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## Preface

This preface explains the audience, purpose, and organization of the Zata User Guide. It also defines the conventions that are used to present instructions and information.

## Audience

The Zata App User Guide is designed for individuals, Businesses and Organizations who wants to achieve business goals and track metrics.

## Purpose

The Zata Apps User Guide provides detailed information on how to use the mobile application.

## Conventions

This document uses the following conventions.

Item	Conventions
Commands and keywords	<b>boldface font</b>
Emphasis or variables for which you supply values	<i>italic font</i>
Menu items and button names	<b>boldface font</b>
Selecting a menu item	<b>User &gt; Preferences</b>

**Note:** Means reader take note. Notes contain helpful suggestions or references to material not contained in the publication.

**Tip:** Means the following information will help you solve a problem.

## Chapter 1: Overview

The Zata Apps provide your end users with iOS (Apple) or Android tablet/smartphone mobile functionality in an application that can be downloaded from the Apple or Google Play stores.

The following are features in the Q2mobility Apps:

- Progress report/kanban board
- Create custom metrics you want to track and even a formula to help you measure.
- Users can complete on common goals and work as a team to accomplish them.
- From small business to enterprise track productivity for employee performance.

- Users get prompt notification on goal updates, messages & user request.

## Chapter 2: End User Tasks

This chapter provides information about the tasks necessary for your end users to use the Zata App.

### Download the Application

To download the application directly from the Apple (App Store) or Android (Play Store):

1. Click on <https://dashboard.zata.co/login>
2. Download the app from App store for IOS or Playstore for Android users.
3. Launch the App or Play Store application on your mobile device.

### Sign In

Once you have downloaded the application and have your user ID and password, you are now ready to sign in.

1. On your mobile device, launch the application.
2. Enter a valid User ID and password and tap SIGN IN. If your information is correct, the Interstitial page appears as your information loads.

Note: IF you wish to have your device remember the User ID for your next sign in, select the Remember Me check box before signing in.

### First Time Users

If you are a first-time user, additional steps must be completed before gaining access to your accounts and application functionality.

To sign in for the first time:

1. On your mobile device, launch the application.
2. Launch the application.
3. Sign up with either your Apple ID. Google or Facebook OR  
"Click on Sign up" Then enter your name. email, and password

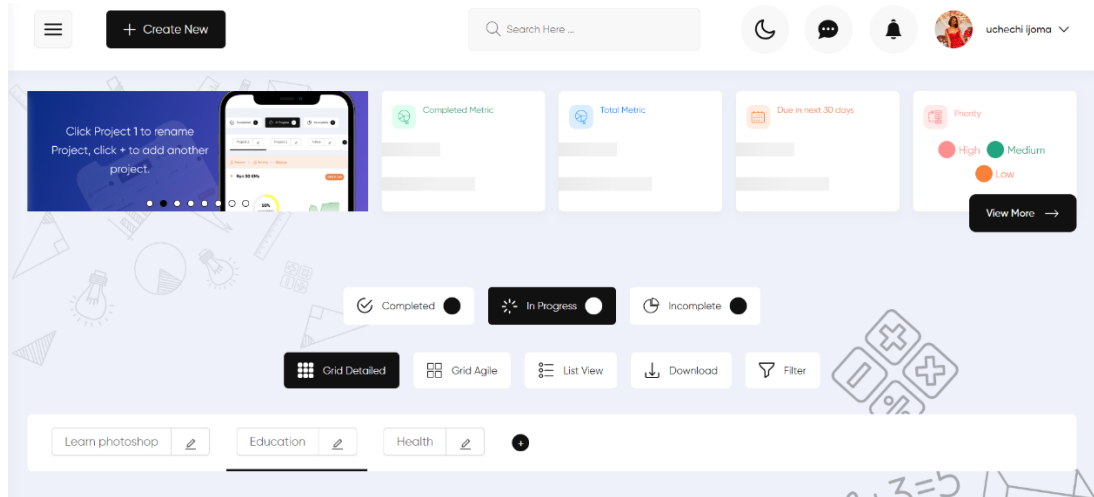
Once you sign into the application, the Interstitial page appears prompting you to authorize updates.

