Quick Start - The Basics

Get to know WorkDo!

V171128

The Basics

The Must Knows
- Manage information
- Basic tools
- Advanced tools
- Features
- Main functions

The Workplace
- Create workplace with company email
  - Join workplace - after sign up
  - Join another existing workplace
  - Invite - with company email
  - Invite - no company email
- Create workplace with free email
  - Target invite

The Groups
- Create sub-groups
- Add members to sub-groups
- Join a sub-group
- Tip: use default sub-groups
- One-on-one communication: buddy
- Tip: star groups and buddies

The Settings
- Manage admins
- Activate tools/manage tool roles
- Privacy settings

Let's start to...
- Create items
- View posted items
- Edit, discard, delete and more
- Use My Shelf

WorkDo

WorkDo simplifies how you manage information
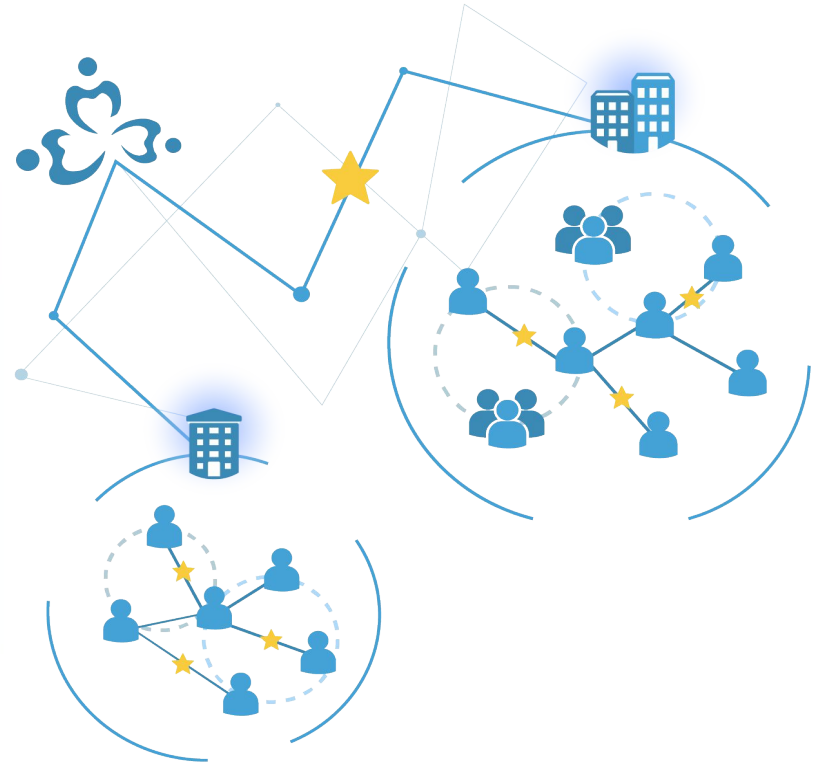
Different levels of management
Must be a member to view, use
and manage information

Manage information

- Participating after joining

- Manage multiple workplaces

- Sub-groups in each workplace

- 1-on-1 teamwork: buddies

- My Shelf

WorkDo

WorkDo basic tools

For workplace/groups/buddies/My Shelf

Tools you can use to enhance teamwork every day

Basic tools

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

WorkDo

Public Notices
Announcements, reminders, industry news, new information, company benefits, policies and more!

Activities
Meetings, company events, annual parties, training, seminars and more! Track who's attending!

Shared Resource
Cloud storage, shared files, upload and download easily.

Notes

Tasks

Events

Albums

Files

Polls

Allocate Jobs
Projects, activity planning, contracts, customer visits, documentation, equipment maintenance and more!

Pictures & Images
Completion proof, equipment images, design blueprints, product samples, architecture designs, venue pictures and more!

Opinions
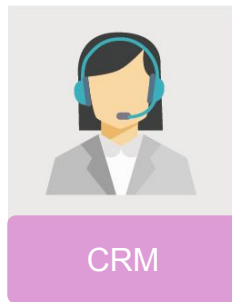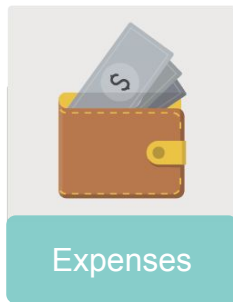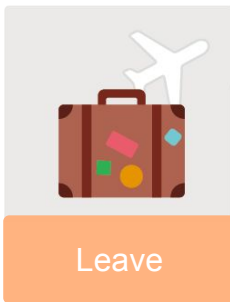Company events, design ideas, project direction, company core value, annual parties and more!

WorkDo

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!

The Tools

HR	Leave	Expenses	CRM	Attendance	Conf. Rm.	Approvals

Phonebook	We Buy	IOU	Cashbook	Training	More
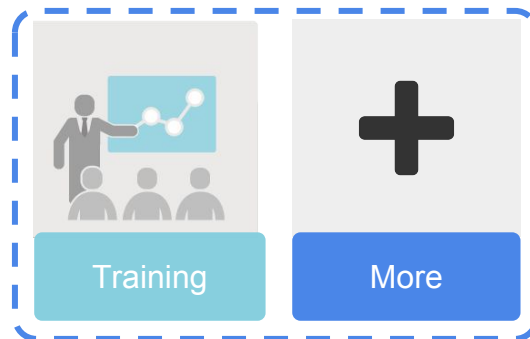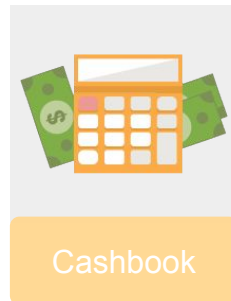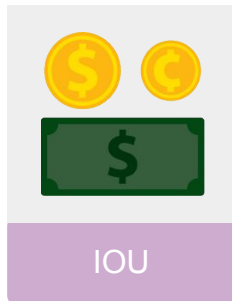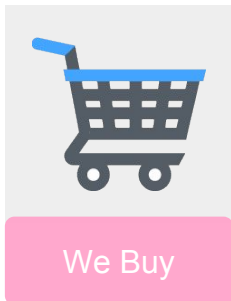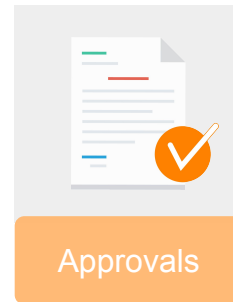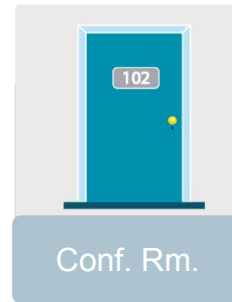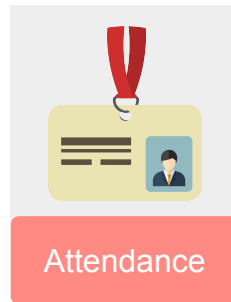
More to come...

WorkDo

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

Check out other <u>WorkDo Features</u>

to see all the different ways to
increase work efficiency

The levels of teamwork

Groups

Invite members
Group settings
Post items
Group tools

Invite

Settings

Workplace

Post items
Buddy tools
Moments

Buddies

Efficiency ↑

Sign Up

Create workplace
Join workplace

Post

Tools

Myself

Dashboard
My Shelf
My Upcoming
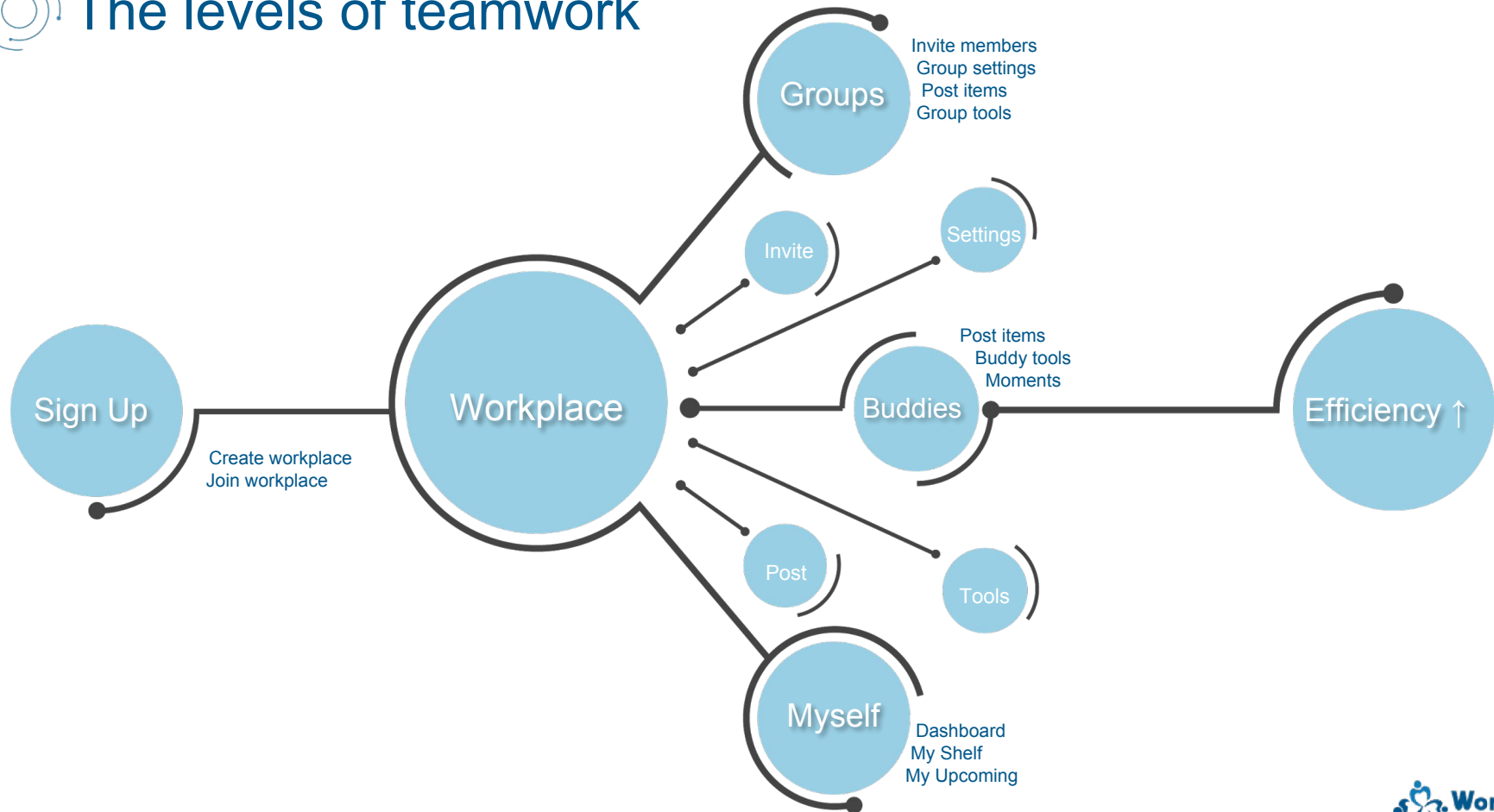
WorkDo

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!

Smarter tools for the whole company

Saves costs

Saves time

Work easy, work smart!

Workplace: start from here

3. Search
Enter keyword to search everything!

4. Notification Center
All notifications related to you

5-1. Workplace Settings
Workplace Info, Privacy, My Info, Manage Admins and more!

