

Quick Start - The Basics

Get to know WorkDo!

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The Basics

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- [Main functions](#)

● The Workplace

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 - [Join workplace - after sign up](#)
 - [Join another existing workplace](#)
 - [Invite - with company email](#)
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● The Groups

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- [Add members to sub-groups](#)
- [Join a sub-group](#)
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● Let's start to...

- [Create items](#)
- [View posted items](#)
- [Edit, discard, delete and more](#)
- [Use My Shelf](#)



WorkDo simplifies how you manage information

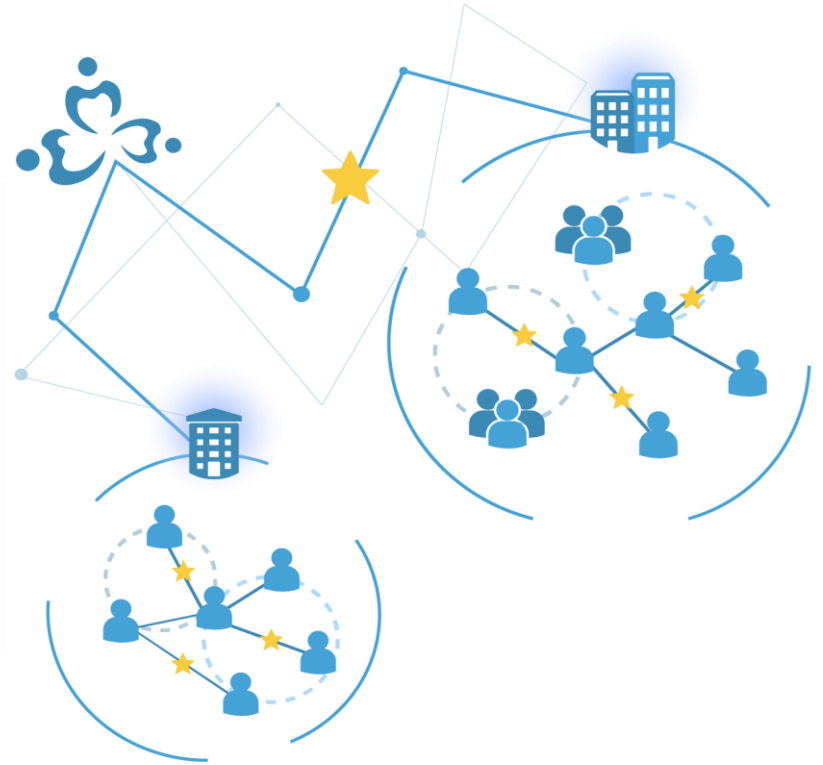
Different levels of management
Must be a member to view, use
and manage information

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Manage information

- Participating after joining
- Manage multiple workplaces
- Sub-groups in each workplace
- 1-on-1 teamwork: buddies
- My Shelf





WorkDo basic tools

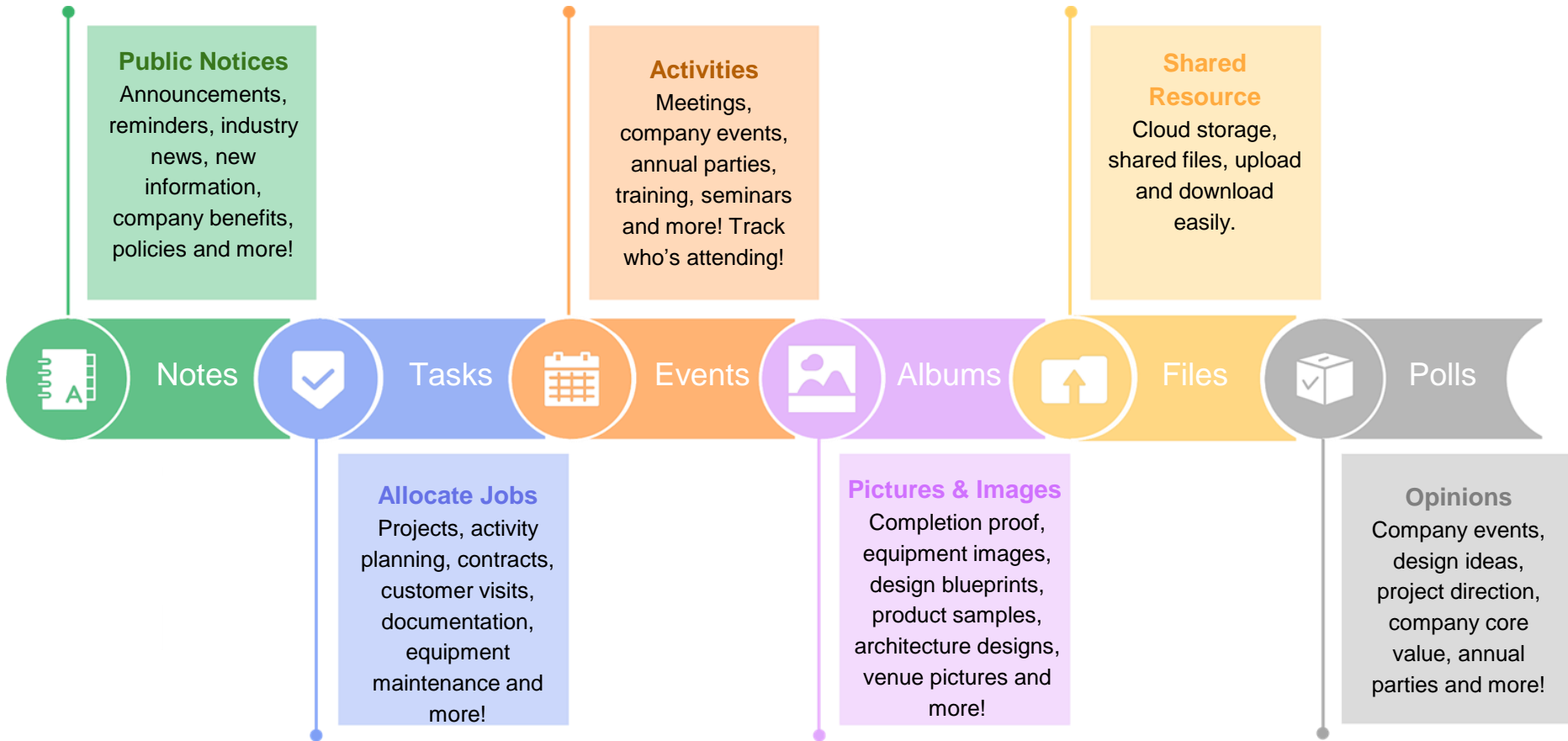
For workplace/groups/buddies/My
Shelf

Tools you can use to enhance
teamwork every day

[回到目錄](#)

Basic tools

Basic Tools	Workplace	Group	Buddy	My Shelf
Notes	•	•	•	•
Tasks	•	•	•	•
Events	•	•	•	•
Polls	•	•	•	
Files	•	•	•	
Albums	•	•	•	•
Wall	•	•	•	
Chats	•	•	•	



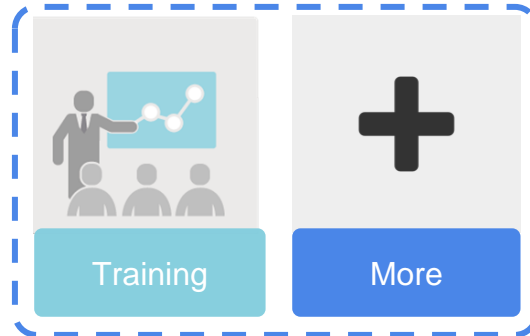
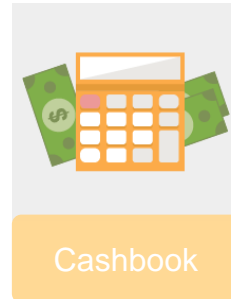
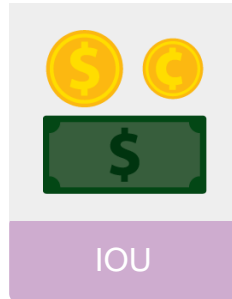
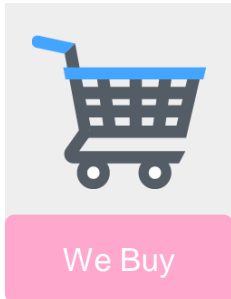
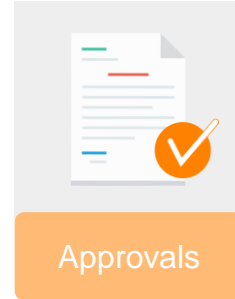
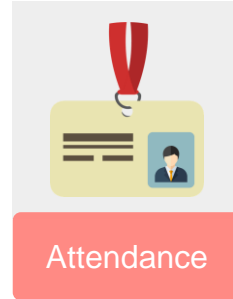
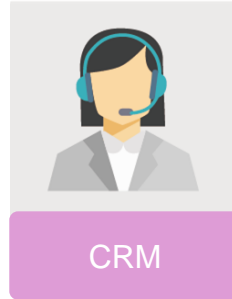
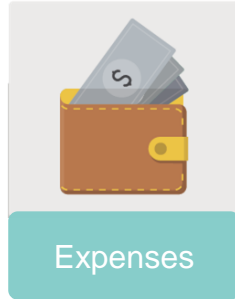
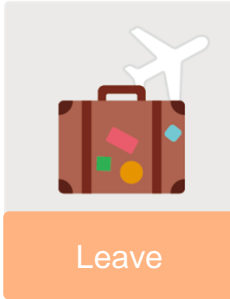


Best thing about WorkDo is...

It is an all-in-one software with many tools to use within your workplace, groups and between buddies to enhance teamwork!

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The Tools



More to come...



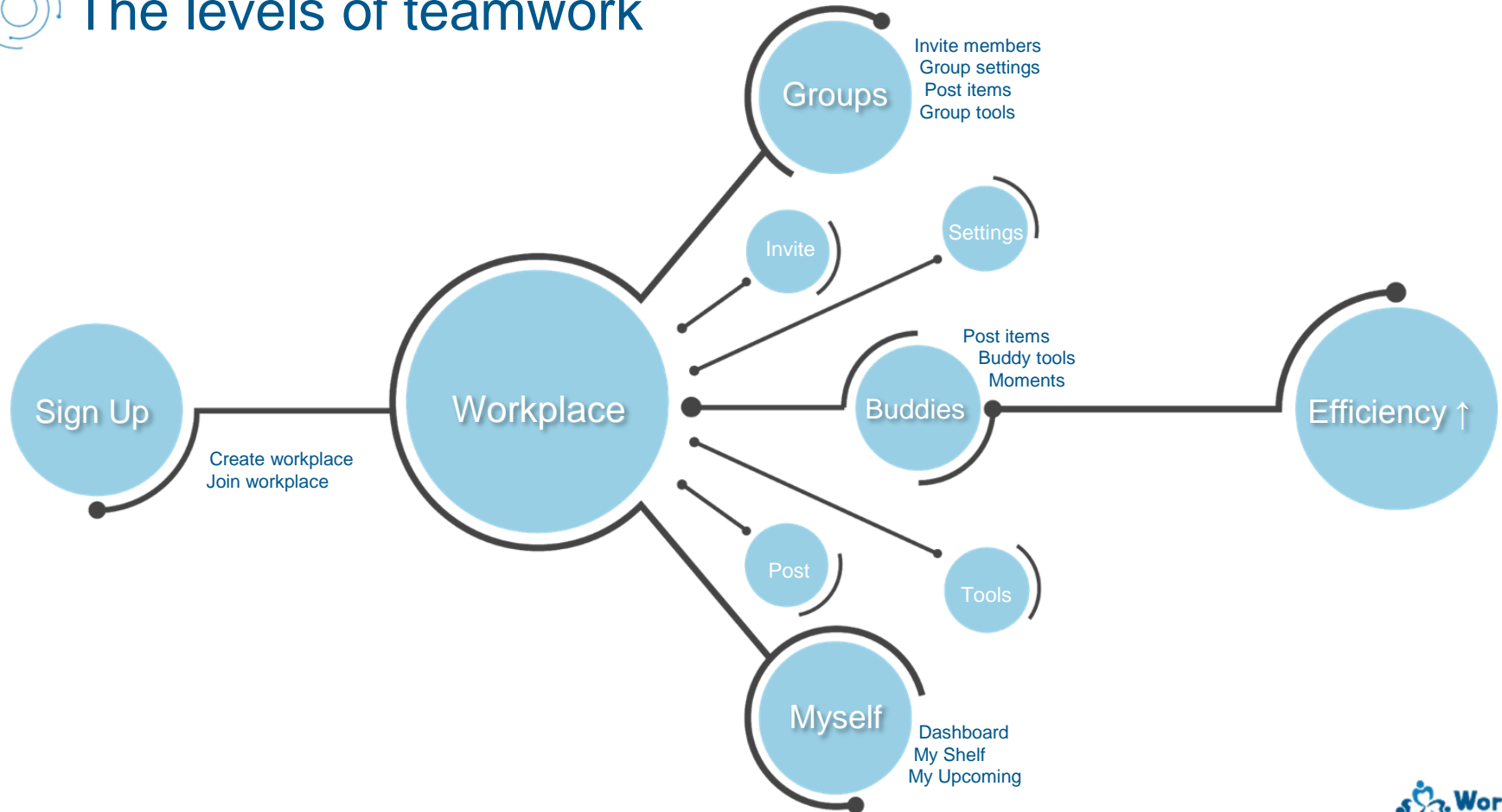
Of course, WorkDo not only has basic tools...


Check out other [WorkDo Features](#)

to see all the different ways to
increase work efficiency

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The levels of teamwork





With great power comes steeper learning curve?

Nope, not here, it's actually very simple to use!

With just a few steps you can achieve a lot with WorkDo!

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Smarter tools for the whole company

Saves costs

Saves time

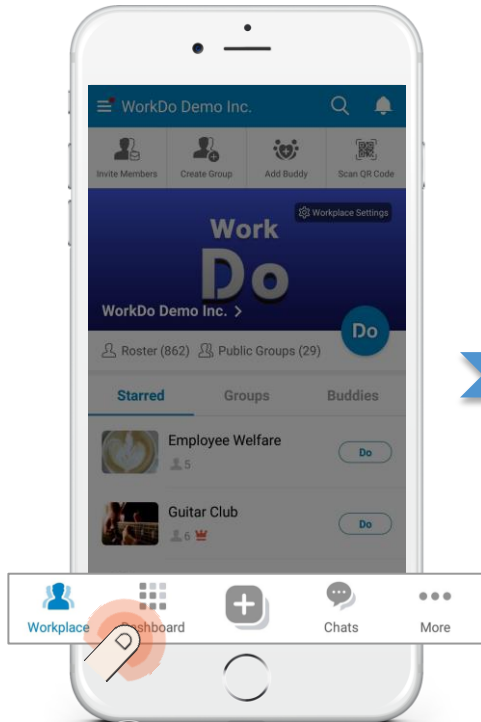
Work easy, work smart!

