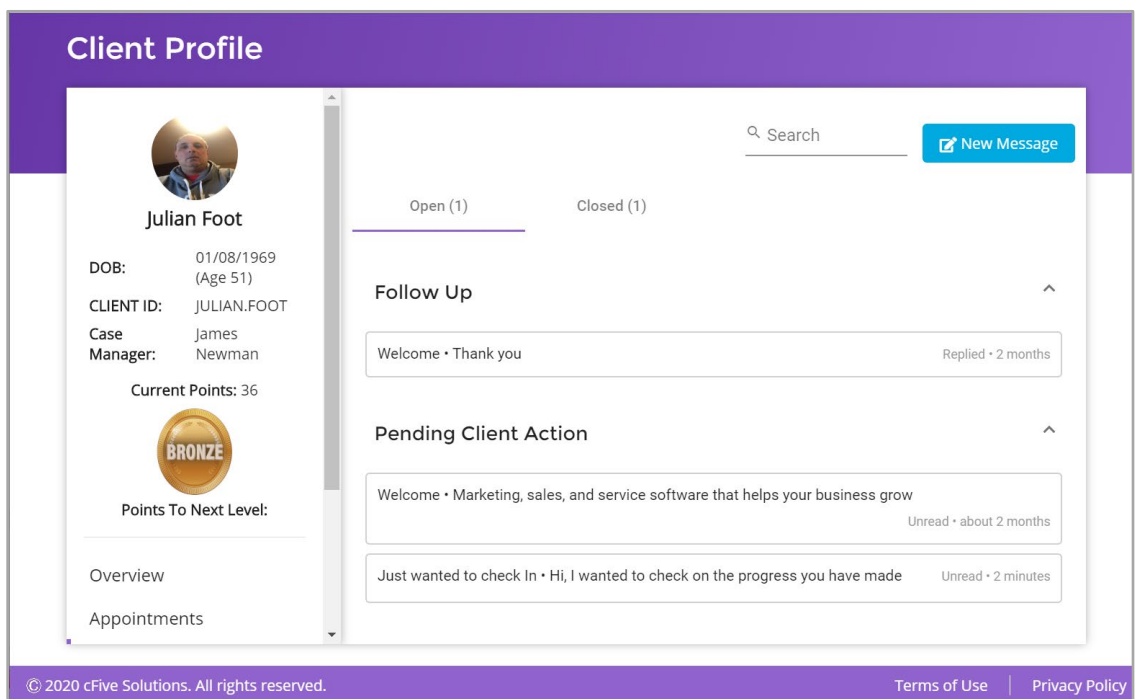
iOS: iPhone 6s or above with the latest iOS operating system 10



MESSAGING

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 in 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.

