SETUP, ACCOUNT AND USER

TELECONSULT GUIDE

BY TAQTIK

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ACCOUNT ROLE

- o There is only one Account Owner.
- o The Owner has Admin and Host capabilities.
- o The Owner is responsible for billing duties.
- o The Owner can set the Company Name and Street Address that appear in Email Invitations.
- o On Enterprise accounts, the Owner has access to the white label settings.
- **Admin:**
  - o Admins have all Host capabilities.
  - o Admins are able to join, edit, and delete other hosts' and admins' meetings and recordings.
- **Host:**
  - o Hosts can create and join video conferences and webinars.

- o In Pro and Enterprise accounts, hosts can record their meetings.
- o Hosts have their own Account Dashboard and calendar, they do not see other hosts' meetings or recordings.

LOGIN TO YOUR ACCOUNT

Owner/Admin/Host

- Navigate to your account in your browser (e.g. "app.website.com").
- Enter your **User Name** and **Password** and click **Login**.
- If needed, you can reset your password by clicking the **Forgot Password** link.

- When successfully logged in, you will see your Account Dashboard.
  - o Hosts do not have access to the Billing and Users buttons.
  - o Admins do not have access to the Billing button.
  - o The API is only available on Enterprise accounts.
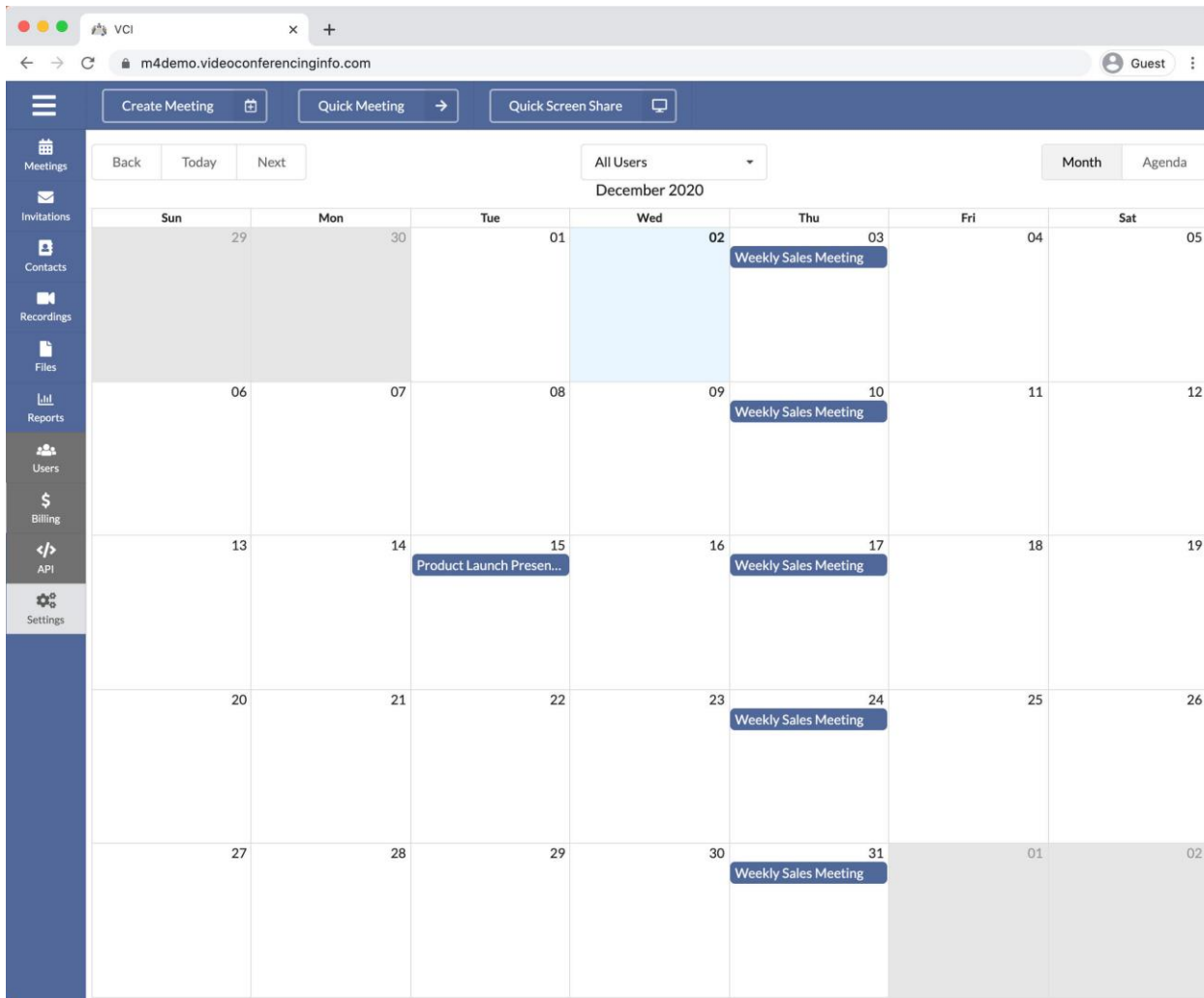
USERS

Owner/ Admin/ Host

The Users section allows you to manage Host and Admin users of your account.

Add: add a new Host and/or Admin user to the account.

- o Requires an available host license.
- o Additional host licenses can be added to your subscription from the Billing section.
- o Send the newly added login the activation email so they can set up their password.
- **Edit:** edit the selected user.
- **Delete:** delete the selected user.
  - o Deleting a user deletes all associated data including meetings, recordings, API keys, and usage history.
  - o Deleted users and their data are **not** recoverable.

Users (3/10)

Search... 🔍

| Full Name	Email	Roles	Active
Debra Morello	debra.morello@company123.com	Owner Admin Host	✓
Paula Erikson	paula.erikson@company123.com	Admin Host	✓
Jefferey Melokis	jefferey.melokis@company123.com	Host	✓

Close Add Edit Delete
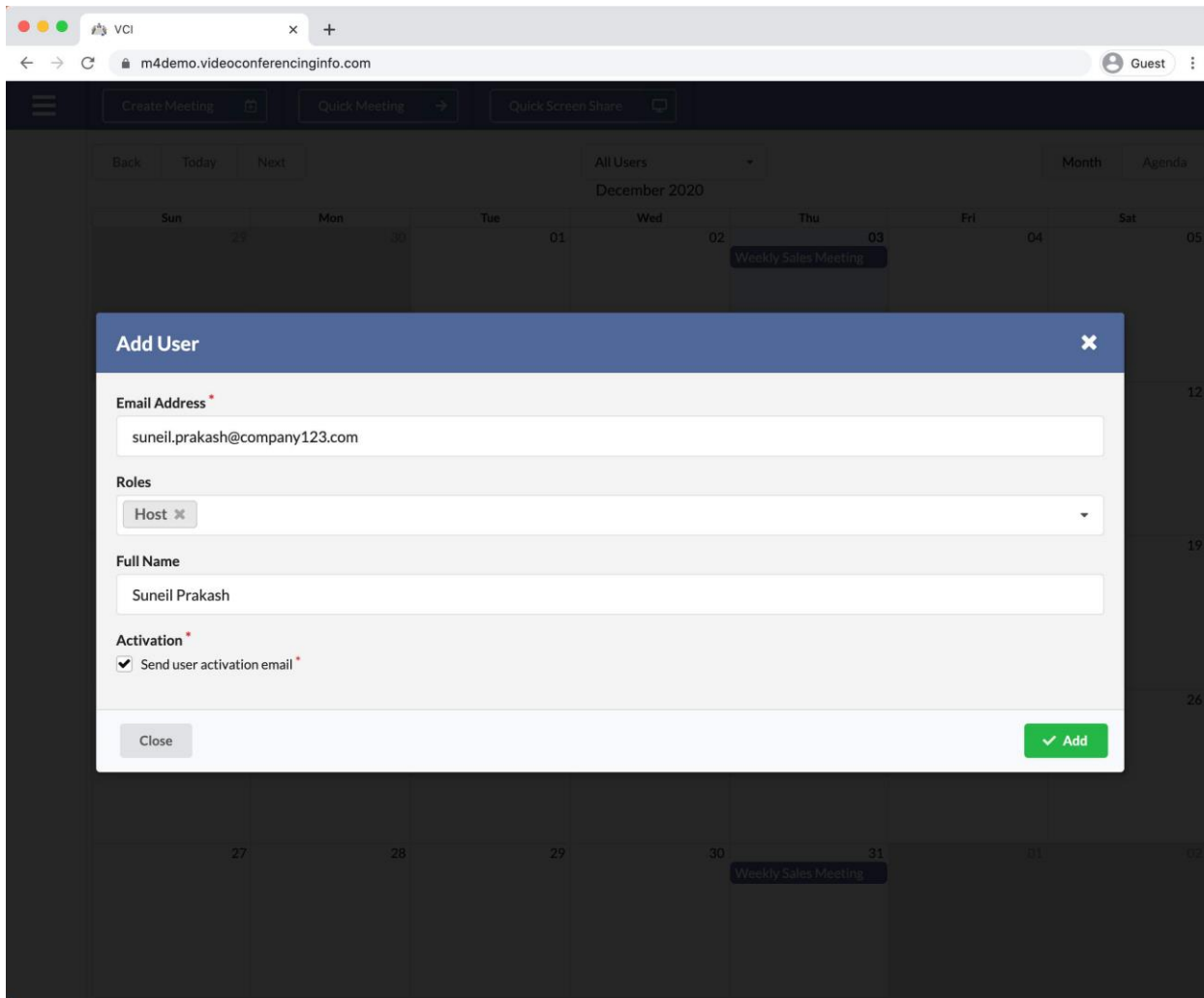
BILLING

Owner/Admin/Host

The Billing section allows you to view your current plan and make changes to your plan and billing preferences.

- **Edit Plan:** Change your plan, billing frequency, number of host licenses, or cancel the subscription.
- **Edit Payment Method:** Update the credit card on file for future payments.
- **Past Invoices:** View PDFs of your previous payments.
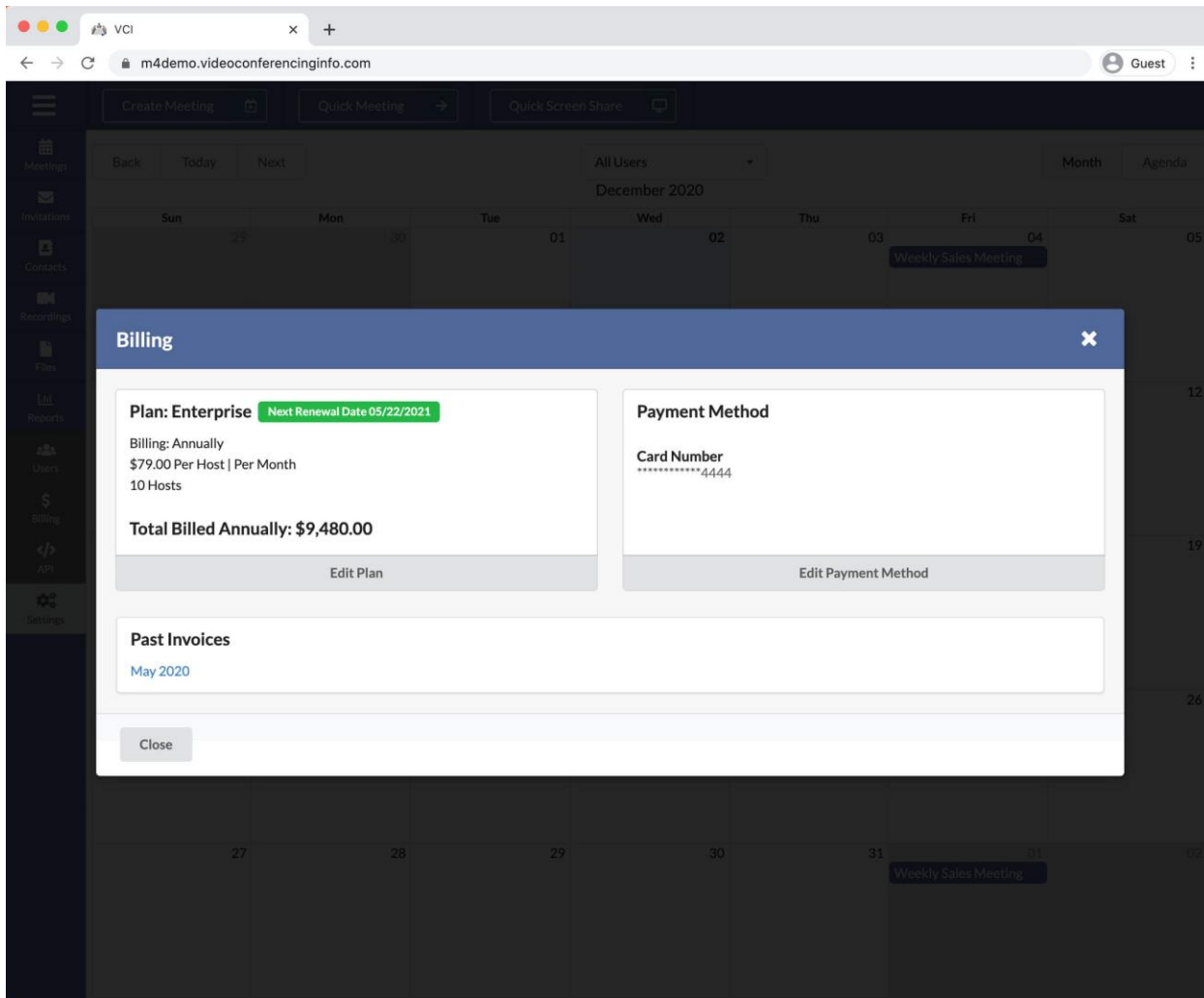
- **Plan:** Change plans (Starter, Pro, Enterprise).
- **Billing:** Change billing frequency between Monthly or Annually.
- **Hosts:** Increase or decrease the number of host licenses.
  - You can only remove host licenses that are not in use by an active user.
  - If you delete an active users, you will be able to remove the host license that was occupied by that user.
  - All accounts require a minimum of 1 license to remain active.
- **Cancel:** Cancel your subscription immediately, and retain access to the end of the current billing cycle.

- **Add/Edit Payment Method:** Update the credit card on file for future payments.

API

 Owner/Admin/Host

The API section allows you to generate API tokens for use with integrations.

API Playground: Discover and test the available schema and API calls.

- **API Endpoint:** The endpoint for your account for all API requests.
- **API Token:** Use the token to authenticate API requests.
    - o **Generate:** Create a new token.
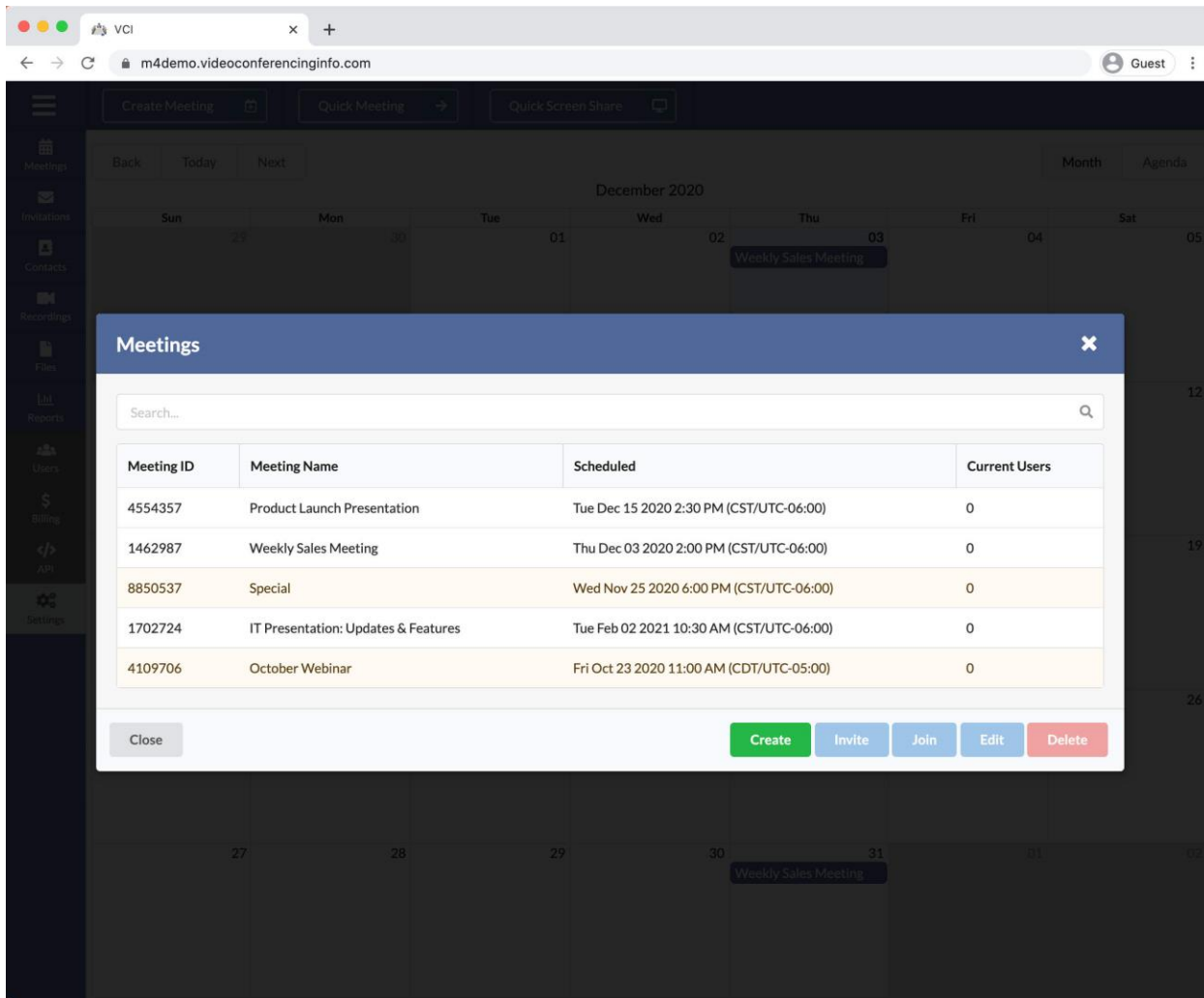   - o **Revoke:** Delete the existing token (cannot be undone).
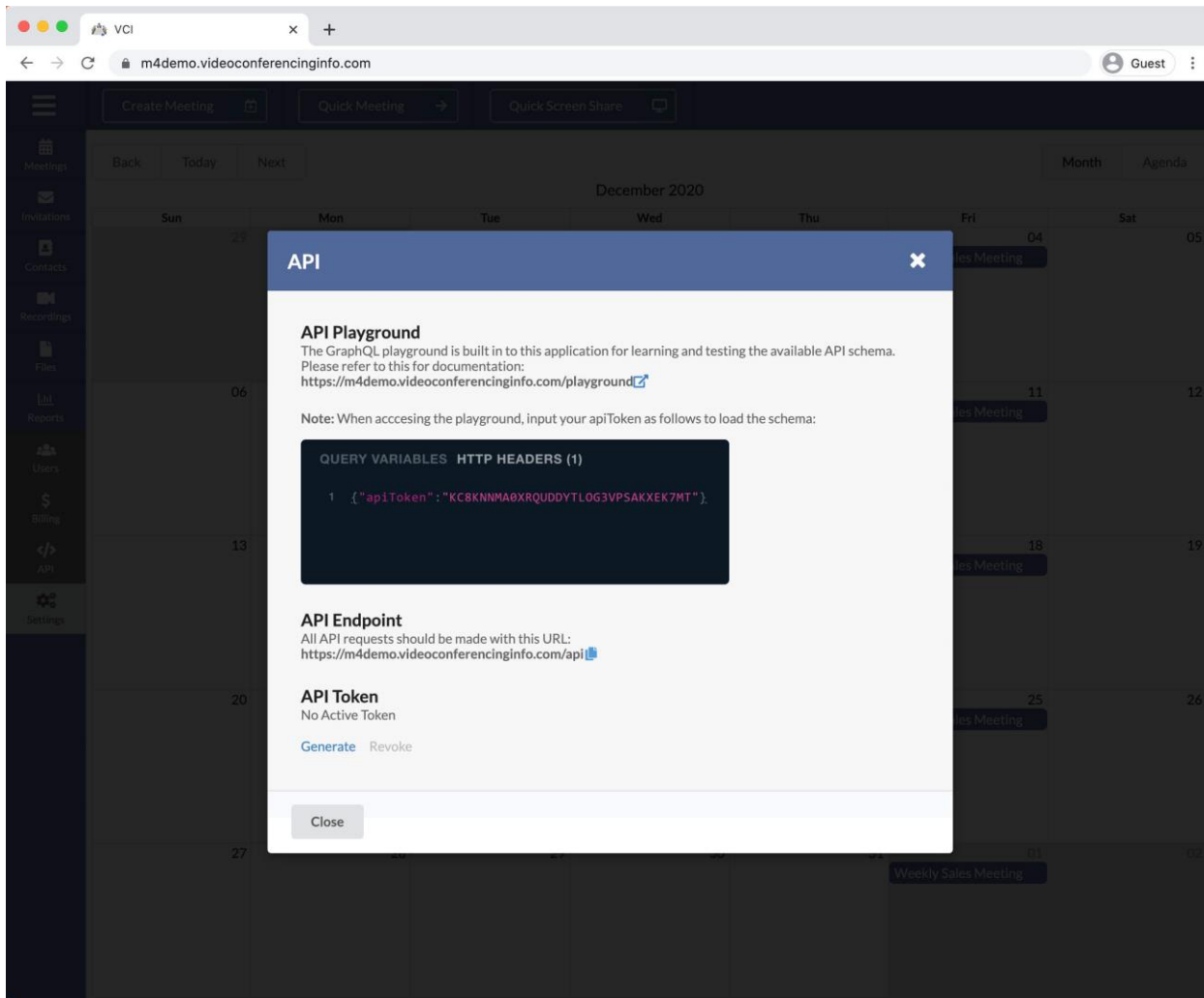
MEETINGS

 Owner/Admin/Host

The Meetings section allows you to view a list of your scheduled meetings.

