

Universal Remote Information Management

Management Panel User Guide



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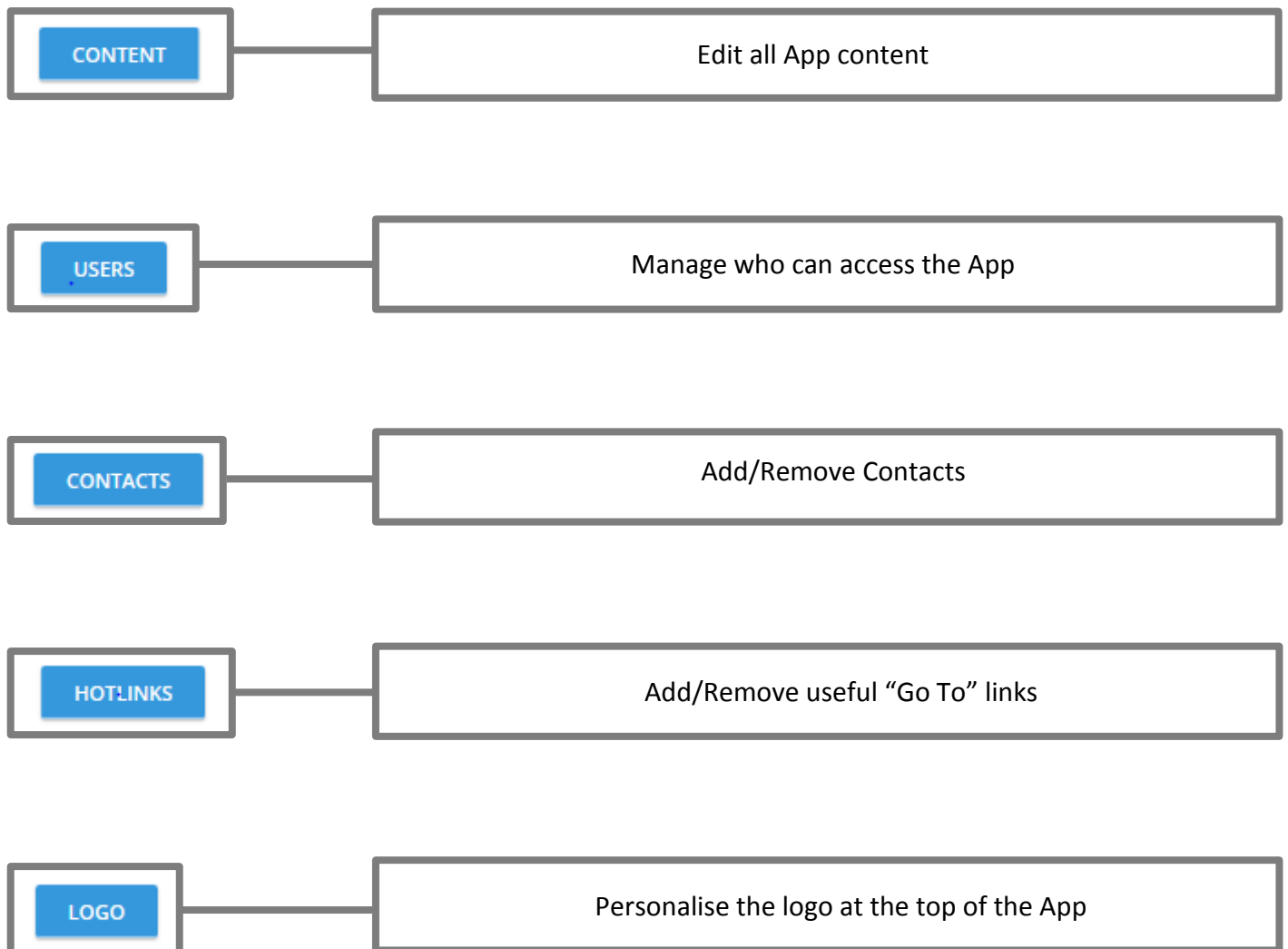
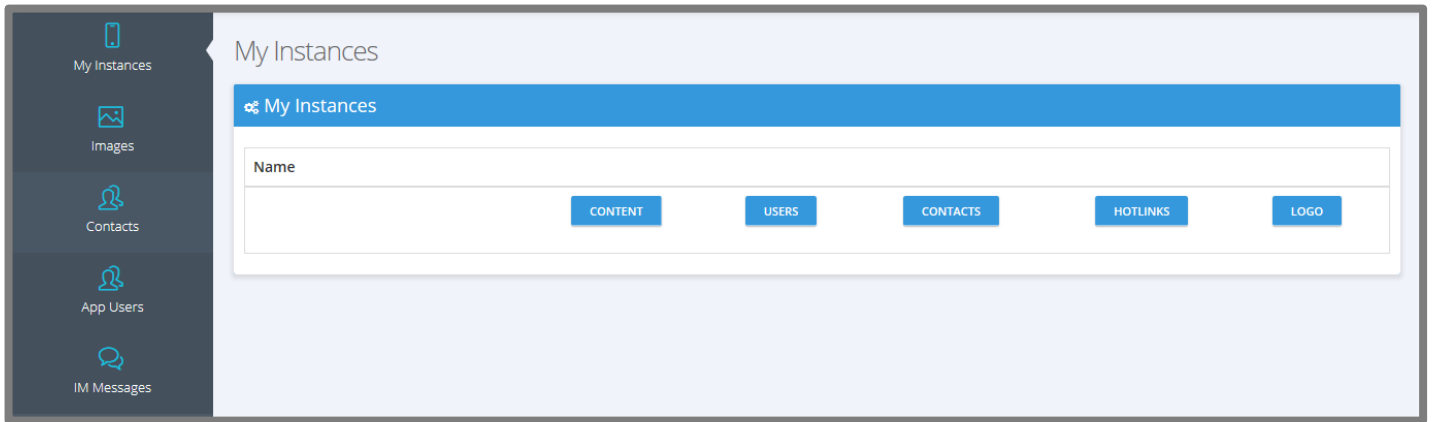
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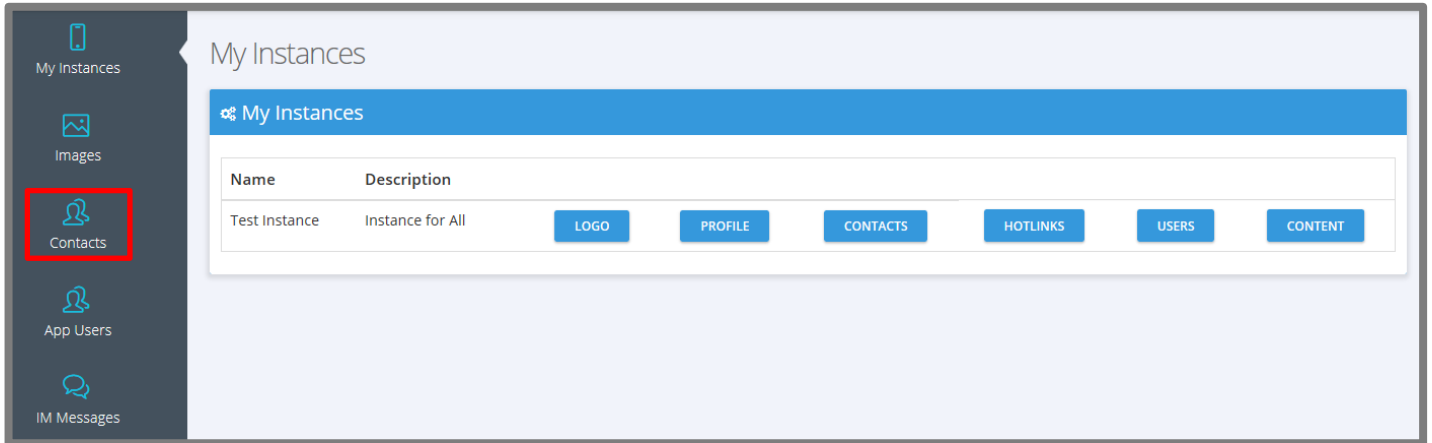
Navigating the main screen





