

Conexo Casa

Quickstart Guide for Buddies — setting up a new client, start to finish

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This guide is for you, the **buddy** — a family member, friend, or professional caregiver setting up Conexo Casa for someone you support. It takes about 20 minutes and you only do it once per client. For every feature in more depth, see the companion *Conexo Casa Buddy Manual*.

Before you start

- Your own email address, for your own buddy account.
- An email address for your client. If they already use email themselves, that's fine. If not, use an address you can check on their behalf — Conexo Casa sends a confirmation link to it during sign-up.
- About 20 minutes together, ideally sitting beside them so they see the app being set up on their own device.

Two accounts, always

Conexo Casa always uses **two separate accounts**: one for the person you're supporting (their **client** account) and one for you (your **buddy** account). You'll use your own buddy account for every client you support, not just this one.

The setup, step by step

1

Create your own account

Go to **app.conexo.casa** on your own device, tap **Sign Up**, and enter your real name, email, and a password — the same form your client will use in the next step. This is your account, reused for every client you support. You don't pick a “buddy” role here; the app grants it automatically once you finish linking to a client in Step 3.

2

Create your client's account

On your client's device — or on your own device after signing out first, or in a private/incognito browser window (a regular second tab shares your sign-in, so it won't work) — tap **Sign Up** again and create a second, separate account: their name, the email address from the checklist above, and a simple password you can share with them out loud.

Check that inbox before moving on

Conexo Casa emails a confirmation link to the address you just used. Open that inbox and click the link — the account can't sign in until you do. If you used your own email for your client's account, this confirmation email will land in your inbox, not theirs.

3

Link your two accounts

This is the step that actually connects you to your client — don't skip it or do it out of order. On the **client's** account, go to **Profile** → **Settings** → **Authorize a Buddy** and enter *your* email address, then tap **Authorize**. Then, on **your own** account, go to **Profile** → **Settings** → **My Client Connections** and enter *your client's* email address, then tap **Add Client**. Because they already authorized you, you're connected immediately and they'll appear in your **Buddy Dashboard**.

Not the same as “Add Buddy”

Profile → Settings also has a card called **My Buddy Network** with an **Add Buddy** button. That's a personal contact list only — a name, phone number and note — and it does **not** give anyone access to manage the account. Use **Authorize a Buddy** / **My Client Connections** for real access, described above.

If your Buddy Dashboard doesn't show up right away

Refresh the page or sign out and back in after tapping Add Client — buddy access is granted immediately, but the app may not notice until it re-checks your account.

4

Turn on notifications on your own device

Still on your own account: **Profile** → **Settings** → **Push Notifications** → **Enable**. This is what lets an emergency alert reach your phone the moment your client presses the help button.

On an iPhone or iPad

Safari only delivers push notifications to a Conexo Casa icon that's been **added to your home screen**. Open app.conexo.casa in Safari, tap the Share icon, choose **Add to Home Screen**, then open Conexo Casa from that new icon and enable notifications from there. Enabling it from a regular Safari tab will not work on iOS.

5 Tell Bud-ee about your client

This is one of the most impactful things you'll do. Bud-ee is **On** for a new client by default. Go to **Buddy Dashboard** → **My Users**, find your client's card, and open **Notes for Bud-ee**.

Write a few real details: a pet's name, who visits and when, what they did for work, topics to avoid. This is what makes Bud-ee's conversation feel like it knows them, instead of guessing.

If more than one buddy will do this

The notes box always opens empty, even if notes were saved before — it does not load what's already there. Saving replaces the previous notes entirely. If you're not the only buddy, check with the others (or ask support) before you save, so you don't erase what someone else already wrote.

6 Choose their home screen

In **Buddy Dashboard** → **My Users**, find your client's card and open **Configure Home Screen**. The starting four are **Bud-ee, Call, Calendar, and Support** — leave it there at first. Add more tiles only once they're comfortable; fewer tiles is almost always the right call.

7 Set up email and calendar (optional)

If your client wants to use email, or you want their calendar to show up in the app, this needs one more short pass, signed in as your client. It's covered in full in **Chapters 6–7** of the Buddy Manual. You can skip this for now and come back to it — Contacts, unlike these two, needs no setup at all.

8 Test it together

Before you consider the setup done, test it live: have your client tap the **Call** tile and call you, right there in the room if you can. Watch it connect, then watch it hang up cleanly and return to their home screen. Then, while you're the only linked buddy and it's easy to tell what's real, have them tap the **Emergency** button once (approve the location permission prompt if asked) — confirm your own phone buzzes, then **Acknowledge** and **Mark Resolved** from your Buddy Dashboard within a few minutes. If both work, the setup is complete.

You're set. What's next?

Everything else — the calendar, Bud-ee's memories, alerts, the home screen — can be managed from your own Buddy Dashboard, any time, from anywhere. A few places to go from here:

- **The Conexo Casa Buddy Manual** — every feature covered in full, including remote management, groceries and rides, smart home, and location sharing.
- **Help & Training**, inside the app — tap the **User Guides** tile any time for a shorter, in-app version of this material.
- **Get Support**, inside the app, or call/email support directly (see below) — for anything this guide doesn't answer.

Getting help

Support: (602) 845-9411 · support@conexo.casa

Monday–Friday 8:00 AM–6:00 PM MST, Saturday 10:00 AM–4:00 PM MST

For anything urgent with your client right now, use the red **Emergency** button on their home screen instead — it notifies every linked buddy immediately, and re-notifies again roughly every 5 minutes if nobody has acknowledged it.