The image shows a login form with a newsletter subscription pop-up at the top. The pop-up has a logo and text: "Receive the latest news, updates and offers as they happen." with "No Thanks" and "Allow" buttons. Below the pop-up, the login form includes fields for "Email" (with placeholder "yourname@example.com") and "Password" (with placeholder "password" and an eye icon for toggling visibility). At the bottom of the form are checkboxes for "Remember me" and a link for "Forgot Password?".

## Dashboard

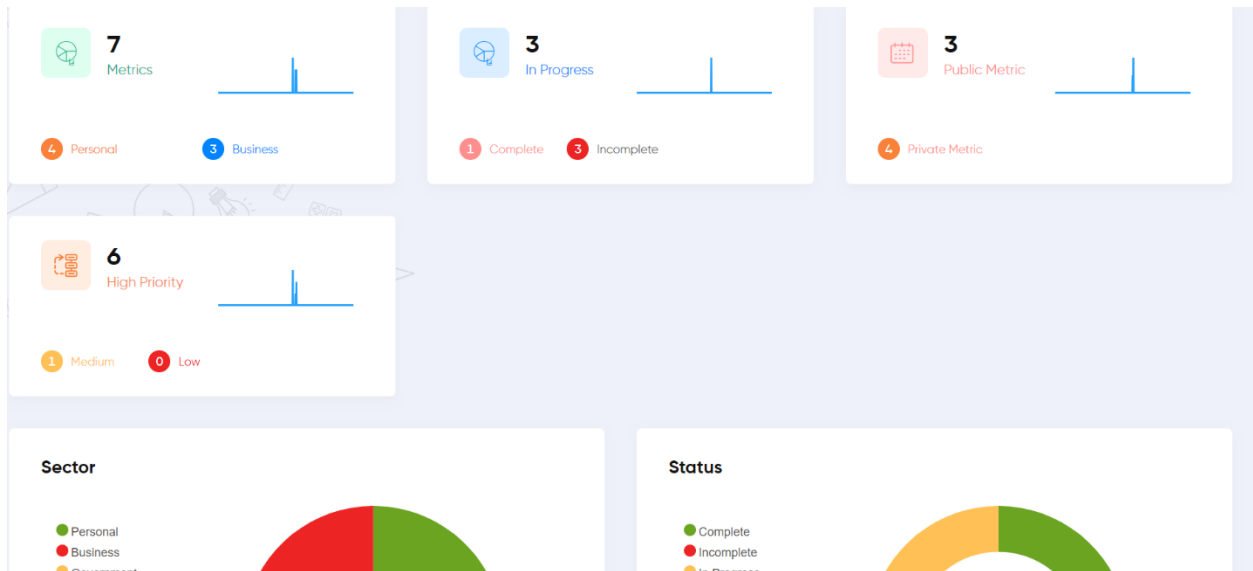
The Dashboard appears immediately following the Interstitial page and provides quick access to the following features:

- Summary Metrics menu which displays amounts of total metrics, completed metrics, when its due, your priority, and your goal progress.
- Chats and Notifications
- Filter widget
- List view
- Download button.
- Search button.



## Summary Metrics

The Summary Metrics graph provides an additional access point to view details for each of your set goals. Just tap a section of the graph and the applicable metric summary will display with the option to view.



