



#FloQast



FLOQAST APP FOR MS TEAMS QUICK-START GUIDE

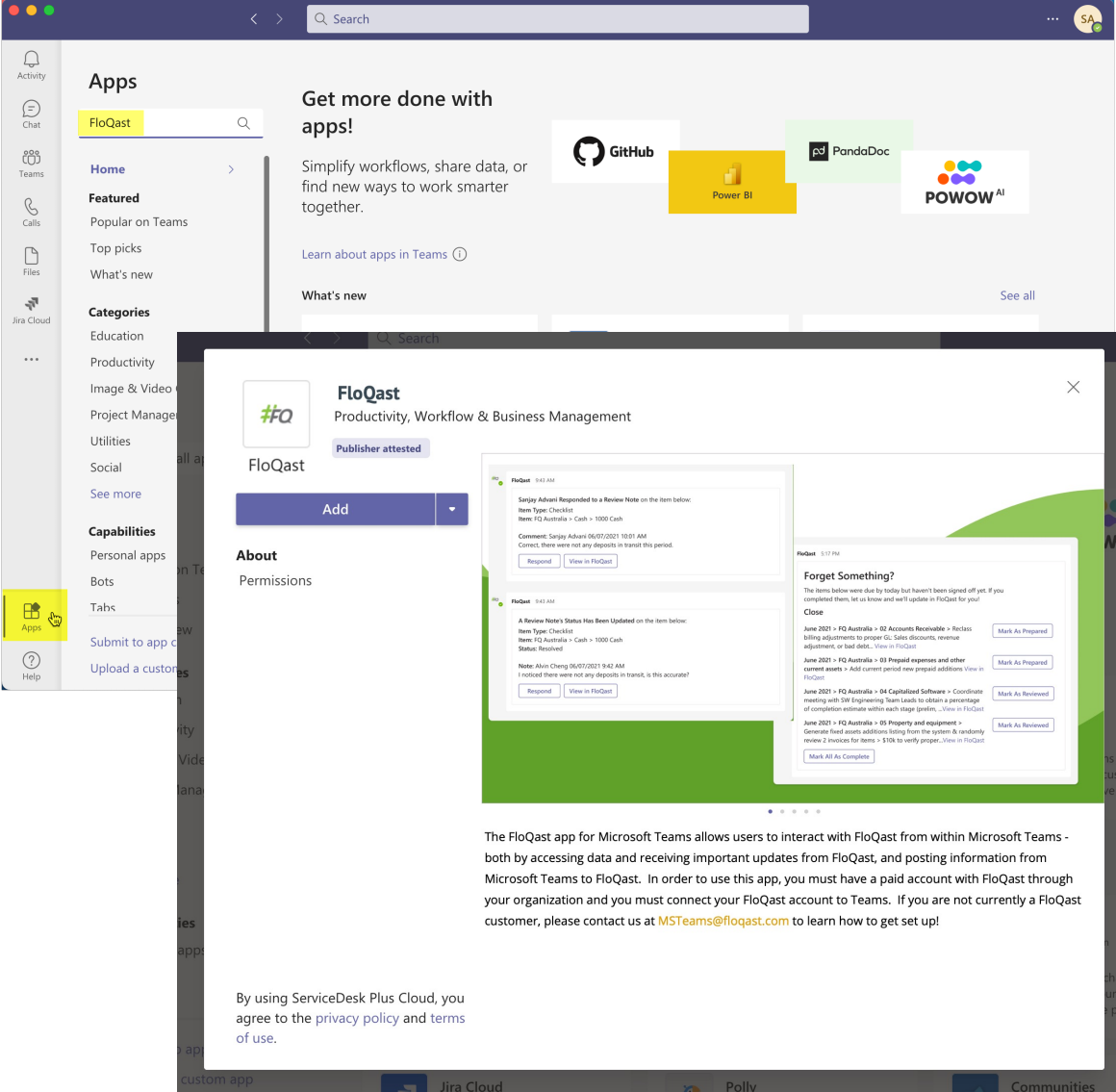
How to find, download, and install the FloQast app in Microsoft Teams

August 2021



INSTALLING THE FLOQAST APP

1. Open Floqast.app and log into your FloQast account
2. Next, open your Microsoft Teams app (desktop or web app)
3. Click the Apps icon (bottom of left pane) in Teams and type “FloQast” in the Search Bar
4. Click the FloQast icon, and then Click the “Add” Button
5. After successful Installation you will receive a Welcome Message from the FloQast Bot
6. Click the “Connect Your FloQast Account” button
 - *This will open link to the Floqast.app home page. If you get the login screen, then please enter your FloQast credentials to log in.*
7. Once you are successfully logged into FloQast, you should receive a message in Teams notifying you of a successful connection!



