

WorkDo
Quick Start

Settings

Getting Started!



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V220407

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1. About WorkDo

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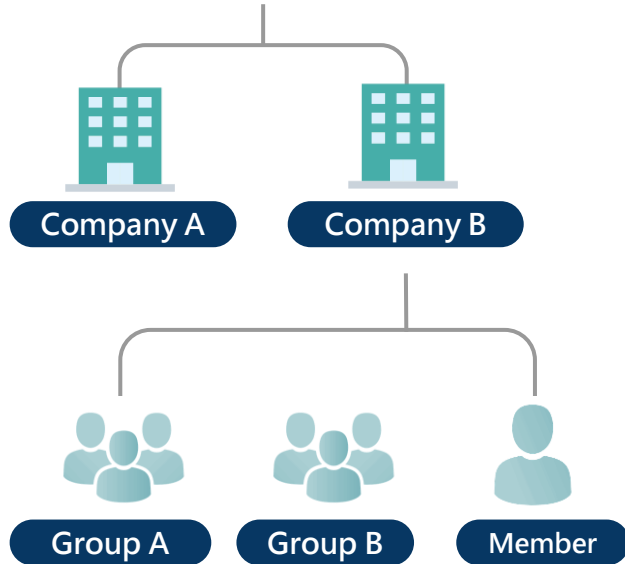
1.1 Management

- Clear organizational structure
- Easy information flow management

1.1 Security & Flexibility

Best
Choice

WorkDo



Company *Manage with ease*

- Manage multiple company branches.
- Authorized on-boarding process.

Group *Improved communication*

- Create groups based on topics, projects or departments.
- Admin - Controls tool access and members' roles.
- Member - Uses tools enabled for collaboration.

Member *High security*

- On-boarding ([By company email domain/Invite link](#))
- Work anytime, anywhere.
- Communicate whenever the inspiration hits.

1.2 All You need is Right Here

Workplace / Groups / Buddies / Member
WorkDo has all the tools you need to get the job done!

1.2 Basic Tools for Daily Routines

Basic Tools	Ann.	Notes	Tasks	Events	Albums	Files	Links	Polls	Wall Dashboard Calendar	Chats Audio/ Video Call	Approvals
Company	●	●	●	●	●	●	●	●	●	●	●
Group		●	●	●	●	●	●	●	●	●	
Buddy		●	●	●	●	●	●	●	●	●	
Member Private Space		●	●	●	●	●	●		●		

1.2 All-Purpose Collaboration Tools

Announcements

For policies, guidelines, bulletins.

Emphasis on timeliness.

Notes

Topics of discussion.

Knowledge share.

Tasks

Task assignment.

Progress track.

Events

Set company events.

Shows participants.

Files

File & document share.

Albums

Photo share.

Show proofs.

Links

URL link share.

Polls

Create opinion polls.

Conduct fair votes.

1.3 Collaboration Tools

Communication, Collaboration, Management

Whatever the job, there is a tool for it!

More features to come!

1.3 Collaboration Tools at Your Disposal



Workflow Management

Dashboard, Wall,
Calendar, Workflow



Approval Sign off

Expenses
Approvals



HR Management

HR
Attendance
Check-In
Leave, Leave Pro
Overtime, Shift
Payroll



CRM

CRM
Phonebook



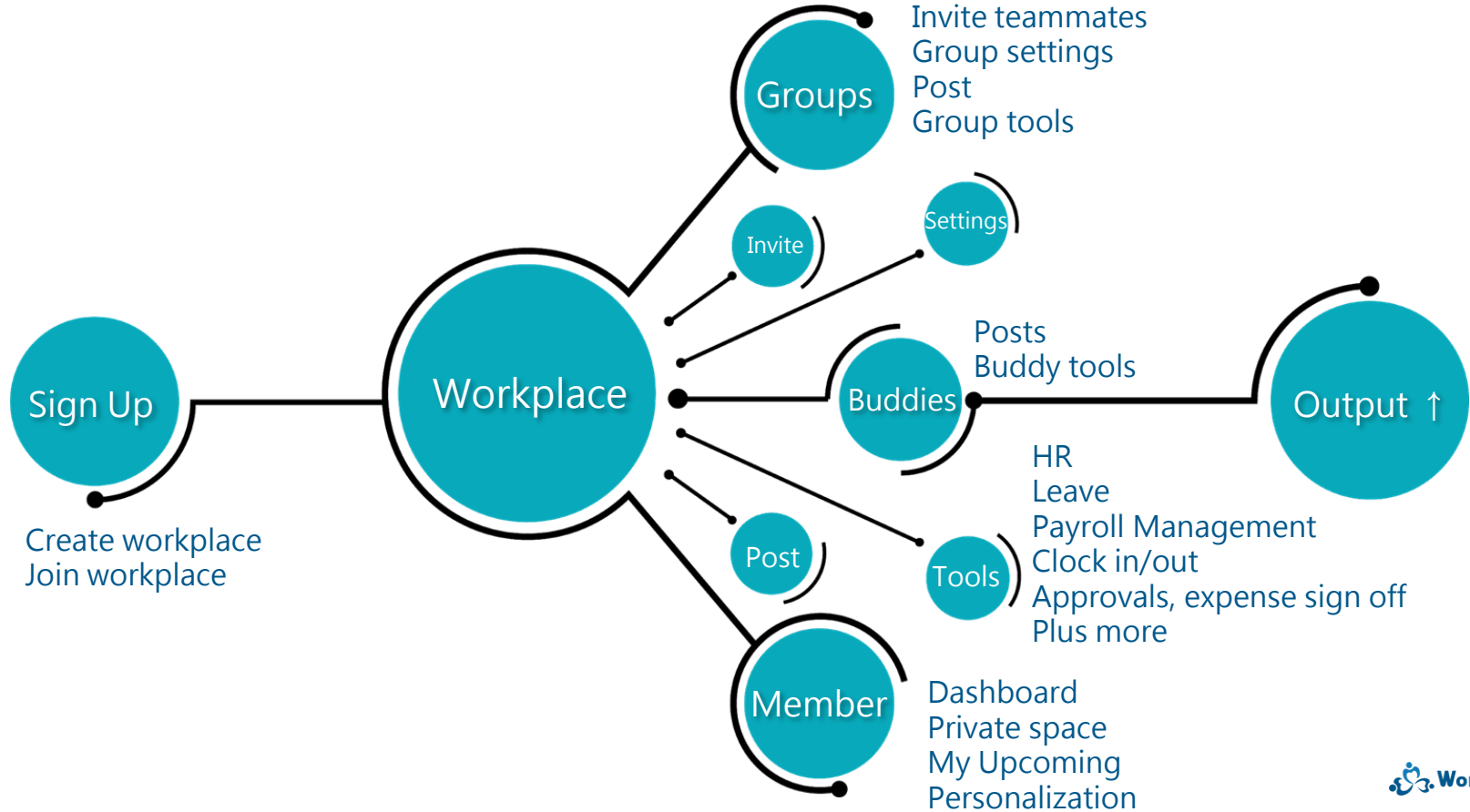
Digital Management

Conf. Rm,
Cashbook
We Buy, IOU

1.4 Experience It!

[Experience the convenience](#) WorkDo can bring to your workplace NOW!

1.2 WorkDo Handles Everything!



1.5 Is It Difficult to Set Up?

Not at all!

Follow our steps and get your team up and running in no time!

1.5.1 WorkDo Keeps Everyone in the Loop!

Everything work-related is right here!

1.5.1 Workplace Domain

1. Workplace list

Workplaces, Private Space and WorkDo Network, it's all here!

2. Workplace & setting

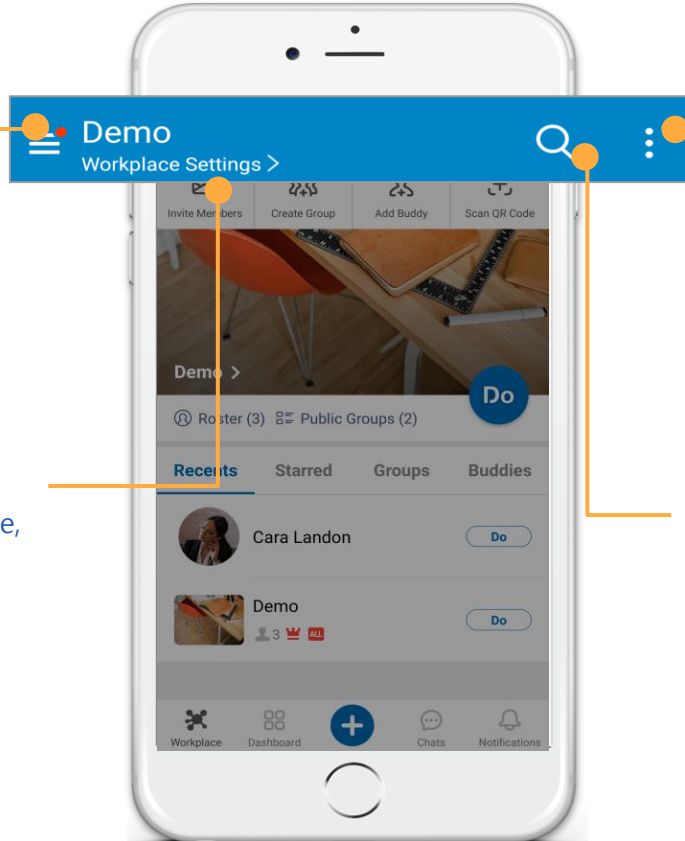
- Shows your current workplace, group, buddy and settings.
- Click to change the privacy, notification and personal settings.

4. More

Account, app settings, Resource Center, feedback and more.

3. Search

Search option available.



1.5.2 Speed is of the Essence

Simple

Convenient

Work easy, Work smart!

1.5.2 Speed is of the Essence

2. Dashboard

An overall look of all things that are pertaining to you. Get an outlook of your day!

1. Workplace

Engage workplace, groups and buddies interactions here.

3. + Create New

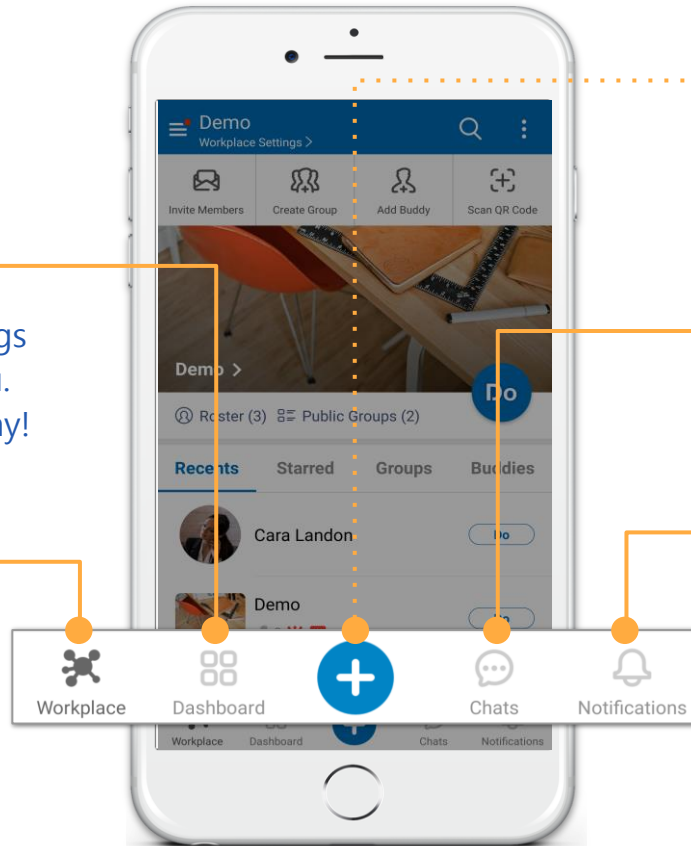
Assign tasks, apply leaves, add notes or what have you, everything begins here.

4. Chats

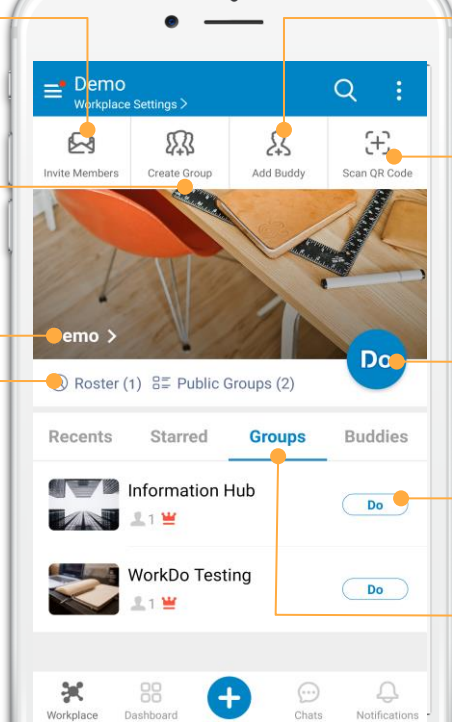
Group and buddy IM.

5. Notifications

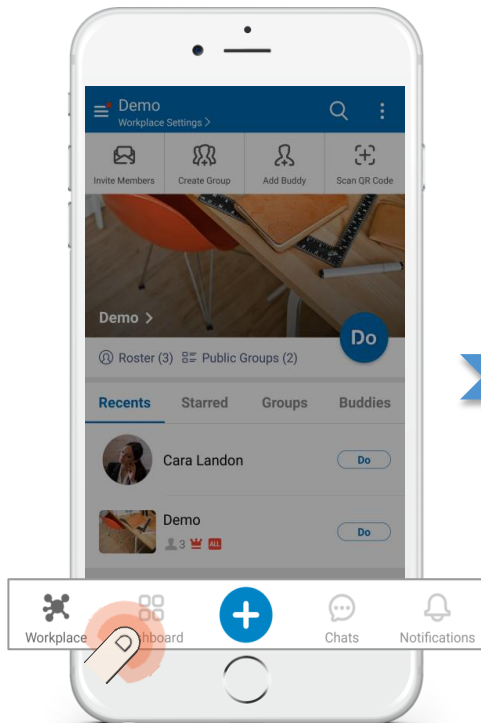
Notifications of things that pertaining to you.



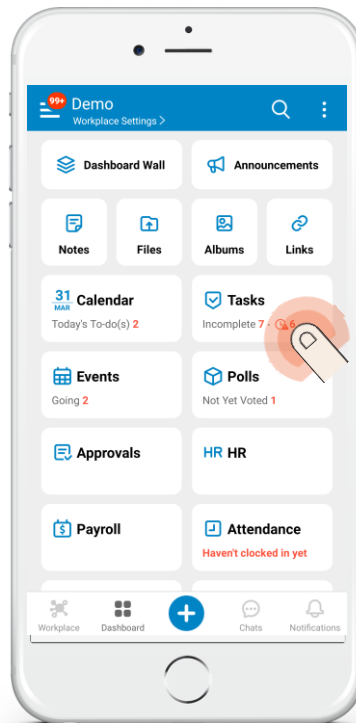
1.5.2 Tools You Need to Get the Job Done!

- 
- 1. Invite Members**
Invite members to join the workplace.
 - 2. Create Group**
Create groups for any project or topic you wish.
 - 3. Add Buddy**
Offers 4 ways to add buddies.
 - 4. Scan QR Code**
Scan the QR code to add new groups or buddies.
 - 5. Workplace Wall**
See what's going on in the workplace.
 - 6. Roster & Public Groups**
View workplace members and public groups you can join.
 - 7. Do Tools**
Access all the tools and start collaborating.
 - 8. Group & Buddy List**
Switch between groups and buddies.

