

WorkDo
Quick Start

Settings

Getting Started!



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V220407

About WorkDo

- 1.1 [Management](#)
- 1.2 [All You Need is Right Here](#)
- 1.3 [Collaboration Tools](#)
- 1.4 [Experience It](#)
- 1.5 [Is It Difficult to Set Up?](#)
- 1.6 [Levels](#)

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 [Member Invite](#)

Join Workplace

- 3.1 [Guided Sign Up](#)
- 3.2 [Self Sign Up](#)

Settings

- 6.1 [Add Admins](#)
- 6.2 [Privacy Settings](#)
- 6.3 [Tool Dependency](#)
- 6.4 [Tool Activation & Tool Roles](#)
- 6.5 [User Guide Download](#)

Organization Structure

- 5.1 [Employee Info Import](#)

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](#)

1. About WorkDo

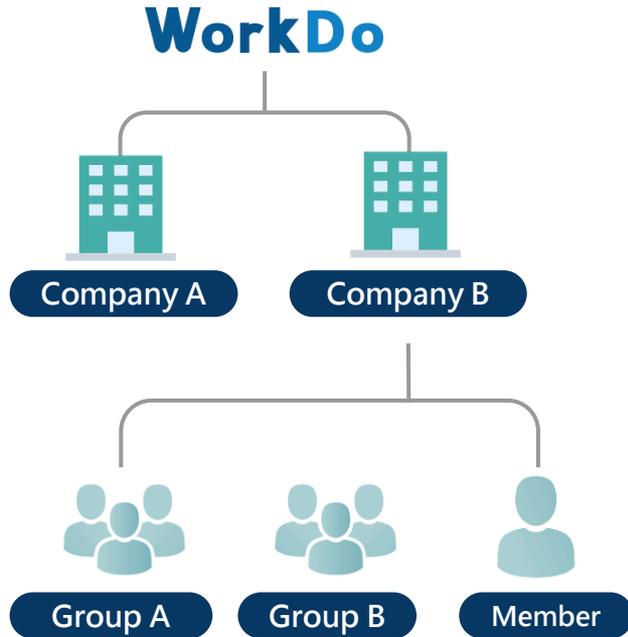
- 1.1 [Management](#)
- 1.2 [All You Need is Right Here](#)
- 1.3 [Collaboration Tools](#)
- 1.4 [Experience It](#)
- 1.5 [Is It Difficult to Set Up?](#)
- 1.6 [Levels](#)

