



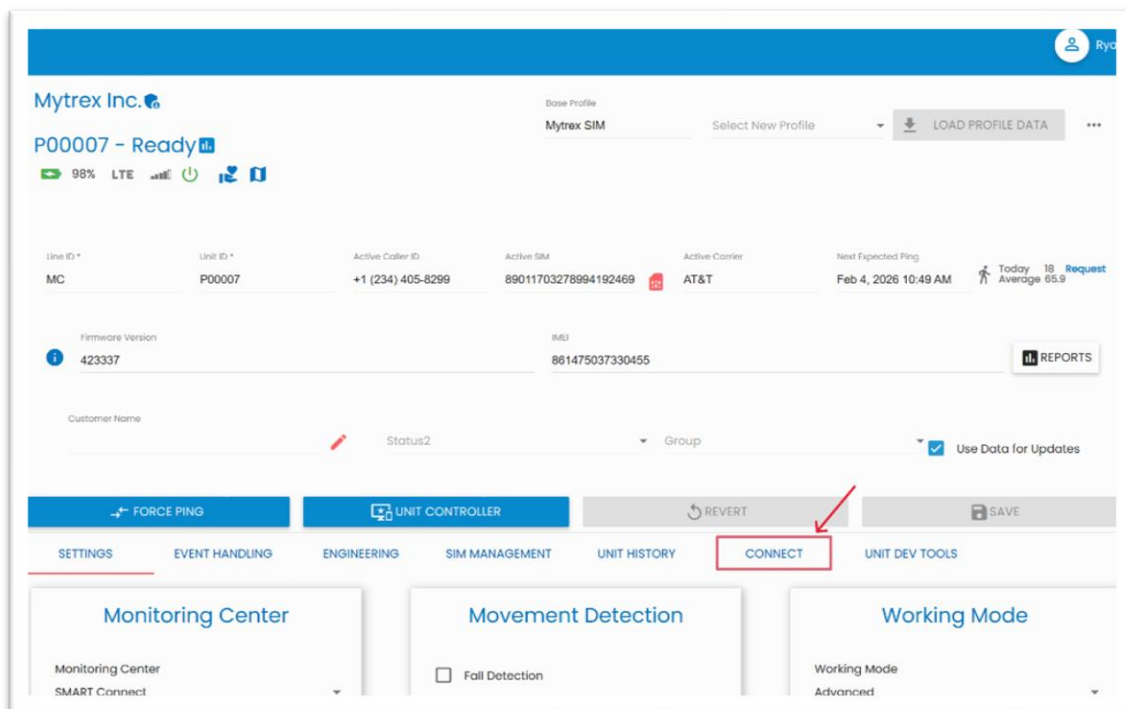
Connect App 365 – Dealer Instructions

Part 1 – Connect App 365 Dealer Guide

Setting Up Connect App 365 Customers and Caregivers

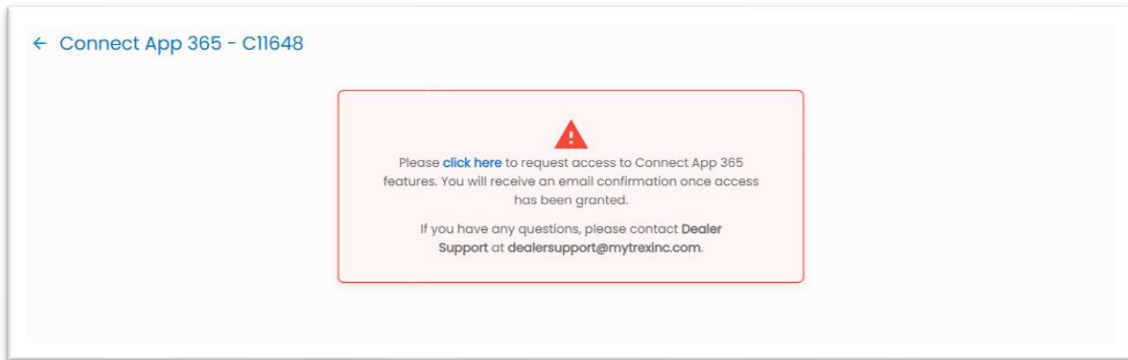
These instructions walk dealers through setting up Connect App 365 customers and caregivers. Follow these steps when a customer or their caregivers want access to Connect App 365.

Step 1: Creating the End User (Customer) in myLink



- 1- Log into myLink and find the unit you want to connect to the app.

2- On unit details page, click on the “Connect” tab.



3- Select “click here” to obtain access to Connect App 365 (if you don’t see this screen, it means you are ready to move to the next step)

Customer First Name *	Customer Last Name *	Customer Home Address(optional)
John	Doe	10321 South Beckstead Lane, South Jordan, UT 84095

[+ CREATE CUSTOMER](#) ←

4- Enter customer’s first and last name.

5- Enter home address (Optional).

6- Click “Create Customer”.

Step 2: Connect Tab Overview

After creating a customer, the Connect tab provides three caregiver management functions:



- **Manage Caregivers** – View and manage assigned caregivers
- **Add Caregiver** – Add new caregivers to the account
- **Recent Changes** – Review caregiver account activity and changes

Manage Caregivers Tab

The Manage Caregivers tab displays all caregivers currently assigned to the customer.