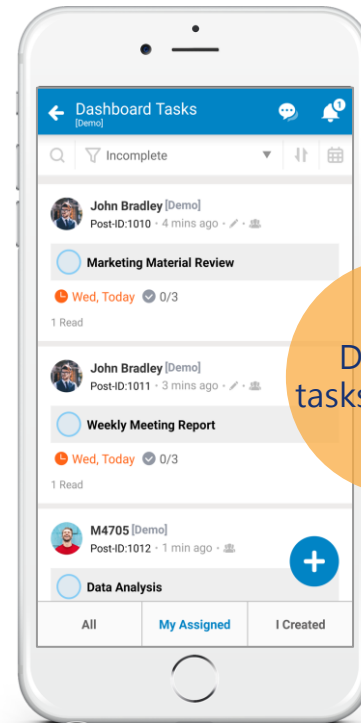
1.5.2 Dashboard: Your Day at a Glance!



01 Dashboard



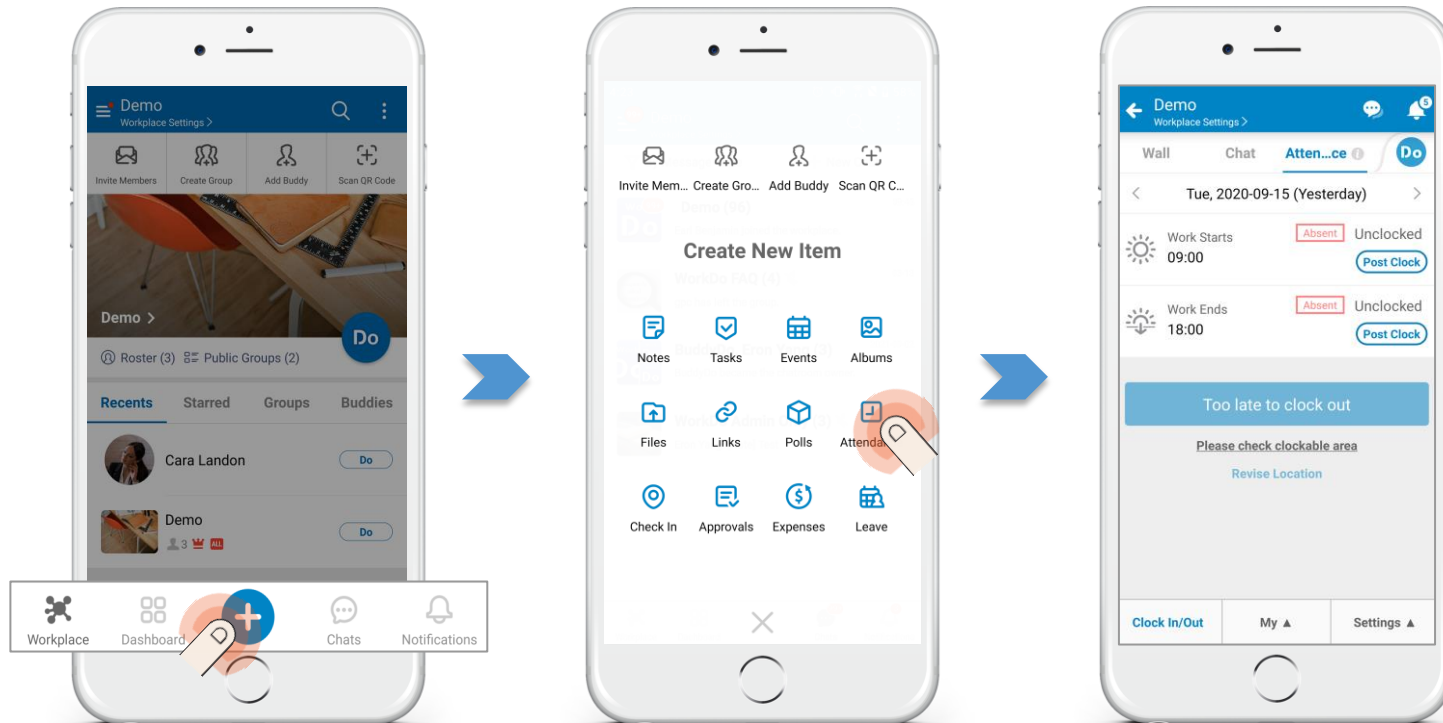
02 Your to-do list



03 Clear & intuitive

Different tasks, different tabs.

1.5.2 Quicker Tool Access with +

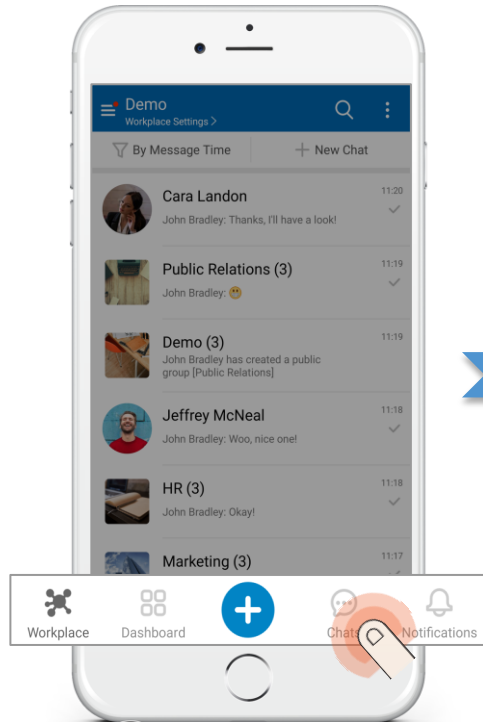


01 + Create

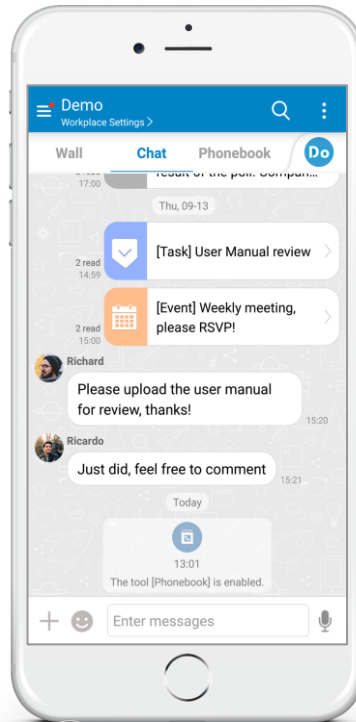
02 Select a tool from your frequently used tool list

03 Quick tool access

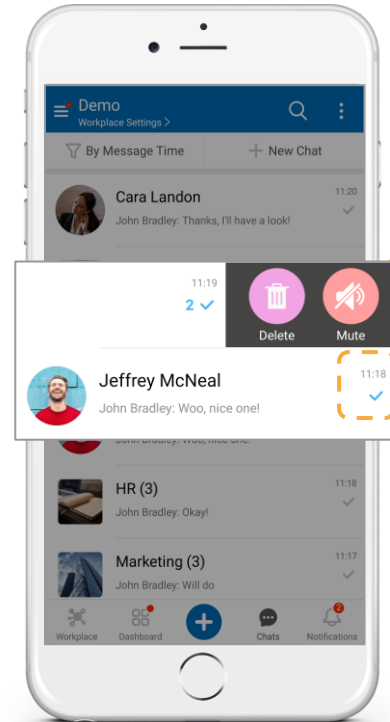
1.5.2 Real-Time Instant Messenger



01 Chats



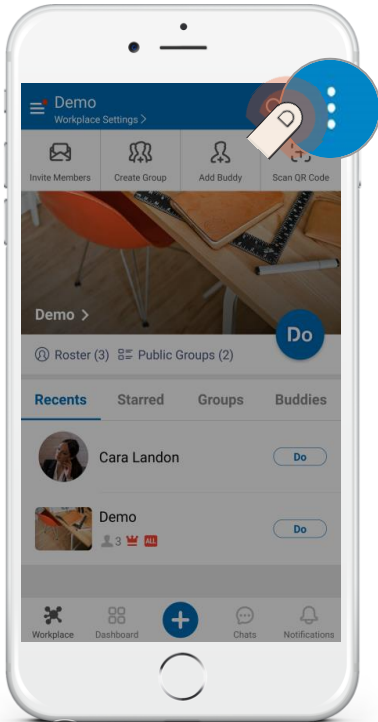
02 Keeps you in the loop



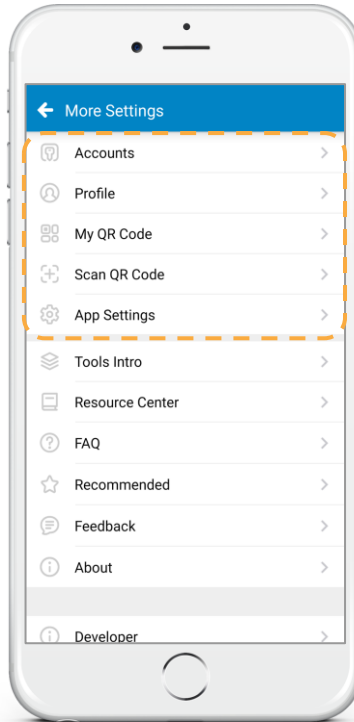
03 Did you know?

→ Swipe for hot keys
→ Read receipt available

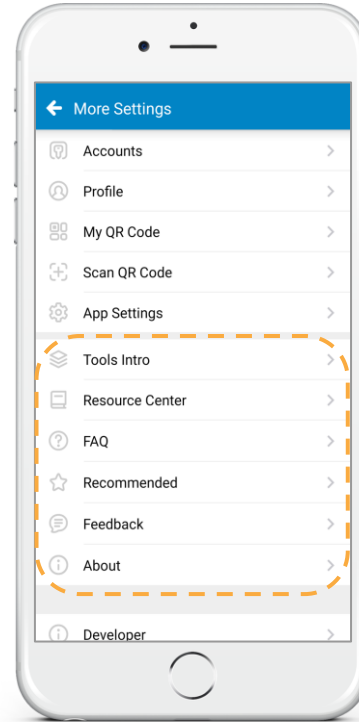
1.5.2 Personalize Your App



01 Click more for settings



02 Personalize your app

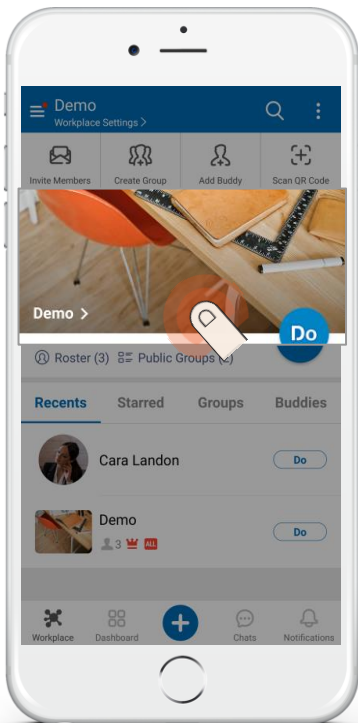


03 Help is here!

1.6 Levels

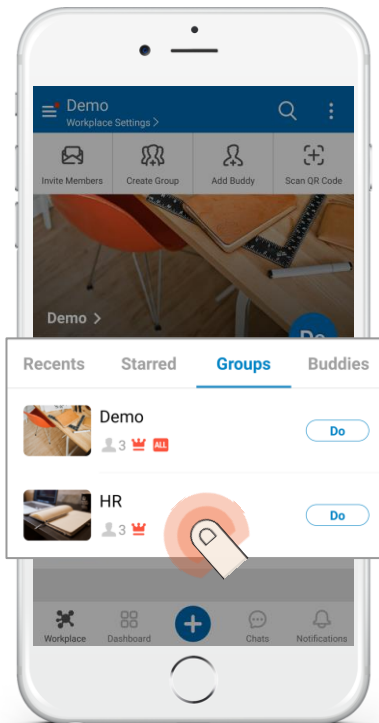
View, Create, Edit
Workplace, Group & Buddies
Consistent UI

1.6 Information Compartmentalized



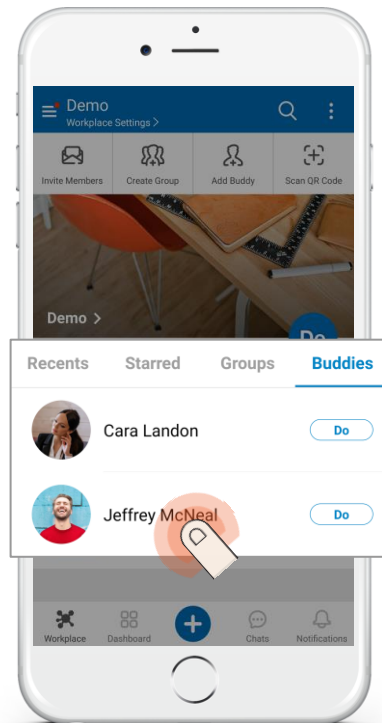
01_a Workplace banner

OR



01_b Select a group

OR



01_c Or a buddy

1.6 Unified UI Across All Levels

1. Wall & Search

- A wall for each workplace, group and buddy
- Wall keeps track of Notes, Announcements, Tasks, Events, Albums, Files, Links & Polls

2. Chats

Enter the chatroom of the current workplace, group or buddy.

3. Do Tool

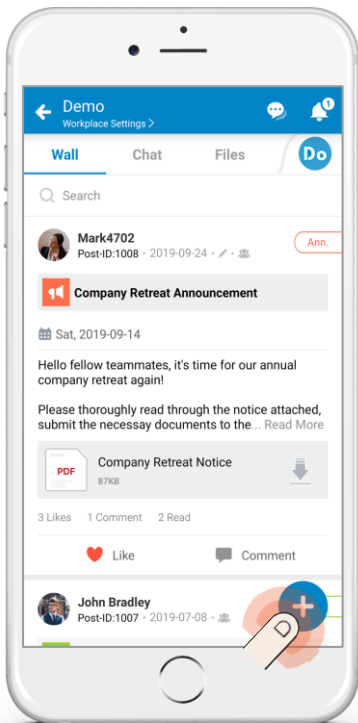
Access a list of tool to within the current workplace, group or buddy.

4. Quick Tool

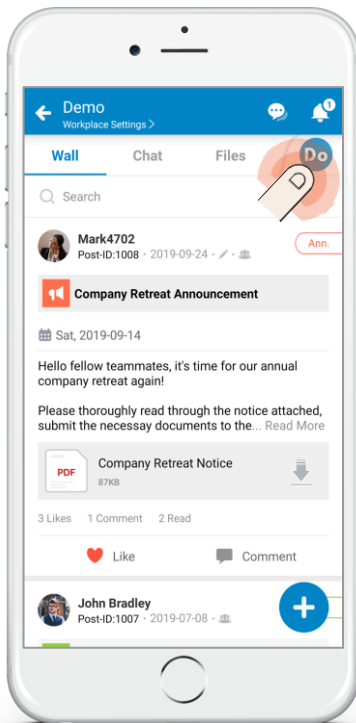
Default quick tool is set to Files or the last tool used.

