wellbee

Manual
Version: 1.4

FIXA KAFFE

Gå till kaffema...

Ta fram kaffe

Hämta ett filter

Tryck på on knappen och vänta tills kaffet är klart

▶ Table of content

Create account

Private user

Go to wellbee.app/login. Click "Create Account" and select the license you want to sign.

1. Account:
   - Fill in your name and e-mail address
   - Accept the terms of use
2. User:
   - Choose whether to plan for someone else or for yourself. If there is another person who is a user, fill in his name and email. **NOTE. this step cannot be changed afterwards.**
3. Payment:
   - Enter payment details and click create account.

Welcome email to select password will now be sent to the email address entered.

Organisation

Contact Wellbee at hello@wellbee.app for more information on prices and how to go about signing up for an account.
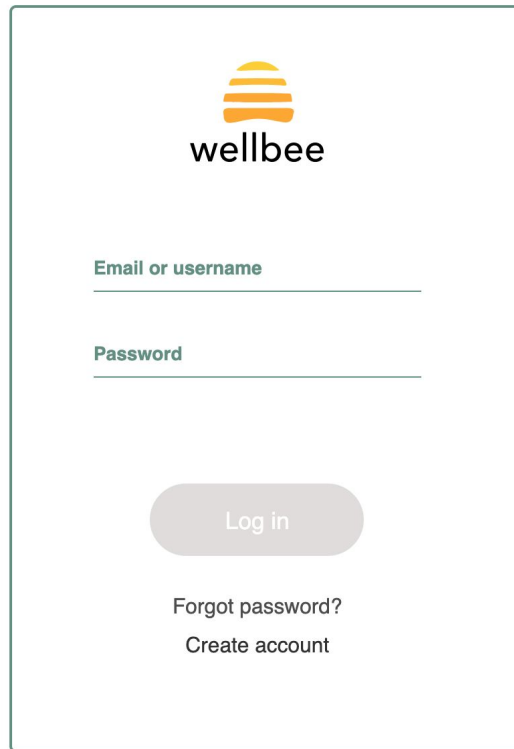

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Sign in & forgot password

Sign in

1. Go to the Wellbee web, app.wellbee.app/login
2. Fill in your username or email
3. Enter your password
4. Click on "Login"

Forgot password

1. Click on "Forgot password?"
2. Fill in your email address and click send
   - You will now receive an email where you will be able to choose a new password and then log in

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Roles

Super admin
- Can use the web.

Has access to add or remove users, can also be a planner for users. Available for organisations only.

User
- Can use the web and the app

Can log in to the app and the web. The user can always access all information in their own account and add or remove planners.

Planner
- Can use the web and the app

Admin - Can plan and add/remove other planners.

Planner - Unable to add/remove other planners, it is also possible to limit which parts the planner has access to.
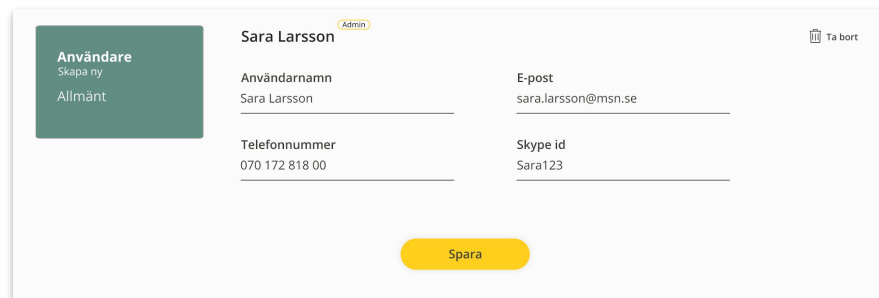
Add/remove users

Create user

1. Log in as superadmin
2. Click on "Create new user"
3. Fill in:
   - User name
   - User email
   - Password (this is not a requirement, if you do not enter a password for the user, then they themselves can choose a password via the email sent when saving the information)
   - Phone number (not a requirement)
   - Skype ID (not a requirement)
   - Language
   - If you want to be a planner for the user (it is possible to add planners even afterwards)
   - If the account is to be prepared with some sample data
4. Click on "Save"

The user should now appear in the list and receive an email to have a Wellbee account.

Remove user

Note that when a user is deleted, all data is deleted and it is not possible to recover the account.