Information displayed includes:

- Name
- Email Address
- User Type
- EULA Acceptance Status

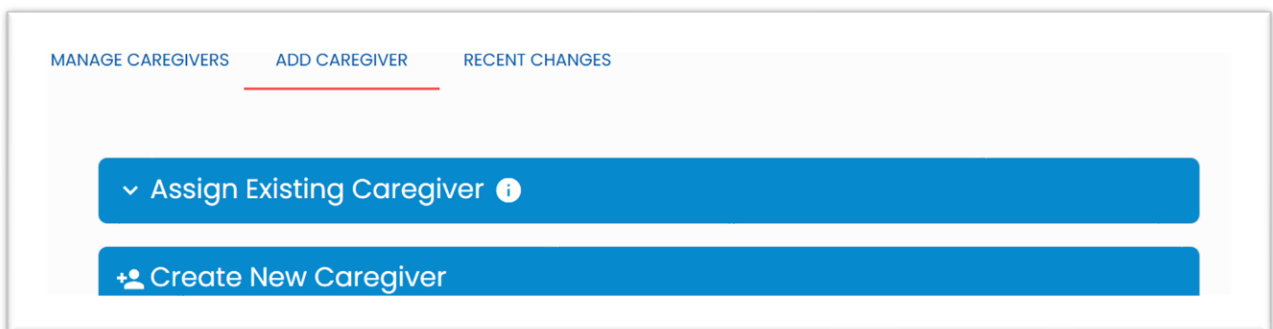
Available actions:

- Edit caregiver information
- Modify caregiver permissions
- Remove caregivers
- Click the More Options icon (:) to access additional actions, including resending the Welcome Email.

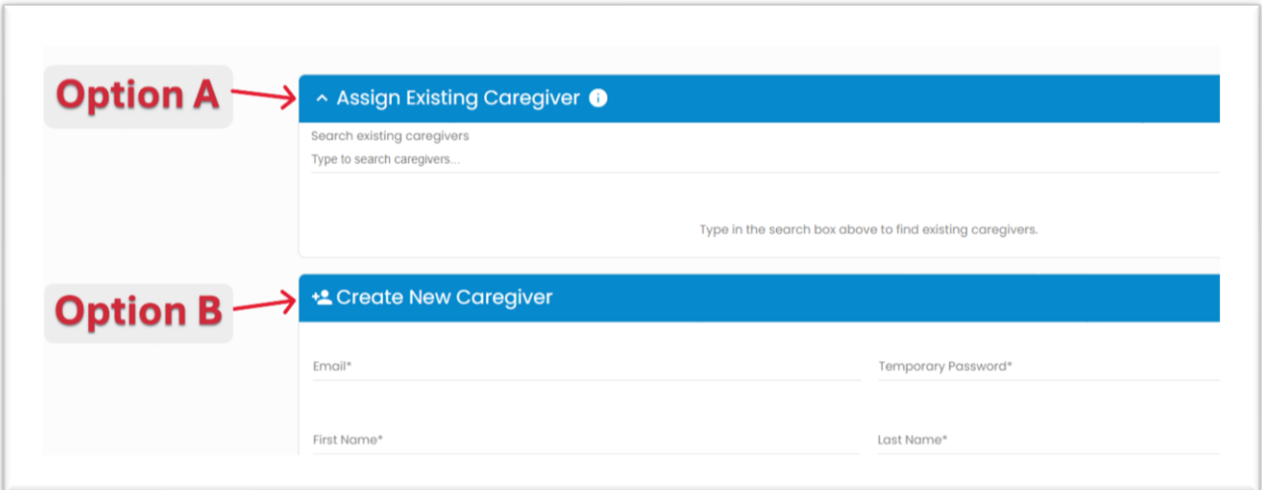
Name	Email	User Type	EULA	Actions
Bob Smith	bob.smith@email.com	Admin		
Mary Smith	mary.smith@email.com	Interactive		

Add Caregiver Tab

After the customer is created, you can assign caregivers to the customer.



Select “Add Caregiver”. This brings up the caregiver creation screen.



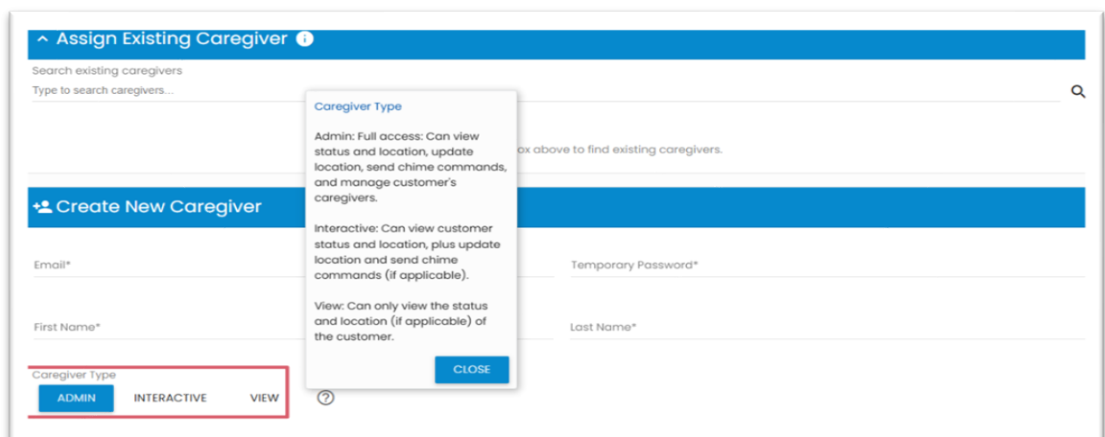
There are two ways to add caregivers:

Option A: Add and Existing Caregiver

- If a caregiver is already assigned to another device/customer, search for them and add the them to this customer.

Option B: Create a New Caregiver

- 1- **Enter the caregiver's email address.**
- 2- **Create a temporary password.** (Caregiver will be prompted to create their own password once they login to Connect App 365 for the first time.)
- 3- **Enter the caregiver's First and Last name.**
- 4- **Select the "Caregiver Type":** Admin, Interactive, or View.



a) Admin

- Full access to the Caregiver App
- Can:
 - View device status and location
 - Ping the device for current location

- Send chime commands (help locate a misplaced device)
- Add, remove, or edit caregivers

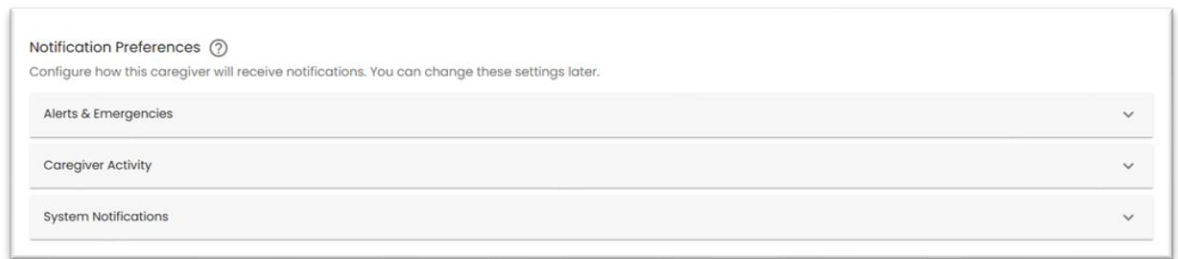
b) Interactive

- Can:
 - View the Caregiver App
 - Ping the device for location
 - Send chime commands
- Cannot:
 - Add or remove customers or caregivers
 - Edit app or device settings

c) View Only

- Can only:
 - View current device status and location
 - View notifications

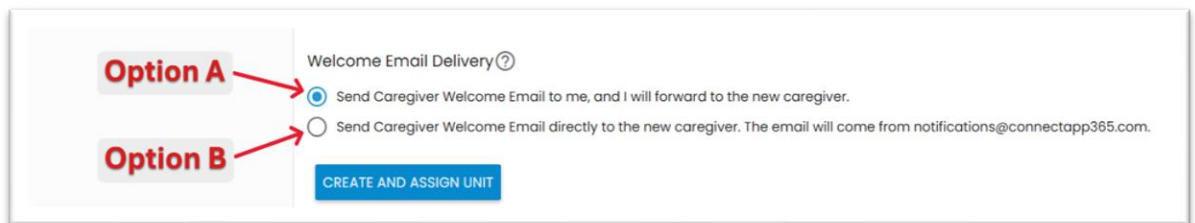
5- Configure Notification Preferences



The Connect App 365 includes several notification categories. Each caregiver can receive notifications via email or push notification, depending on preference.
Note: Any of these settings can be changed later.

- a) **Alerts and Emergencies:** Critical notifications such as low battery alerts.
- b) **Caregiver Activity:** Notifications when caregivers are added, removed, or updated.
- c) **System Notifications** Scheduled maintenance and feature releases within Connect App 365. (Note: This is maintenance and updates to the app, *not* the device itself).

6- Caregiver Welcome Email Delivery Options



Select where the Caregiver Welcome Email will be sent.

The Welcome Email notifies the caregiver that they have been given access to Connect App 365 and assigned as a caregiver for the customer. The email also includes:

- Their temporary password
- A link to connectapp365.com
- An overview of key features available within the Caregiver App
- Instructions for logging in and creating a permanent password

Option A: Send Caregiver Welcome Email to me, and I will forward to the new caregiver?. Select this option to receive the Welcome Email first so you can forward it to the caregiver or share the login details using your company's branding.

Option B: Send Caregiver Welcome Email directly to the new caregiver: When selected, the Welcome Email is sent directly from myLink to the new caregiver and will come from notifications@connectapp365.com

7- Finalize Caregiver Creation



The screenshot shows a form with two radio button options. The first option is selected and is labeled "Send New Caregiver Login Information to me, and I will forward to the caregiver". The second option is unselected and is labeled "Send New Caregiver Login Information directly to the caregiver. The email will come from notifications@connectapp365.com". Below the options is a blue button labeled "CREATE AND ASSIGN UNIT" with a red arrow pointing to it from the right.