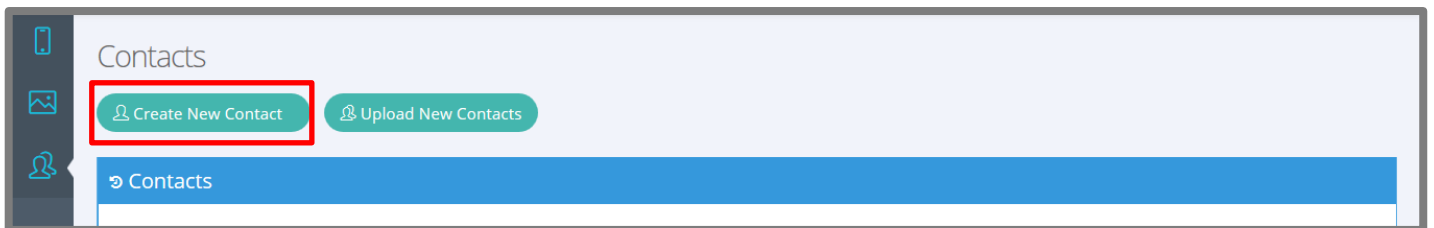
How to Add/Remove a contact

- Click onto the “Contacts” Tab on the left-hand side

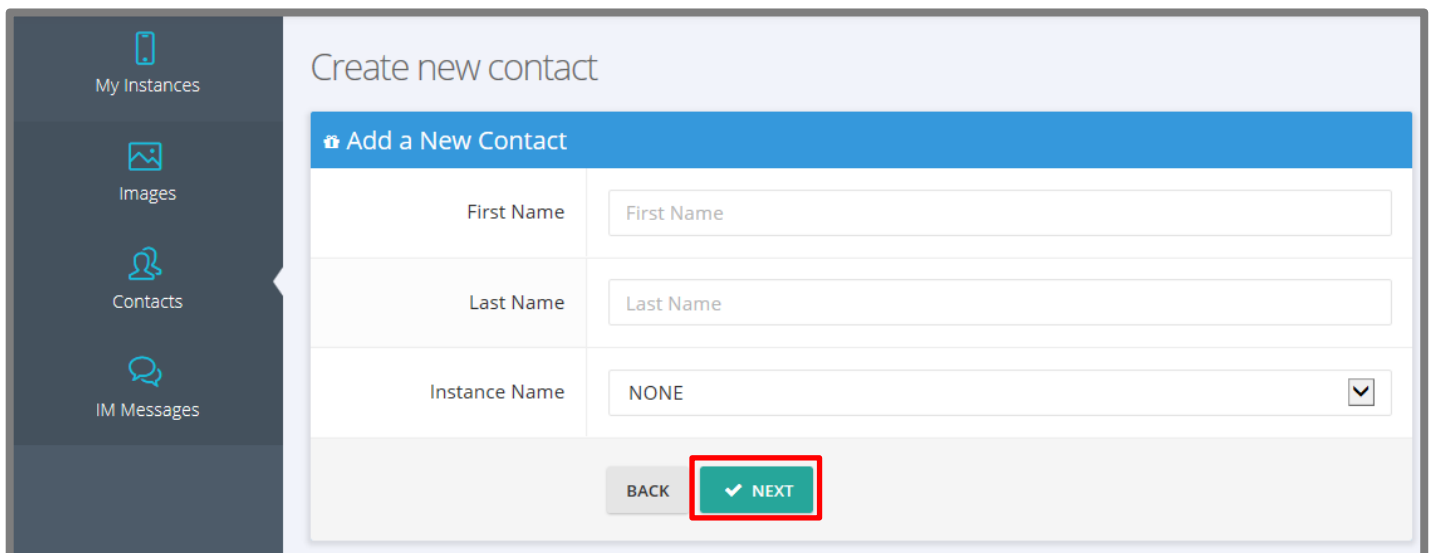


To add a new contact

- Click “Create New Contact”