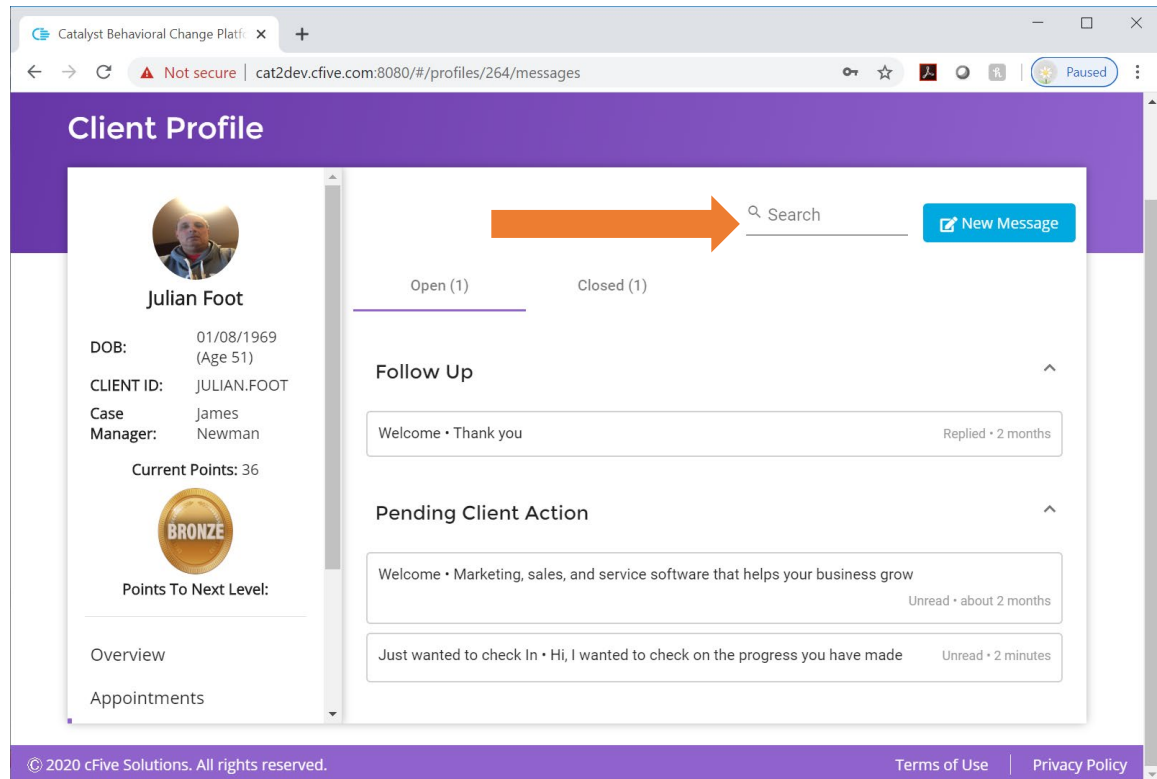
TIP: You can click on the text in the display box in either section to be redirected to the full Message.

The screenshot displays a web interface titled "Client Profile" with a purple header. On the left, a sidebar shows the profile of "Julian Foot", including a profile picture, DOB (01/08/1969, Age 51), CLIENT ID (JULIAN.FOOT), Case Manager (James Newman), Current Points (36), a "BRONZE" badge, and "Points To Next Level". The main content area shows a message thread. At the top, it says "< BACK" and "Replied 12/19/2019 at 4:04 PM". The message content starts with "Welcome" followed by a blue pencil icon. Below this is a gray text box containing the text: "Marketing, sales, and service software that helps your business grow without compromise. Because 'good for the business' should also mean 'good for the customer.' Welcome". Underneath the text box is a "Write a response..." input field with a blue pencil icon. Below the input field is a "Reply Due By:" field with a calendar icon. A "Read-only" checkbox is checked. At the bottom of the message area are "Send" and "Close Thread" buttons. The footer of the interface contains the copyright notice "© 2020 cFive Solutions. All rights reserved." and links for "Terms of Use" and "Privacy Policy".