- a) Click Create and Assign Unit.
- b) The caregiver will be successfully assigned to the customer, and the Welcome Email will be sent.

Recent Changes Tab

This feature allows dealers to review caregiver account activity and verify changes made within Connect App 365.

Activity types include:

- Information Updates
- Permission Changes
- User Added
- User Deleted

Filtering options include:

- Change Type
- Affected Caregiver

- Changed By

The screenshot shows a filter bar with three tabs: 'MANAGE CAREGIVERS', 'ADD CAREGIVER', and 'RECENT CHANGES'. The 'RECENT CHANGES' tab is selected and underlined in red. Below the tabs are three filter fields: 'Type' with a dropdown arrow, 'Affected Caregiver', and 'Changed By'. A 'CLEAR FILTERS' button is located on the right side of the filter bar.

Each record includes:

- Date and time of the change
- Affected caregiver
- User who made the change
- Description of the activity

Completion

At this point: - The customer is created - Caregivers are added and assigned - Notifications are configured

The account is now fully set up and ready for use in the Connect App 365.

Part 1 Complete

Continue to Part 2: Connect App 365 Caregiver Guide

Part 2 – Connect App 365 Caregiver

Caregiver Welcome Email

Welcome to Connect App 365

Hello,

Welcome! You've been assigned as a Caregiver for **John Doe** and have been granted access to **Connect App 365**. This app allows you to:

- View **John Doe's** location
- Check equipment status
- Help locate a lost or misplaced device
- And much more!

Your Account Details

Email: ryan@mytrexinc.com

Password: *You can log in using your existing Connect App 365 credentials. If you can't remember your password, you can [click here](#) to reset it or click "Forgot Password" on the login screen.*

Customer: John Doe

Device Serial Number: W10003

Next Steps

Click the link below to log in:

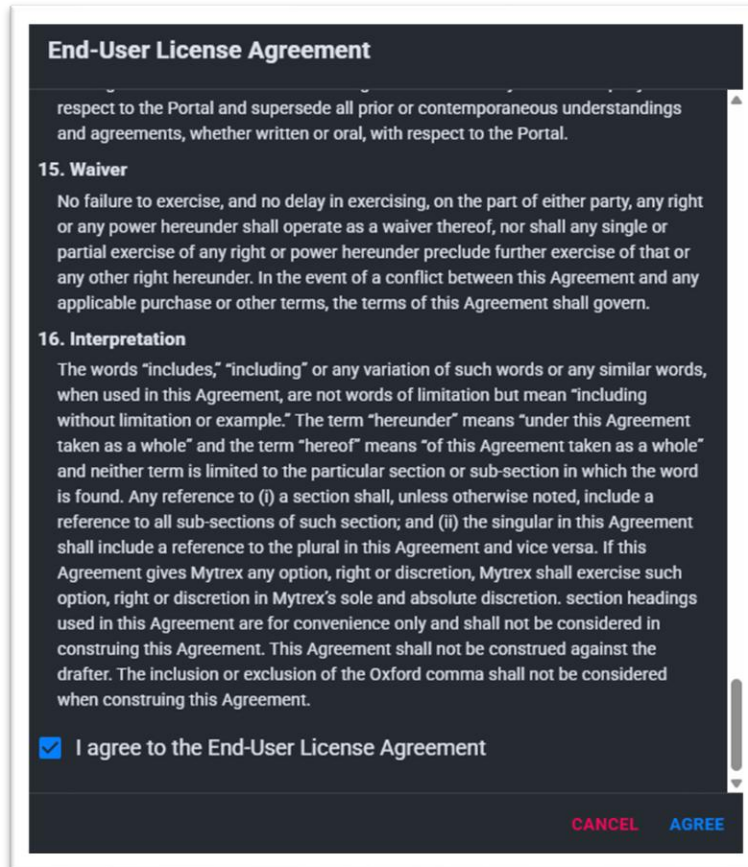
[Log In to Connect App 365](#)

The caregiver will receive a Welcome Email containing the following information:

- Notification that they have been assigned as a caregiver for [Customer]
- A brief overview of key features available within Connect App 365
- The caregiver's username (email address)
- Temporary password
- The associated device serial number
- A link to "Create Your Account" to complete setup

Once the caregiver clicks “Create Your Account” they will be taken to connectapp365.com where they will be prompted to create their permanent password.