1.1 Management

- Clear organizational structure
- Easy information flow management

1.1 Security & Flexibility

Best
Choice



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



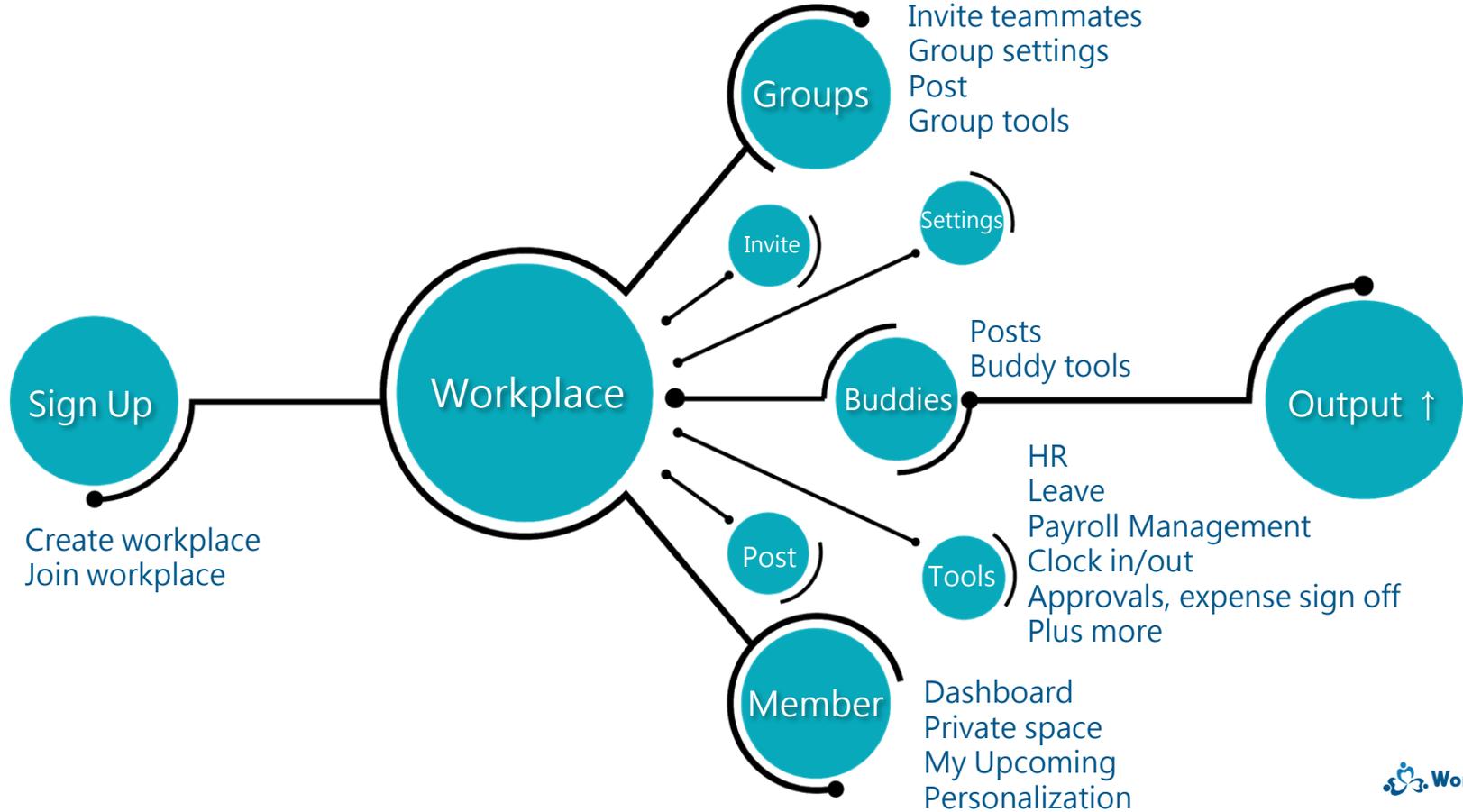
Digital Management

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

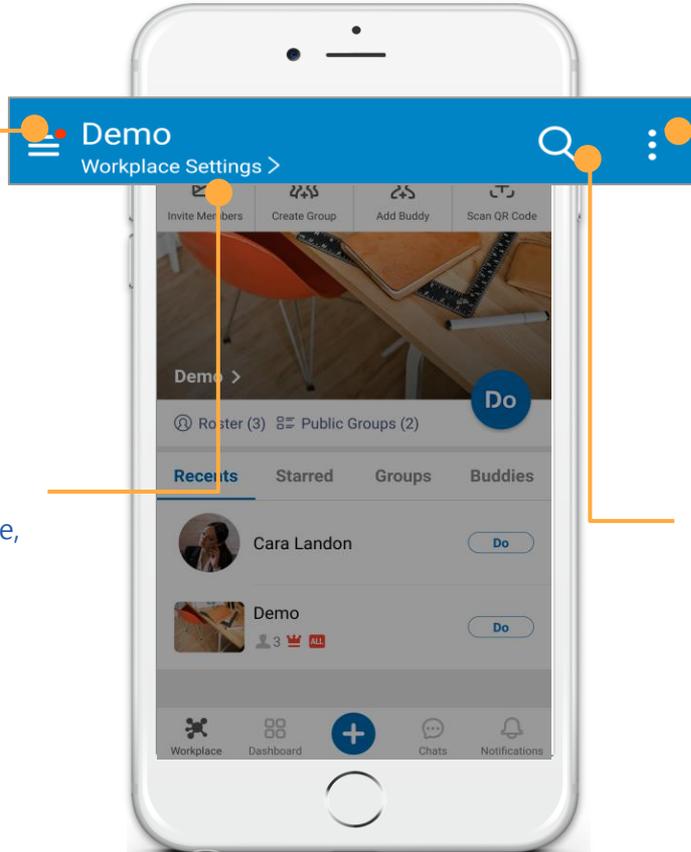
- Shows your current workplace, group, buddy and settings.
- Click to change the privacy, notification and personal settings.