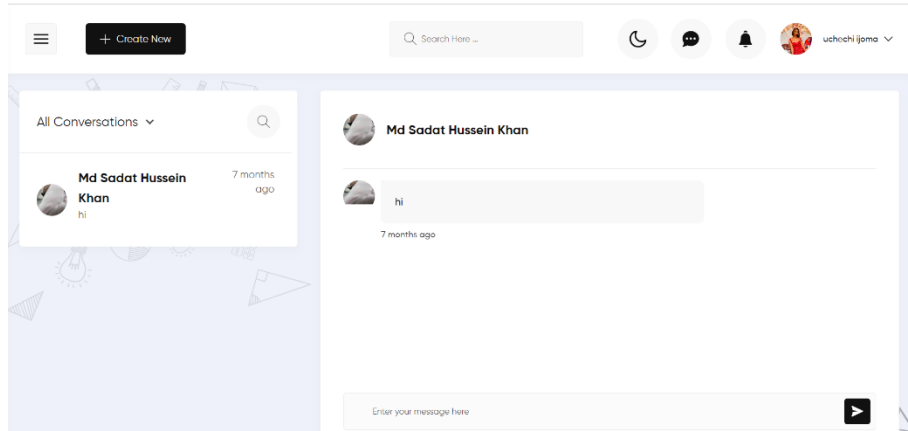
## Chat and Notifications

Messages and Alerts to and from your contact are consistent between Mobile Web, and tablet/smartphone applications. This means if you select to send a message or receive a notification while working, you can always use your tablet to reply.

Our secure messaging is integrated so messages you receive in one channel are always visible in the other channel.

## View Chat

To view secure messages, tap the Messages/Chat tab at the top of your application.



To view message details, tap the desired Chat in the list.

## Reply to a Chat

You can reply to any message available in your secure chat queue.

To reply to a message:

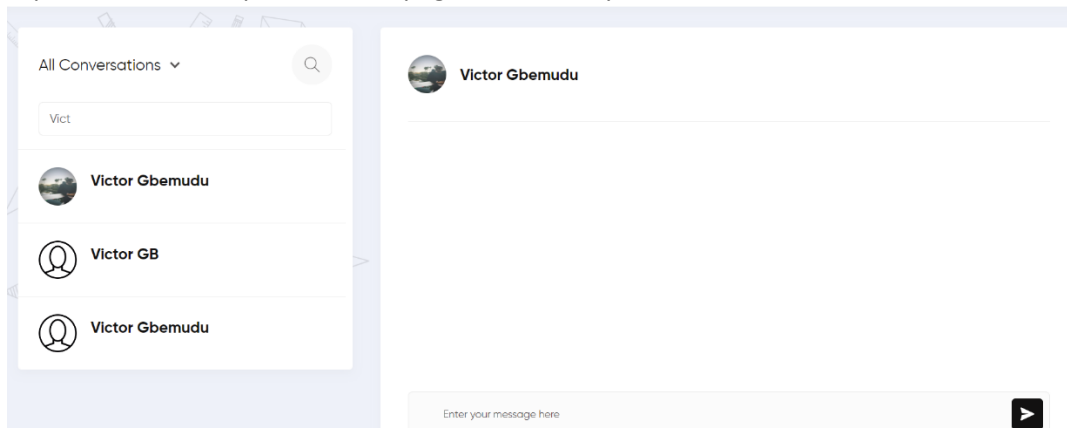
1. Tap the chats tab. The Messages page appears.
2. Select a chat in the secure chat queue. The chat details appear.
3. Tap Reply. A message window appears displaying the addressee and message subject.

## Create a New Chat

You can create a new secure chat for distribution to many of your contact or departments.

To create a new message:

1. Tap Search at the top of the Chat page and search your contact to start a conversation



## Filter Widget

You can use the Filter widget to limit the visibility of features. Only the features that you require will be displayed.

×

Close

Filter Widget

Sort goal/metrics by

Please Select

Goal/Metrics name

Please enter goal/metrics name

Goal/Metrics type

Please Select

Projects

Please Select


## Profile Setup

### For Individuals/Business

Once you login to the dashboard, From the top right, Click the drop-down arrow beside your name:

- Click on profile
- Choose your avatar
- Fill in your details
- Click Save

[Edit Profile](#)



**uchechi ijoma**

First Name

Last Name

Designation/Title

Gender

Female
▼

Birth Date

Mobile

**Tip:** The optimal dimensions for an image are 300px by 300px

## For Organization

From the top right, Click the drop-down arrow beside your name:

- Click on Organization
- Click “Add Organization”
- Fill in your organization details
- Click “save”
- Click “Details”
- Scroll down and add Department.

