



# Kaleidoscope Platform

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## *User Guide*

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**kaleidoscope™ 2.0**  
technology-driven marketing



## Table of Contents

• Recommended Web Browser	<a href="#">Page 3</a>
• Logging in to Kaleidoscope	<a href="#">Page 3</a>
• Adding Outputs	<a href="#">Page 4</a>
• Output Types	<a href="#">Page 4</a>
• Editing & Renaming Outputs	<a href="#">Page 4</a>
• What content can be included per Output	<a href="#">Page 4</a>
• Uploading your own photos	<a href="#">Page 5</a>
• Upload your own videos	<a href="#">Page 7</a>
• Adding a web video to my library (YouTube or Facebook)	<a href="#">Page 7</a>
• How to publish content to an output	<a href="#">Page 7</a>
• How to post to Facebook or Twitter OR to BOTH	<a href="#">Page 7</a>
• How to add content to a WordPress Playlist	<a href="#">Page 8</a>
• Digital Sign Outputs	<a href="#">Page 9</a>

### **Layouts: Types & Adding Content to Outputs**

• Preset Layouts	<a href="#">Page 13</a>
• Blank Layouts	<a href="#">Page 14</a>
• My Layouts	<a href="#">Page 18</a>
• Custom Layouts	<a href="#">Page 18</a>



# Kaleidoscope Platform

## *User Guide*

## Which web browser should I use?

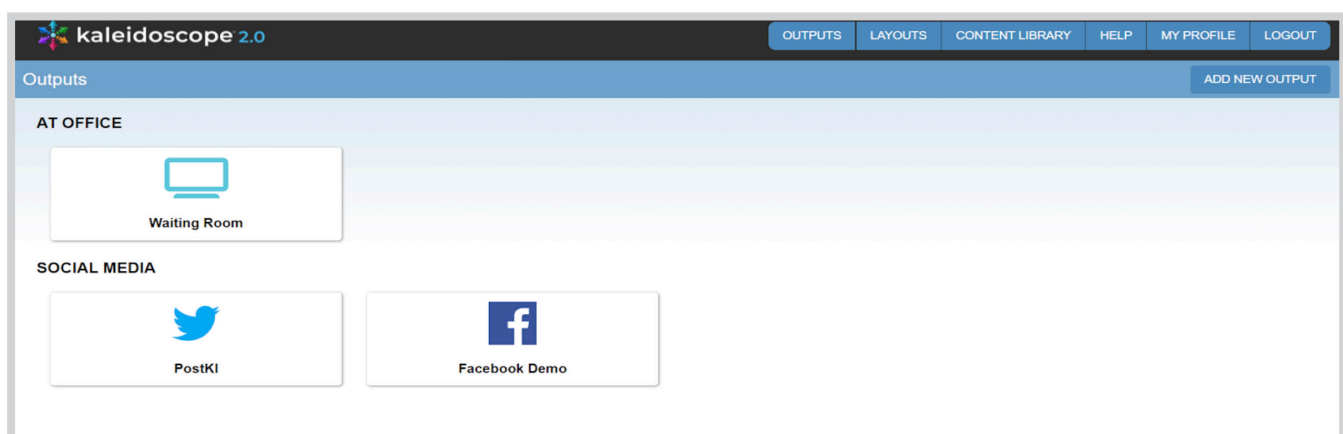
Firefox or Google Chrome are the recommended web browsers when using Kaleidoscope.

## How To Log in to Kaleidoscope

1. Go to <https://client.thekaleidoscope.com/>
2. Enter your unique ID and Password

## Outputs Page

This is where you will land when you log in. You can see all of your active outputs here and can click in to any one of them to see the content.





## Adding Outputs

From the Outputs page click the **Add New Outputs** button in the upper right. If you reach your paid output limit a pop-up notice will come up, contact us to add more outputs.

## Output Types

There are 2 types of outputs within Kaleidoscope; posts & playlists.

### 1. Post Outputs include: Facebook & Twitter

- These outputs require a specific date and time for the scheduled post as well as a caption. Content will post from Kaleidoscope to the output on at that specified date / time.
- Content will NOT post until caption is applied. You can set the caption within the outputs page and it will notify you that a caption is missing.



### 2. Playlist Outputs include: Digital Signs & WordPress

- These outputs include a sequence in which the content displays. Things can display all the time or be scheduled to only display over a specific date range.



## Editing & Renaming Outputs

To edit or rename your outputs go to **My Profile > Outputs**.

You will see a list of outputs. You can edit the names via the pencil button. 

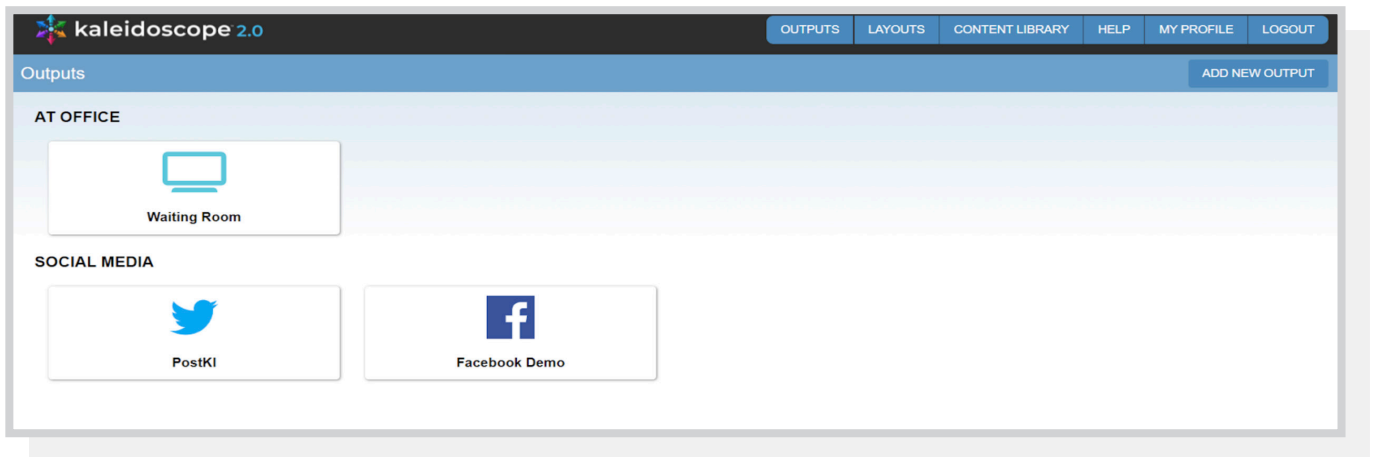
## What content can be included per Output

- **Digital Signs:**
  - Designed Layouts with any combination of elements; images, text, videos, web videos (YouTube & Facebook), feeds (both text and web), and weather.
  - Images can be dynamic and change within an image box
- **Facebook & Twitter:**
  - Images
  - Videos
  - Web Videos (YouTube & Facebook)
  - Layouts with one static image, text or a combination of both.
- **WordPress:**
  - Images
  - Layouts with one static image, text or a combination of both.

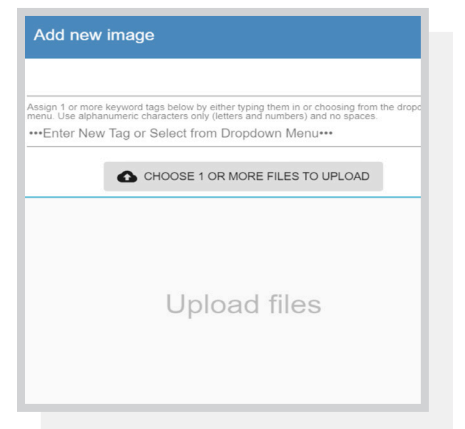
**Important Note:** Only outputs that are compatible with the content you are trying to add will show.