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

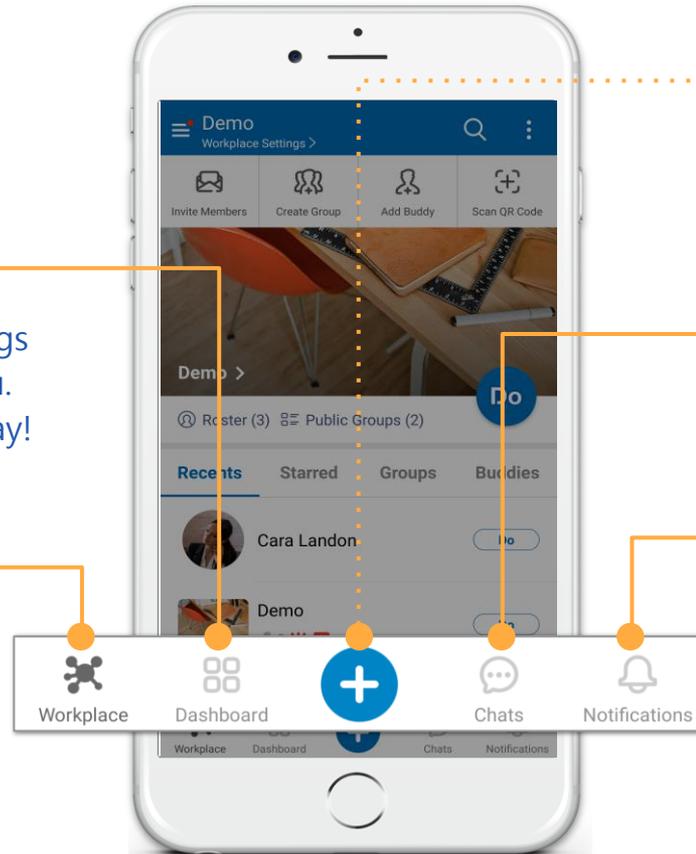
Assign tasks, apply leaves, add notes or what have you, everything begins here.

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

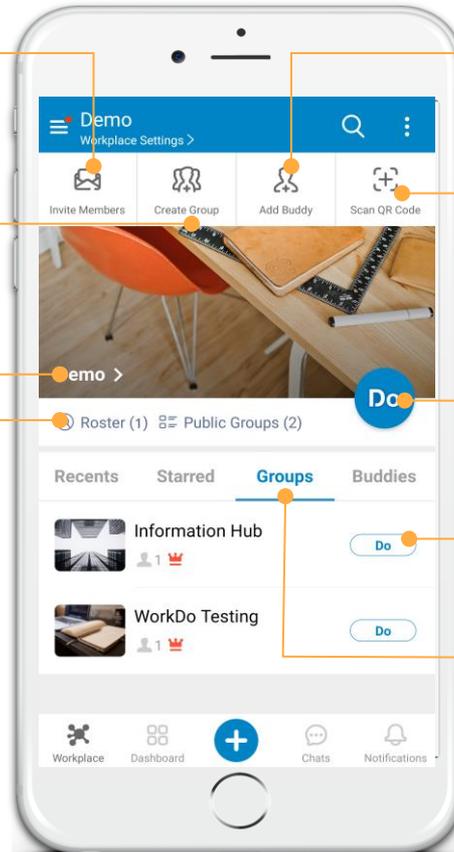
Create groups for any project or topic you wish.

5. Workplace Wall

See what's going on in the workplace.

6. Roster & Public Groups

View workplace members and public groups you can join.



3. Add Buddy

Offers 4 ways to add buddies.

4. Scan QR Code

Scan the QR code to add new groups or buddies.

