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Get Started

Customize Branding

Connect Plus+ lets you brand your organization in several ways. Giving you the opportunity to match your Member's communication platform to your branding on your website and other materials to keep branding consistent. You may even want to update branding to include your branding and while representing holidays or events.

- ○ To customize your branding on the Dashboard, make sure you are on the Dashboard, then click on the Gear in the upper right hand corner
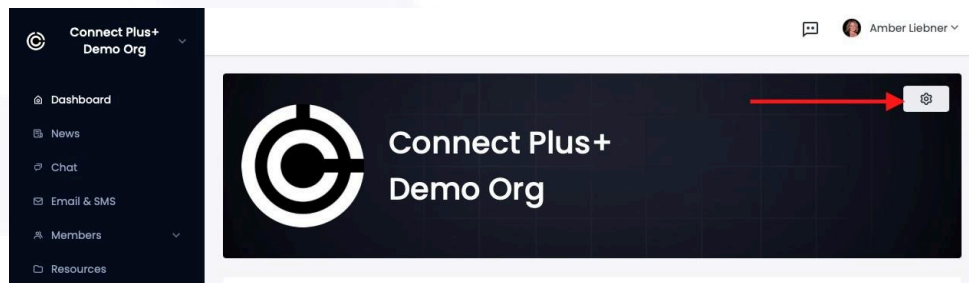
- ○ **Rename Organization**
  - ■ After clicking on the gear select the option to "Rename Organization"
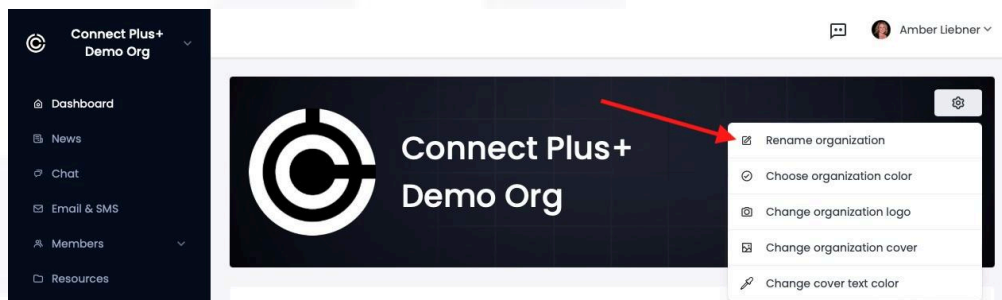
- A pop up box will appear
- This pop up box has a text box where you can change or edit the name of your organization
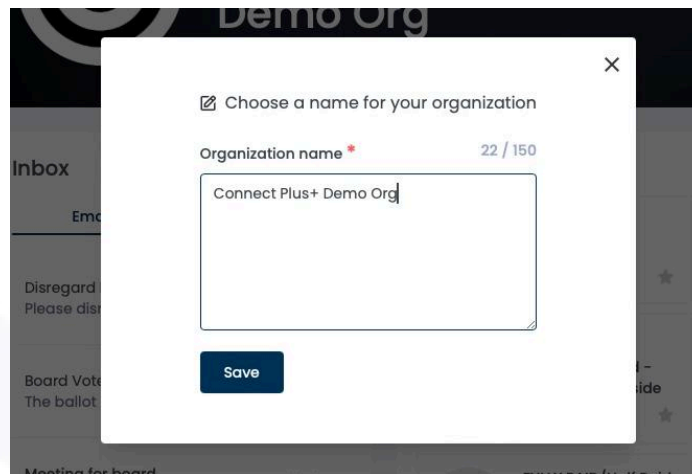
- Edit or change the name of org that is displaying on the dashboard then hit "SAVE"

○ **Choose Organization Color**

The organization color is the color of all accents in the website. This will include all buttons, accents and colored sections throughout the website.

- ■ Here you can change the color of all the accents in Connect Plus+ by selecting one of the color options shown.
- ■ Select the "Save and Finish" Button