## Uploading Your Own Photos

1. Log in to your account
2. After logging in this is what you will see.



3. Click Content Library
4. You should land on the **MY LIBRARY** tab (it will show in dark blue if selected). This is where you can add new photos to your Kaleidoscope library.
5. Click **Add Image** in the upper right corner of the screen.
6. Then, click the **CHOOSE 1 OR MORE FILES TO UPLOAD** button
  - a) You can upload either one or multiple photos at one time.
  - b) Reminder, when you upload multiple images, they should all be the same type of photos (i.e. all from the same event, all staff photos, all patient photos etc.) as they will be given the same keyword tag(s) and title.
  - c) To select multiple photos on your computer, use these common keystroke shortcuts.
    - i) MAC: Hold down the command button, click all preferred photos you would like to upload.
    - ii) PC: Holding down the Ctrl key, click all preferred photos you would like to upload. Your images will automatically be assigned the proper orientation (horizontal or vertical).
7. **Enter a title** for the images(s). Be sure to enter a title that makes sense to your office. This will help you search for the images in the future and quickly delete them if you'd like.  
**Example: If you are uploading a single staff portrait, title it as follows:**
  - Staff - name of the Team member
  - Ex: Staff - Lucy (for a single photo)



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**If you are uploading multiple staff portraits at once, give a more generic title:**

- Ex: Staff Portraits January 2019

**If you are uploading patient appreciation party photos, you can title them: 'Patient Appreciation Party: Location, Year'**

- Ex: 'Patient Appreciation Party - Water Park 2016'

- 8. Assign keyword tag(s)** - from the **"Enter New Tag Or Select From Dropdown Menu"**. Keyword tags are very important and will allow you to select photos to fill into your layout photo boxes. This is how your Kaleidoscope images are categorized and then assigned to Layouts.

Create and apply keyword tag(s) by typing in the keyword like shown in the picture below. When applying a keyword tag, add a word(s) with **no spaces**.

If a keyword is existing, select it from the dropdown. If you are creating a new tag, type in the keyword and click **create**.

More than one tag may be assigned. This will let you create layouts that include all your photos from a specific event, holiday, a group of photos from a one-year period, etc.

**Example:** If you are uploading a staff portrait, apply a tag of 'staffportrait'. Then when creating a layout that will use photos with staff portraits the keyword tag will allow you to locate and access that group of photos to include in that layout.

**Example of Multiple Tags:**

If you are uploading patient appreciation party photos, it would be a good idea to apply multiple tags.

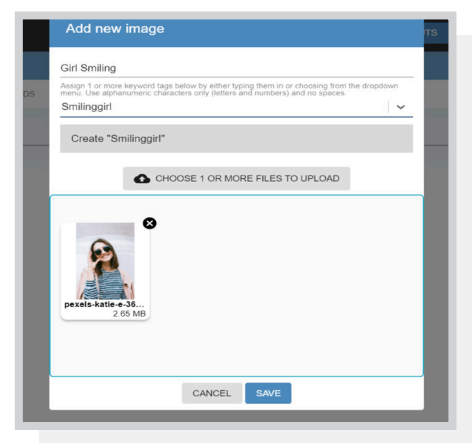
**Example:** Tag 1: patientappreciationparty Tag 2: patientappreciationparty2019

This will allow you to assign all patient appreciation photos from all years in a layout or just the ones from 2019.

**Important Note:** If you assign an existing tag to a group of photos, the new photos will automatically flow into Playlist to any layout with that keyword tag assigned.

**Example:** If you created a layout and assigned the keyword tag **patientappreciationdayjan2019...** then a week later uploaded 10 more photos to your CONTENT LIBRARY and assigned the same tag. Those 10 photos would automatically flow in to any layout with that tag assigned. No further steps are needed unless you would like to create another layout with these photos.

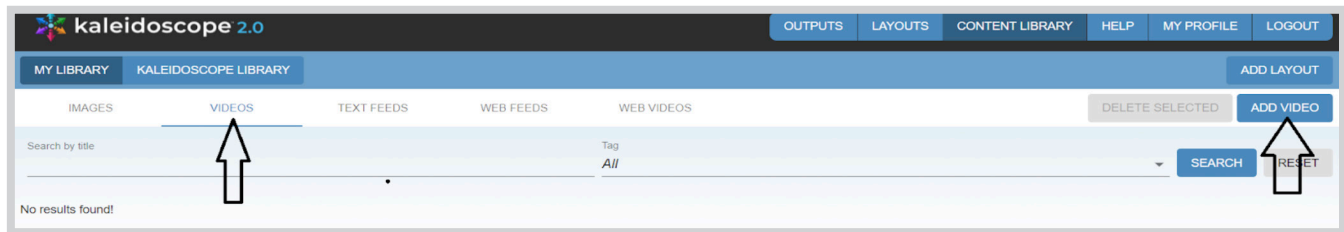
9. Click **'Save'** ... now the photo will be in your library ready for you to access when creating a layout.





## Upload Your Own Videos

1. How to upload the your own videos will be have same process as **how to upload the images**, just make sure that you are on the video tab within Content Library > My Library.



## Adding a Web Video to My Library (YouTube or Facebook)

1. Go to **CONTENT LIBRARY**
2. Click on My Library
3. Then go to **WEB VIDEOS**
4. Click **ADD WEB VIDEOS**
5. Then input the **TITLE** and **LINK** to the Video
6. Then click **Save**

## How to publish content to an output

There are various ways to add content to an output.

1. Within the output page itself (buttons in upper right corner)
2. From both the Layouts and Content Library
  - a) Layouts: click the + button
  - b) Content Library: click the pencil button

**More details in following sections.**

## How to post to Facebook or Twitter OR to BOTH

1. Go click the **OUTPUTS**
2. Click the **Facebook** or **Twitter output** (depending on where you want to post it)
3. Click the media you want to post in the upper right corner:
  - **ADD IMAGE**; to post a static image.
  - **ADD VIDEO**; to post a video you uploaded or one from the Kaleidoscope library.
  - **ADD WEB VIDEO**; to post a YouTube or Facebook video link
  - **ADD LAYOUT**; to post a layout with a static image, text or combination of both.



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4. Select where you want to get the media from, whether it's from **MY LIBRARY OR KALEIDOSCOPE LIBRARY**.
5. Select the item you want to post
6. Then Select the Day and time when you want to post
7. Click **ADD SELECTED TO OUTPUT** in the upper right corner
8. Then you will see the content saying **Caption Missing**. To add a caption to that click the **PENCIL ICON** at the lower right corner of the image.
9. Check the boxes of the outputs you want to post to; either Twitter or Facebook OR if you want to post the image on 2 of your social media accounts then you can check both.
10. After checking the box the layout will expand and you will see a **Post Caption**. You can then type your caption there. If you are posting to multiple outputs and want the caption to be same you can enter one caption in the top box and click **APPLY TO ALL**.
11. Then click **Save**

**Facebook - Important Note:** Facebook posts can only go to pages. Facebook won't allow posts to stories from outside APIs like Kaleidoscope.

## How to add content to a WordPress Playlist

1. Go click the **OUTPUTS**
2. Click the **WordPress** output
3. Click the media you want to post in the upper right corner:
  - ADD IMAGE; to post a static image.
  - ADD LAYOUT; to post a layout with a static image, text or combination of both.
4. Select where you want to get the media from, whether it's from **MY LIBRARY OR KALEIDOSCOPE LIBRARY**.
5. Select the item you want to publish
6. Click **ADD SELECTED TO OUTPUT** in the upper right corner
7. To **add a scheduling date range**: Click the **PENCIL ICON** at the lower right corner, click the WordPress Output and add your dates there. If you want it to repeat each year check the **Repeat Yearly** box.
8. Then click **Save**



**To change the order of your playlist**, click **EDIT LAYOUT ORDER** and either drag and drop or enter the desired layout position.

**Publishing Changes:** If you make changes to your WordPress Playlist click the REFRESH WEBSITE button to display changes to your Playlist on your WordPress website.