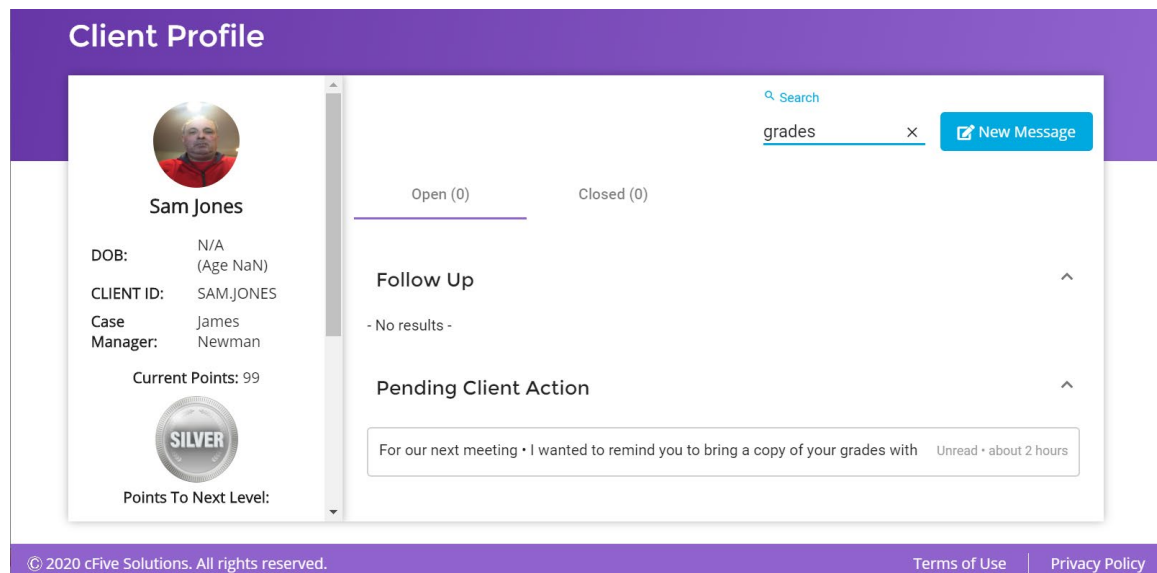


MESSAGE SEARCH

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.

Data-driven Outcomes



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.

Client Profile

1: Overview Home Screen

Overview

Follow Ups

Issue	Due Date	Questionnaires
7 Missed Questionnaires	December 11, 2019	Questionnaires

Trends

- Appointments: 2 TOTAL
- Questionnaires: 11 TOTAL
- Messages: 6 TOTAL

Client Information:

- Sam Jones**
- DOB: N/A (Age NaN)
- CLIENT ID: SAM.JONES
- Case Manager: James Newman
- Current Points: 101
- SILVER
- Points To Next Level:

Left Sidebar:

- Overview (Selected)
- Appointments

New Menu:

- Appointment
- Message
- Questionnaire Frequency

Client Profile

2: Messages Home Screen

Messages

Manager: Newman

Current Points: 36

BRONZE

Points To Next Level:

Left Sidebar:

- Overview
- Appointments
- Messages (Selected)
- Questionnaires
- Personal Information
- Enrollment

Search: Search

New Message: [Button]

Open (1)

Closed (1)

Follow Up

- Welcome • Thank you (Replied • 2 months)

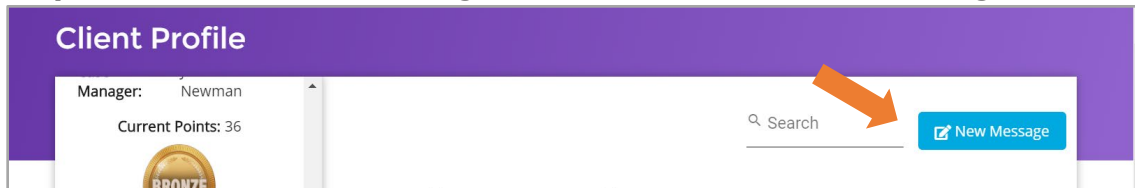
Pending Client Action

- Welcome • Marketing, sales, and service software that helps your business grow (Unread • about 2 months)



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:

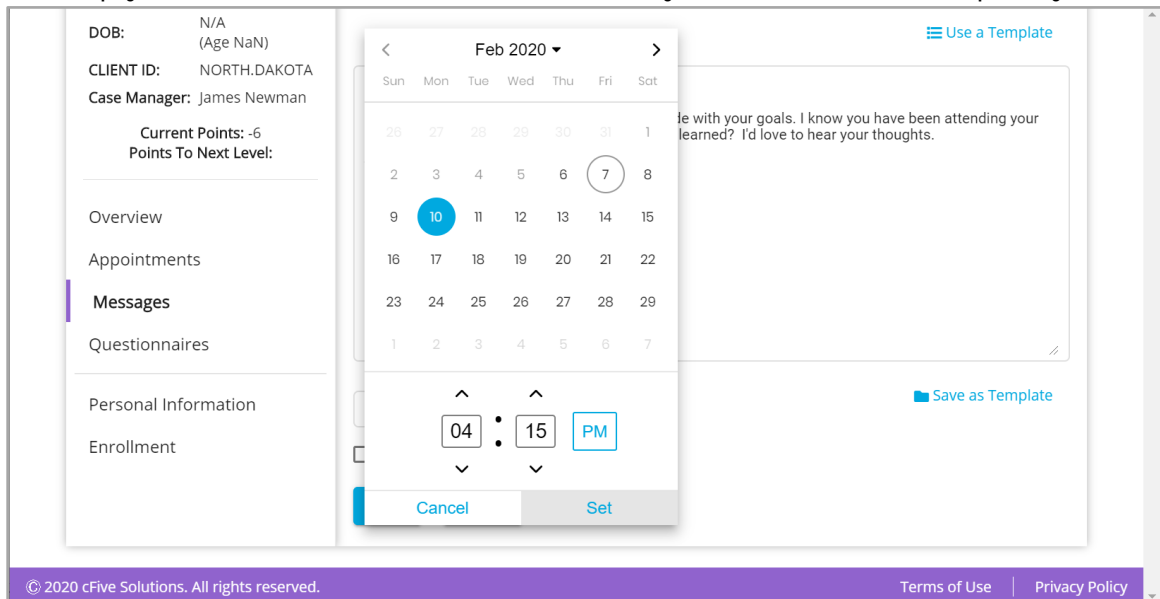
- **Message Subject**
- **Message Body**
- **Reply due by date**