- ○ **Change Organization logo**
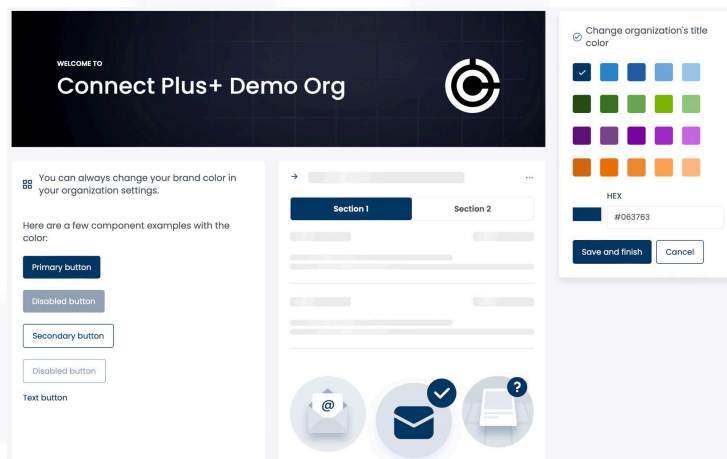 - ■ Recommended for the logo to be 160x160 pixels
  - ■ After selecting "Change Organization Logo" you see a pop up window
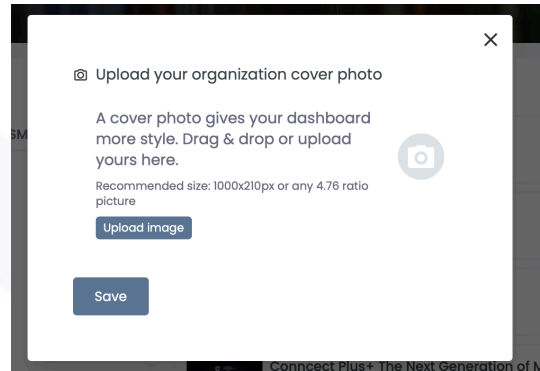
  - ■ Select "upload image" button
  - ■ Search your computer or mobile device for image
  - ■ Select image
  - ■ Press "upload" button to upload the image
  - ■ IF you selected the wrong image click "reset" button
  - ■ Once you have the correct image move the crop box to crop the image to fit the box
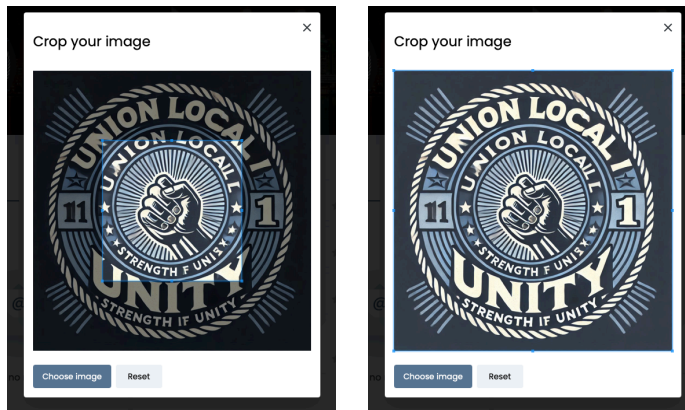
- ■ Select "Choose Image"
- ■ Select Save

- ○ **Change Organization Cover**
  - ■ No image is needed, a color can be used
  - ■ Cover image should be 1000x210px
  - ■ Select "Change Organization Cover"
  - ■ A pop up window will appear
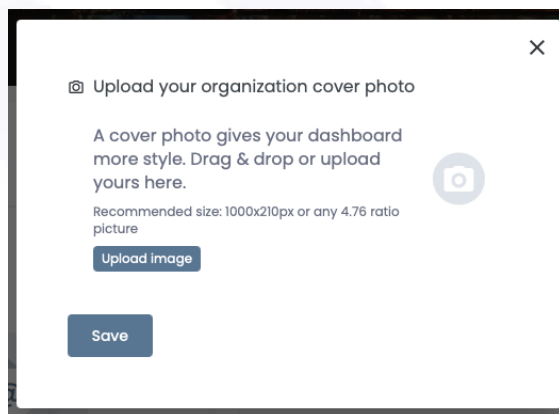
  - ■ Select "Upload image"
  - ■ Search for the image you would like to upload
  - ■ Select image
  - ■ Press "upload" button to upload the image
  - ■ Crop the image with the crop box

- ■ Select button "Choose Image"
- ■ Select the Save button

Dashboard

Description: The dashboard is a collection of important information to help make sure your members stay up to date with all current information.

- An Admin can see everything
- A member will see only the information that an administrator has shared with them
- The "Inbox" will show each user a copy of the emails and SMS messages that an admin has sent to them
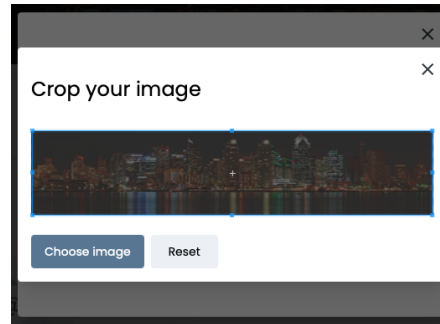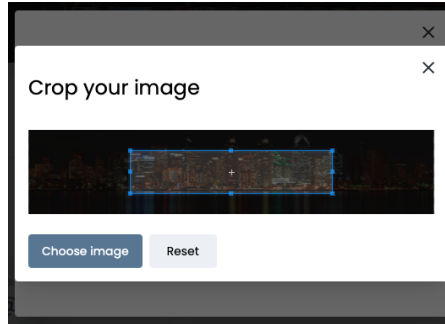- The "Resources" will show any resources that has been shared with that user (each user might see different Resources)
- The "News" section will show all news articles that have been shared with that user
- The "Chat" will show any chats that have been shared with that user. ***Note: Chat might be visible for your organization. This feature can be turned off or kept on, if you do not see a Chat section then this section has been turned off.*

News

Description: News is a great way to gather information that may be valuable to collect for your members' reference.