5. + Create New

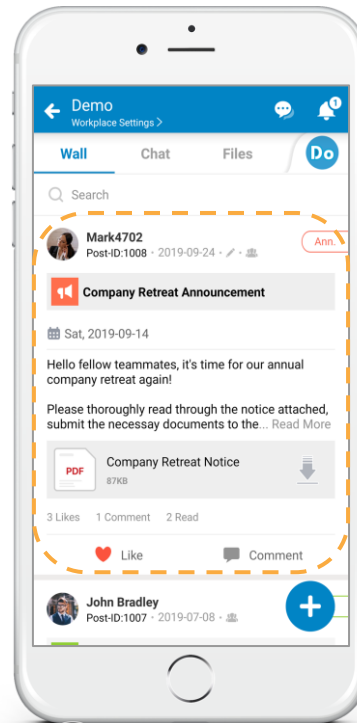
1.6 Compartmentalized Information



OR



OR



02a Add with +

02b Tool switch with Do

02c Click and swipe for detail

2. Create & Invite

2.1 [Create Workplace \(Company Email Domain\)](#)

2.1.1 [Member Invite: Via Company Email Domain](#)

2.1.2 [Member Invite: No Company Email Domain](#)

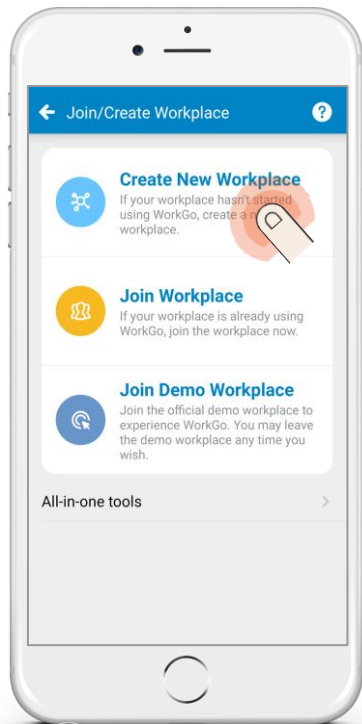
2.2 [Create Workplace \(Free Email Domain\)](#)

2.2.1 [Members Invite](#)

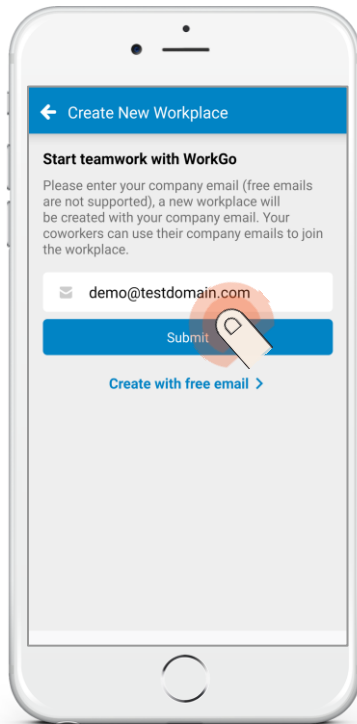
2.1 Create Workplace (Company Email Domain)

- ◉ Accounts bind with company email for secure access control.

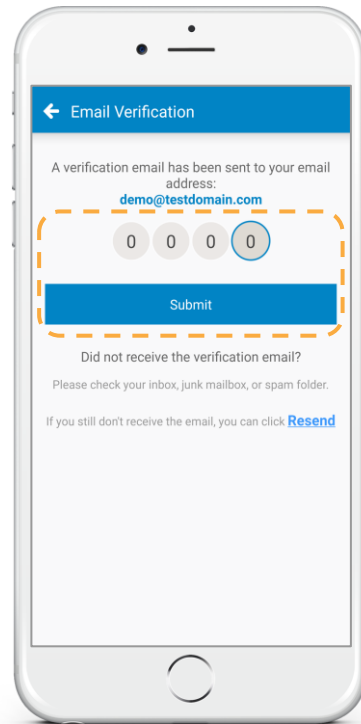
2.1 Easy On Boarding Process with Company Email Domain



01 Create workplace

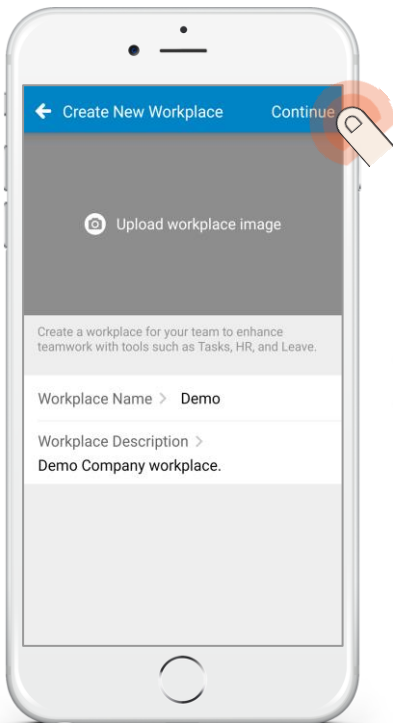


02 Input domain email

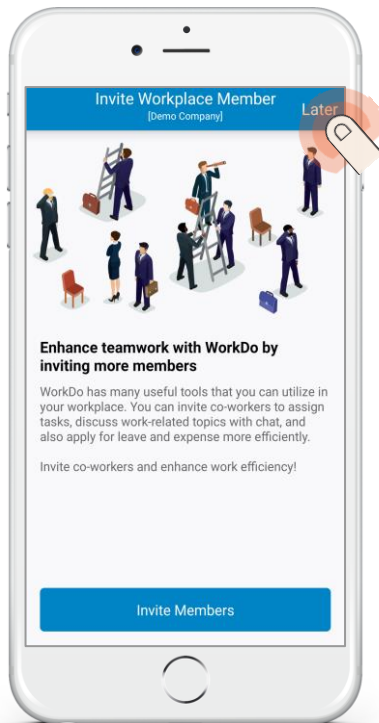


03 Input verification code

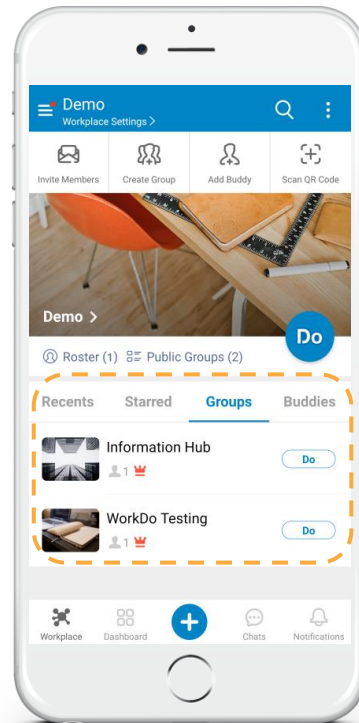
2.1 Create Workplace via Company Email Domain



04 Name your workplace



05 Later (Member Invite)



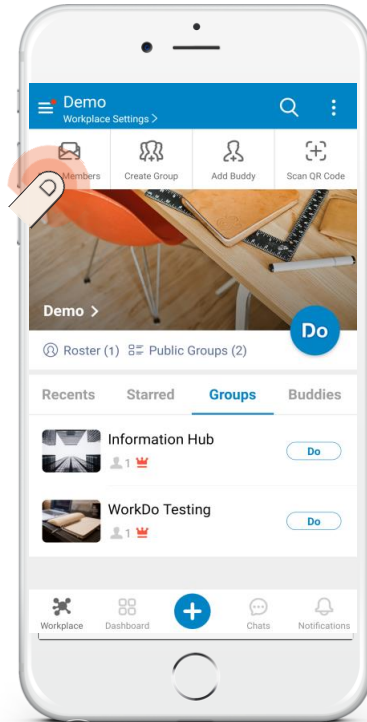
06 Done!

2.1.1 Member Invite

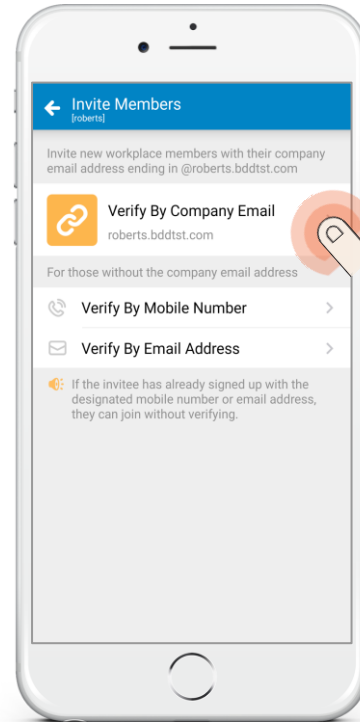
Via Company Email Domain

- ◉ [Auto join](#) with the same company email domain.
- ◉ Create invite links.

2.1.1 Member Invite (Via Company Email Domain)

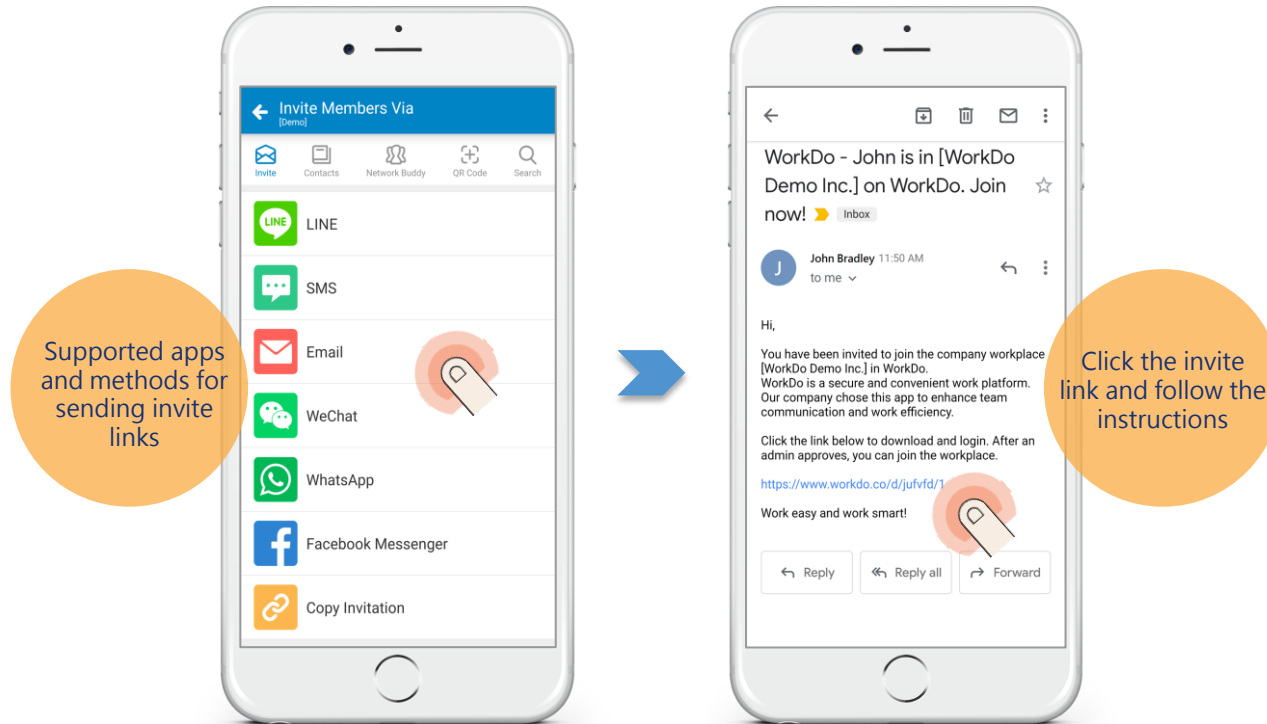


01 Invite members



02 Invite methods

2.1.1 Member Invite (Via Free Email Domain)



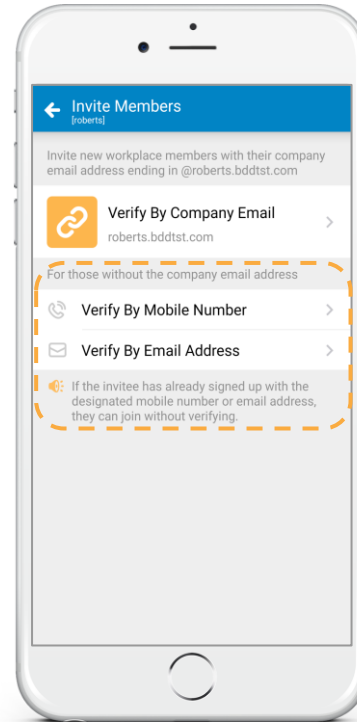
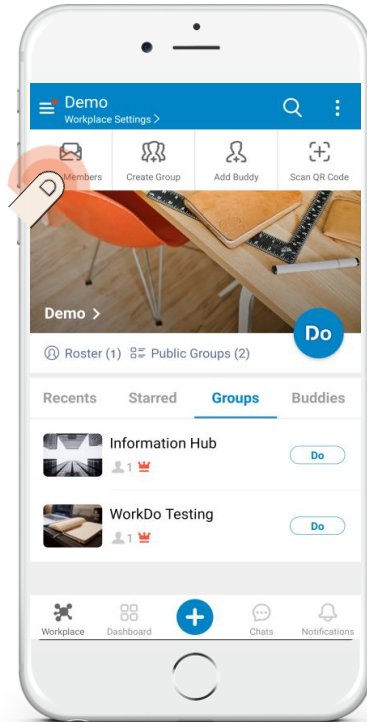
03 Select

04 Click the invite link

2.1.2 Member Invite

- Without Company Email Domain
 - ◉ Generate unique invite Links using email or mobile number.
 - ◉ Joins after verification.

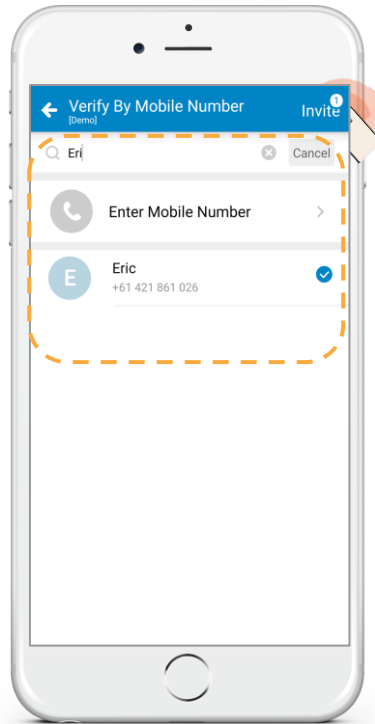
2.1.2 Member Invite (Without Company Email Domain)



