

page walkthrough

- ① Click the Notes tab to quickly move to the conversation notes section. The count of notes is shown in the tab.
- ② You can view all notes and replies on the conversation except those that someone has marked private that are not intentionally shared with you or your company. Notes that you have marked private are indicated with a lock icon on the left of the note.
- ③ Each note indicates the user that wrote the note and their company, the date the note was created, and the date the note was last modified.
- ④ You can delete or edit only notes and replies that you created. Anyone with access to the notes can reply one or more times per note.
- ⑤ Use the "Sort by" option to change the sort order of the notes. Replies will always be listed along with the note it is associated with.
- ⑥ Click Add Note to create a new note. Refer to the help topic Conversation – Add, Edit, & Share Notes for more information.

Respond to Note

This is how you write a note. The text goes in here, then you specify who can read the note.

1

2

☐ Public - Only people/companies on this conversation can view.

☒ Private - Select people/companies who can view.

Who can see this?

4

3

5

Contacts

Add Contact

chris burton
Company: ALDEN SYSTEMS, INC.
Username: cburton
Email: cburton@aldensys.com

Jacquie Davis
Company: ALDEN SYSTEMS, INC.
Username: jdavis
Email: jacquelyn.davis@aldensys.com

Companies

Add Company

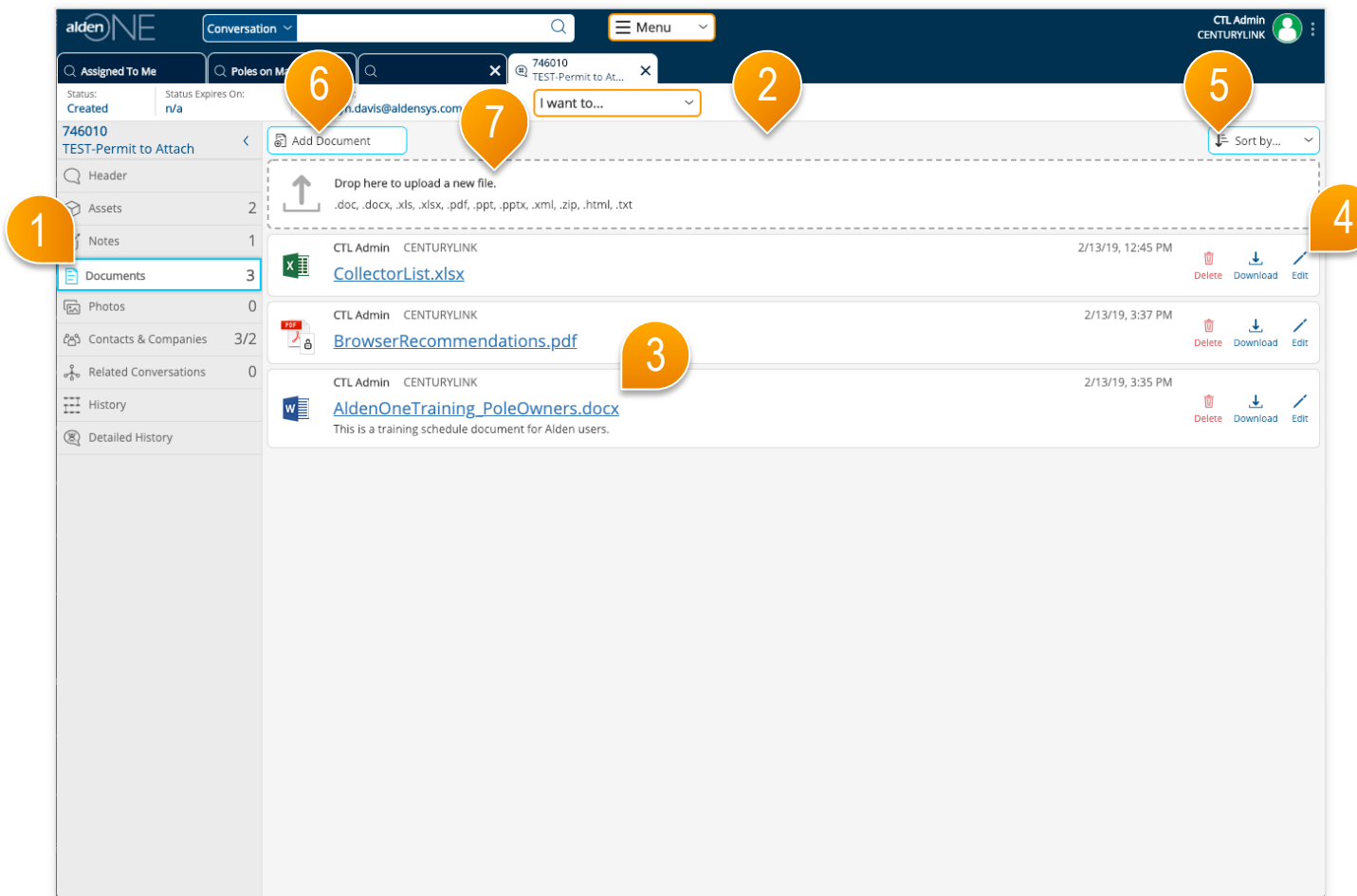
ALDEN SYSTEMS, INC.
Company Contact Name: Notify Support
Company Contact Email: notifysupport@aldensys.com

