

Welcome

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# Robal Company User-Manual



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# Security

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- Robal uses Two-Factor Authentication to provide users an extra level of security for their account.
- Robal does not collect cookies, Robal uses auto refresh tokens to remember your work.
- The Robal Tech applications are built upon Amazon Web Services (AWS), the world's most comprehensive and broadly adopted cloud platform. AWS is architected to be the most flexible and secure cloud computing environment available today.
- **Security of the cloud** – AWS is responsible for protecting the infrastructure that runs AWS services in the AWS Cloud. AWS also provides Robal with services that you can use securely. Third-party auditors regularly test and verify the effectiveness of our security as part of the [AWS Compliance Programs](#).



# Login

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- Username
- Password
- Two-Factor
- Add web link to portal

## How To Login

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- New companies should receive a pop-up message with a temporary password. Sign in with the username and temporary password. Then create a new password when prompted and login.
- To login, first enter your username and password, then when prompted for a two-factor authentication code, check the mobile number you used when creating your account for a code.
- Enter the six-digit code and click Sign In.



# Login

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**Welcome back!**

Sign in to your account to continue

**Sign in**

[Forgot password?](#)

[New to Robal? Sign Up](#)



# How To Access The Dashboard

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- After logging in, the dashboard will automatically load. If not, see instructions below.
- On the left-hand side select “Dashboard” to view the onboarding status and completion level.
- The dashboard contains an Onboarding Tracker that shows completed, pending, and not started status of forms. The dashboard shows the top 10 badges that are completed by Roballers.



# Dashboard

Robal-Tech Alpha v1.0

Search topics...

3 7

Dashboard

Welcome back, Caroline, Broderick! We've missed you. 🍌

DASHBOARD

- Dashboard

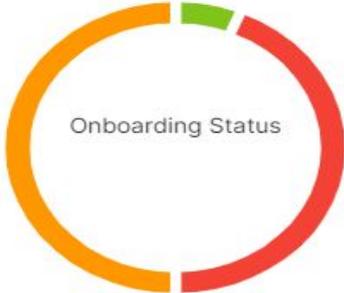
ADMIN

- Catalogs
- Profiles
- Users

HELP

Privacy Terms of Service © 2022 - Robal Tech

## OnBoarding Tracker



### Onboarding Status

Completed

Pending

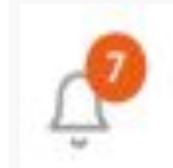
Not Started



# Messages, Notifications, And Languages

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- To access messages, select the message icon in the upper right-hand corner.
- To access the notifications, select the notification icon in the upper right-hand corner.
- To change languages, select the flag icon in the upper right-hand corner and select the desired language.