- Benefits of a Members News Post
  - Post a news article from a local news source that is useful for your members
  - Post news articles from state or national organizations you are affiliated with
  - Share any news that may not warrant an email
- Preparing graphics for your news article
  - Adding a Thumbnail and Article cover adds a visual to draw attention to the news. The chances are much higher to get people to read the article with images. It is highly recommended to add images to all Public News Articles.
  - Using Canva.com is a great tool to create these graphics.
    - **Create Article Thumbnail**
      - This image will be the image you will see on the news feed (see examples below)
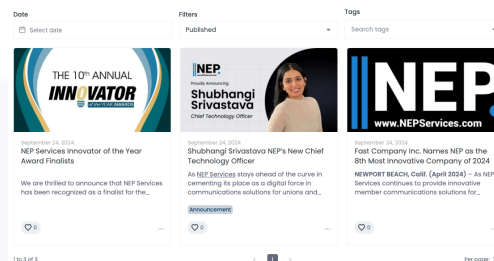
      - Image should be a landscape rectangle image
      - Recommended size: 300x160px or any 1.87 ratio picture

■ **Create Article Cover**

 ● This image will be the image that shows across the top of the article when you are reading it

 ● Image should be a long narrow rectangle image
 ● Recommended size: 1000x210px or any 4.76 ratio picture

● Create a News Article

 ○ On the left hand side click on the "News" section
 ○ Click the "Add News" button
 ○ Add Article Thumbnail & Cover (if desired)

 ○ Add the Title of your News Article
 ○ Type news article or

- ○ Paste news
    - ■ How to Paste
    - ■ Select the "Edit" option in menu above
    - ■ Select "Paste" to paste the content you pasted
    - ■ On a computer right click to paste
    - ■ Pop up menu shows, select paste
    - ■ Pop up window with the word paste shows
    - ■ Select the pop up word "Paste"
- ○ Add Tags
    - ■ Select from list of tags
    - ■ Type the word you want to add as a Tag, hit enter to create
- ○ Click on the "Next Button"
- ○ Who do you want to share this news with?
    - ■ Select specific members
    - ■ Select specific groups of members
    - ■ Note: you can select both individual people and Groups of people
    - ■ Select Publish to post the news article

- ● Schedule a post
    - ○ Follow the steps to Create a News article
    - ○ On the 2nd page of Creating a News article
    - ○ Select a Date
    - ○ Select a time
    - ○ Select Publish to post the news article

Text Editor: for Emails, Resource Pages and News

The text editor will appear when creating a News Article, when writing an Email and when creating Resource pages. **NOTE: If you have upgraded your email editor,*

these editor instructions will not apply for the editor in email, it will apply to resources and News.

- ○ **"Edit" drop down**
  - ■ Select Undo to undo your last step
  - ■ Select Redo to redo your last step
  - ■ Select "Cut" to cut out a section of content
  - ■ Select "Copy" to copy a section of content
  - ■ Select "Paste" to paste a section of content
  - ■ Select "Paste as text" to paste a section of content without pasting any of the formatting you copied
  - ■ Select all to select all content
  - ■ Select Find and replace to find a word in the text or to find a word and replace that word with a different word
- ○ **"Insert" drop down menu**
  - ■ Select Image
    - ● "Source" means the URL/weblink where the image is stored
    - ● "Alternative description" is used to add text and explain what is in the image incase someones device does not display the image
    - ● Width will allow you to edit the width of the image you've added
    - ● Height will allow you to edit the height of the image you've added
  - ■ Link
    - ● In the URL field add the website you want to include
    - ● "Text to display" is the text you want the link to be connected to

- Open Link in "New Tab" is auto selected and that will allow the link to open a new tab with the website you've added
  - "View" drop down menu
    - Selecting "Source Code" will let you view the content in the content box as code.
      - Do this if you feel comfortable using code to edit how the content looks.
  - "Format" drop down menu
    - Select Bold, Italic, Underline, or Strikethrough to format your text
    - Select Superscript is a character (such as a number or letter) that is set slightly above the normal line of type.
    - Select Subscript is a character (such as a number or letter) that is set slightly below the normal line of type.
    - Select Code if you are comfortable with writing code
    - Formats to select any of the following
      - Header
      - Inline options (i.e. bold, Italic, etc.)
      - Blocks (i.e. Paragraph, Blockquote, Div, or Pre)
      - Align your text
    - Blocks
      - Is another way to select different header options.
    - Fonts
      - Select from a selection of fonts
    - Font Sizes
      - Select your font size
    - Align
      - Align your text to be left justified, Right justified, Centered
    - Line Height
      - This is the space between each line of text.