1. Log in as superadmin.
2. Click the user you want to delete.
3. Click on "delete user"
4. Enter your own password to confirm.
5. The user has been deleted and has received an email that their account has been deleted.

Användare
Skapa ny
Allmänt

Sara Larsson Admin   🗑 Ta bort

Användarnamn   E-post
Sara Larsson   sara.larsson@msn.se

Telefonnummer   Skype id
070 172 818 00   Sara123

Spara

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Add/remove planner

Add planner

Planners can add add-ons from different logins and modes. As a superadmin, as a user and admin planner for a user.

1. Go to Settings > Planner
2. Fill in:
   - E-mail
   - Choose which access the new planner should have. See "Roles" for more information on differences between planner rights
   - Click on "Save"

The user should now be visible in the list and received an email that he has added as a planner for a user in Wellbee and may choose a password. A planner can be a planner for several users where it has different rights for different users.

Remove planner

1. Log in as superadmin, user or planner
2. Go to Settings > Planner
3. Click the X next to the planner you want to delete and confirm in the box that appears
4. The planner is now removed

Overview

The calendar is displayed by default for the entire week. It is also possible to change to day or month view by selecting that option to the right above the calendar.

Planning for a user is done as a planner from the web interface. As a user, it can be done directly from the app (if that option is activated in app settings) for the user.

Activities

The overview view shows activities with the color coordination they may have been assigned. At the bottom of the page is the explanation of what each color symbolizes. You can adjust under Settings > Color coordination.

A padlock 🔒 means that only the user himself (If the user created the activity) or the user and the planner (If the planner created the activity) can see the information. For other planners, the time seems busy but not visible by what.

To print a calendar, click on "Print".

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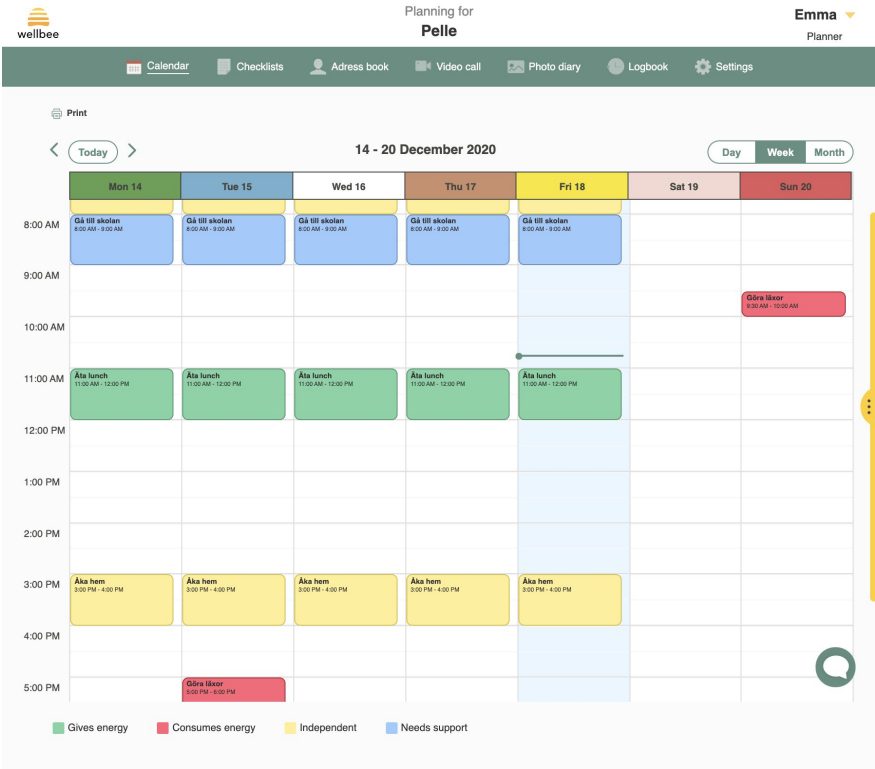
Create new activity

Adding a new activity to the calendar is done by clicking on the day and time where the activity will be located. This opens the view to create the activity where different choices about the activity are possible to fill in.