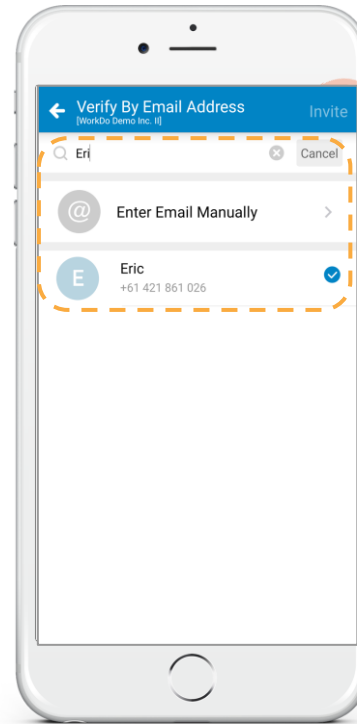
01 Member invite

02 Link generation methods

2.1.2 Member Invite (Without Company Email Domain)



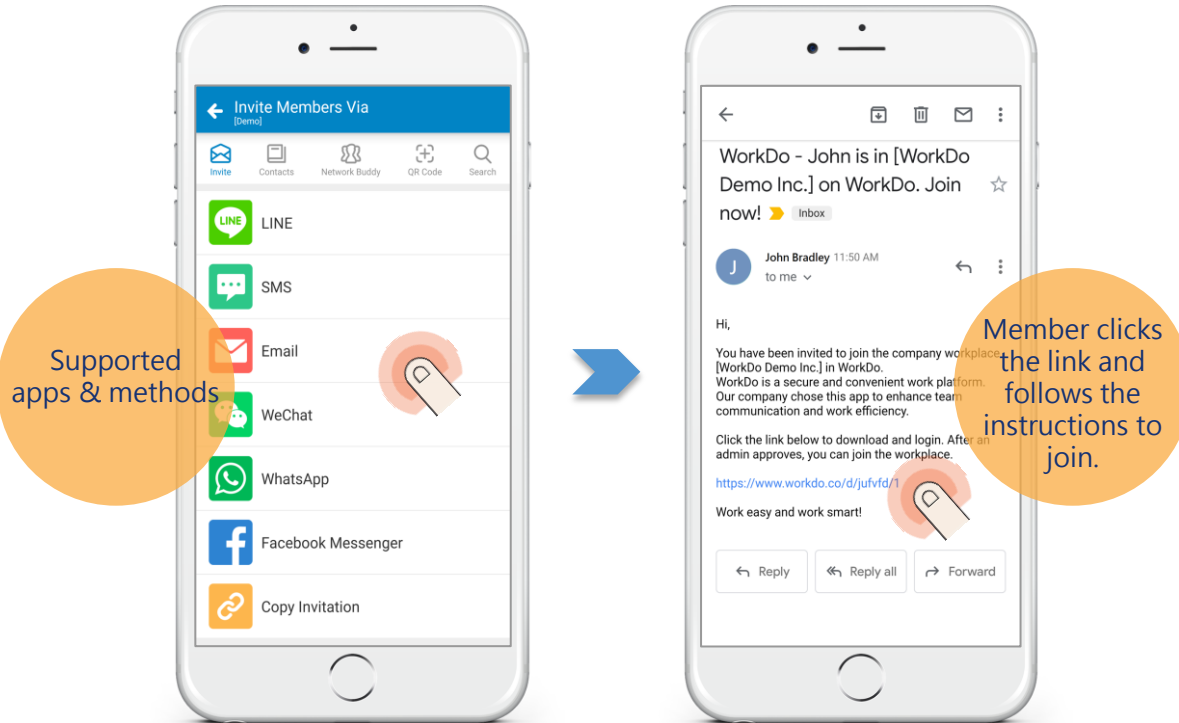
OR



03_a Verify by mobile number

03_b Verify by email address

2.1.2 Member Invite (Without Company Email Domain)



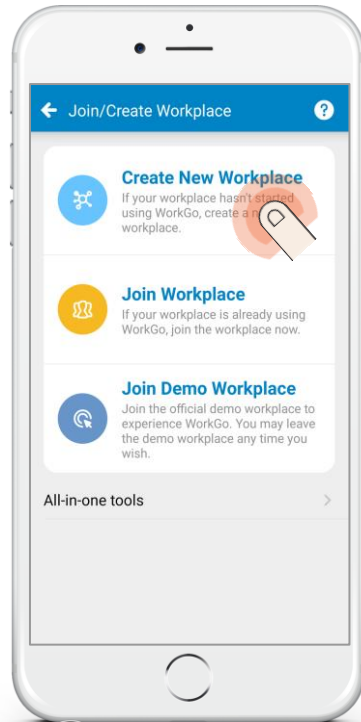
04 Select a method

05 Click the invite link

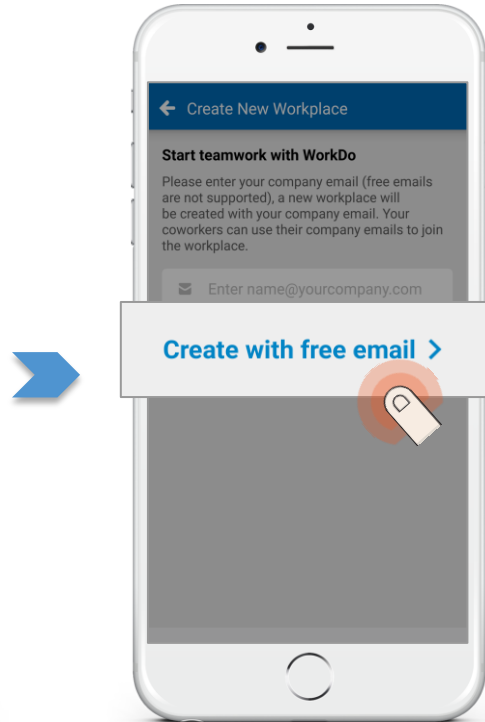
2.2 Create Workplace (Free Email Domain)

- ◉ Target invite members.
- ◉ Admin verifies for added security.

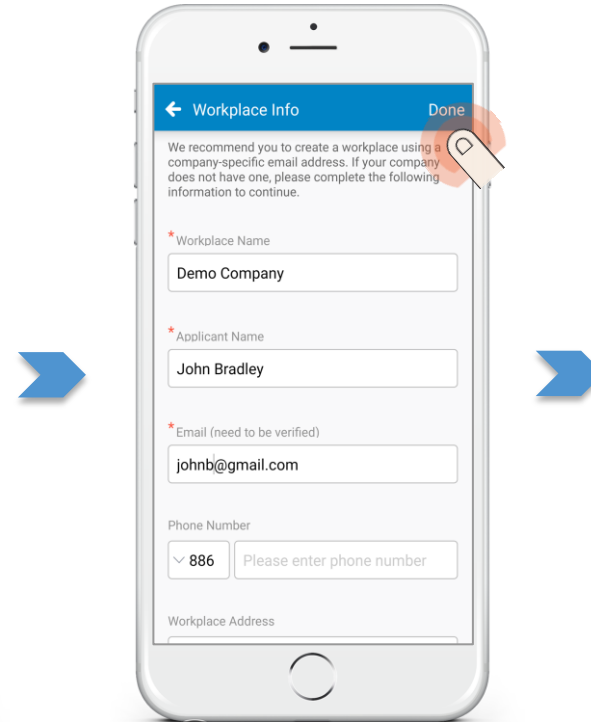
2.2 Create Workplace via Free Email Domain



01 Create workplace

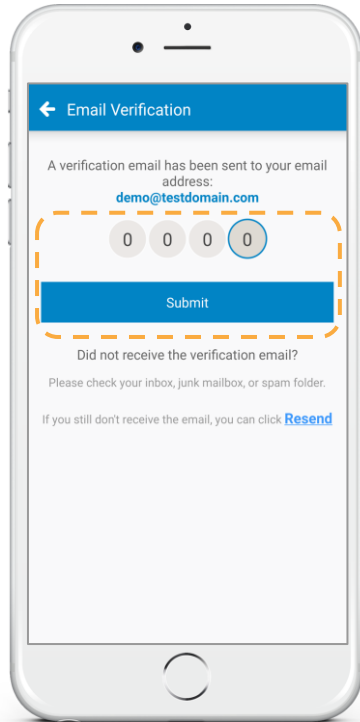


02 Create with free email

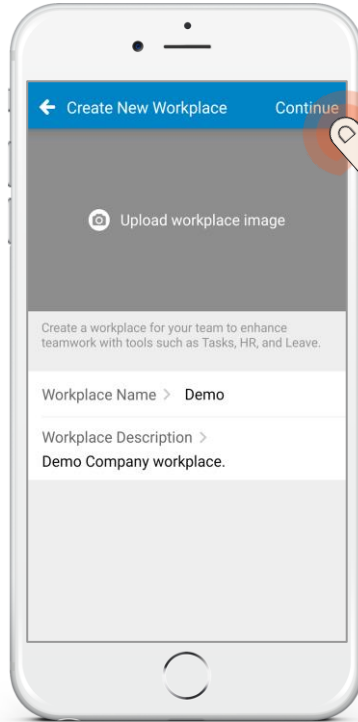


03 Input information

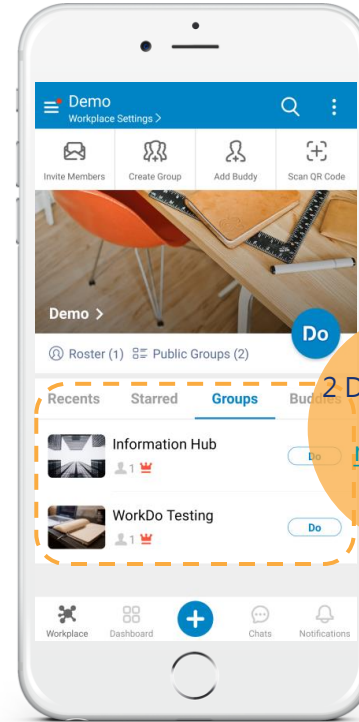
2.2 Create Workplace via Free Email Domain



04 Input verification code



05 Workplace info fill out



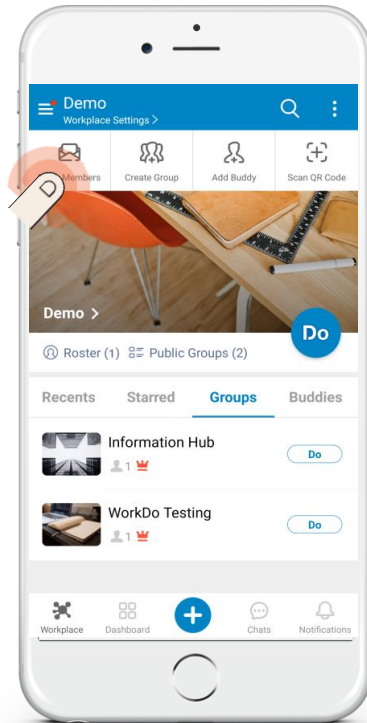
06 Workplace home screen

2 Default groups can be renamed or deleted

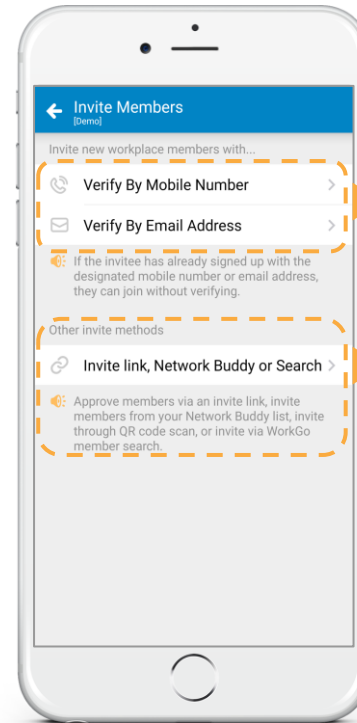
2.2.1 Member Invite

- ◉ Generate unique invite links via emails or mobile numbers.
- ◉ Use generic invite link with admin approval required.

2.2.1 Member Invite (Via Free Email Domain)



01 Member invite



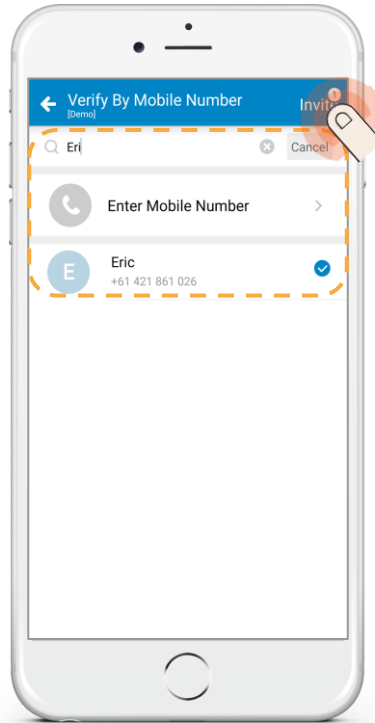
02 Link generation methods

Generates
unique invite
links

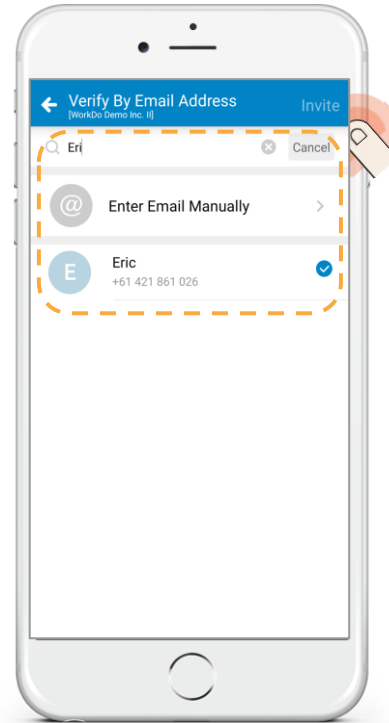
Generic invite
link with admin
approval
required



2.2.1 Member Invite (Via Free Email Domain)



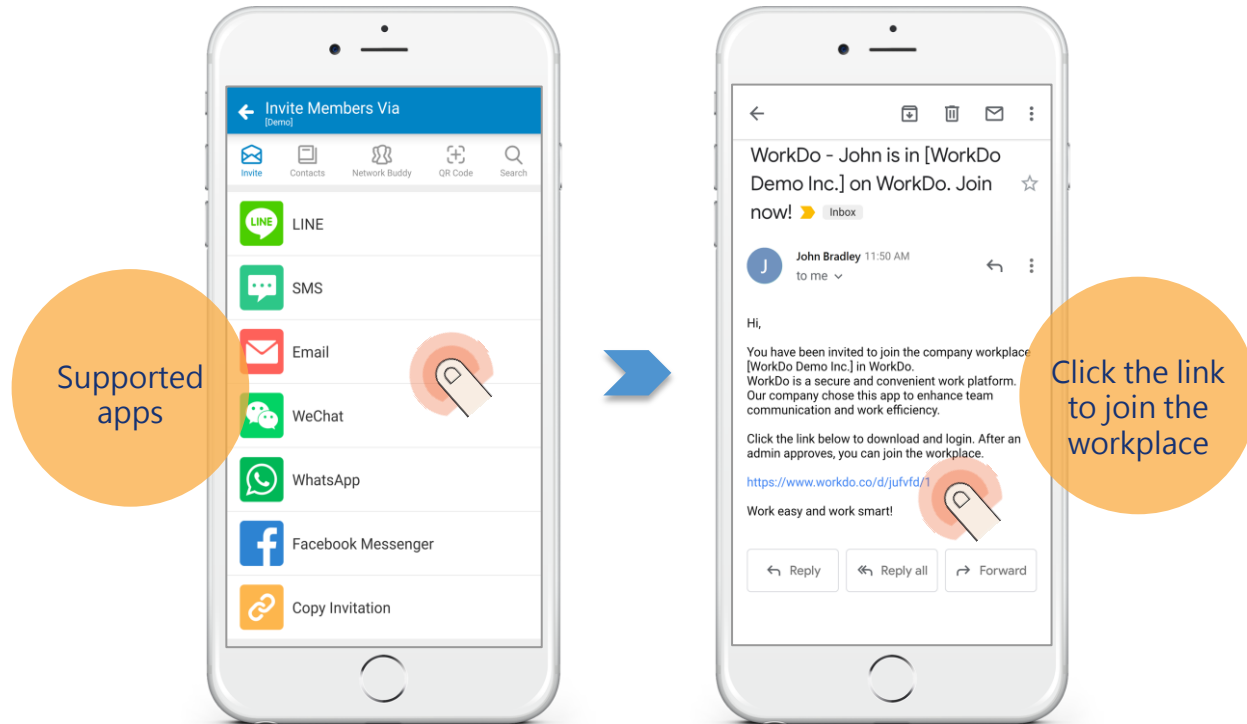
or



03a Mobile Number

03b Email

2.2.1 Member Invite (Via Free Email Domain)



04 Method select

05 Click invite link

3. Join Workplace

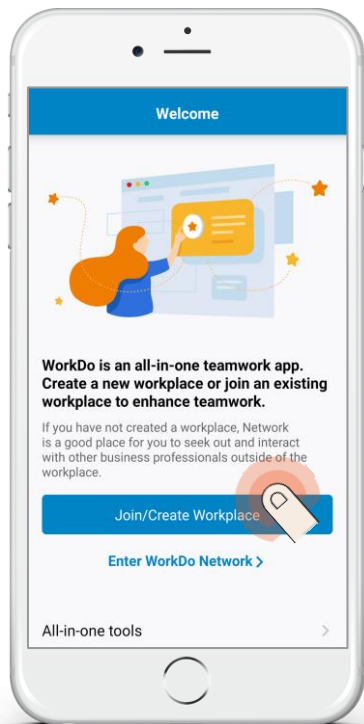
3.1 [Guided Sign Up](#)