- **Create:** Create a new meeting.
- **Invite:** Open the Invitations window for the selected meeting.
- **Join:** Join the selected meeting now.
- **Edit:** Change/Update the selected meeting.
- **Delete:** Delete the selected meeting.

Create Meeting

Details:

- **Meeting Name:** Title of your meeting that is displayed on your calendar and Email Invitations.
- **Start Date / Time:** When your meeting will start.
- **End Date / Time:**
  - Meetings that reach their end time are locked and cannot be joined unless a Repeat cycle is also set for the meeting.
    - Meetings with a Repeat cycle remain active until manually deleted or they are unused for 6 months.
  - An inactive meeting can be reactivated by editing the start and end date and time.
- **Time Zone:** Choose the Time Zone for your meeting.
- **Repeat:** Choose how often your meetings will repeat.
  - Every Day
  - Every Week
  - Every Month
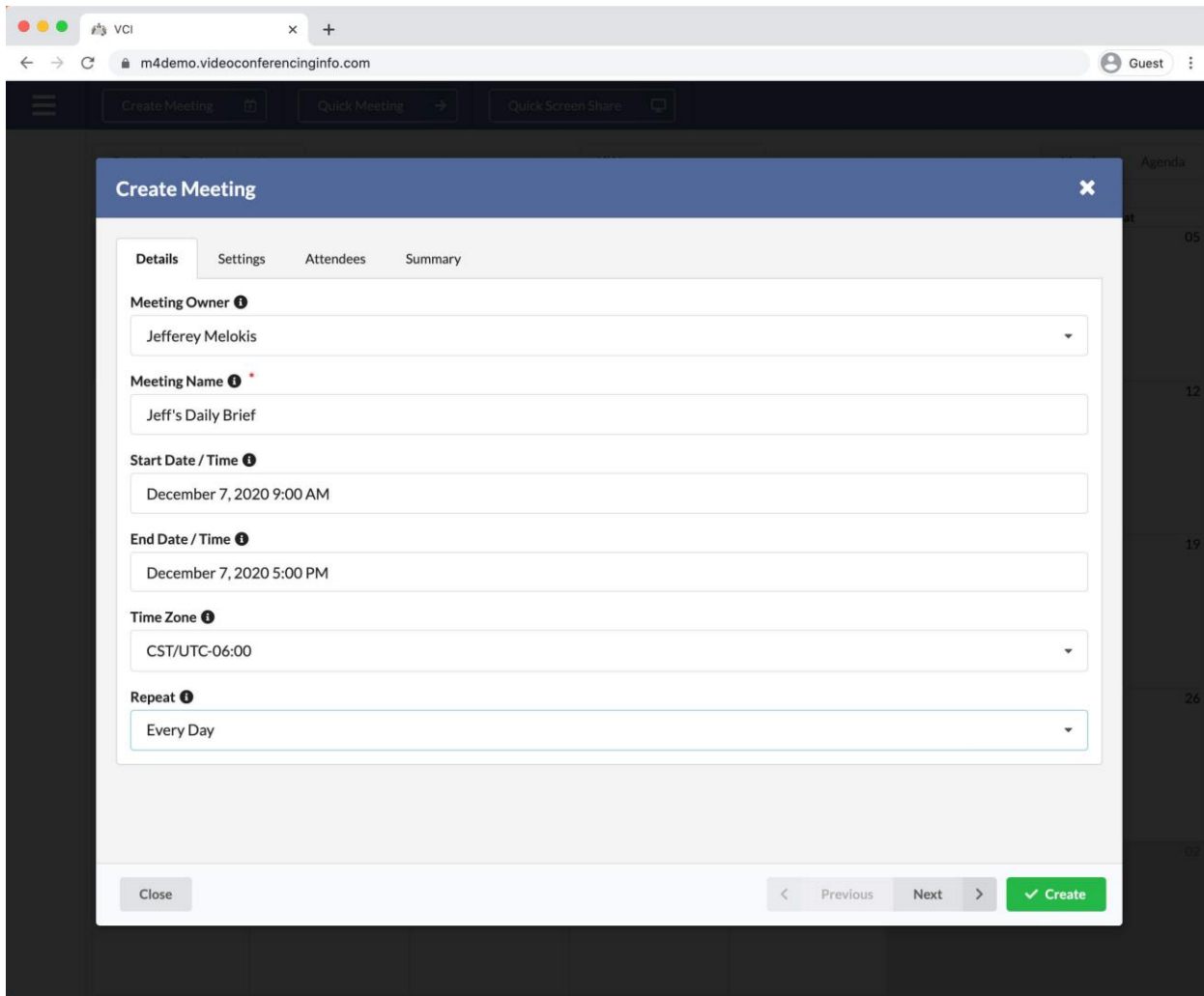
- **Meeting Owner:** The Owner and Admins can create meetings for different users on the account.
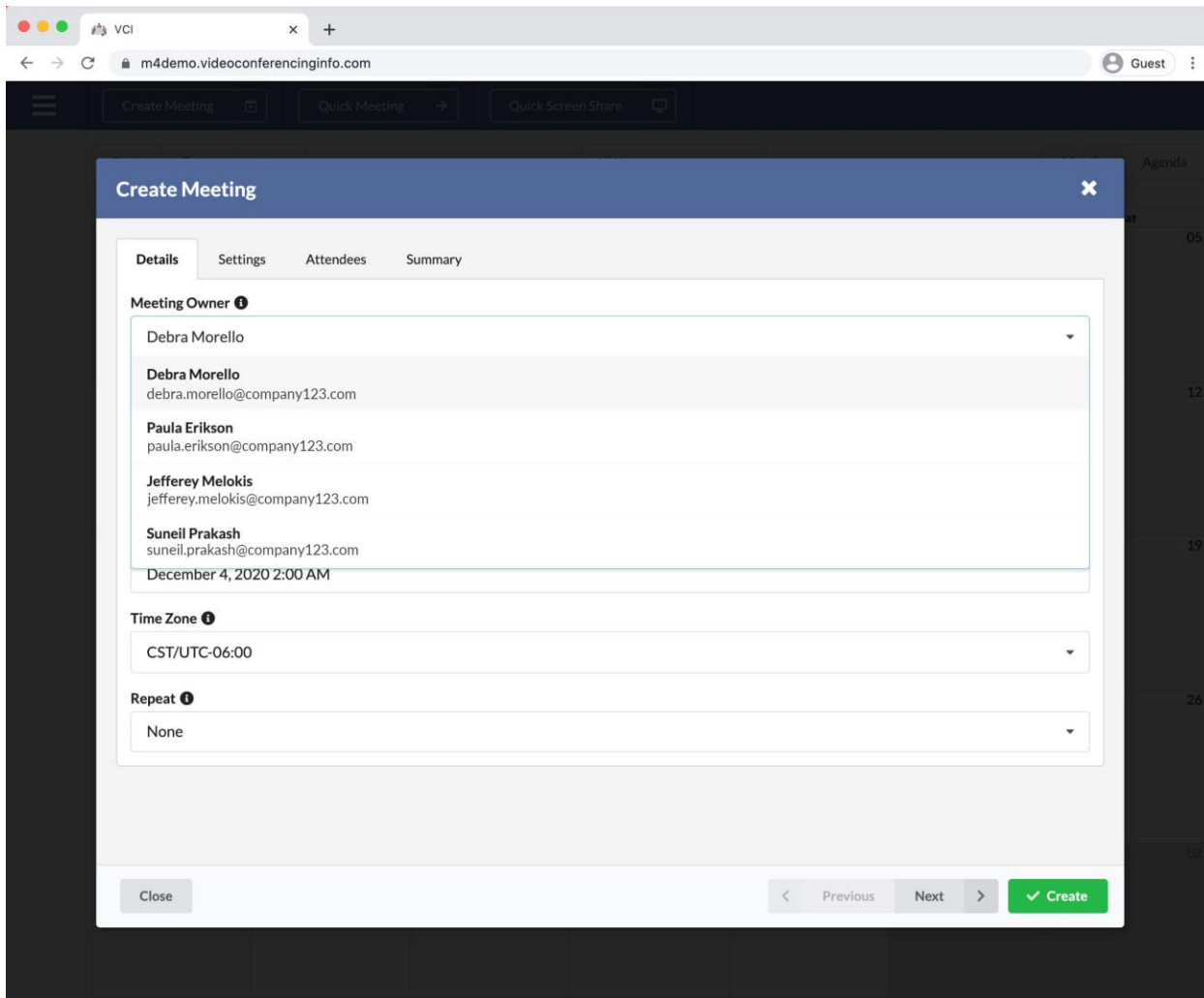
- Click the **Next** button to go to the Settings tab.

Settings:

- Meeting Types:
  - **Video Conference standard:**
    - Video conference for up to 20 users.
    - The meeting link is public and can be shared.
    - All users have access to audio and video streaming.
  - **Video Conference secure:**
    - Standard video conference with secure access enabled.
    - Users must be added to the Attendees tab during meeting creation.
    - Each user will receive a unique link and key for accessing the meeting.
    - Each user can be configured with specific permissions.
  - **Webinar open:**
    - Webinar configured for up to 200 attendees.
    - The Host and Moderators are able to stream audio and video.
      - Users added to the Attendees tab with the Moderator permission have Host capabilities.
    - An open webinar has a single link to share with all guests.
  - **Webinar with registration:**
    - Webinar configured for up to 200 attendees.

- The Host and Moderators are able to stream audio and video.
  - Users added to the Attendees tab with the Moderator permission have Host capabilities.
- Guests must register prior to receiving their link to join the webinar.
  - Each guest receives a unique link after registering to your webinar.
- **Classroom:**
  - Special video conference configuration that allows the Instructor (Host) to see all students (Guests) video streams.
  - Students only see the Instructor and do not see the other students' video streams.
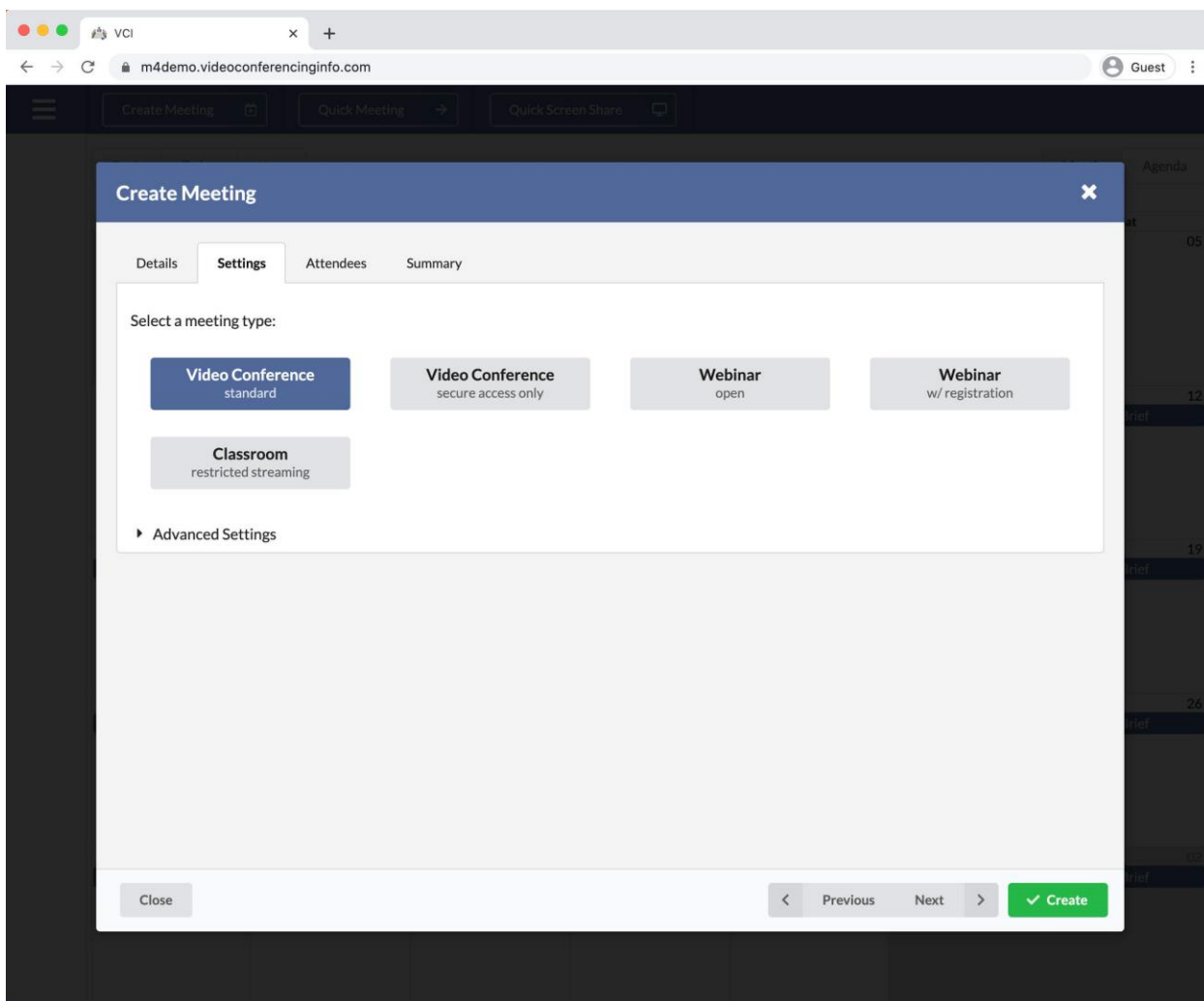
ADVANCED SETTINGS:

-
  - **Meeting Chat:**
    - **Open:** Public and Private chat is available to all users.
    - **Restricted:** Chat is limited to Host-to-Guest and Guest-to-Host.
  - **Meeting User List:**

- **Open:** Names of all participants are visible in the user list.
- **Restricted:**
  - Hosts can see the full list of participants (Guests and other Hosts) in the user list.
  - Guests can only see the Host(s) names in the user list.
- **Hide Automatically:** User list hides after a few seconds upon joining the meeting.

- **Meeting Security:**
  - **Open:**
    - Anyone can join the meeting using the Meeting ID or link.
    - Meeting is capped at 20 users unless Disable Video and Disable Audio are both checked under Guest Restrictions.
  - **Secured:**
    - Each user requires their own access Key to join the meeting.
    - Add users in the Attendees tab during meeting creation.
  - **Registration:**
    - Used for collecting webinar guest names and email addresses.
    - Guests must register in order to receive a link to join your webinar.
    - Hosts, presenters, and chat moderators should be added in the Attendees tab.
  - **Waiting Room:**
    - Before joining your video conference or webinar, your guests will be placed in the Waiting Room.
    - A Host must manually allow guests to join the meeting.
    - **Waiting Room Title:** Text that appears at the top of your Waiting Room.
    - **Waiting Room Description:** Short description of meeting content or other text you want to share before people can enter your meeting or webinar.
    - **Waiting Room Media URL:** Add a video or audio URL to automatically play media in the Waiting Room for guests while they wait. Support URL types include YouTube, Vimeo, Soundcloud, and .mp4 and .mp3 files.
    - **Waiting Room Background Image:** Add a background image to your Waiting Room.
      - Supported File Types: JPG and PNG
      - Recommended Size: 1000 x 1000, 200 KB or less
      - Maximum File Size: 600 KB
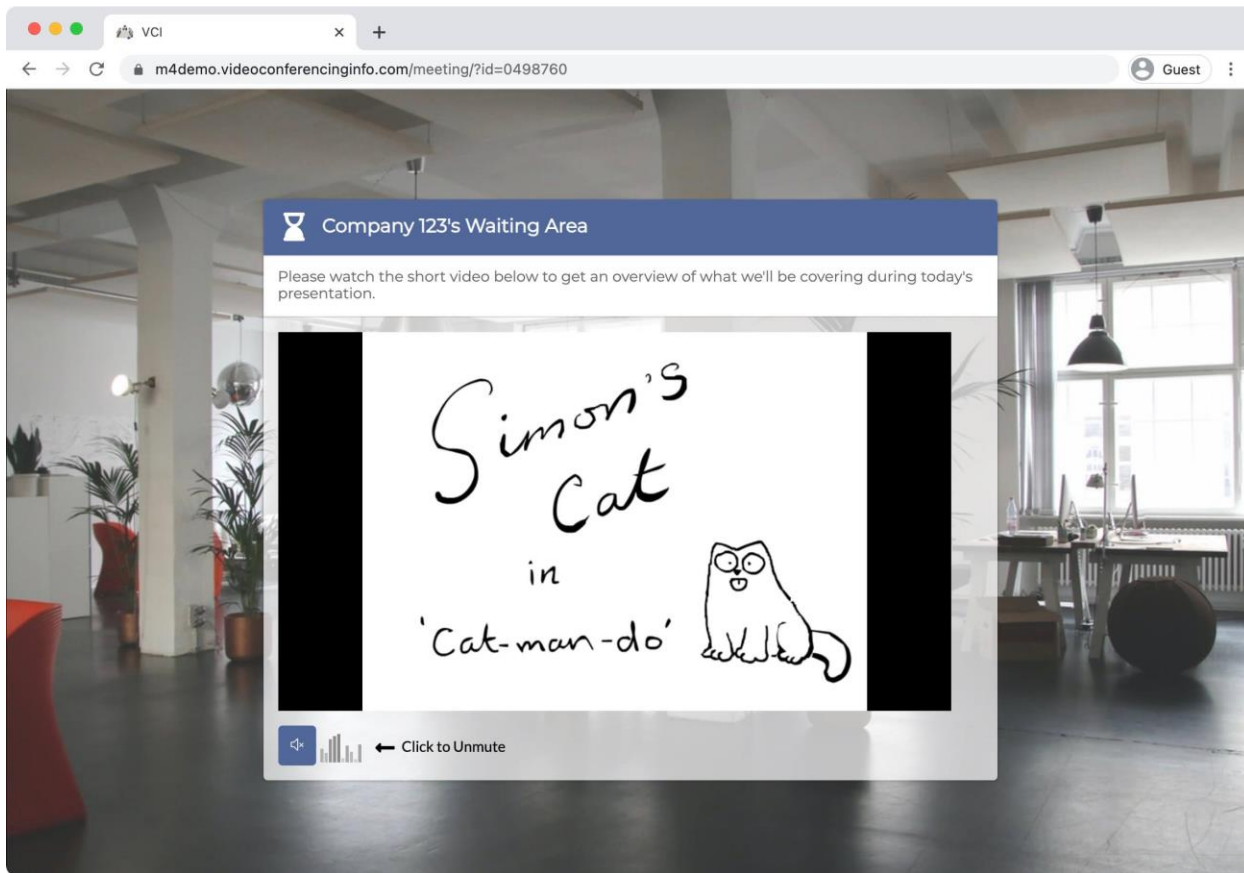
-
    - Guest View

Note:

- o Guests will have to unmute most video and audio files. There is an icon to do so in the bottom left of the media player.