2. Where you are now

1. Workplace List
Switch workplaces plus create/join workplace

7. Do (tools)
Workplace/group/buddy Do page (tools)

5. Click to enter workplace chatroom

8. Starred/Groups/Buddies
Click to enter group or buddy wall
Swipe to see secret menus

6. Main functions
Click to see the main functions

WorkDo Demo Inc.
Add Buddy
Scan QR Code
Invite Members
Create Group
Workplace Settings

Work
Do

WorkDo Demo Inc. >
Roster (862)   Public Groups (29)   Buddies
Groups
Starred
Employee Welfare
5
Guitar Club
6
More
Chats
Dashboard
Workplace

WorkDo

Dashboard: everything across groups and buddies
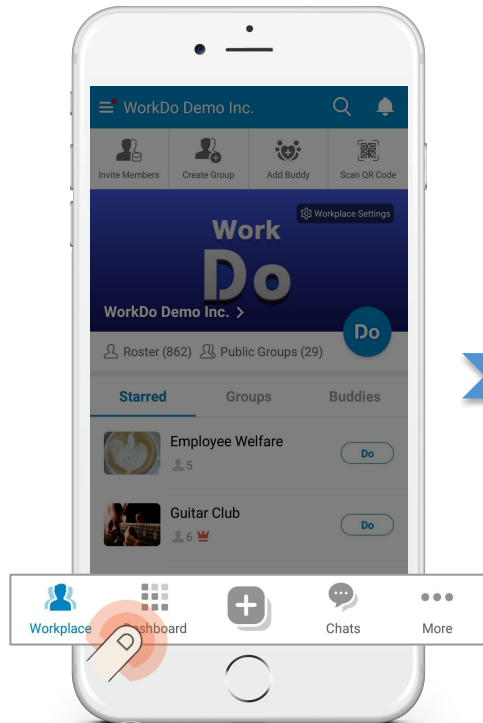
01 _____ Dashboard
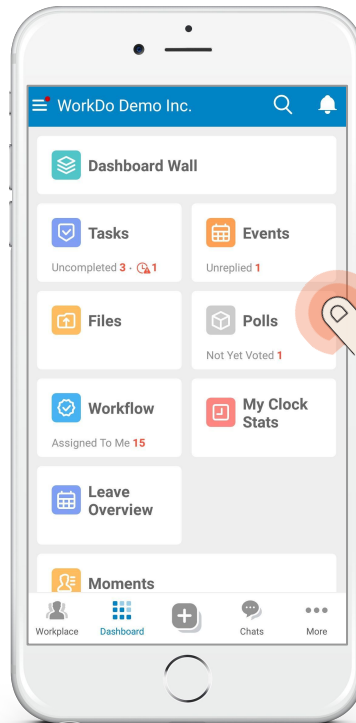
02 _____ Your items
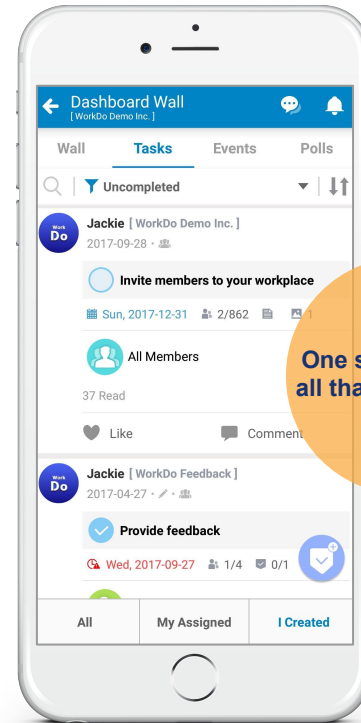
03 _____ Check quickly

One stop shop for all that needs to be done

WorkDo

+: quick access to create new items and requests
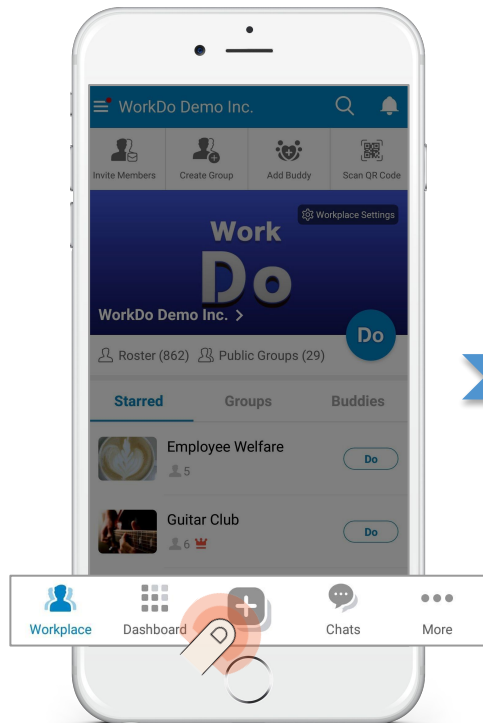
01 _____ +
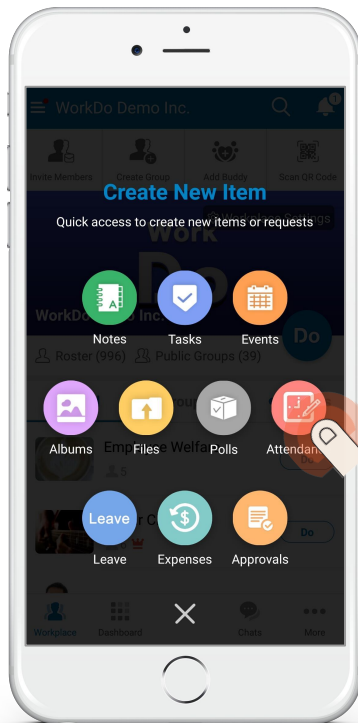
02 _____ Choose tool
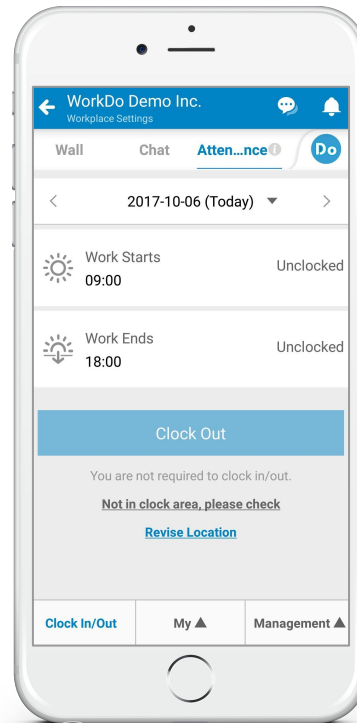
03 _____ Enter create page

Chats: instant messaging
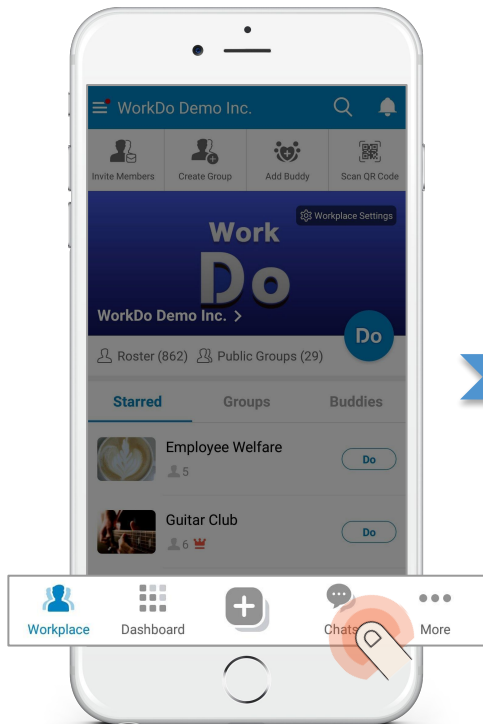
01 _____ Chats
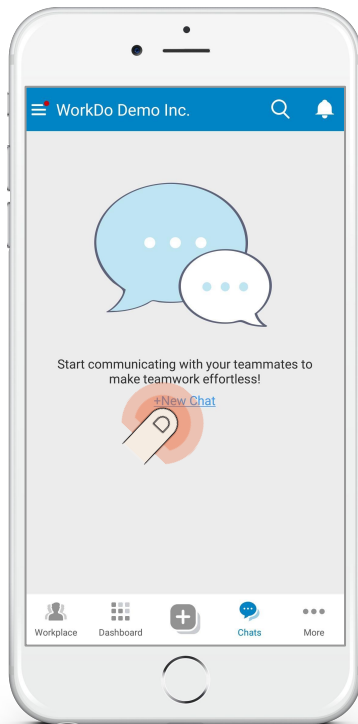
02 _____ + New Chat
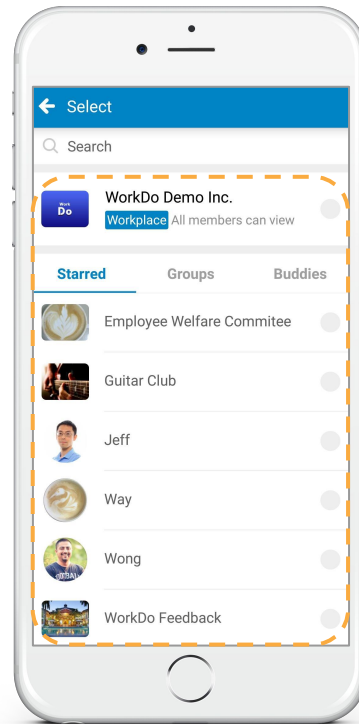
03 _ Choose where to chat

WorkDo

Chats: instant messaging
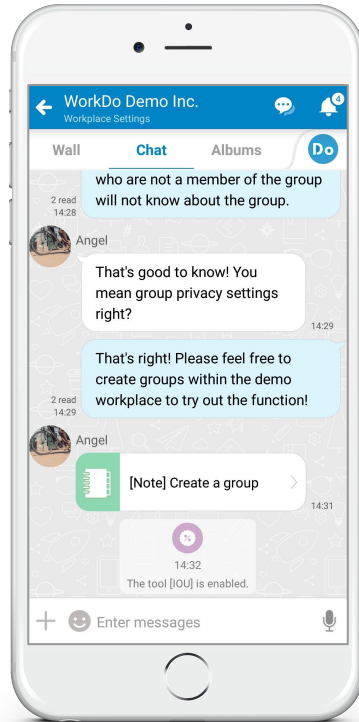
04 Includes notifications
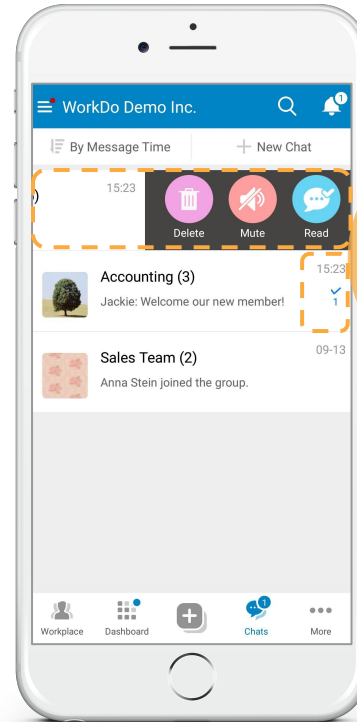
05 Secret menus