- Text Color
  - Select the color of your text
- Background Color
  - Select a color to show behind the text
- Clear Formatting
  - This will clear any formatting you have set up
- Table
  - Insert a table to display information
  - Select how many rows and columns
- Tools
  - Source code can be used if you want to are comfortable with HTML code
  - Word Count will display how many words you have

Chat

Description: Chat is a feature that brings direct or group messaging to your fingertips allowing you to better engage with your members.

Note: Chat can be on for all members allowing all members to chat, OR on for only leadership in the organization and off for the rest of your members OR off completely. If you do not see Chat as a feature, reach out to your CSM or email csm.team@nepservices.com.

- Admin features in the Chat area
  - For all groups created in Connect Plus+, there can be a chat group created

- ○ Admins can ban a member from a group, this prevents a member from accessing the group.
- ○ Admin can remove a user from the Chat by Banning them in all chat groups that admin created. This would prevent the user from seeing the chat group you banned them from completely.
    - ■ Banning a member does not remove existing chats, but will remove the member from the group.
    - ■ Cannot add a member who is banned back to a group you banned them from
- ○ Admin can add members to any group
- ○ Only an admin can delete and exit a group
- ○ Admins cannot delete another member's comments

- ● Member features in the Chat area
    - ○ Anyone can create a chat group they can see
    - ○ Any member can chat directly with any other member, can't turn that off - Admins can't see these
    - ○ Anyone can block a user, this prevents a user from messaging me
    - ○ In a chat anyone can comment, reply to comments, use emoji's, share files, photos, videos, and audio files, and create polls.
    - ○ Admins cannot remove a poll that is created by someone else
    - ○ Anyone can delete their own polls
    - ○ Any member can leave a group

Email & SMS

Description: Emails are an important part of communication with your members, Admins can share important updates with your members. Show your members what the board is doing for them. Share valuable information all your members can benefit from knowing.
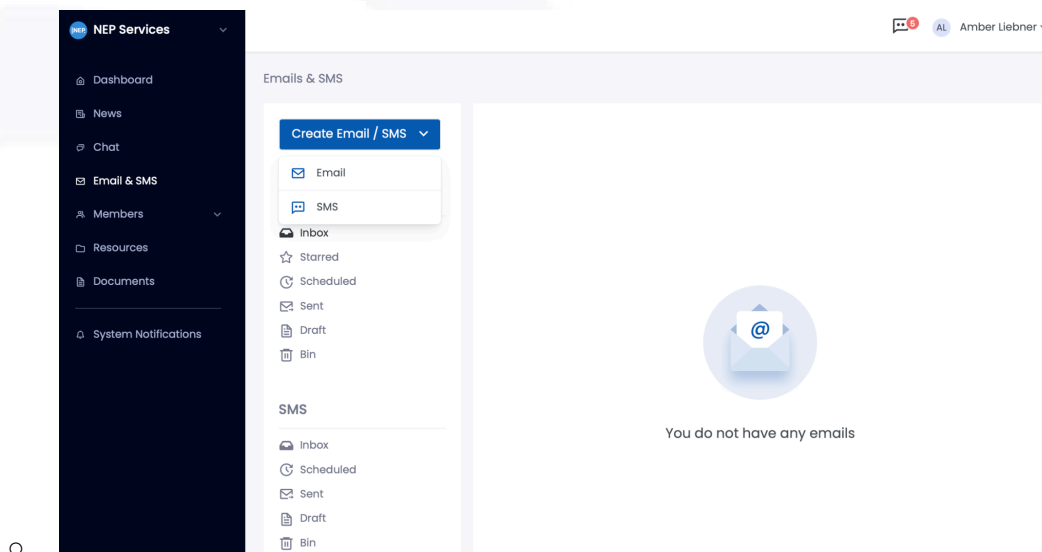
- ## How to Send Emails

  NOTE: NEP has done everything we can do to ensure Connect Plus+ has a great delivery rate so your emails reach your members. However, we can't control email servers or the settings in your member's email accounts. So it is a good idea to encourage members to check their spam/junk folders to ensure receipt of your emails.

  Email Tip: A great way to ensure your members see your emails is to send text messages letting members know you sent an email and ask them to check their emails. By sending an announcement as a Text this will ensure your members know to check their inboxes AND it will help train the email accounts of your members that these emails are important and should always be delivered to the inbox.