- **Default Behavior:**
  - **Notes:**
    - The Default Behaviors apply to all users who join with ability/permission to stream audio and video.
    - In Video Conferences, it is common to start with Camera and Microphone on by default.
    - In Webinars, it is common to start with Camera and Microphone for the Host(s) off by default.
  - **Turn Microphone On Automatically:**
    - Users will join the meeting with their microphones turned on.
  - **Turn Camera On Automatically:**
    - Users will join the meeting with their webcams turned on.
  - **Tile Layout:**
    - All video images are the same size and change size depending on how many total participants are connected to your meeting.
  - **Speaker Layout:**
    - One large video image appears in the center of the screen.
    - The large video image changes depending on who is speaking.
  - **Large Meeting:**
    - Use this setting for meetings that will have 8 or more camera images.
- **Guest Restrictions:**
  - **Notes:**
    - Restrictions apply to all guests who join an open meeting using the Meeting ID.
    - Guests who join with a Key will override the Guest Restrictions.

- For webinars, it is common to disable most Guest Restrictions and invite additional speakers, presenters, and chat moderators from the Attendees tab.
- Disable Video, Disable Audio, and Disable Screen Sharing are required for a webinar.
  - **Restrict Guest-to-Guest Streaming:**
    - Special video conference configuration that allows the Instructor (Host) to see all students (Guests) video streams.
    - Students only see the Instructor and do not see the other students' video streams.
  - **Disable Video:**Prevents Guests from turning on their webcams.
  - **Disable Audio:**Prevents Guests from turning on their microphones.
  - **Disable Screen Sharing:**Prevents Guests from using the screen share feature.
  - **Disable Web Video Player:**Prevents Guests from using the Web Video Player.
  - **Disable Chat:** Prevents all chat for guests, including Guest-to-Host chat.
  - **Disable File Upload:** Prevents guest from uploading files to the meeting.
  - **Disable File Download:** Prevents guest from downloading files to the meeting.

- Click the **Next** button to go to the Attendees tab.

Attendees:

- **Notes:**
  - Each user added to Attendees receives a unique link with a Key for meeting access.
  - Attendees must be added for Secure Meetings.
  - For Webinars, add additional speakers, presenters, and moderators to Attendees.
  - For Webinars, it is recommended to leave Disable File Download unchecked. This will allow guests to download any Meeting Files, like handouts or forms.
- Click the Add Guest button to add an Attendee.

- o Click the **Add Host** button to add an additional speaker or presenter.
- o Users added with this button get the **Moderator** permission by default.
- o The Moderator Permission should only be given to Attendees to use Host features:
  - ▪ Start Recording
  - ▪ Kick Users
- Type a user's Name and Email Address.
- Select the user's Permissions:
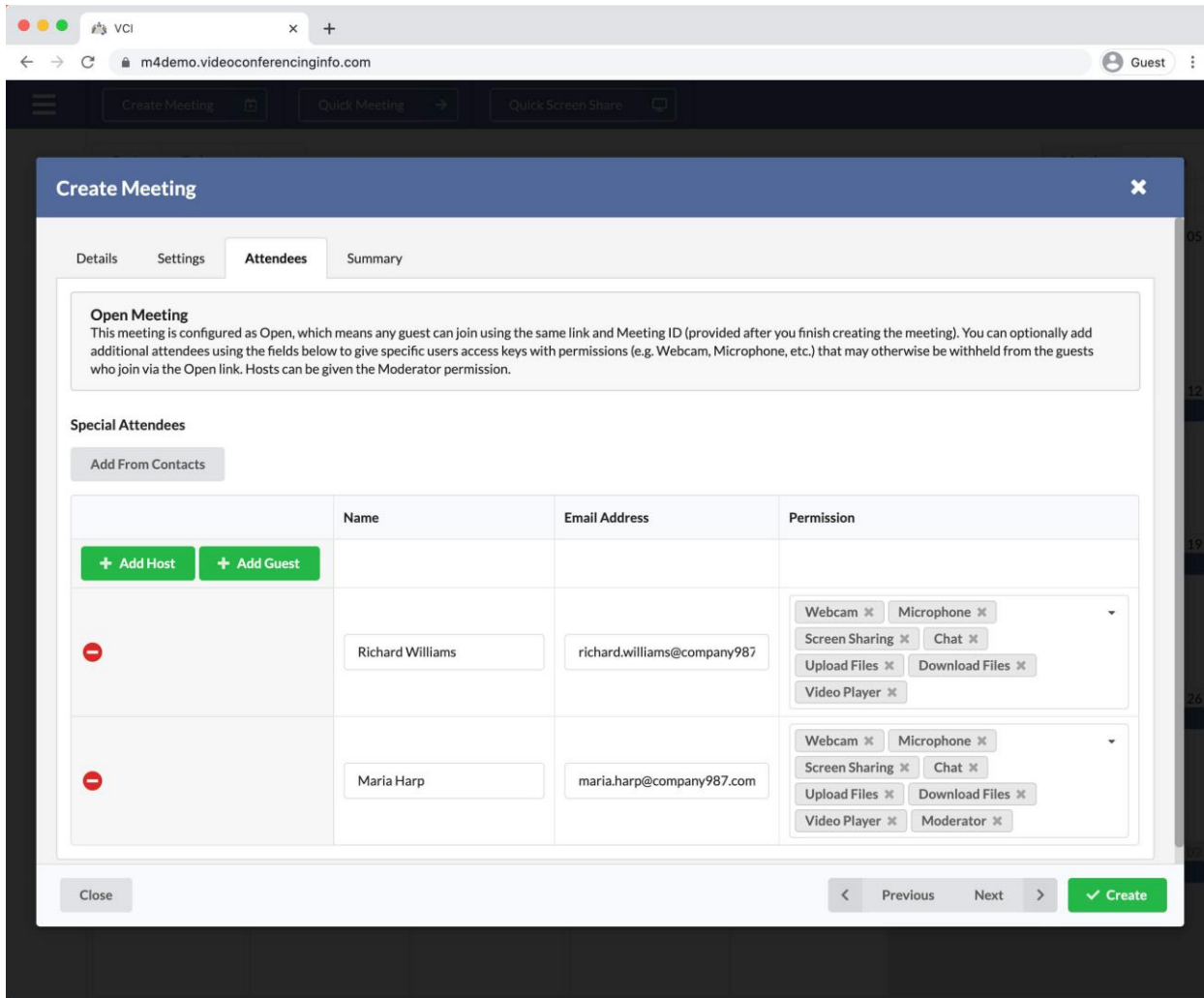
- Click the **Next** button to go to the Summary page or...
- Click **Create** to finish setting up your meeting.
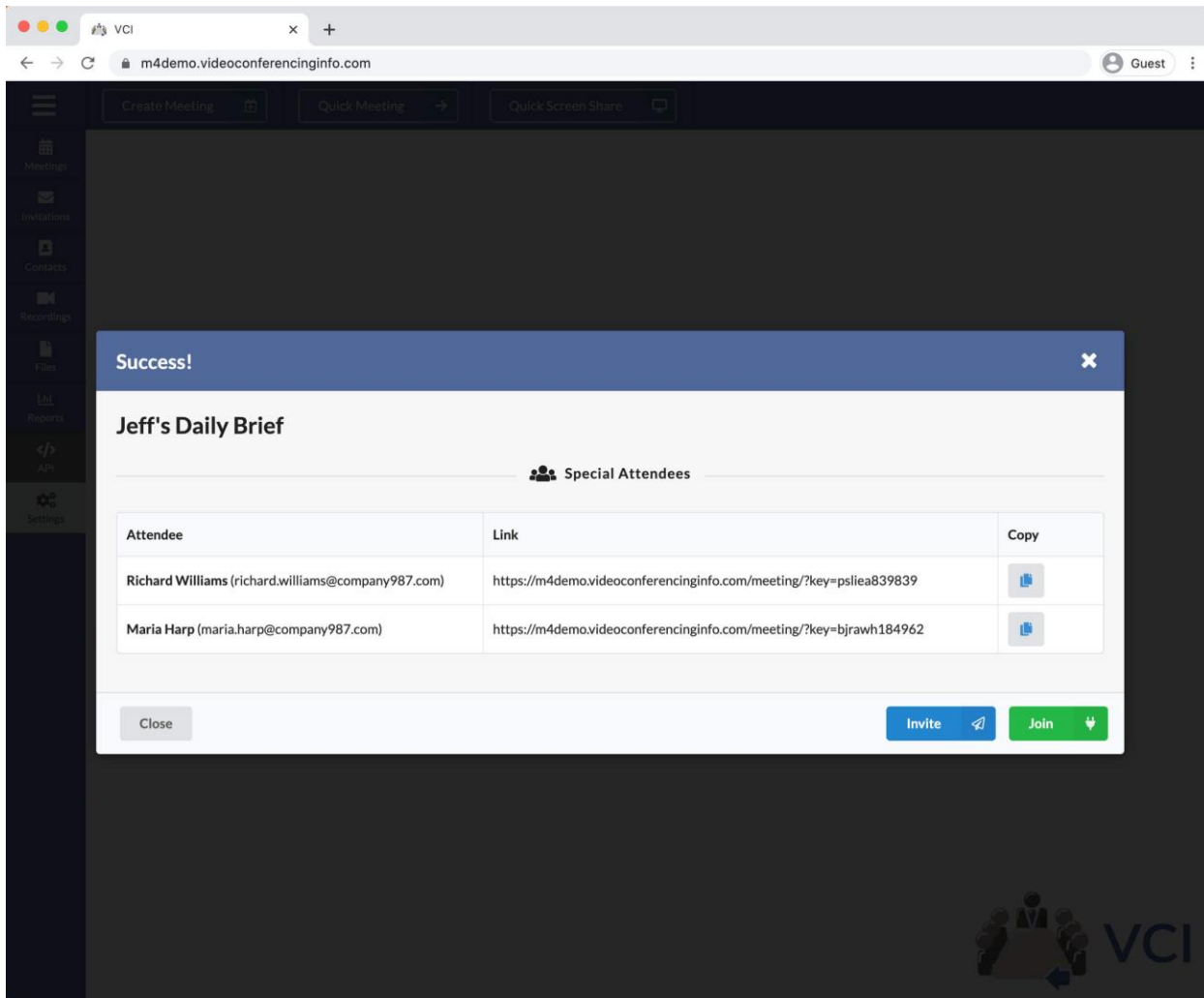
- Click the **Invite** button to send Invitations to your Video Conference or Webinar.
  - Jump to Invitations.
- Click **Join** to Join your meeting now. Enter your name on the next screen.
  - Jump to Join Meeting.

Edit Meeting

The Edit Meeting feature allows you to makes changes to an existing meeting. You can change the Meeting Name, Date/Time, Advanced Settings, and the list of Attendees.

- Details:
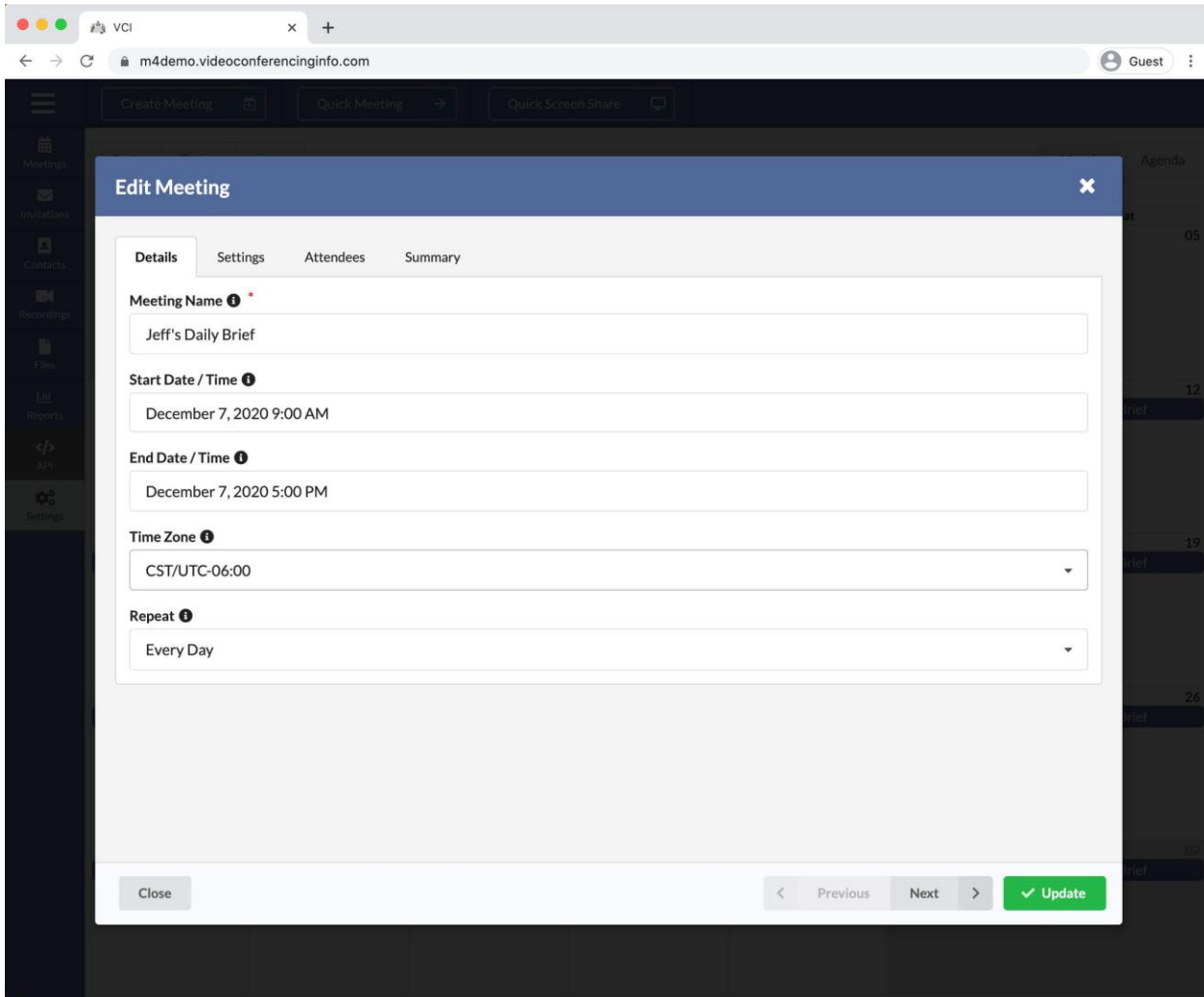
- Settings:
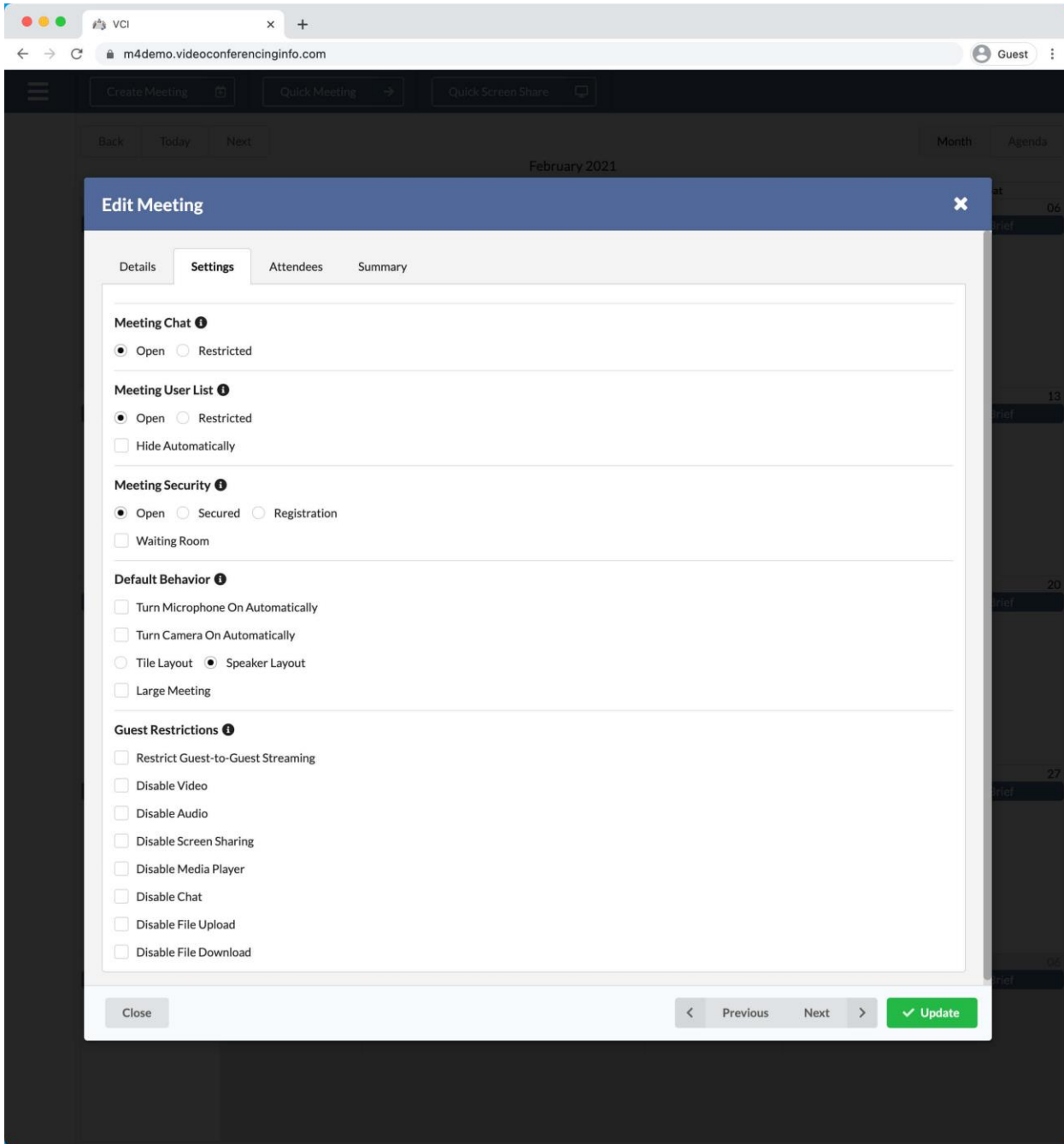
- Attendees:
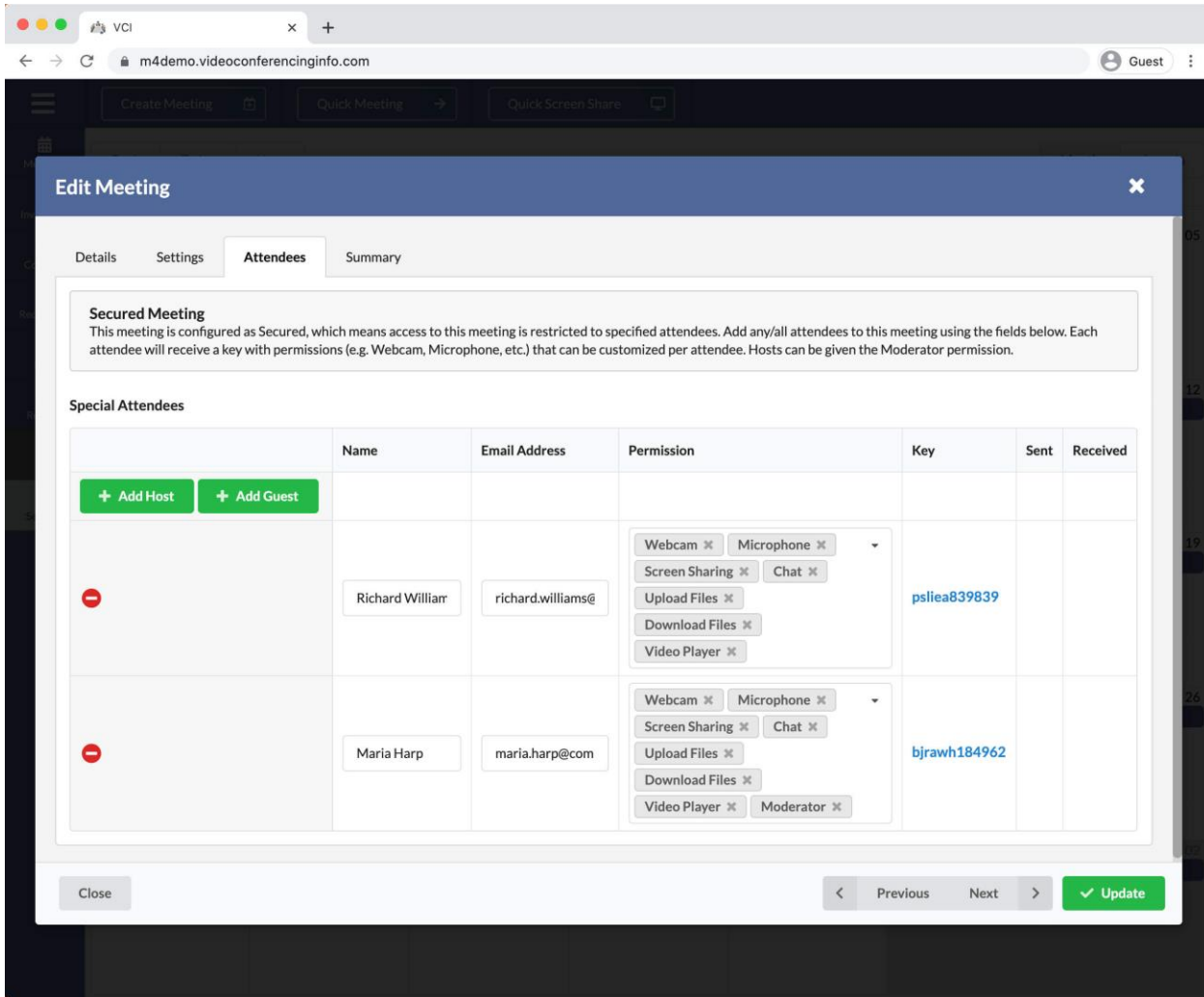
- Click **Update** to confirm your changes.
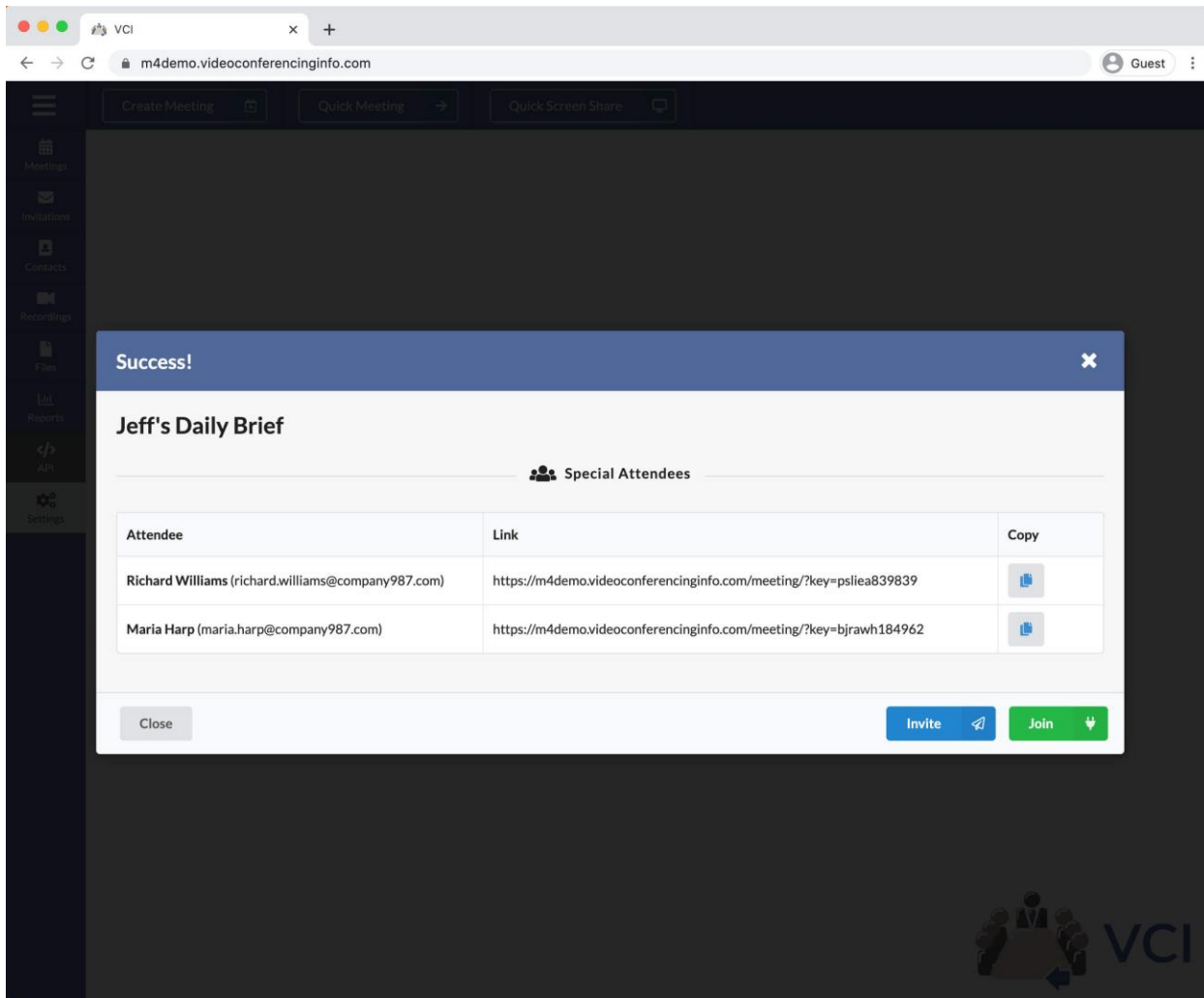
Join Meeting