< Back

Organizations

Setup Custom Metrics

Payments

Member List

Help

+ Add Organization

Name	Address Line 1	Address Line 2	City	State	Option
Shopmoore	Lagos		Lagos	Lagos	<div style="display: flex; gap: 10px;"> <div style="border: 2px solid #000; border-radius: 10px; padding: 2px 10px; background-color: #000; color: white;">Details</div> <div>Department</div> </div>

<
1
>



**Tip:** You can add more than one organization and Department

## Password

Log into your profile

- Click on Change password
- Follow the prompt

## Email Change

Log into your profile

- Click “change Email”
- Follow the prompt

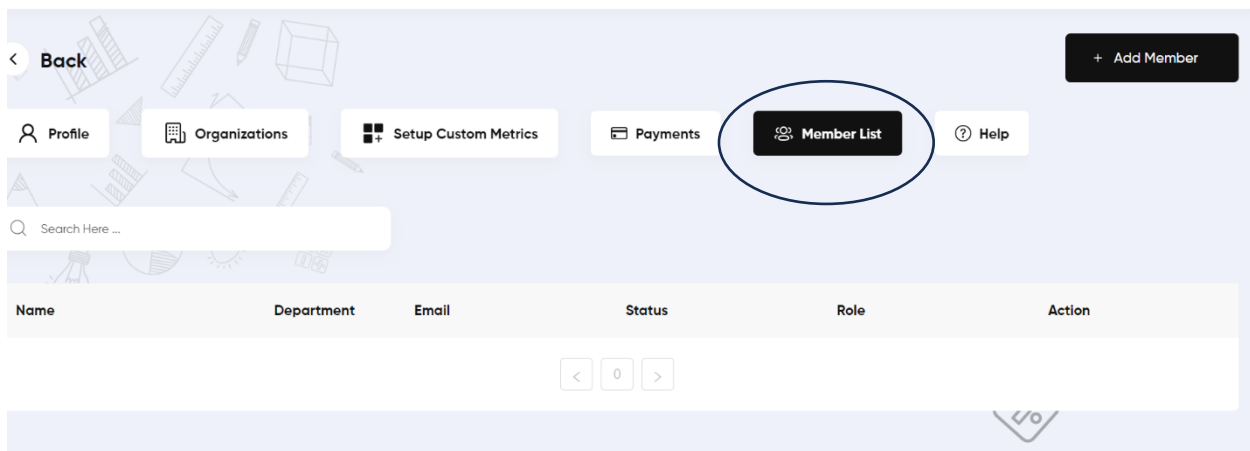
## Create your Member List

Member lists are helpful for job.

To add a member to your Space:

- Log into your profile
- Click on members list.
- Click on “Add new member.
- Click on ‘ok”