The screenshot displays the Microsoft Teams interface. On the left, the 'Apps' search bar contains 'FloQast'. The main pane shows the 'FloQast' app card with a '#FO' icon, 'Productivity, Workflow & Business Management' description, and an 'Add' button. Below this, there are sections for 'About' and 'Permissions'. A large modal window is overlaid on the app card, showing a list of recent messages from the FloQast bot. The messages include: 'Sanjay Advani Responded to a Review Note on the item below:', 'A Review Note's Status Has Been Updated on the item below:', and 'Forget Something?'. The 'Forget Something?' message lists several items due for review, such as 'June 2021 > FQ Australia > Q2 Accounts Receivable', 'June 2021 > FQ Australia > Q3 Prepaid expenses', 'June 2021 > FQ Australia > Q4 Capitalized Software', and 'June 2021 > FQ Australia > Q5 Property and equipment'. At the bottom of the modal, there is a link to the privacy policy and terms of use.

The FloQast app for Microsoft Teams allows users to interact with FloQast from within Microsoft Teams - both by accessing data and receiving important updates from FloQast, and posting information from Microsoft Teams to FloQast. In order to use this app, you must have a paid account with FloQast through your organization and you must connect your FloQast account to Teams. If you are not currently a FloQast customer, please contact us at MSTeams@floqast.com to learn how to get set up!

By using ServiceDesk Plus Cloud, you agree to the [privacy policy](#) and [terms of use](#).

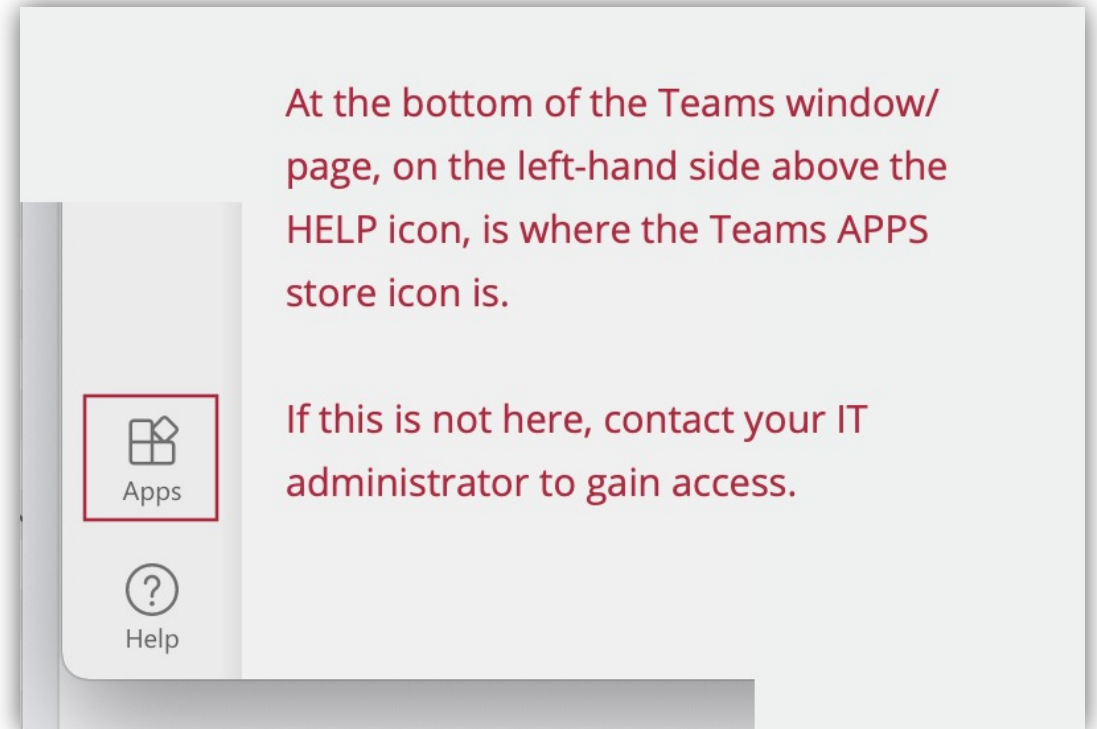
INSTALLATION ISSUES

I Don't See the “Apps Icon” in Microsoft Teams?

If the Apps icon is not visible, it's likely because your organization's IT administrator has it hidden.