Title: The text entered here is the one that is visible in the calendar
Date/from/to: The date and time the activity takes place
Picture / video / sound: Upload new picture/video/sound or select from the Wellbee media library
Reminder: Time when notice is sent, possible to select more options.
Description: Text that appears on the activity when opened.
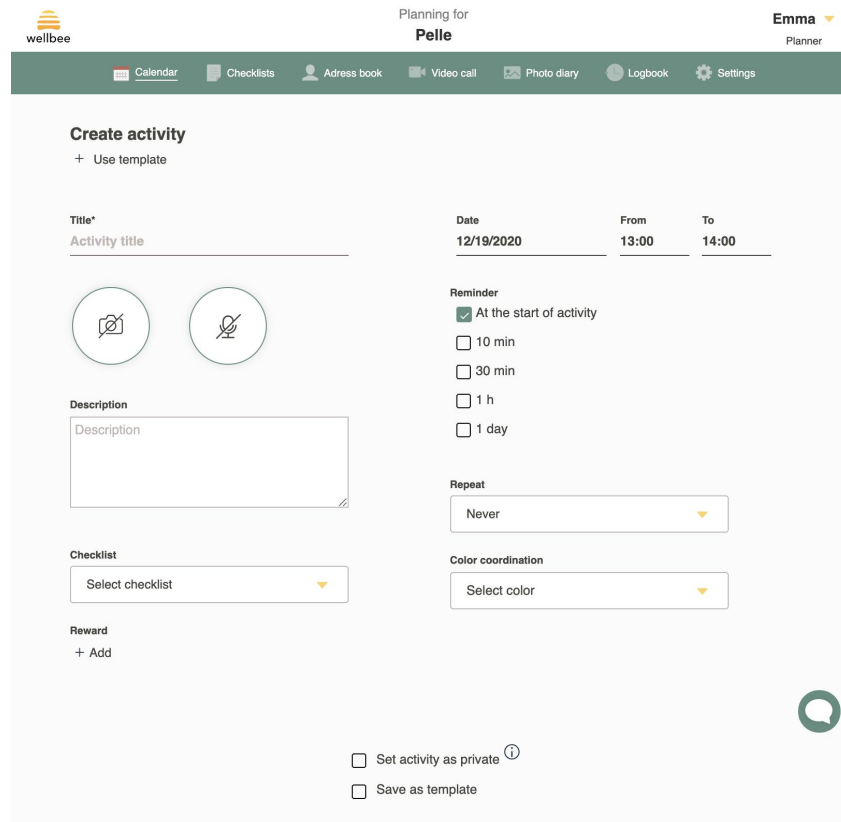**Repeated**: Create an activity that recurs ex. Mon-Fri.
Checklist: Link a checklist displayed in the activity. The checklist needs to have been created before.
Color coordination: In what color and meaning the activity should be displayed.
Reward: If added, text + possible sound is displayed when the activity is marked as finished in the app.
Make private: Only visible to the planner who creates the activity plus the user.
Save as template: Saves the activity as a template for reuse at another time.

wellbee

Planning for
Pelle

Emma ▾
Planner

📅 Calendar   📋 Checklists   👤 Adress book   🎥 Video call   🖼 Photo diary   ⬤ Logbook   ⚙ Settings

Create activity
+ Use template

Title*
Activity title

Date
12/19/2020

From
13:00

To
14:00

Reminder
☑ At the start of activity
☐ 10 min
☐ 30 min
☐ 1 h
☐ 1 day

Description
Description

Repeat
Never ▾

Checklist
Select checklist ▾

Color coordination
Select color ▾

Reward
+ Add

☐ Set activity as private ⓘ
☐ Save as template

Create activity from template

To create an activity from a template, previous activities must be saved as a template. The templates are then in a list on the right. To open the template view, click on the yellow selection on the right. A list of all templates is then displayed. To add an activity from the template list, hold down the mouse button and drag to the desired location in the calendar. It is then possible to edit the activity if necessary.