3.2 [Self Sign Up](#)

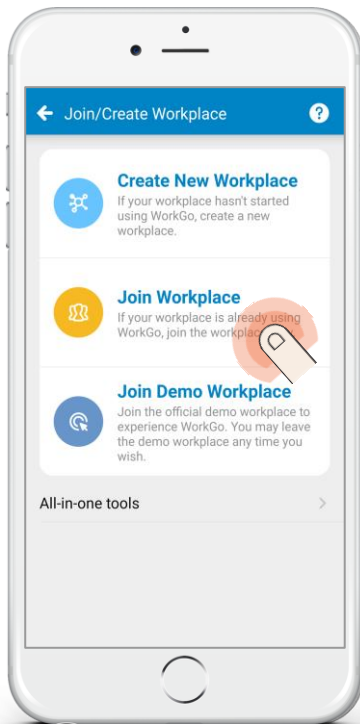
3.1 Guided Sign Up

Workplace Set with Company Email Domain
User has a Company Email

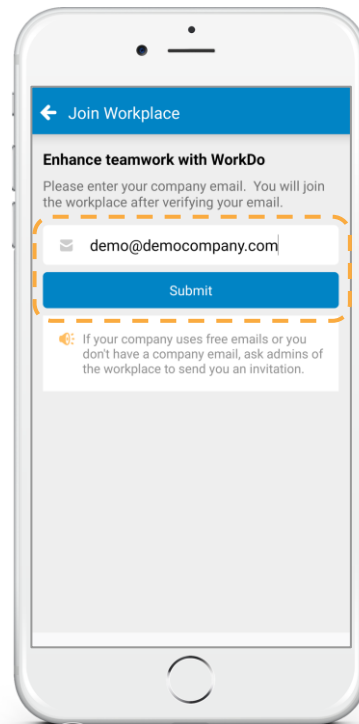
3.1 Guided Sign Up



01 Join/create workplace

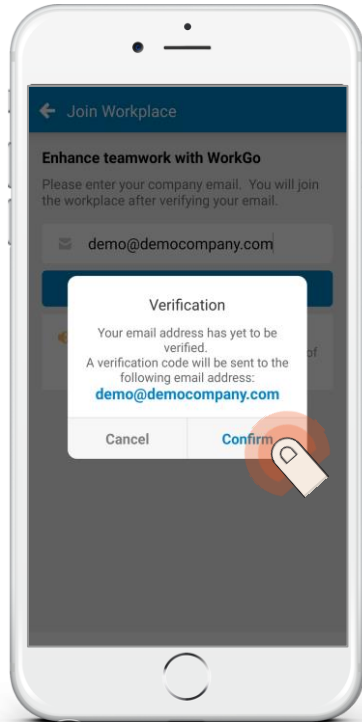


02 Join a new workplace

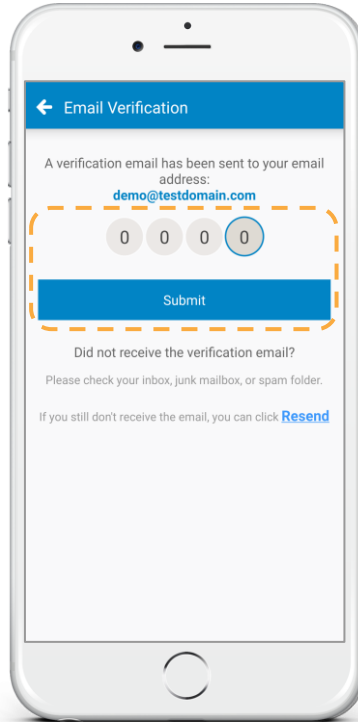


03 Fill out company email

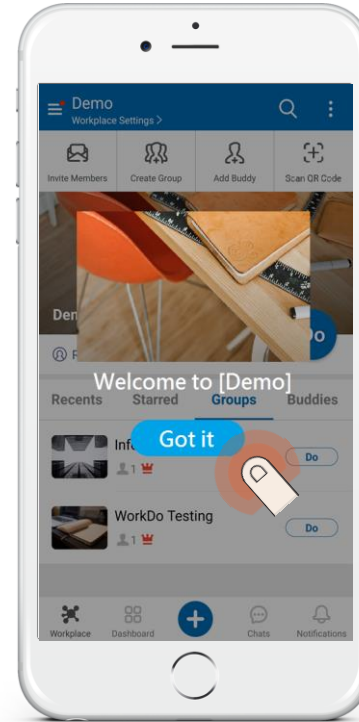
3.1 Guided Sign Up



04 Email confirmation



05 Enter verification code



06 Join workplace

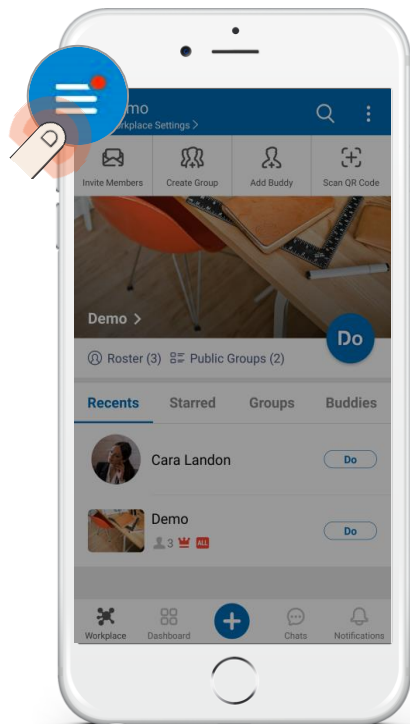
3.2 Self Sign Up

Join Other Workplaces

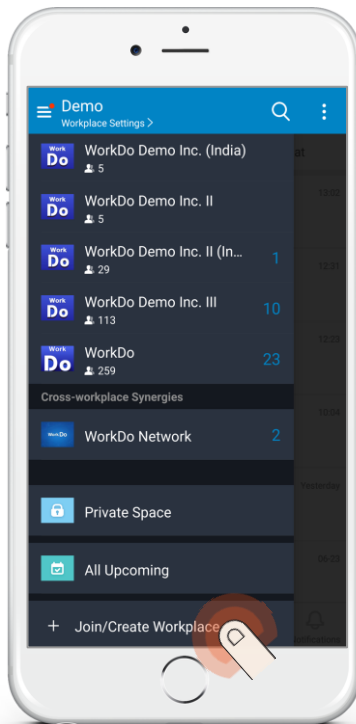
Workplace Set with Company Email Domain

User has a Company Email

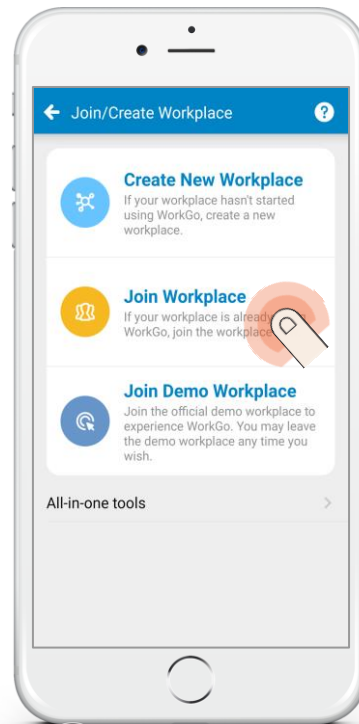
3.2 Self Sign Up



01 Workplace list

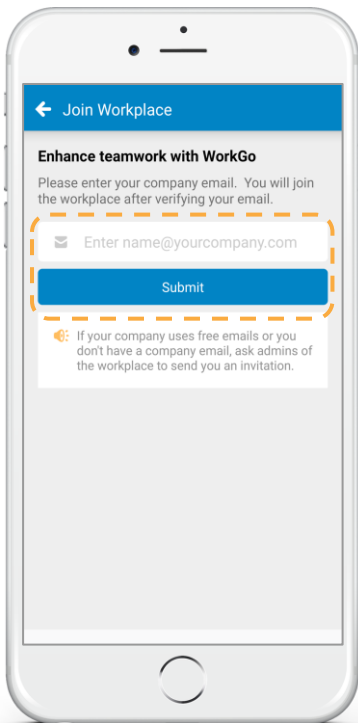


02 Join/create workplace

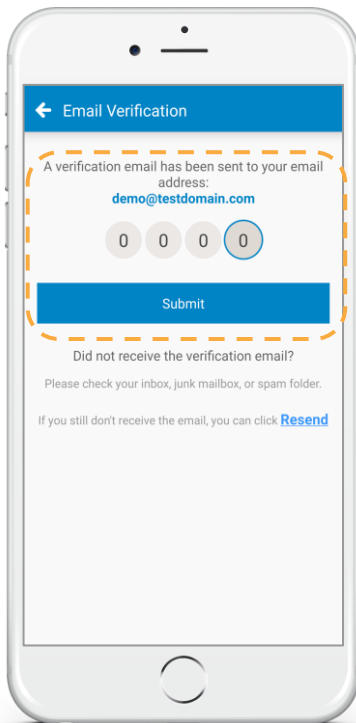


03 Join workplace

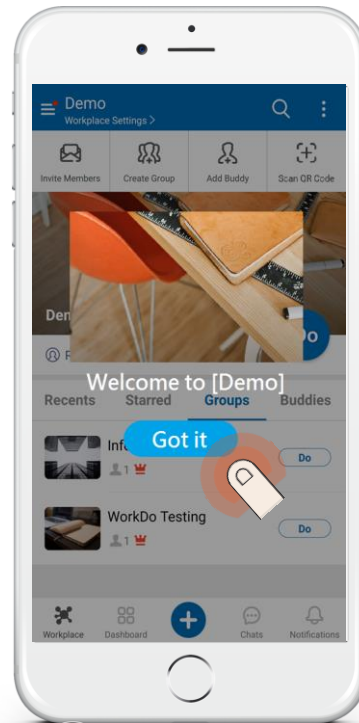
3.2 Self Sign Up



04 Enter email



05 Enter verification code



06 Join workplace

4. Create Groups

4.1 [Create Groups](#)

4.1.1 [Groups – Add Members](#)

4.1.2 [Join Groups](#)

4.2 [Default Groups](#)

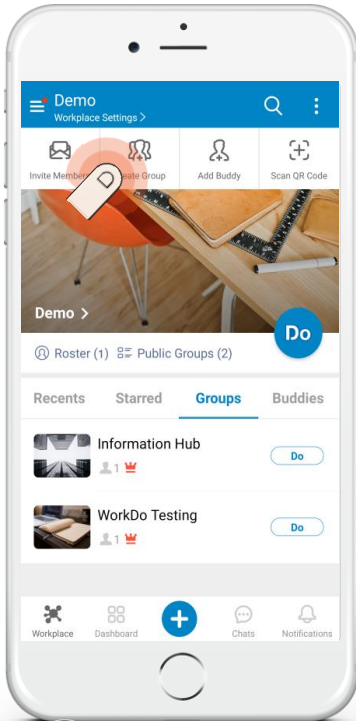
4.3 [Buddy Chat](#)

4.4 [Tip: Set Favorites](#)

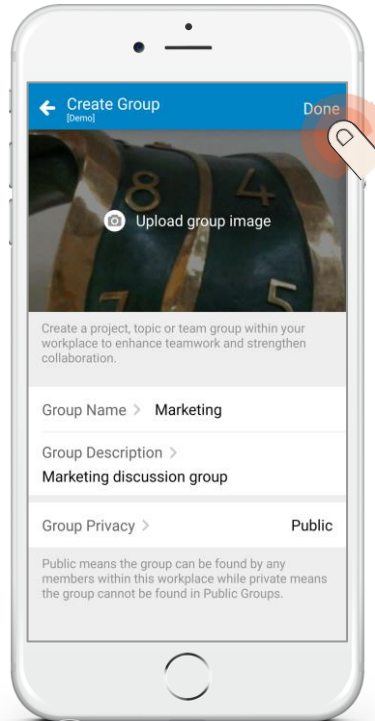
4.1 Create Groups

- ◉ Create dedicated groups for different departments, topics, tasks, etc. for improved collaboration.

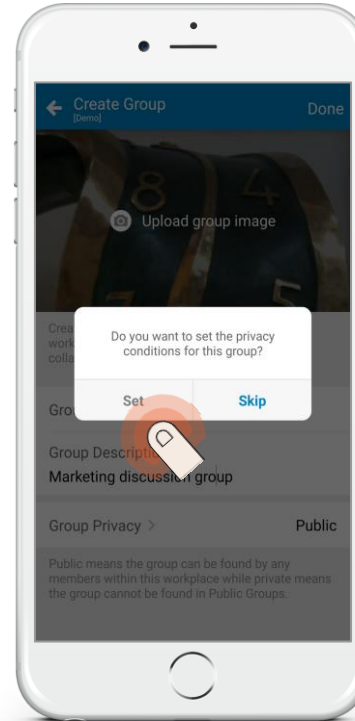
4.1 Create Groups



01 Workplace > create group

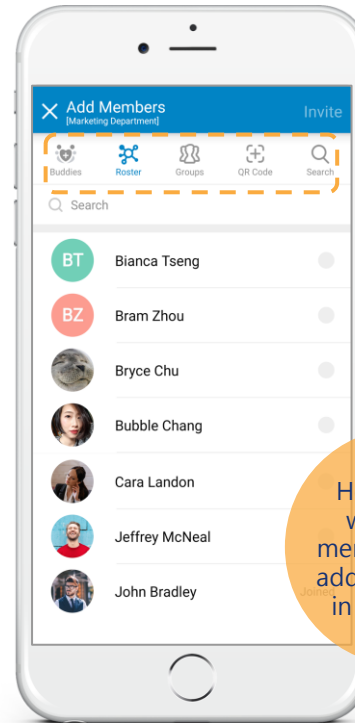
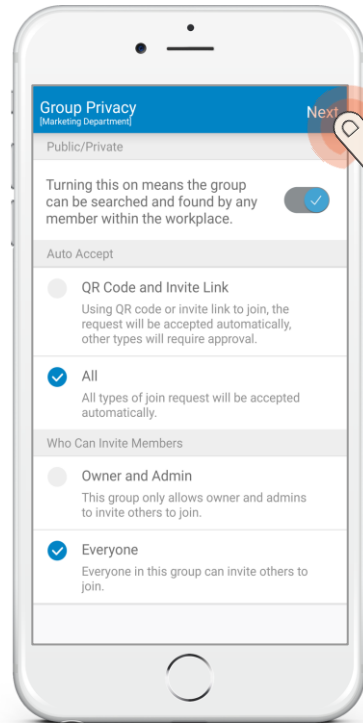


02 Group info > done



03 Privacy settings

4.1 Create Groups



Here lists all workplace members, once added, they are in the group.

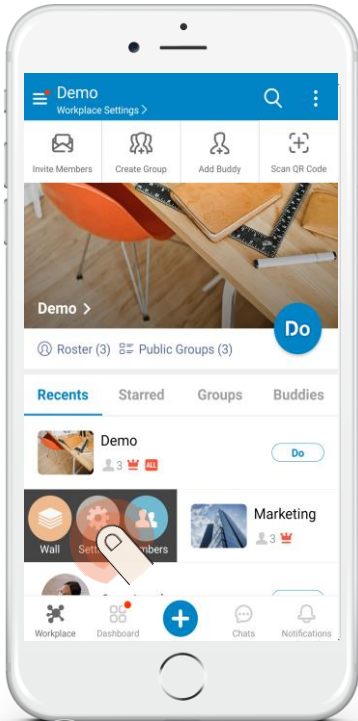
04 Privacy settings > next

05 Add member methods

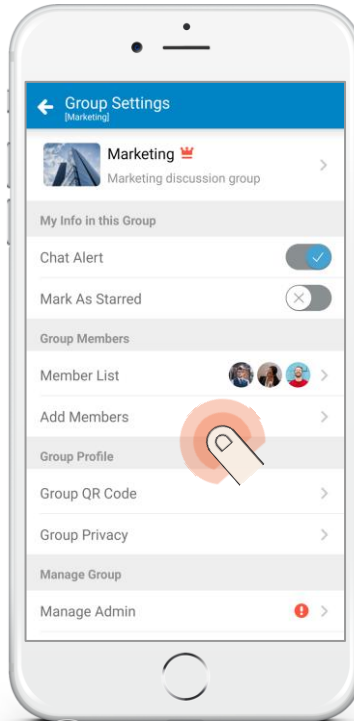
4.1.1 Groups – Add Members

Effective Group Conversations with a Focus.