- Fill in relevant contact information
- Select Instance Name
- Select “Next”





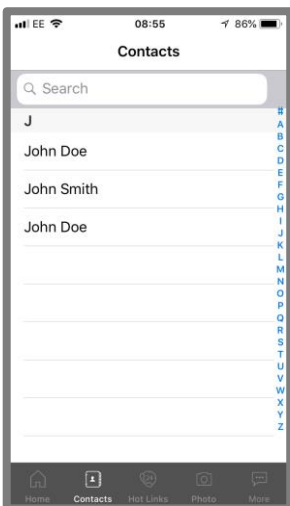
- Fill in contact details – phone number etc
- Select “Add”

➔ Add New Contact Information

Title	Company
Value	+447897896789
Type	PHONE (click to open dialpac)

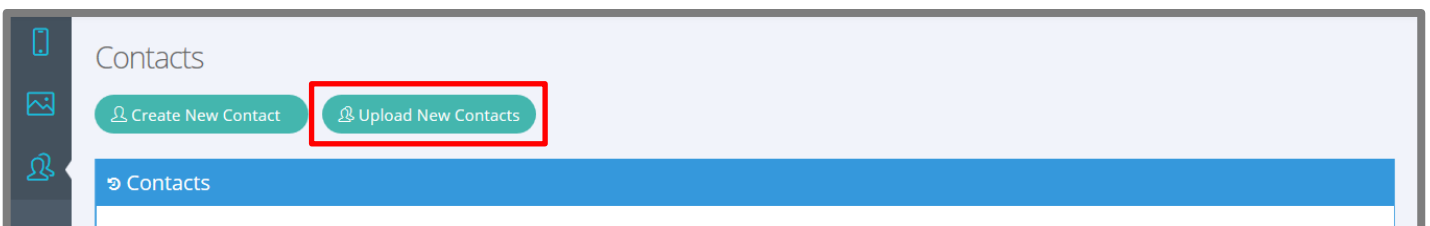
✓ ADD BACK

- The contact details have now been added to the App and will appear immediately



To upload more than one contact

- Select “Upload New Contacts”



- Select “Click here” which will ask you to download a excel file
- To upload contacts in mass, you will need to populate the template provided
- Once this is complete, upload the excel sheet and your contacts will be automatically uploaded



Contacts

Upload New Contacts

Please select either .csv or .txt file only. [Click here](#) to download a template file.

This file has column headers

Delimiter: Comma

File: Browse...

BACK

To remove a contact

- Click “Contacts” on the left-hand side as you would to add a contact
- Select the contact you wish to delete
- Click “Delete Selected Users”

Available Instances

Keyword

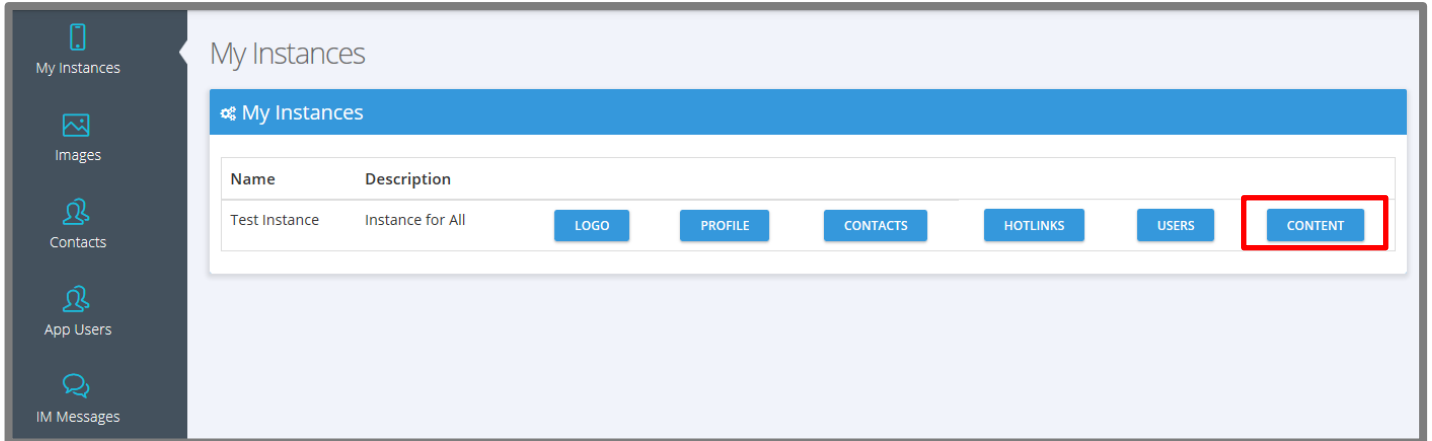
20
Display number of records per page

	Name	Number
<input type="checkbox"/>	John Smith	Company: Smith Inc. Mobile: 07111222333
<input type="checkbox"/>	John Doe	Home: 02071234567
<input checked="" type="checkbox"/>	John Doe	