- Cache needs to be cleared to reflect changes per WordPress' setup. This button will clear cache on your website if your webadmin has one of the following caching plug-ins installed:
  - WP Fastest Cache
  - WP Optimize
  - WP Rocket

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- WP Super Cache
- W3 Total Cache
- If you press this button and don't see the changes on your website within a few minutes, contact your WordPress webadmin and ask them to clear cache within the WordPress admin portal for you. This is a requirement of WordPress.
- Please also ask your webadmin which WordPress caching plug-in is being used and let us know so we can see if it is possible to include automatic updating within the Kaleidoscope Platform.

## Digital Sign Outputs

### Adding Content

1. Go click the **OUTPUTS**
2. Click the **Digital Sign** output you want to add new content to
3. Click ADD LAYOUT in the upper right corner
  - a) For Preset, Blank and My Layouts click the monitor button with the + (**see the layout section for more information**)
  - b) For Custom Layouts create it right from the editor (**see the Custom Layouts section for more information**)

### Playlist - 2 Views

There are two views you can work in here:

**View 1:** You can view all content that is scheduled to display currently and in the future on your display. Any layout can be edited here or moved to a new location. [Point out a few examples of layouts with banners that are scheduled vs. layouts without banners that always will display.](#)

**View 2:** This view can be used to edit any layout within one screen. Scroll or jump to any desired layout in your playlist, click the pencil button and the chosen layout can be edited without any additional steps.

### New Layouts

Any new layouts you create and add will be at the bottom of your Playlist

### Changing Layout Order:

Move things around to adjust when they show up within the sequence by clicking **EDIT LAYOUT ORDER**. Then drag & drop them into the desired place. Or you can enter the position of where you'd like the layout to go.

### Scheduling / Add Date Range(s)

Assigning dates is useful when you have a contest or promotion that you do at certain times of the year. You are able to schedule these to come up and go away on the dates you want them to. Then, it keeps you from having to remember before the actual event, to go and post a layout about it in your Playlist.

Holiday and Seasonal content will be pre-scheduled for you.



## Linking Layouts

To group layouts together so they don't get split up click the layouts you want to link, the border will turn green & it will populate the **LINK LAYOUT** button. Click this to link the layouts.

Note: the layouts have to be next to each other to link them together. If they aren't click the **EDIT LAYOUT ORDER** button to adjust before linking.

## Filters / Search Bar

Filters have been included within your playlist to create an improved user experience. You can find these filters along the top filter bar under the Type dropdown. This dropdown is to the far right, to the left of the blue SEARCH button.

You can also search by keyword or title.

### You can filter by:

- Incomplete Layouts (Use this to find pending layouts so they can be completed or edited prior to updating the display)
- Scheduled in Future (Use this to see all content coming up in the future and when it is scheduled)
- Scheduled in Past (Use this to view all content scheduled in the past. You can quickly remove old content or edit so it can display again)
- View Repeated Layouts (Use this to quickly edit or remove any copies no longer needed)



## Date Filter Fields

This is just a way to sort through to see what you have running at certain times. You can do this by date (ie. "I would like to see what I have running during the holidays".) Simply enter the dates you're searching, and you'll notice that all other Fall, Spring, Summer layouts go away and you only see what you have running during the month of December in this case.

## Preview Sequence within Your Account Online:

Preview your entire layout sequence or any portion of it within your Kaleidoscope account online to easily review your content. Simply press the play button in the upper right corner of your playlist and all content will start to preview. If you'd like to preview a few layouts, simply click the layouts you'd like to preview and then press play.

## Buttons Under Each Layout Thumbnail:

### Duration

Can change the time a layout will display

### Recommendations: *(varies based on audience and location of digital sign)*

- 10 - 15 seconds for layouts with static text (no changing elements)

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- 20 - 30 second (changing photos)
- 30 - 60 seconds (feeds)
- Recommend max of 60 seconds as this can be quite long on the screen but of course each office is different and may prefer less or more time
- Videos to fit the time of the video

**Play Button / Preview:** Click the play button icon to see a preview of the preferred layout larger.

**Important note:** Some layouts may show in a lower quality for preview purposes. It should not show like this on the display unless the file uploaded was flagged as low resolution.

**Changing Transitions:** Click the button with 4 squiggly lines to change the transition between 2 layouts.

**Increase Frequency:** Click the icon that looks like 2 pieces of paper with a plus sign. This will make an exact copy of that layout. This feature is good because it allows for important information to be seen by everyone throughout a typical day in your waiting area.

**Choose from 2 options:**

- Repeat every X layouts
- Repeat every X minutes

• **Important Note:** When you edit the repeating properties on current layouts, all old copies will be removed, and new copies will be included per the new settings. This helps change repeating layouts quickly and accurately.

• **Important Note:** Instead of having a layout stay up for a long duration (60+ seconds), why not use this feature and have it show up more frequently. This keeps people from becoming bored looking at one layout for a long time.

**Edit Layout:** Click the pencil button to edit properties or content of a layout. This will look the same as previously shown.

## Additional Features - Digital Sign Playlists:

- **Disabling Layouts (temporality):** There might be certain times clients want to display just a few/ certain layouts in their Layout Sequence (ie. Just Layouts about their practice, or Industry Related Layout for an Open House / Event etc.) and then go back to their normal sequence.

They can temporarily disable any layout by clicking the layout(s) they'd like to disable. After all layouts they'd like to disable are clicked and have a green border around them, then click **'Select Action'** dropdown in top left & select **'Disable'** in the dropdown.

It will ask to confirm the action.

Click **update display** when you are done.

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**Important Note:** If you want to disable most of the layouts in their sequence and only keep a handful active, to save time they can click the 'disable all' button in the upper right corner, then just click on the layouts they want to re-enable

To re-enable layouts, you can click an individual layout to then re-enable or click the **blue Enable All Layout** button at the top to save time

- **Apply Action to Multiple Layouts:** Click all the layouts you'd like to apply an action to. They will have a green border, then click the **Select Action** drop down (upper left corner) & choose the action you'd like to perform. It will prompt you if you are sure if you would like to proceed with this action.
- **Update Display Button:** It's important, once you've made all the edits you're going to make, to click this green button. This simply pushes all your changes/edits to your Kaleidoscope screen within about an hour. If the button is grey, you know you haven't made any changes that require the push.

**Important Note:** If for some reason you get a message that says, "YOU CANNOT COMPLETE, INCOMPLETE CONTENT", then you'll know that somewhere in your sequence, a layout is missing some content. Maybe you forgot to add a photo or insert text, but in order to update your Sequence, you must either delete that layout, or finish it. This just prevents you from updating your screen and having incomplete layouts show up.

You can either delete the layout & work on it later (it will be moved into **My Layouts** OR click the disable button & it will be temporarily disabled & when they are ready to finish assigning the content they can re-enable the layout (2nd option is much quicker / simpler).

## Instant Playlist

Use this feature to instantly display layouts within 5 – 10 minutes. You can instantly display any existing layouts or any new layouts you create.

The layout will just interject where it is in the sequence, then it will go back to normal.