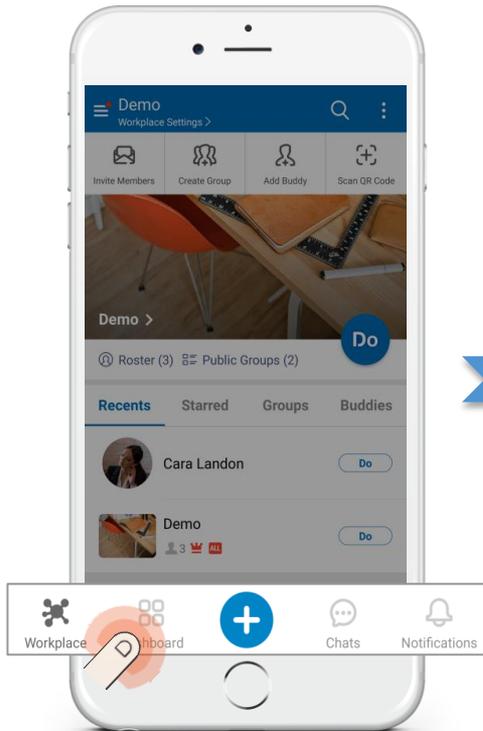
7. Do Tools

Access all the tools and start collaborating.

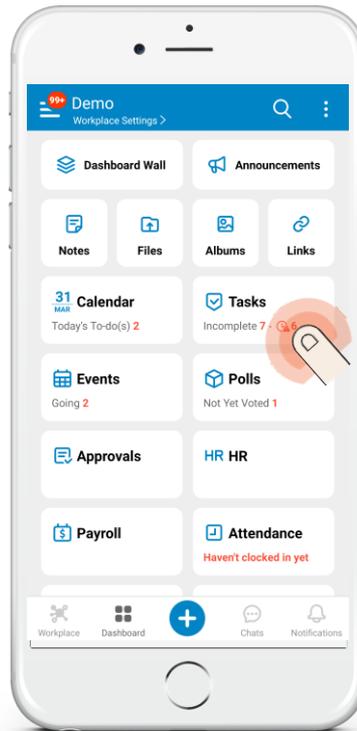
8. Group & Buddy List

Switch between groups and buddies.

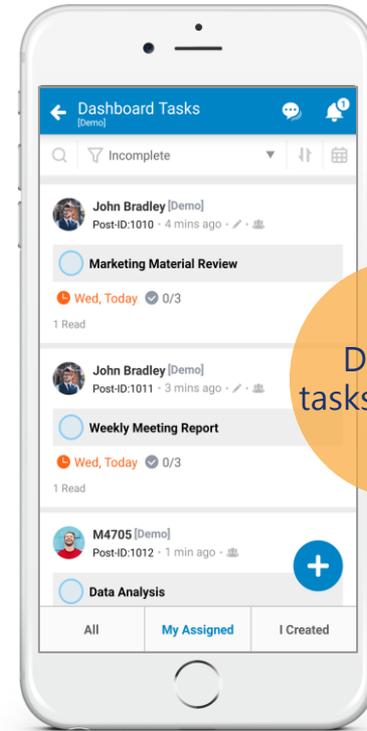
1.5.2 Dashboard: Your Day at a Glance!