What To Do: Reach out to your IT Admin

Your IT administrator can enable this access for your organization. Another option they may pursue is to remote install the Floqast app for you.



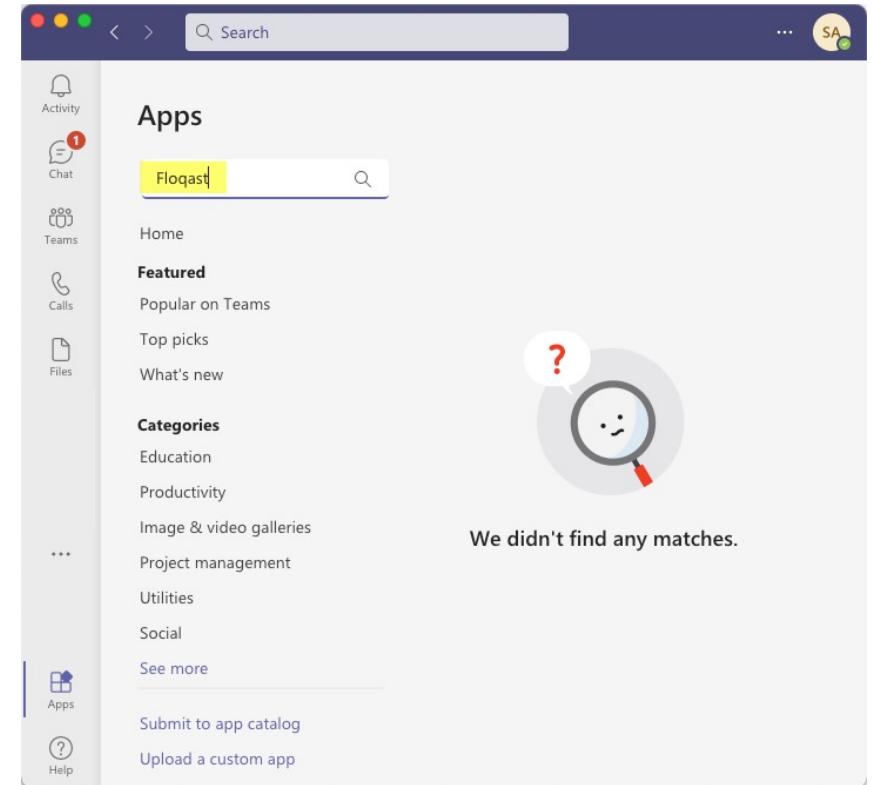
INSTALLATION ISSUES

I Searched for the FloQast app in the App Store but I Can't Find It?

If you run a search and get zero search results for the FloQast app, then follow these steps:

1. Completely sign out of your Teams account
2. Quit/shut down the Teams app.
3. Sign into Teams again
4. Click on the Apps icon and search for “FloQast” in the search bar

The FloQast app should be listed as the only search result. If it STILL does not come up in the search, it's likely that the app may be blocked by your IT Administrator. **Please reach out to your IT Admin**