To add to your Instant Playlist:

1. Click INSTANT PLAYLIST
2. Click ADD LAYOUT
3. Choose which type of layout you want to add (Preset, Blank or My Layout) > select and click **ADD SELECTED TO INSTANT PLAYLIST**



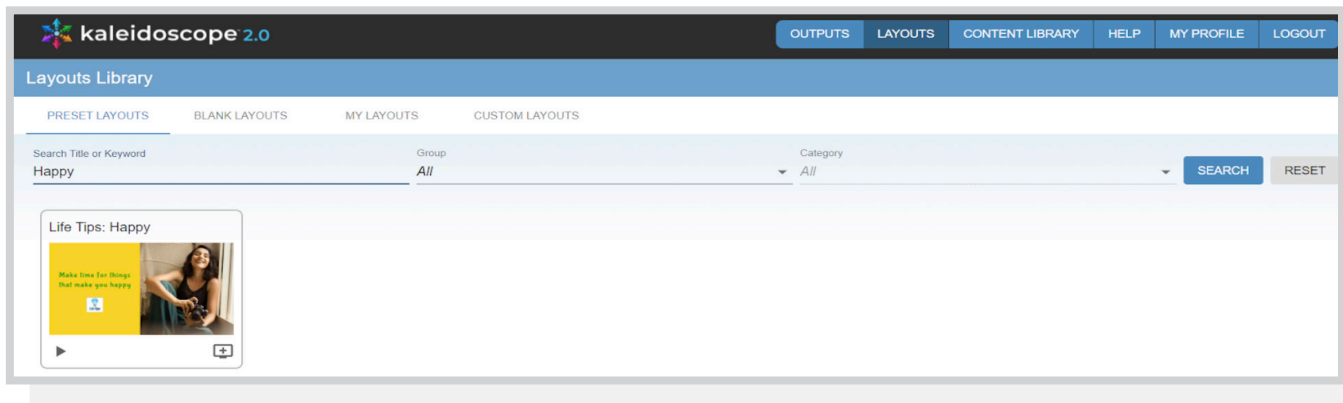
## LAYOUTS: TYPES & ADDING CONTENT TO OUTPUTS

### Preset Layouts

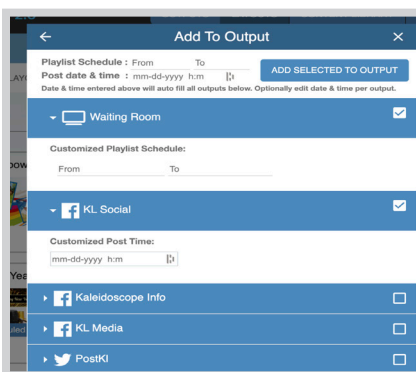
These layouts are all pre-designed and ready to be added directly, as is, to your output(s).

#### To add to your Outputs:

1. Go to **Layouts**
2. Click **Preset Layouts**
3. You can search for the Title or Keyword, Group or Category



4. You can click the **PLAY** button at the lower left side of the photo to view it.
5. To add/post the layout on any eligible output, click on the monitor logo with the + on the lower right corner of the photo.
6. Check the boxes for the eligible outputs you'd like to add the layout to

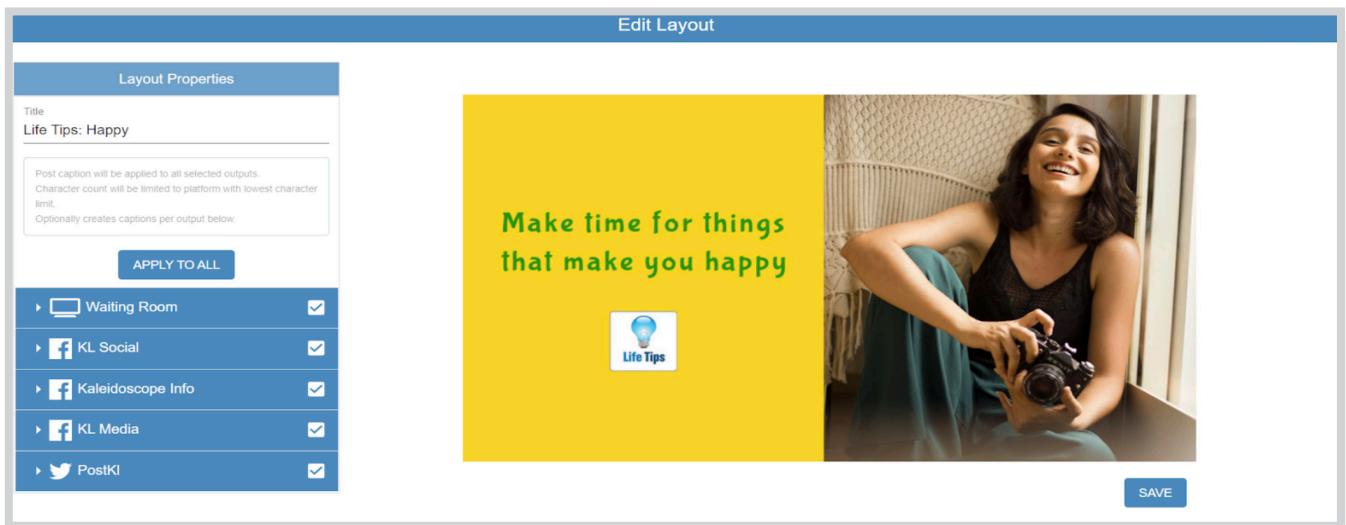


7. **Scheduling:**
  - **For post outputs:** Choose a date and time to schedule the post
  - **For playlist outputs:** You can add a date range if this is something you'd like to schedule or leave dates off and it will display all the time.
8. After setting up the scheduling click **ADD SELECTED TO OUTPUT**
9. You will see a notification on your lower left corner of the screen **Layout added to Output(s)**

## For Post Outputs:

You will need to add a caption within the Output page before the layout can post.

1. Click Outputs > select the output you added the layout to (Facebook or Twitter). If you added it to both you can just click in to one of the Outputs to apply captions for both Outputs.
2. You will see the content saying **Caption Missing**. To add a caption to that click the **PENCIL ICON** at the lower right corner of the image.
3. You can add the caption in the White Box. If you are posted to multiple outputs and want the caption to be same you can enter one caption in the top box and click **APPLY TO ALL**.
4. Once you're done, Click **SAVE**
5. You will receive a notification at the lower left corner of your screen saying **Post(s) Updated**. Then you can click the "X" on the upper right corner to exit from the edit Layouts.
6. You will then see that your photo has been scheduled and it now has a Caption.



## For Playlist Outputs

The layout will be added to the end of your sequence. You can click in to the output and click EDIT LAYOUT ORDER to move the layout either via drag and drop or entering the desired position number.

## Blank Layouts

Here we have a variety of pre-designed blank templates for you to choose from. You will find everything from contests, before & afters frame layouts for staff bios, fun layouts, to generic colors. Use the search bar & dropdown menus to help narrow your search here.

### Helpful filters and templates:

- **Full screen** layout (you can search this in the filter by typing the word - full) so if you have full screen custom designs, they can be uploaded into Kaleidoscope and used on the display. For

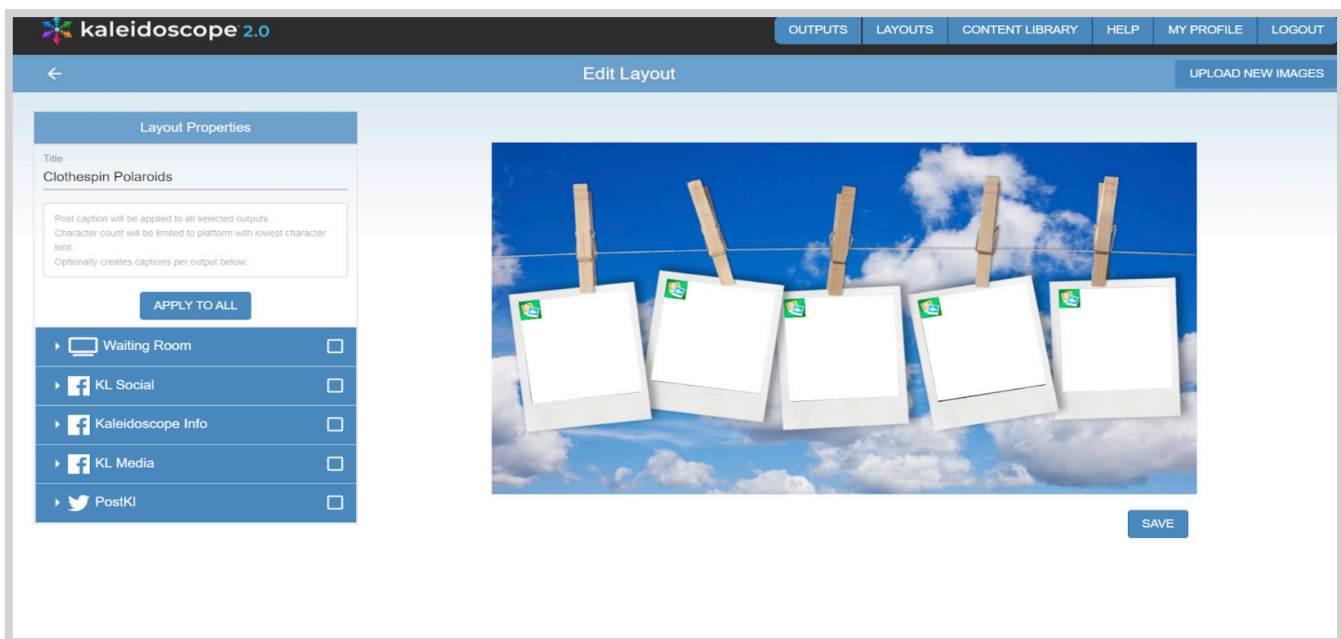
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best quality these should be at least 1920 x 1080.