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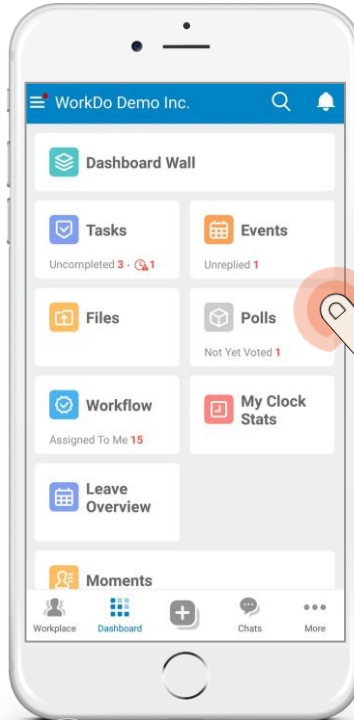
Workplace: start from here



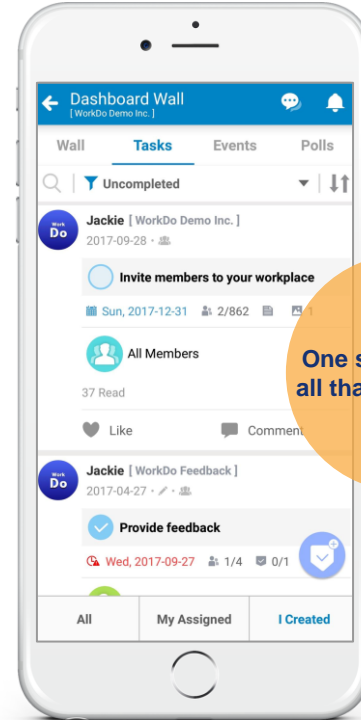
Dashboard: everything across groups and buddies



01 Dashboard



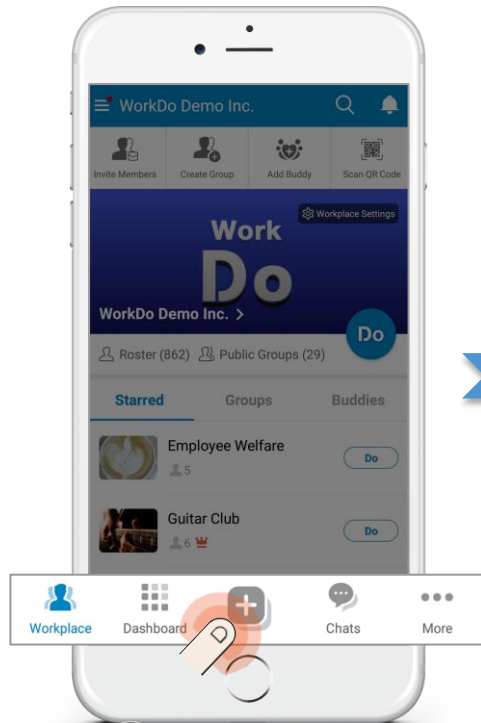
02 Your items



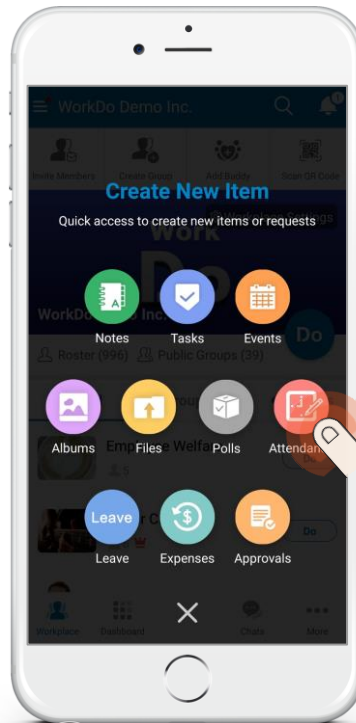
03 Check quickly

One stop shop for
all that needs to be
done

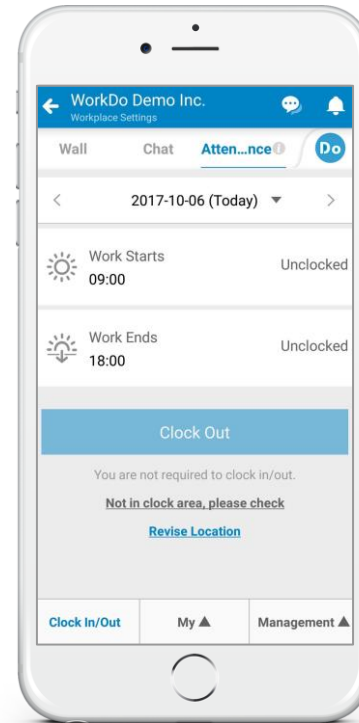
+: quick access to create new items and requests



01 +

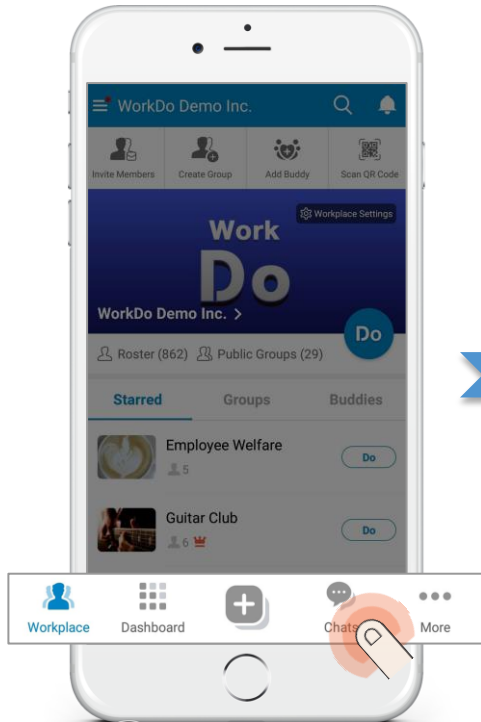


02 Choose tool

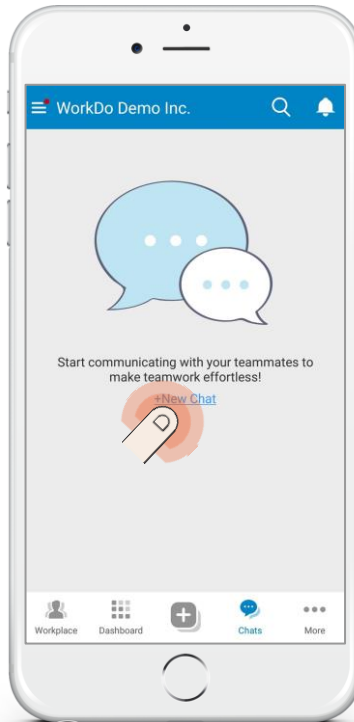


03 Enter create page

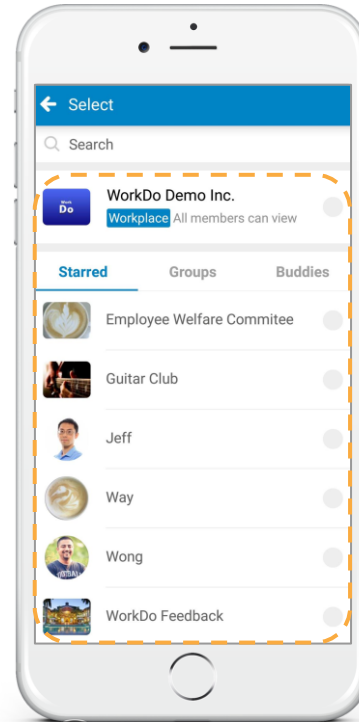
Chats: instant messaging



01 Chats



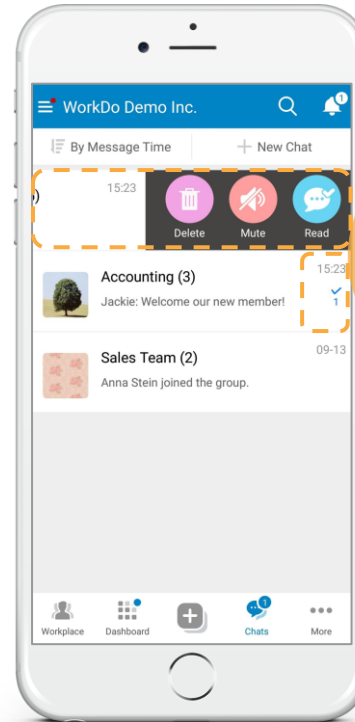
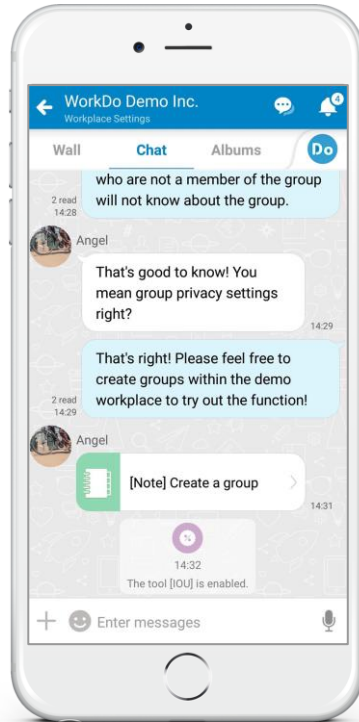
02 + New Chat



03 Choose where to chat



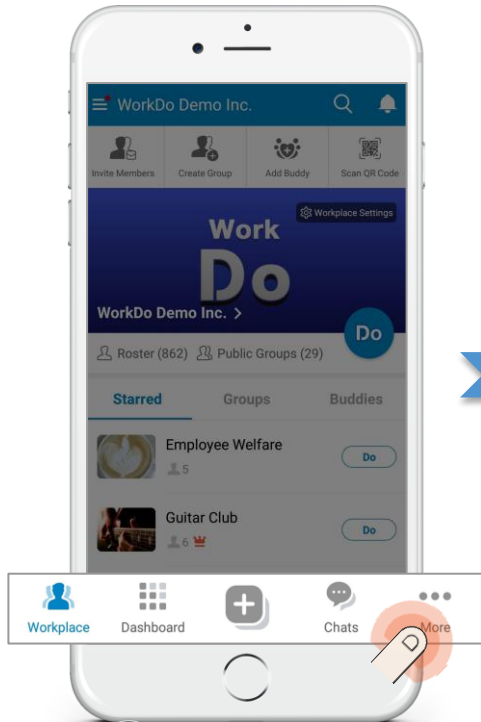
Chats: instant messaging



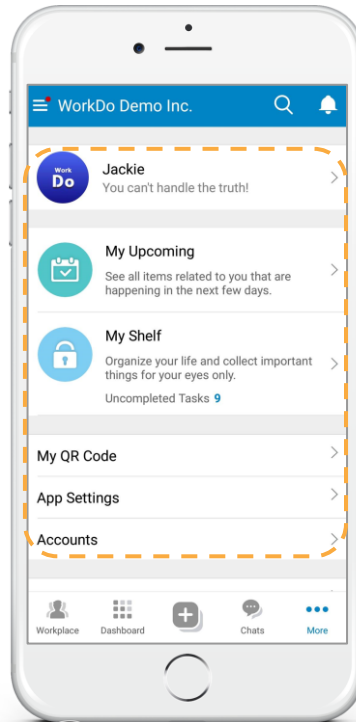
04 Includes notifications

05 Secret menus

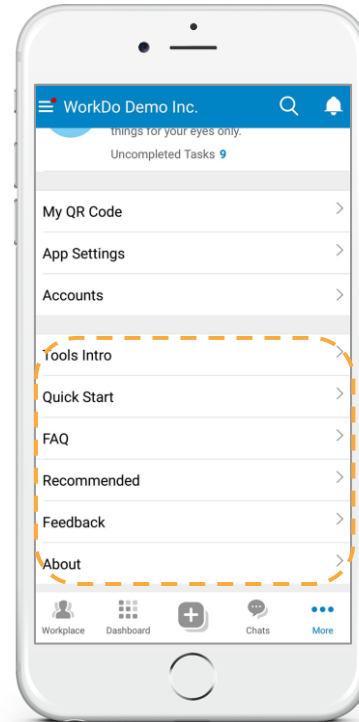
More: personal stuff and app guide



01 More



02 Personalize



03 App guide



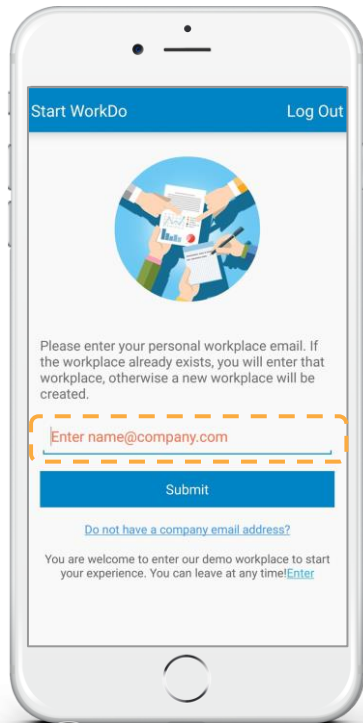
Create workplace with company email

Use company email as a security measure

Limit access to company employees only

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Create workplace: use company email



Start WorkDo Log Out

Please enter your personal workplace email. If the workplace already exists, you will enter that workplace, otherwise a new workplace will be created.

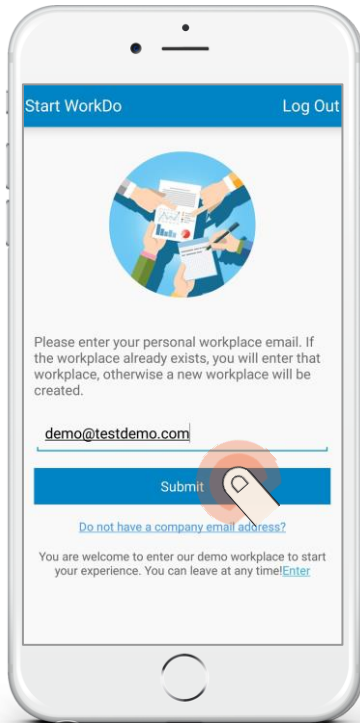
Enter name@company.com

Submit

[Do not have a company email address?](#)

You are welcome to enter our demo workplace to start your experience. You can leave at any time! [Enter](#)

01 Enter company email



Start WorkDo Log Out

Please enter your personal workplace email. If the workplace already exists, you will enter that workplace, otherwise a new workplace will be created.