Edit activity

To edit an activity, click on the activity in the calendar. First, a view is displayed where it is possible to make certain changes. To open the view with all fields, click on "More settings".
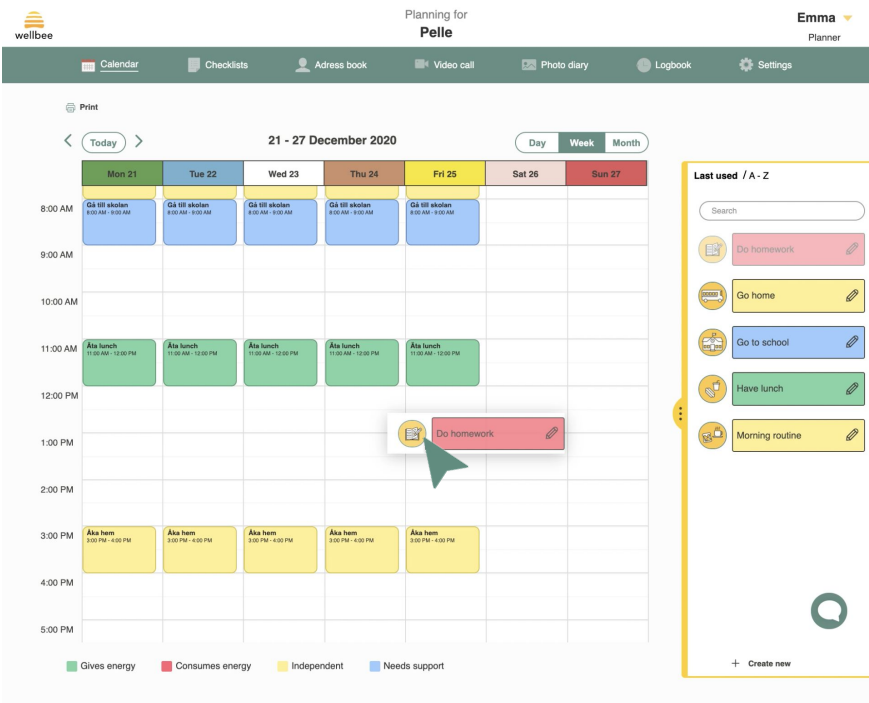
Different types and share checklist

There are two types of checklists, shopping lists where items including price can be added. As well as activity planning that can be used to show step by step how an activity is performed. To create a completely new list, click on "create new" for the variant to be created.

Shopping lists

To create a new item, fill in the name of the item and any image, sound and price. The item will then also be saved in the template list on the right. To use an item from the template list in the shopping list, you can click on the arrow next to the name of the item. Alternatively, use drag and drop to place it in the correct place in the list. Correct information for already created items in the list is done by clicking on the pen icon.

Activity planning

To add a new step, fill in the text as well as the image and any sound. To add another line, click the plus sign button. It is also possible to add clothes according to the weather as a function directly in the list. Then click on "Add clothes according to weather". The function will then be placed in the list and automatically based on the weather data show the image that is linked.

Shared checklists

Within an organization or family with multiple user accounts, it is possible to share checklists to enable another user to use the same. Go to the checklist you want to share. Check the "Share checklist" option and save. The checklist will now be visible and possible to use for all users within the organization / family by clicking on shared lists under the menu option Checklists.


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Address book

Under Address book, the contacts that should be available for the user to access from the functions "Contacts" are collected in the app. Not to be confused with the people who, for example, can be called with video calls (these need to be set up as planners, read more here).

To add a new contact, click "Add new". Fill in the name of the contact and any picture and sound. The information that is then filled in around the phone number, e-mail and skype ID determines whether the information will be visible in the app or not. If no e-mail is filled in, that option will, for example, be hidden in the app. It is also possible to check in/out if it should be possible to call or text the contact.

To add self as contact, click on "Add myself". The page "Create contact" will then show with prefilled information.

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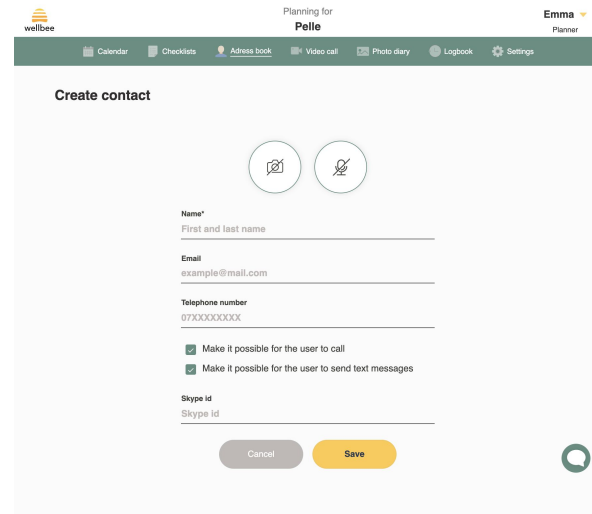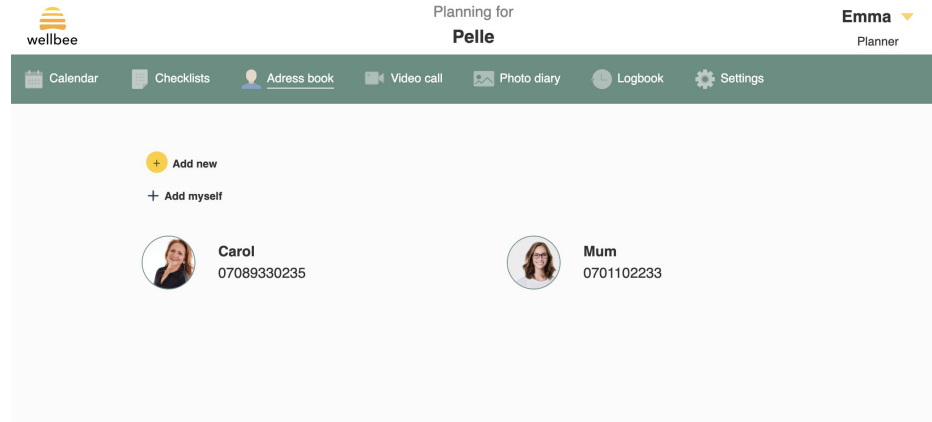
Clothes