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”**

The screenshot shows the messaging interface for Sam Jones. On the left is a sidebar with a profile picture, name, and details (DOB, CLIENT ID, Case Manager, Current Points, and a SILVER badge). Below this are navigation links: Overview, Appointments, Messages (highlighted), Questionnaires, and Personal Information. The main area has a 'Message Subject *' field, a 'Write a message...' text area, and a 'Use a Template' link. At the bottom, there is a 'Reply due by:' field with the date '2/12/2020, 8:36 AM' and a calendar icon. Below this is a 'Read-only' checkbox, which is currently unchecked. An orange arrow points to this checkbox. To the right of the checkbox is a 'Save as Template' button, also with an orange arrow pointing to it. At the bottom are 'Send' and 'Cancel' buttons.

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:

This screenshot shows the same messaging interface as the previous one, but now the message content is filled in. The 'Message Subject' is 'For our next meeting'. The text area contains the message: 'I wanted to remind you to bring a copy of your grades with you to our next appointment. I'd also like to see your home work log that you have been keeping and talk to you about how you feel it is working for you. Let's discuss any ideas you have to make it better.' The 'Reply due by:' field now shows '2/12/2020, 8:29 AM'. The 'Read-only' checkbox is still unchecked. The 'Send' button is now blue, and an orange arrow points to it. The 'Cancel' button remains grey.



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.

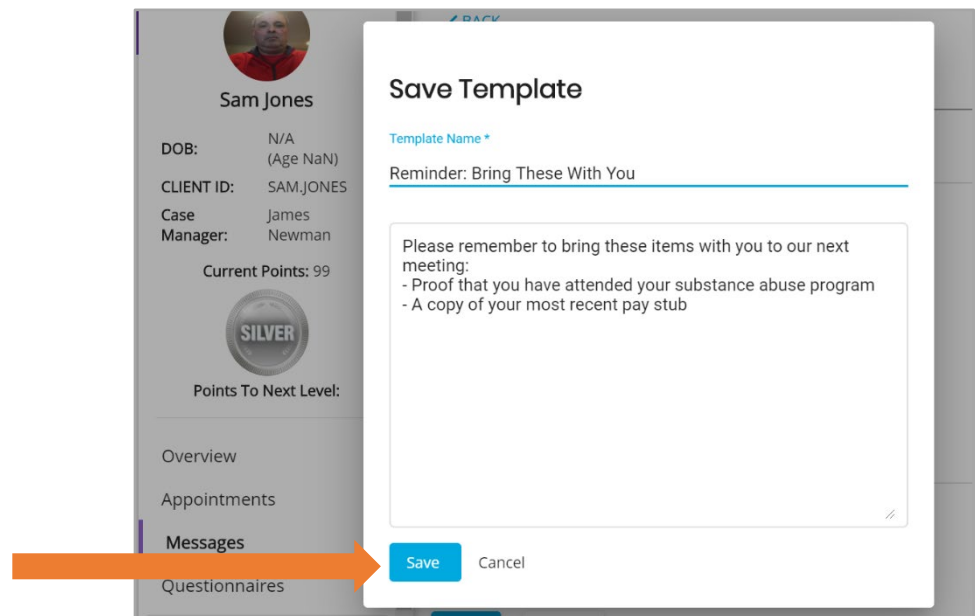
The screenshot displays the Catalyst messaging interface. On the left, a sidebar shows the user profile for Sam Jones, including their DOB, Client ID (SAM.JONES), Case Manager (James Newman), Current Points (99), and a Silver badge. Below the profile, a list of navigation options includes Overview, Appointments, Messages, Questionnaires, and Personal Information. An orange arrow points to the 'Messages' option. The main content area shows a message composition screen with the subject 'Office Closed Today'. The message body contains the text: 'Our offices are closed today. Please call me tomorrow if you had a meeting scheduled for today.' Below the message body, there is a 'Reply due by:' field with a calendar icon, a 'Read-only' checkbox which is checked, and 'Send' and 'Cancel' buttons. A 'Save as Template' button is also visible on the right side of the message body.