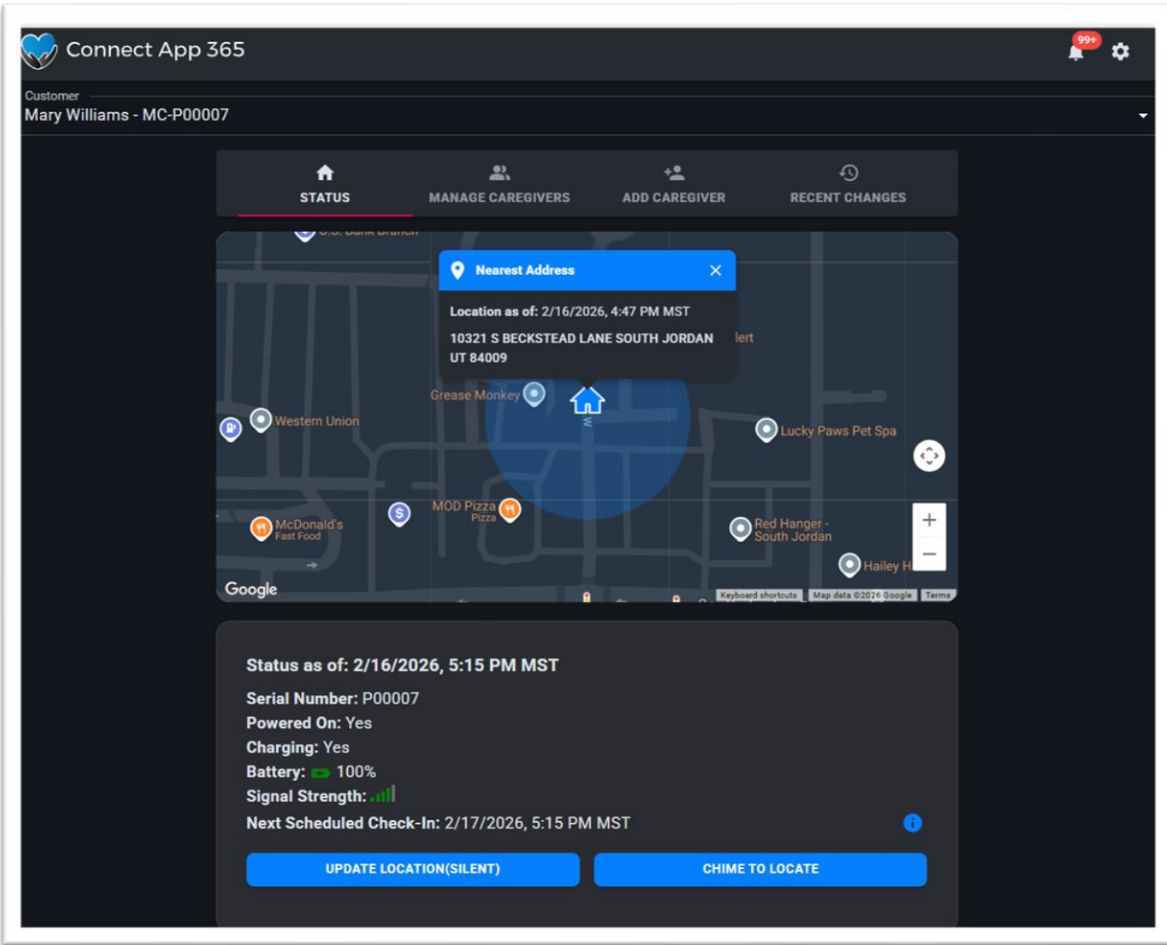
Caregiver EULA



Once they have created their password, they will see the End User License Agreement (EULA). (They cannot go forward until they agree to the EULA).

Part 3 – Connect App 365 Caregiver Guide

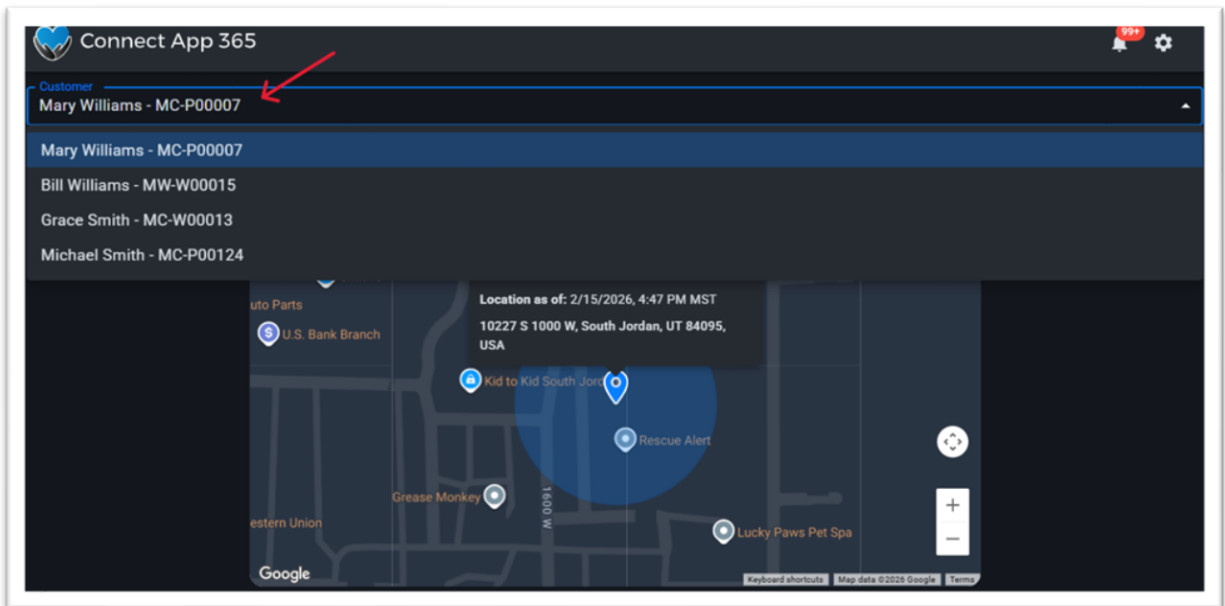
After accepting the End User License Agreement (EULA), caregivers are directed to the Connect App 365 Dashboard. This is the primary screen caregivers see each time they log in to the application.