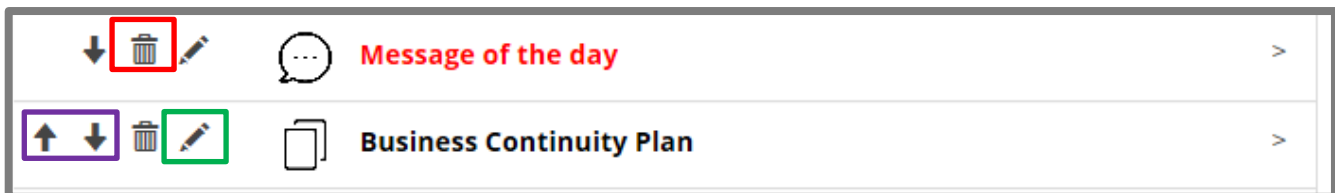
How to edit app content

- Select “Content” on the main home screen



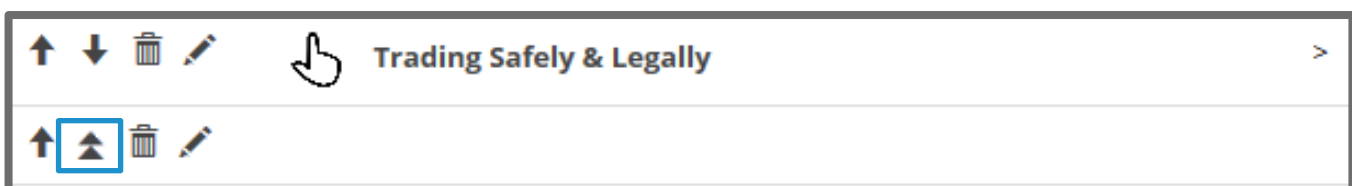
To edit main contents list:

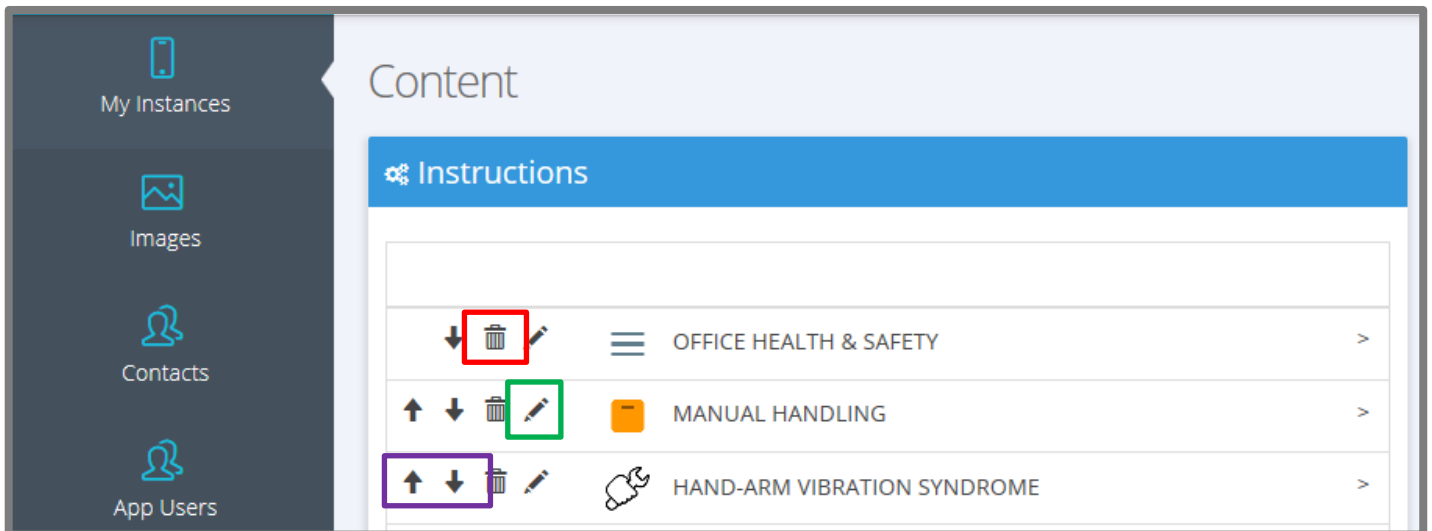
- To **delete** ALL contents of tab click the trash can – this will delete the tab and everything within the tab
- To **edit** the tab name click the pencil
- To **change the order** of where the tab sits in the list, use the arrows



To edit any content within a tab:

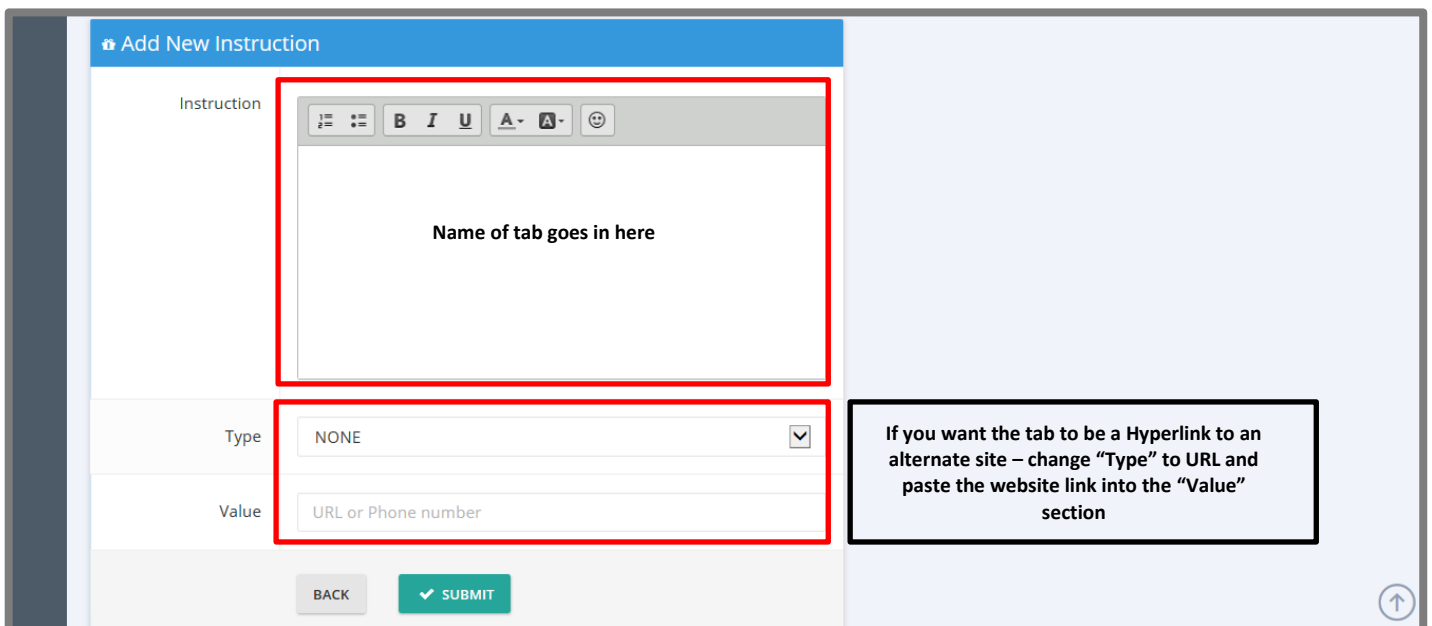
- To **delete** ALL contents of tab, click the trash can – this will delete the tab and everything within the tab
- To **edit** the tab name, click the pencil
- To **change the order** of where the tab sits in the list, use the arrows
- If a **fast-forward** arrow appears, it will move the last line in the list to the top of the list
- Once you have made any alterations within the tab, press **submit**





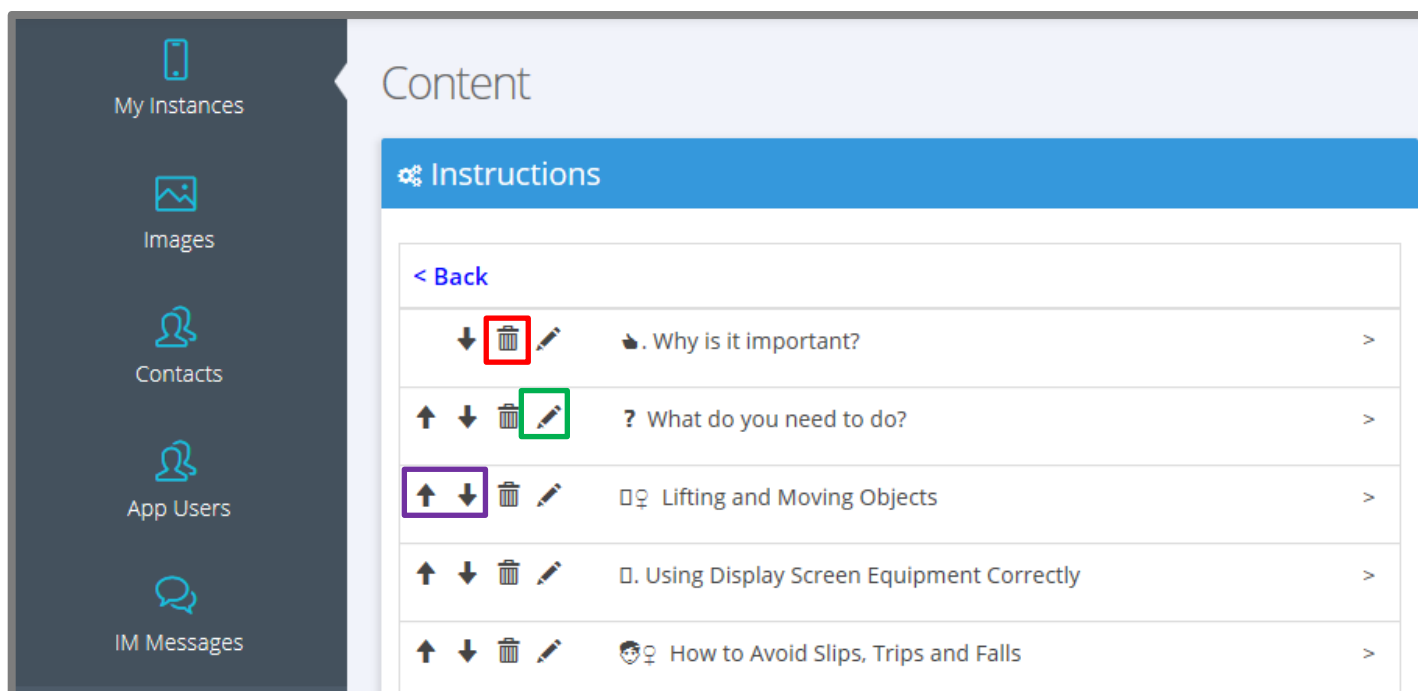
To add a new tab

- Add New Instruction and select “Submit”