Using the functionality Clothes, the user can see which type of clothes that's suitable to wear at the moment. Depending on the current weather an image is shown together with current temperature. It's possible to switch to your own images.

To change which images are shown in the app, go to Settings > Clothes according. Click on "Change image". You can select to either upload your own image or choose from the existing image library.


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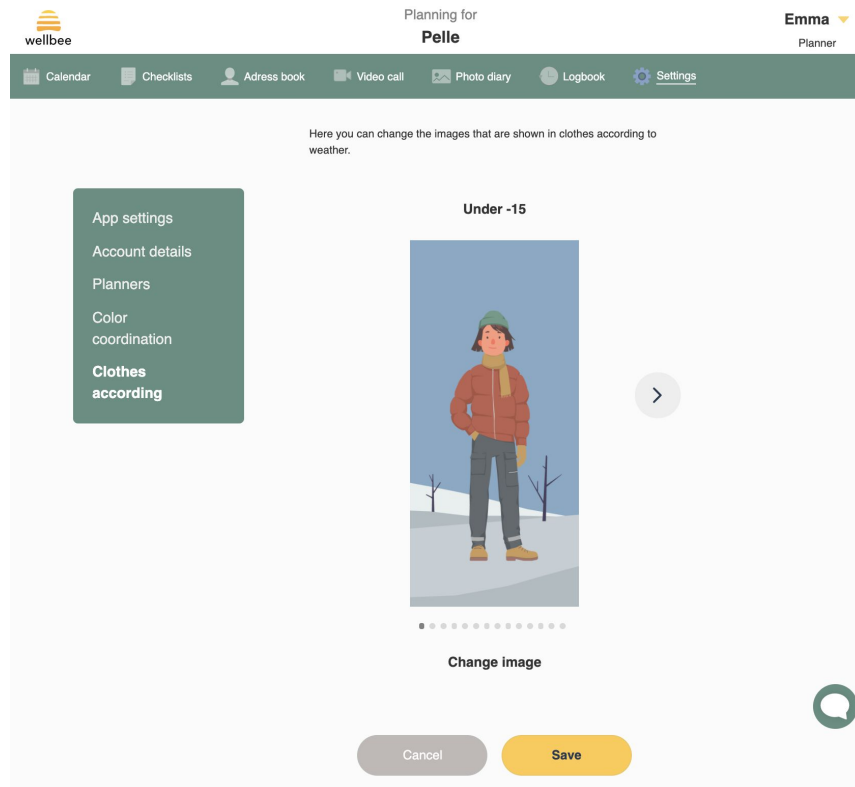
Video

To be able to use the function video, functionality must be turned on under app settings. For a person to be able to make video calls, it must be organized as a planner. It is also possible to only choose that the person should have access to video calls, this is done on the respective planner by checking the video option.

Call from the planner web

Click on video in the menu (If the option does not exist, the rights need to be added by an admin planner or turned on under app settings). Then select the person to be contacted by clicking on the box with the name.