CENTURYLINK
Company Contact Name: Marcy Aguon
Company Contact Email: Marcy.Aguon@centurylink.com

Cancel Save

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- ① Enter your note text, or modify existing note text if editing a note.
- ② Click either Public or Private to set the security on this note. The selected option has a light blue icon. When you select Is Private, other options for contact and company permissions are displayed.
- ③ The existing contacts and companies are listed. You can share a note with one or more contacts or companies. By default, a private note is not shared with any contacts or companies. Select the Shared option beside each user or company that you want to be able to view this note. Select the Private option beside each user you do NOT want to be able to view this note. The selected option for each user has a light blue icon.
- ④ Enter a new contact on the conversation by typing the user name or email address, then click the add button to the right of the Add Contact field. Similar options are available to add companies to the conversation.
- ⑤ Click "Save" to save your changes and add the note.



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- ① Click the Documents tab to move to the conversation documents section. The count of documents is shown in the tab.
- ② You can view all documents on the conversation except those that someone has marked private that are not intentionally shared with you or your company. Documents that you have marked private are indicated with a lock icon on the right of the document.
- ③ Each document indicates the filename and extension of the document, the user that added the document and their company, and the date the document was last modified. If a description was entered, it appears below the document filename.
- ④ You can delete or edit document information only for documents that you added. You can also save a document to your desktop. To edit a document's content, save the document to your desktop, make changes, then upload it to Alden One again.
- ⑤ Use the Filter option to change the sort order of the documents.
- ⑥ Click Add Document to upload a new document. Refer to the help topic Conversation – Add, Edit, & Share Documents for more information.
- ⑦ You can also drag a file from your desktop into the area outlined by the dotted line.

Conversation – Add, Edit, & Share Documents

Edit Document

1

2 **Add Description (optional)**
This is our document with browser recommendations. Please follow the guidelines in this document.

☒ **Public** - Only people/companies on this conversation can view.
☐ **Private** - Select people/companies who can view.

Who can see this?

3 **Contacts**

chris burton
Company: ALDEN SYSTEMS, INC.
Username: cburton
Email: cburton@aldensys.com
☒ Shared ☐ Private

4 **Jacquie Davis**
Company: ALDEN SYSTEMS, INC.
Username: jdavis
Email: jacquelyn.davis@aldensys.com
☐ Shared ☒ Private

Companies

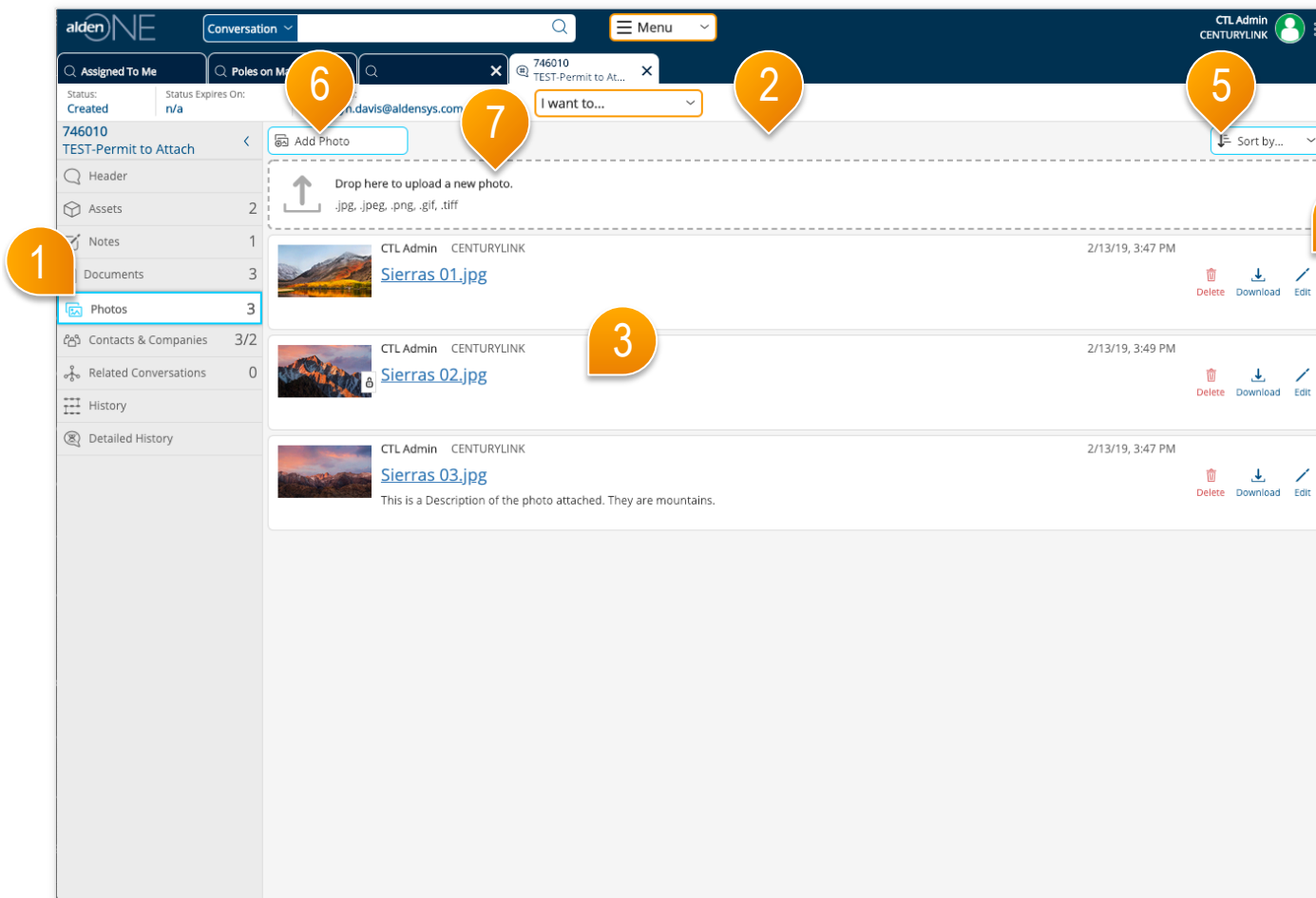
ALDEN SYSTEMS, INC.
Company Contact Name: Notify Support
Company Contact Email: notifysupport@aldensys.com
☒ Shared ☐ Private