The Join Meeting feature allows you to instantly connect to the live meeting room from here with Host privileges.

- Click on a meeting from the calendar or Meetings list.
- Then click **Join**.
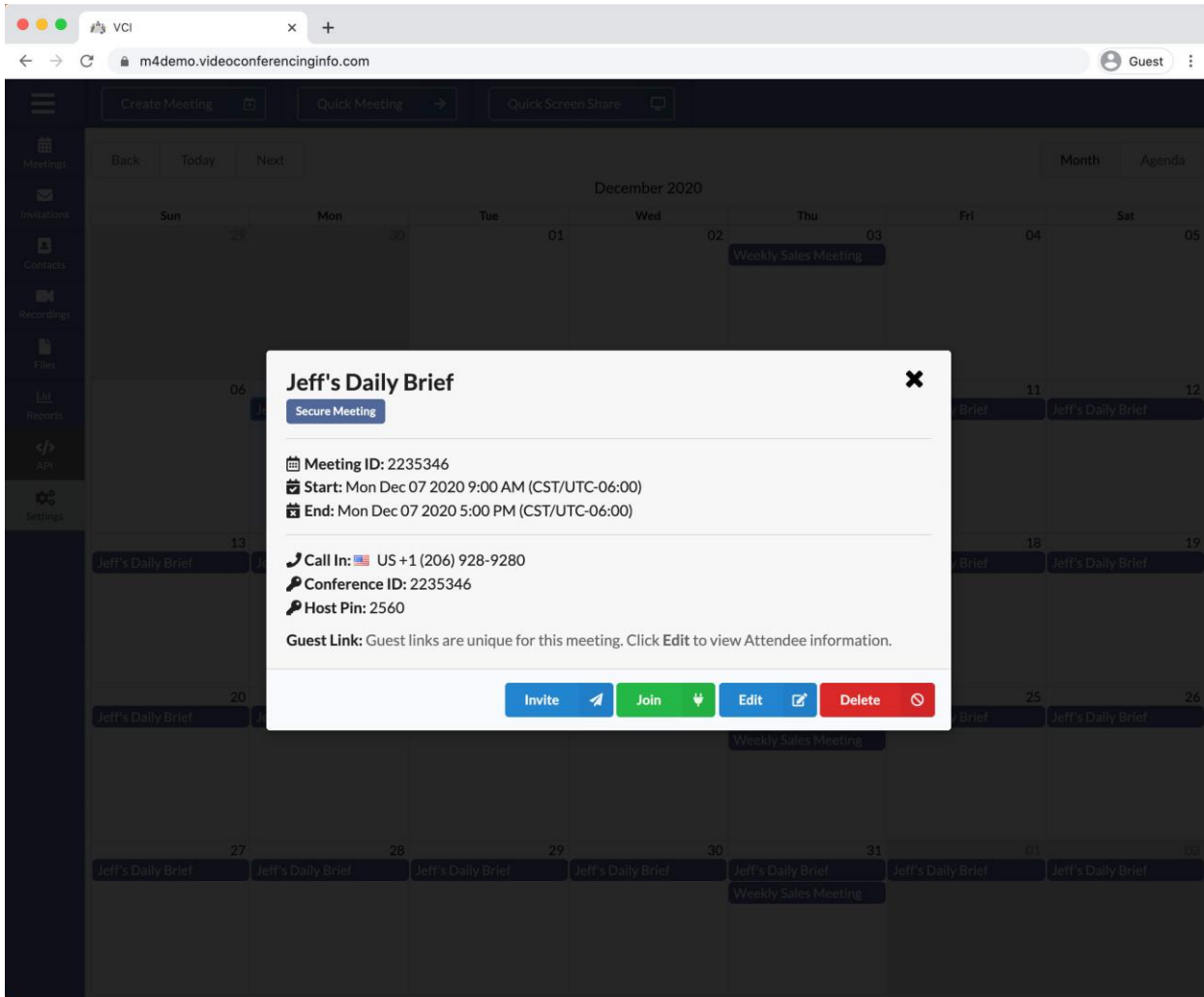
- Enter your name and click **Go**.
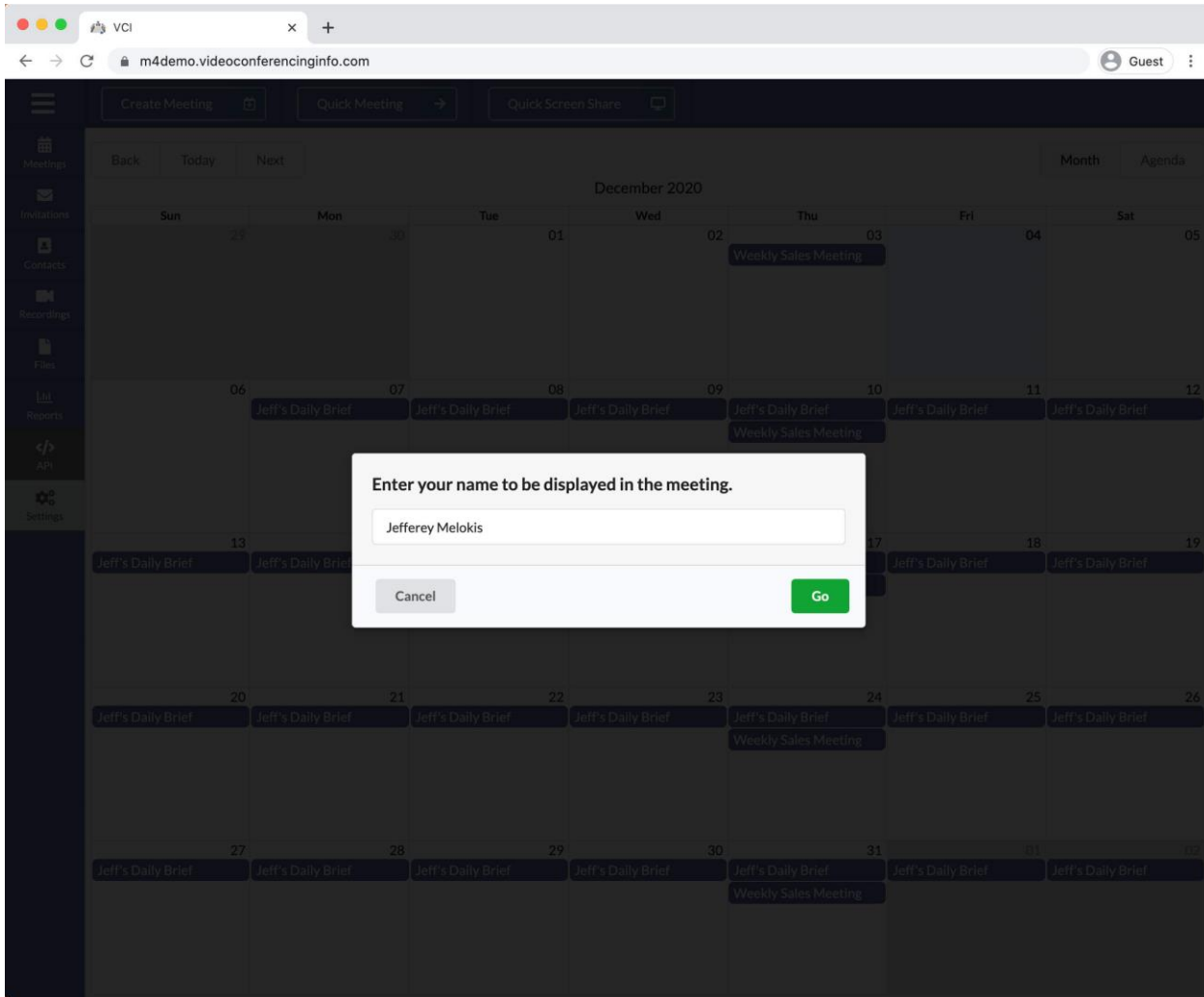
- Allow the camera and microphone access to your web browser.
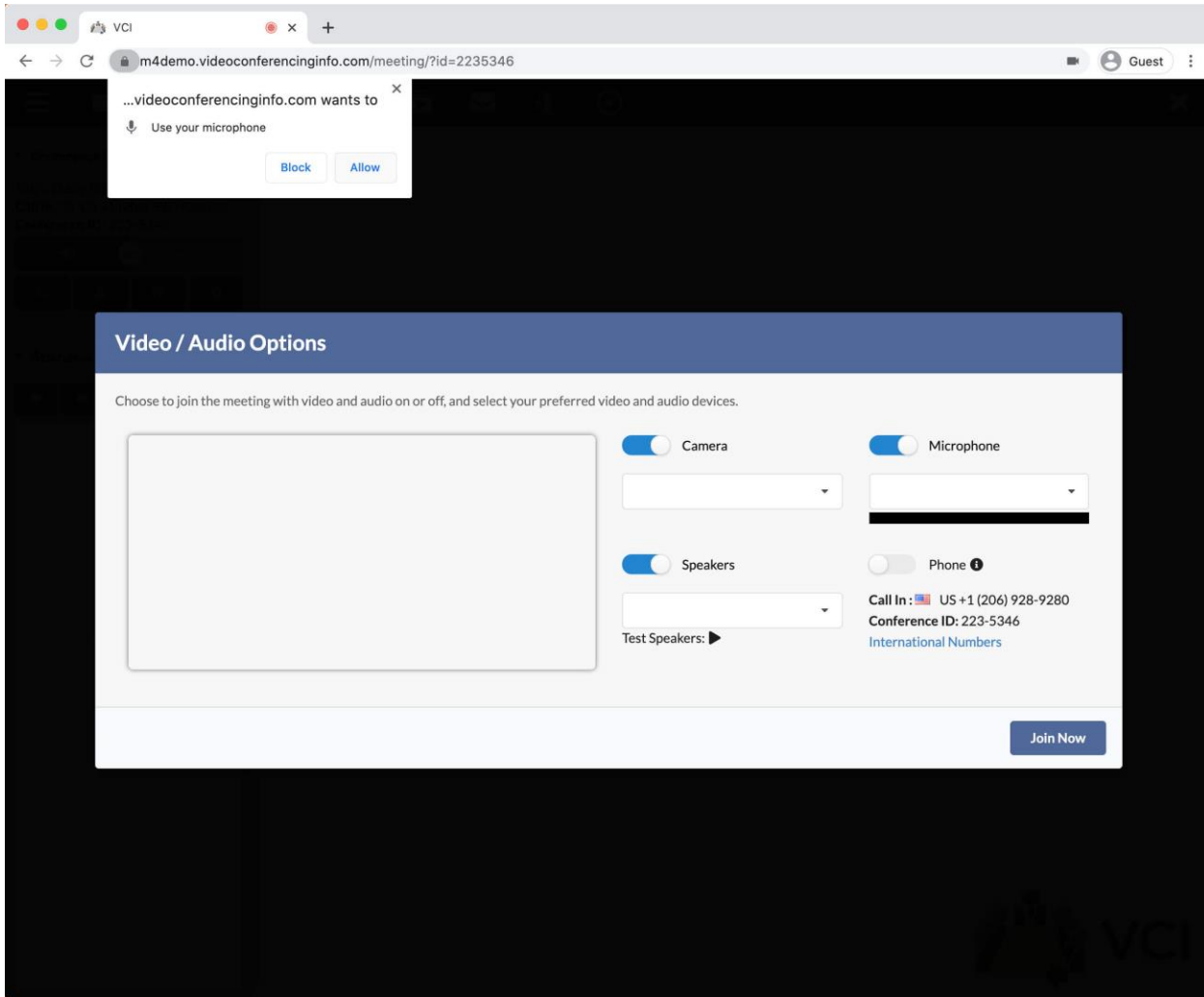
- Preview and select the correct hardware.
- Click **Join Now** to load the meeting.
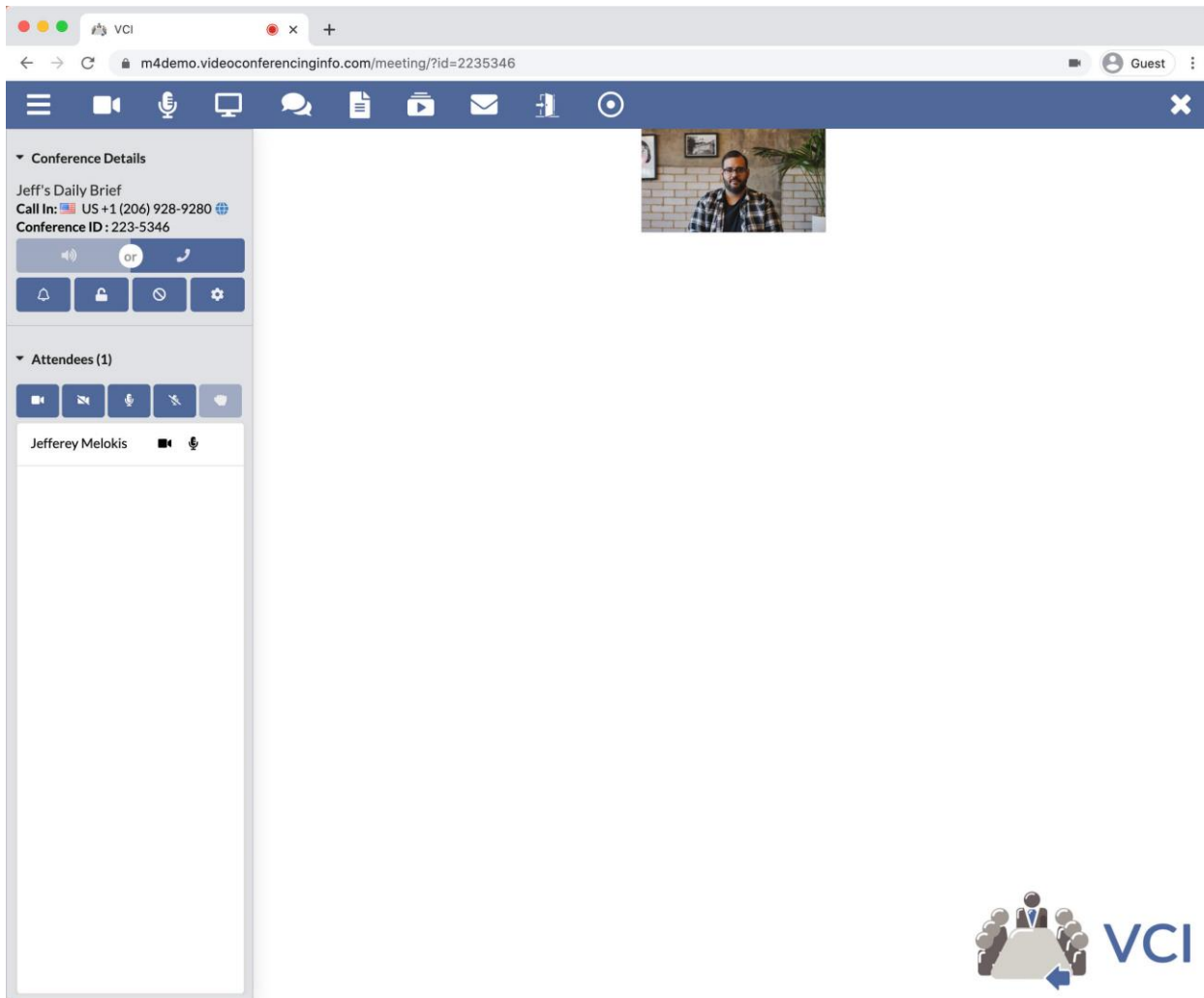
Delete Meeting

The Delete Meeting feature allows you to end a particular meeting and prevent further access.