→ **Swipe left or right**

→ **Number of read**

More: personal stuff and app guide
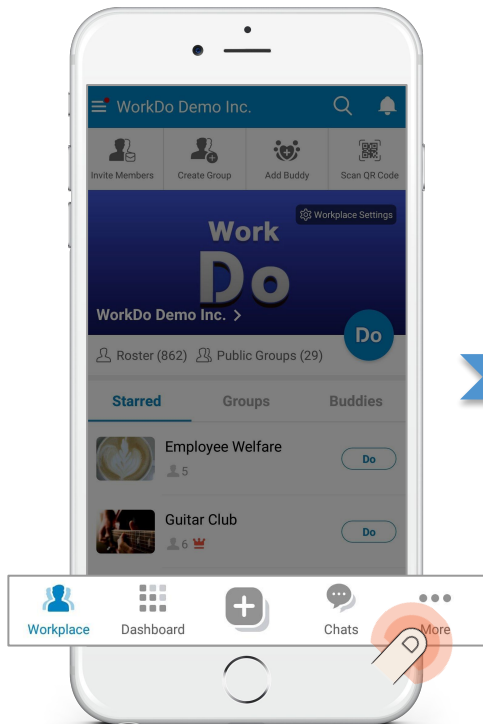
01 _____ More
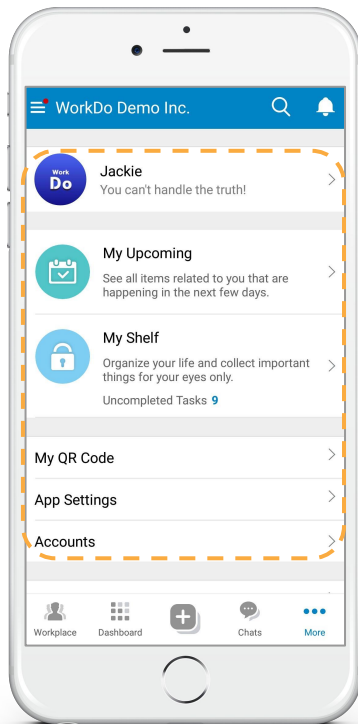
02 _____ Personalize
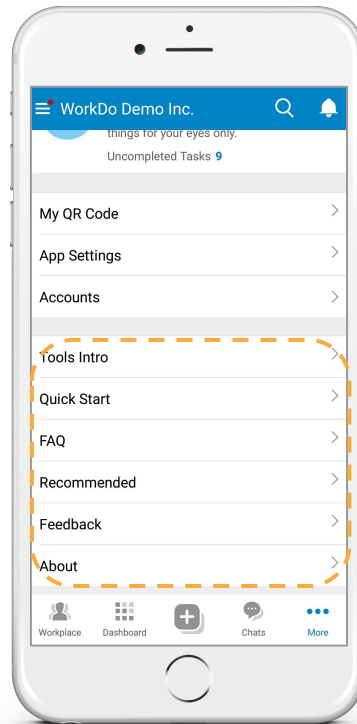
03 _____ App guide

Create workplace with company email

Use company email as a security measure

Limit access to company employees only

Create workplace: use company email

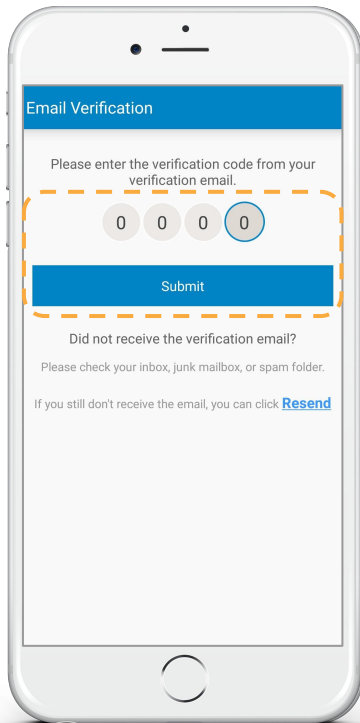## Phone 1 — Start WorkDo

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

Phone 2 — Start WorkDo

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

Phone 3 — Email Verification

Email Verification

Please enter the verification code from your verification email.
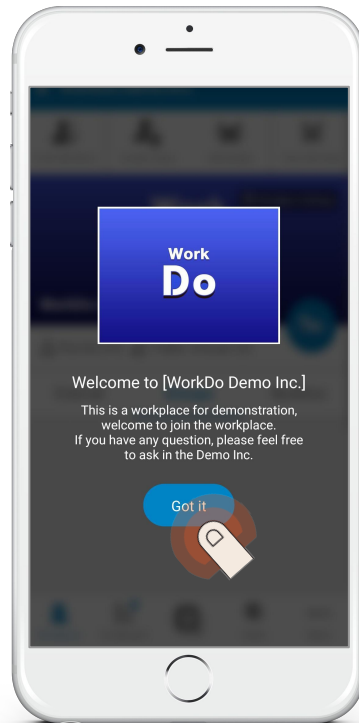
0   0   0   0

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

---

01 Enter company email

02 Submit

03 Verification code

WorkDo

Create workplace: use company email

04 Fill out info > Next
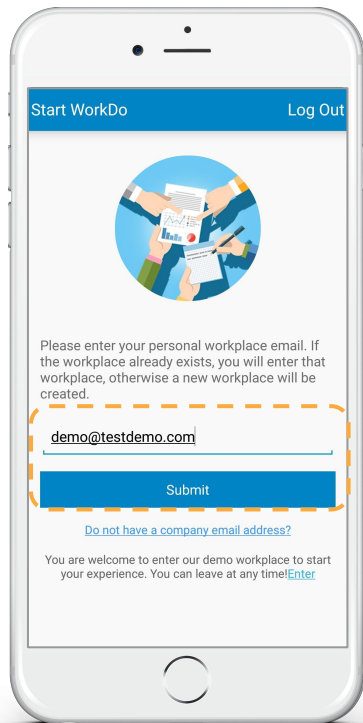
05 Enter your workplace

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)

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

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**

Work Do

Welcome to [WorkDo Demo Inc.]

This is a workplace for demonstration, welcome to join the workplace.
If you have any question, please feel free to ask in the Demo Inc.

Got it

01   Enter company email

02   Enter verification code

03   Welcome message

WorkDo

Join workplace

1. Join another workplace

2. Workplace uses company email

3. I have personal company email

Join workplace (workplace that uses company email)
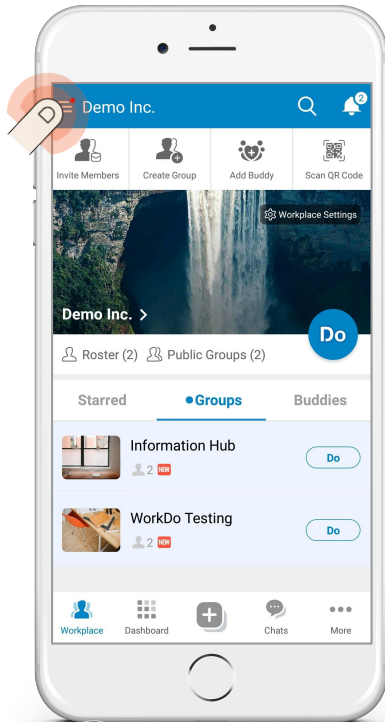
01 ___Workplace list___
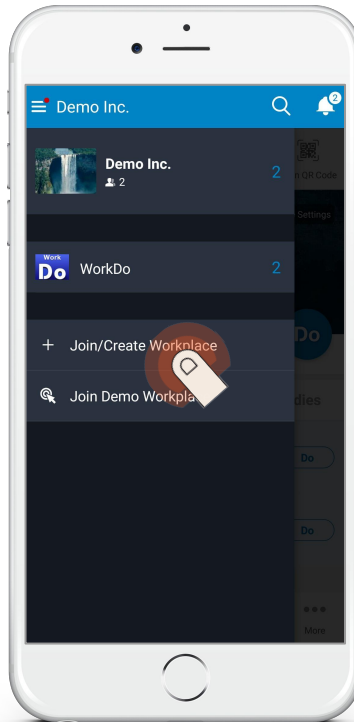
02 ___Join/Create Workplace___
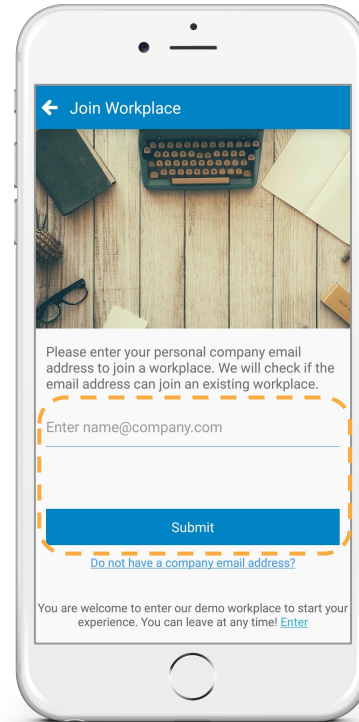
03 ___Enter company email___

Join workplace (workplace that uses company email)
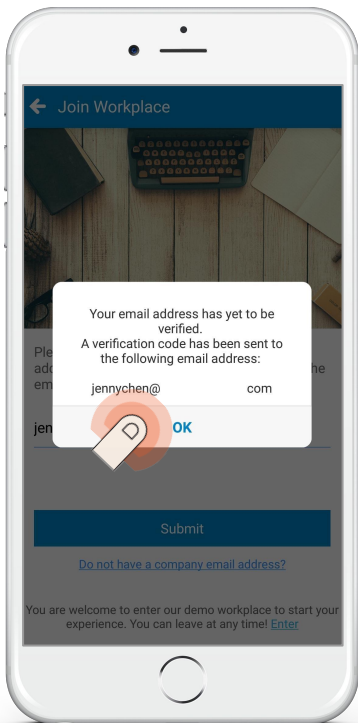
04 Check verification email
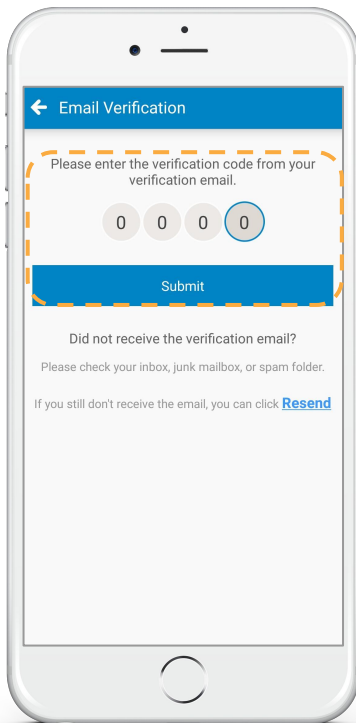
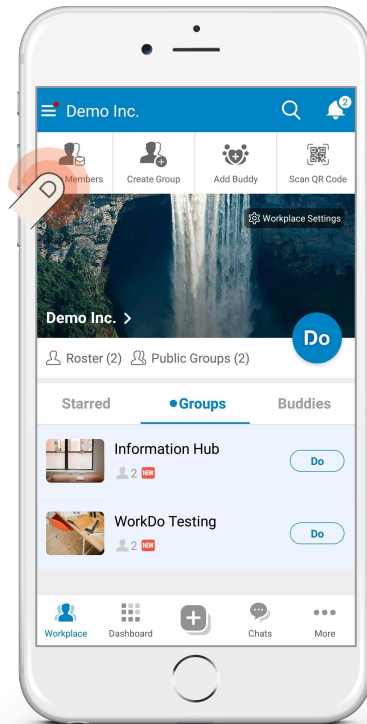**05** Enter verification code
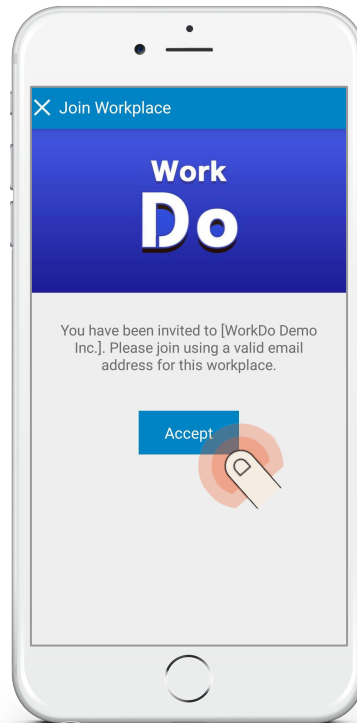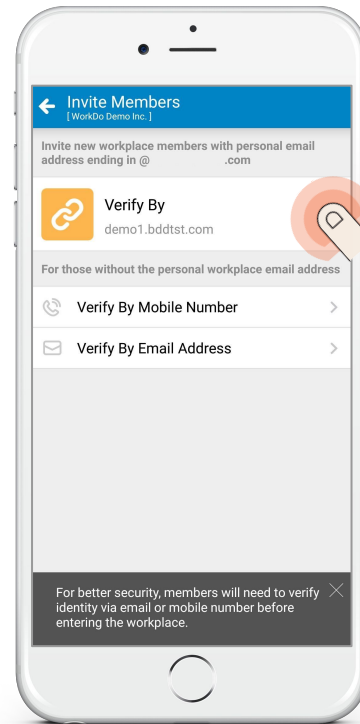
06 Click Accept

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)

Supports these apps but you need to install the apps first

← Invite Members Via

You can use different ways such as email, SMS, and copy invitation to invite others to join [Demo Inc.] workplace.

