



**Frequently Asked Questions:**

# Managing Recipients

a training guide by *oneday*



## How do I add a prospect and additional recipients in the OneDay mobile app?

- + Log in to the OneDay for Senior Living app on your mobile device
- + On the home screen, tap the three lines in the top right corner
- + Then, Tap Prospects
- + In the top right corner, tap the plus sign (+). It is above the search bar, to the right of the Select Resident option
  - Now tap the button with the small plus sign that says "+ Add Prospect"
    - Choose "Create new prospect" or "Add from contacts"
    - If you chose, "Create new prospect" enter their first name, last name, and email address or mobile number
    - Once you have entered the following information, tap "Done" in the upper right-hand corner of the screen ("Done" will turn green once all information is entered correctly)
    - If you choose, "Add from contacts" you'll be able to access the contacts on your device. Select a person and then choose their phone or email to add to OneDay; then tap "Add"
  - Once a Prospect is added you will have the ability to "+ Add Additional Recipient"
    - Once you tap "+Add Additional Recipient" you have three options
      - + Pick from Contacts - Same as above; choose someone from your device's contact list
      - + Add new contact by email by entering their first name, last name, and email address
      - + Add new contact by mobile number by entering their first name, last name, and mobile number
  - Once you've added the Prospect and Additional Recipients, you can tap Next at the bottom of the screen to create a video or tap the X in the top left corner to return to your prospect list.

## How do I add a Resident and Additional Recipients in the OneDay mobile app?

- + Log in to the OneDay for Senior Living app on your mobile device
- + On the home screen, tap the three lines in the top right corner
- + Tap Residents
- + In the top right corner, tap the plus sign (+). It is above the search bar, to the right of the Select Resident
  - Tap "+ Add Resident"
    - Choose "Create new resident" or "Add from contacts"
    - If you chose, "Create new resident" enter their first name, last name, and email address or mobile number
    - Once you have entered the following information tap "Done" in the upper right-hand corner of the screen ("Done" will turn green once all information is entered correctly)
    - If you choose, "Add from contacts" you'll be able to access the contacts on your device. Select a person and then choose their phone or email to add to OneDay; then tap "Add"
  - Once a Resident is added you will have the ability to "+Add Additional Recipient"
    - Once you tap "+Add Additional Recipient" you have three options
      - + Pick from Contacts - Same as above; choose someone from your device's contact list
      - + Add new contact by email - enter their first name, last name, and email address
      - + Add new contact by mobile number - enter their first name, last name, and mobile number
  - Once you've added the Resident and Additional Recipients, you can tap Next at the bottom of the screen to create a video or tap the X in the top left corner to return to your resident list

## How do I edit or remove a Prospect or Resident in the OneDay app?

- + Log in to the OneDay for Senior Living app on your mobile device
- + On the home screen, tap the three lines in the top right corner
- + Tap Prospects or Residents
- + Tap the person you want to edit
- + In the top right corner of their profile screen, tap "Edit"
- + Make the changes to their contact information or tap "Archive this Prospect" or "Archive this Resident"

## How do I edit or remove an Additional Recipient in the OneDay app?

- + Log in to the OneDay for Senior Living app on your mobile device
- + On the home screen, tap the three lines in the top right corner
- + Tap Prospects or Residents
- + Tap the associated person you want to edit. (Ex: If you want to edit the daughter's contact information for a Prospect - you'll select that prospect's name in this list.)
- + Tap the "Additional Recipients" tab
- + Tap the "Additional Recipient" you want to edit or delete
- + Make the changes to their contact information or tap "Remove this contact"

## How do I add Prospects or Additional Recipients on the Partner Portal?

### ***Adding a Prospect on the Partner Portal***

- + On your computer, navigate to the website: [go.oneday.com](http://go.oneday.com)
- + Log in using the same credentials you do for the app
- + When you are within a community click the red "+Add button" in the top right corner
- + Select "Prospect"
- + Enter their First Name, Last Name, select Community from the dropdown menu, and enter their email or phone (optional)
- + Click "Submit"

### ***Adding an Additional Recipient on the Partner Portal***

- + On your computer, navigate to the website: [go.oneday.com](http://go.oneday.com)
- + Log in using the same credentials you do for the app
- + When you are within a community click the red "+Add button" in the top right corner
- + Select "Additional Recipient"
- + Enter their First Name, Last Name, select the associated Prospect from the "Channel" dropdown menu, and enter their email or phone number
- + Click "Submit"

### **How do I edit or delete Prospects on the Partner Portal?**

- + On your computer, navigate to the website: [go.oneday.com](https://go.oneday.com)
- + Login using the same credentials you do for the app
- + When you are within a community click the grey square with the words "Prospects" in the top center of the screen
- + Click the prospect you want to edit
- + At the top of this prospect's profile, click the word "Edit"
- + Adjust the contact information or Archive this prospect

### **How do I add a Resident on the Partner Portal? How do I edit or delete Residents or Additional Recipients on the Partner Portal?**

- + Currently these features are not yet available; we will notify users when they are built and complete