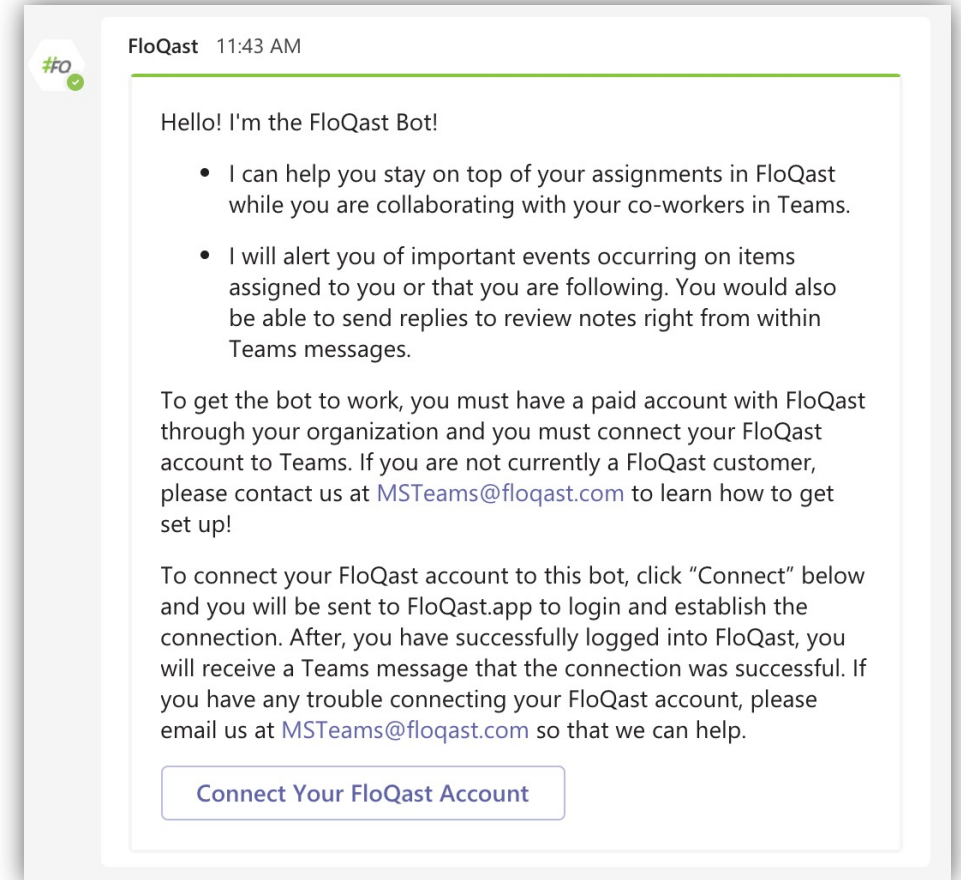
CONNECTING TO FLOQAST

I've Installed the App in MS Teams. How Do I Connect It to FloQast?

Follow these steps in MS Teams, in the FloQast thread:

1. Click on the CONNECT YOUR FLOQAST ACCOUNT button (this button is automatically displayed upon installing the FloQast app)
2. This will send you to the Floqast.app web login page.
3. Enter your credentials to log into FloQast.
4. Once you're successfully logged in, Teams will detect this login and establish the connection immediately (and send you a confirmation message)

If your company uses Single Sign-On authentication, then when directed to the Floqast.app login page, simply use your SSO login process as normal - the Teams app is "listening" for a successful login, regardless of whether you do this manually or via SSO.

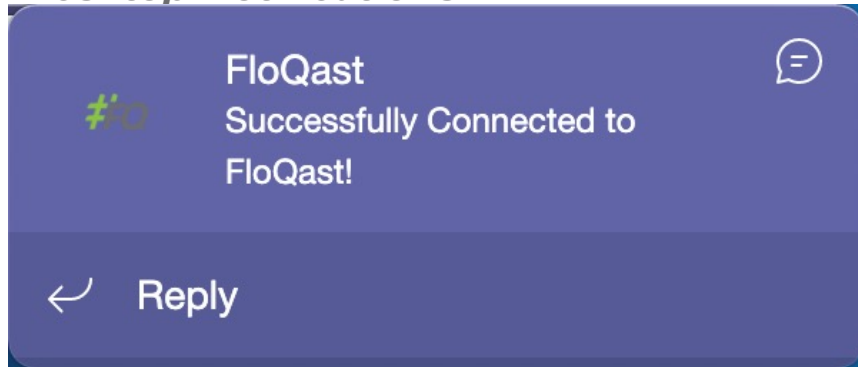


CONNECTION CONFIRMATION

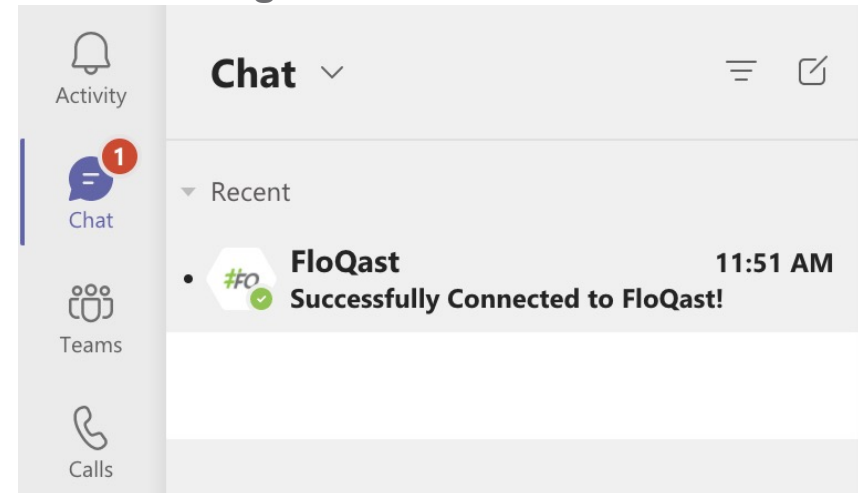
How Do I Know If I'm Connected?