CENTURYLINK
Company Contact Name: Marcy Aguon
Company Contact Email: Marcy.Aguon@centurylink.com
☐ Shared ☒ Private

5

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- 1 Enter a document description if desired, or modify existing description text if editing a document.
- 2 Click either Is Public or Is Private to set the security on this document. The selected option has a light blue icon. When you select Is Private, other options for contact and company permissions are displayed.
- 3 Enter a new contact on the conversation by typing the user name or email address, then click the add button to the right of the Add Contact field. Similar options are available to add companies to the conversation.
- 4 The existing contacts and companies are listed. You can share a document with one or more contacts or companies. By default, a private document is not shared with any contacts or companies. Select the Shared option beside each user or company that you want to be able to view this document. Select the Shared option for any contact you would like to share this document with.
- 5 Click "Save" to save your changes.



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- ① Click the Photos tab to move to the conversation photos section. The count of documents is shown in the tab.
- ② You can view all photos on the conversation except those that someone has marked private that are not intentionally shared with you or your company. photos that you have marked private are indicated with a lock icon on the right of the photo.
- ③ Each photo indicates the filename and extension of the photo, the user that added the photo and their company, and the date the photo was last modified. If a description was entered, it appears below the photo filename.
- ④ You can delete or edit photo information only for photos that you added. You can also save a photo to your desktop. To edit a photo's content, save the photo to your desktop, make changes, then upload it to Alden One again.
- ⑤ Use the Filter option to change the sort order of the photos.
- ⑥ Click Add photo to upload a new photo. Refer to the help topic Conversation – Add, Edit, & Share photos for more information.
- ⑦ You can also drag a file from your desktop into the area outlined by the dotted line.

Conversation – Add, Edit, & Share Photos

The screenshot shows the 'Edit Photo' dialog box with the following elements and numbered callouts:

- 1** Points to the filename field containing 'Sierras 03' and the file extension '.jpg'.
- 2** Points to the 'Add Description (Optional)' section, which contains a text area with the placeholder text 'This is a Description of the photo attached. They are mountains.'
- 3** Points to the 'Public' radio button option under the 'Who can see this?' section.
- 4** Points to the 'Private' radio button option under the 'Who can see this?' section.
- 5** Points to the 'Save' button at the bottom right of the dialog.

The 'Who can see this?' section includes a list of contacts with 'Shared' and 'Private' options for each. The contacts listed are 'chris burton' and 'Jacquie Davis', both associated with 'ALDEN SYSTEMS, INC.'.

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- ① Enter a photo description if desired, or modify existing description text if editing a photo.
- ② Click either Is Public or Is Private to set the security on this photo. The selected option has a light blue icon. When you select Is Private, other options for contact and company permissions are displayed.
- ③ Enter a new contact on the conversation by typing the user name or email address, then click the add button to the right of the Add Contact field. Similar options are available to add companies to the conversation.
- ④ The existing contacts and companies are listed. You can share a photo with one or more contacts or companies. By default, a private photo is not shared with any contacts or companies. Select the Shared option beside each user or company that you want to be able to view this photo. Select the Shared option for any contact you would like to share this photo with.
- ⑤ Click "Save" to save your changes.