Once deleted, the meeting and all associated access keys and links are erased and cannot be recovered.

- Once deleted, the meeting's name can be reused for another meeting.
- **Note:** It is highly recommended that you delete meetings that are no longer in use to prevent unintended usage on your account.
- Select a meeting from the calendar or Meetings list and click **Delete**.
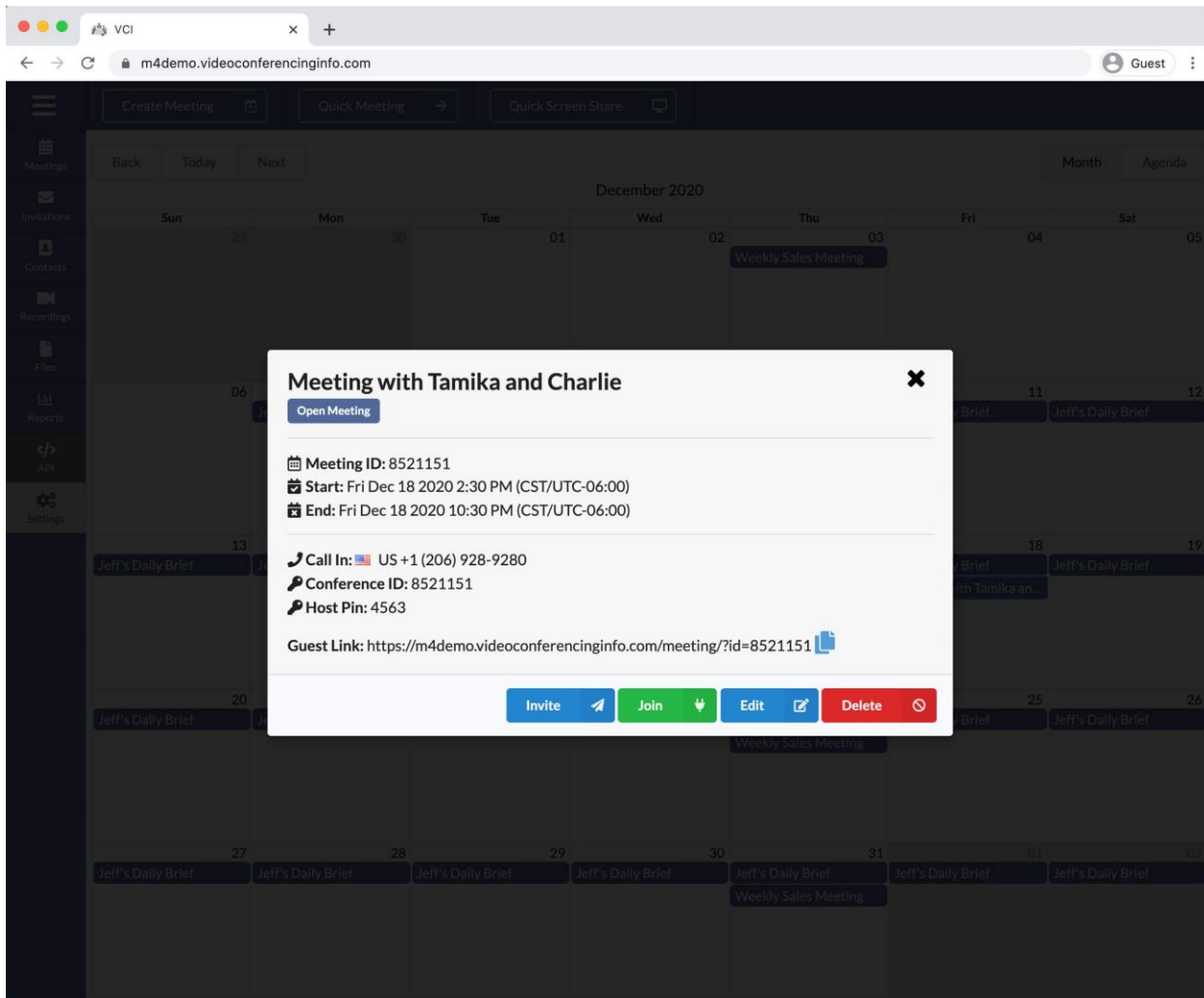
- Click **End** on the next screen to confirm deletion.
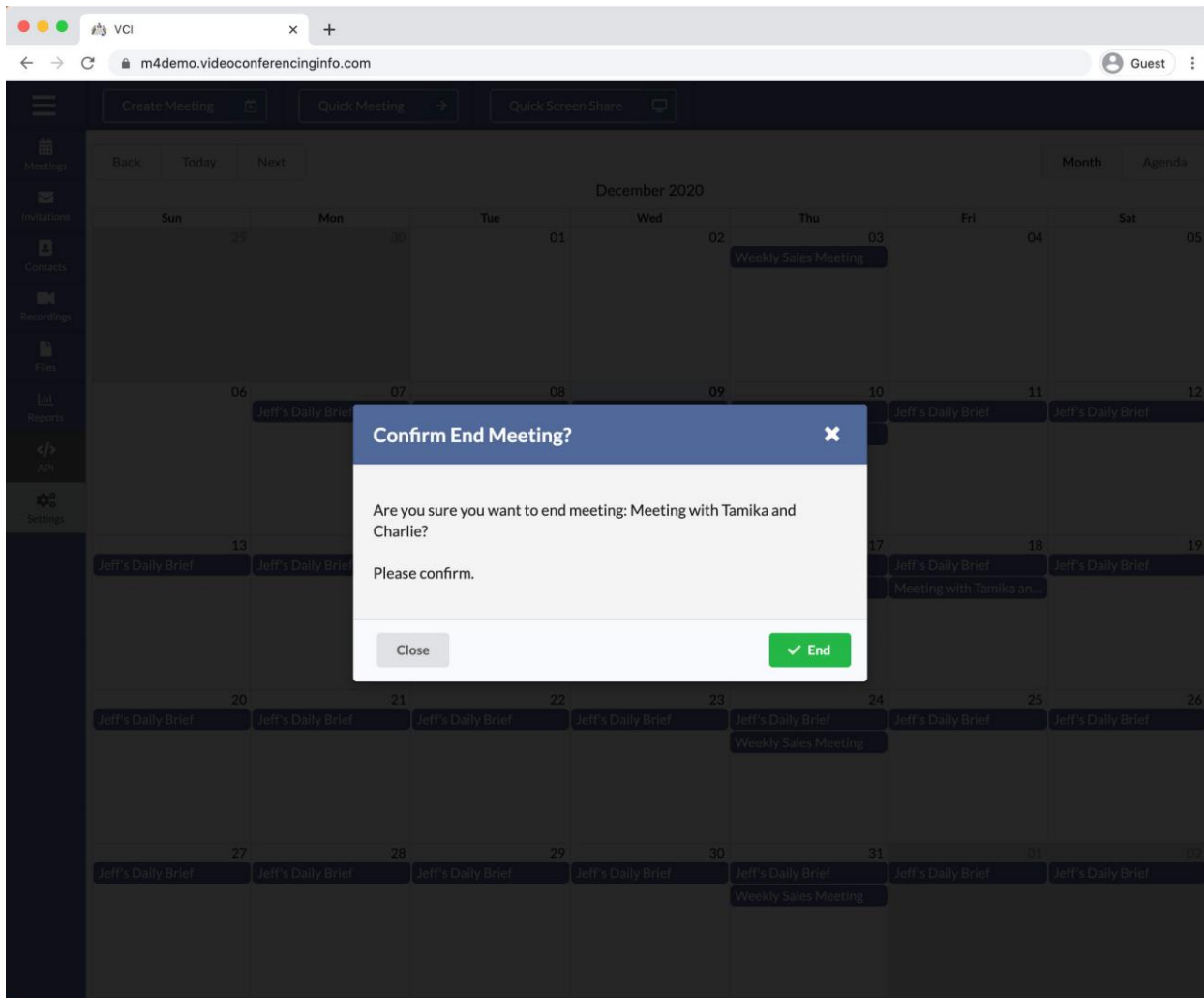
INVITATIONS

Owner/Admin/Host

Send your participants an email invitation, calendar event, or text with your meeting link and/or information.

Open Meetings: Email or text your meeting link to your participants.