01 Dashboard



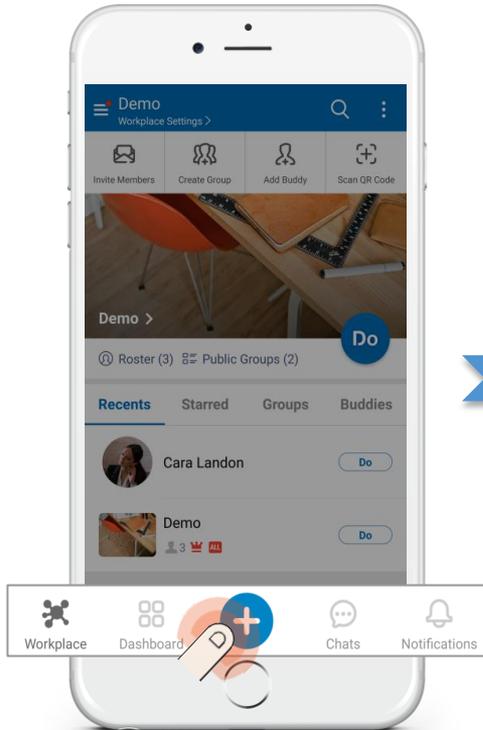
02 Your to-do list



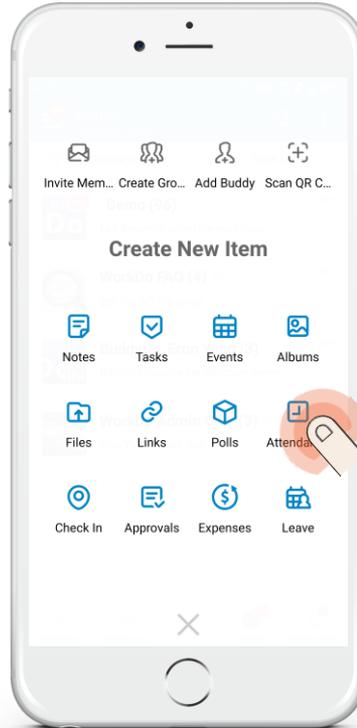
03 Clear & intuitive

Different tasks, different tabs.