Facebook Messenger

WhatsApp

SMS

Email

Copy Invitation

Coworker clicks link and follow the steps to join

Jackie invited you to join [WorkDo Demo Inc.] on WorkDo

Inbox

Tina Herrera
to me
17:20 View details

Please join [WorkDo Demo Inc.] workplace with yourname@workdo.com on WorkDo.
It's an all-in-one app that makes teamwork effortless with many tools such as Tasks, Leave, HR and more.
https://www.workdo.co/d/sd76w/1

Reply   Reply all   Forward

04 Choose an invite method

05 Coworker clicks link

workDo

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)

03a Verify By Mobile Number   **03**b Verify By Email Address

Invite coworkers to join workplace (no company email)

Choose a method

Invite Members Via

You can use different ways such as email, SMS, and copy invitation to invite others to join [Demo Inc.] workplace.

- Facebook Messenger
- WhatsApp
- SMS
- Email
- Copy Invitation

Supports these apps but you need to install the apps first

Coworker clicks link

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It's an all-in-one app that makes teamwork effortless with many tools such as Tasks, Leave, HR and more.
https://www.workdo.co/d/sd76w/1

Reply   Reply all   Forward

Coworker clicks link and follow the steps to join

04   Choose a method

05   Coworker clicks link

workDo

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

01 Start WorkDo

02 Fill in required info

03 Verify email address

Create workplace: with free email
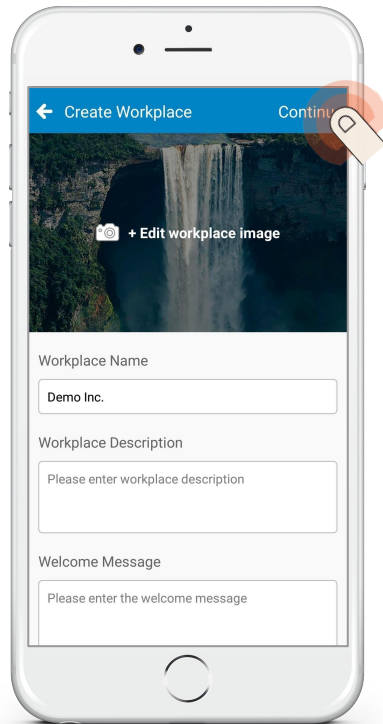
04 Fill out information
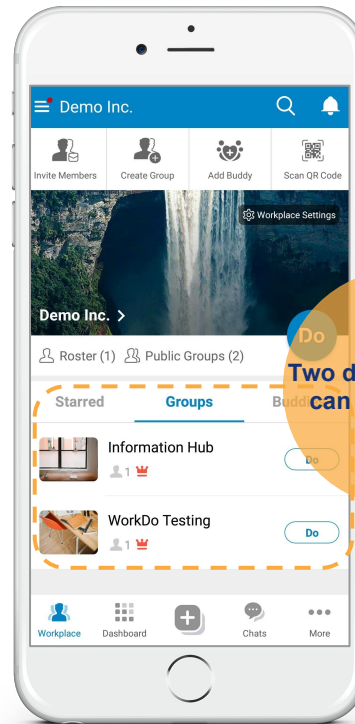
05 Enter workplace

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
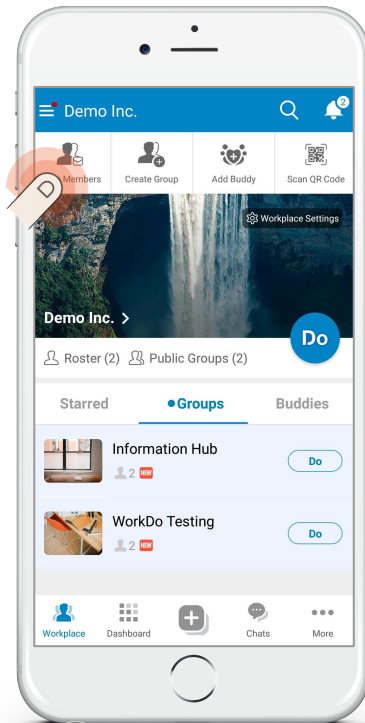
Invite coworkers to join workplace

01 ___ Invite Members

02 ___ Create invite with

Invite coworkers to join workplace

03a Verify By Mobile Number   **03b** Verify By Email Address

Invite coworkers to join workplace

Invite Members Via

You can use different ways such as email, SMS, and copy invitation to invite others to join [Demo Inc.] workplace.

Facebook Messenger

WhatsApp

SMS

Email

Copy Invitation

You have to install the apps first

Jackie invited you to join [WorkDo Demo Inc.] on WorkDo

Inbox

Tina Herrera
to me
17:20 View details

Please join [WorkDo Demo Inc.] workplace with yourname@workdo.com on WorkDo.
It's an all-in-one app that makes teamwork effortless with many tools such as Tasks, Leave, HR and more
https://www.workdo.co/d/lsd76w/1

Reply   Reply all   Forward

Coworker clicks link and follow the steps to join

04 __Choose a method__

05 __Coworker clicks link__

workDo

Create sub-groups

Create sub-groups for specific projects, topics and teams

A more flexible way to communicate

Create sub-groups
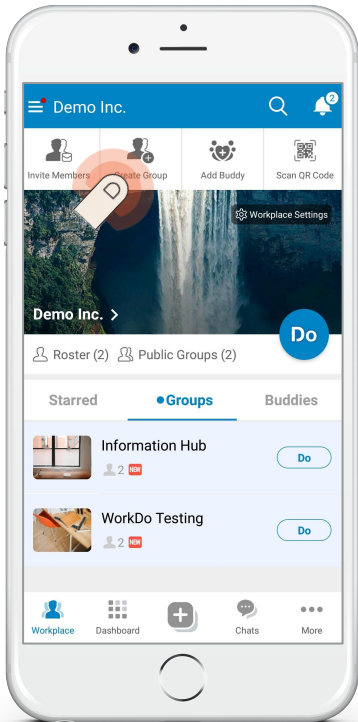
01 Create Group
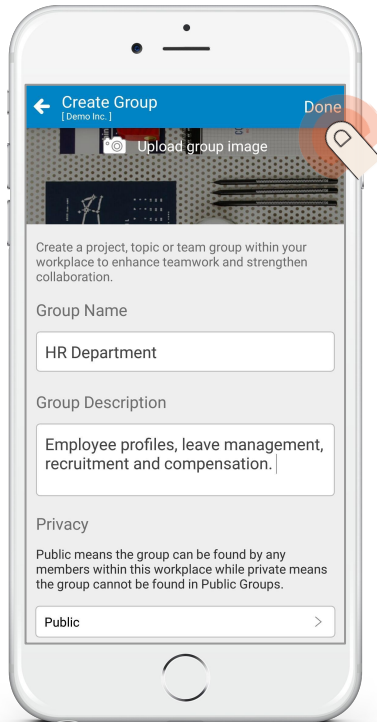
02 Fill out information
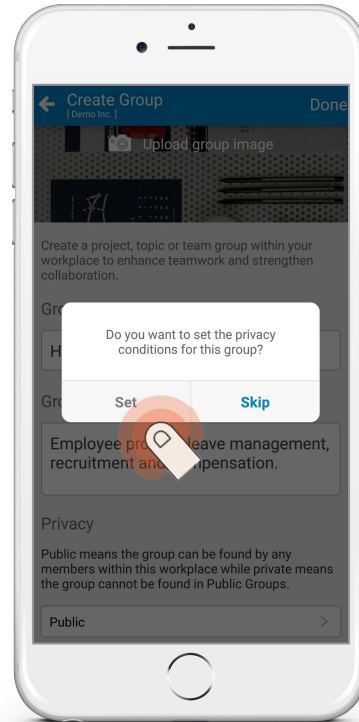
03 Click Set

Create sub-groups

Phone 1 (Screen 04)

Privacy
[HR Department]
Next

Public/Private

Turning this on means the group can be searched and found by non-members within the workplace.

Auto Accept

QR Code and Invite Link

Using QR code or invite link to join, the request will be accepted automatically, other types will require approval.

All

All types of join request will be accepted automatically.

Who Can Invite Members

Owner and Admin

This group only allows owner and admins to invite others to join.

Everyone

Everyone in this group can invite others to join.

Phone 2 (Screen 05)

✕ Add Members
Invite

| Buddies | Groups | Roster | QR Code | User ID |

Search

Anna Waltz

Jackie — Joined

Jenny Chen ✓

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

04 _Set group privacy_

05 _Choose add method_

workDo

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
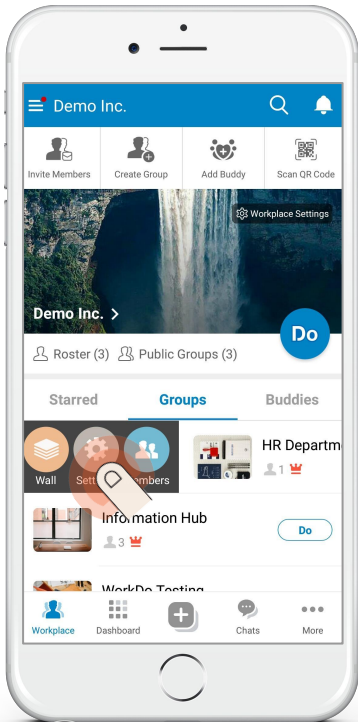
05   Group Settings
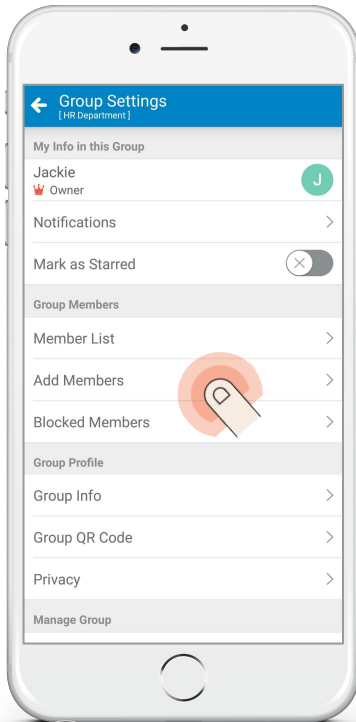
06   Add Members
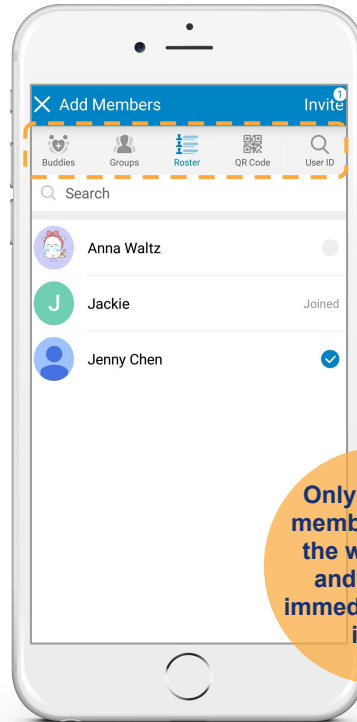
07   Choose add method