  - To send emails, click on the "Create Email/SMS" button
  - A drop down will appear
    -
  - Select Email
  - Type your "Subject"
  - Type the body of your email
  - Include any editing you would like from the many options available.

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- ■ *Note: A guide for the editing options, see Text Editor above.*
  - ○ If you have an attachment, navigate to the section at the bottom of the screen Titled "Attachments."
  - ○ Click the words "upload files"
  - ○ Navigate through your computer or your mobile device for the file you would like to attach.
  - ○ Click the bottom at the bottom titled "Next steps"
  - ○ Now add the individuals OR Groups of members you want to send this email to.
    - ■ *Note: You can include individual members AND Groups of members*
  - ○ If you are ready to send your email, click "Send Email"
  - ○ If you would like to send your email on a different day and time, you can schedule your email by selecting a date in the "Date" field AND a time in the "Time" field.
    - ■ Note: Both day and time are needed when you schedule an email.

- ● How to Send SMS (also known as Text messages)

  NOTE: Text messages are a great way to send announcements, reminders and urgent info to ensure your members see your messages.
  - ○ To send an SMS, click on the "Create Email/SMS" button
  - ○ A drop down will appear
  - ○ Select SMS
  - ○ Type your message
    - ■ *NOTE: you can always send website links, email addresses and phone numbers and all will hyperlinked once the text is sent.*
  - ○ You have 300 characters for each text

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○ TIP: If your text message is longer than 300 characters, you can always type your message and include (1 of 2) at the end of the 1st message, and (2 of 2) after the 2nd message.

○ Click the button that says "Next step"
○ Now add the individuals OR Groups of members you want to send this text to.
  ■ *Note: You can include individual members AND Groups of members*
○ If you are ready to send your text, click "Send SMS"
○ If you would like to send your email on a different day and time, you can schedule your email by selecting a date in the "Date" field AND a time in the "Time" field.
  ■ *Note: Both day and time are needed when you schedule an email.*

Member's Database

Description: Store the basic information of your members so you can communicate with them or build out a comprehensive database to keep all your members information in one place. Eliminate the need to keep up with multiple databases!

Members List

- This is where you will find all members in your database
- Search for a member by their name, email or phone number
- Sort your members by the groups you have organized them by
- Sort members by Application Status. Application Status is the status of the member in the software

  - **Application Status**
    - **Approved**
      - This is a member who accepted their invitation if the person was imported or Manually added.
      - This will also be the application status us if someone requested access to your organization and an organization admin has approved the request
    - **Invited**
      - This is the status of someone who has been imported OR has been manualled added
      - Someone with this status cannot login and see any information in Connect Plus+ until they accept their invitation
      - You can still send emails and text messages to anyone with this status
    - **Pending**
      - Someone who has requested access to your Organization in Connect Plus+.
      - This person will not be able to gain access to your organization unless you approve them.
      - This person will not get any emails or text messages sent unless you approve their request.

- Members will be listed in alphabetical order, you can sort this by clicking on the arrow next Title "Name" at the top of the member's list.

- You can select All Members to make some changes in bulk by clicking in the box in the header bar

- When selecting a member or multiple members you will see a menu appear at the bottom of the page.
  - Resend Invites
    - Anyone with the invited status will get another email invite
    - An email invite will time out after 72 hours for security reasons
    - Sending email invites can be sent to people one at a time or in bulk

- ○ Add to Group
    - ■ Selected members can be added to a group or multiple groups
- ○ Deactivate Profiles
    - ■ Keep this profile information in your database but remove the ability for this person to login
    - ■ Remove the ability for this person to receive information you send out
- ○ Create a Chat
    - ■ Create a new chat group with the selected members
- ○ Delete Profiles
    - ■ Delete profiles to remove the data from your database
    - ■ Delete profiles to remove this person's access to your organization

- ● **User Permissions**
    - ○ You can easily sort your members by their permissions
    - ○ Change permissions in bulk by clicking on the check box to peoples names then select the drop down under User Permissions to change these permissions for one person or multiple people.
    - ○ **Permission Options:**
        - ■ Permissions are the foundation of each of your members access to the system
        - ■ **Member Permission:**
            - ● This is the most used permission setting
            - ● This allows members to see News Articles that have been shared with them specifically or with a group they are in
            - ● This allows members to participate in the Chat feature (if Chat is left on for members only)
            - ● Allows members to view copies of all emails and text messages an admin has sent them in their email and SMS inboxes.