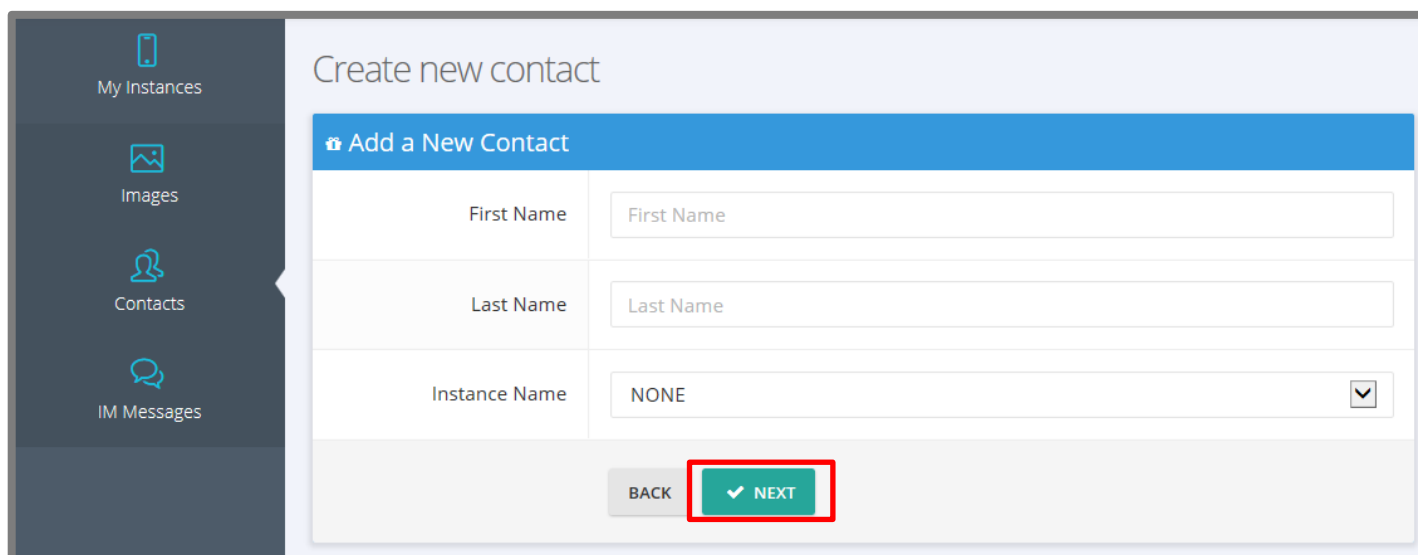
To edit content within a tab – click on the tab use the same process for editing

- To **delete** ALL contents of tab, click the trash can – this will delete the tab and everything within the tab
- To **edit** the tab name, click the pencil
- To **change the order** of where the tab sits in the list, use the arrows
- Once you have made any alterations within the tab, press **submit**



To add a Hotlink

- Add a new contact using the “How to add contact guide” above
- Fill in information for the contact/link you want to add
- Click “Next”



- Next change type to “URL”
- Paste link into the “Value” section
- Select “Add”



➤ Add New Contact Information

Title	Company ▾
Value	ADD LINK HERE ✕
Type	URL (click to open Safari) ▾

✓ ADD BACK

Title	Value
No Record Found	

- Go back onto home screen
- Select “Hotlinks”
- The new link should appear in the first column “Contacts”
- Click the link and it will appear in the second column

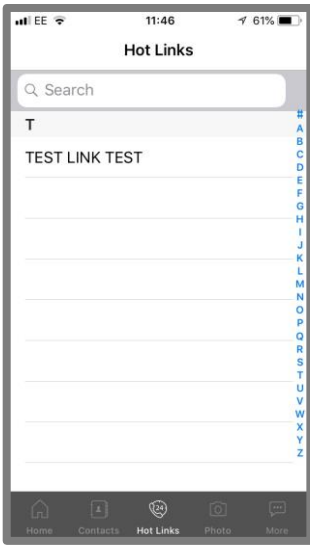
➤ Add/Remove hotlinks from instance

Contacts	Hotlinks Lister
John Doe John Frost John Smith	TEST LINK TEST

Successfully Added

* Click a contact to add or remove from the instance.

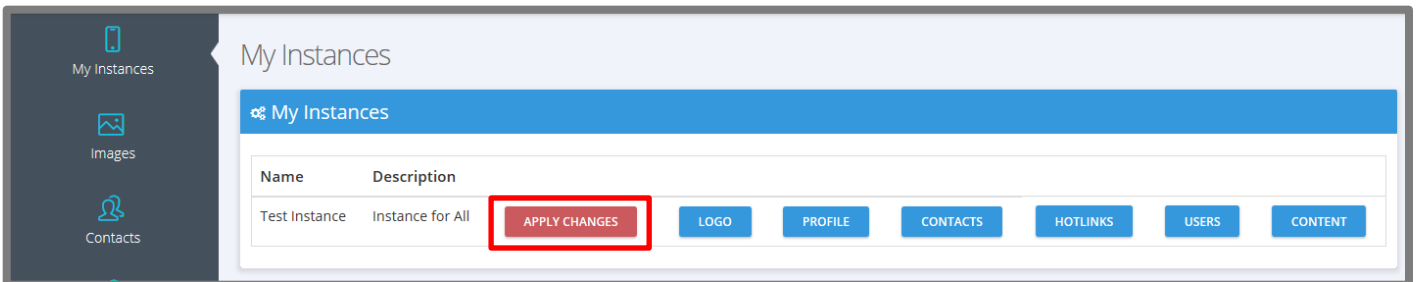
- The contact details have now been added to the app and will appear immediately



IMPORTANT

When all editing is completed – to save all changes

- Go back to main screen
- Click “Apply Changes”





Initiating an Instant Message

Note: Instant messages can only be initiated via the management panel.

- Select “IM Messages” & “Create new message”

IM Messages

CREATE NEW MESSAGE

IM Messages

28/09/2019 to 28/09/2019

Select date range

Keyword SEARCH CLEAR

20

Display number of records per page

Date/Time (Sent)	Groups	Title	Message	Sent To	Received By	Read By	Acknowledged By
No Results Found							

To select a recipient or multiple recipients

- Type the user name into the keyword box and press “Search”
- Alternatively, your contacts will appear in the box below and you can select all, or whoever you want to send a message to

Create New Message

Select Recipients (Step 1/2)

Keyword SEARCH CLEAR

Contains Exact Begins with Ends with

20

Display number of records per page

GROUPS VIEW

<input type="checkbox"/>	First Name	Last Name	Email
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Type Message (Step 2/2)

Title Type title here ...