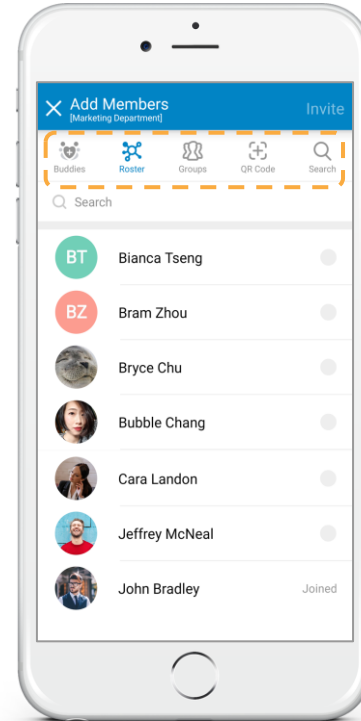
4.1.1 Groups – Add Members



01 Workplace >
right swipe > settings



02 Add members

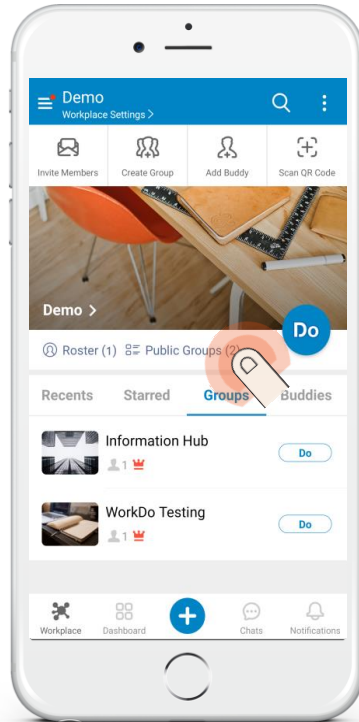


03 Add member methods

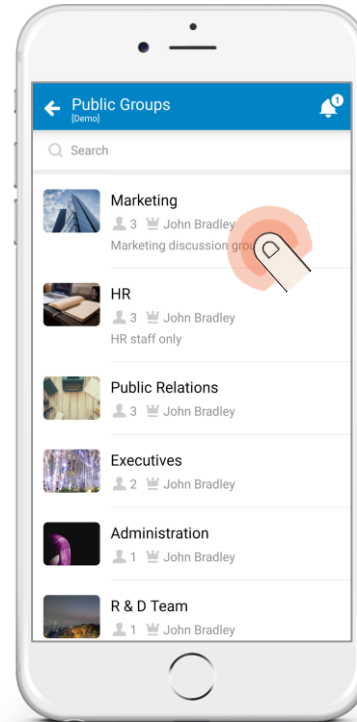
4.1.2 Join Groups

Small-Group Collaboration for Enhanced teamwork!

4.1.2 Join Groups

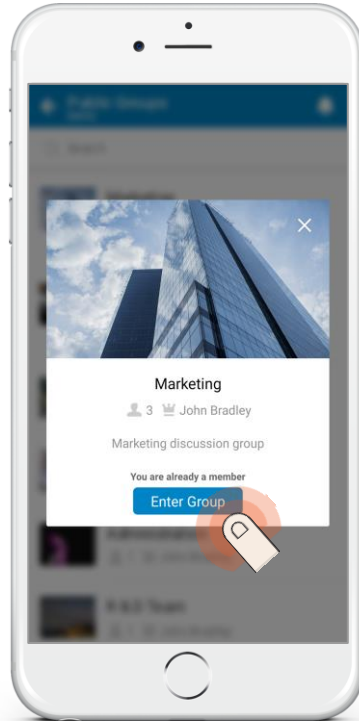


01 Workplace > public groups



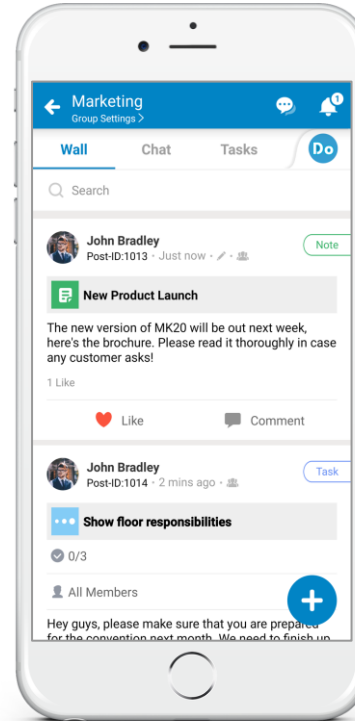
02 Select groups to join

4.1.2 Join Groups



03

Join



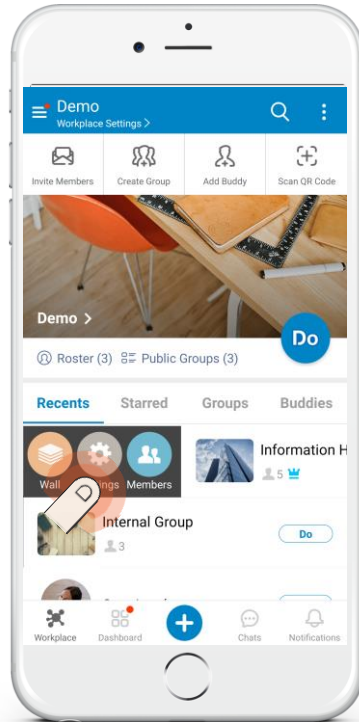
04

Group wall for recent activities

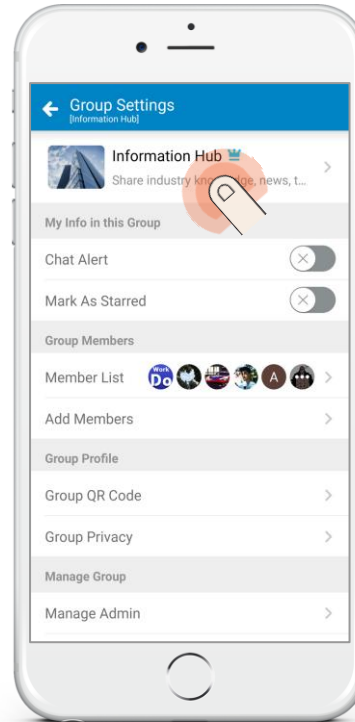
4.2 Default Groups

- - ◉ Use the two default groups for company-wide discussion, announcements or change them to use any way you deem fit.

4.2 Utilize the Default Groups

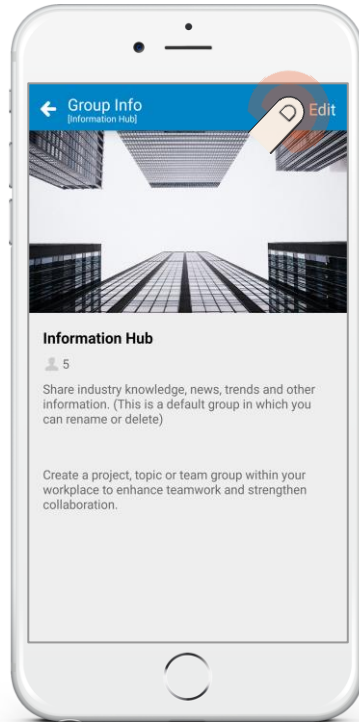


01 Workplace > right swipe
> Settings

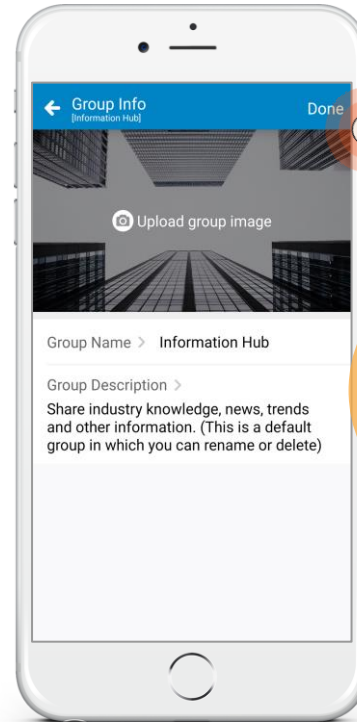


02 Change group name

4.2 Utilize the Default Groups



03 Edit



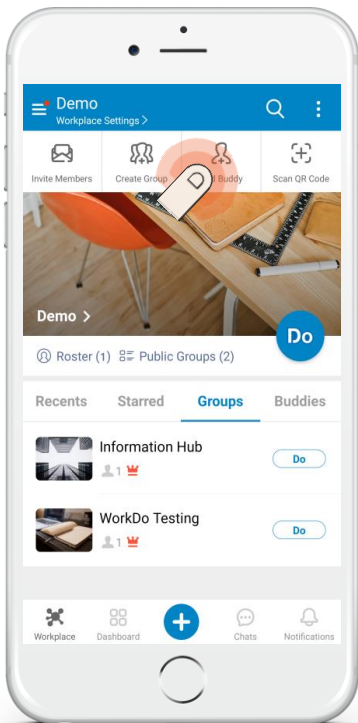
04 Complete

The option to delete the group can be found in the Settings > Advanced

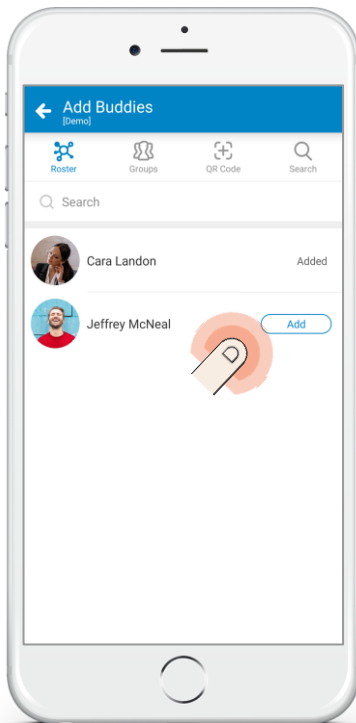
4.3 Buddy Chat

- ◉ Add buddies for a more focused one-on-one communication.

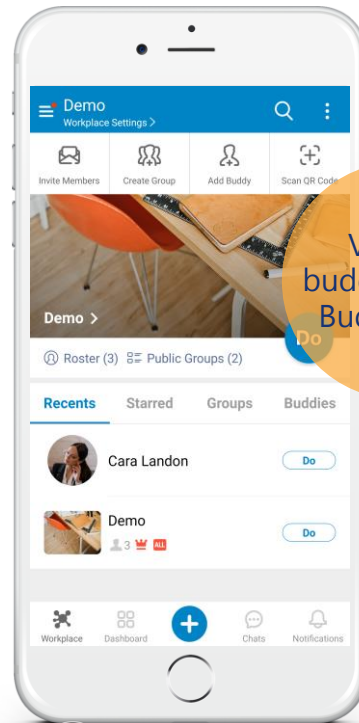
4.3 Buddy Chat: Add Buddies



01 Add buddies



02 Member select



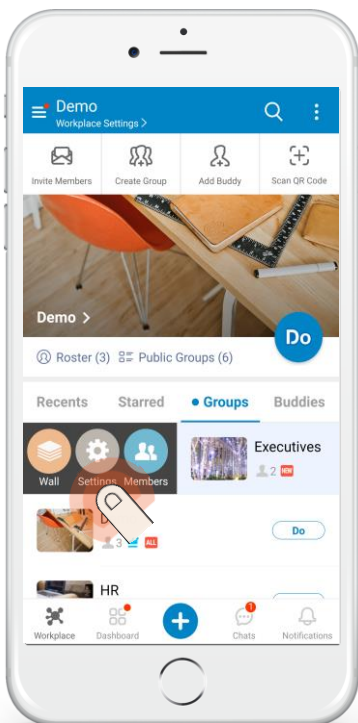
03 New buddy added

View all
buddies in the
Buddies List

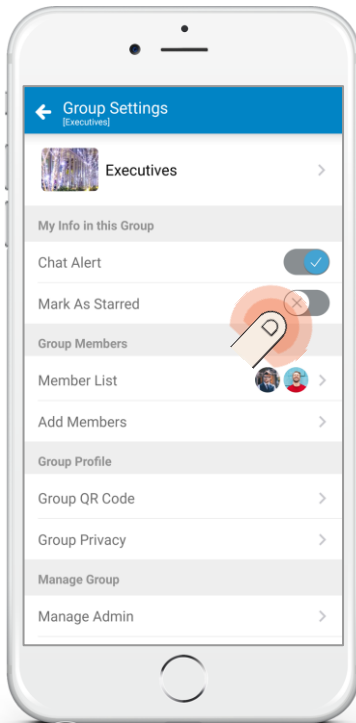
4.4 Tip: Set Favorites

- ◉ Set your favorite buddies and groups.