- Cannot see or access the Members Tab at all
- Allows members to view all Resources that have been shared with them specifically or with a group they are in
- Allows members to view all document folders and documents that have been shared with them specifically or with a group they are in

■ **Organization Admin**
  - Can edit Dashboard
  - Can create News Articles
  - Can participate in Chat (Unless Chat has been turned off completely)
  - Can send emails and SMS messages
  - Can manage member database
  - Can manage everything with the member data
  - Can manage groups
  - Can manage the profile builder
  - Can import and/or add members
  - Can approve members who requested access
  - Can create resources, delete resources, edit resources
  - Can create folders, edit folders, upload documents and manage who access to these

■ **Content Admin**
  - Can do all things members can do
  - Can create a news article and post it
  - Can send an email
  - Can send a SMS
  - Can create resources
  - Create folders and upload documents

■ **Representative**
  - Can do everything the Content admin can do

- Can see the member tab
- Can see the groups tab

- **Edit members Profiles**
  - Click on the drop down arrow next to the member's name to expand the view.

  - You can copy the email or phone number by clicking on icon to the right of the email or phone number
  - You can click on the email to send an email
  - You can click on the phone to call
  - You can view what groups this person is in
  - You can edit the profile from here or add people to groups

  - Click on the "Edit basic info" button to edit the information on the members Profile
  - When on the member's profile you can view information on the profile
  - If you want to edit any of the information, click on the Pencil Icon to edit information in that section of the profile.

Profile Settings

Basic Info ✏

First Name
Amber

Last Name
Liebner-Gmail

Middle Name

Work status
Active Member

User permission
Member

Notifications Info ✏

Mobile Phone number
+19494236074

Email
liebner55@gmail.com

Authentication Info ✏

Mobile Phone number
+19494236074

Organization Info ✏

General   Beneficiaries   Job

- **Groups**
  - The purpose of groups is to organize your members into groups of users you wish to communicate with all at once AND/OR share information with. In other words you can set permissions by groups.
  - To create a group click on the "Add group" button
  - Add the name of the group, for example "Active Members"
  - You can add an image if you want to, this is not required
  - You can add a description if you want to, this is not required
    - Tip: The most common use of the description is to explain how the group is used if you have more than one admin so everyone is on the same page.
  - When done, click "Create Group"
  - To edit a group there click on the three dots on the right hand side.

- ○ A drop down menu will appear

- ○ Here you can create a group chat (this will create a group chat in the Chat section)
- ○ Update group to make changes to how the group was set up, for example if you want to change what the group is called or add a description.

- ○ **Add Member**
  - ■ To add members to to a group
  - ■ This will take you to the members page

- Select all members you want to add to a group by clicking in the check box next to that person's name
- Click on the "Add to Group" option that shows in the menu at the bottom of the screen.
- Click all groups that apply in the drop down menu
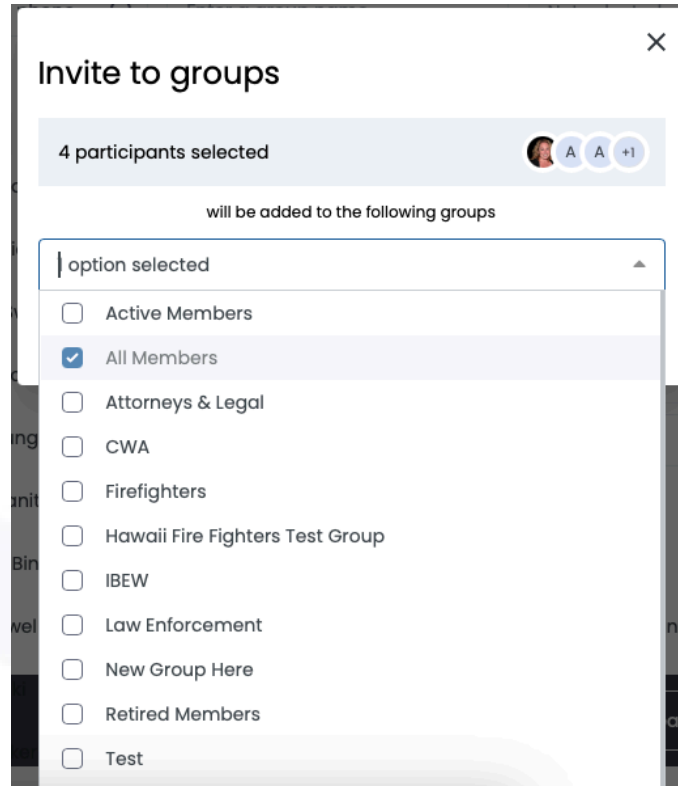
- ■ Once you have clicked all groups you want to add these people to, click back in the main pop up window to see the "invite" button
- ■ Click on the "Invite" button
- ■ NOTE: this will NOT send anything to your members. This is only adding people to the group(s) you added them to.