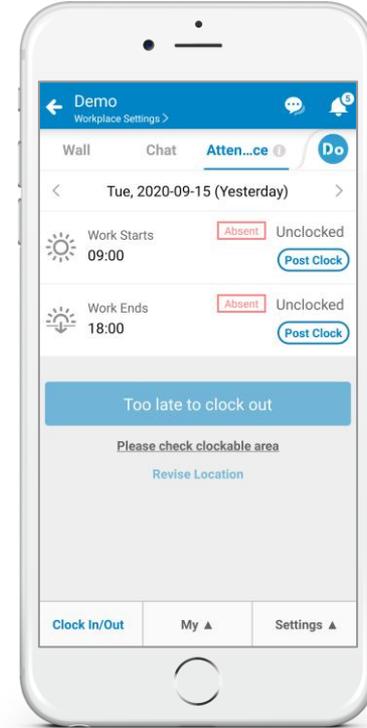
1.5.2 Quicker Tool Access with +



01 + Create

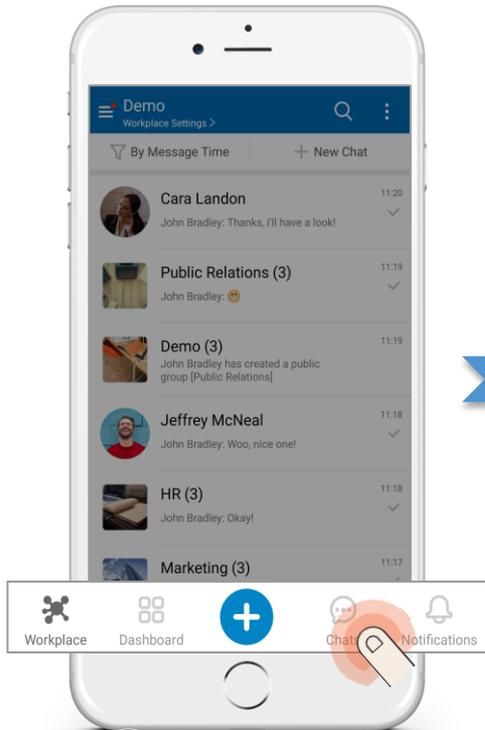


02 Select a tool from your frequently used tool list

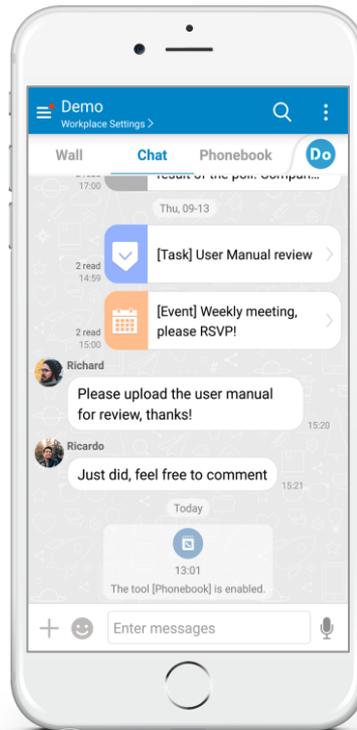


03 Quick tool access

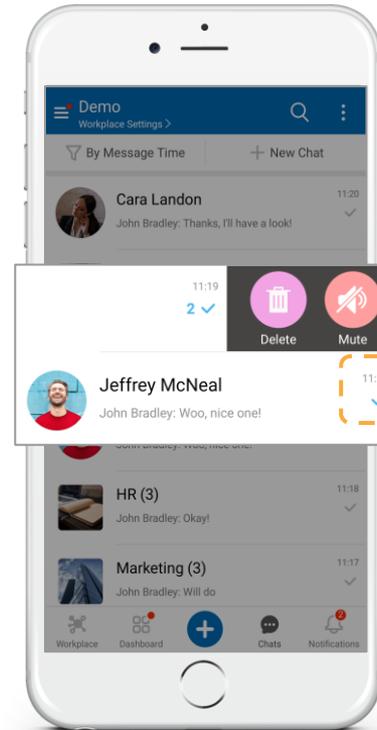
1.5.2 Real-Time Instant Messenger



01 Chats



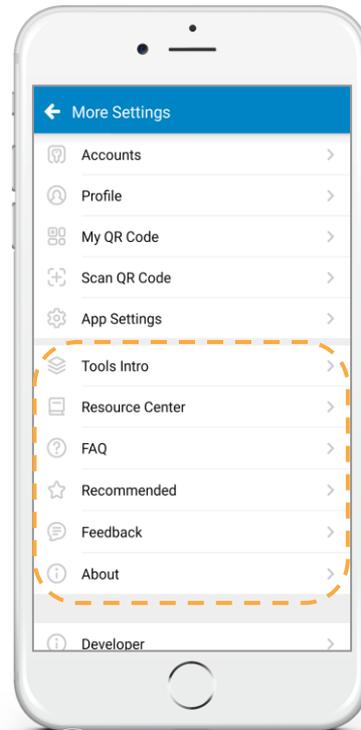
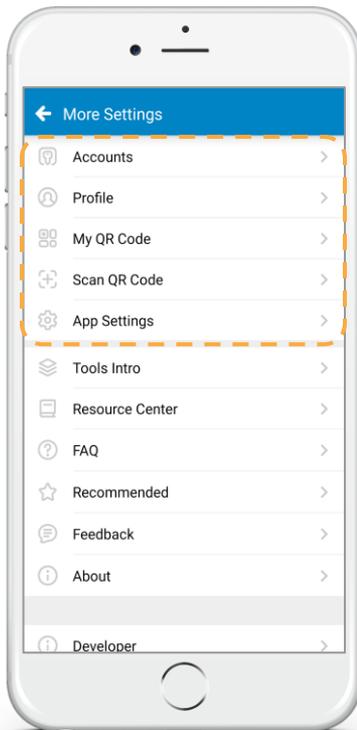
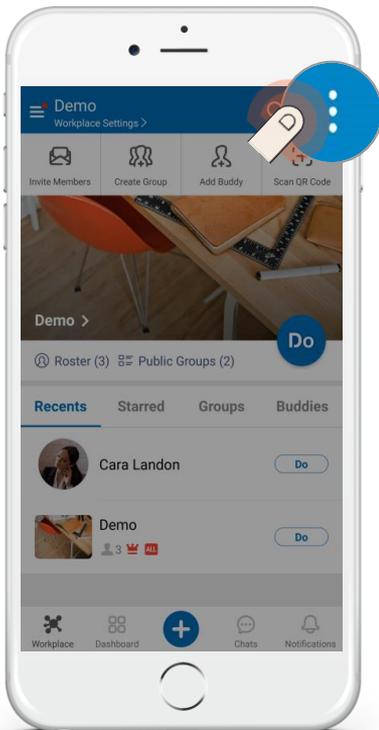
02 Keeps you in the loop