- **Secure Meetings:** Email each user their own unique link.
- **Open Webinars:** Email or text your webinar link to your participants.
- **Webinars with Registration:** Email or text the registration link to your participants.
- **Open Meetings with Special Attendees & Webinars with Special Attendees:** Email or text your open link to your participants. Email secure links to the Special Attendees.
- Click on **Invitations** from the panel on the left of your Account Dashboard.
- Select a meeting from the drop down menu.
- If you have just finished creating a meeting, then it will already be selected in the drop down menu.
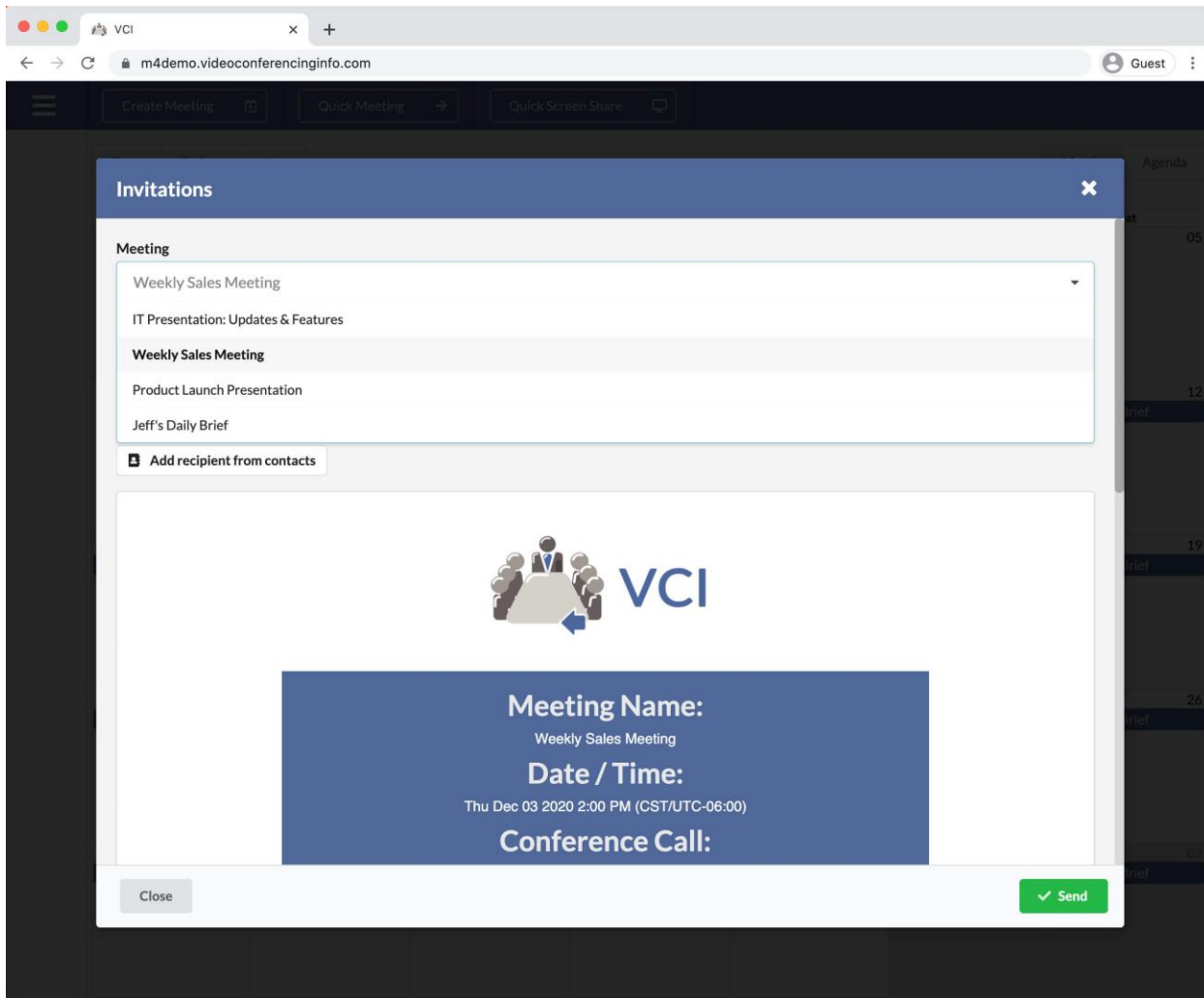
- **Open Meetings:** Send either email invitations or text your meeting link.
  - o Enter email addresses of your participants.
    - ▪ Separate email addresses with a comma.
 - o Click **Send**.
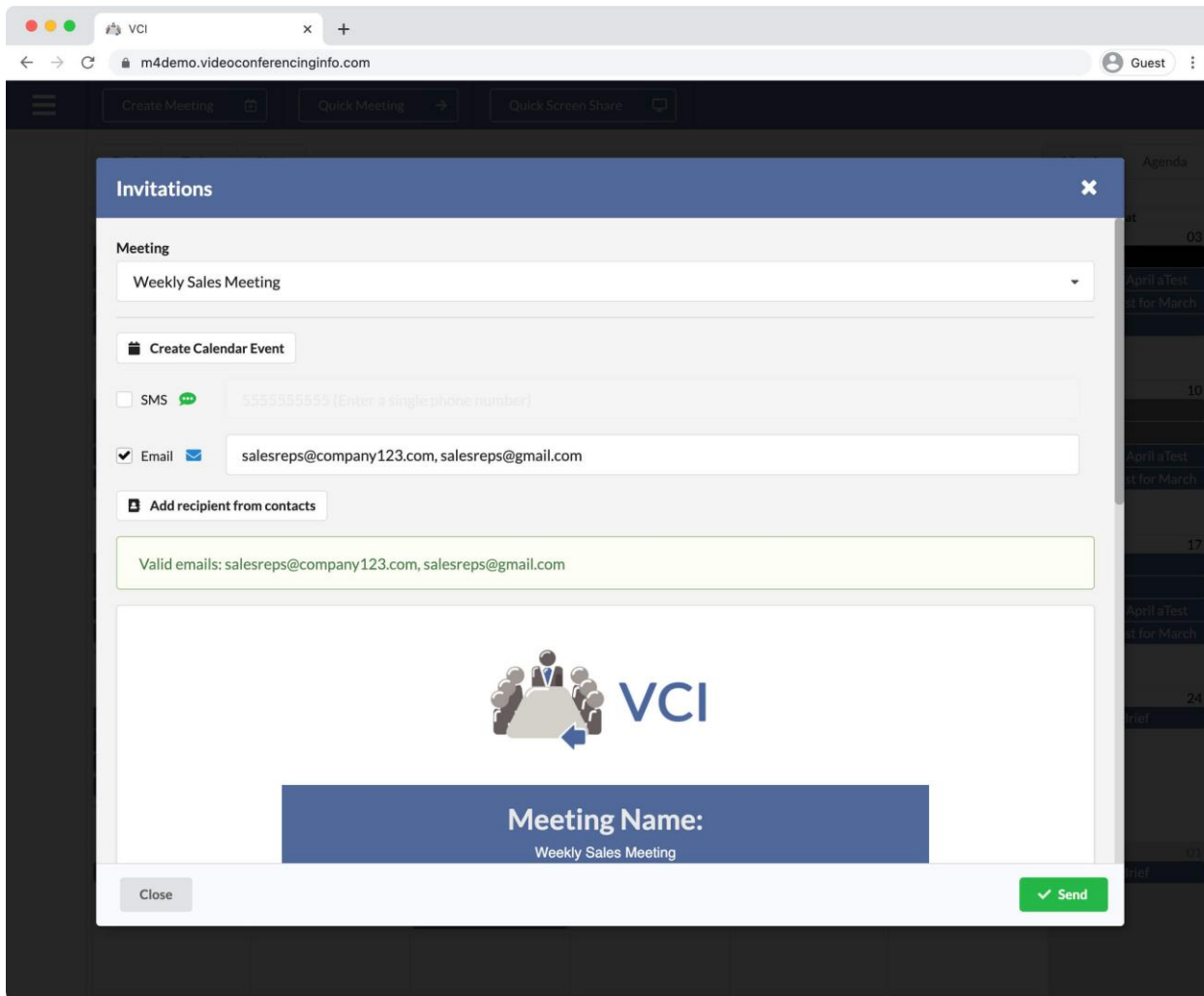
- **SMS:** Send a text to your participant.
  - Texts can only be sent one to Open Meetings.
  - Texts can only be sent to one participant at a time.
  - Enter the cell phone number of your participant and click **Send.**
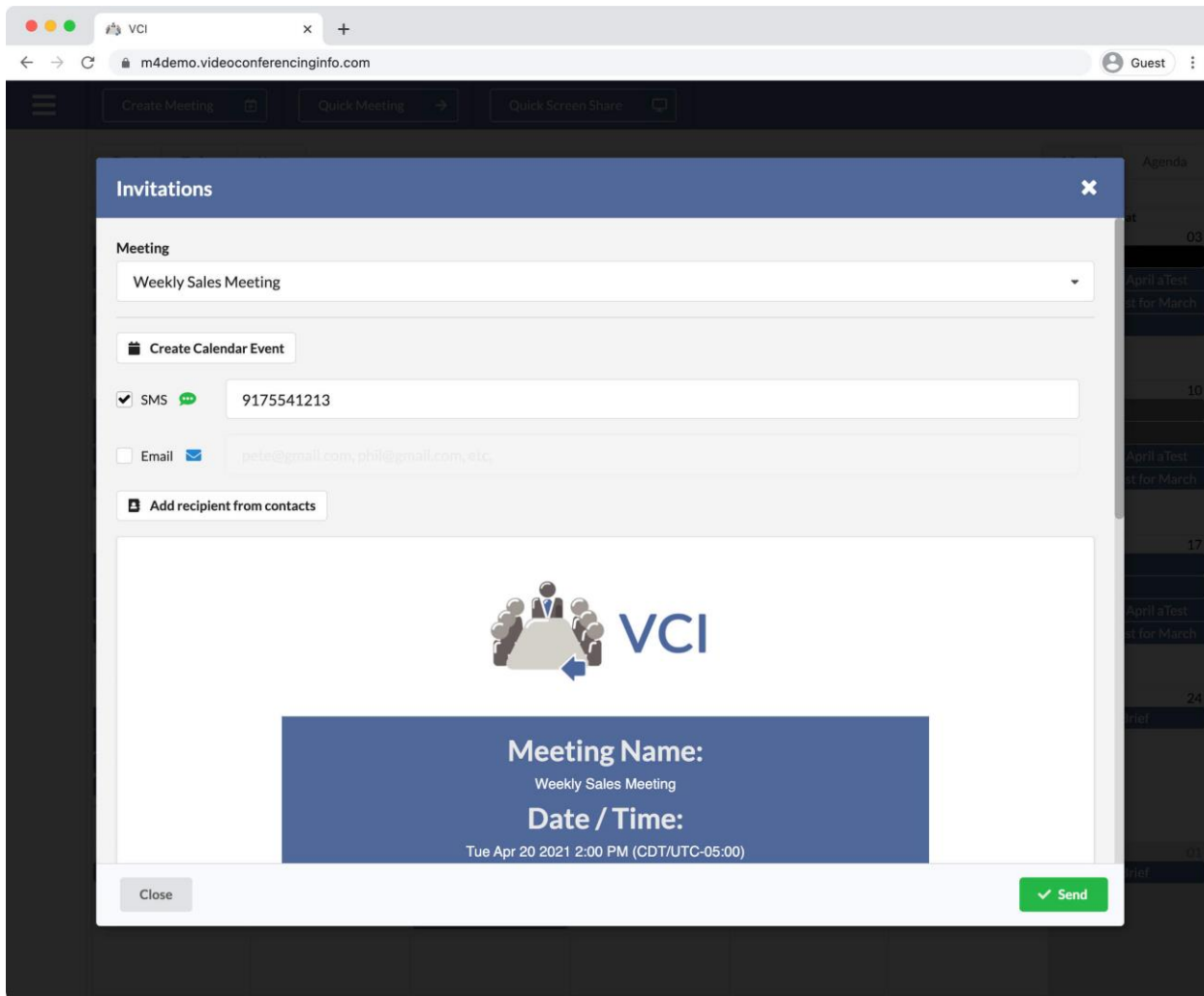
- **Secure Meetings:** Attendees receive the invitation with their access key.
  - You'll see the list of users who have been added to your meeting listed in the Invitations window.
  - Remove users if necessary.
  - Click **Send.**
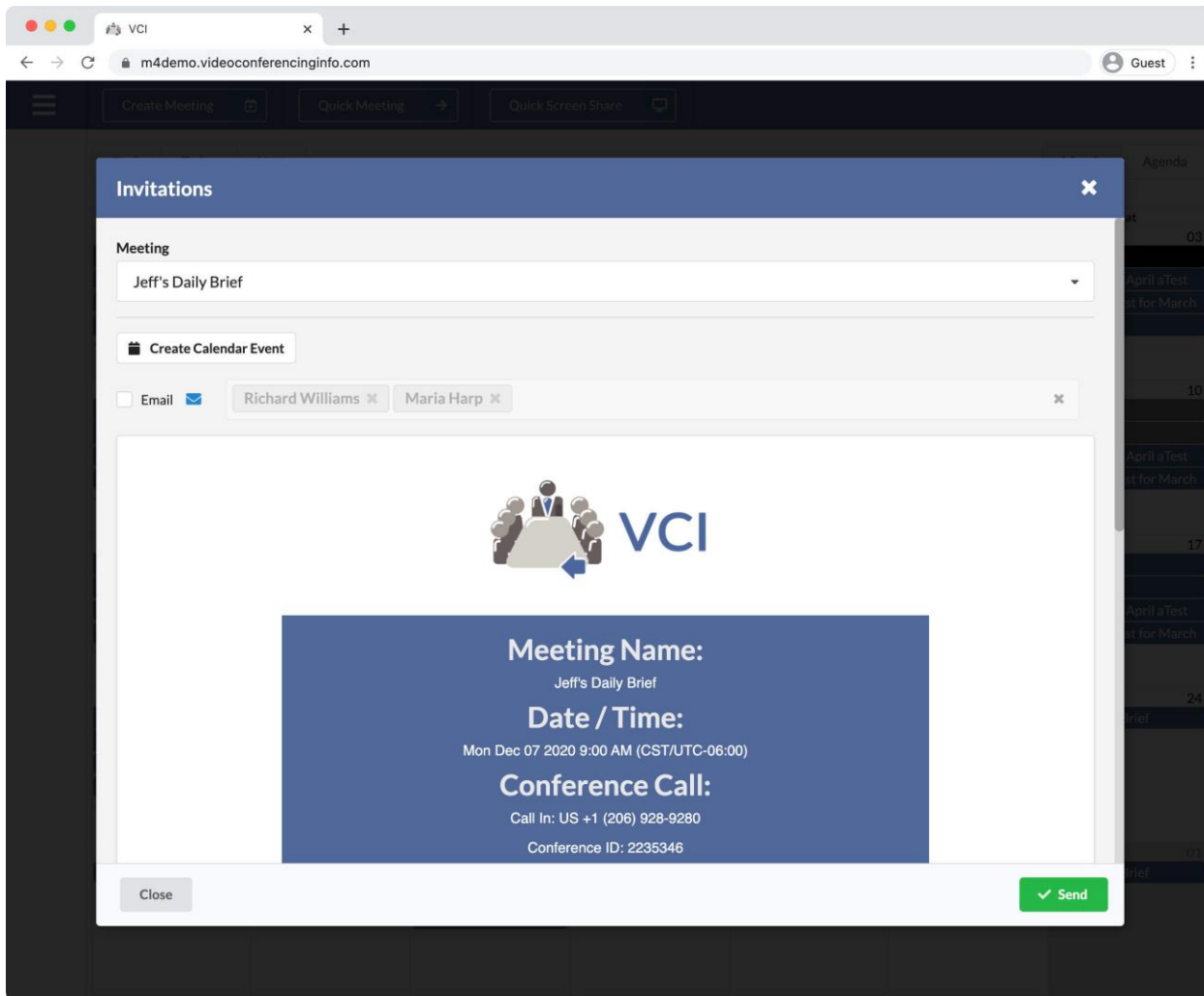
- **Webinars with Registration:** Send your webinar audience a link to the Registration page.
  - o Enter their email addresses and click **Send.**
  - o Separate email addresses with a comma.
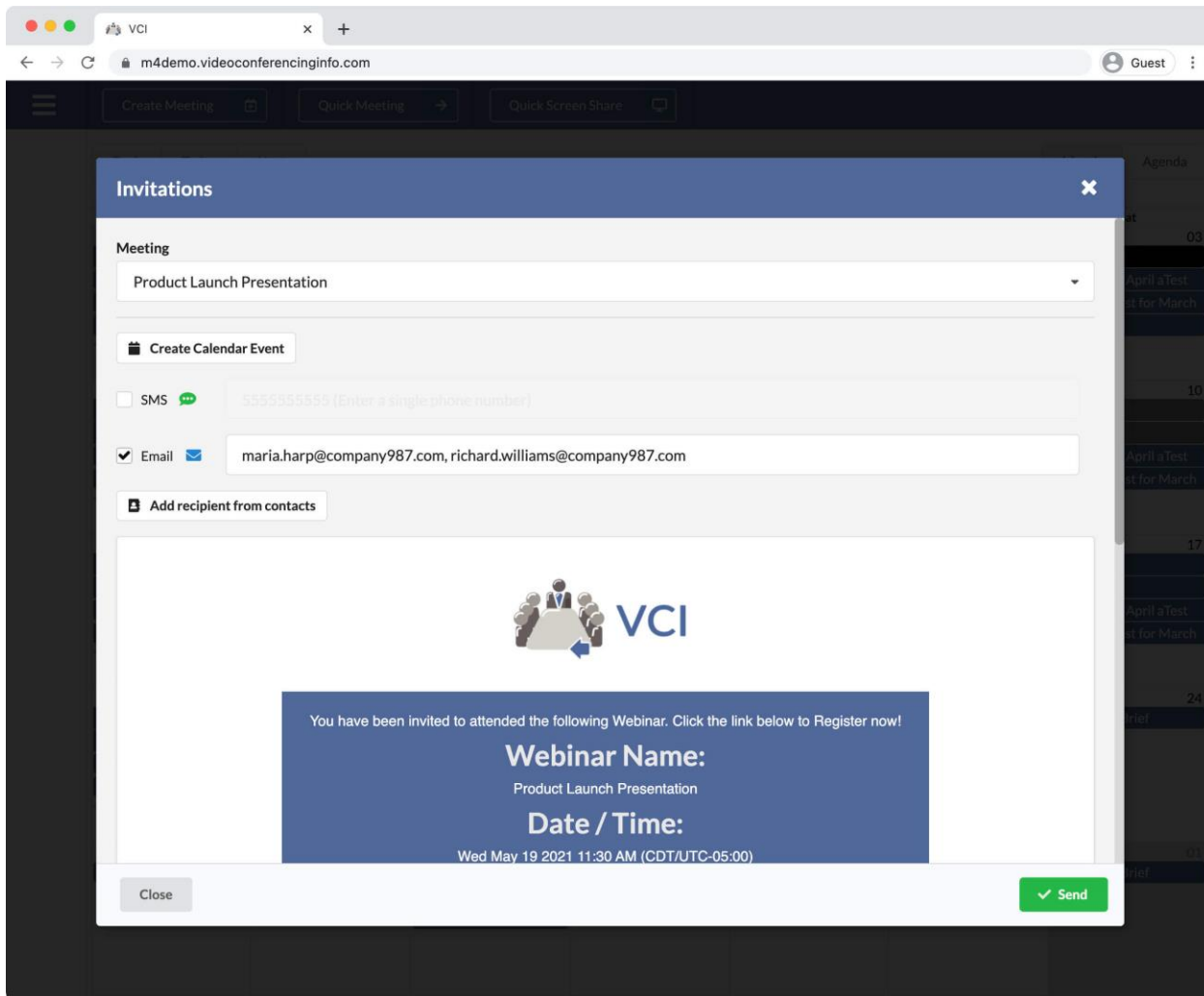
[Create Calendar Events](#)

- **Calendar Events:** Send your participants a Calendar Event using your Outlook or Google Calendar.
- Click on Create Calendar Event to open the details window.
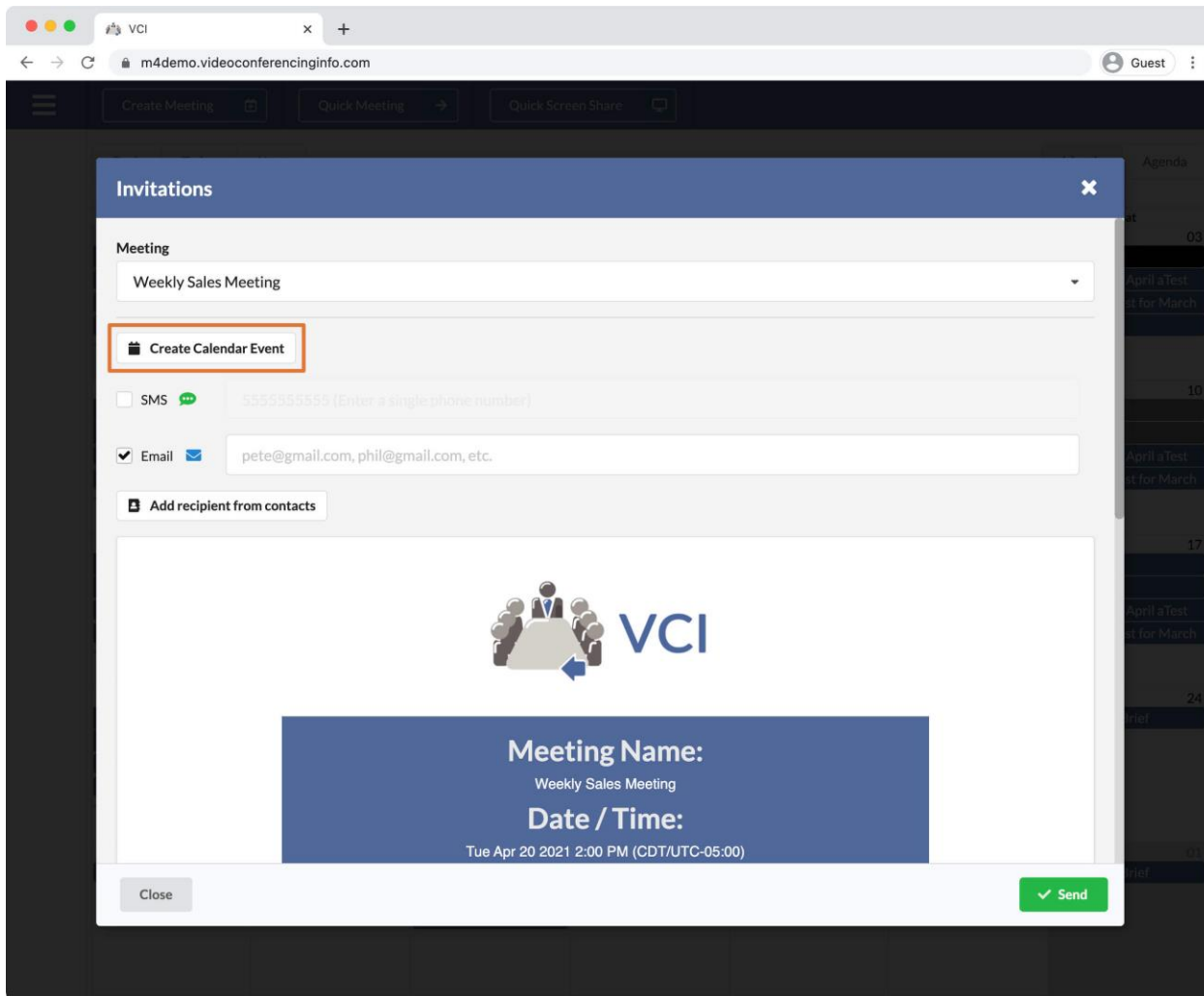
- **Title:** Defaults to the meeting name. This is the title of the calendar event.
- **Start:** Date and time the event will start on your recipients' calendars.
- **End:** Date and time the event will end on your recipients' calendars.
- **Description:** The body of the calendar event. For Open Meetings, the meeting link is included by default. For secured meetings, it is recommended not to include sensitive details such as a user's key, so each link is not included.
- **To:** Enter the email addresses of your participants.
- **Add to Outlook:** Opens a new window where you can log into your Microsoft Outlook Calendar (if not already logged in). Use Outlook's interface to complete sending the calendar event.
- **Add to Google:** Opens a new window where you can log into your Google Calendar (if not already logged in). Use Google's interface to complete sending the calendar event.
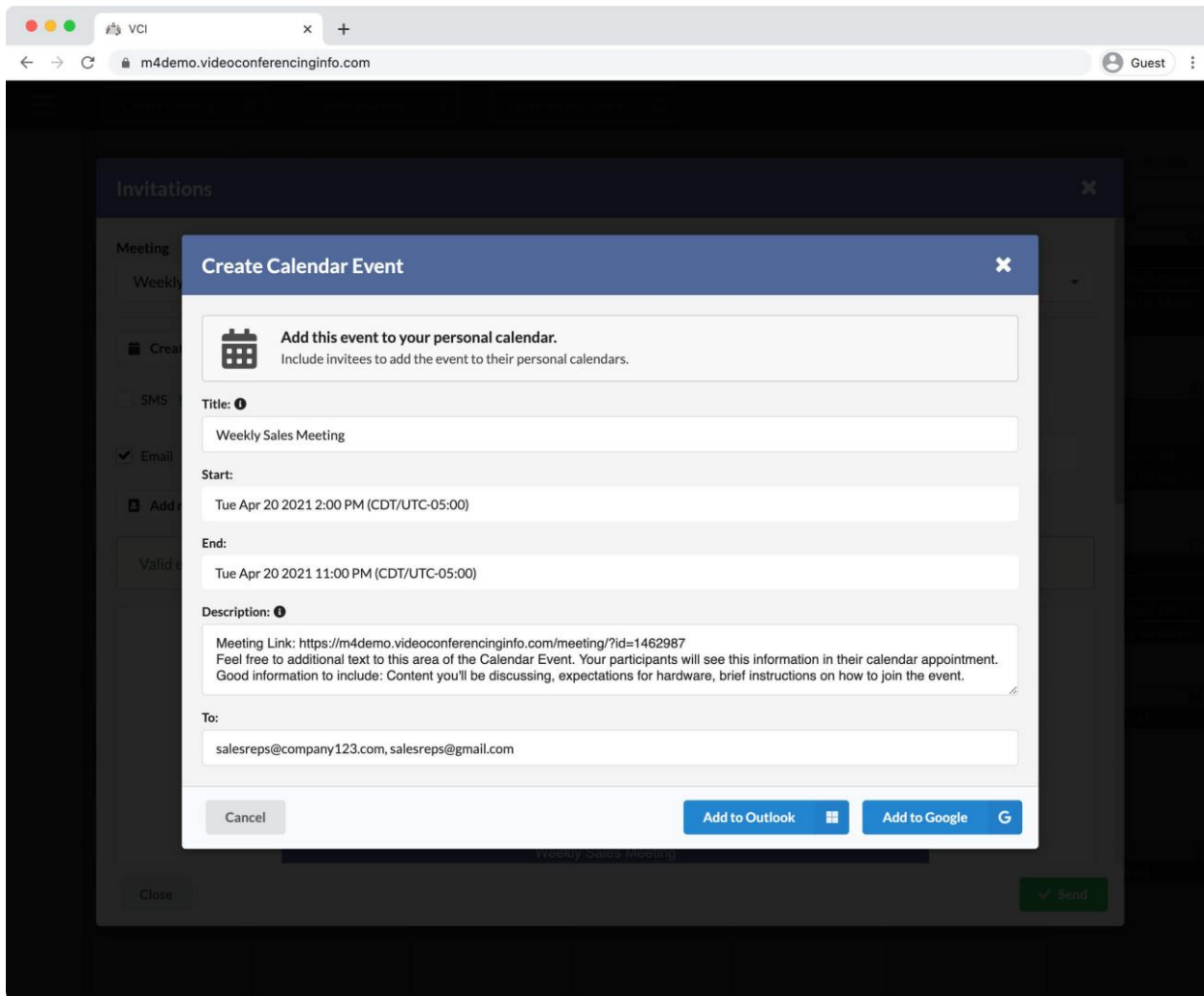
RECORDINGS

Owner/Admin/Host

The Recordings section shows you a list of previously recorded Meetings and Webinars.

Click on **Recordings** on the left side of your Account Dashboard.

- o The **Owner** and **Admins** on the account have access to all recordings.
- o **Hosts** have access only to their own recordings.

- Select a recording from the list:
  - **Request Download/Playback:** Click Request to retrieve your recording.
    - This step is required before accessing any recordings.
    - Check back after a few minutes to see the process of your request.
    - Once the recording has been processed, additional buttons to download and play your recording will appear.