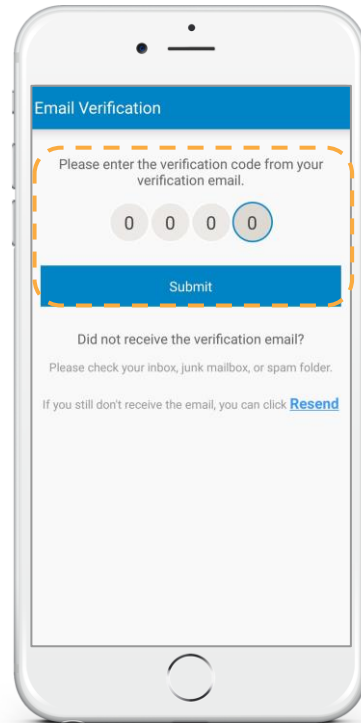
demo@testdemo.com

Submit

[Do not have a company email address?](#)

You are welcome to enter our demo workplace to start your experience. You can leave at any time! [Enter](#)

02 Submit



Email Verification

Please enter the verification code from your verification email.

0 0 0 0

Submit

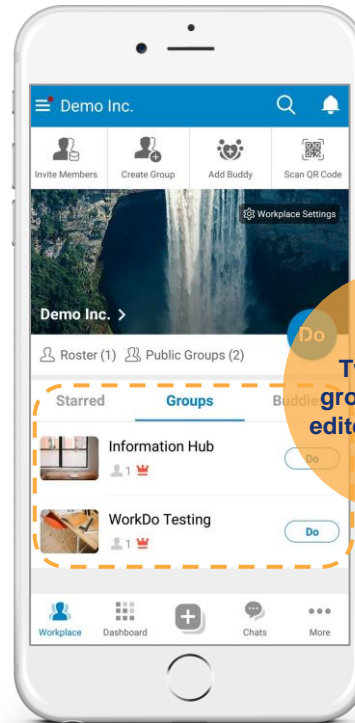
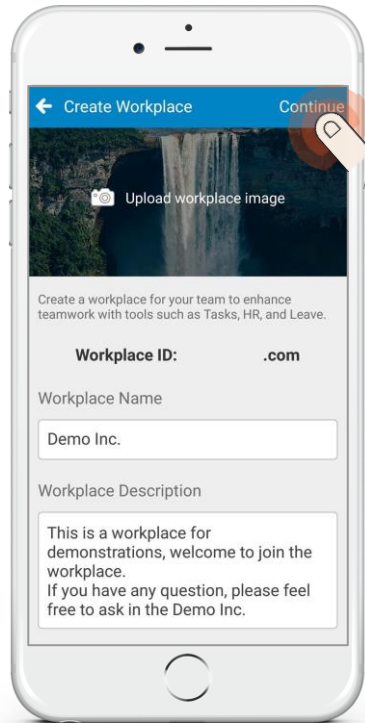
Did not receive the verification email?

Please check your inbox, junk mailbox, or spam folder.

If you still don't receive the email, you can click [Resend](#)

03 Verification code

Create workplace: use company email



Two default groups, can be edited or deleted

04 Fill out info > Next

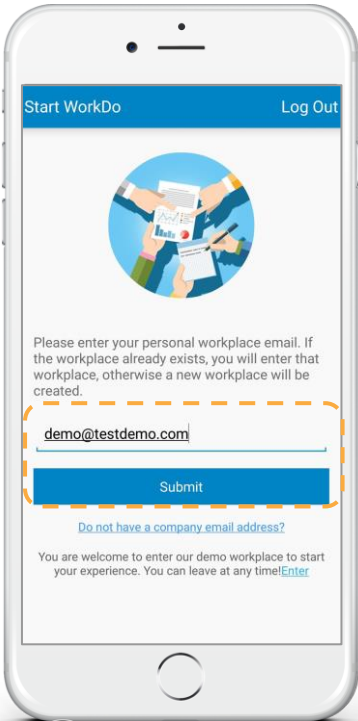
05 Enter your workplace



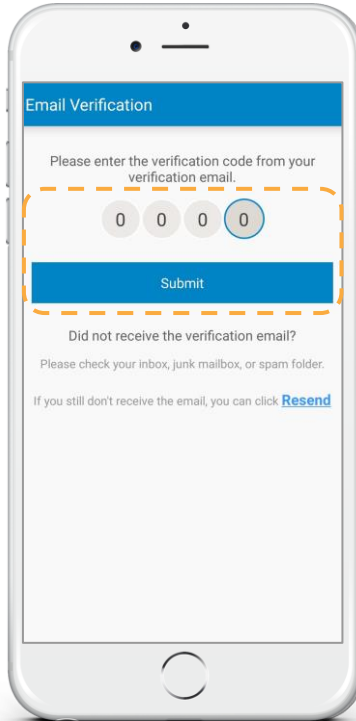
Join workplace

1. Workplace uses company email
2. I have personal company email
3. Join after sign up to start teamwork

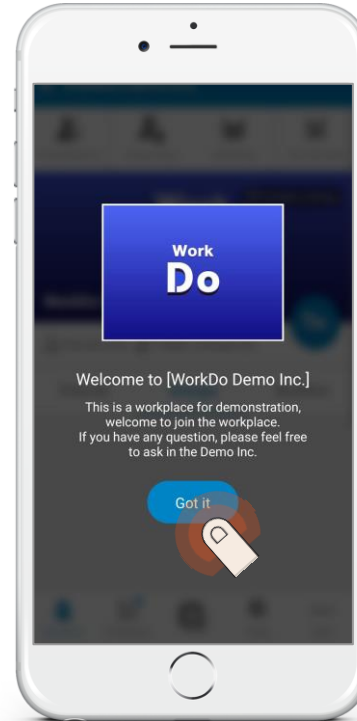
Join workplace (right after sign up)



01 Enter company email



02 Enter verification code



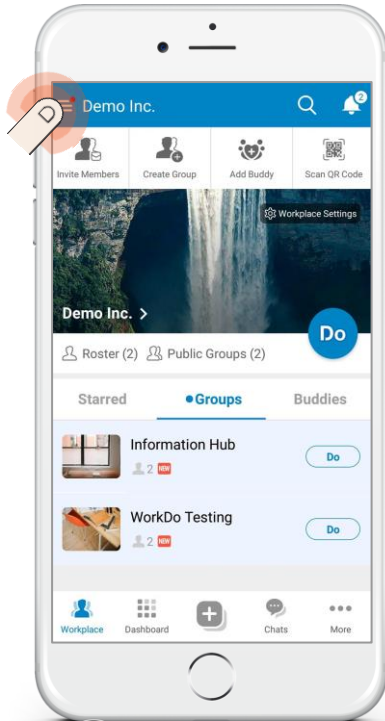
03 Welcome message



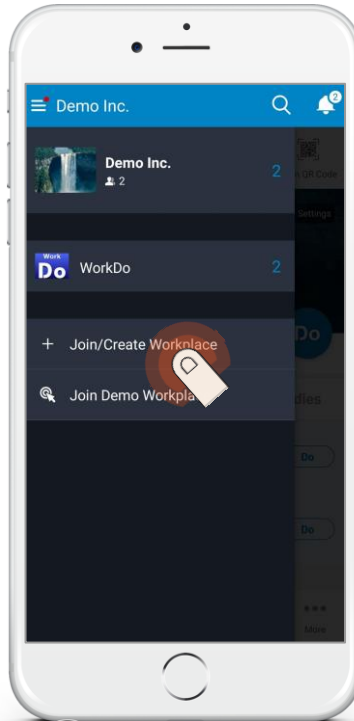
Join workplace

1. Join another workplace
2. Workplace uses company email
3. I have personal company email

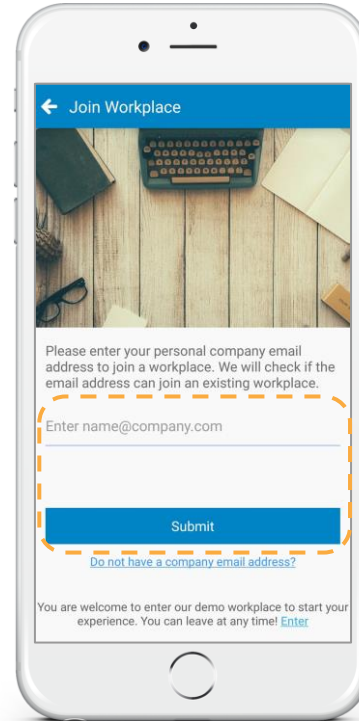
Join workplace (workplace that uses company email)



01 Workplace list



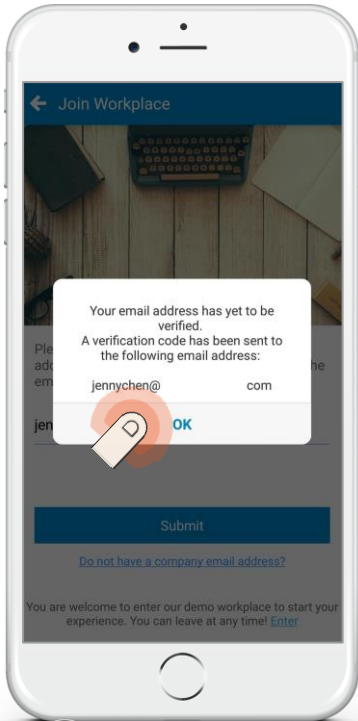
02 Join/Create Workplace



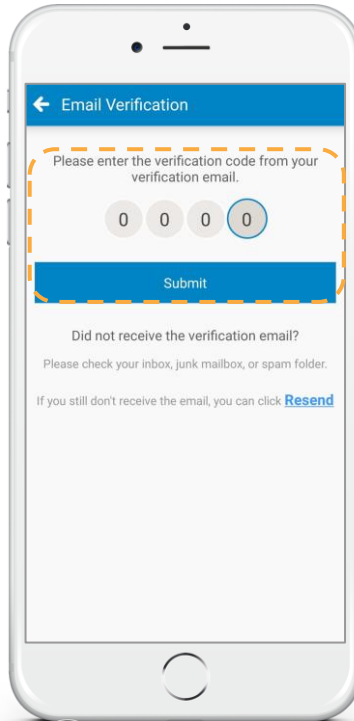
03 Enter company email



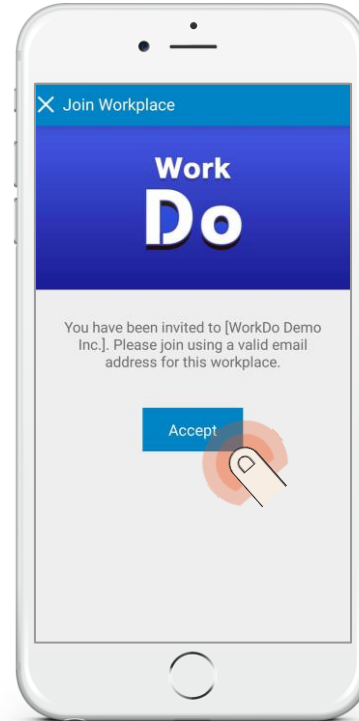
Join workplace (workplace that uses company email)



04 Check verification email



05 Enter verification code



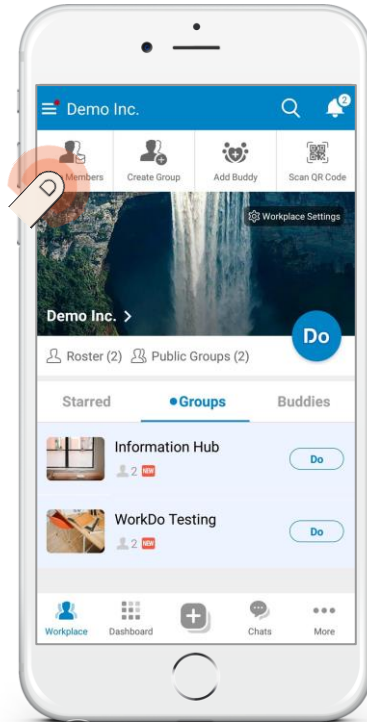
06 Click Accept



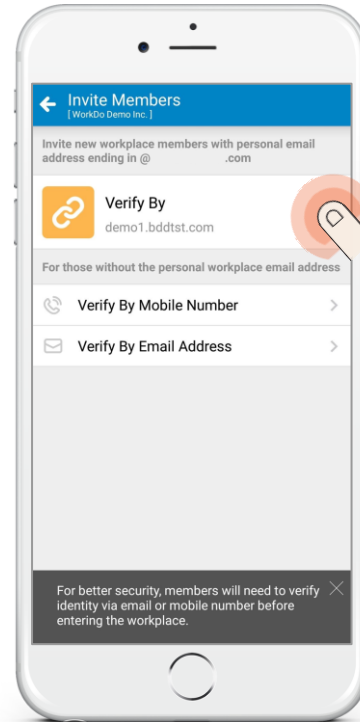
Invite coworkers to join

1. Coworker has company email
2. Send invite

Invite coworkers to join workplace (have company email)

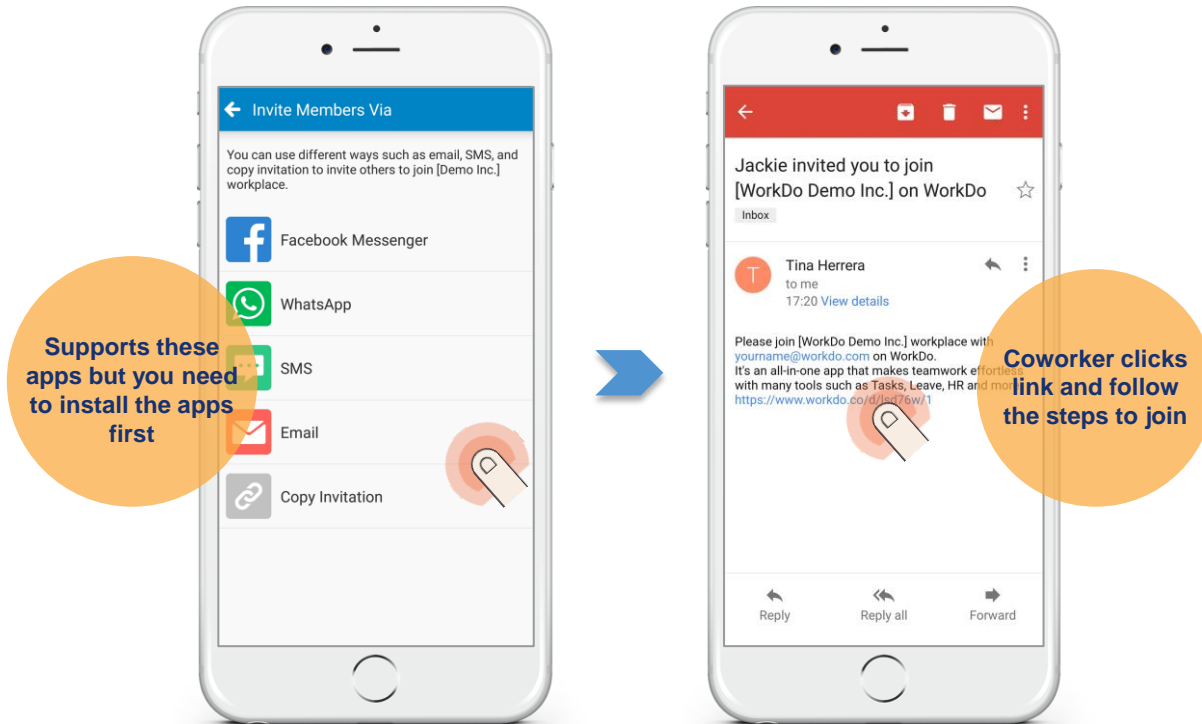


01 Invite Members



02 Verify By

Invite coworkers to join workplace (have company email)