- **Fun:** Type in the word **fun** and you will see various templates including; chalkboard layouts to welcome new patients, blank ones to write messages, board boards for patient portraits, and other fun layouts to use.
- **Picture Frames:** Type in the word **frame** to see all of our designed frame layouts. These are great to use with team bios or even fun facts and look professional on the display. We have many color options, different orientations and many different numbers of frames.
- **Testimonials:** Filter by **other > testimonials**. We have Google, Yelp, and generic templates. And version with and without photos.

### To add to your Outputs:

1. Go to **Layouts**
2. Click **Blank Layouts**
3. You can search for the Title or Keyword, Group or Category of the layout you want
4. You can click the **PLAY** button at the lower left side of the photo to view it.
5. To add/post the layout on any eligible output, click on the monitor logo with the + on the lower right corner of the photo.
6. It will lead you to the **Edit Layout** page



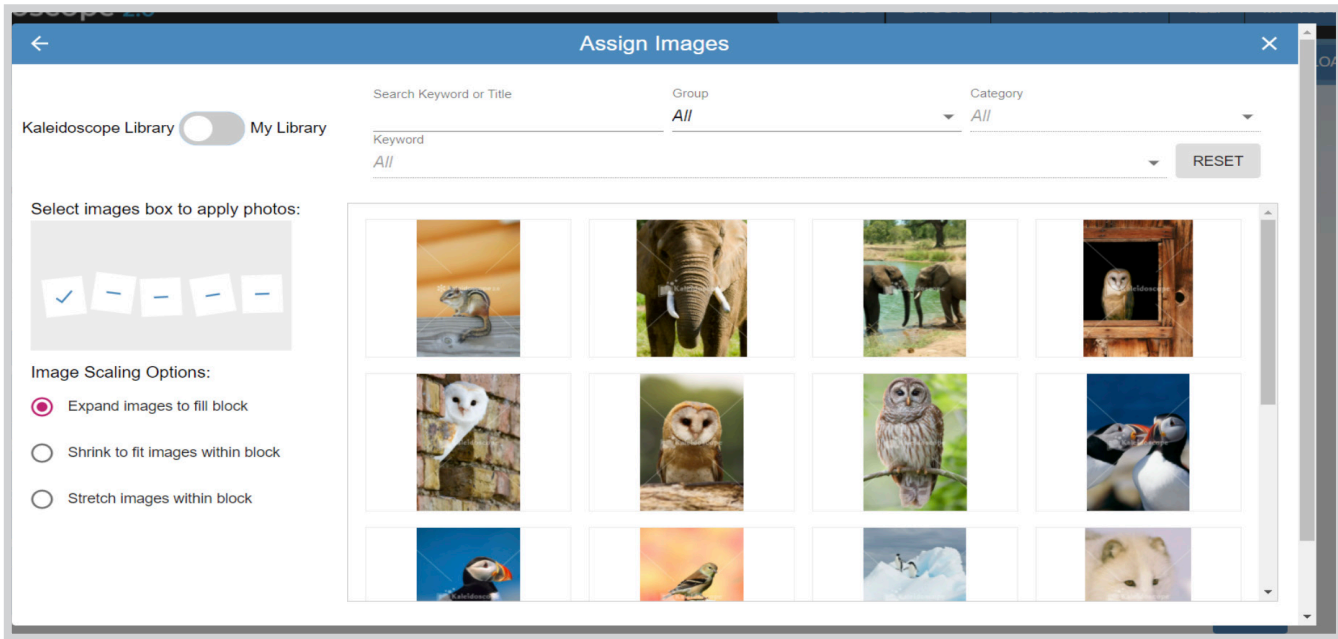
7. Edit the **Title** of the layout so you can easily search for it later
8. **Edit content**
  - Click on whichever box you'd like to change, and you can change / edit.
  - The icons indicate what each box will support (image, text, etc.)

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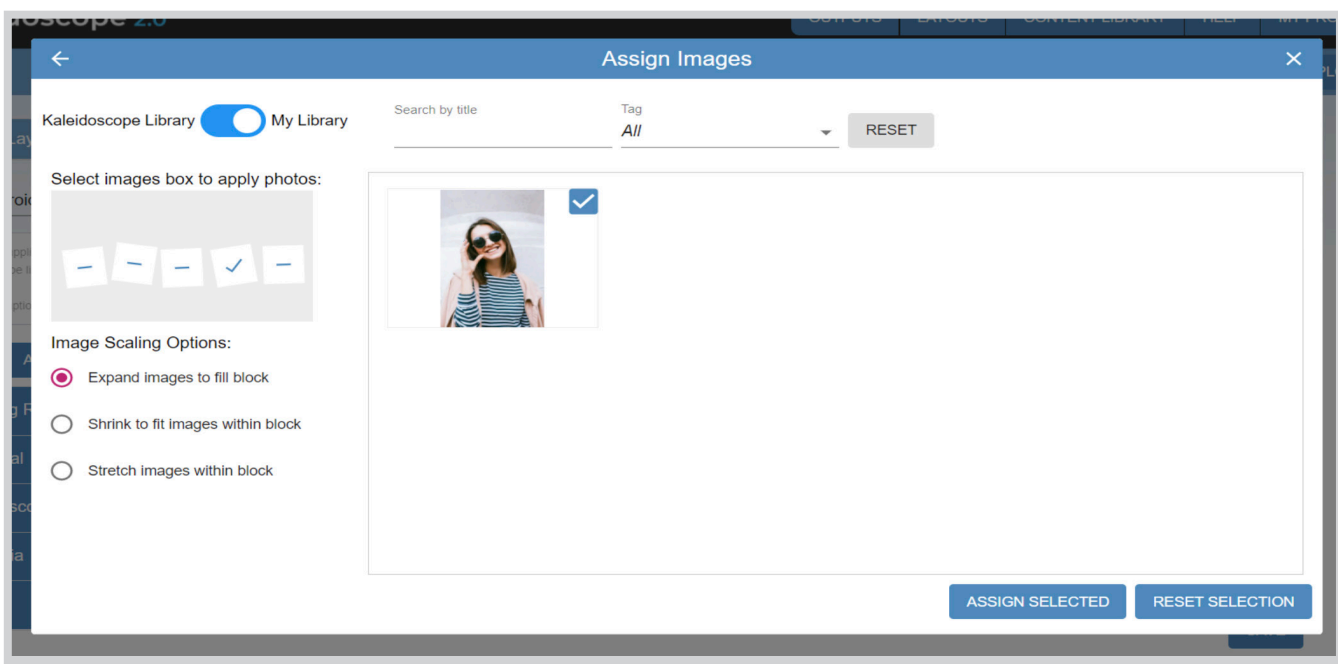


### Example of applying an image(s):

- You can search for the Keyword/Title, Group, Category of the photos you want in our **Kaleidoscope Library** or you can even select from the **My Library** section