03 Did you know?

→ Swipe for hot keys
→ Read receipt available

1.5.2 Personalize Your App



01 Click more for settings

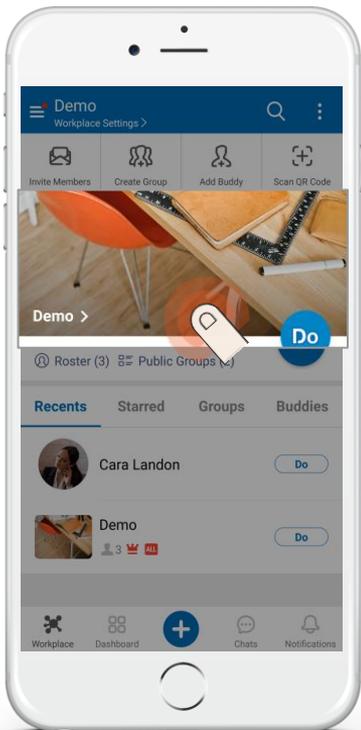
02 Personalize your app

03 Help is here!

1.6 Levels

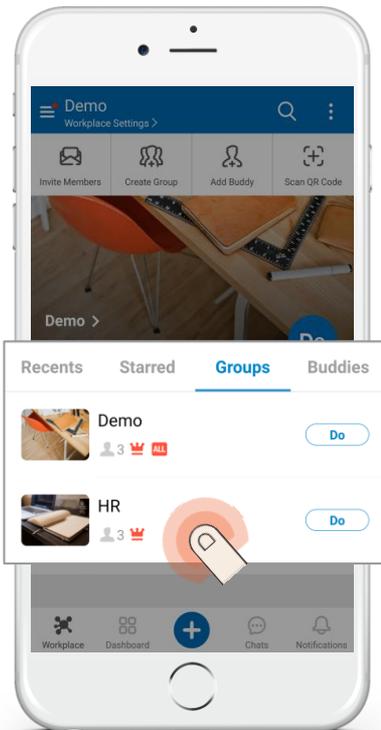
View, Create, Edit
Workplace, Group & Buddies
Consistent UI