04 Choose an invite method

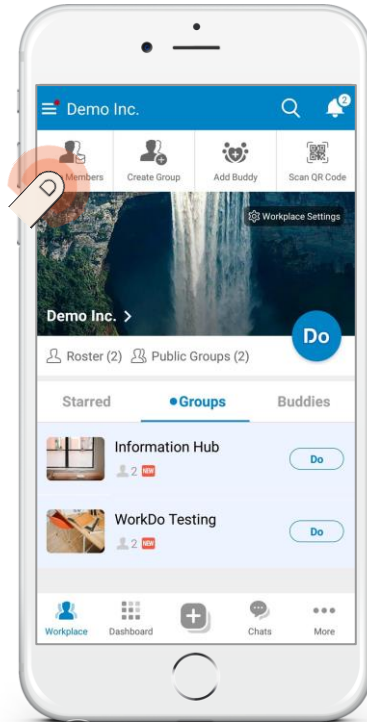
05 Coworker clicks link



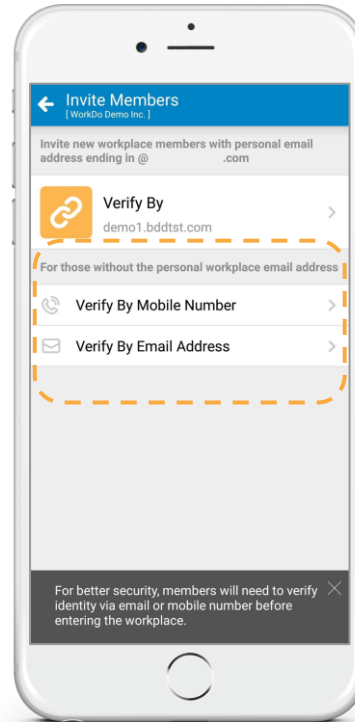
Invite coworkers to join workplace

1. Coworker does not have company email
2. Create invitation specifically for coworker's email or mobile number

Invite coworkers to join workplace (no company email)

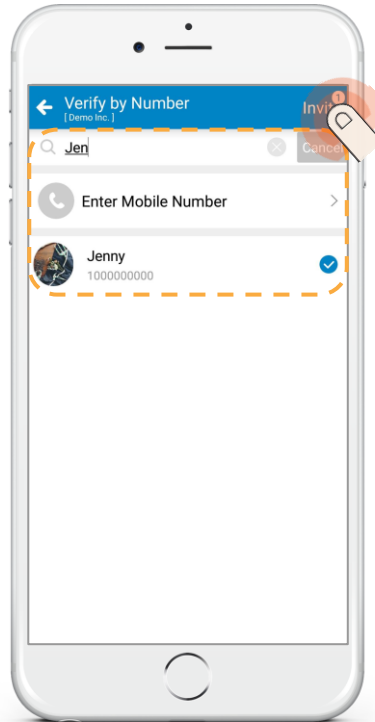


01 Invite Members

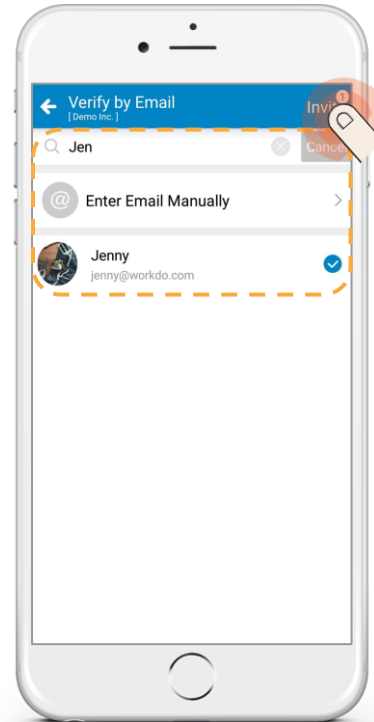


02 Create invite with

Invite coworkers to join workplace (no company email)



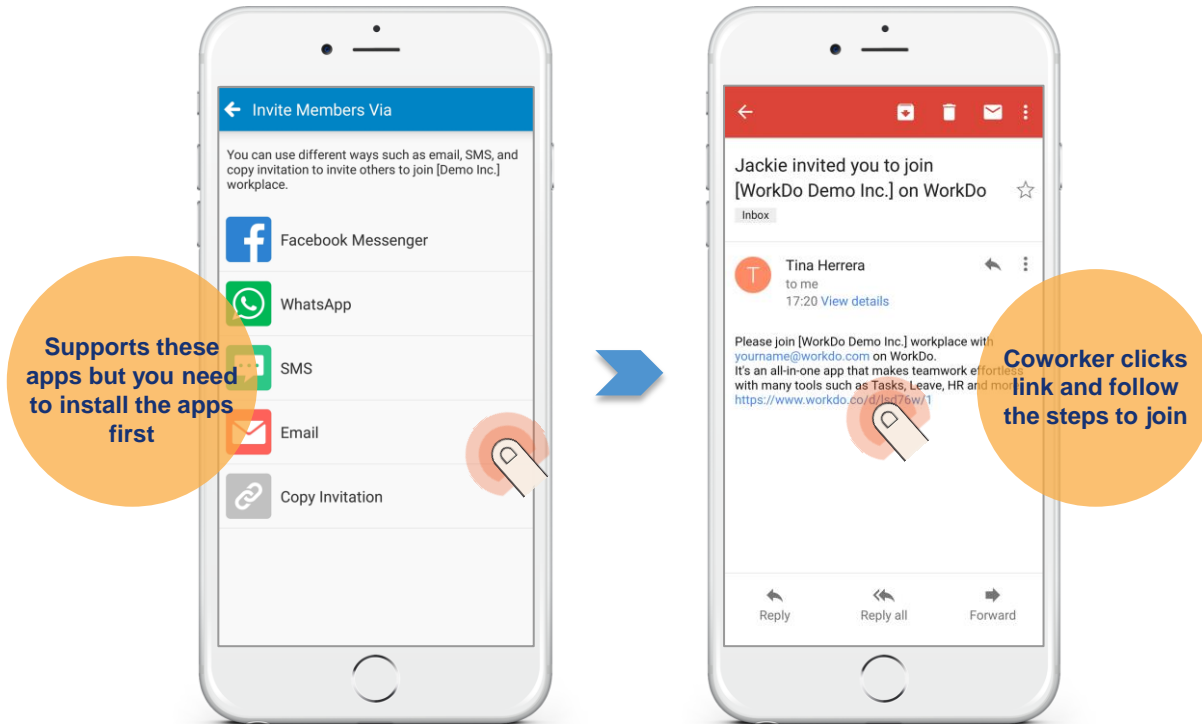
OR



03a Verify By Mobile Number

03b Verify By Email Address

Invite coworkers to join workplace (no company email)



04 Choose a method

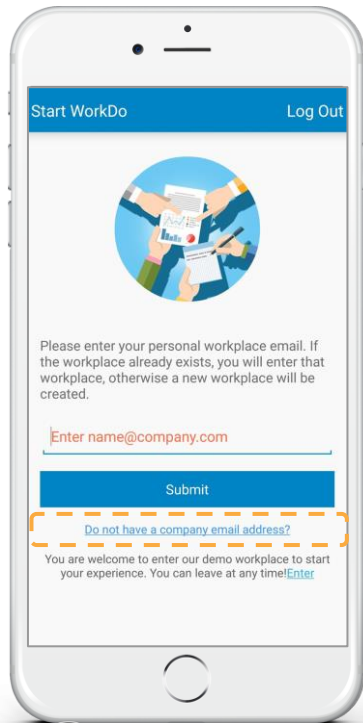
05 Coworker clicks link




Create workplace with free email

1. Fill out all required info
2. Target invite future members
3. Members still required to verify to join

Create workplace: with free email



Start WorkDo Log Out



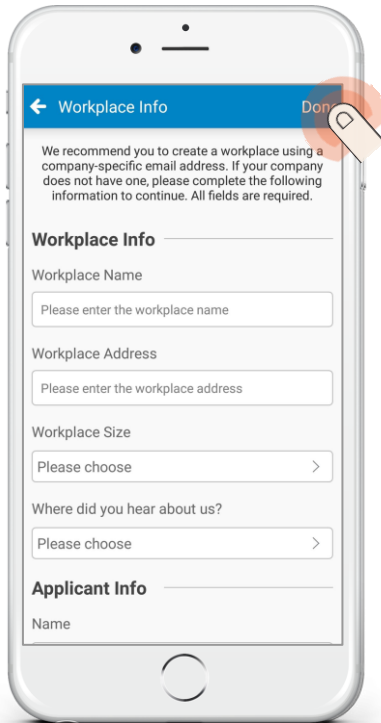
Please enter your personal workplace email. If the workplace already exists, you will enter that workplace, otherwise a new workplace will be created.

Submit

[Do not have a company email address?](#)

You are welcome to enter our demo workplace to start your experience. You can leave at any time! [Enter](#)

01 Start WorkDo



Workplace Info Done

We recommend you to create a workplace using a company-specific email address. If your company does not have one, please complete the following information to continue. All fields are required.

Workplace Info

Workplace Name

Workplace Address

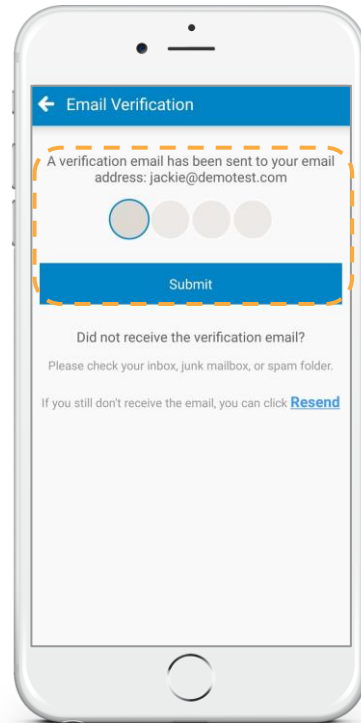
Workplace Size

Where did you hear about us?

Applicant Info

Name

02 Fill in required info



Email Verification

A verification email has been sent to your email address: jackie@demotest.com

☐ ☐ ☐ ☐

Submit

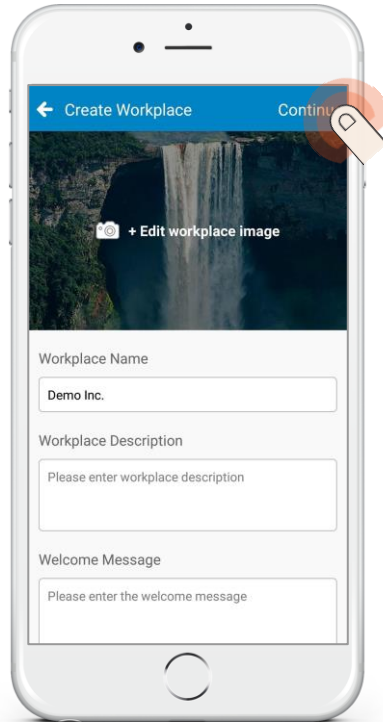
Did not receive the verification email?
Please check your inbox, junk mailbox, or spam folder.

If you still don't receive the email, you can click [Resend](#)

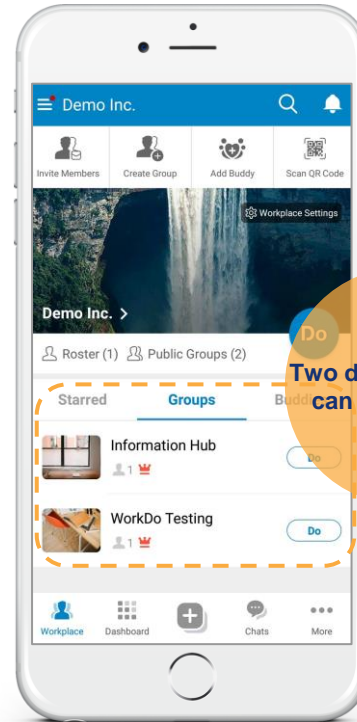
03 Verify email address



Create workplace: with free email



04 Fill out information



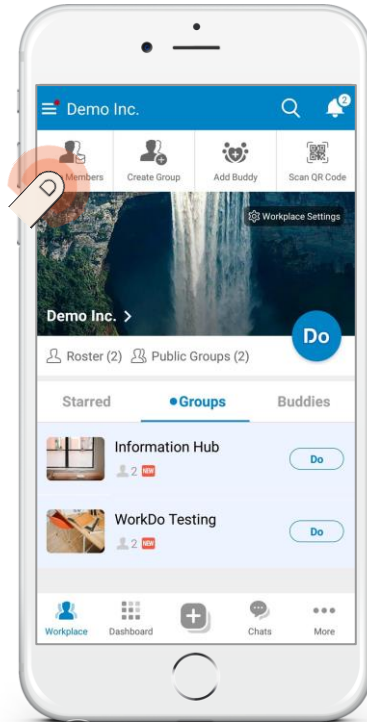
Two default groups,
can be edited or
deleted

05 Enter workplace

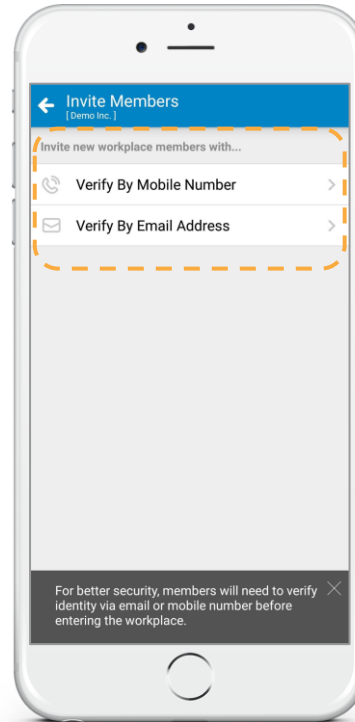
Invite coworkers to join workplace

1. Create invite specifically for coworker's email or mobile number
2. Coworker needs to verify that he/she is the owner of the email or mobile number