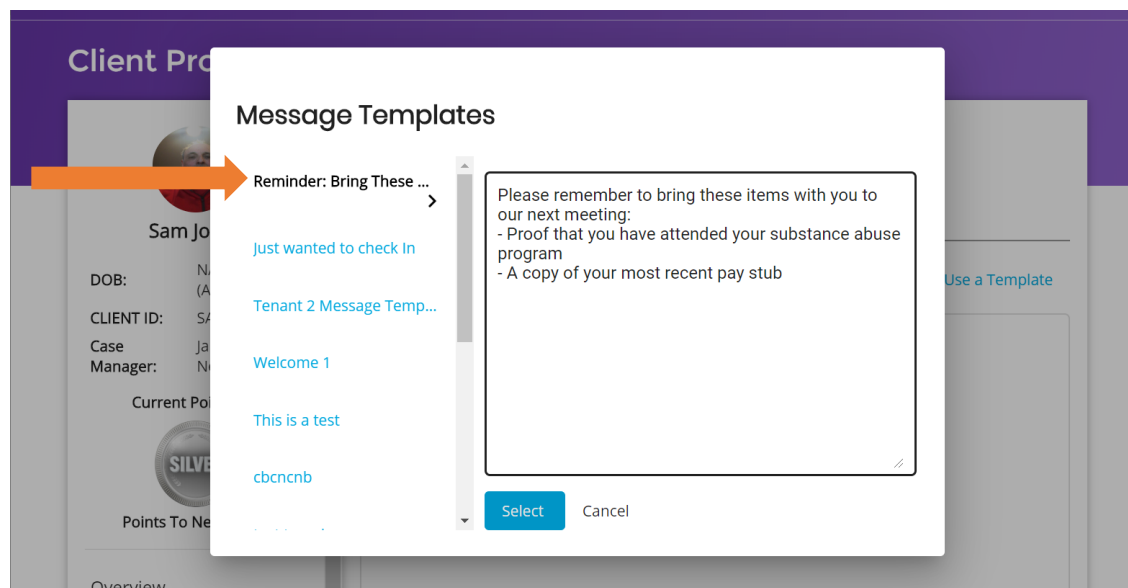
CREATING A MESSAGE TEMPLATE

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.



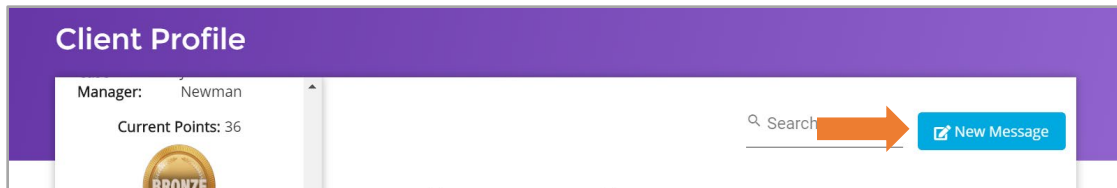
In the **Message Templates** library, the “Subject” line of the message you created will be saved as the name of the template.