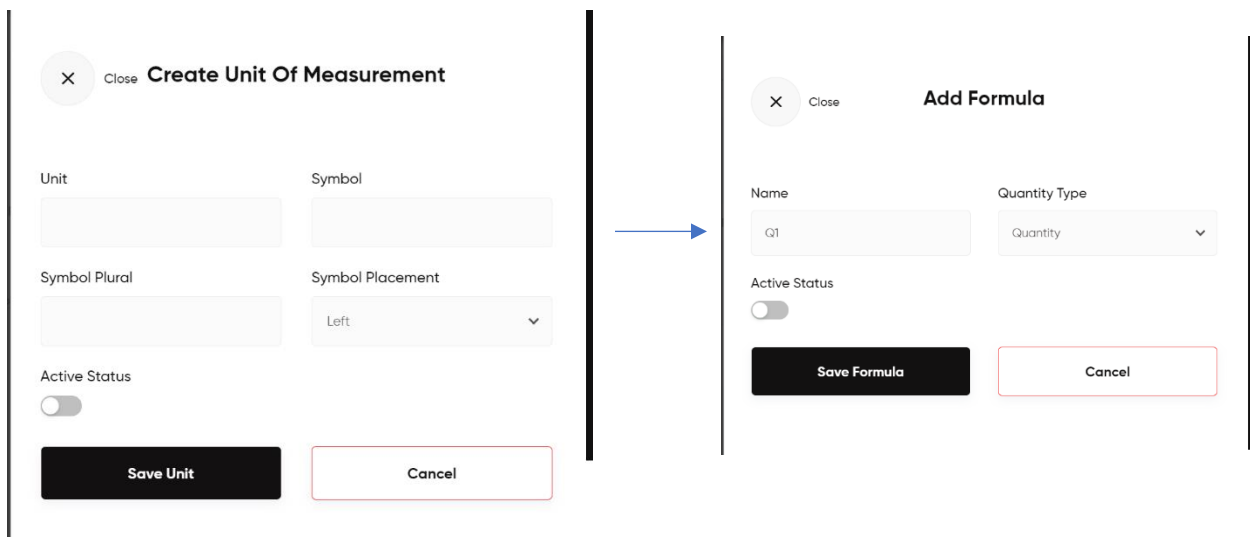
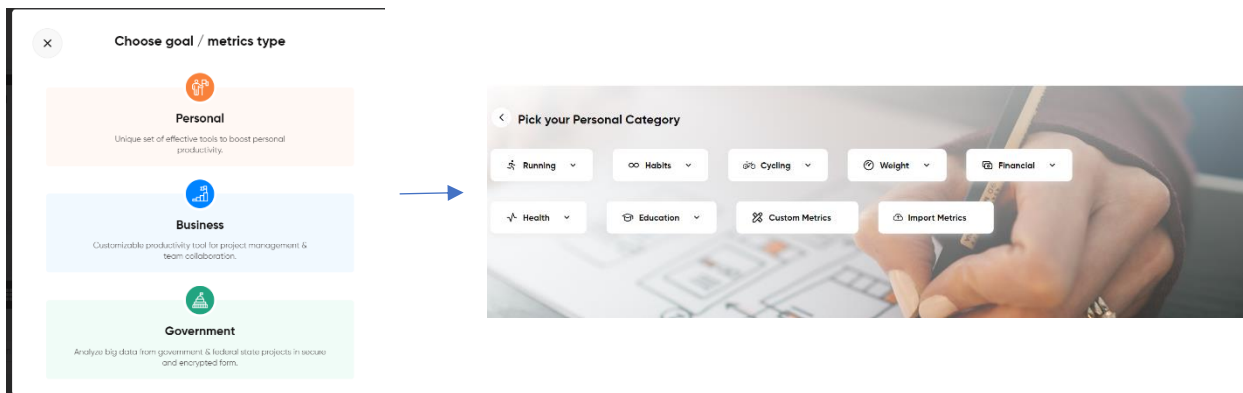
You are all set!



## Create Metric/Goal

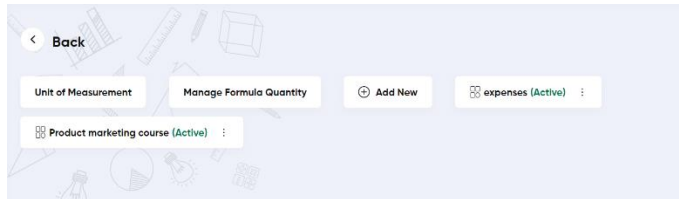
You can also customize your metric or "Create New" in Zata's homepage or dashboard to start a new goal:

- Select "Personal"
- "Pick category".
- Click "Custom Metrics"
- Click "Unit of Measurement"
- Click "Add New"
- Click "Manage Formula Quantity"
- Click "Add New Formula"
- Create Formula and choose to make it active/inactive
- Click "ok"



To fully track your goals:

- Click on the category you created e.g product marketing
- Click "Create Metrics"
- Click on "Add New"
- Follow the next steps
- Click "ok"

A screenshot of the 'Create custom metric' dialog box. It has a title bar with a close button (X). The form contains three main sections: 'Name' with a text input field; 'Unit of Measurement:' with a dropdown menu showing 'Please select'; and 'Icon' with a large rectangular area containing a blue folder icon and the text 'Click or drag file to this area to upload icon' and 'Accepted file type: png,svg only'. At the bottom right, there are 'Cancel' and 'Save' buttons.