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

Join a sub-group

1. Find public groups

2. Join an existing team

Join a sub-group
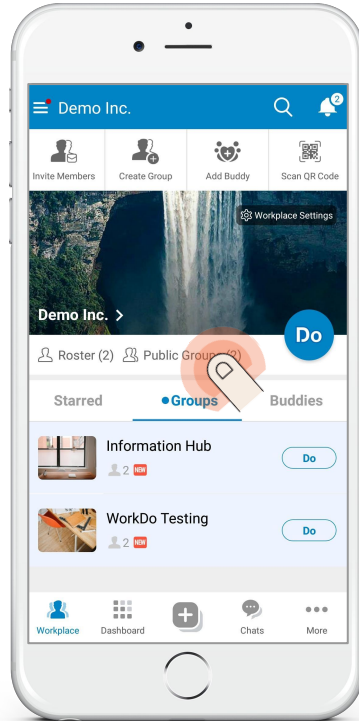
01   Public Groups
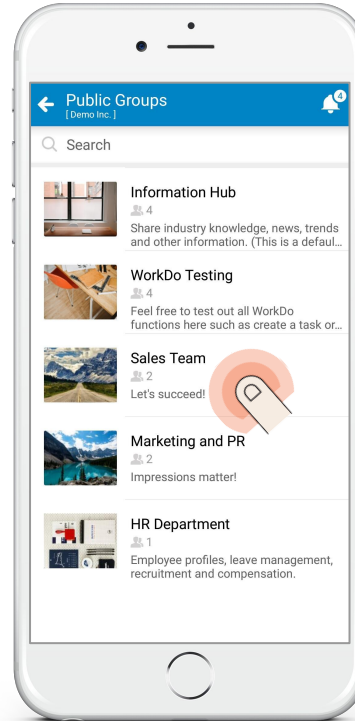
02   Choose a group

Join a sub-group
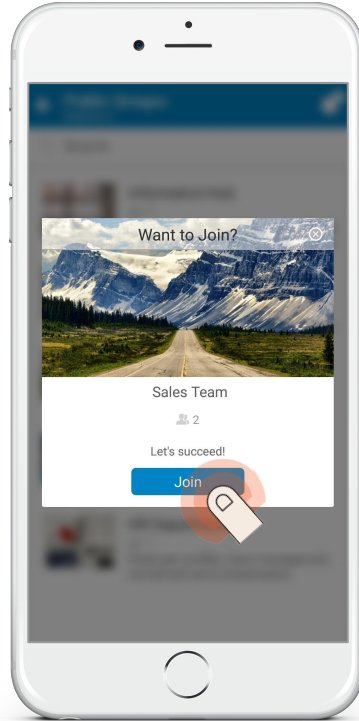
03 _____ Join
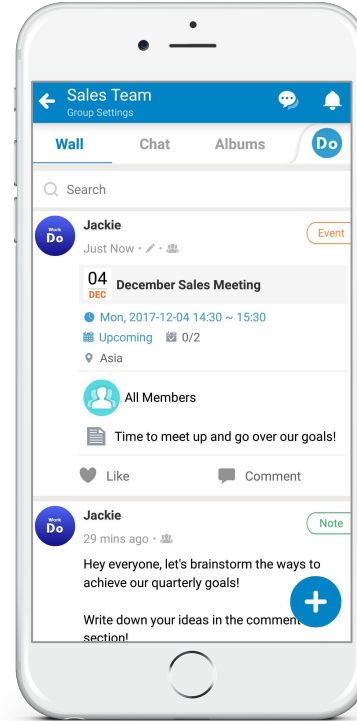
04 _____ Enter group wall

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
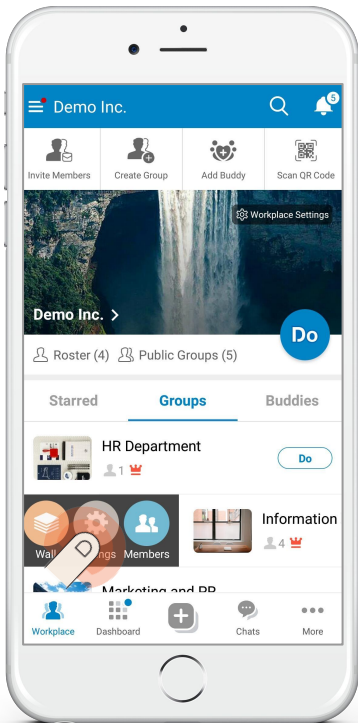
01 _____ Group Settings
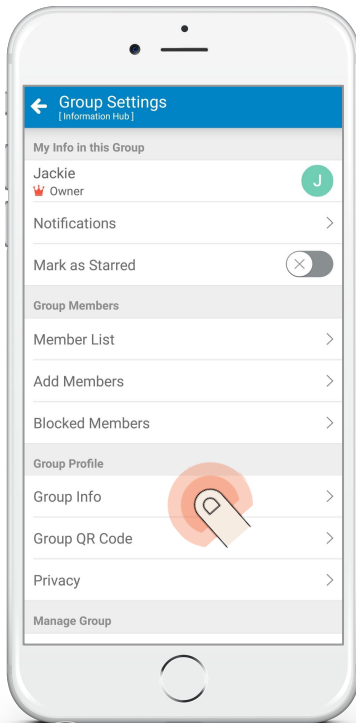
02 _____ Group Info
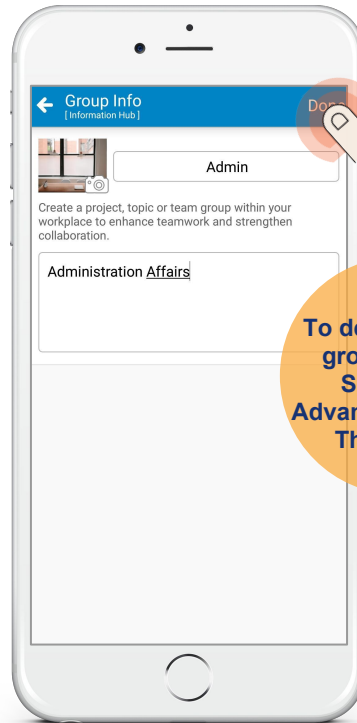
03 Change name and description

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
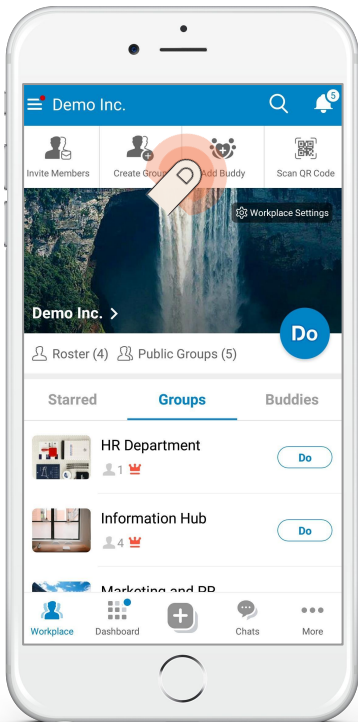
01 Add Buddy
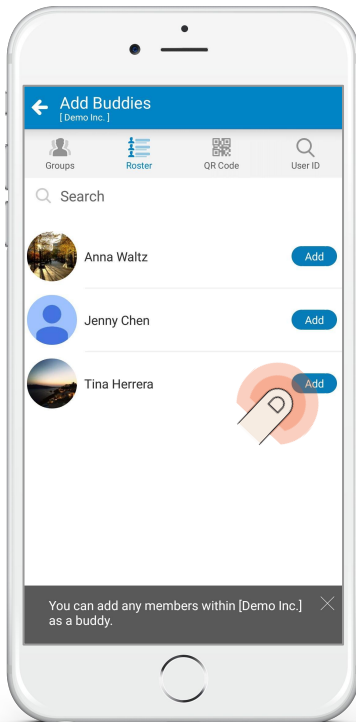
02 Choose member

03 Check Buddies list

Check added buddies in Buddies List

workDo
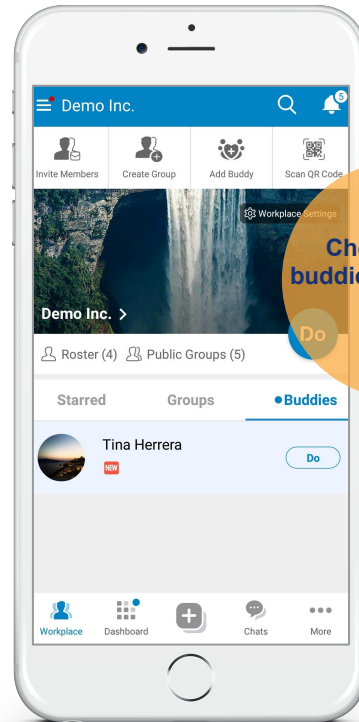
Tip: star groups and buddies

When you 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
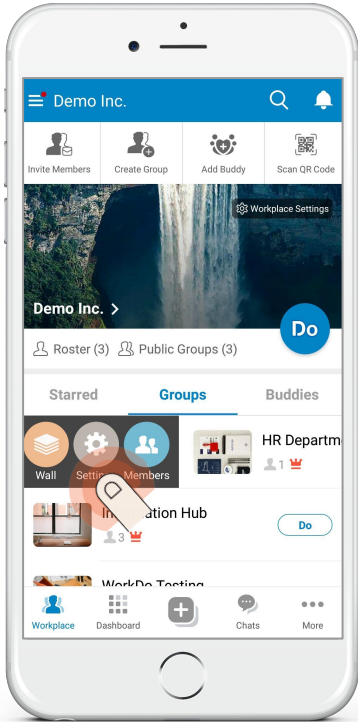
01   Group Settings
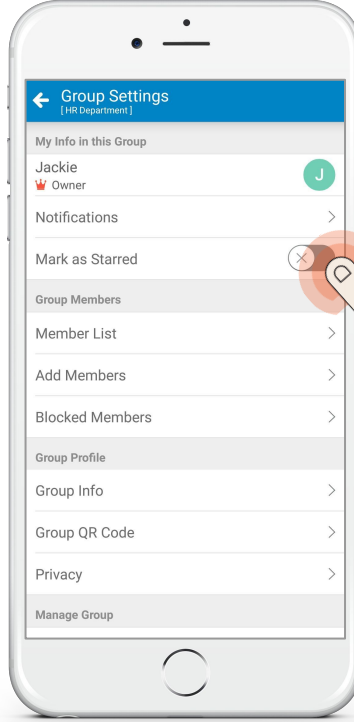
02   Mark as Starred
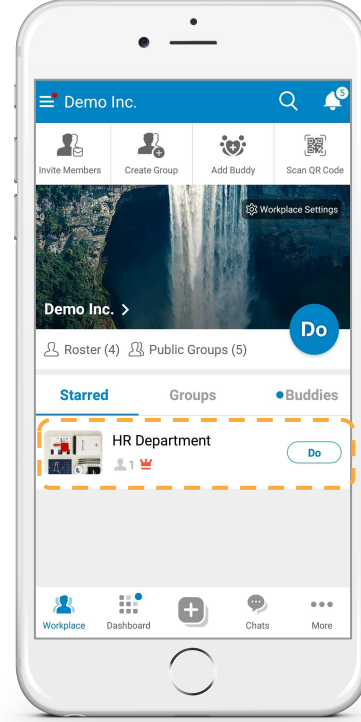
03   Check Starred list

Tip: star groups and buddies
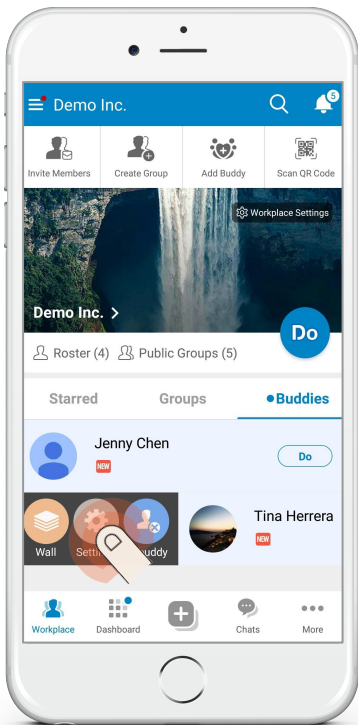
01 ___ Buddy Settings
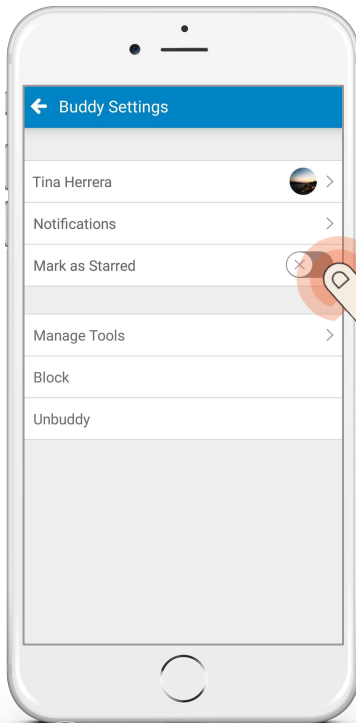
02 ___ Mark as Starred
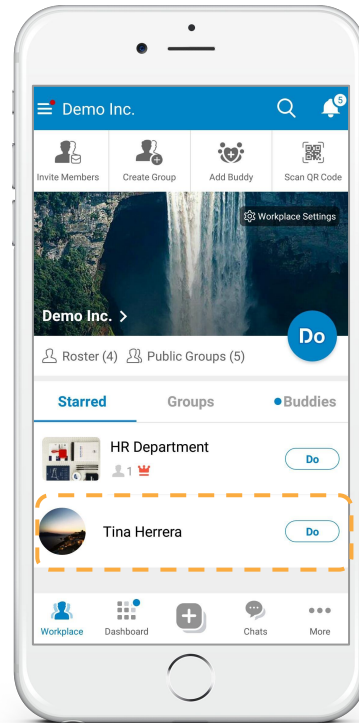
03 ___ Check Starred list