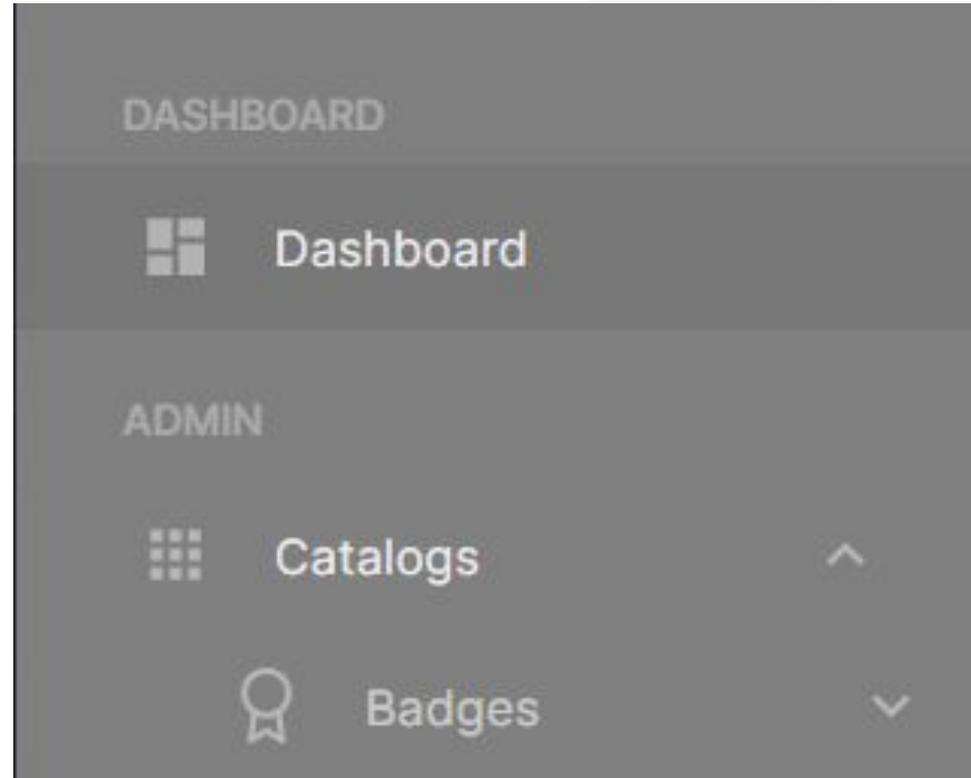
# Catalog

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- Under the Catalog drop down, is a Badges drop down that contains a Details page and an Add Badge page.
- The Details page contains information on the created badges.
- On the Add Badge page, choose an icon for the badge and fill in the required fields.

# Catalog

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## How To Add A Badge

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- To add a **badge**, first select the Catalogs dropdown on the left-hand side and then select Add **Badge**.
- Fill out the required fields and select Save Changes.
- To edit a badge, select the badge in the details pages, changed the desired fields and select Save Changes.

# How To Add A Badge

## New Badge

[Dashboard](#) / [Badges](#) / [Create Badge](#)

Badge Name

Search an Icon for your Badge

AccessAlarm	AccessAlarms	Accessibility	AccessibilityNew
Accessible	AccessibleForward	AccessTime	AccountBalance
AccountBalanceWallet	AccountBox	AccountCircle	AcUnit
Adb	Add	AddAlarm	AddAlert
AddAPhoto	AddBox	AddCircle	AddCircleOutline