It is possible to call to/from the web interface and the app for both planners and users. In this case, planners can also log in to the app with their login details.
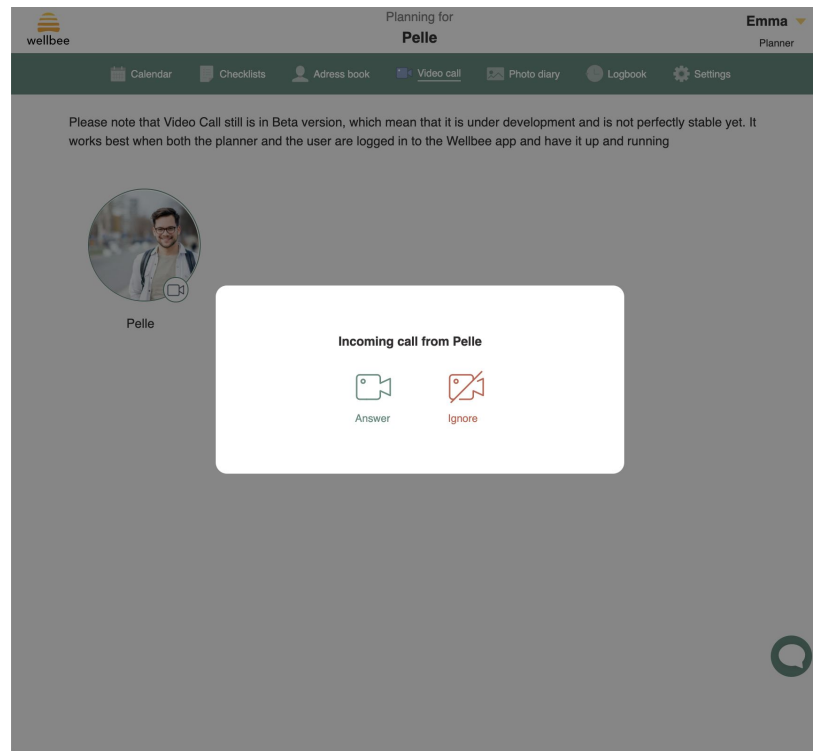
Logbook

To be able to use the functionality Logbook it needs to be turned on in Settings > App settings > App functions.

The logbook shows previous events between users and planners:

- Video calls
- Messages
- Finished activities
- New posts in the photo diary
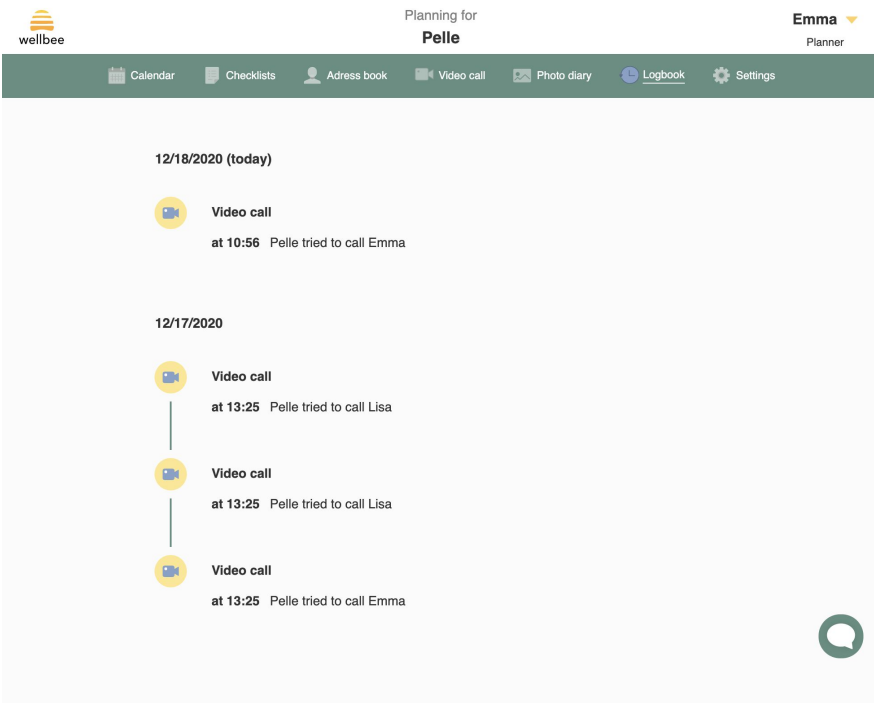
Events are shown for the previous 24 hours.

Photo diary

It is possible to upload images both as a planner and user, at the moment it is only possible to do from the app. All uploaded images will be visible to the user as well as to the planners who have the right to view the photo album.