Upon successfully connecting to a valid Floqast user account, you should receive a confirmation message from the FloQat Bot in Microsoft Teams

Desktop Notifications



Chat Message



MANAGING NOTIFICATIONS SETTINGS

How Do I Select Which Notifications I Want to Receive?

NOTIFICATION	EMAIL	SLACK	TEAMS
Close Progress Receive a notification summarizing your close status <input checked="" type="radio"/> Daily <input type="radio"/> Weekly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Review Notes Receive a notification when a review note that you are associated with is assigned, edited, or resolved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reconciliations Receive a notification when a reconciliation that previously tied-out is out of balance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Late Messages Receive a notification when an item is late	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ready for Review Receive a notification when an item you are assigned to is ready for review	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Followed Items Receive a notification when an item you are following changes status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sign-off Reminder Receive a notification at the end of the workday for you checklist items that are "due today" but not signed off yet. This is for assigned Checklist items only			<input checked="" type="checkbox"/>
Newly-Material Fluctuations Receive a notification when there is a material fluctuation on a Flux report that needs an explanation/signoff (for an account or group you are assigned as a Preparer)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

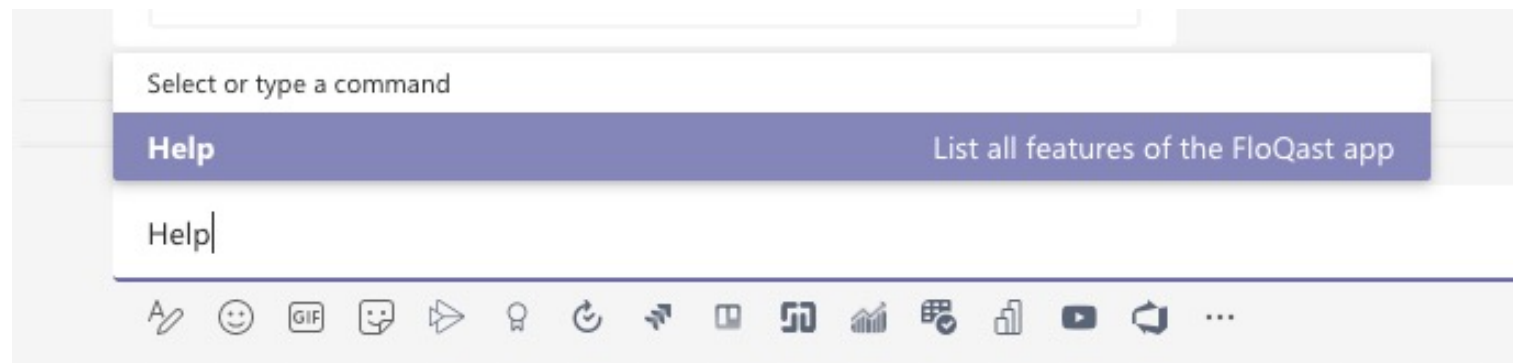
Once the Teams app is connected to your FloQast account, the option to manually configure MS Teams Notifications becomes available in your Notifications Settings located on your Profile Settings page.

As a reminder, you can get to this page by clicking on your avatar at the top-right corner of any page in FloQast. Or you can just click here <https://www.floqast.app/settings/user>

PRODUCT SUPPORT

Two Ways To Get Help:

1. Installation or Connection issues? Email us! MSTeams@floqast.com
2. Need to explore the app's functionality? Inside MS Teams, in the Floqast app's message thread or channel, type "help" into the chat bar.



MS TEAMS NOTIFICATIONS

Below are the notifications currently available for Microsoft Teams (as of August 2021)

Core App Messages

1. Daily/Weekly Close Progress
2. Review Notes
3. Recs Out of Balance
4. Late Items
5. Item Ready For Review
6. Followed Items
7. Signoff Reminder *New*

Flux Analysis Messages

1. Newly-Material Fluctuations
2. Material Flux Amount Changes
3. Flux Item is Ready For Review
4. Flux Report is Ready For Review
5. Flux Items Due Soon (this week)
6. Late Flux Items

TEAMS “COMMANDS”

The FloQast Bot understands three simple commands that will display your assigned FloQast items that are either due today, due tomorrow, or even past due for *any* workflow across the last, current, and next periods

Commands	
CONNECT	Type "connect" to connect your FloQast account to MS Teams
DISCONNECT	Type "disconnect" to disconnect your FloQast account from MS Teams
TODAY	Type "today" to get a list of all your items due today
TOMORROW	Type "tomorrow" to get a list of all your items due tomorrow
LATE	Type "late" to get a list of all your late items
HELP	Type "help" to get this Help message again at any time



#FloQast

#FQ