Badge Icon

Popup Msg

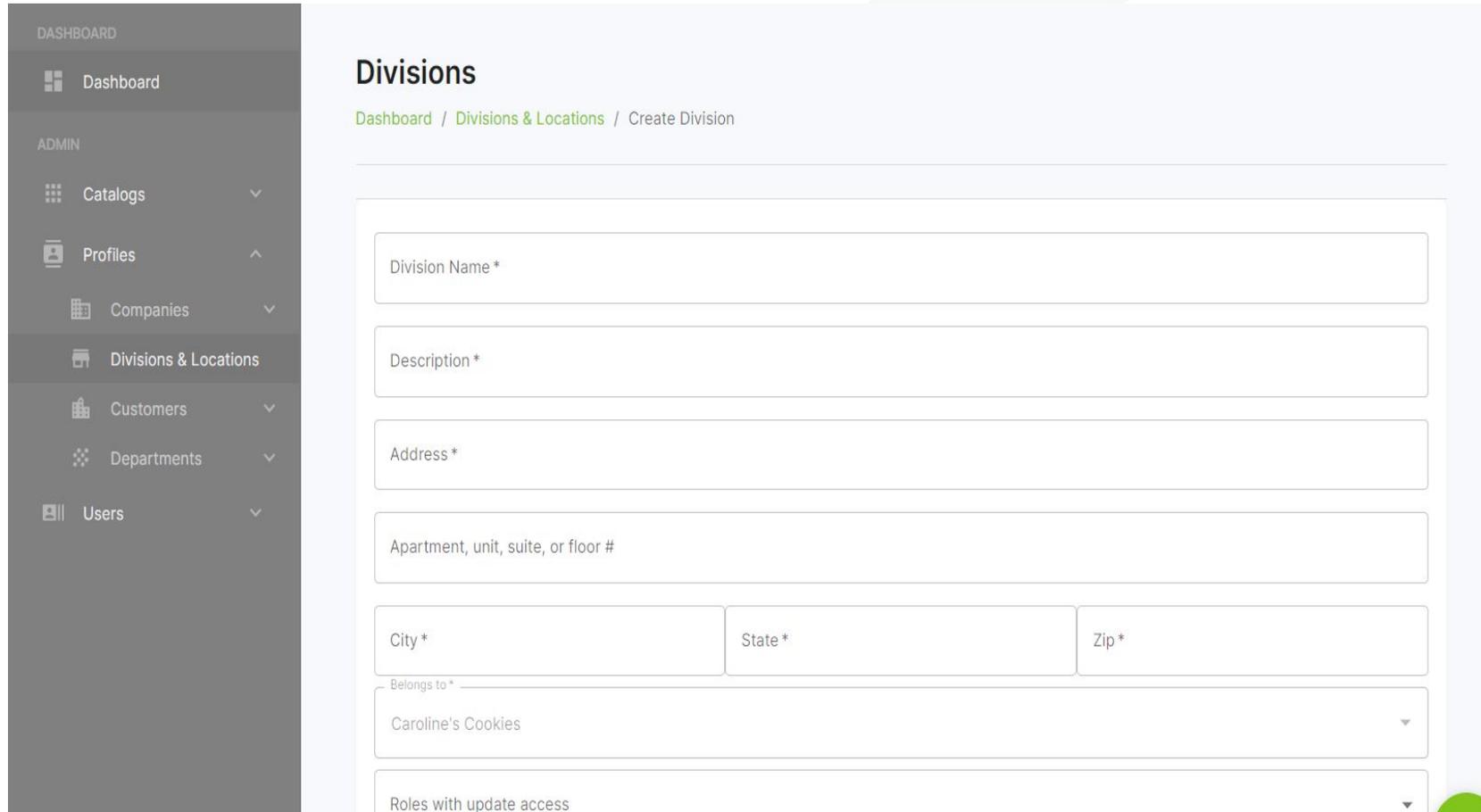


# How To Add A Division And Location

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- To add a **division**, first select the Profiles drop down on the left-hand side, then select Divisions & Locations.
- Select the New tab in the right-hand corner.
- Fill out the required fields and select Save Changes.
- To add a **location**, select the division first, then select New in the right-hand corner.
- Fill out the required fields and select Save Changes.

# How To Add A Division



**Divisions**

[Dashboard](#) / [Divisions & Locations](#) / Create Division

Division Name \*

Description \*

Address \*

Apartment, unit, suite, or floor #

City \* State \* Zip \*

Belongs to \*

Caroline's Cookies

Roles with update access



# How To Add A Location

**Locations**

[Dashboard](#) / [Divisions & Locations](#) / Create Location

Location Name \*

Description \*

Address \*

Apartment, unit, suite, or floor #

City \*      State \*      Zip \*

Belongs to \*



## How To Add A Customer

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- To add a **customer**, first select the Profiles drop down on the left-hand side, then select Customers, and select Add **Customer**.
- Fill out the required fields and select Save Changes.
- Add a profile picture by selecting the green **Profile Avatar** link and choosing your desired photo.



# How To Add A Customer

**DASHBOARD**

- Dashboard

**ADMIN**

- Catalogs
- Profiles
- Companies
- Divisions & Locations
- Customers
- Details
- + Add Customer**
- Departments
- Users

## New Customer

Dashboard / Customers / New Customer

Customer Name \*

Description \*

 Profile Avatar 

For best results, use an image at least 128px by 128px in .jpg format

Email \*

Phone Number | format: +12223334444 \*

EIN \*

Rate Factor \*

50

Website Url



## How To Add A Department

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- To add a **department**, first select the Profiles drop down on the left-hand side, then select Departments, and select Add **Department**.
- Fill out the required fields and select Save Changes.

# How To Add A Department

DASHBOARD

- Dashboard

ADMIN

- Catalogs
- Profiles
- Companies
- Divisions & Locations
- Customers
- Departments
- Details
- + Add Department**
- Users

## New Department

[Dashboard](#) / [Department](#) / New Department

Department name \*

Email \* Phone Number | format: +12223334444 \*

Rate Factor \*  
50

Customer

Locations

Point of Contact



## How To Add Staff

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- To add **staff**, first select the Users drop down on the left-hand side, then select Staff, and select Add **Staff**.
- Fill out the required fields and select Submit.

# How To Add Staff

**Dashboard**

- Dashboard

**ADMIN**

- Catalogs
- Profiles
- Users
- Roles
- Staff
- Details
- Add Staff
- Roballers

## Staff Profile

Dashboard / Staff

### User Profile

First name \*

Last name \*

Email address \*

Phone Number | format: +12223334444 \*

User Type \*

## How To Add A Role

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- To add a role, select the users drop down on the left-hand side of the screen, then select roles from the drop down. and add role.
- Fill in the required fields and select Save Changes.

# How To Add A Role

**Create Role** [Close]

Role Name

Tenancy\*  
Caroline's Cookies

Created At

Updated At

Archived

Use it as Global Role

Is Default HR Admin Role

**Save changes**