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 — Workplace Settings

Group — Group Settings
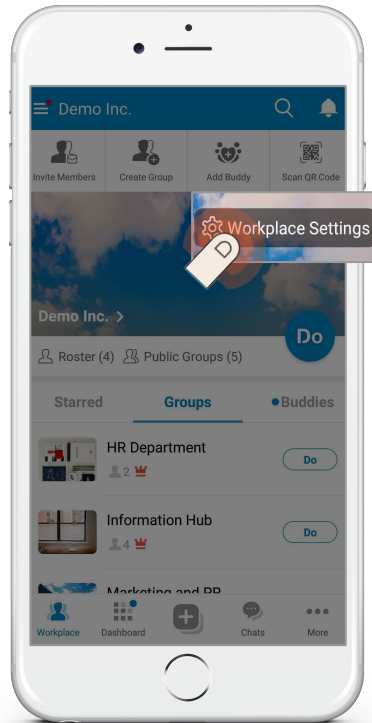
Workplace/group have the same settings in the next few steps
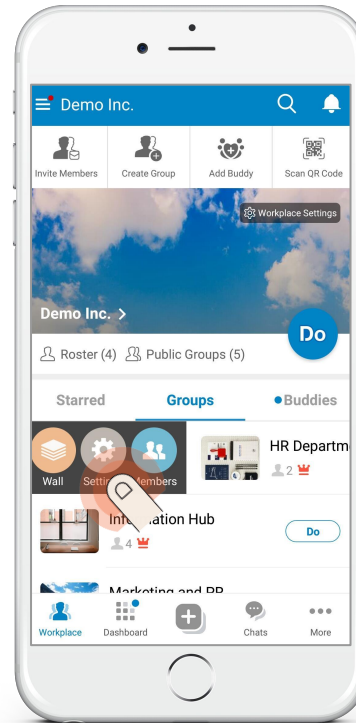
Add admins to manage workplace/group
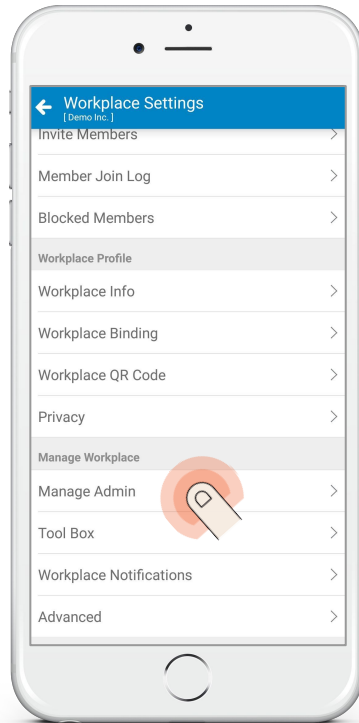
02 Manage Admin
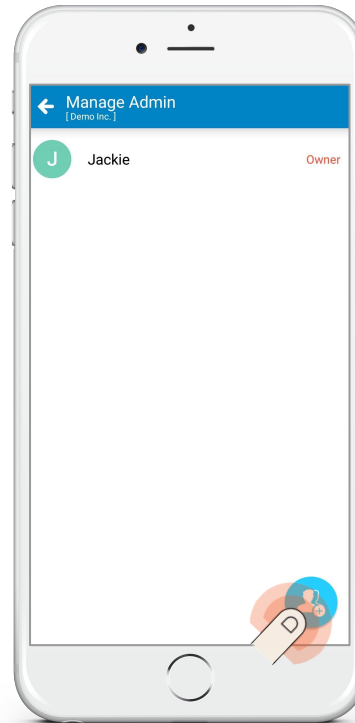
03 Assign

Add admins to manage workplace/group

Only contains members of the workplace/group

04 ___ Choose member

05 ___ Done!
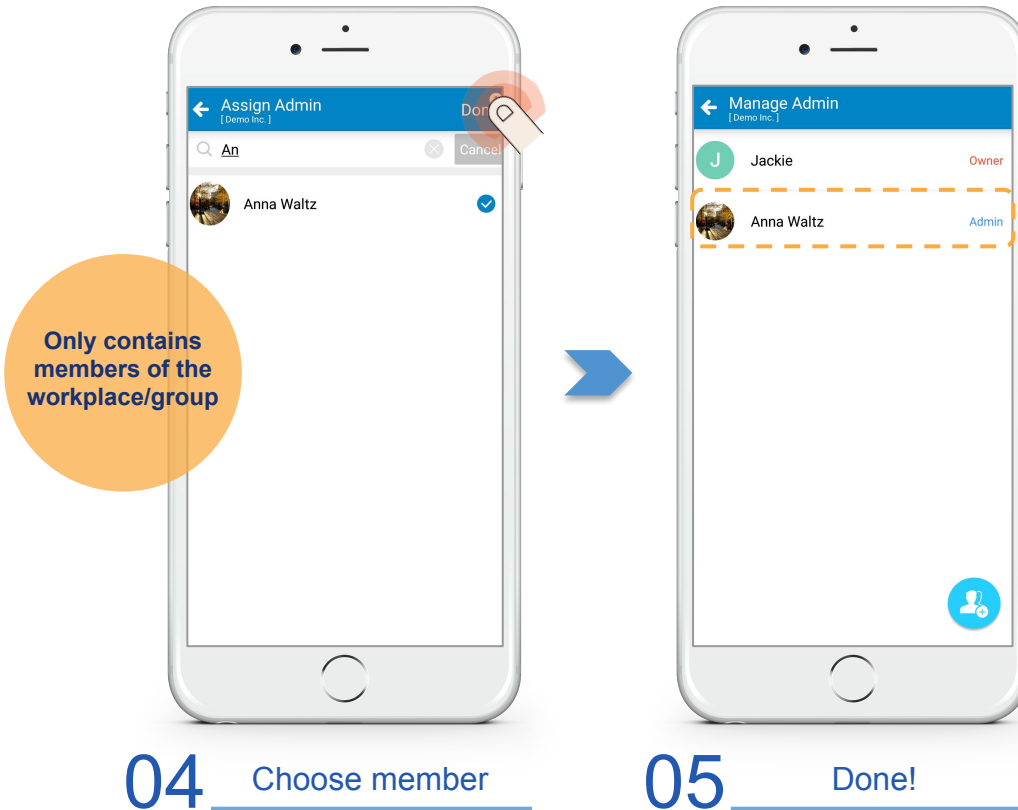
Do page has many tools to use...

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	•	•		

WorkDo

Activate tools and manage tool roles

Set different tool roles for different members

Manage leave or expense requests easily

Activate tools and manage tool roles
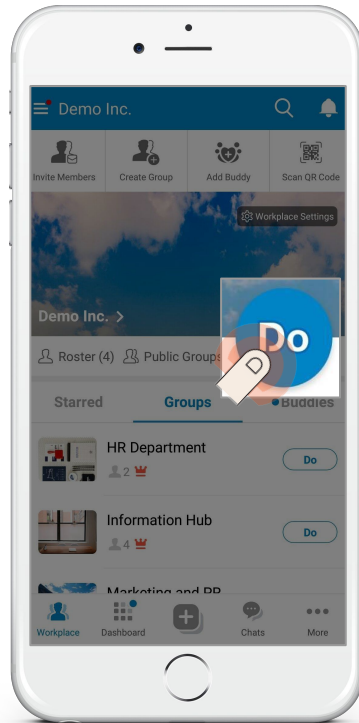
Workplace/group/buddy all have a set of tools, click Do to find out

Workplace _____ Do
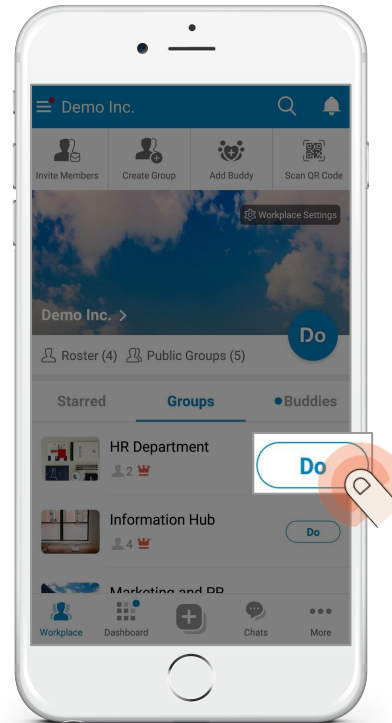
Group _____ Group or buddy Do

Activate tools and manage tool roles
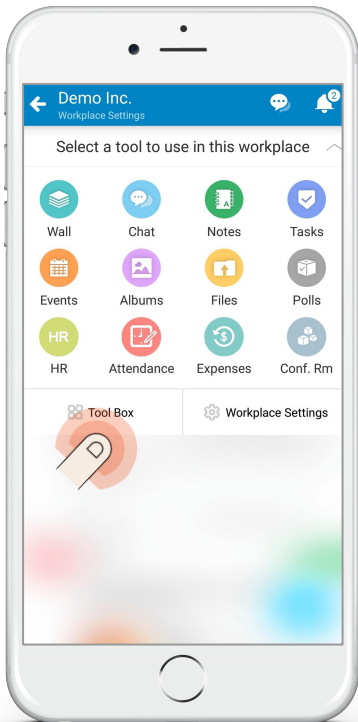
02 _____ Tool Box
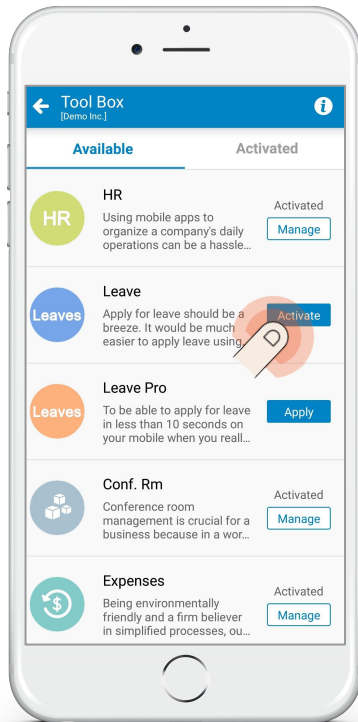
03 Available > Activate
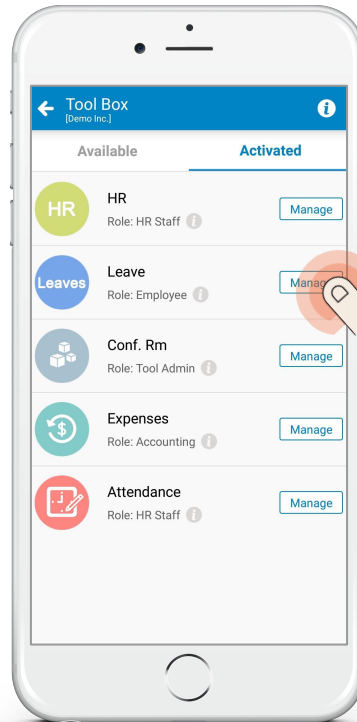
04 _____ Manage