- **Play:** Opens the recording in your web browser so that you can view it immediately.
- **Download:** Download an MP4 file of your recording to your computer.
- **Copy:** Copy either the Download or Playback Links to share with other people.
- **Delete:** Delete the recording (cannot be undone).
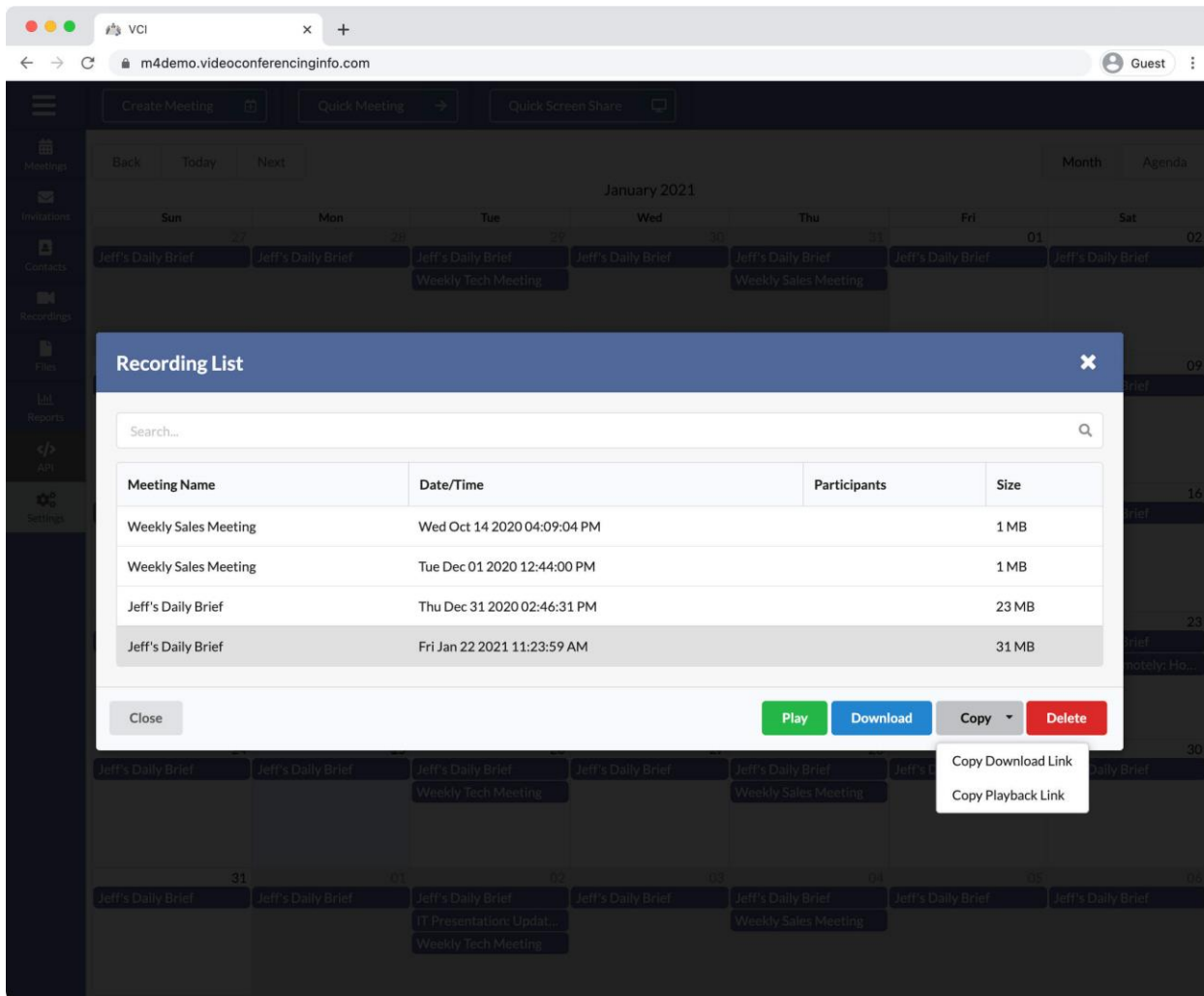
REPORTS

Owner/Admin/Host

The Reports section allows you retrieve account data.

Click on the Reports icon on the panel in your Account Dashboard.

- **Usage Report:** Find out historical data about meetings. You'll be able to see who joined meetings, what times they joined and left, and information about their connection.
- **Invitation History:** Find out the status of your Email Invitations.
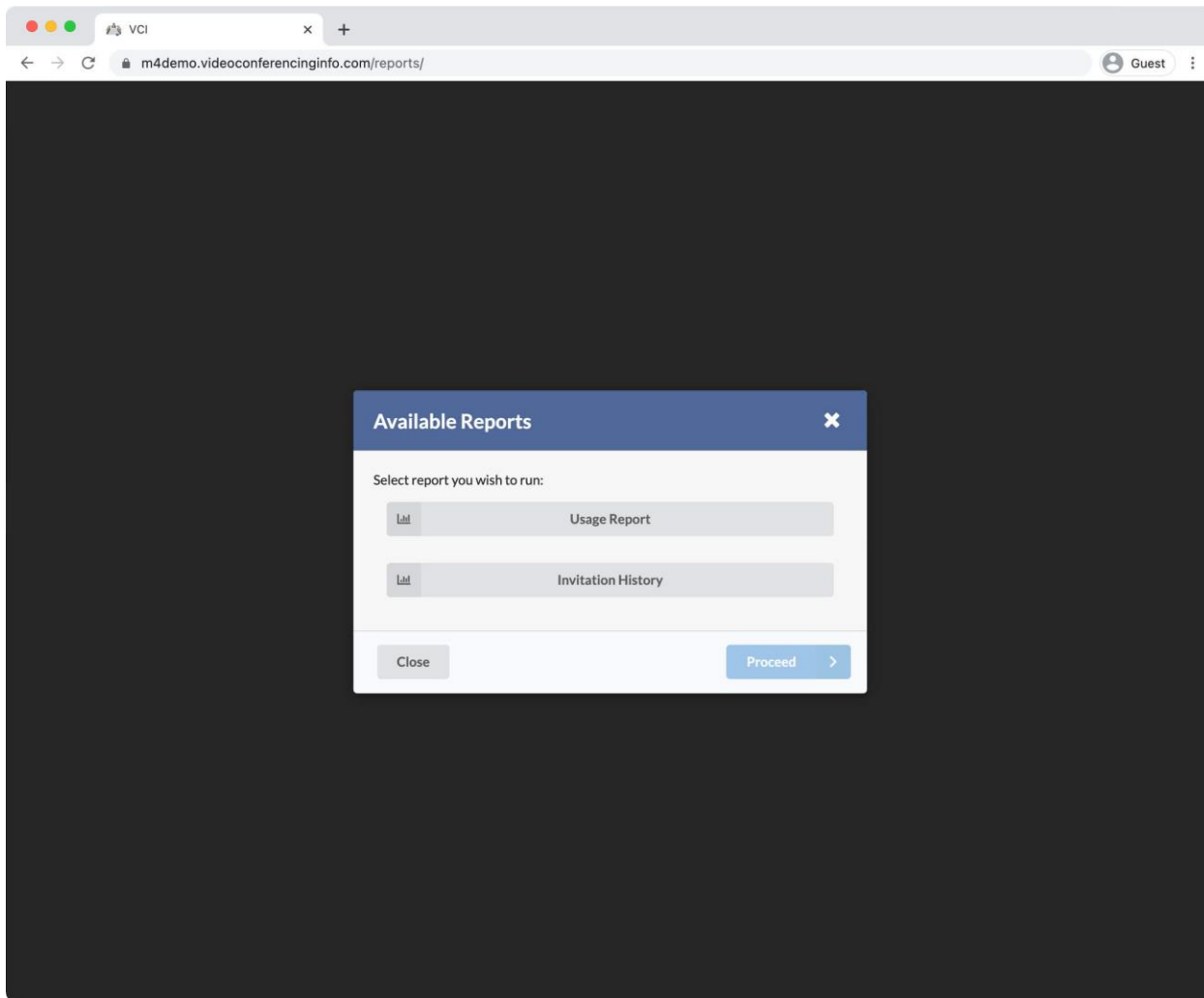
Usage Report

- **Filter by Date Range:** Select from presets like "this week" and "last week" or select a custom date range.
- **Filter by Login:** Owners and Admins will be able to filter results by particular logins on the account.
- **Filter by Status:** Filter between active and inactive meetings. If you're unsure, select **Both.**
- **Select Meeting(s):** Choose one or a several meetings from the list to narrow your search.
  - o **Select all meetings:** Check to see data for all meetings on your account.
- **Run Report:** Click the **Show Meeting Usage** button to see your results.

- When you have your results, you can either export to CSV or PDF files.

Invitation History

- **Filter by Date Range:** Select from presets like "this week" and "last week" or select a custom date range.
- **Filter by Delivery Status:** Choose between Delivered Invitations and Bounced and Pending Invitations. Select **Both** to combine your results
- **Run Report:** Click the **Show Invitations History** button to see your results.

FILES

Role: Owner/Admin/Host

The Files section allows you upload and manage documents and files for use during meetings and sharing with meeting participants.

- Click on the Files icon on the panel in your Account Dashboard.
- Select a file from the list to:
  - **Delete:** Deletes the file and cannot be undone.
  - **Share:** Allow specific people to have access to your file or share it with an entire meeting. When shared with a meeting, the file will appear in the **Meeting Files** list for that meeting and all participants will have access to the file. When shared with a specific user, the file will appear in that user's **Your Files > Shared With You** folder.
  - **Download:** Download a copy of the file onto your computer.
- Click the **Upload** button to start uploading files to your account.
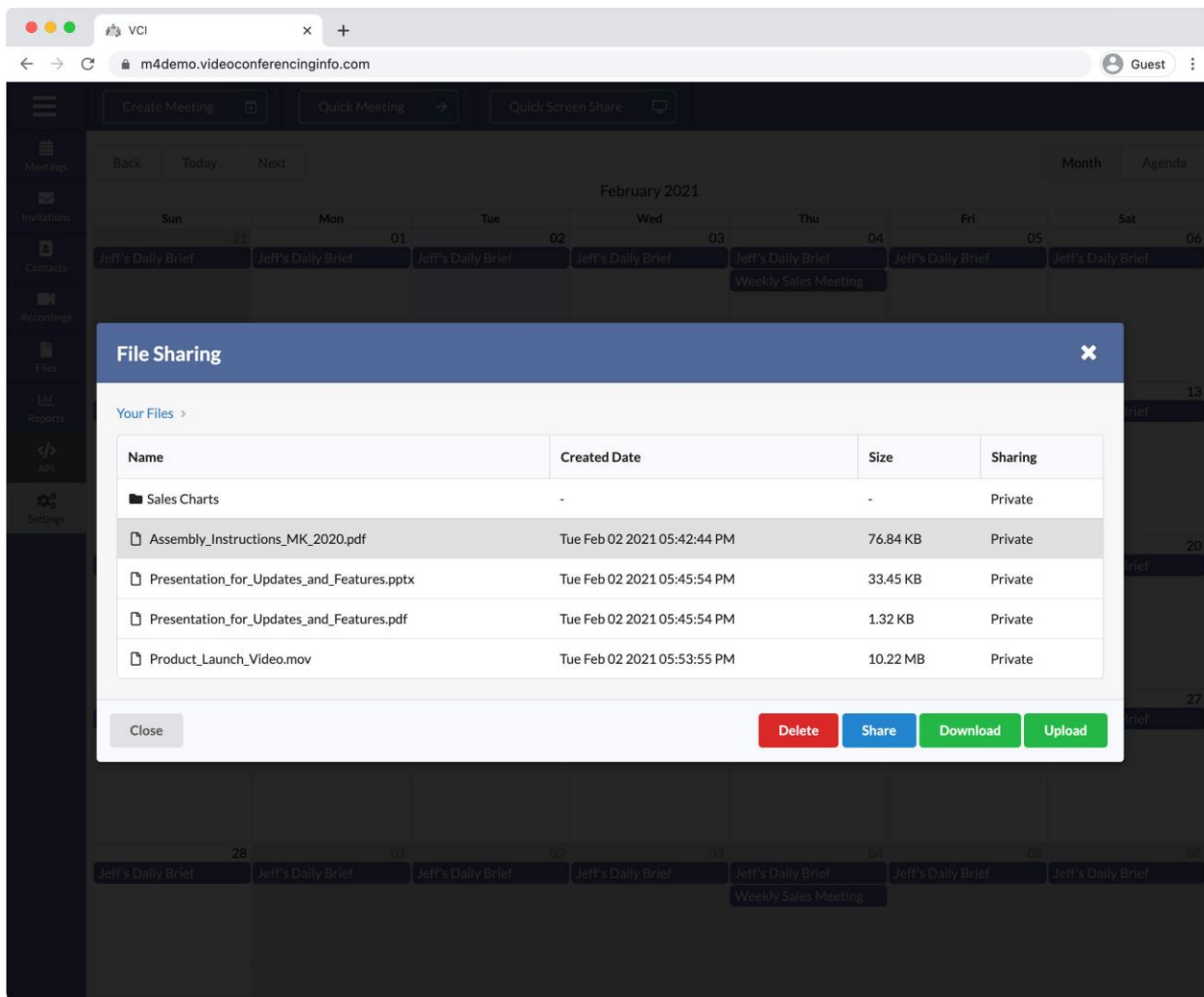
- When Sharing a file, you can choose meetings from the left or individuals on the right.
- Make your selection(s) and click on **Update Sharing**
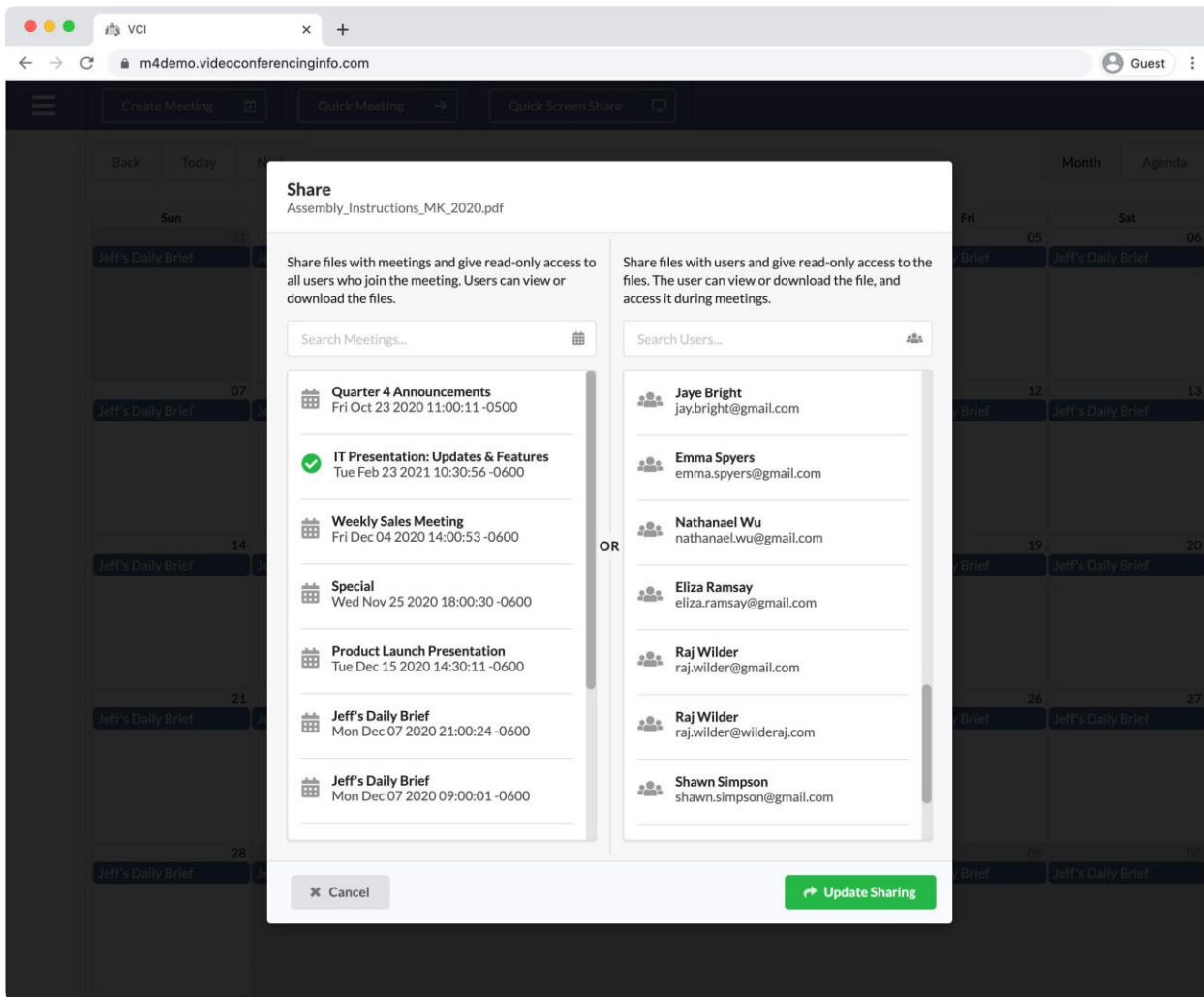
Uploading Files

- How to upload files:
  - You can drag and drop files from your computer onto your browser to get them ready to upload or...
  - Click on the upload icon to browse for files instead.
- **Folder Options:** Click on **Create a New Folder** to upload your file(s) to a new folder.
- Click on **Upload Now** to upload your file(s).
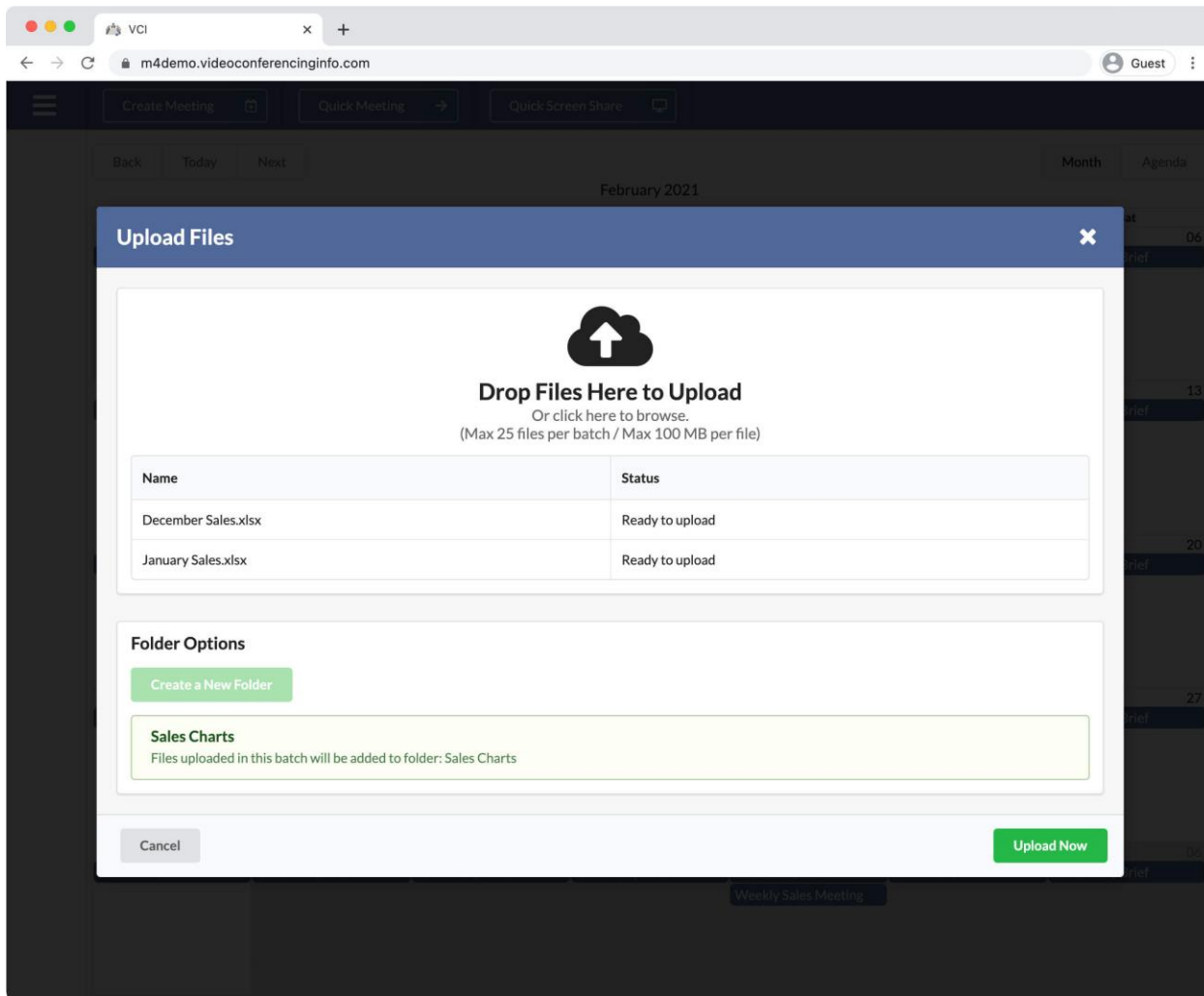
SETTINGS

 Role: Owner/Admin/Host

The Settings section allows you to change basic account details, login details, or branding settings depending on the user and account type.