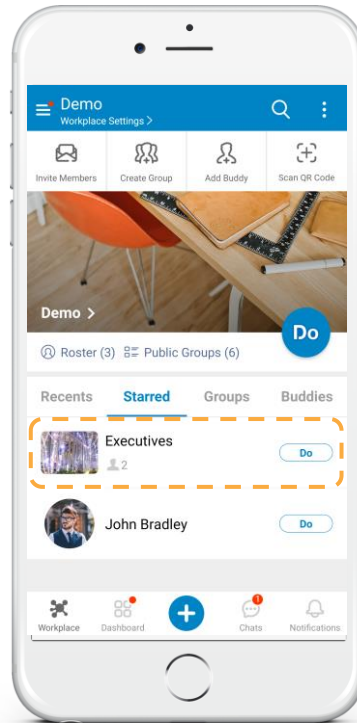
4.4 Tip: Set Favorites



01 Workplace > right swipe
> Settings

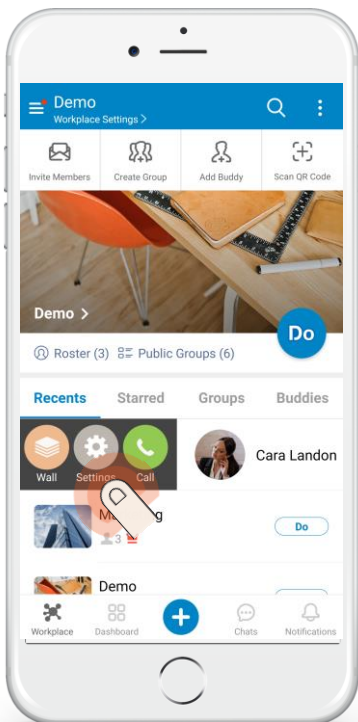


02 Mark as starred

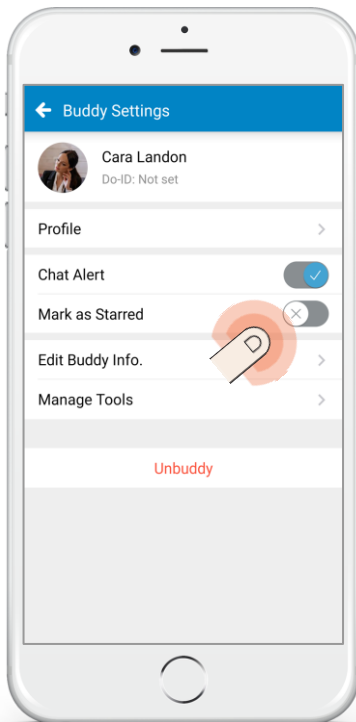


03 View starred list

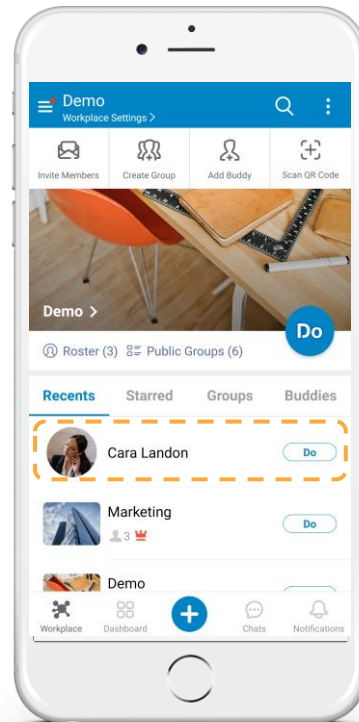
4.4 Tip: Set Favorites



01 Right Swipe > Buddy Settings



02 Mark as Starred



03 View Starred List

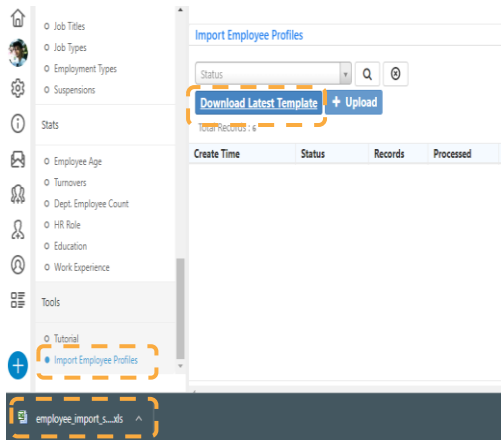
5. Organization Structure

5.1 [Employee Info Import](#)

5.1 Organization Structure : Employee Info Import

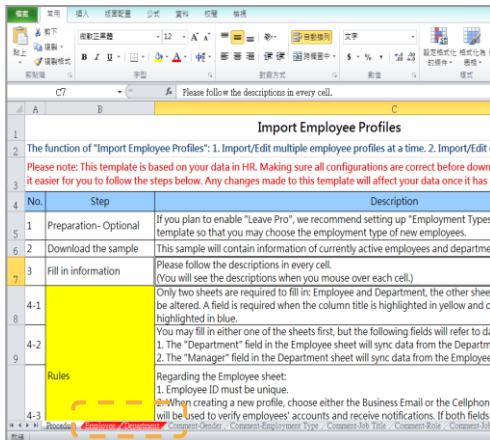
01

Import Employee Profiles >
Download Latest Template



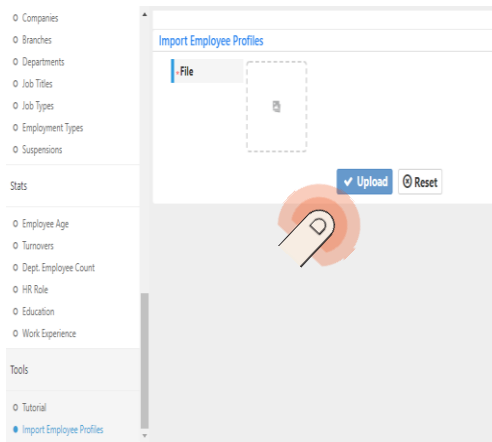
02

Fill out Employee &
Department tabs then save



03

File upload



5.1 Organization Structure : Employee Info Import

04

Verify failed records = 0

Uploaded Employee Profiles

Status Pending | Records 5 | Processed 5 | Failed 0
Skipped 0 | File | Create Time 2020-07-03 14:25

employee_import_simple_sample_en.xls

Employee Department

Skip Import Cancel Skip

	Error Message	Employee ID	Name	Department Name	Business Email	Cellphone No.	Employee Status
<input type="checkbox"/>			Delores	Executive		+8869987654321	Active
<input type="checkbox"/>			Wayne	Public Relations		+8869987654321	Active
<input type="checkbox"/>			Joyce	Human Resources		+8869987654321	Active
<input type="checkbox"/>			Rick	Research & Development		+8869987654321	Active
<input type="checkbox"/>			Eron	Marketing			Active



05

Import and you are done!

Employee Department

Skip Import Cancel Skip

	Error Message	Employee ID	Name	Department Name	Business Email
<input type="checkbox"/>			Delores	Executive	
<input type="checkbox"/>			Wayne	Public Relations	
<input type="checkbox"/>			Joyce	Human Resources	
<input type="checkbox"/>			Rick	Research & Development	
<input type="checkbox"/>			Eron	Marketing	

Import

Click [here](#) for detailed instructions

6. Settings

6.1 [Add Admins](#)

6.2 [Privacy Settings](#)

6.3 [Tool Dependency](#)

6.4 [Tool Activation & Tool Roles](#)

6.5 [User Guide Download](#)

6.1 Add Admins

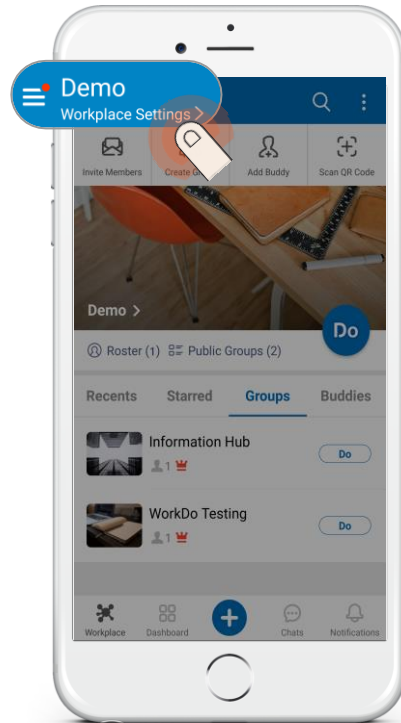
- ◉ Workplace/group admins = owner + admins
- ◉ Owner & admins are responsible for all the settings.
- ◉ Only the owner is allowed to change ownership and group deletion.

6.1 Admin Permissions



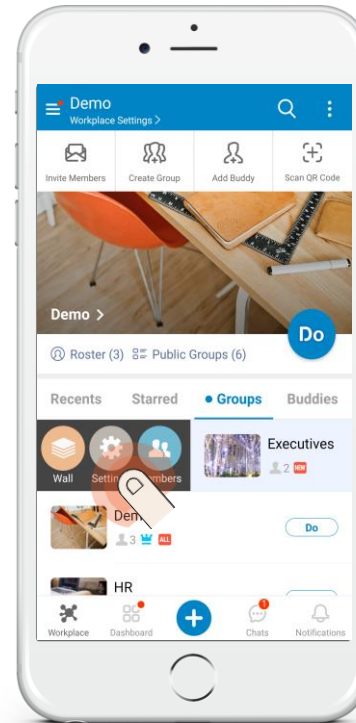
Permission	Workplace/Group Owner	Workplace/Group Admin	Tool Admin
Delete Workplace/Group	●		
Ownership Transfer	●		
Maintain Settings	●	●	
Tool Activations	●	●	
Member Role Change	●	●	
Maintain Tool Data			●

6.1 Add Admins to Manage the Workplace/Group



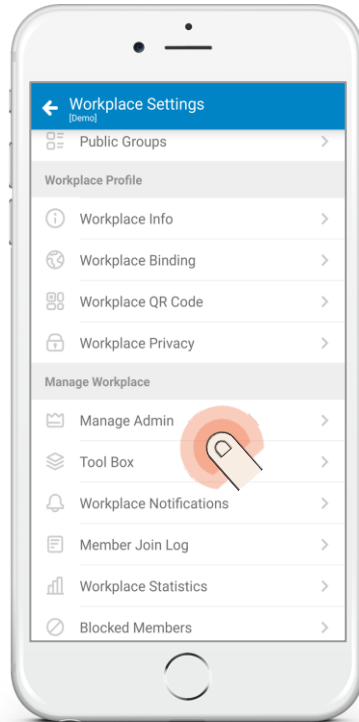
01_a Workplace Settings

Workplace and
group share the
same following
steps

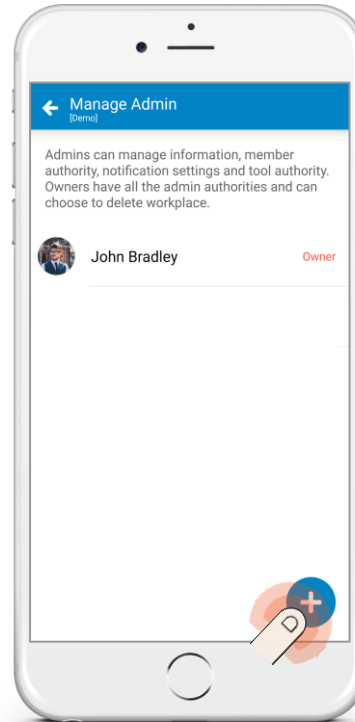


01_b Right swipe > Group Settings

6.1 Add Admins to Manage the Workplace/Group



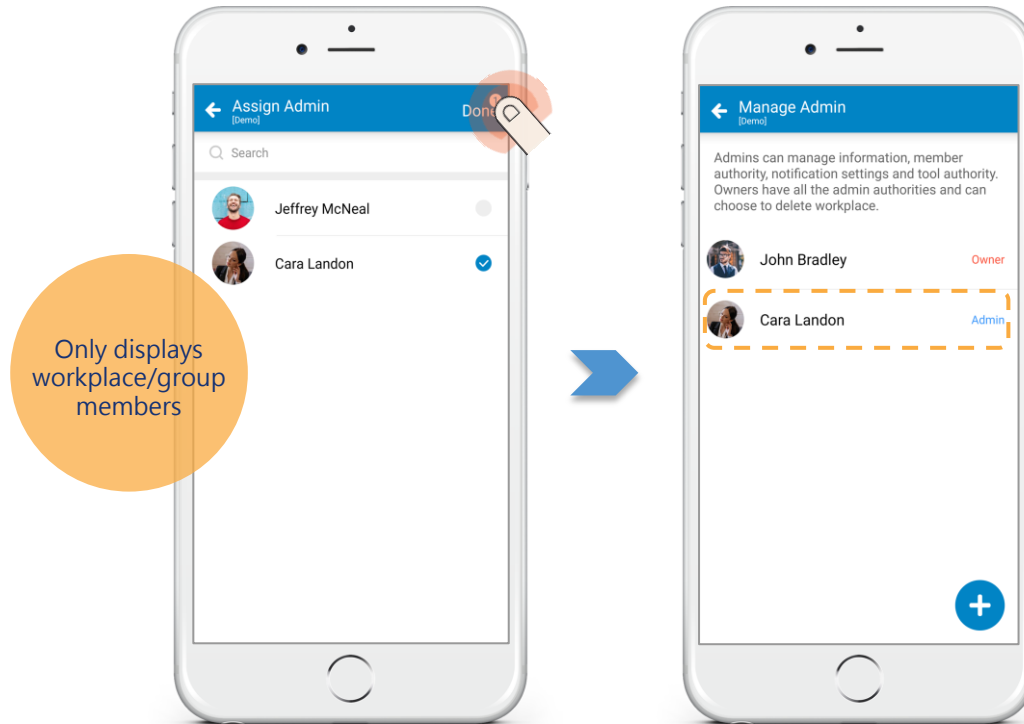
02 Manage Admin



03 Assign



6.1 Add Admins to Manage the Workplace/Group



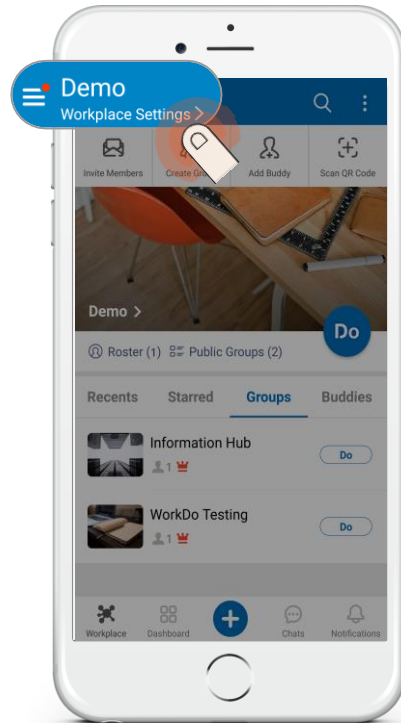
04 Member select

05 Complete!

6.2 Privacy Settings

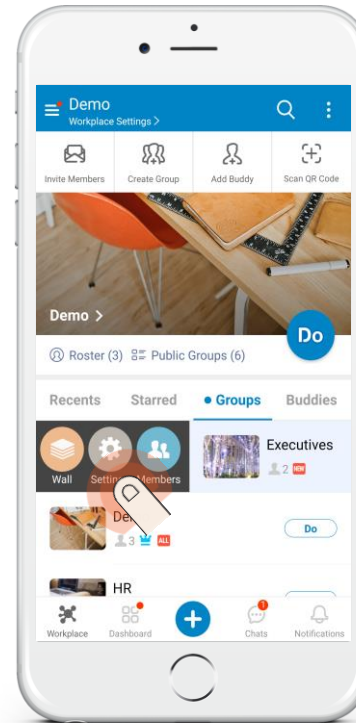
- ◉ Available for Workplace/Group.
- ◉ Read Carefully Before Changing the Settings.