The Connect App 365 Dashboard serves as the caregiver's primary interface and central hub for device status, managing caregivers, reviewing activity, and interacting with the device in real time.

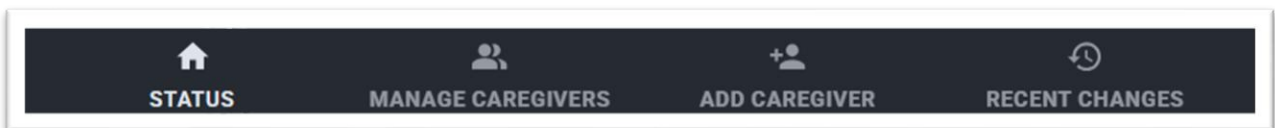
Dashboard Layout Overview

Customer Drop-Down Menu



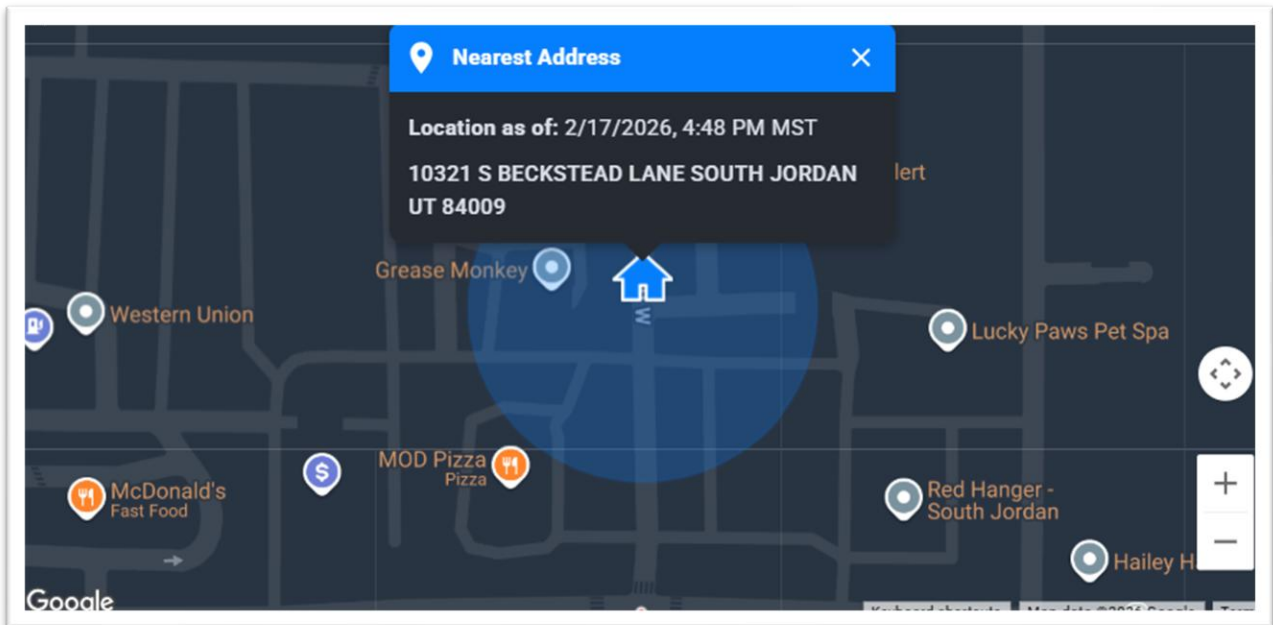
Located beneath the top navigation area, the Customer Drop-Down Menu allows caregivers assigned to multiple customers to select and switch between customer accounts.

Tabs (Above the Map)