From the app

Click the plus sign and choose to either take a new picture or select one that is already saved on the device. It is also possible to add a description to the image. Click save and the image will now be visible in the photo album.

Click on one of the pictures to see it enlarged and read the description.

At this time, it is unfortunately not possible to delete an added image.
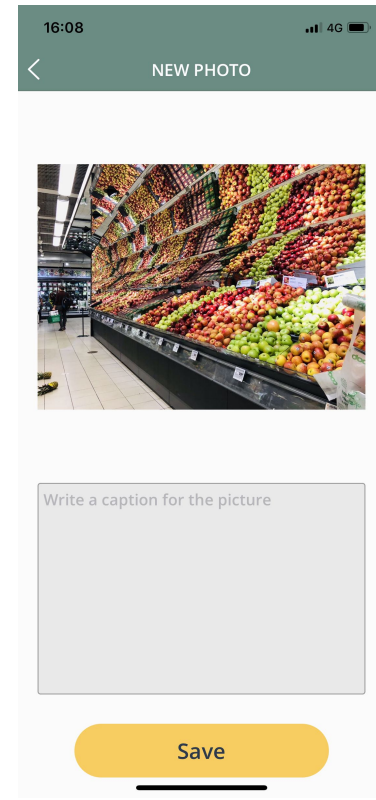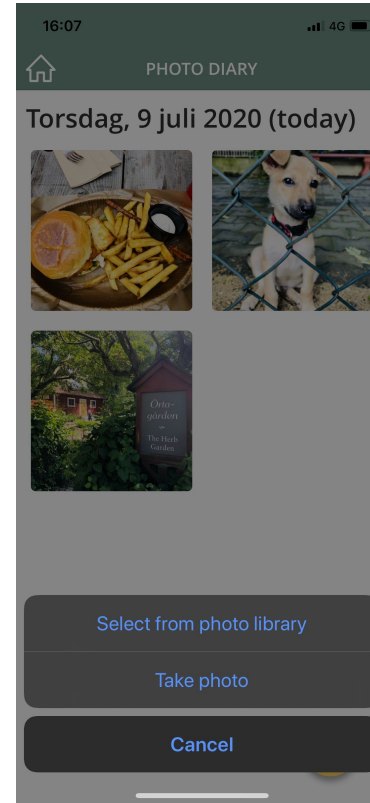
Messages

To be able to use messages it needs to be turned on in Settings > App settings > App functions.

As a user it's possible to add several planners as receivers when sending a message. Each planner can only see the messages sent to them.
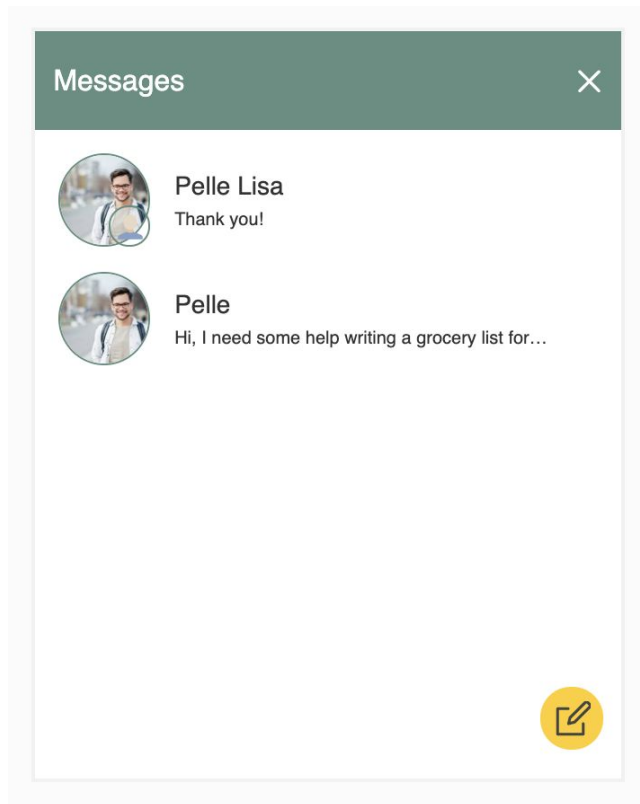
Settings

App functions
Activate or deactivate functions that should be visible / hidden in the app by clicking on the button on the respective line. New features that are launched are always hidden from the user. Therefore, there must be an active choice to enable features to make it visible to the user.