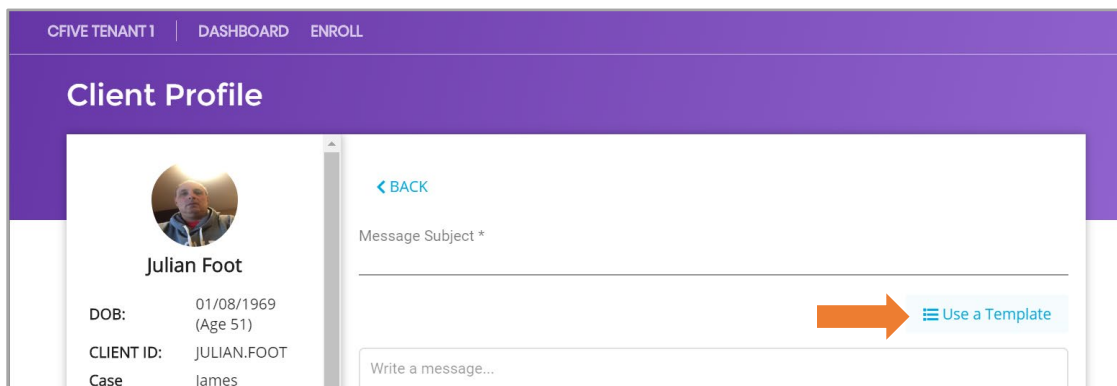


Use A Template

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



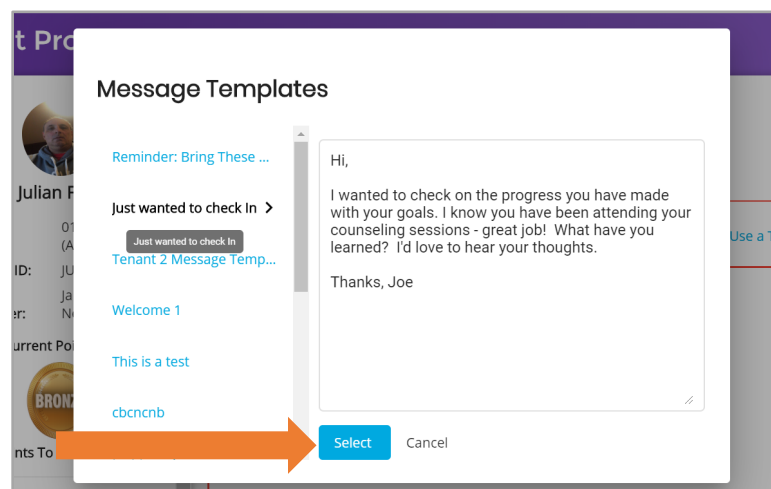
Step 2: From within the **New Message** screen, click on the “**Use a Template**” icon.



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.