## Organization

Click "Create New" in Zata's homepage or dashboard to start a new goal:

- Select "Government"
- "Pick government category".
- Click on "create custom metrics"
- Click "Setup Custom Metrics"
- Click "Unit of Measurement"
- Click "Add New"
- Click "Manage Formula Quantity"
- Click "Add New Formula"
- Create Formula and choose to make it active/inactive
- Click "ok"

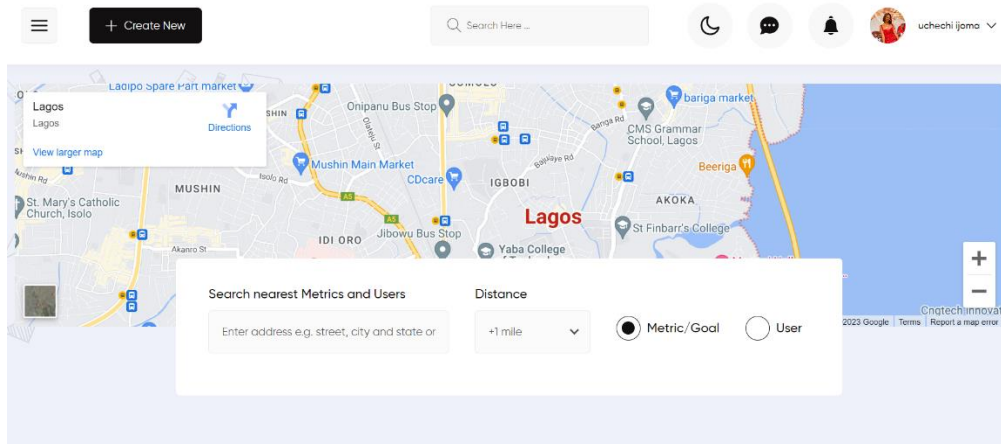
To fully track your goals:

- Click on the goal you created e.g Analytics
- Follow the rest of the following steps
- Click on 'Create Metrics'

## Metric Search

To locate users near you, Click on the sidebar

- Click "Metrics Search"
- "Enter address e.g. street, city and state or zip" field.



**Tip:** You can search based on Metrics/Goal or User

## Explore through the Sidebar

Within the Sidebar, you have access to different functionality of the app. Take advantage of the following Sidebar functionalities:

**Search:** Find tasks and lists you have access to.

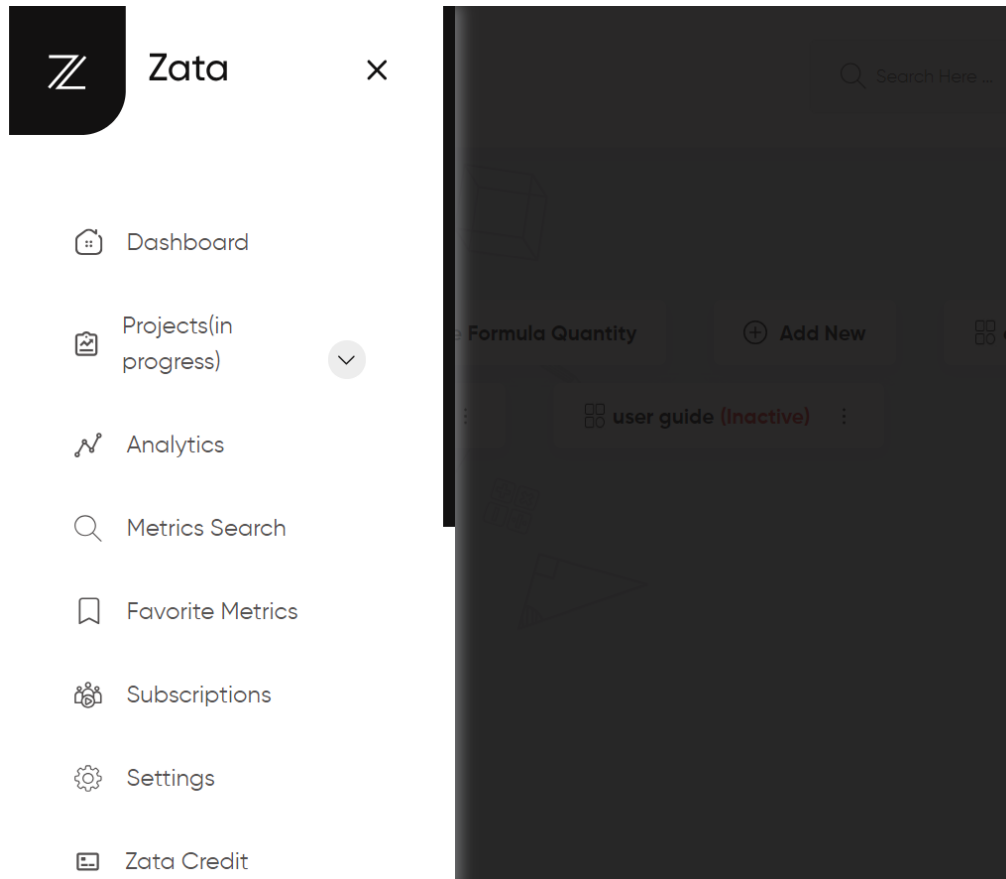
**Home:** Manage your work using the available home features.