Invite coworkers to join workplace

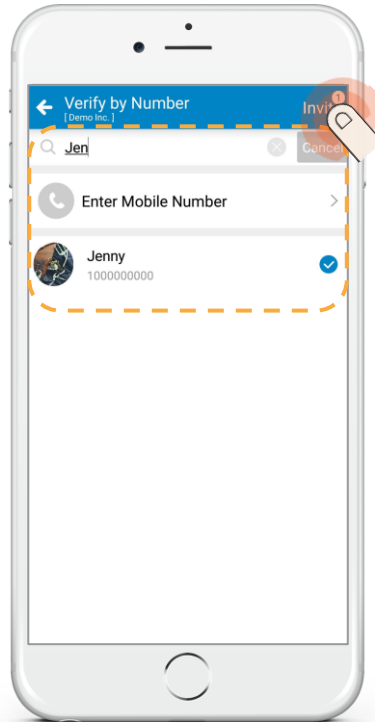


01 Invite Members

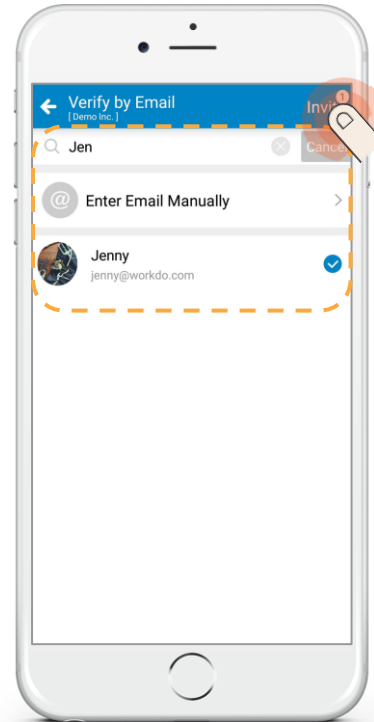


02 Create invite with

Invite coworkers to join workplace



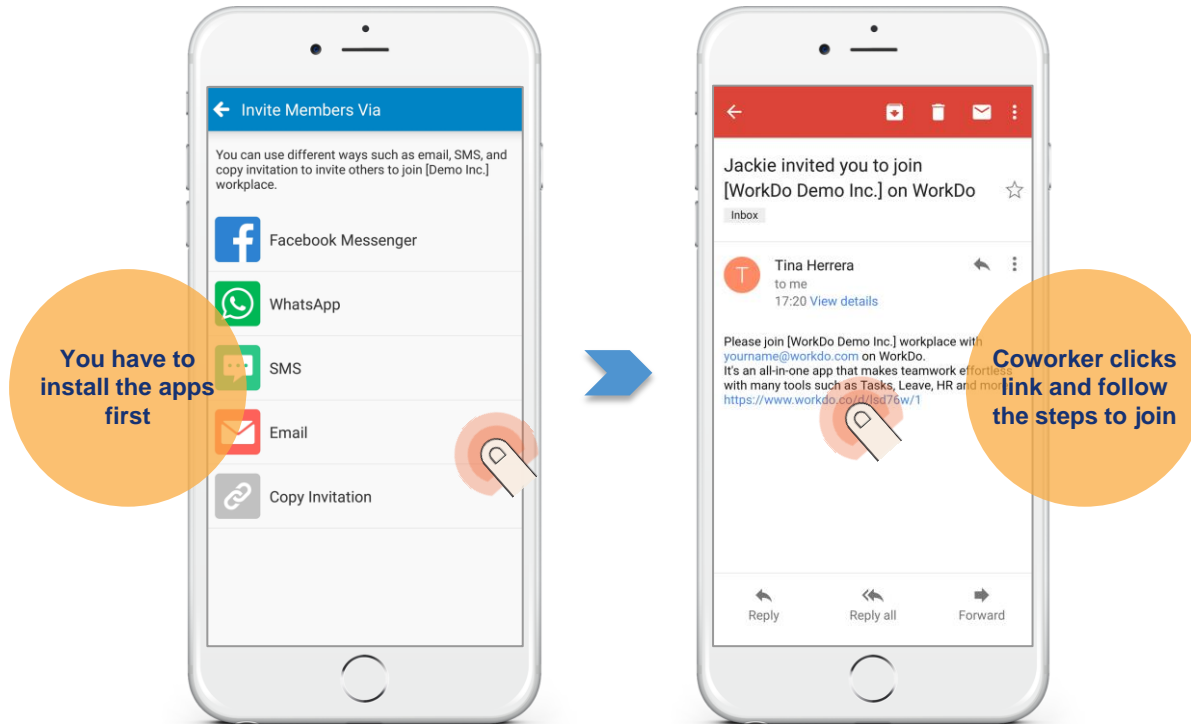
OR



03_a Verify By Mobile Number

03_b Verify By Email Address

Invite coworkers to join workplace



04 Choose a method

05 Coworker clicks link

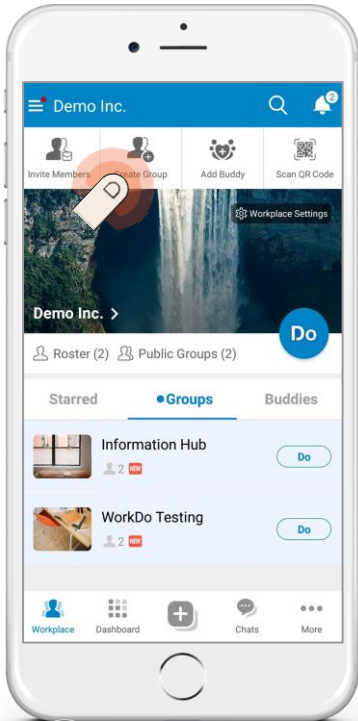


Create sub-groups

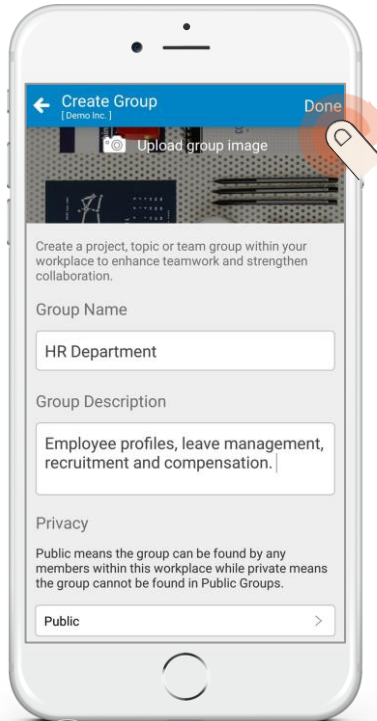
Create sub-groups for specific projects, topics and teams

A more flexible way to communicate

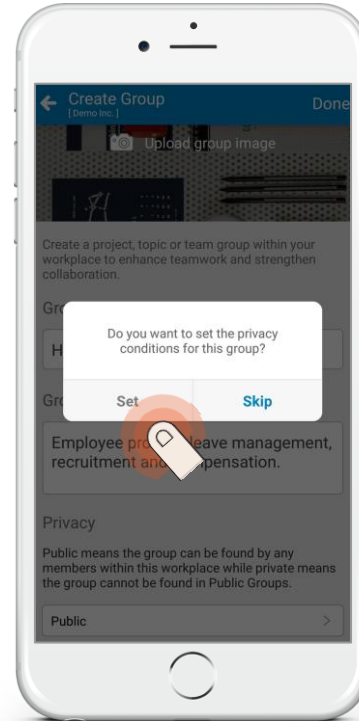
Create sub-groups



01 Create Group



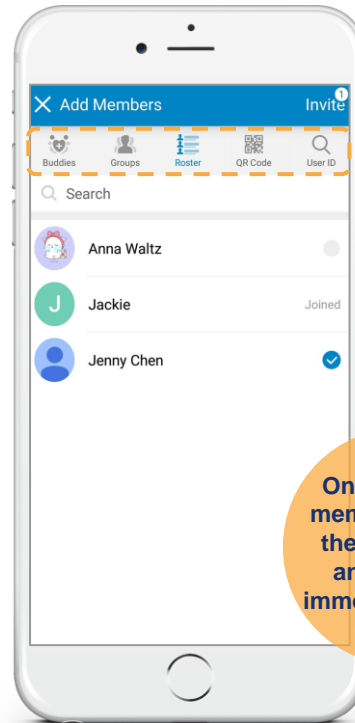
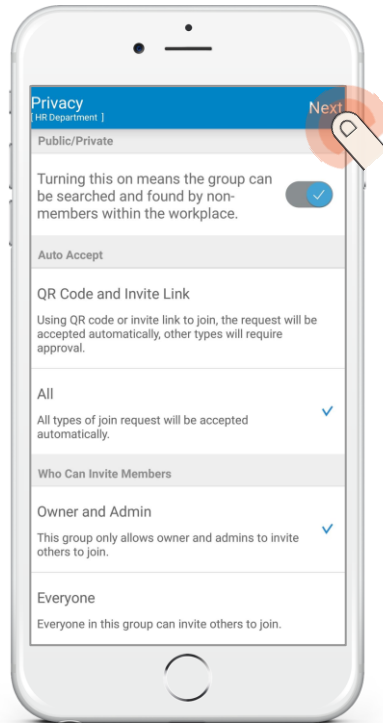
02 Fill out information



03 Click Set



Create sub-groups



Only contains members within the workplace and will join immediately after invite

04 Set group privacy

05 Choose add method

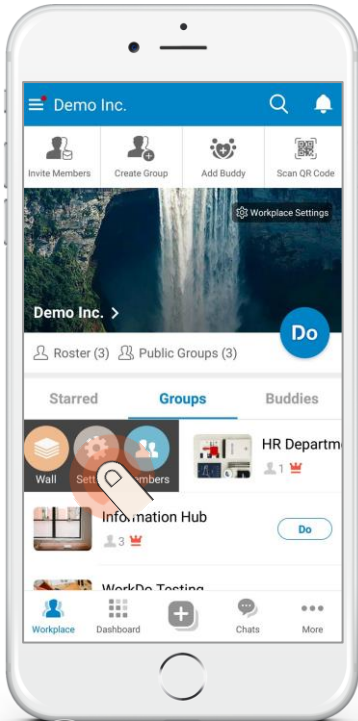


Add members to sub-groups

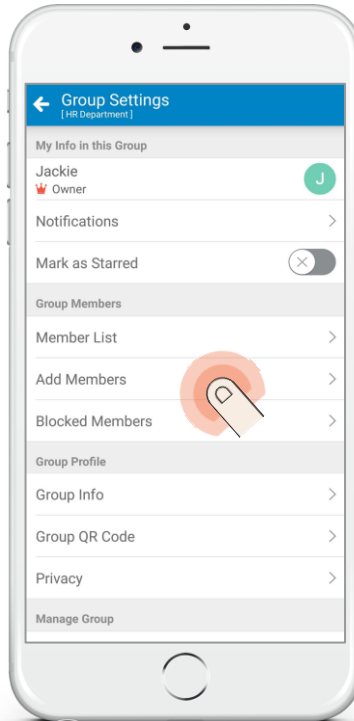
Include all members involved in the
project or special topic

Small-group communication to
enhance teamwork

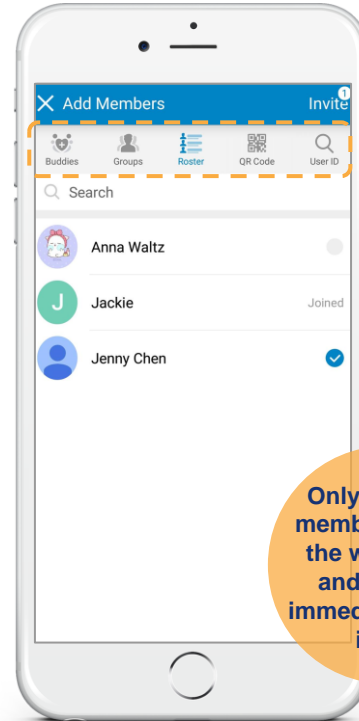
Invite members to join sub-groups



05 Group Settings



06 Add Members



07 Choose add method

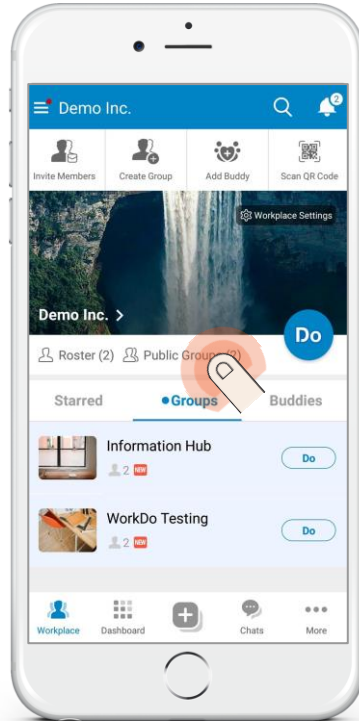
Only contains members within the workplace and will join immediately after invite



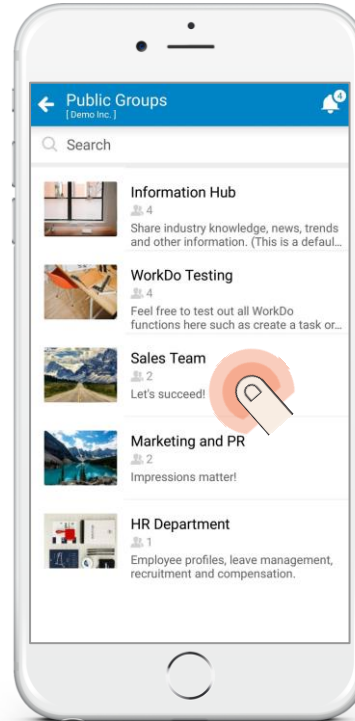
Join a sub-group

1. Find public groups
1. Join an existing team

Join a sub-group



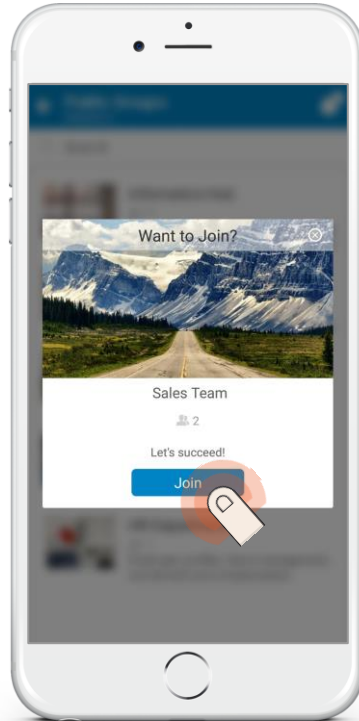
01 Public Groups



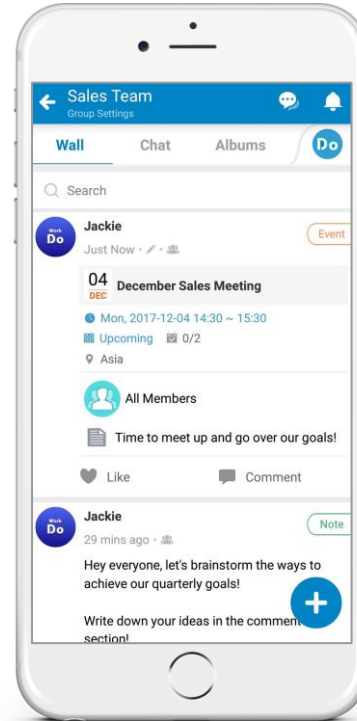
02 Choose a group



Join a sub-group



03 Join



04 Enter group wall

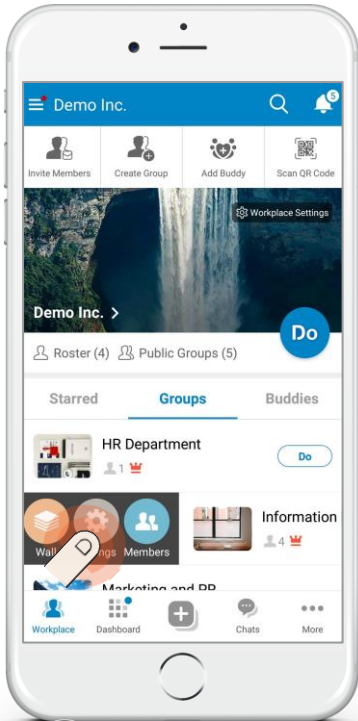


Tip: use default sub-groups

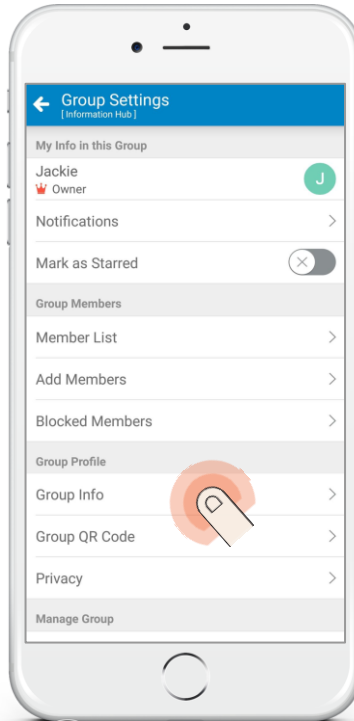
All workplaces have two default groups in which everyone that joins the workplace will automatically be in the two groups