- **Account Details:** Admins and Hosts can adjust their email address, phone number, and full name.
    - **Email Address:** Used to log into your account.
    - **Phone Number:** Used for internal contact purposes.
    - **Full Name:** Display name that appears in meetings, email invitations, etc.
    - **Meeting Duration:** Set the default duration for a meeting when you create it.
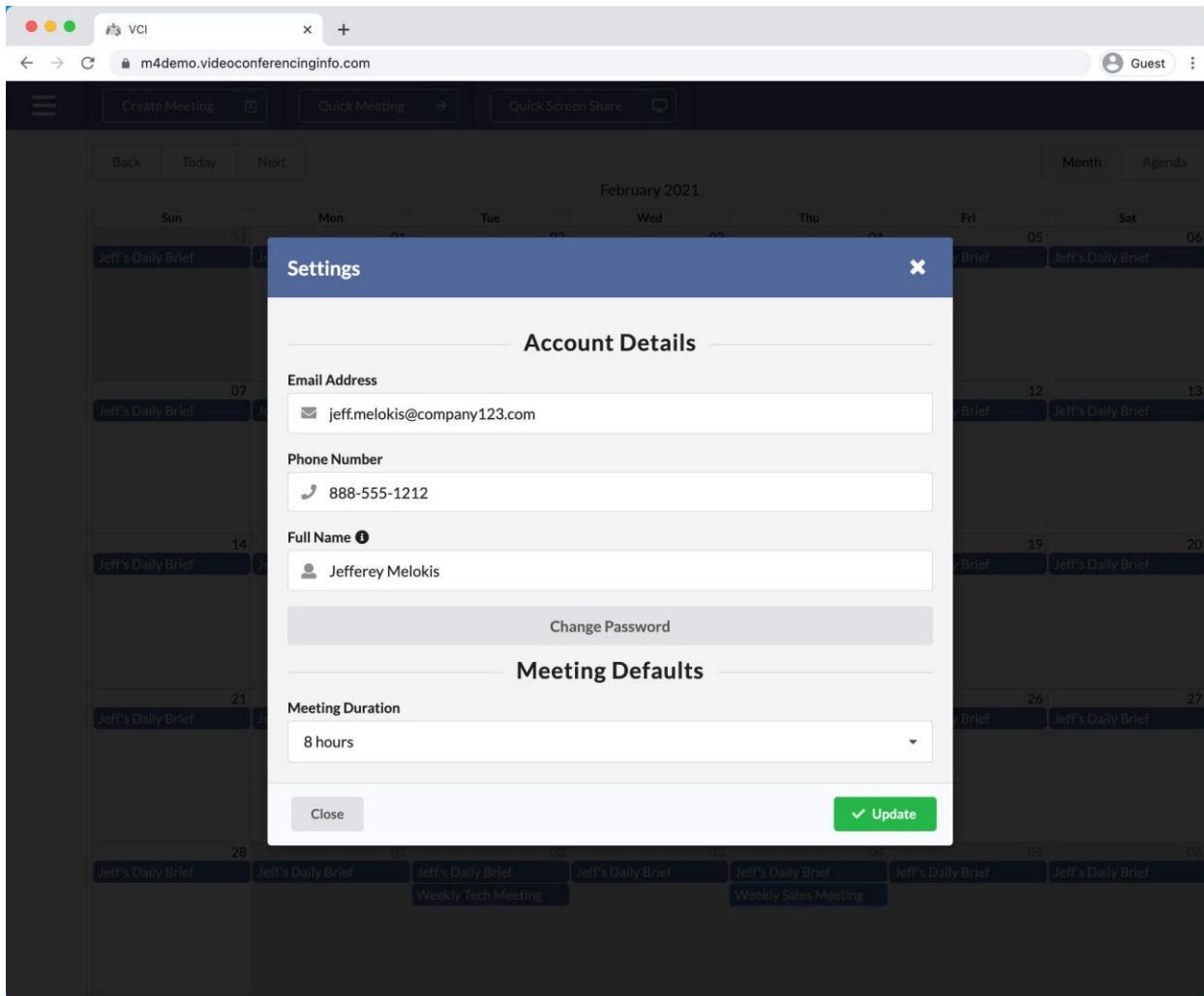
- **Owners** can also add the Company Name and Address.
- **Enterprise Accounts** have additional branding settings.
  - For a full explanation of each branding option, please see branding
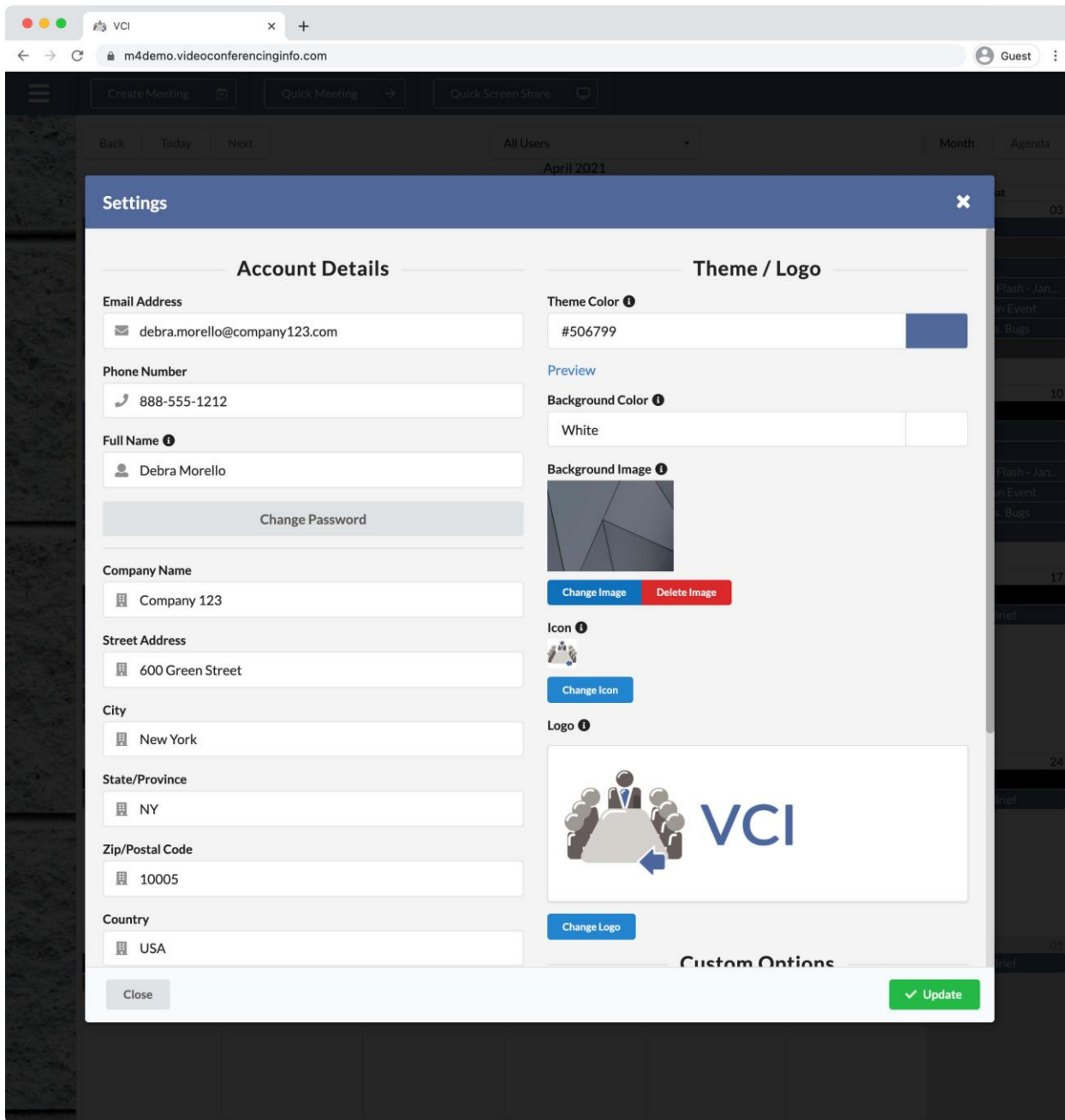
BRANDING (ENTERPRISE ACCOUNTS ONLY)

Your Taqtik Telehealth Enterprise Account begins with standard Taqtik Telehealth branding and is easily re-branded under your own label with a few simple steps. Below, we will cover the stepsto complete a fully White Labeled account.

Browser 1 — m4demo.megameeting.com

HOST LOGIN

Login

Enter your Email Address and Password.

debra.morello@mycompanysite.com

•••••••••••

Forgot Password? Click Here

I have read and agree to the Privacy Policy and Terms of Service.

Login

☐ Remember Me

Guest? Join a Meeting.

MegaMeeting

Browser 2 — phil.livecloudevents.com

HOST LOGIN

Login

Enter your Email Address and Password.

debra.morello@mycompanysite.com

•••••••••••

Forgot Password? Click Here

By submitting this form, you agree to the terms explained at the hyperlink below:

https://mycompanysite.com/TOS.html

Login

☐ Remember Me

Guest? Join a Meeting.

Theme / Logo
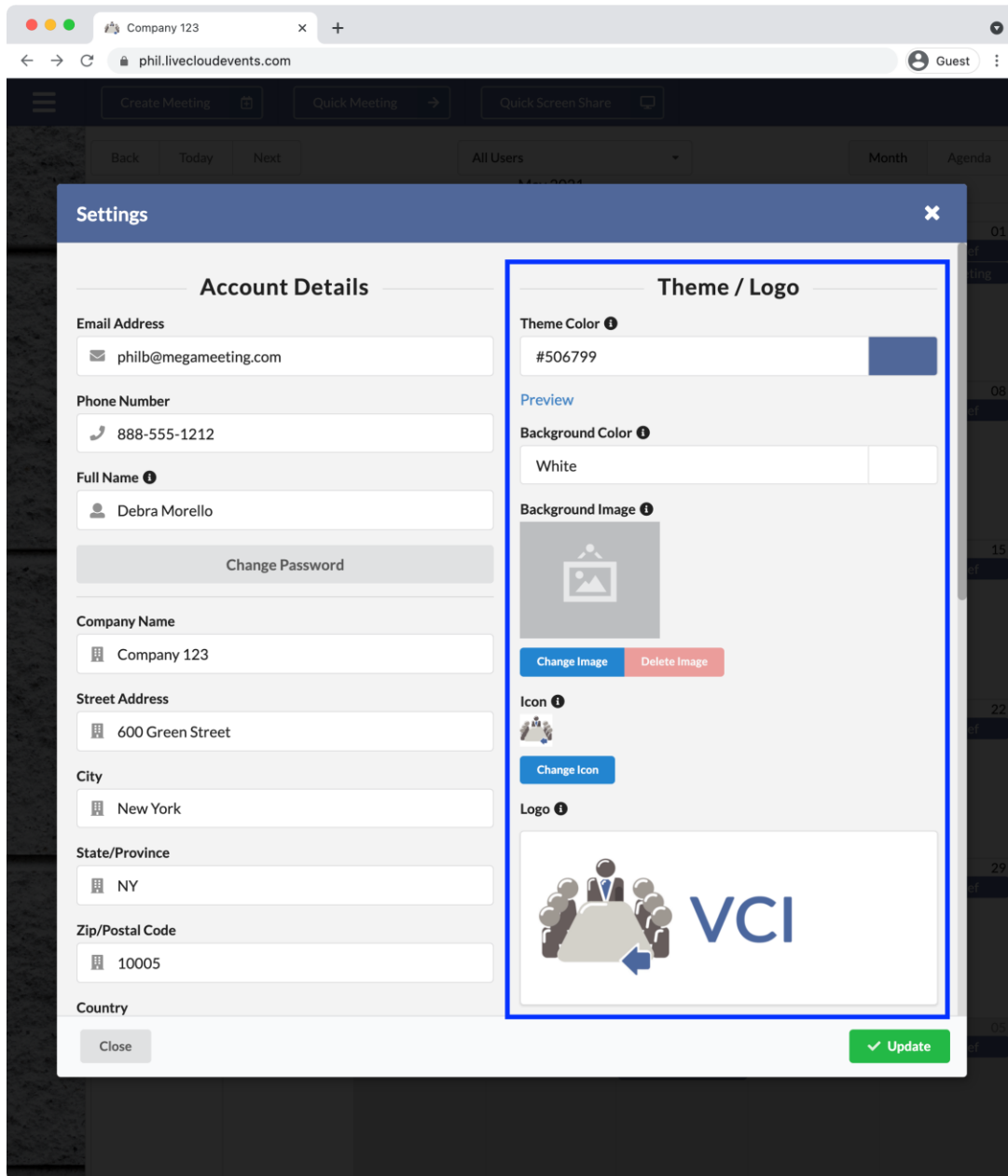
- **Theme Color**: Set the main theme color that is used across your account page, meetings, and in email invitations. Choose one of the available presets or enter your own Hex Code.
- **Background Color**: Choose a background color from the presets available. This color should contrast well with your logo.
- **Background Image**: A background image can be used in place of a background color.
  - Supported Files: PNG, JPG
- **Icon**: A background Your icon will appear as the favicon in your web browser and as a home screen icon when the app is installed.
  - Supported Files: ICO

- **Logo**: A picture or logo that shows up in the bottom right of your account and meeting pages.
  - Supported Files: PNG, JPEG, GIF
  - Recommended Size: 250 px.

Custom Options
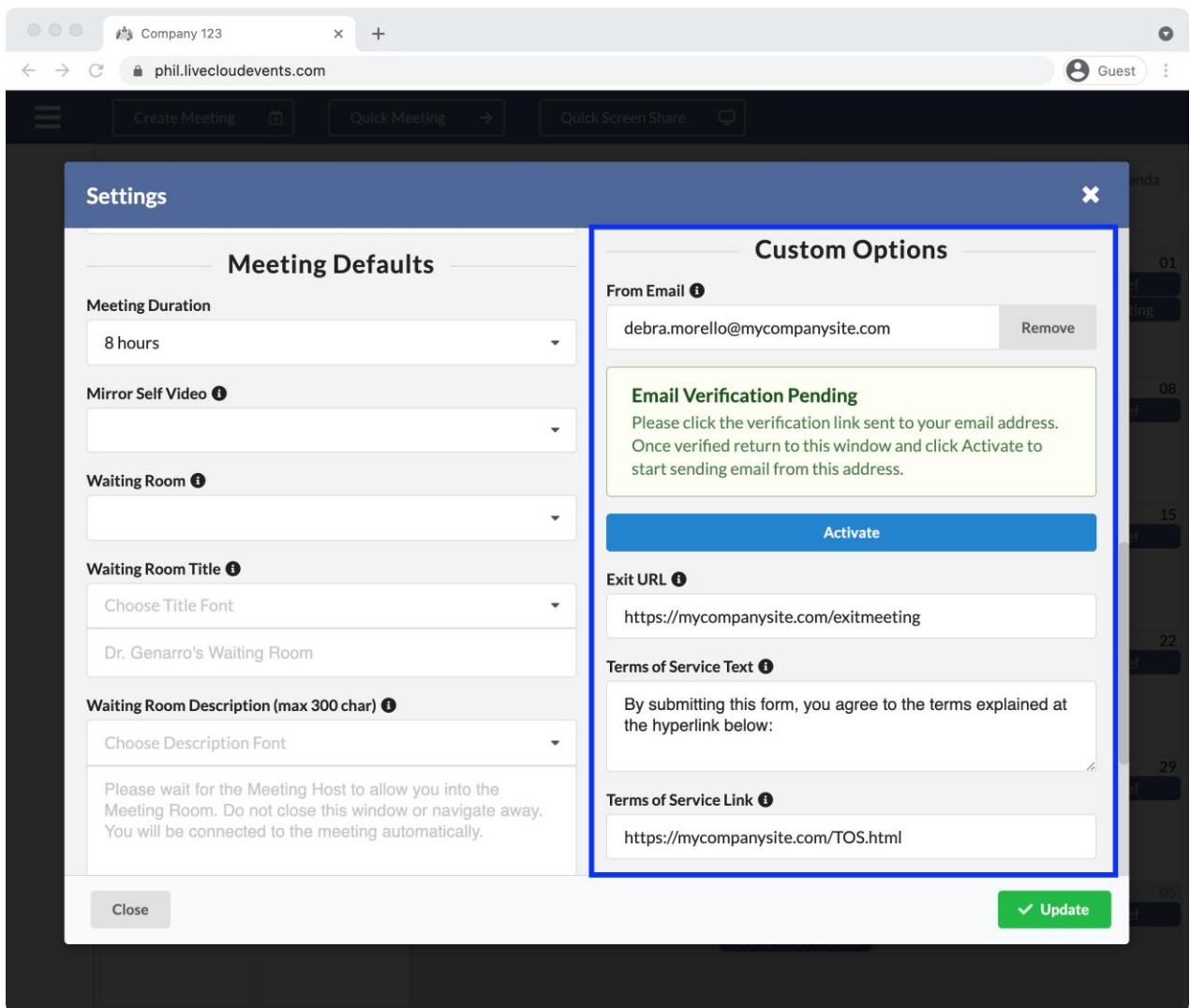
- **From Email**: Use any email address that you own as the "FROM" address for all emails sent by your account. This includes user activation emails, password resets, email invitations, etc.
  - Enter a valid email address and click Verify.
  - You will receive an email from Amazon Web Services containing a link to click to verify that you own the email address. Click the link included in this email.
    - Return to your Account Settings and click the Activate button.
- **Exit URL**: Define a custom exit page that guests will visit when exiting a meeting.

- **Terms of Service Text**: Under the terms of the Taqtik Telehealth White Label Agreement, you arerequired to display a sufficient Terms of Service to users of your platform if you plan on replacing the default Terms of Service and Privacy Policy.
- **Terms of Service Link**: Optionally define an external link to your Terms of Service, which isdisplayed on the Login/Join page below the Terms of Service Text and only if custom Terms of Service text is applied.

Custom Account Domain

You can use your own domain name as the address for accessing your Taqtik telehealth account.

This web address is where you and all of your users will access your account. By default, your account is assigned a generic website, e.g. "app-123456.megameeting.com" which will be replaced in this process by your website. The first step is to choose a host name, which will be the first part of your website in the address bar.

- We recommend choosing something relevant such as "meeting.domain.com" or "meetwithus.domain.com". In this example, "meeting" and "meetwithus" are the host names and will be used in the following step.
- Next, you will need to create a CNAME record in your DNS hosting provider. The CNAME needs to point to m4.megameeting.com which will point your host name at our servers. When creating your CNAME, enter "meeting" or whatever value you chose in the previous step to be the host. Example CNAME instructions for Godaddy.
- Other DNS providers will be similar: https:// www.godaddy.com/help/add-a-cname-record-19236 Once you have created the CNAME record, notify support@taqtik.io.
- Please include your name, email address, and new account domain name.

- Once we verify that the CNAME has been created, we will complete the change on the back end to convert your account domain to the new custom address