Instruction manual for our i24 Client Portal

Table of contents

Connection

Log on to the following link: https://clients.i24image.com/

This link is also accessible via our website: https://i24image.com/ via the "Customer Login" section.

Note: It is recommended to add this link to your "favorites" to speed up your future access.

Here is an overview of the login window you will see:

Enter your Username and Password and click on "Sign In" to access your account.

Overview of the platform

Once logged in, the platform will take you to the home page.

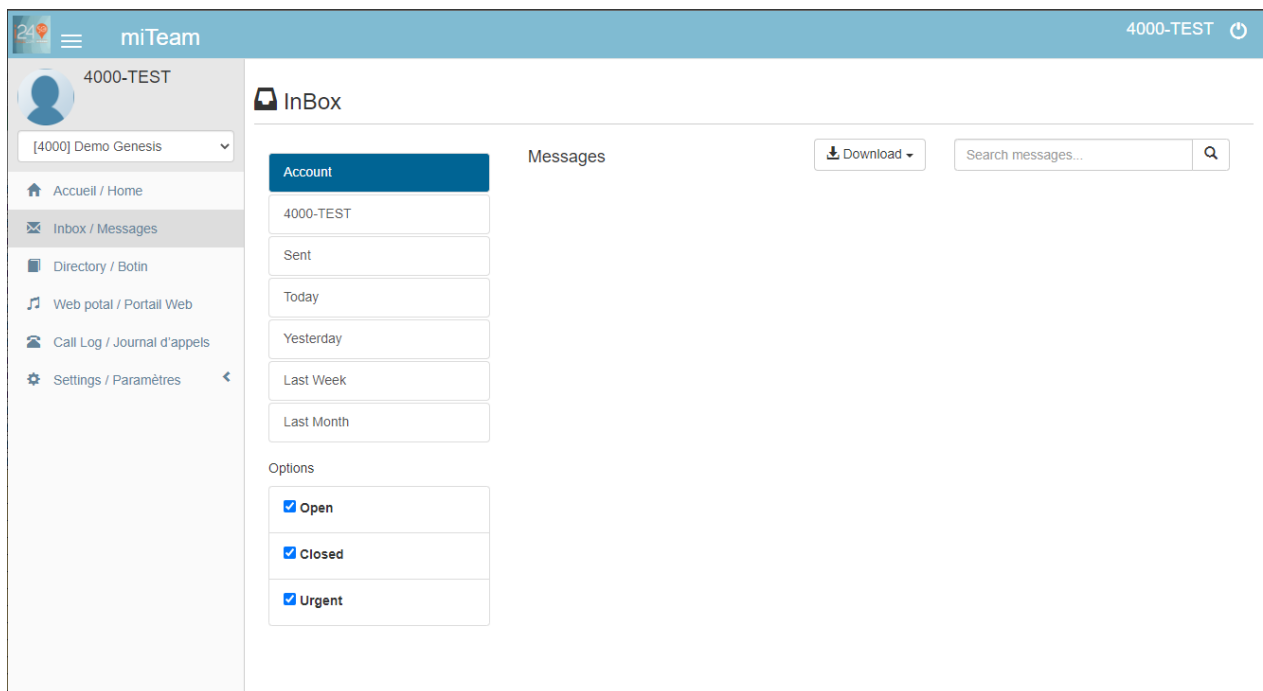Here is a brief description of what the home page includes:

1. A welcome and instruction guide of the platform.
2. The different sections of the platform and their various functions.
3. The client account you are currently under. If you have more than one account accessible via the same username, you can use the drop-down menu to switch between them.
4. If your window is smaller, or if you are using a phone, it is possible that the menu of sections indicated in point 2 will not be visible. This menu will be accessible via the 3 lines at the top left of your screen.
5. Your username, as well as the place to log out.

"Inbox / Message"

This section allows you to view the messages taken by our team on your account. There are some filters provided to facilitate your search with the moment the message was taken by our team.