6.2 Change Privacy Settings



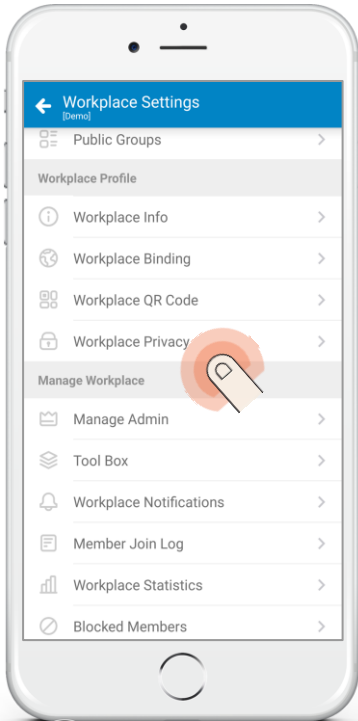
01_a Workplace Settings

Different privacy settings for Workplace/group

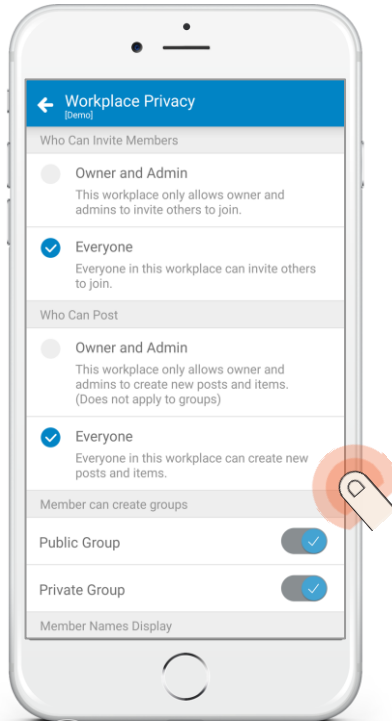


01_b Right Swipe > Group Settings

6.2 Change Privacy Settings

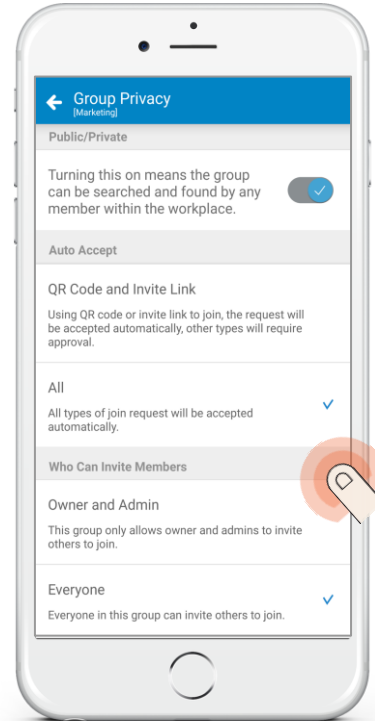


02 Privacy



03a Workplace Privacy Settings

OR



03b Group Privacy Settings

6.3 Tool Dependency

Dedicated Tools for Workplace / Group / Buddies

Different Levels, Different Tools

Improved Workflow Achieved with Tool Binding

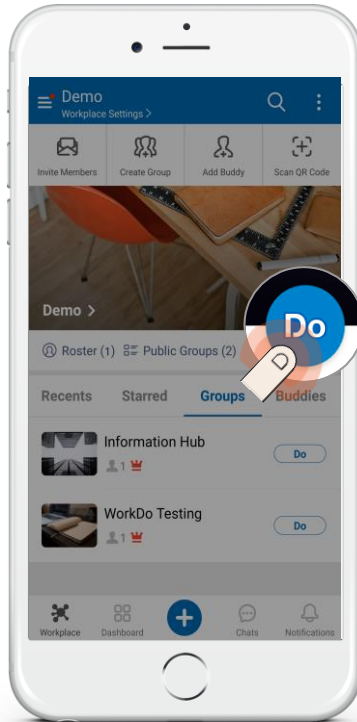
6.3 Tools at Each Level

Advanced Tool	Workplace	Groups	Buddies	Dependency
HR	●			
Payroll	●			HR Dependent
Attendance / Check In	●			HR Dependent
Leave / Leave Pro	●			HR Dependent
Overtime	●			HR Dependent
Expenses	●			HR Dependent
Approvals	●			HR Dependent
Shifts	●			
CRM / Conf. Rm	●			
Phonebook / Cashbook	●	●	●	
We Buy / IOU	●	●		

6.4 Tool Activation & Tool Roles

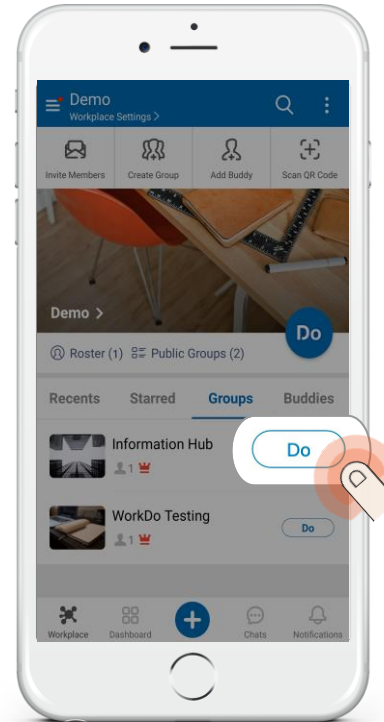
Different Tool Roles (Authorizations) for Different Members
Compartmentalized Information Management

6.4 Tool Activation & Tool Role Change



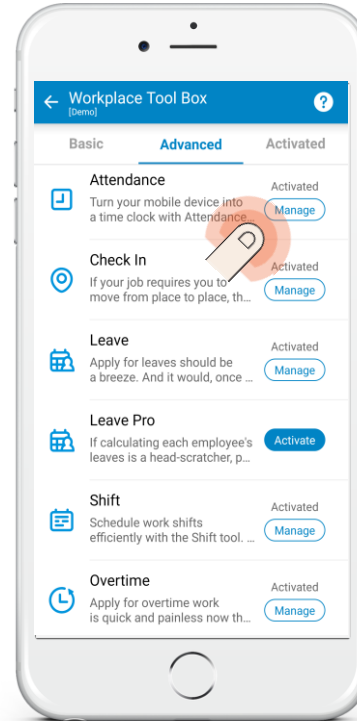
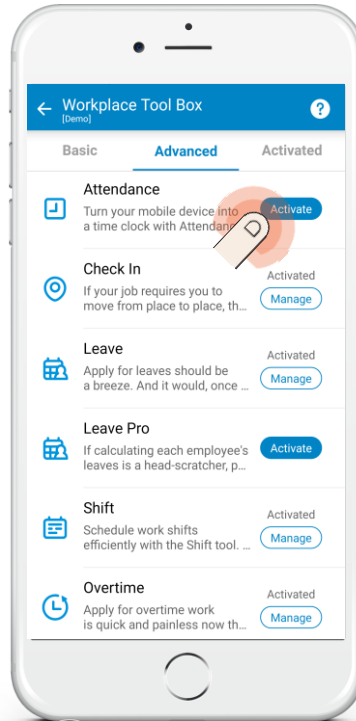
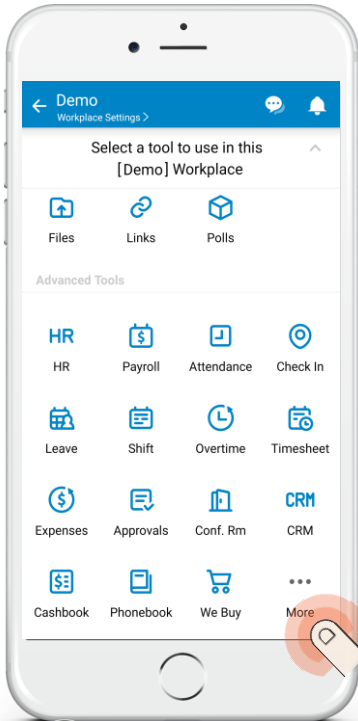
01_a Workplace > Do

There is a tool
box for workplace,
groups, buddies

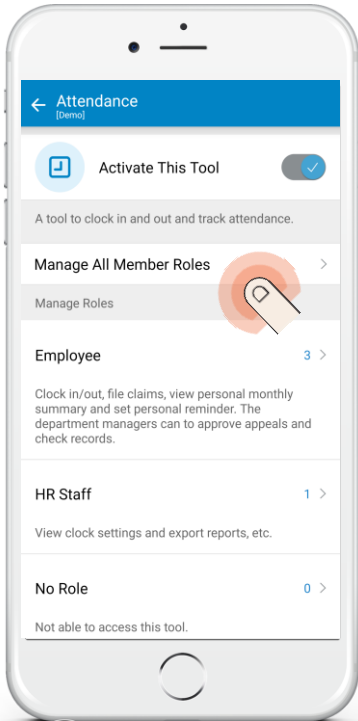


01_b Workplace > Groups /
Buddies > Do

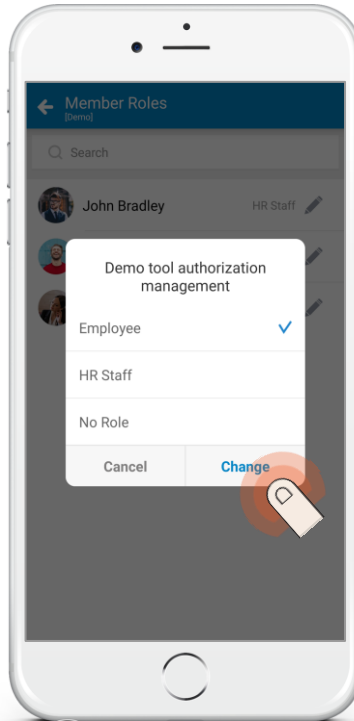
6.4 Tool Activation & Tool Role Change



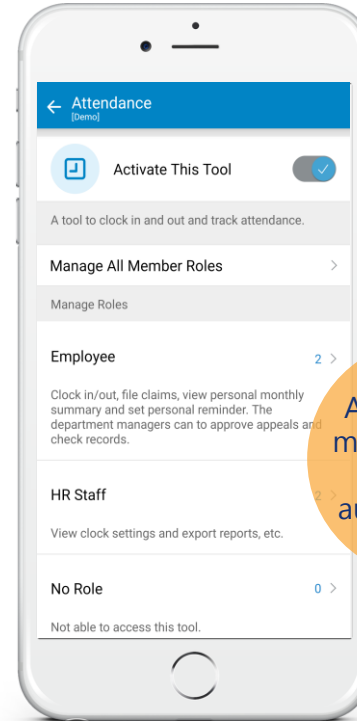
6.4 Tool Activation & Tool Role Change



05 Manage All
Member Roles



06 Select a New Role >
Change



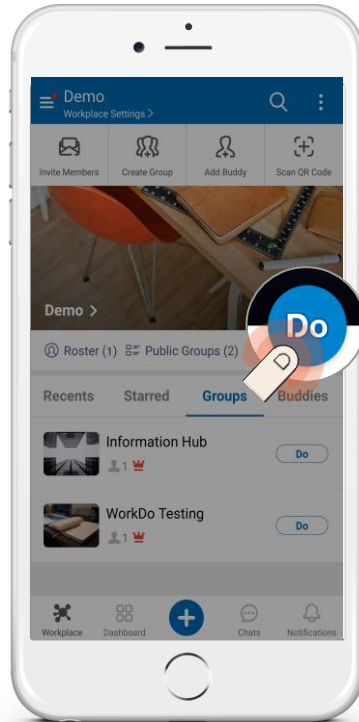
07 Done!

A list view of
members with
each
authorization

6.5 User Guide Download

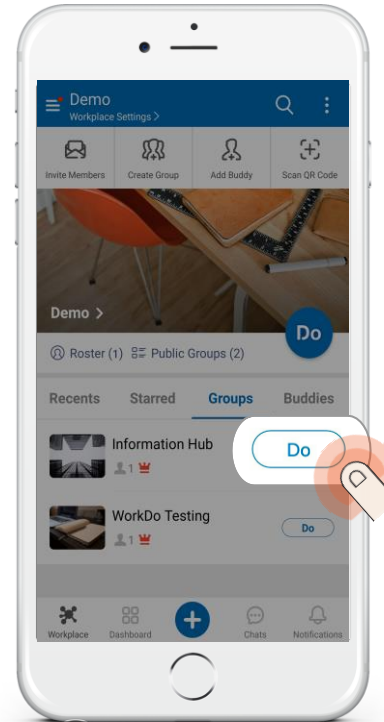
The User Guides Contain Everything You Need to Know!

6.5 User Guide Download



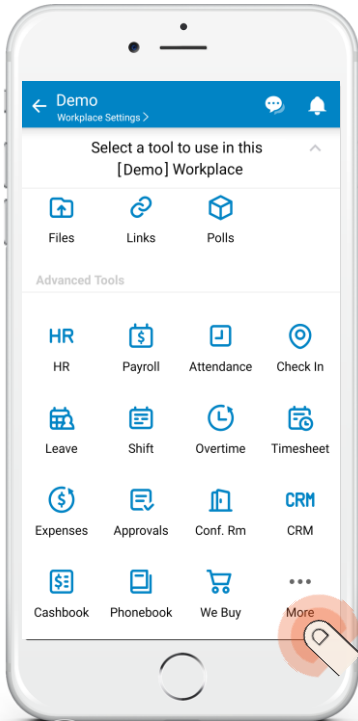
01_a Workplace > Do

Same rule
applies to the
workplace,
groups &
buddies

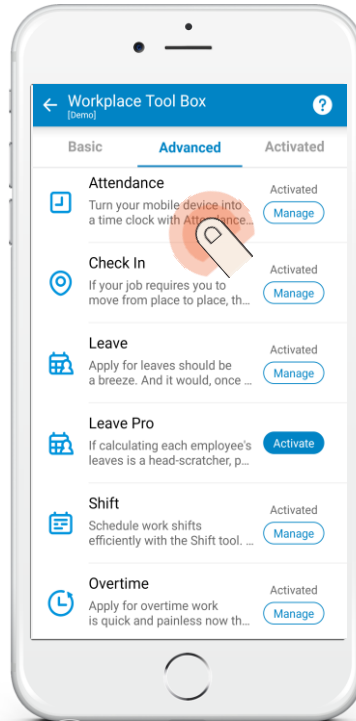


01_b Workplace > Groups /
Buddies > Do

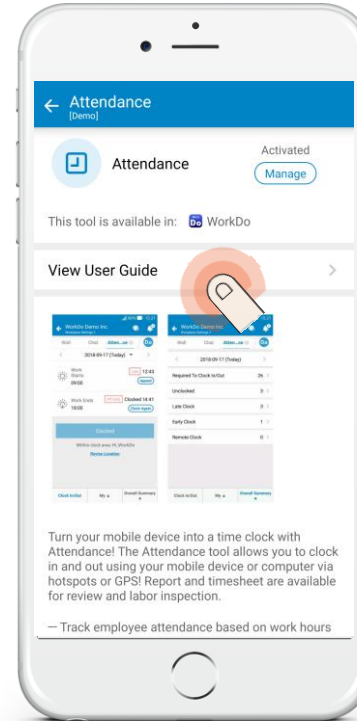
6.5 User Guide Download



02 Workplace Toolbox



03 Select a Tool

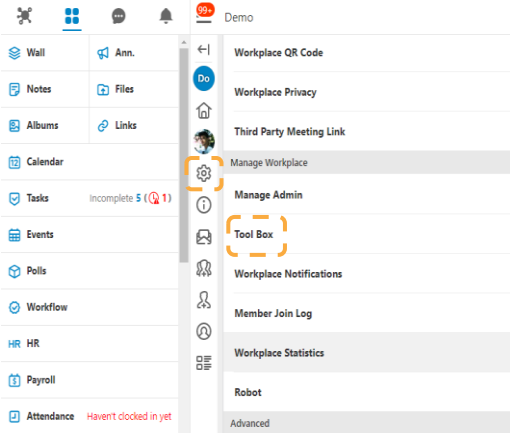


04 View User Guide

6.5 User Guide Download - Web

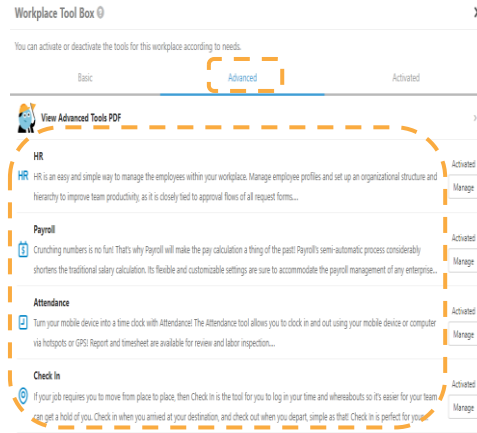
01

Click Workplace Settings > Tool Box



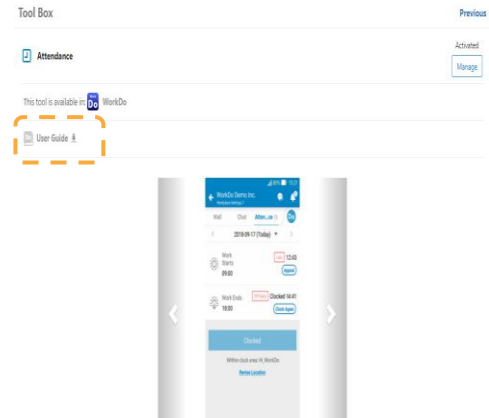
02

Click Advanced Tab > Select a Tool



03

Click User Guide to Begin Download





Click to know more

Set your workplace
in 5 steps

Get to know WorkDo



How to use
the basic tools?

How to set up
the advanced tools?



**Work easy,
Work smart !**



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[WorkDo](#)



[Resource Center](#)