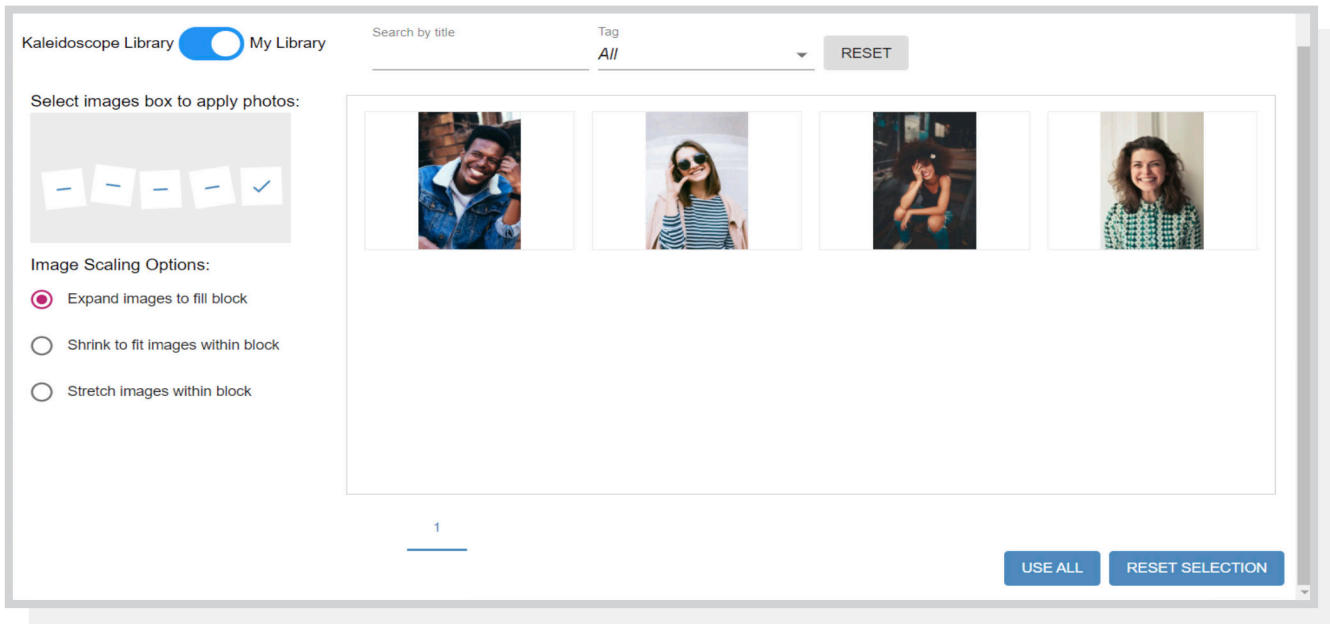
9. After selecting the image you want make sure to click **ASSIGN SELECTED** below.



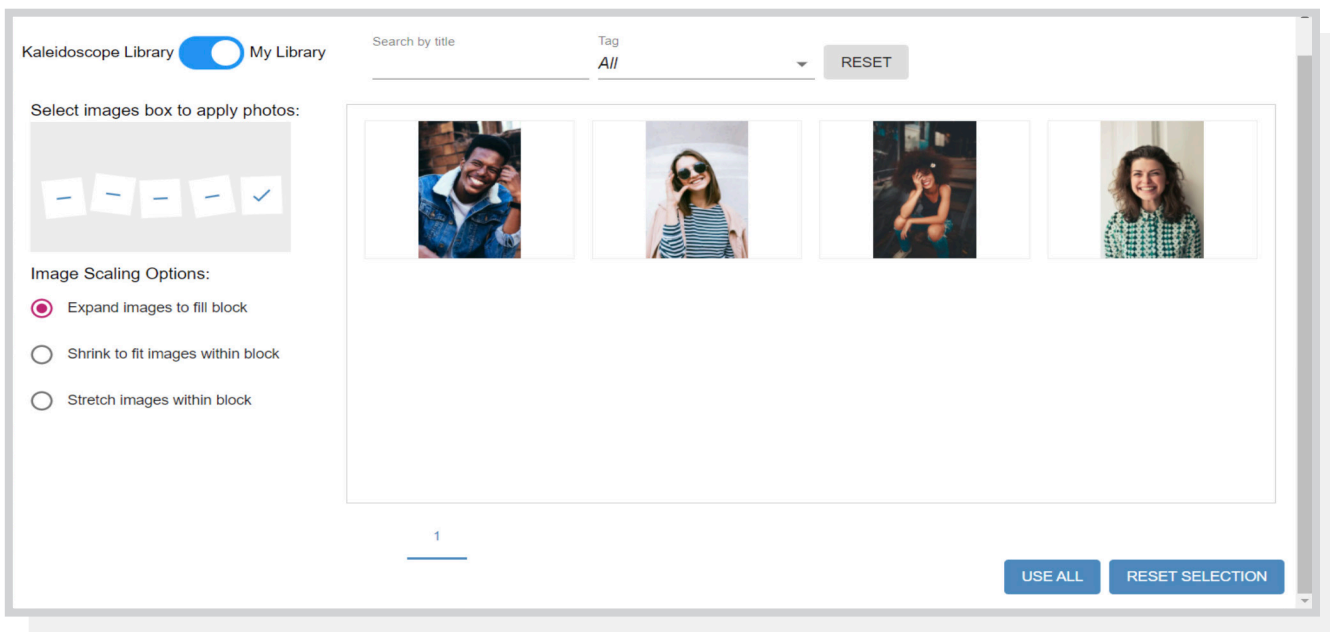
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10. For Digital Signs only, you can also choose to have multiple photos on a single box by clicking **USE ALL**. The photos will scroll at random through the group / category.



11. After filling up all the white boxes click **SAVE**



12. You will then see a notification at the bottom saying **Layout added to output(s)**  
 13. Then click on **OUTPUTS**  
 14. Click the output where you added the layout  
 15. Then you will see that your post has been successfully scheduled and/or has successfully been added to the end of your playlist.

## My Layouts

My Layouts is where you'll find all the layouts you've created. The process for adding these layouts is the same as with Preset Layouts.

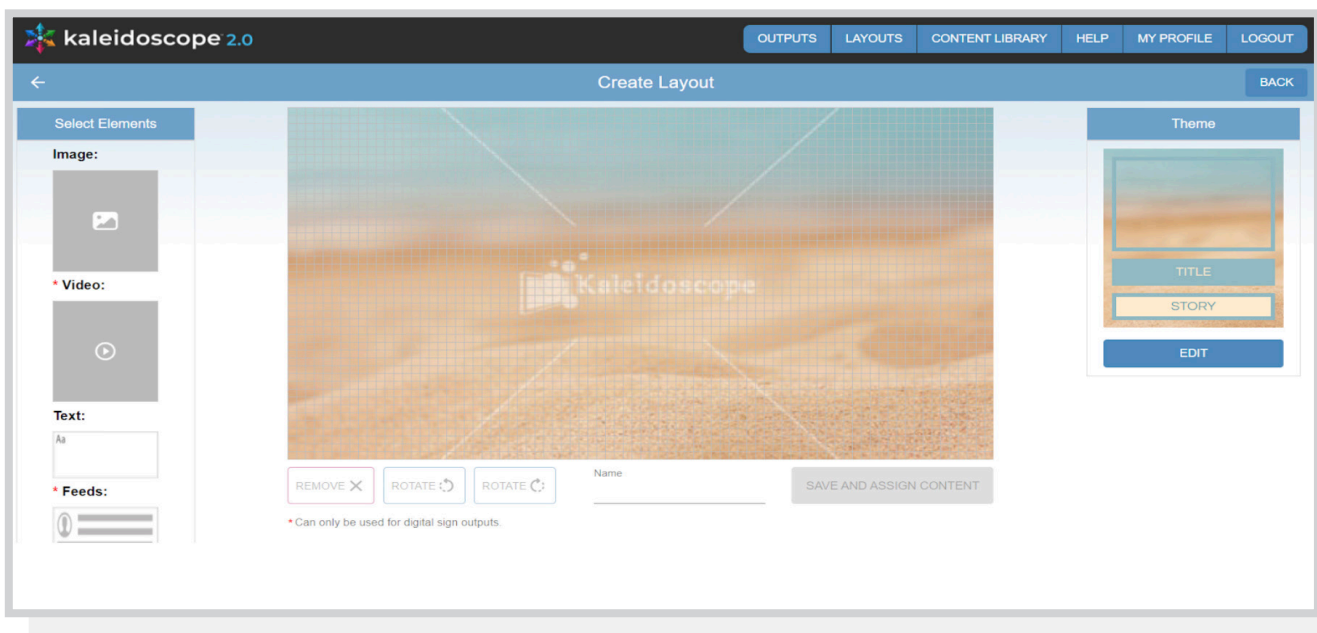
If you delete a layout from your outputs it will still be here to add back. If you delete a layout from My Layout it will be permanently deleted from your account.