You can also download all or a portion of your messages via the "Download" button.

Messages are available in this section for a maximum of 60 days.

"Directory"

This section allows you to view the contacts available to our team, as well as their contact information.

Since our scripts need the details available in the directory tab to be entered in a specific way and to avoid any problems with the functioning of your custom script and the distribution of your messages, modifying the information in your contact directory can be done by contacting our team via service@i24image.com .

"Call Log"

This section allows you to listen to the calls answered on your account during the last 60 days.

1. Enter the dates for which you want to see the calls.
2. Click on "Search for calls".
3. The results will then be displayed.
   Note that the calls will be displayed in two sections: Calls from the last 7 days will be in the 'Call Log Search Results' portion at the top. Those from 8-60 days will be in an 'Archive' section displayed just below.

The button called "Details" refers to a transaction without a conversation. Depending on the programming of your account, this could be an email management case or the dispatch of your messages.

The button called "Voice" will be when there is a recording associated with a call.

You can either download the audio directly or click on the "Voice" button to listen to the recording and access more advanced options.

"On Call"

1. Under "Schedules", you will be able to see all your various on-call schedules built to meet the needs of your account. It will be important to select the schedule you wish to work on. If your account is built using a single shift schedule, it will be selected by default.

2. The "assign" button is used to identify who the person on-call is in your team for the selected shift.

    The "Override" button is to be used in case you want to replace the basic assigned person with another one, while keeping an accurate history.

    The "Unassign" button is used to remove an assignment from your team member. If done on an override it will return the original person to being the one on call. If done on the initial shift, it will make it empty again.

3. The "View" button allows you to select your favorite view of the on-call schedule. By day, week, month, etc.

    The "Comment" button allows you to add notes to a shift. This feature is recommended to keep track of the changes made to your account and schedules. Please note that a comment cannot be used to indicate a new on-call person, as our system will not recognize the

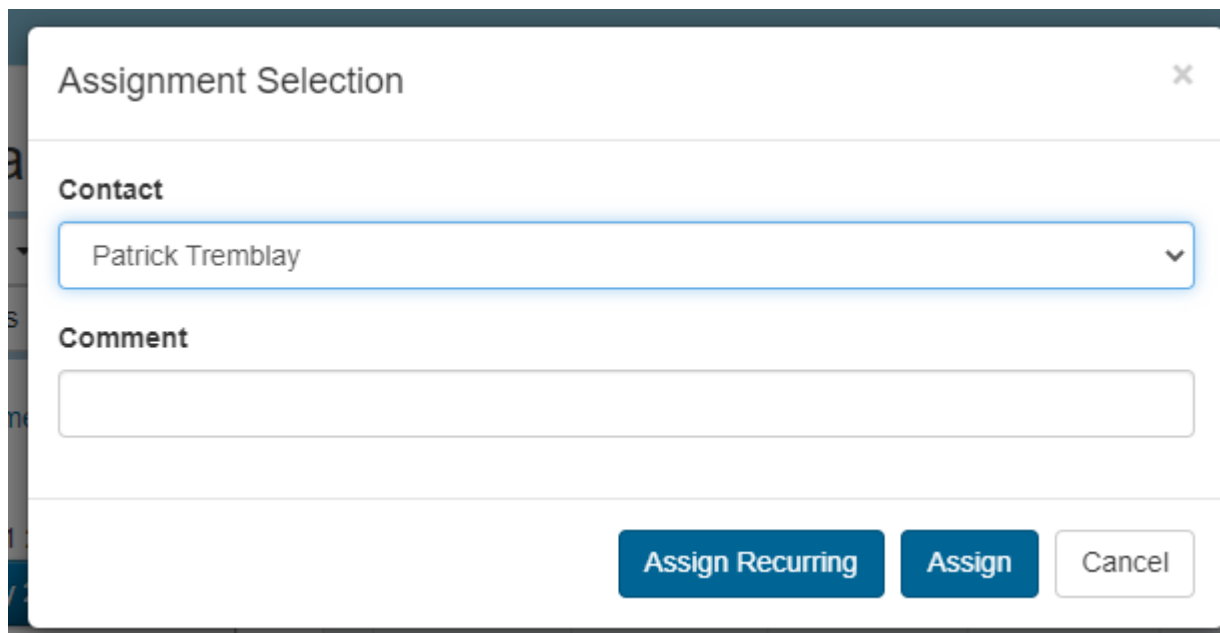information and it will not act accordingly. Your on-call person must be the person assigned to the shift.