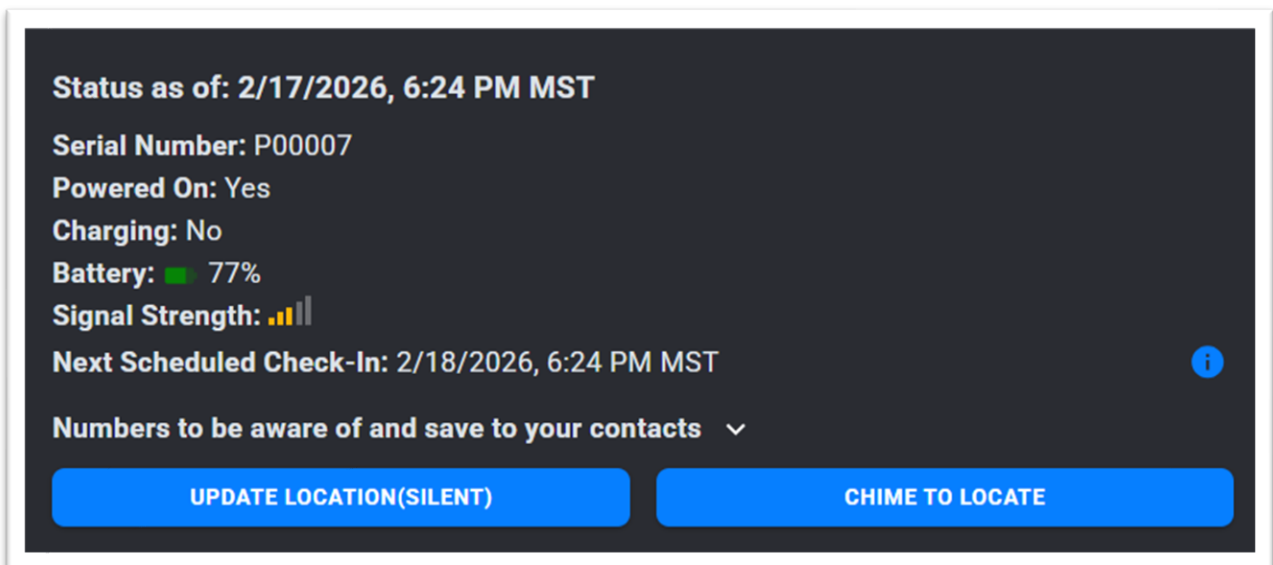
- Status – Displays real-time device location and status information.
- Manage Caregivers – View and manage assigned caregivers.
- Add Caregiver – Add new caregivers to the account (Admin only).
- Recent Changes – View caregiver account activity history.

Map Section



- Displays the device's last reported location.
- Includes a timestamp indicating when the location was recorded.

Device Status Information and Device Interaction Controls (Below the Map)

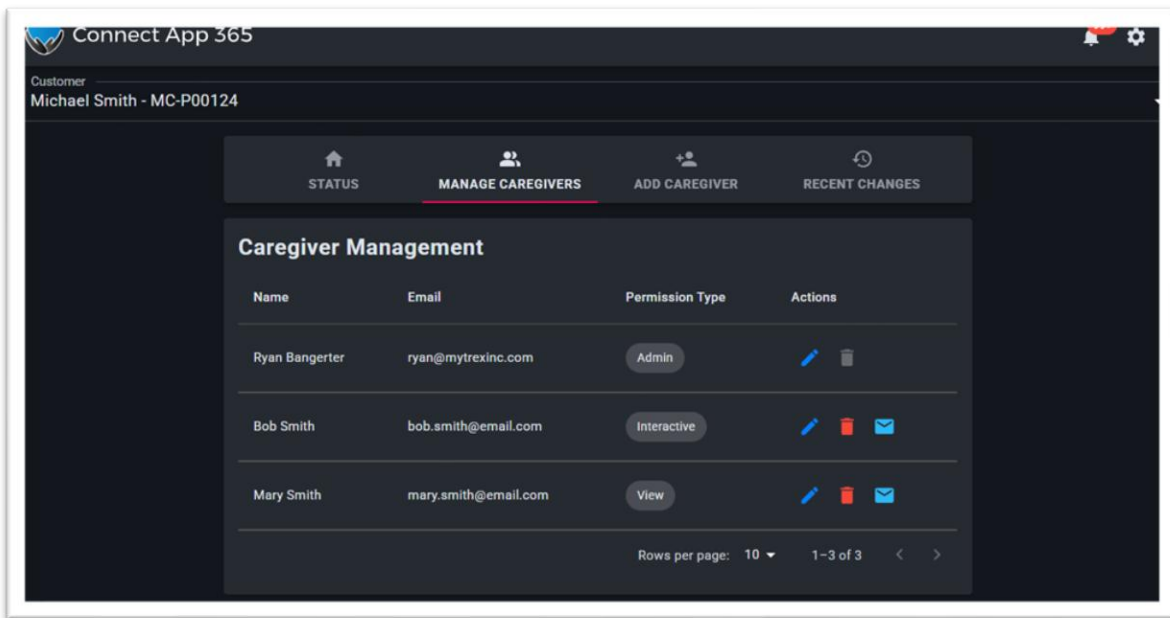


- **Status as of** – Date and time the device's last reported information.
- **Serial Number** – Unique identifier for the device.
- **Powered On** – Indicates whether the device is on or off.
- **Charging** – Indicates whether the device is actively charging.
- **Battery Percentage** – Current battery level.
- **Signal Strength** – Cellular connectivity displayed as signal bars.