Change the groups to workplace-wide groups

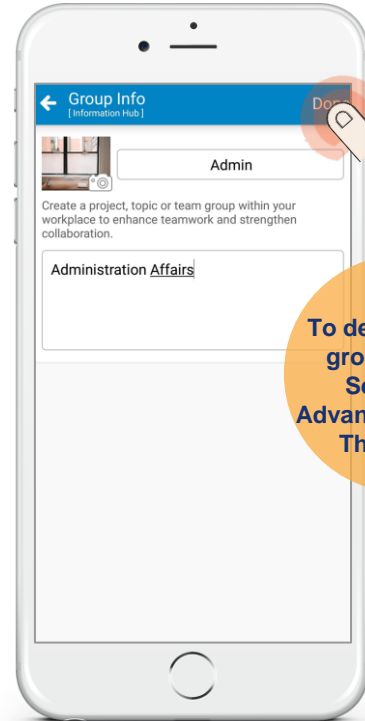
Tip: use default groups



01 Group Settings



02 Group Info



03 Change name and description

To delete default group, Group Settings > Advanced > Delete This Group

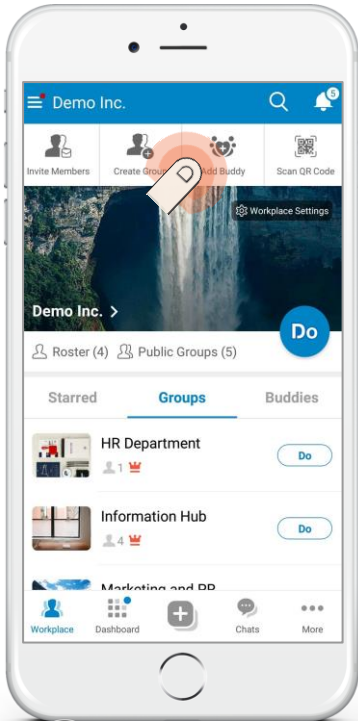


One-on-one communication

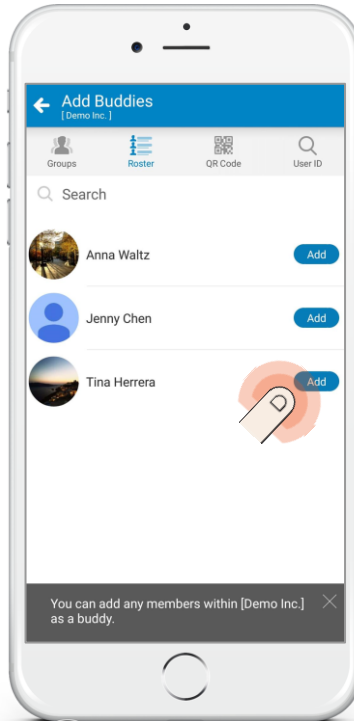
Add buddies to begin one-on-one communication

Use tools between buddies such as Tasks, Notes and Cashbook

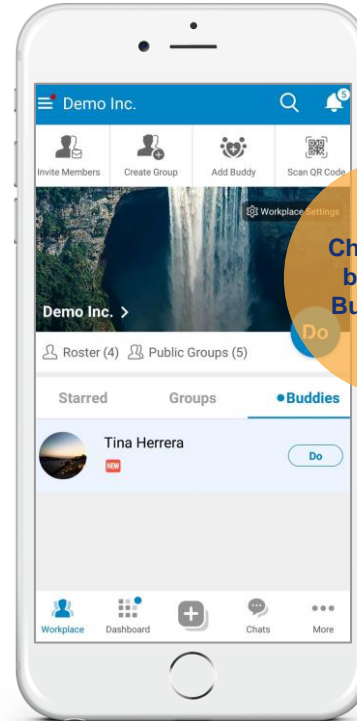
One-on-one communication: add buddies



01 Add Buddy



02 Choose member



03 Check Buddies list

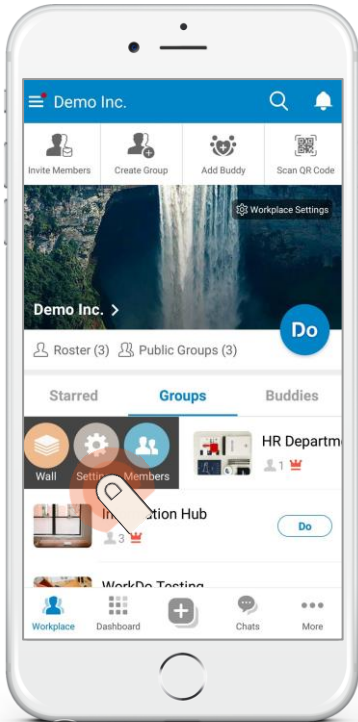
Check added
buddies in
Buddies List



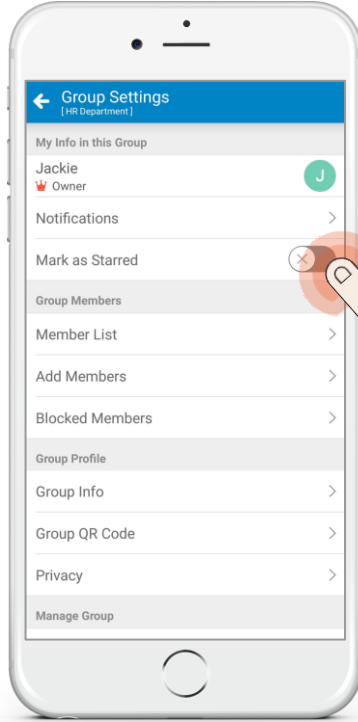
Tip: star groups and buddies

When you have many groups and buddies, you can star a few groups and buddies in order to find them quickly in Starred list

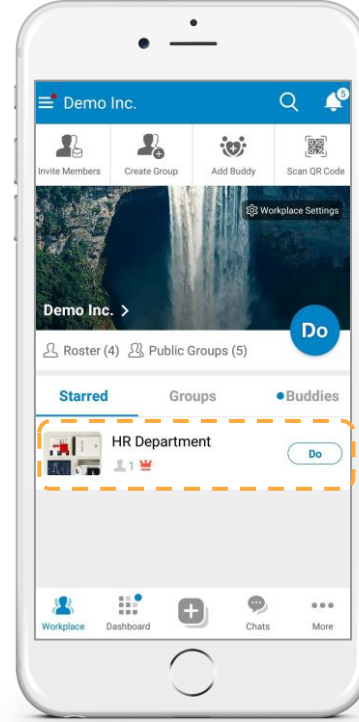
Tip: star groups and buddies



01 Group Settings

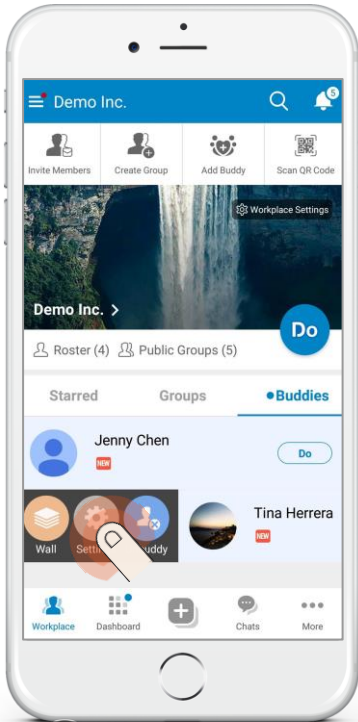


02 Mark as Starred

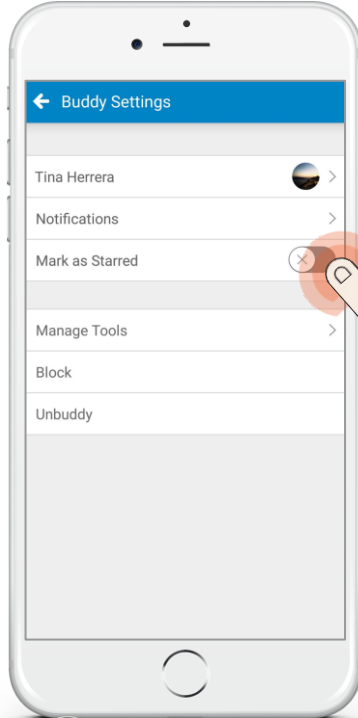


03 Check Starred list

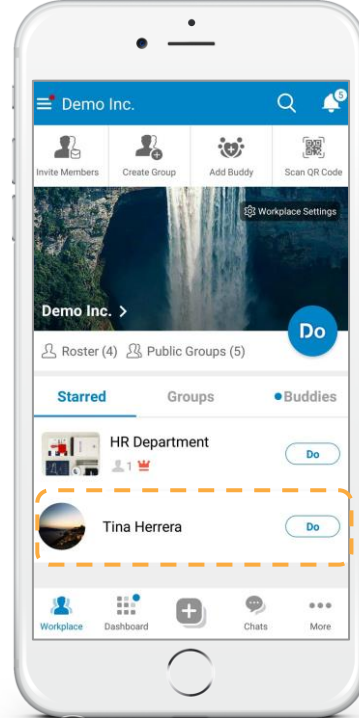
Tip: star groups and buddies



01 Buddy Settings



02 Mark as Starred



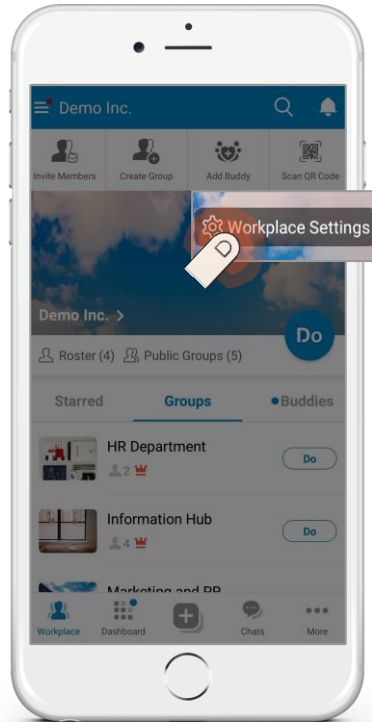
03 Check Starred list

Workplace/group admins and settings

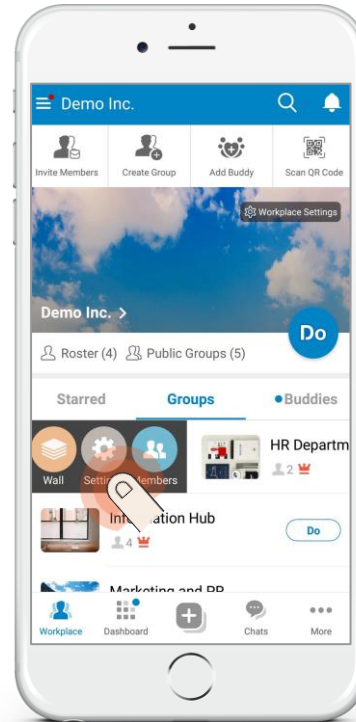
Workplace/group owners and admins have the same authority

Owners also have the right to change ownership and remove that workplace/group

Add admins to manage workplace/group



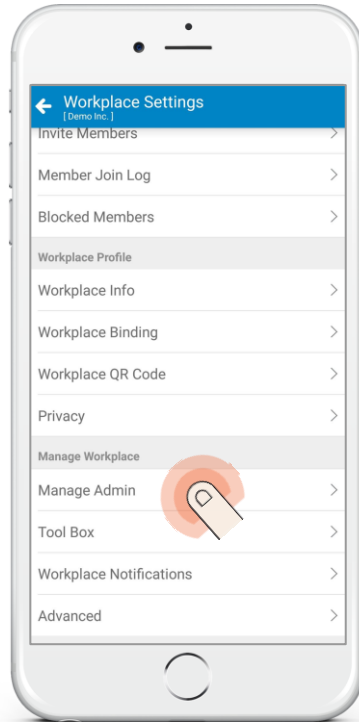
Workplace/group
have the same
settings in the
next few steps



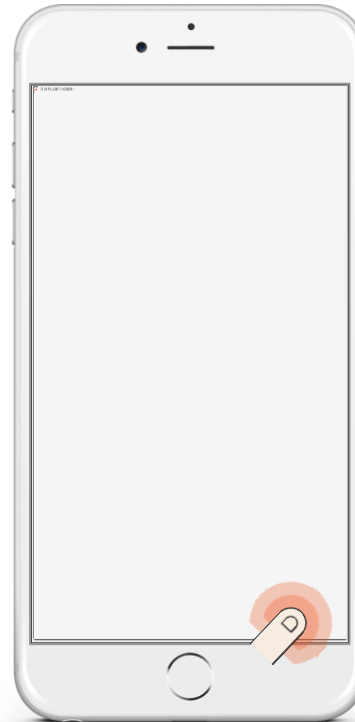
Workplace Workplace Settings

Group Group Settings

Add admins to manage workplace/group



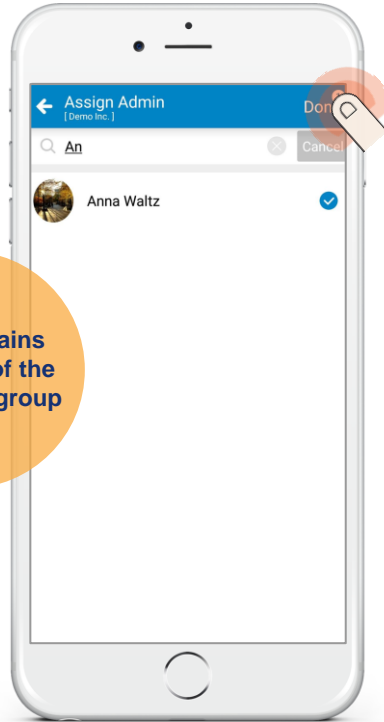
02 Manage Admin



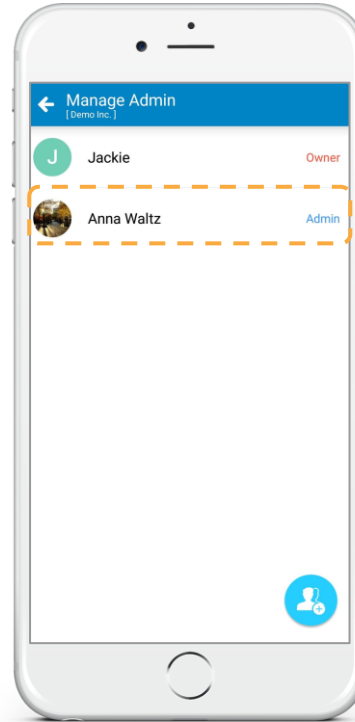
03 Assign

Add admins to manage workplace/group

Only contains
members of the
workplace/group



04 Choose member



05 Done!

Do page has many tools to use...