 The "Save as PDF" button allows you to save your schedule as a PDF. This is useful for sharing with your team or keeping it on file.

4. The calendar allows you to quickly see if any of your shifts remain unfilled.
 If the day is in green, it means that all shifts have a person assigned.
 If the day is in yellow, it means that some shifts have a person assigned, and others are empty. You will have to assign a person for the proper functioning of your calls.
 If the day is in red, it means that all the shifts are empty, and a person must be assigned to ensure the smooth running of your calls.

5. Your various shifts: Click to choose the shift in which you wish to assign your guard. On the image above, we have 2 different periods, one from 04/24 7h30am to 05/01 7h30am and the other from 05/01 7h30am to 05/06 7h30am. Depending on your needs, your account could have multiple people on call for the same period and the "Rank / Order" would indicate who is the first contact, the second, etc. The example above indicates that there is only one on call person.

6.

Assigning a Custodian

To assign the person in charge of a shift, you will need to:

1. Select the relevant schedule in "Schedules" (point 1 above)
2. Select the desired shift on the schedule (point 5 above) and click on it.
3. Click on "Assign".
4. Select the desired contact from the list of contacts that will appear.
5. If necessary, add a comment in the "comment" field.
6. Click on " Assign ".

Note: If you need assistance in changing dates, times, adding or deleting shifts or a contact person, please contact our team at service@i24image.com

Make a temporary change ("Override")

Knowing that sometimes your routine may require you to make a temporary change to your established on-call schedule, here's how to make an override. This can be used to replace a member of your team for all or a portion of the original shift.

Please note that an override cannot begin before or end after the dates and times of the original shift. It is possible that more than one override may be required to accomplish the desired replacement, depending on the configuration of your shift schedule.

1. Click on the shift for which a temporary change is required.
2. Click on "Override

3. Enter the beginning of the replacement (Reminder: this date and time must be between the beginning and the end of the shift on which a temporary change is applied, in this example, the beginning cannot be before 05/01 7h30am)

4. Enter the end of the replacement (Reminder: this date and time must be between the beginning and the end of the shift on which a temporary change is applied, in this example, the beginning cannot be before 05/06 7h30am)
5. Choose the person who will be on call for this period.
6. Click on "Save".

Shift Override ✕

Shift: Rotation

Role: OC

Duration: 5/01 7:30 am - 5/08 7:30 am

Contact: Anthony Giosi

Start Time   **End Time**

05/01/2023 7:30 AM   **3** 📅   05/03/2023 7:30 AM   **4** 📅

Covering Contact

Luc Lambert   **5**   ⌄

Comment

Rank

0

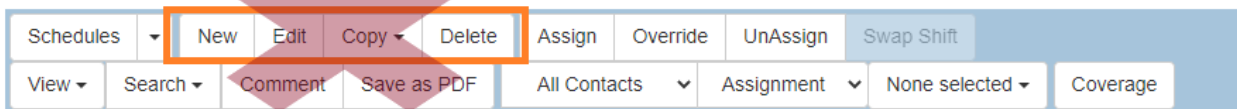   **6**

Save   Cancel

What you should not do

Please note that you cannot add a new schedule or modify an existing or an active one as your script and your on-call people being linked by programming, it would damage the whole. Any programming required to correct this type of situation will incur additional costs.

"Settings”

This section allows you to reset your password, if needed.
 Please note that i24 does not have access to your password if you have changed it. However, we can assist you by resetting your password for you.