Message Type a message here...

Schedule Send N

BACK SUBMIT



To create a message

- Type the title of the message – this is the title your recipients will see
- Type the content of the message
- You can either initiate the message immediately, or schedule the message to be sent at a later date

- Once the message has been sent you will be directed to a processing page where you can track the status of the message

Date/Time (Sent)	Groups	Title	Message	Sent To	Received By	Read By	Acknowledged By
2019-09-28 11:46:06 PROCESSING		test	test 1	1	0	0	0

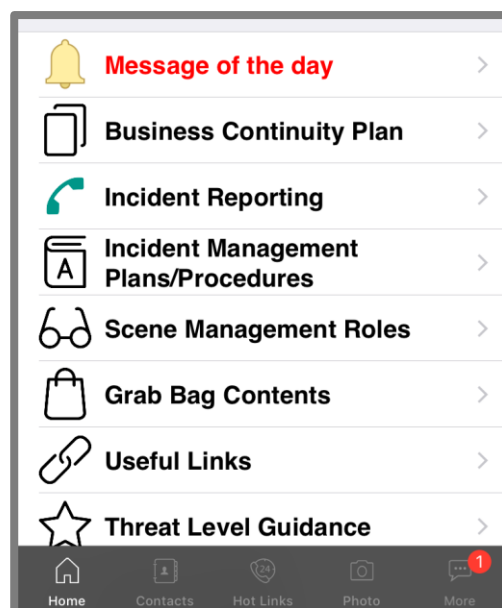


- Refresh the page & the processing page will update

Date/Time (Sent)	Groups	Title	Message	Sent To	Received By	Read By	Acknowledged By
2019-09-28 11:46:06 SENT		test	test 1	1	0	0	0

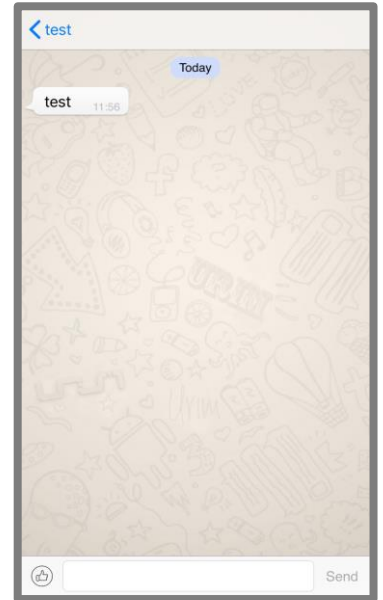
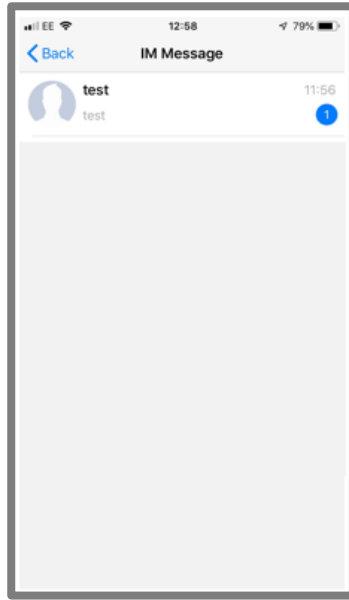
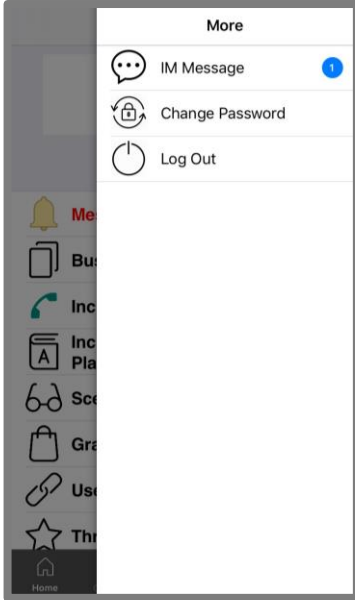
How the user will receive the message

- User will receive a notification on their phone main screen
- An alert will show on their App
- An alert will also show once the App is open





- When the message has been received the user can respond to the message for two-way dialogue



- To track who you have sent the message to, click the message title

IM Messages

CREATE NEW MESSAGE

New message has been created and sent.

IM Messages

28/07/2019 to 28/09/2019

Select date range

Keyword SEARCH CLEAR

20

Display number of records per page

Date/Time (Sent)	Groups	Title	Message	Sent To	Received By	Read By	Acknowledged By
2019-09-28 11:46:06 PROCESSING		test	test 1	1	0	0	0



- You can then track your recipients and status of the message

The screenshot shows the 'IM Messages' interface. On the left is a sidebar with navigation options: My Instances, Images, Contacts, App Users, and IM Messages. The main content area is titled 'IM Messages' and contains two sections: 'IM Message Statistics' and 'IM Message Recipients'. The 'IM Message Statistics' section features a table with the following data:

Date/Time (Sent)	Groups	Title	Message	Sent To	Received By	Read By	Acknowledged By
2019-09-28 11:55:10		test	test	1	1	1	0

Below the statistics is a '< Back' button. The 'IM Message Recipients' section includes a dropdown menu set to 'All', a search filter, a keyword search box, and a 'Display number of records per page' dropdown set to '20'. Below this is a table with the following data:

Name	Sent	Received	Read	Acknowledged
	2019-09-28 11:55:10	2019-09-28 11:56:36	2019-09-28 11:58:21	

To send a message to a designated group

- Firstly, create a group
- Select "App Users"
- Select "Group Management"

The screenshot shows the 'App Users' interface. On the left sidebar, 'App Users' is highlighted with a red box. The main content area has three buttons: 'Create New User', 'Upload New Users', and 'Group Management', with 'Group Management' highlighted by a red box. Below the buttons is a section titled 'App Users' with a dropdown menu set to 'None selected', a search filter, a keyword search box, and a 'Display number of records per page' dropdown set to '20'.