Activate tools and manage tool roles

05 Manage All Member Roles

06 Choose new role > Change
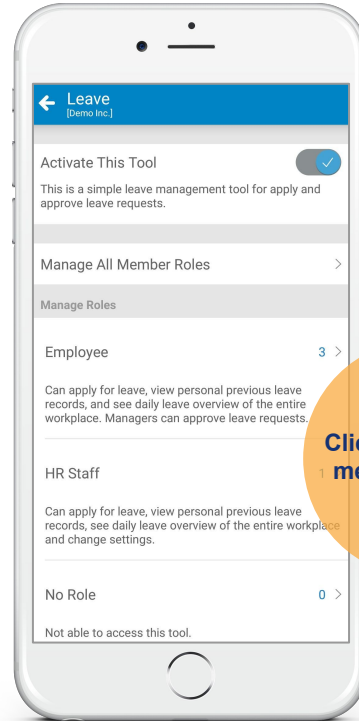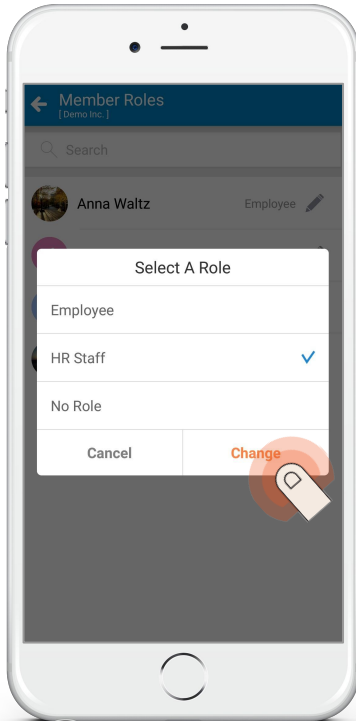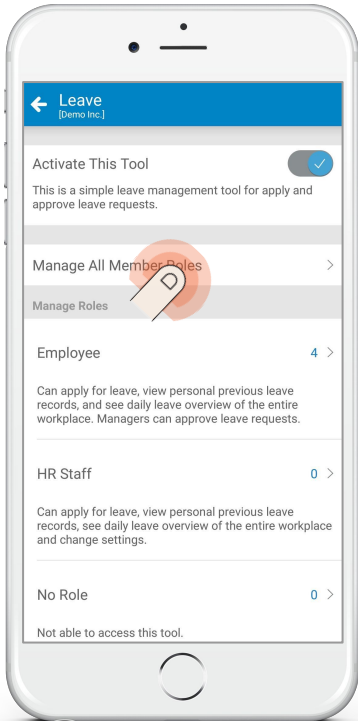
07 Done!

Click to check all members' roles

Change privacy settings

Workplace/group have privacy settings

Read carefully before changing privacy settings

Change privacy settings
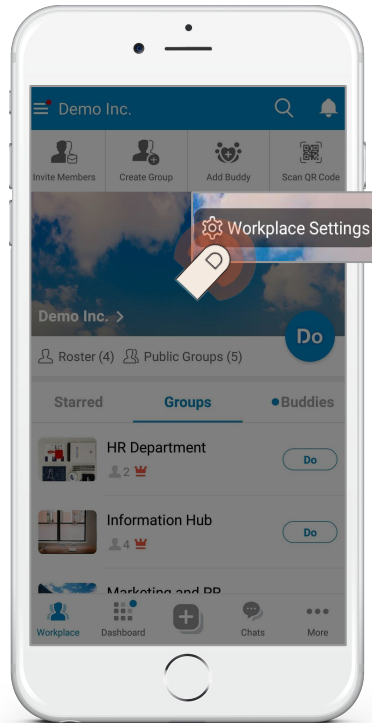
Workplace/group have different privacy settings

Workplace Workplace Settings
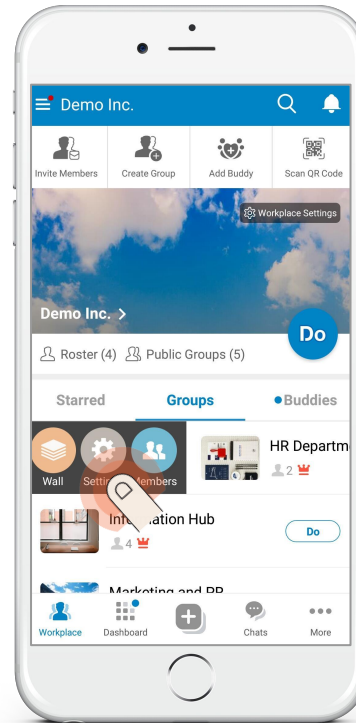
Group Group Settings

Change privacy settings
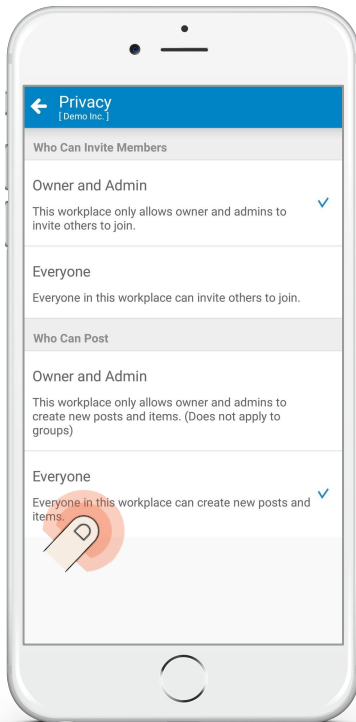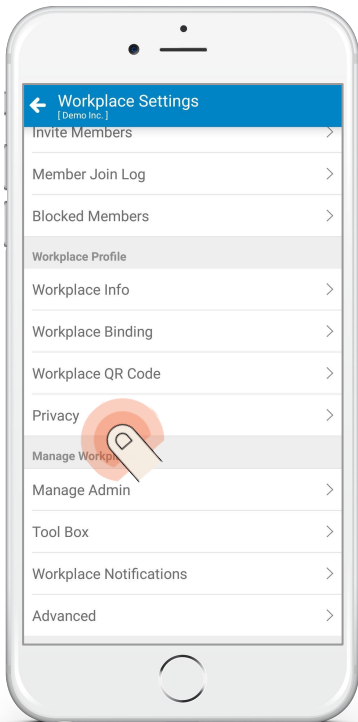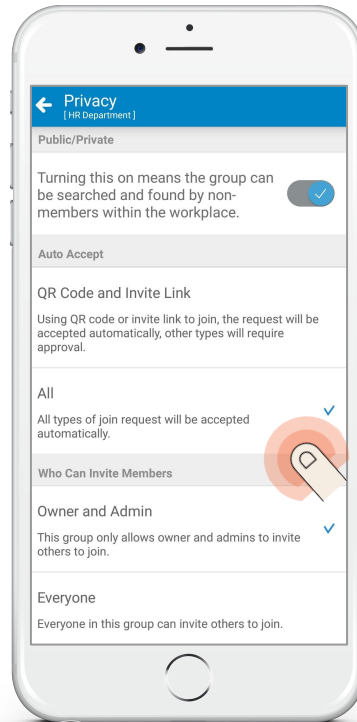
02 _____ Privacy

03a Workplace Privacy Settings

03b Group Privacy Settings

WorkDo

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
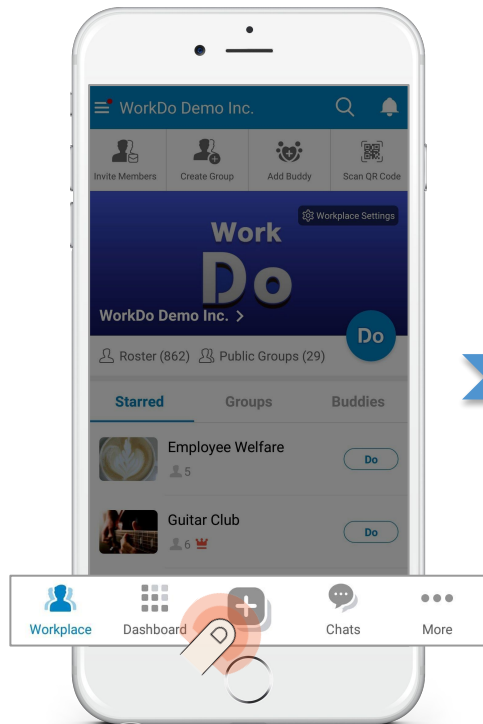
01 _____ +
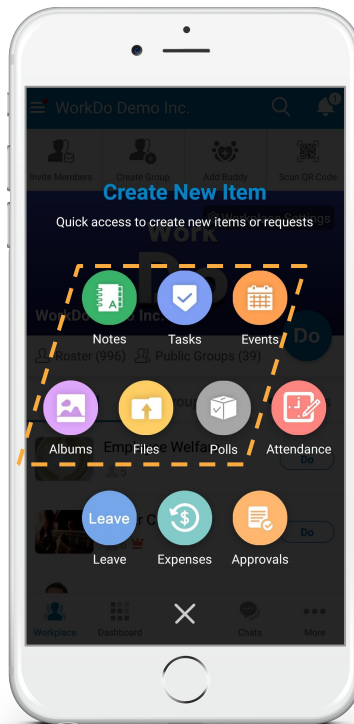
02 _____ Choose tool
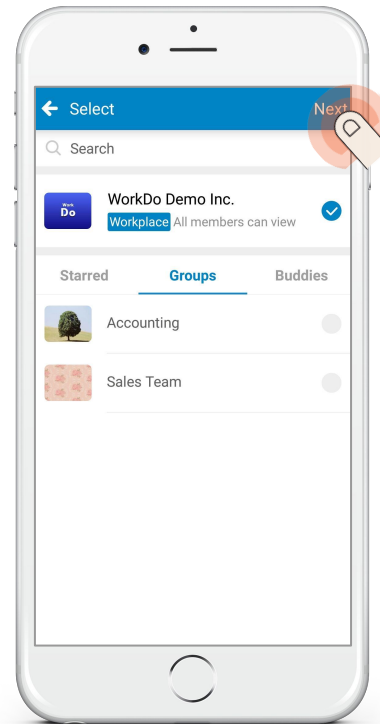
03 _____ Choose where

Use + button to create items quickly
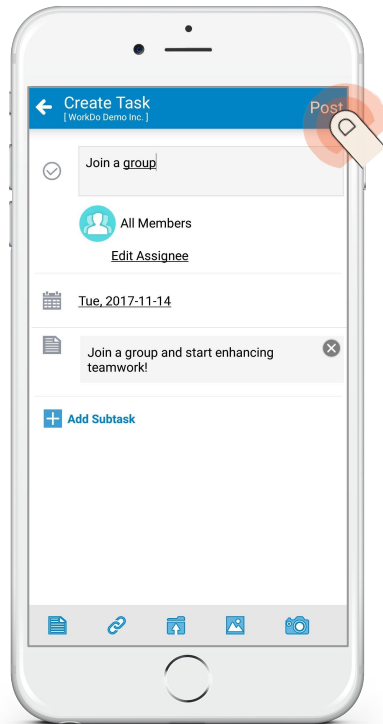
04 Fill out fields > Post
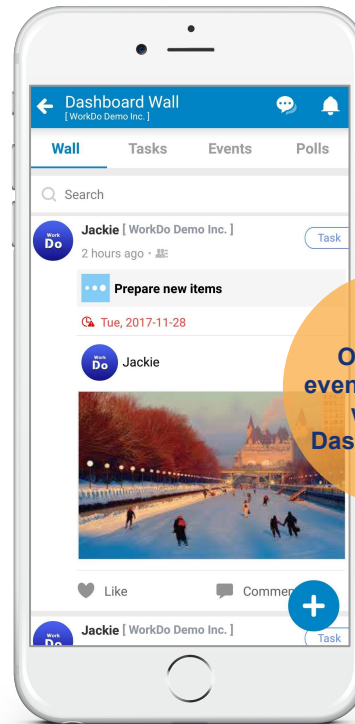
05 View in Dashboard Wall