## Custom Layouts

Here you can create a layout from scratch by choosing a background and including any elements you'd like. You can also upload your own background

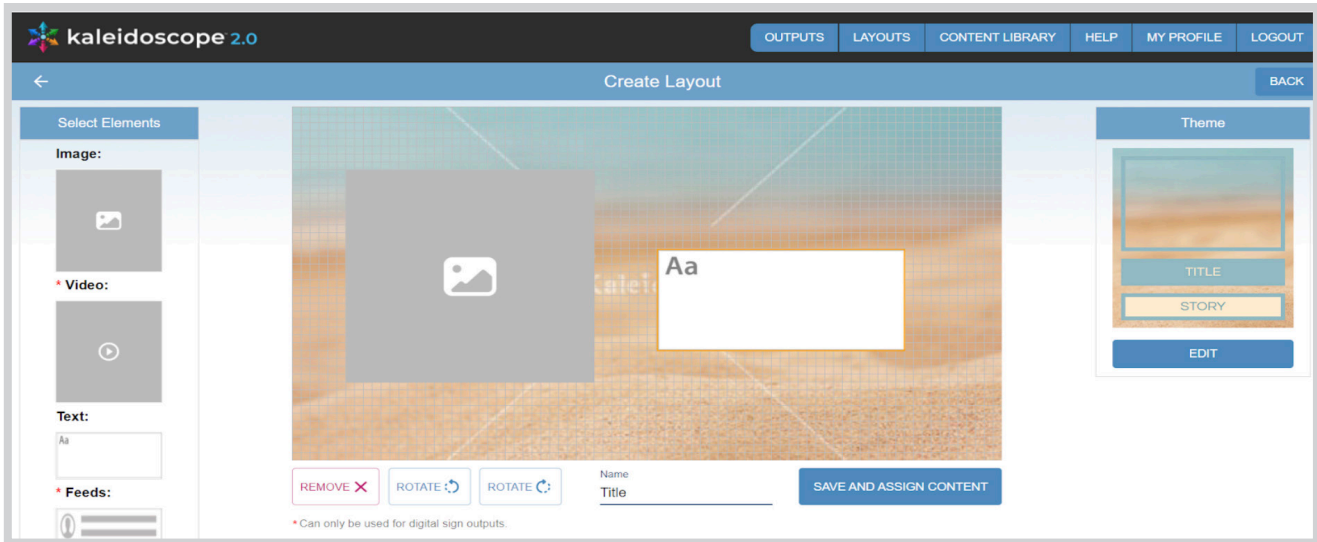
**If you would like to create and add a Custom Layout:**

1. Click the blue **LAYOUTS** tab
2. Click **CUSTOM LAYOUTS**
3. You will be in the **Create Layout** screen
4. Click **EDIT** under **Theme** to choose the background you'd like
  - To use a Kaleidoscope theme, use the dropdown menus or search bar to quickly narrow your search.
  - You can also create a copy of any Kaleidoscope theme make changes by selecting the Kaleidoscope theme and clicking **COPY**
  - Additionally you can create your own theme by clicking on the **ADD NEW THEME**

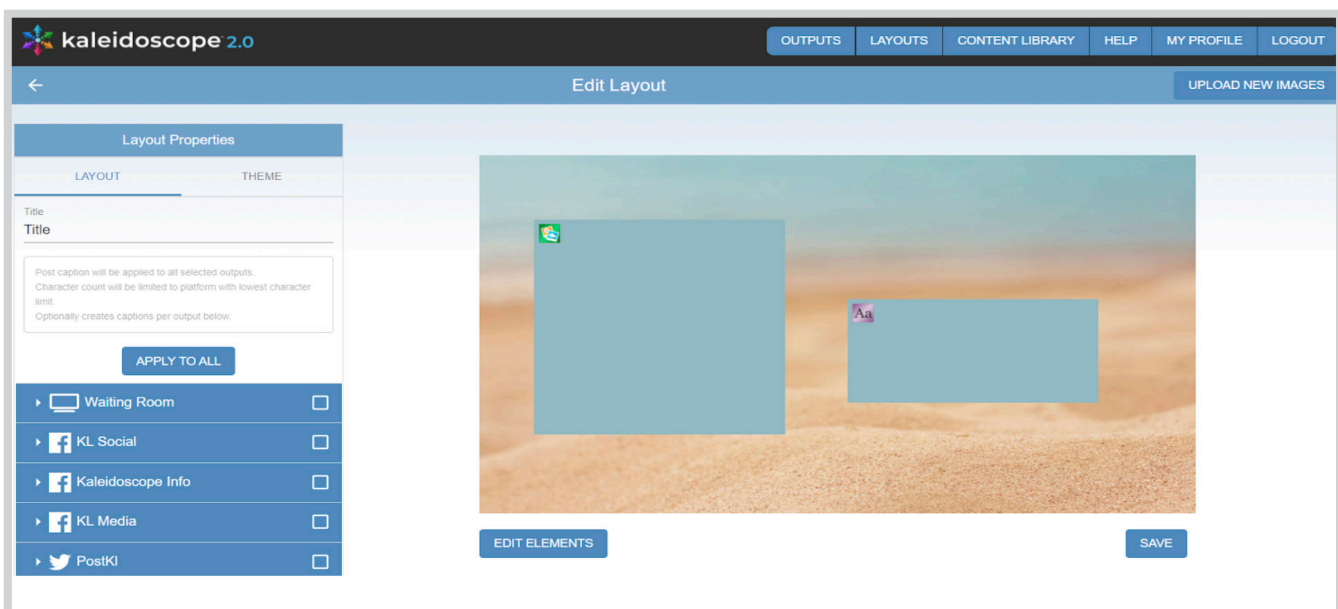


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5. Choose the element(s) you'd like from the left **Select Elements** section
  - The element will show by default in the upper left corner, click on the box and drag to move it where you'd like.
  - Certain elements are only compatible with digital sign outputs and if you choose to add those elements they won't be able to add that layout to a different output.
  - You can resize the boxes by hovering over the edges and dragging to resize



6. **Enter a title** - choose something you can easily find later.
7. Click **SAVE AND ASSIGN CONTENT**
8. It will then connect you to the **EDIT LAYOUT**