Workplace/group/buddy all have their own tools in Do page

Tools vary depends on where you are (workplace/group/buddy)

Workplace tools have dependency

Every level has tools (workplace/group/buddy)

Tools in Do	Workplace	Group	Buddy	Dependency
HR	•			
Leave	•			HR
Leave Pro	•			HR
Expenses	•			HR
Attendance	•			HR
Approvals	•			HR
Conf. Rm.	•			
CRM	•			
Phonebook /Cashbook	•	•	•	
We Buy/IOU	•	•		



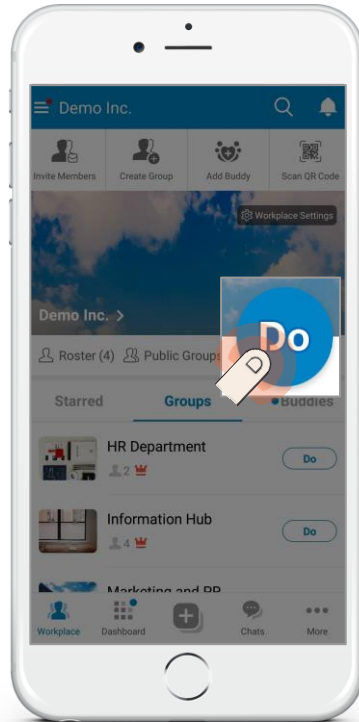
Activate tools and manage tool roles

Set different tool roles for different members

Manage leave or expense requests easily

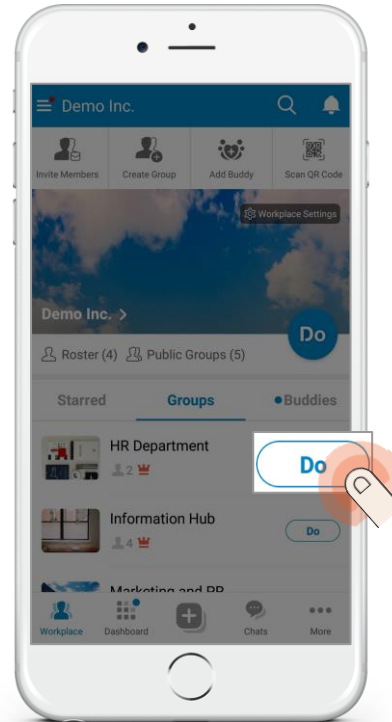
[Table of Contents](#)

Activate tools and manage tool roles



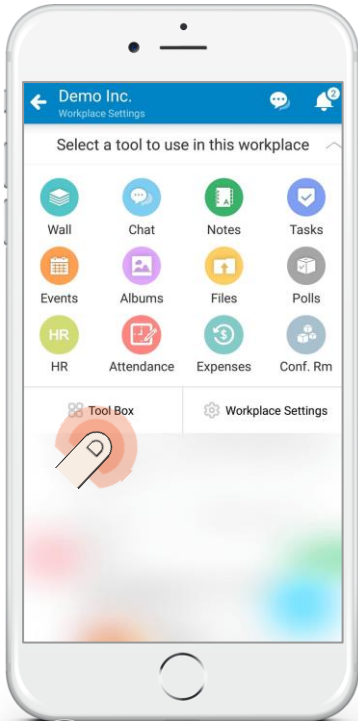
Workplace Do

Workplace/group/buddy all have a set of tools, click Do to find out

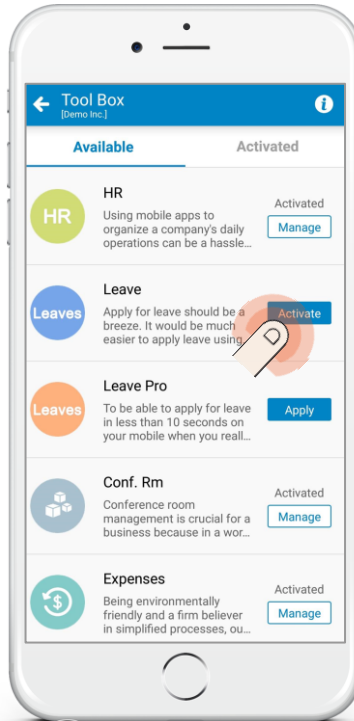


Group Group or buddy Do

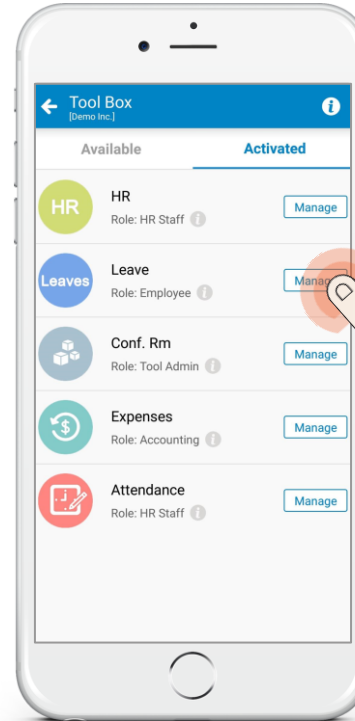
Activate tools and manage tool roles



02 Tool Box



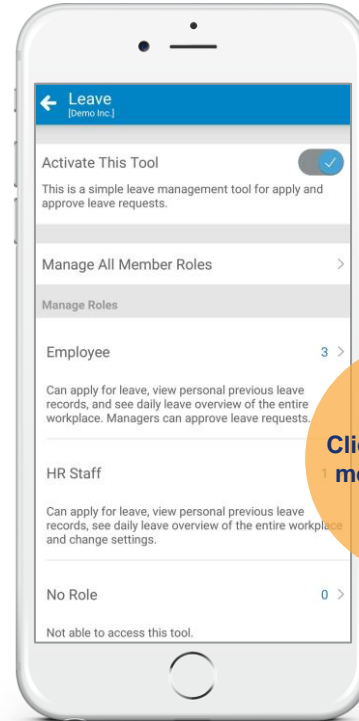
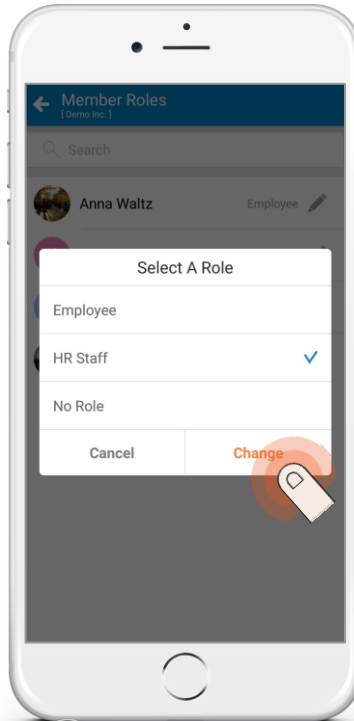
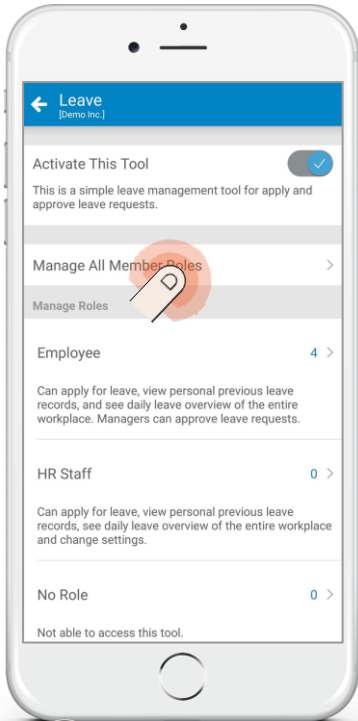
03 Available > Activate



04 Manage



Activate tools and manage tool roles



Click to check all members' roles

05 Manage All Member Roles

06 Choose new role > Change

07 Done!

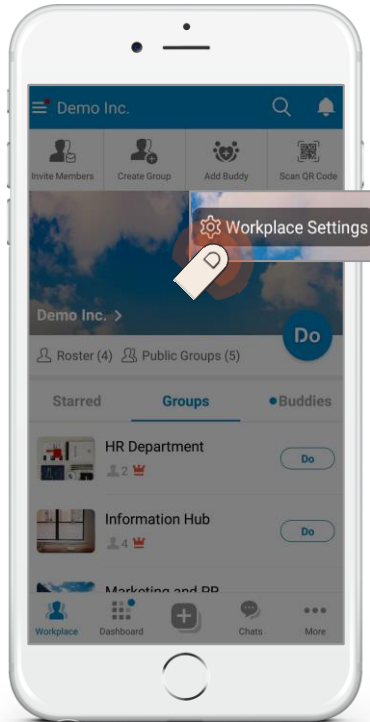


Change privacy settings

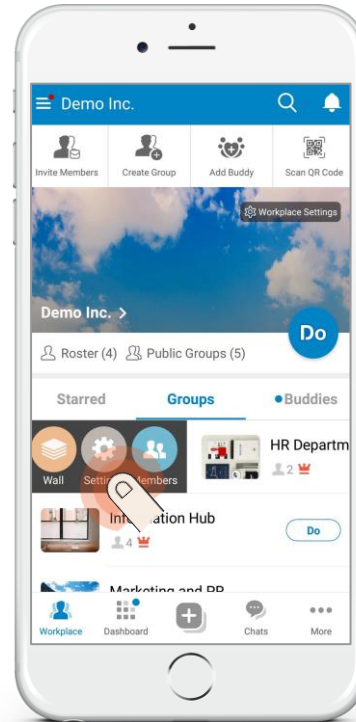
Workplace/group have privacy settings

Read carefully before changing privacy settings

Change privacy settings



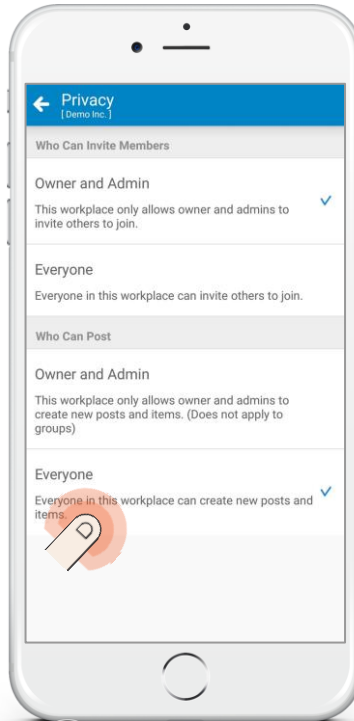
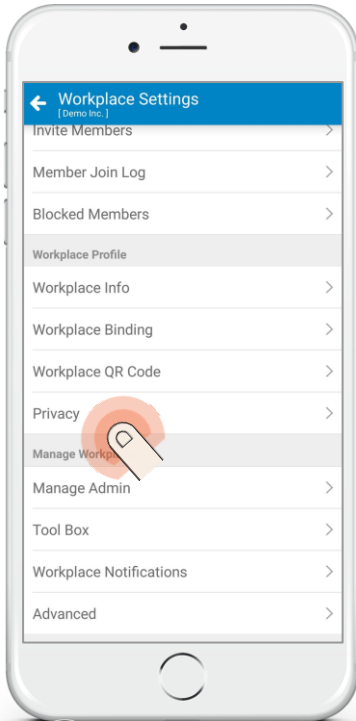
Workplace/group
have different
privacy settings



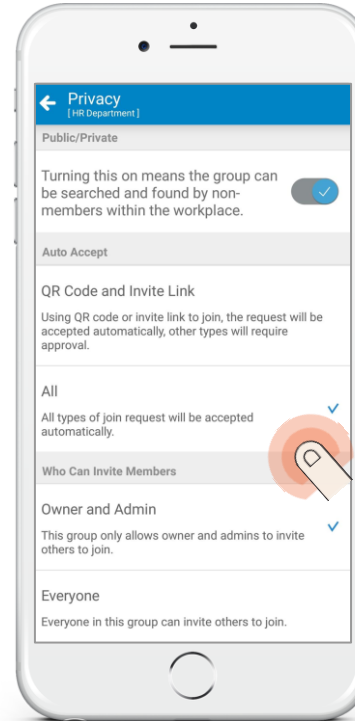
Workplace Workplace Settings

Group Group Settings

Change privacy settings



OR



02 Privacy

03a Workplace Privacy Settings

03b Group Privacy Settings

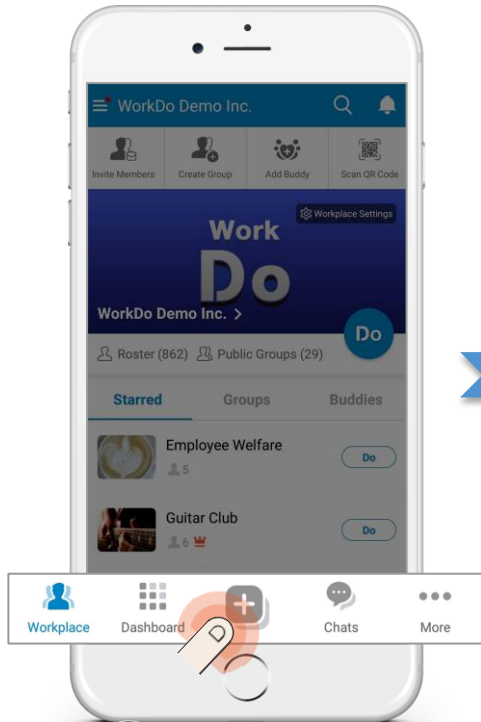
Create items (six basic tools)