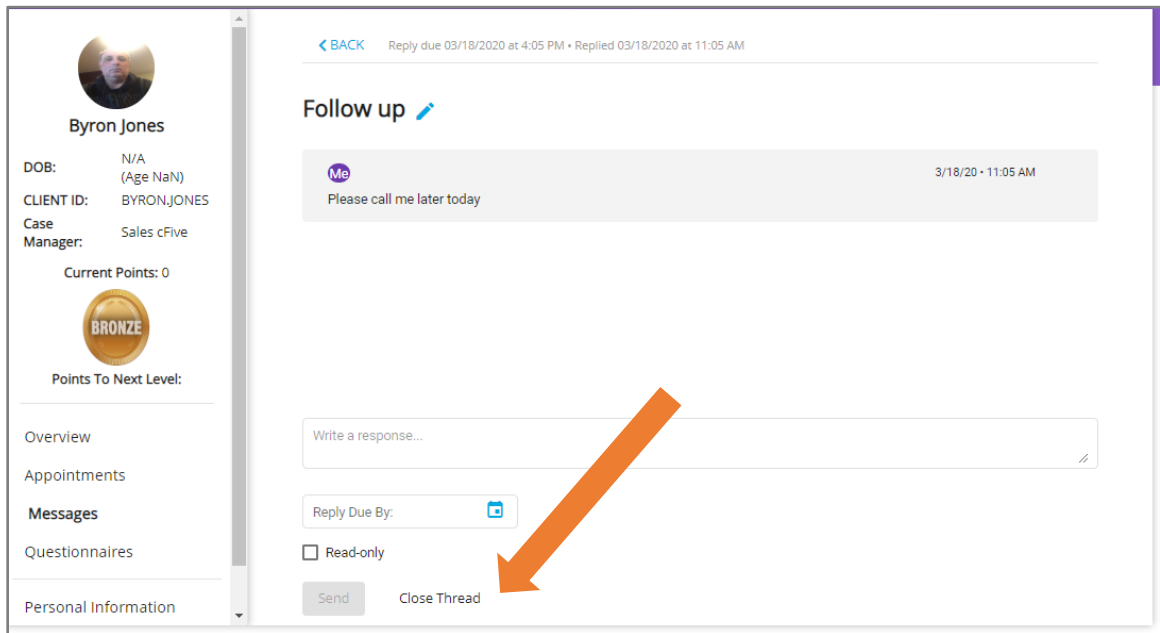
Step 6: The selected template will populate in the Client's Message portal. Here you can send the message exactly as it was created in the template, or edit the message to add additional text, provide additional information, etc. After you have made any desired edits, **Select** the **"Read by Date"**,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

The screenshot displays the 'Client's Message portal' for Julian Foot. On the left sidebar, client details are listed: Julian Foot, DOB: 01/08/1969 (Age 51), CLIENT ID: JULIAN.FOOT, Case: James, Manager: Newman, and Current Points: 36. A 'BRONZE' badge is shown below the points. The sidebar also includes navigation links for Overview, Appointments, Messages (highlighted), Questionnaires, and Personal Information. The main content area is titled 'Just wanted to check In' and contains a message template. The template text reads: 'Hi, I wanted to check on the progress you have made with your goals. I know you have been attending your counseling sessions - great job! What have you learned? I'd love to hear your thoughts. Thanks, Joe'. Above the text is a 'Use a Template' link, and below it is a 'Save as Template' link. A 'Reply due by:' field shows '2/13/2020, 7:00 PM' with a calendar icon. A 'Read-only' checkbox is present and unchecked. At the bottom are 'Send' and 'Cancel' buttons.

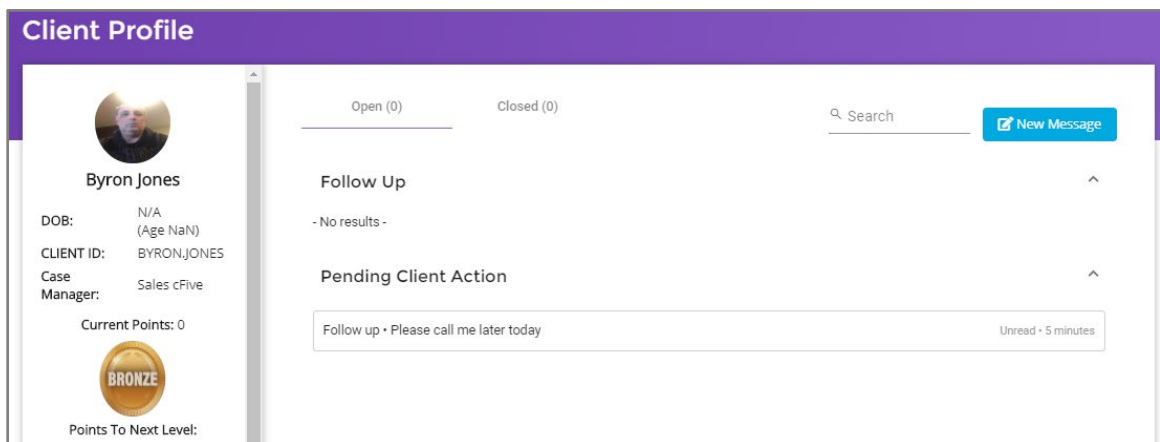
Step 7 Once you click the Send button, the system will keep the history of the message.



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 important 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.