- **Next Scheduled Check-In** – When the device is scheduled to automatically report its next update.
- **Update Location (Silent)** – Requests the device’s current real-time location.
 - Updates both the map and device status information.
 - May take up to 30 seconds to refresh.
 - The update is confirmed when the “Status as of” timestamp briefly changes color.
- **Chime to Locate** – Sends a command to the device to emit an audible chime for approximately 20 seconds
 - Useful if the device has been lost or misplaced

Caregiver Management

Manage Caregivers Tab (Above the Map)



Displays all currently assigned caregivers, including:

- Name
- Email Address
- Permission Type

All caregivers may update their own personal information and notification preferences. Caregivers with Admin-level permission may add, edit or remove other caregivers from the account.

Add Caregiver Tab (Admin Only - Above the Map)

The screenshot shows the 'Add New Caregiver' form in the Connect App 365 interface. The form is titled 'Add New Caregiver' and is located in the 'ADD CAREGIVER' tab. The form includes the following fields and options:

- Connect App 365 Access:** A toggle switch with 'YES' and 'NO' options.
- First Name ***: A text input field.
- Last Name ***: A text input field.
- Email Address ***: A text input field.
- Temporary Password ***: A text input field.
- Phone Number ***: A text input field. Below it, a note states: 'Phone number to be used for calls or notifications.'
- CALL / NOTIFY / NOTIFY ONLY:** A toggle switch with 'CALL / NOTIFY' and 'NOTIFY ONLY' options.
- User Type:** A radio button selection with three options: 'View Only' (selected), 'Interactive', and 'Admin'.
- Notification Preferences:** A section with three expandable categories: 'Alerts & Emergencies', 'Caregiver Activity', and 'System Notifications'.

At the bottom of the form, there are two buttons: 'CANCEL' and 'ADD CAREGIVER'.

Allows Admin users to add new caregivers to the account by entering the required information and configuring their notification settings:

- **Required Information**
 - First Name
 - Last Name
 - Email Address
 - Temporary Password
 - User Type
- **Notification Preferences** – Configure which alerts and updates caregivers will receive and select the preferred delivery method. These settings may be modified at any time.
 - **Notification Categories**

- Alerts & Emergencies – Emergency alerts (triggered when the end user presses their help button) and critical low battery alerts (triggered when the device battery level drops below 10%).
- Caregiver Activity – Generated when caregiver accounts are added or modified.
- System Notifications – Scheduled maintenance updates and newly added Connect App 365 features.

Note: Additional notification types may be added periodically as Connect App 365 evolves.

- **Delivery Methods**

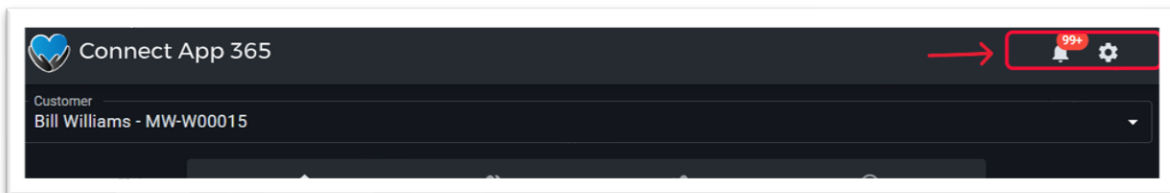
- Email – Notifications are sent to the caregiver’s registered email address.
- Push – Real-time pop-up notifications sent to the caregiver’s browser or mobile device, even when the app is not open

Recent Changes Tab (Above the Map)

Displays a record of caregiver account activity, including:

- Caregiver creation, removal and modifications
- EULA acceptance

Additional App Controls



Notifications (Bell Icon)

Displays a record of recent events associated with those found in the Notification Preferences section.

Settings (Gear Icon)

- Profile – Update name and email address, change password, and view the complete list of notifications.
- Light/Dark Mode – Toggle between light and dark display themes.
- Theme Settings – Customize the app’s appearance.
- Bookmark Tutorial – Instructions for adding Connect App 365 to a mobile device home screen.
- Logout – Logs the user out of the application.

Part 4 – Adding Connect App 365 Icon to a Mobile Device Home Screen

Adding the Connect App 365 to your home screen allows caregivers to access the application quickly, just like a standard mobile app.

For iPhone and iPad Users (iOS)

1. Open the Safari browser. (Important: You must use Safari. Other browsers may not support this feature.)
2. Navigate to connectapp365.com.
3. Tap the Menu button (three horizontal dots "...") in the Safari toolbar. (If you do not see the three dots, skip this step and proceed to Step 4)
4. Tap Share in the menu that appears.
5. In the Share sheet, select More.
6. Locate and tap Add to Home Screen.
7. Customize the name if desired, then tap Add in the top right corner.
8. The Connect App 365 icon will now appear on the device home screen like a regular app.

Once added, caregivers can tap the icon to open Connect App 365 directly without first opening a browser.

For Android Users

1. Open the Google Chrome browser. (For best results, use Google Chrome on your Android device.)
2. Navigate to connectapp365.com.
3. Tap the Menu button (three dots "...") in the upper-right corner of Chrome.
4. Select Add to Home Screen from the menu options.
5. Customize the shortcut name if desired, then tap Add or Install to confirm.

The Connect App 365 icon will now appear on the device home screen like a regular app. Once added, caregivers can tap the icon to open Connect App 365 directly without first opening a browser.