Workplace/group/buddy all have
six basic tools

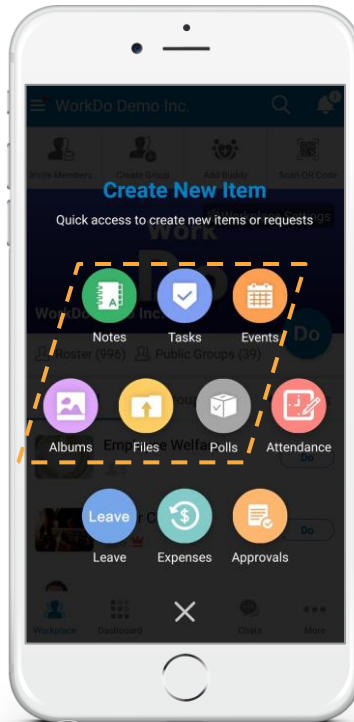
Enhance communication

Use + button to create items
quickly

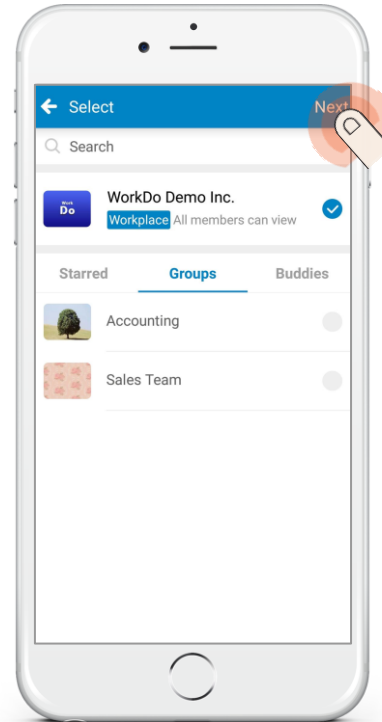
Use + button to create items quickly



01 +

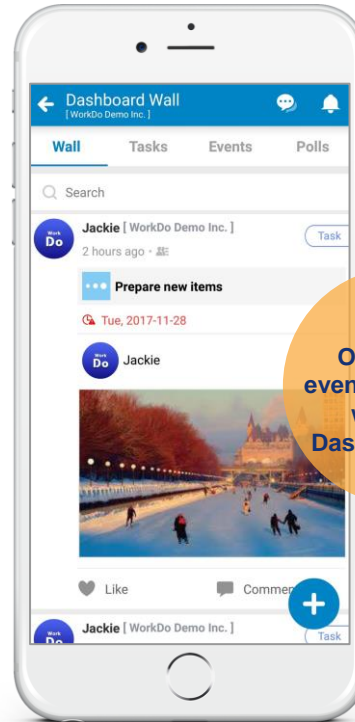
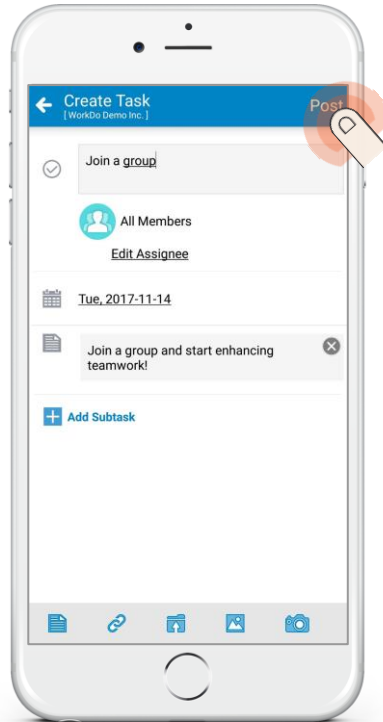


02 Choose tool



03 Choose where

Use + button to create items quickly



Only tasks,
events, and polls
will be in
Dashboard Wall

04 Fill out fields > Post

05 View in Dashboard Wall

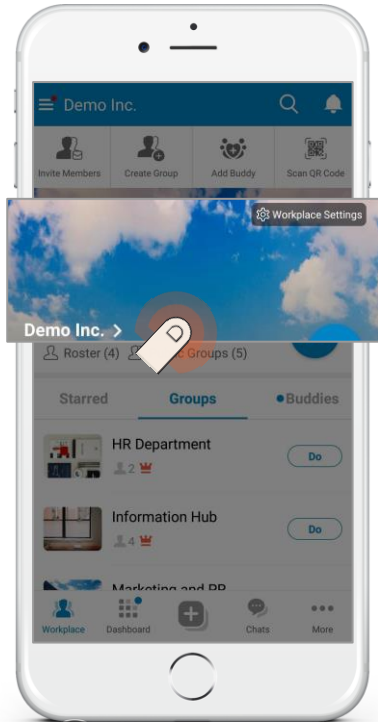


View posted items

View posted items in
workplace/group/buddy wall

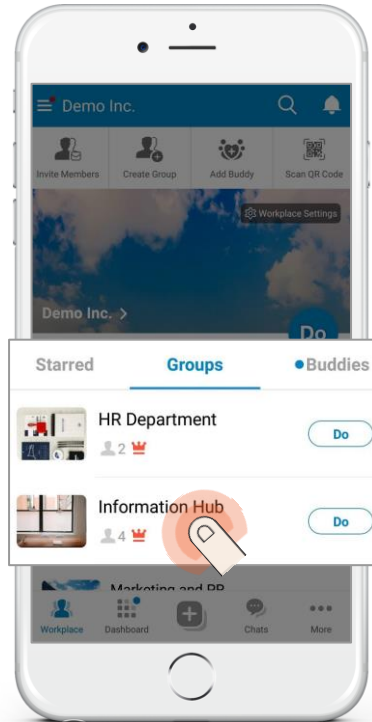
Table of Contents

View posted items: workplace/group/buddy



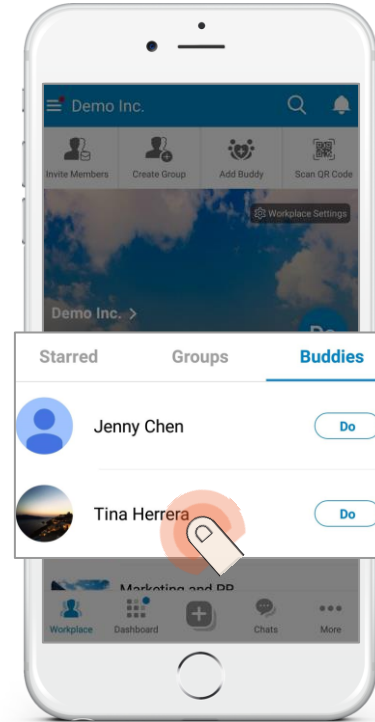
01_a Click workplace image

OR



01_b Click group

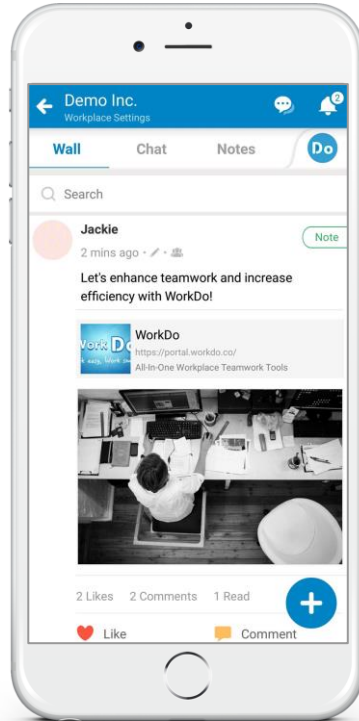
OR



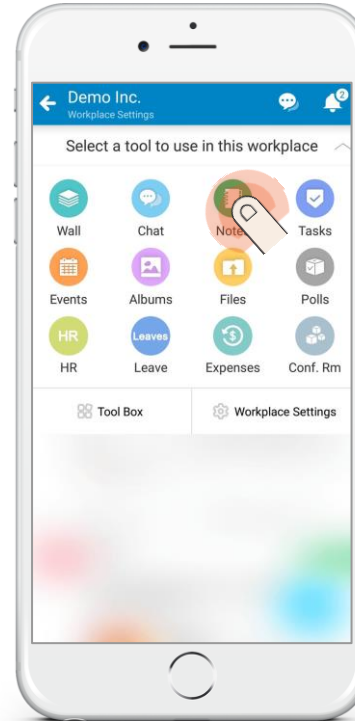
01_c Click buddy



View posted items: Notes



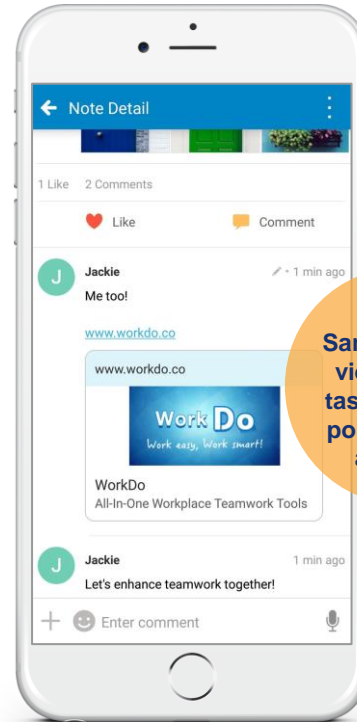
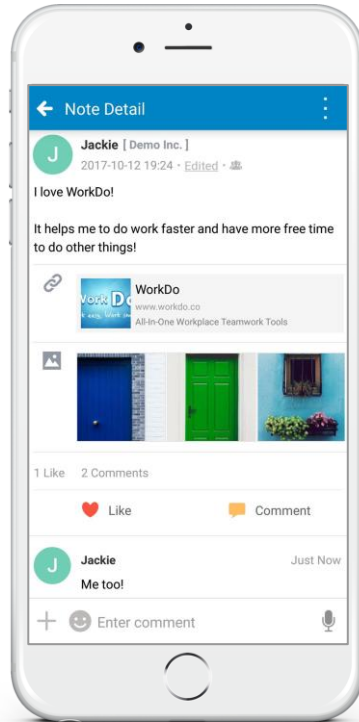
OR



02_a Wall > Scroll up/down

02_b Do > Choose Notes

View posted items: Notes



Same steps to
view posted
tasks, events,
polls, albums
and files

03_a Click to enter note detail

03_b Like/Comment

Oops, I made a mistake, need to fix it

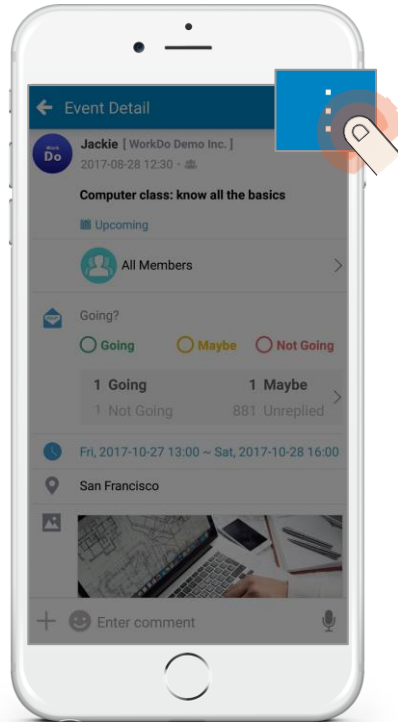
Don't worry

[Back to the steps on previous
slides to enter detail](#)

Edit, delete, discard, close, remind,
share, forward and help

[Table of Contents](#)

Edit posted items: Events



Different basic tools have different action buttons in More

04 More button

05 Action buttons



My Shelf

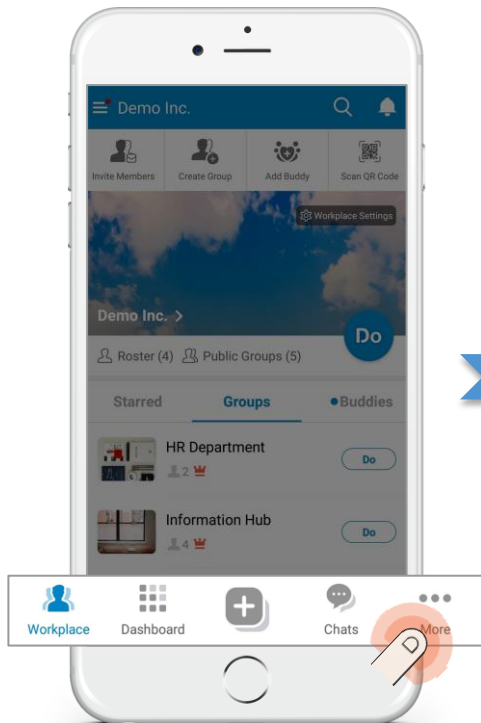
A private place to keep every
personal item

Notes/Tasks/Events/Albums

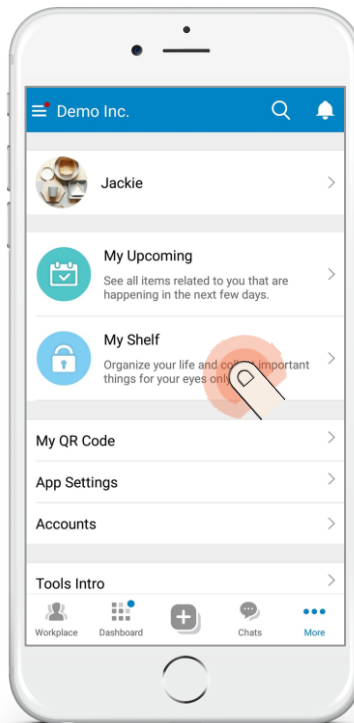
Keep everything organized

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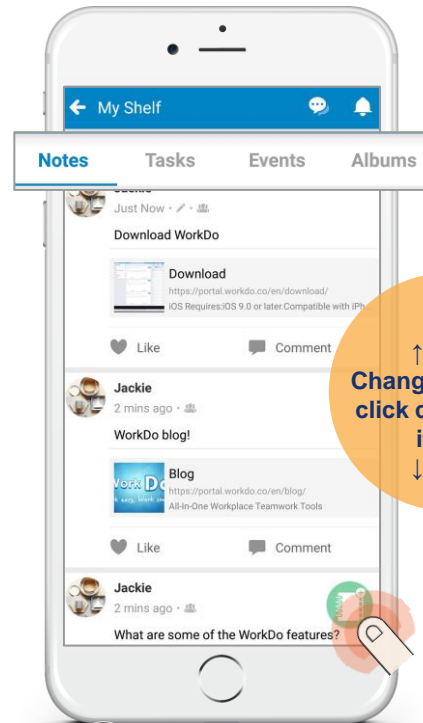
My Shelf



01 More



02 My Shelf



03 Stay organized

↑↑↑↑↑
**Change tabs and
click create new
items**
↓↓↓↓↓

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