- ○ **Remove Members from Groups**
  - ■ Navigate to the group you want to remove people from
  - ■ Click on the three dots on the right hand side of the screen
  - ■ Select the option "Remove Member"
  - ■ In the pop up search for the member or members you want to remove
  - ■ When ready select the "Remove from Group" button

Resources

Description: The Resource section is one of your most valuable sections of this site. This section is intended to include webpages or web links with important information your members could benefit from. This can include: Legislative updates, Pay & Benefits, How and when to file a Grievance, Peer Support, Member Benefits. Anything and everything your members might ask you about. Anything and everything that your members could benefit from looking up. This section is where you can add everything that encourages your members to login to look up this information.

- Creating a Resource Page
  - A resource page is basically a web page we can any kind of information
  - Each page can have permissions for ONLY Organization admins or set for ALL members, or any group of members you would like.
  - To create a new page, click on the button in the upper right hand corner titled "Add Resources"
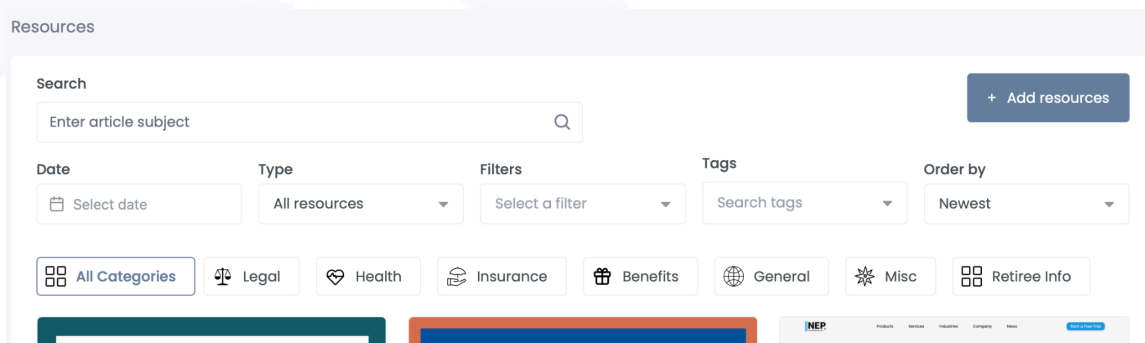
  - Select the option titled "Page Type Resource"

External Link

Share a link to an external resource and allow your org to access it from the platform.

Add external link

Page Type Resource

Create your own resource by uploading a picture and coming up with your own title and description.

Create resource

- ○ After selecting Page Type Resource you can add a Page Thumbnail and Page Cover images
- ○ The Thumbnail is the image you see on the Resource page, where all resources are. The image is not required.
- ○ The Page Cover is the long rectangular image that is on the resource page when it is open.
- ○ The images are not required, however, just like on Social Media, any resources with images are more likely to be viewed.
    - ■ Note: Canva can be a great tool that is easy to use to create these images. Contact your CSM to have us share the template with you if you use Canva.
- ○ Add the Title
- ○ Add any information and use the text editor to format the page as you like.
- ○ Select a "Category" that best matches the page your adding
- ○ Type the word or words you want to add for Tags, Tags are not required
    - ■ For example to add a tag type the words such as: Legislative Updates. Then click on the tag created below to add the new tag

Tags

Legislative Updates ▲

PRESS ENTER TO CREATE TAG

Legislative Updates

- ○ Click on the "Next Step" button
- ○ Decide if you want to share this page with an individual or groups or both
- ○ Select any and all individuals you want to share this information with. *Note: By sharing all you are doing is setting the permissions of who can access this page.*
- ○ Select any and all groups you want to share this information with. *Note: By sharing all you are doing is setting the permissions of who can access this page.*
- ○ Select the "Create Page" button

- ● Creating a Resource Link
  - ○ A resource link is a website page you want your members to have access to
  - ○ Each link can have permissions for ONLY Organization admins or set for ALL members, or any group of members you would like.
  - ○ To create a new link, click on the button in the upper right hand corner titled "Add Resources"
  - ○ Select the option titled "External Link" Resource
  - ○ The Thumbnail is the image you see on the Resource page, where all resources are. The image is not required.
  - ○ The images are not required, however, just like on Social Media, any resources with images are more likely to be viewed.
    - ■ Note: Canva can be a great tool that is easy to use to create these images. Contact your CSM to have us share the template with you if you use Canva.