**Notifications:** Access notifications matching your notification settings based on the activity.

**Goals:** View or edit individual Goals.

**Dashboards:** Review Dashboards.

**Analytics:** Easy access to summary of all your goals/metrics.



## Billing

You can find all your billing and plan details within your profile settings on the payment page.

### Prerequisites:

- A paid subscription plans.
- To handle billing matters or discuss billing information with Customer Support, you must either be an owner or an administrator.

Accessing your billing page can be done by following these steps:

Click on your dashboard sidebar.

Choose "Subscriptions"

Select "Annually/Monthly"

Select "Personal, Business or Government" to proceed to payment plan.

## Payment page details

The payment page comprises the following sections:

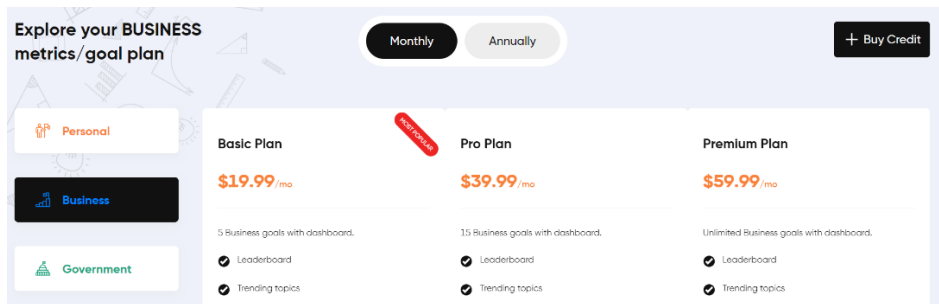
### Your plan

Information about your existing plan along with [links to upgrade](#) or [downgrade](#) your plan

### Pricing Details

The Pricing section provides the following details regarding your plan.

Ensure you're well-informed by understanding our pricing model. Additionally, familiarize yourself with when and how charges apply for adding members, guests, or administrators.



### Disable Auto-Renewal

For inquiries about canceling the automatic renewal of your paid plan subscription, kindly reach out to us for further assistance.

### Invoice History

Within the Invoice History section, you have the option to view or download invoices.

### Payment Method

Administrators can manage payment methods through the subscription page found in the side bar menu. You can modify your payment method, add or remove cards, and designate a default payment method.


We accept the following debit and credit cards:

- Paypal
- Visa

If you encounter any payment-related issues, we will provide guidance, and you can follow troubleshooting steps before contacting our support.

## ZATA Credits

If you have credits, you'll find them in the dashboard side menu section, located to the right. Scroll down the menu and click on "Add Zata Credits" and add, you can also add "custom zata credit" Your credits are automatically added.



**\$465.03**

Zata Credit

+ Add Zata Credit

\$ Transaction

Choose Amount

☐ \$25


☐ \$50

☐ \$100

Custom Amount


amount

Next



**Paypal**  
Safe payment online. Credit card needed. PayPal account is not necessary

☐



**Debit or Credit Card**  
Safe money transfer using your bank account. Safe payment online. Credit card needed. Visa, Maestro, Discover, American Express

☐

<b>Purchase Amount</b>	\$50
From Zata credit	
<b>Due today</b>	\$50