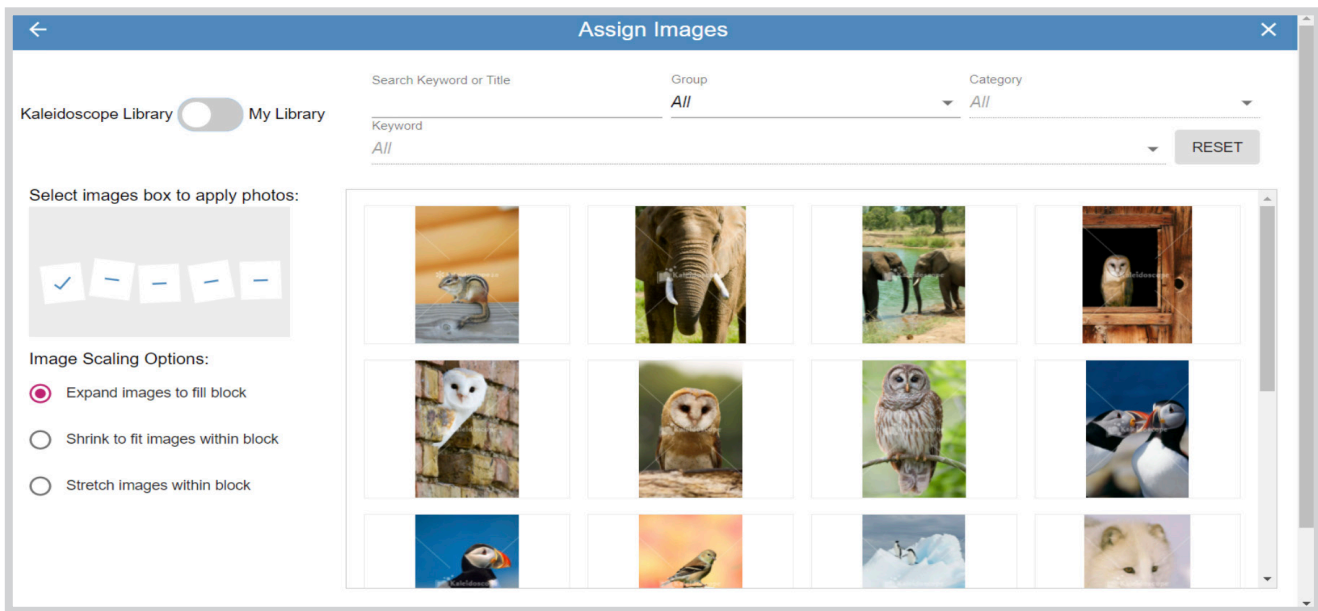
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## 9. Edit content

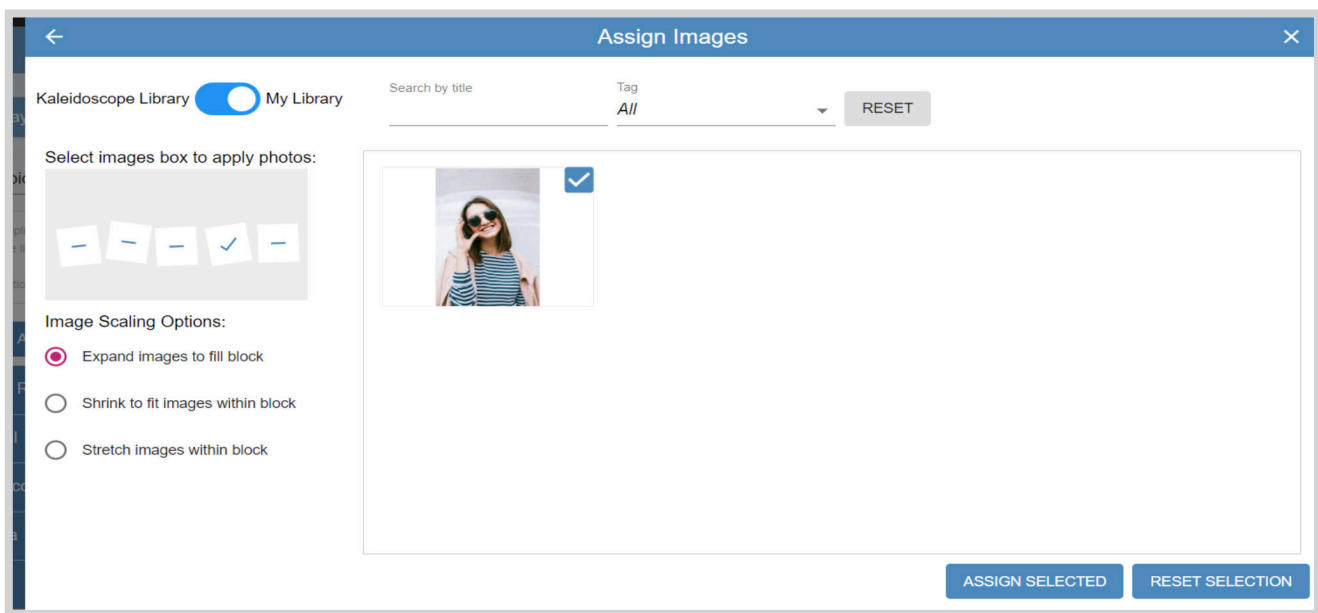
- Click on whichever box you'd like to change, and you can change / edit.
- The icons indicate what each box will support (image, text, etc.)

### Example of applying an image(s):

- You can search for the Keyword/Title, Group, Category of the photos you want in our **Kaleidoscope Library** or you can even select from the **My Library** section.

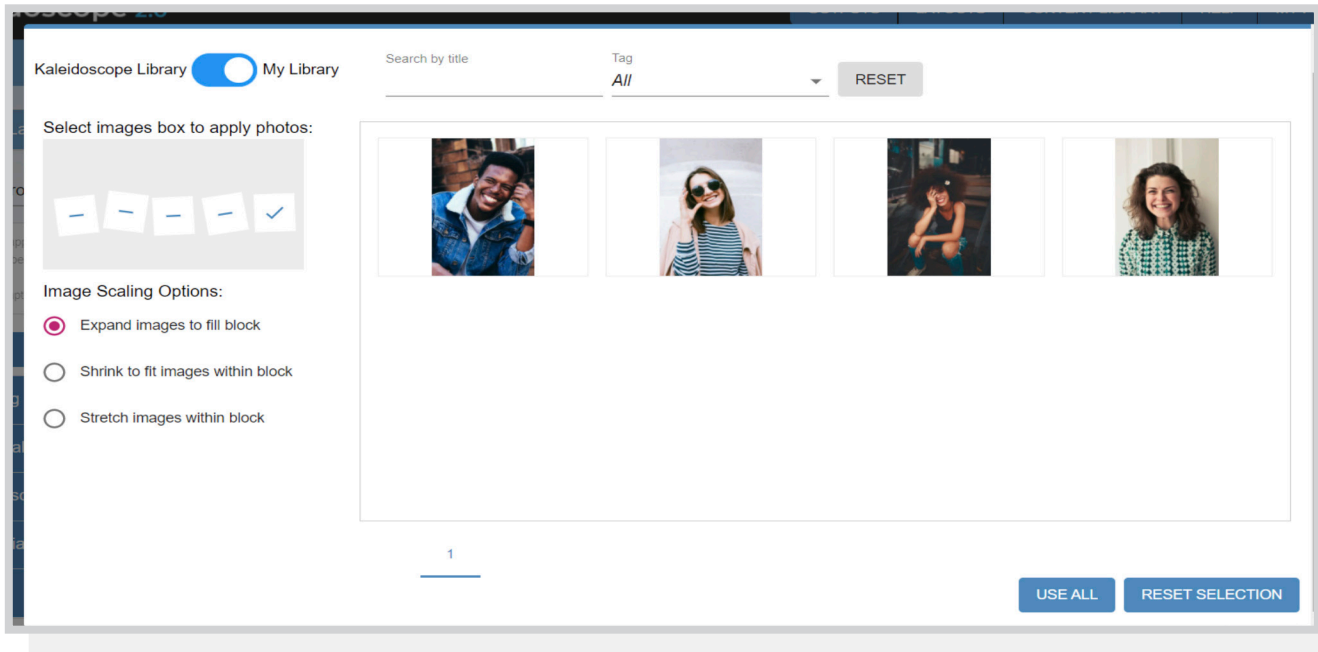


10. After selecting the image you want make sure to click **ASSIGN SELECTED** below.



*Continued on next page >*

11. For Digital Signs only, you can also choose to have multiple photos on a single box by clicking **USE ALL**. The photos will scroll at random through the group / category.



12. Check the output(s) where you want to publish the layout.

**13. Scheduling:**

- **For post outputs:** Choose a date and time to schedule the post
- **For playlist outputs:** You can add a date range if this is something you'd like to schedule or leave dates off and it will display all the time.

14. After setting up the scheduling click **ADD SELECTED TO OUTPUT**

15. You will see a notification on your lower left corner of the screen Layout added to Output(s)

**For Playlist Outputs**

The layout will be added to the end of your sequence. You can click in to the output and click **EDIT LAYOUT ORDER** to move the layout either via drag and drop or entering the desired position number.