- ○ Copy the URL of the website you want to add to the Resource web links, paste it in the section titled "URL"
    - ■ Note: the URL is the website, you can find the website address in the web browser
- ○ Add the name of the URL in the "Title" section
- ○ Add details if you wish, this is not required.
- ○ Type the word or words you want to add for Tags, Tags are not required
    - ■ For example to add a tag type the words such as: Legislative Updates. Then click on the tag created below to add the new tag
- ○ Click on the "Next Step" button
- ○ Decide if you want to share this page with an individual or groups or both
- ○ Select any and all individuals you want to share this information with. *Note: By sharing all you are doing is setting the permissions of who can access this page.*
- ○ Select any and all groups you want to share this information with. *Note: By sharing all you are doing is setting the permissions of who can access this page.*
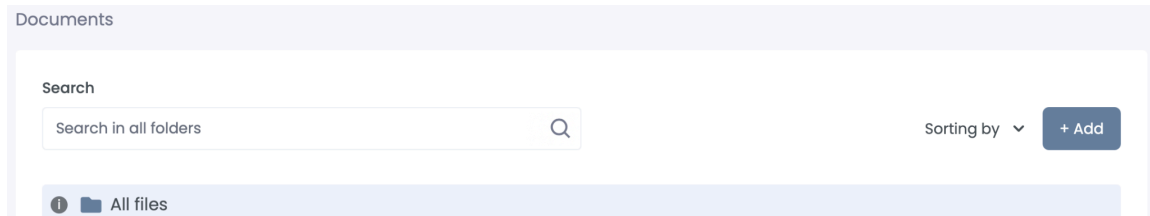- ○ Select the "Create weblink" button

Documents

Description: The Documents section is your virtual document storage space. You can easily keep all documents the Board needs access to and/or all documents your members should have access to.
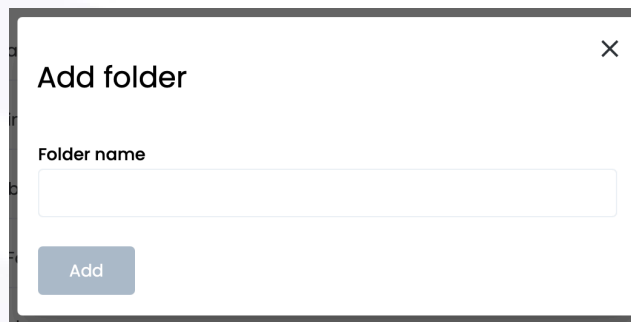
- Creating a Document Folder
  - To create a folder, click on the "+Add" button in the upper right hand corner

  - You will see a drop down menu with "Folder" and "File" as an option
  - Select "Folder"
  - A pop up will appear

  - Add the Folder's Name in the text box
  - Click on the "Add" Button
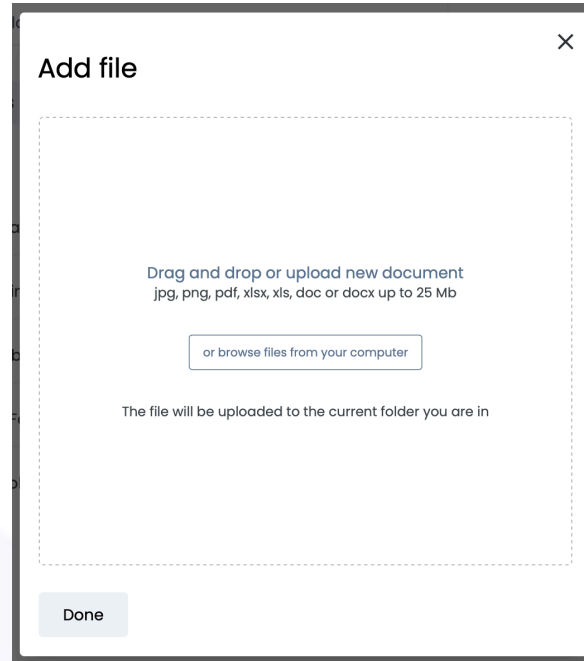- Adding a Document
  - To add a document, click on the "+Add" button in the upper right hand corner
  - You will see a drop down menu with "Folder" and "File" as an option
  - Select File
  - A pop up will appear

- ○ Drag and drop the file into the box
- ○ OR click on the box that says "or browse files from your computer"
- ○ This will allow you to search your computer or mobile device to find the file you want to add.
- ○ Select Done

● Set Permissions for Documents

- ○ There are two ways to share a folder or a file.
- ○ Click on the three dots
- ○ Select the "Share" option in the drop down

- ○ OR click on the Share Icon, which will open up a pop up window

- ○ Once you have the pop up window open choose who you want to have access to this folder
- ○ Select an individual or a few individuals
- ○ Select a group or several groups
- ○ Click "Save"
- ○ The link in the screen shot above is only if you want to copy the the link to this folder or file to your members via email or SMS. Nothing will get sent to your members unless you send something.
- ○ NOTE: If you have set the permissions of a folder to share with the "All Members" Group for example, that means everything inside that folder will have the same permissions. They cannot be set to be different at this time.