View posted items

View posted items in workplace/group/buddy wall

View posted items: workplace/group/buddy

OR

OR
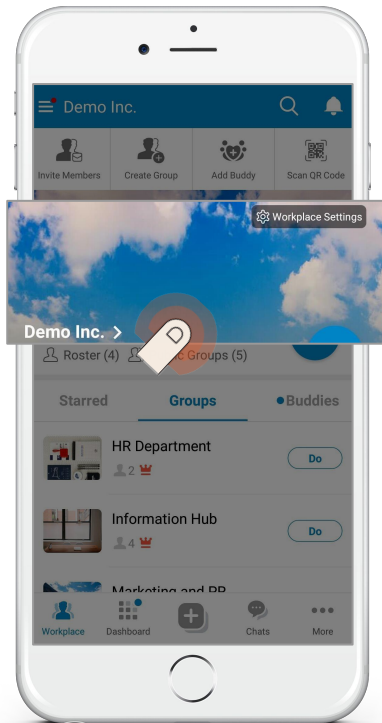
01_a Click workplace image
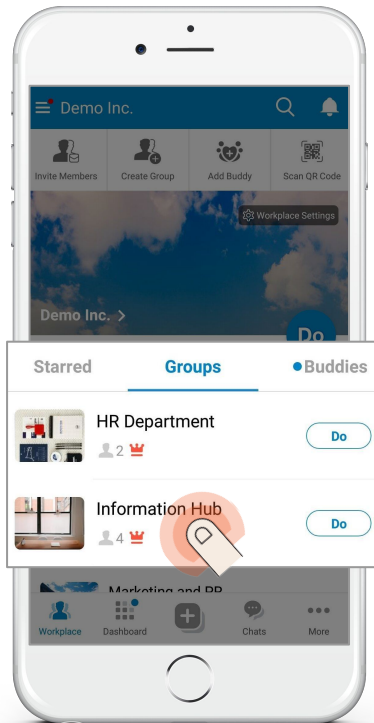
01_b Click group
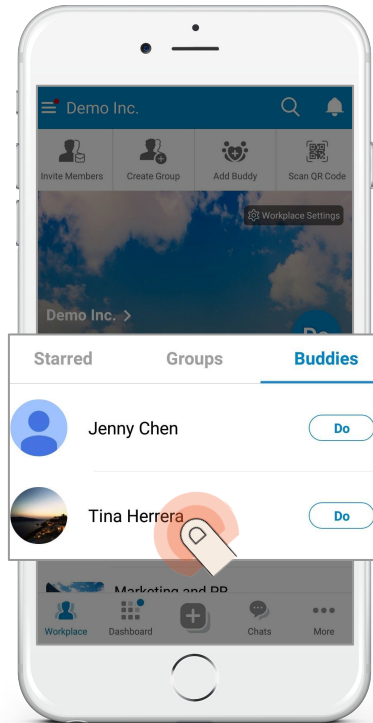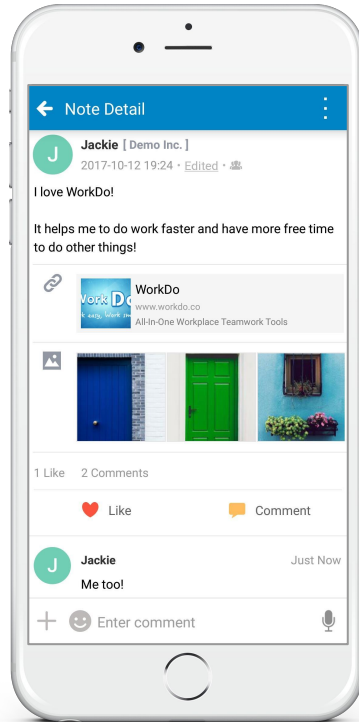
01_c Click buddy

View posted items: Notes

OR
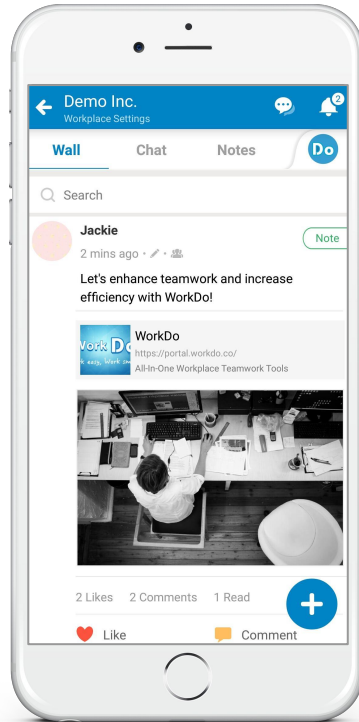
02ₐ **Wall > Scroll up/down**
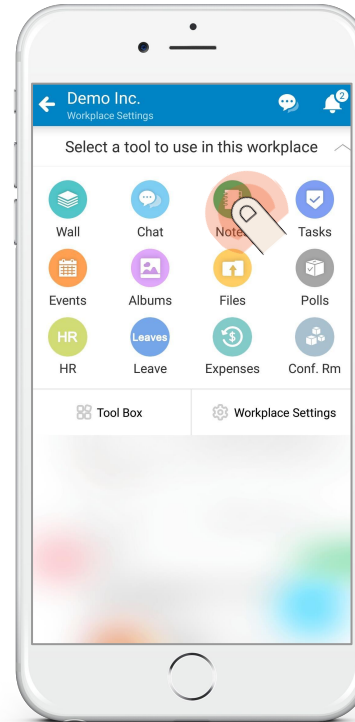
02♭ **Do > Choose Notes**
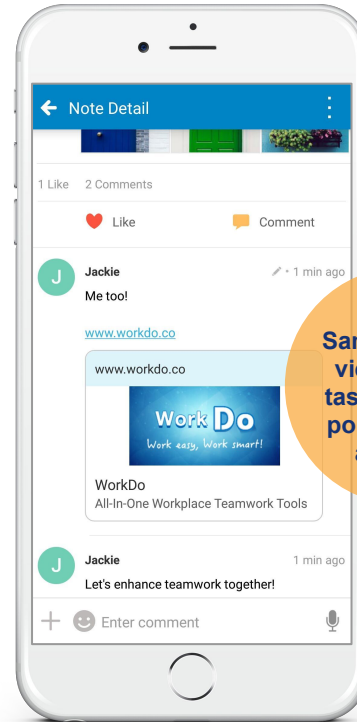
View posted items: Notes

03a Click to enter note detail

03b Like/Comment

Oops, I made a mistake, need to fix it
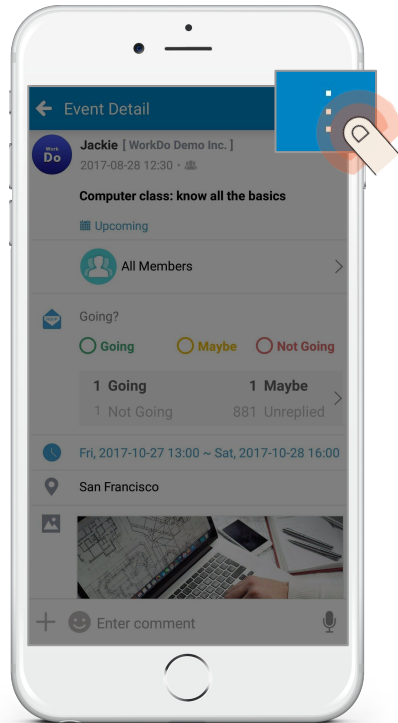
Don't worry
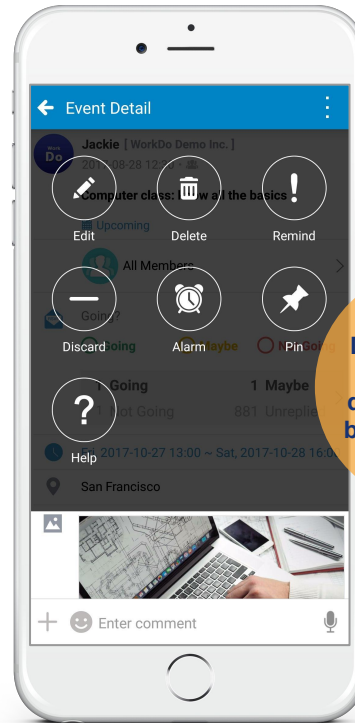
Back to the steps on previous
slides to enter detail

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

Edit posted items: Events

04 _____ More button

05 _____ Action buttons

Different basic tools have different action buttons in More
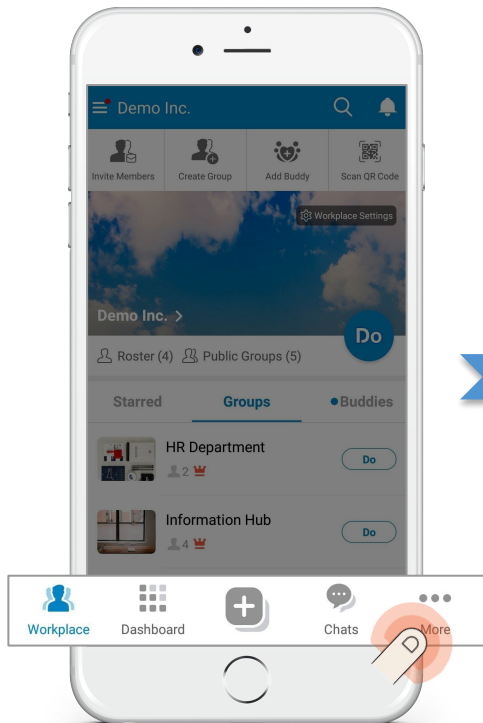
My Shelf

A private place to keep every personal item

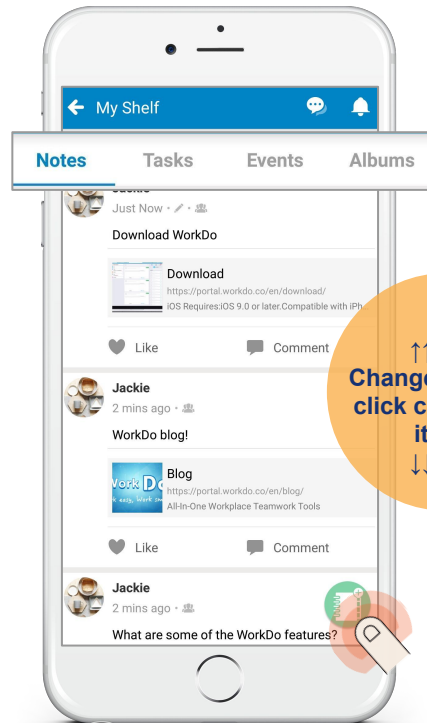Notes/Tasks/Events/Albums

Keep everything organized

My Shelf

01 _____ More
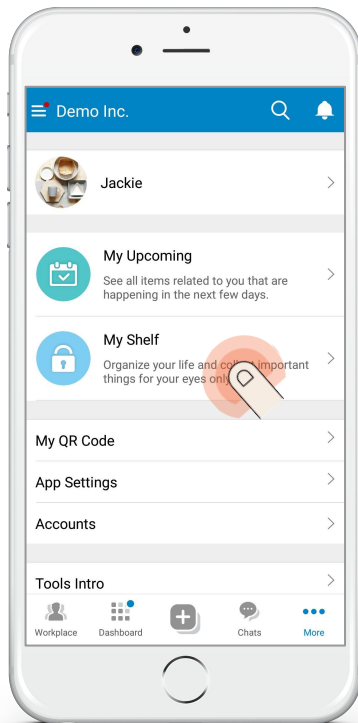
02 _____ My Shelf

03 _____ Stay organized

Work easy, work smart!

🌐
www.workdo.co

f
WorkDo
Facebook

More in
Quick Start