- Create a Group Name & submit

The screenshot shows the 'Create a New Group' form. The left sidebar has 'App Users' and 'IM Messages' visible. The main content area has a title 'Create a New Group' and a form with a 'Group Name' label and a text input field containing the placeholder text 'Enter new group name'. Below the input field are two buttons: 'BACK' and 'SUBMIT'.



- The group will now appear under “Groups”

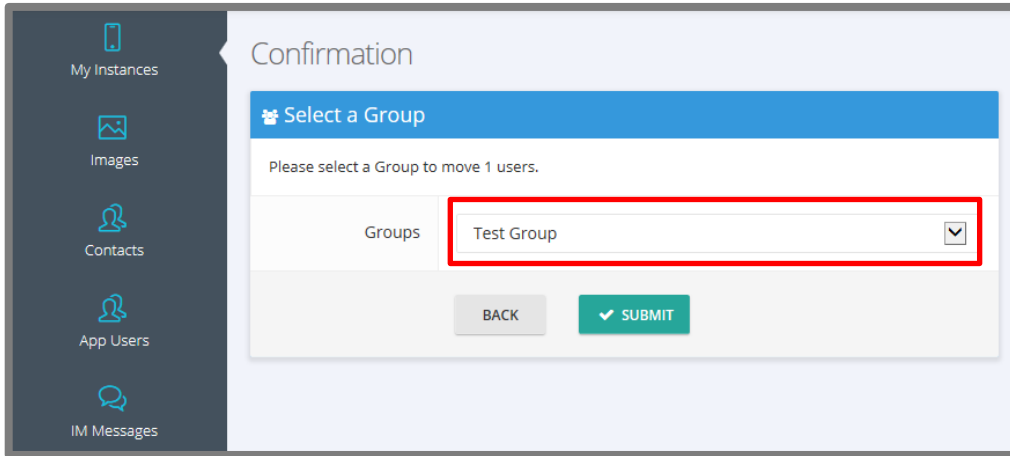
	Name	Users in this Group
	Test Group	0

To add a user to a group

- Select “App Users”
- Any App Users you have previously entered will appear below
- Select the users you wish to add to a group
- Select “Move to a Group”

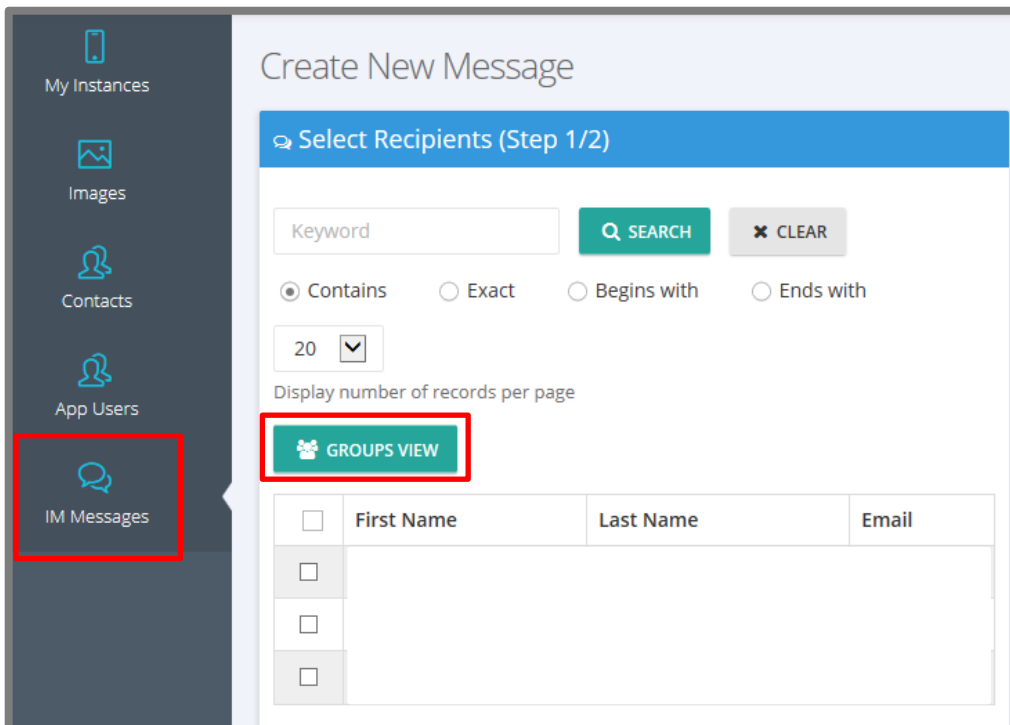
<input type="checkbox"/>	Name	Email	Last Logon Time	App Version	Status	Instance
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

- Select the Group you want to add and press submit



To send an IM message to a group

- Go back to "IM Messages"
- Select "Groups View"





- Select the Group you wish to send a message to
- You are now ready to populate the message content and send

My Instances

Images

Contacts

App Users

IM Messages

Create New Message

Select Recipients (Step 1/2)

Keyword

Contains Exact Begins with Ends with

20
Display number of records per page

<input type="checkbox"/>	Group Name	Users in this Group
<input checked="" type="checkbox"/>	Test Group	1