Calendar
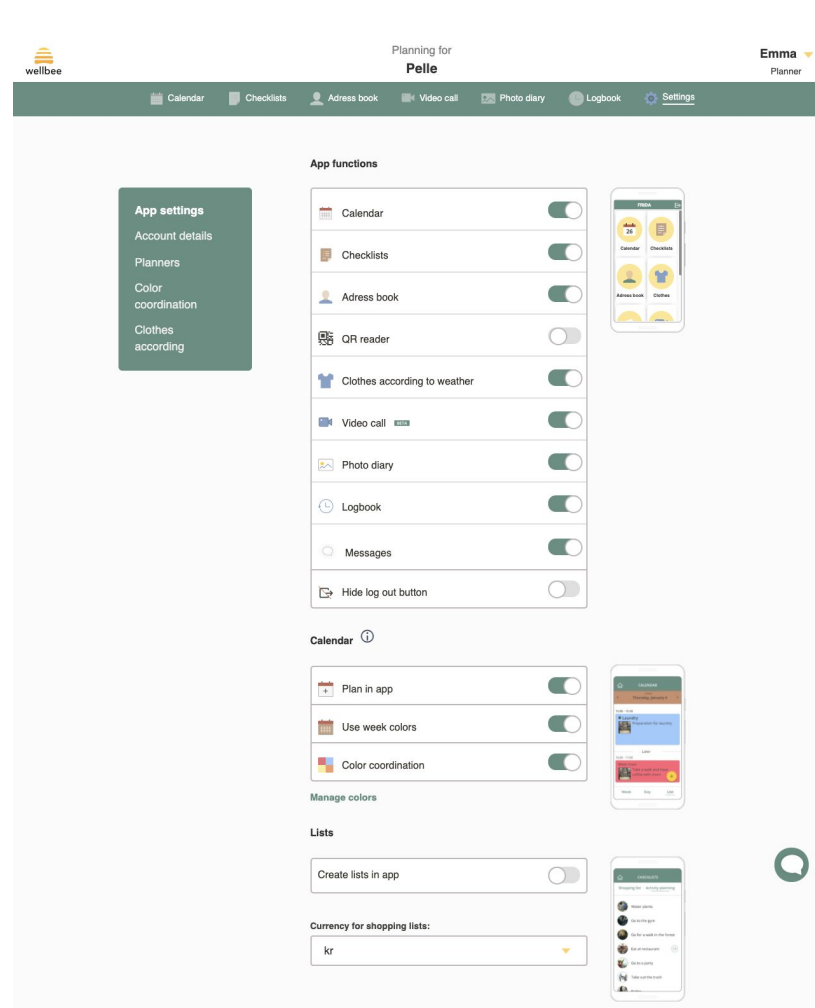Ability to adjust specific functions in the calendar in the app.

Lists
If possible, choose to create lists in the app or not.

Currency for shopping lists
Choose which currency to use SEK or euros.

Clock
Select the type of timer to use. Also possible to turn off completely.

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Subscription

Change payment details
To change which payment card the payment is to be deducted from is done by clicking on the name in the upper right corner, select profile and under Subscription -> Card information. Click enter payment and then change.

Download receipt
It is possible to download receipts for all the draws made on the card. They are available for download under Subscription History, which can be found under Subscriptions.

Cancel subscription
To cancel a subscription is done by going to Subscription and selecting cancel license. The account will then be closed after the current payment period.

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Profile settings

These settings can be accessed by clicking on the name in the upper right corner, a menu option is then displayed with "Profile". To return to the planning view, click on the cross at the top right.

Profile
Here you can see the information that belongs to the person who is logged in. It is possible to update all information except the email address. For example, you can add a photo.

Change password
Possibility to change the password for the account that is logged in. Enter the current password and the new password you want.

Language
The setting here controls which language the web interface should display. Available languages are: Swedish, English, Spanish and German.

wellbee

Planning for
Pelle

Emma ▼
Planner

✕

Profile
Change password
Language
User data

Name*
Emma

Email*
emma+planerare@frost.se

Telephone number
07XXXXXXXX

Skype id
Enter skype id

Save

Delete account

🗑 DELETE ACCOUNT

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Web site:

www.wellbee.app

Support questions:

support@wellbee.app

Other questions and contact:

hello@wellbee.app