1.6 Information Compartmentalized



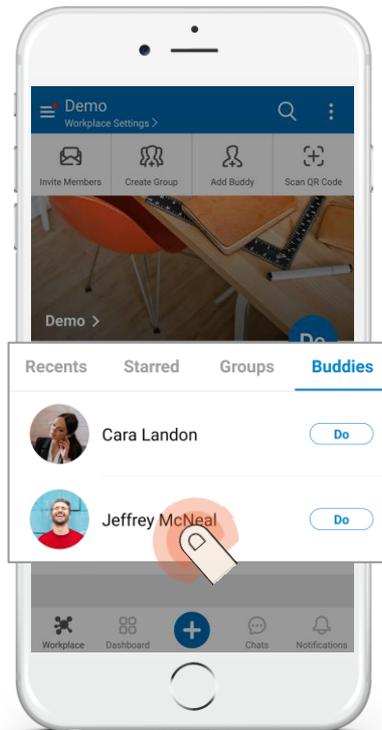
01_a Workplace banner

OR



01_b Select a group

OR



01_c Or a buddy

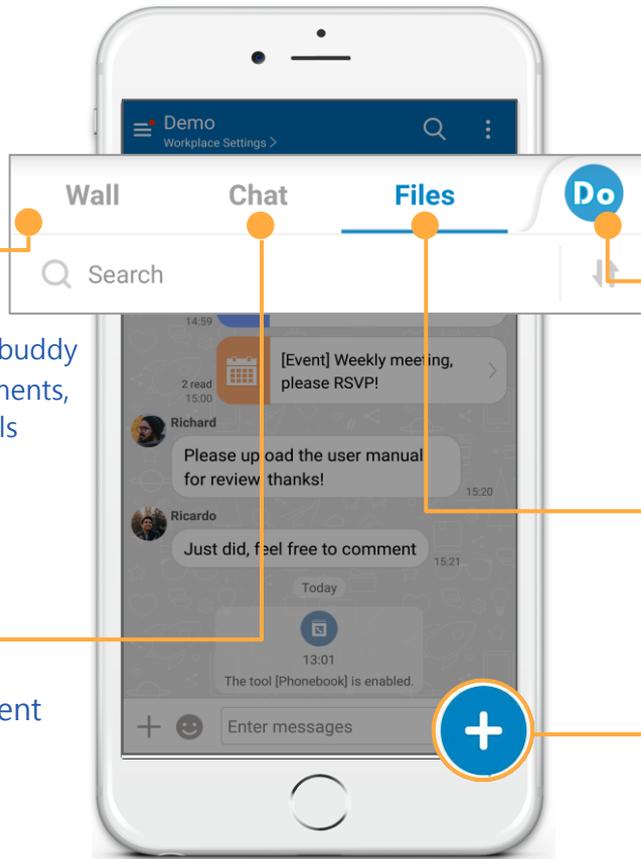
1.6 Unified UI Across All Levels

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

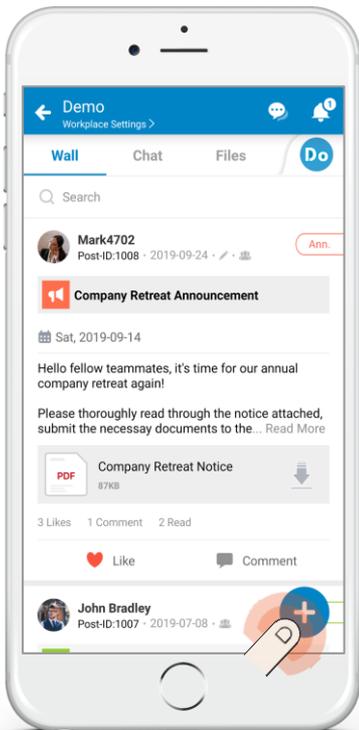
Access a list of tool to within the current workplace, group or buddy.

4. Quick Tool

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

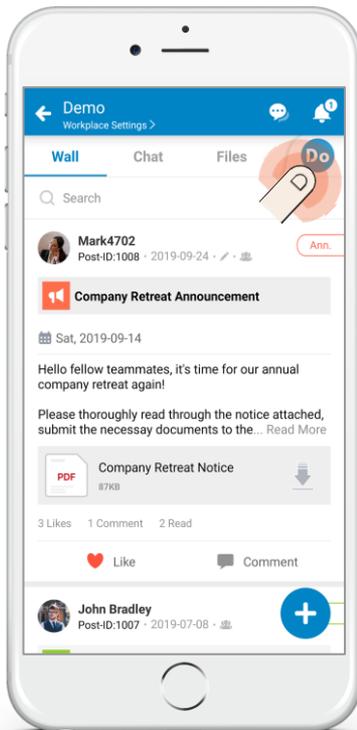
5. + Create New

1.6 Compartmentalized Information



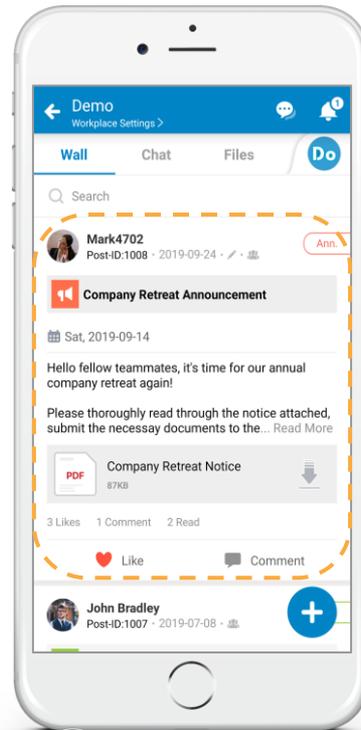
02a Add with +

OR



02b Tool switch with Do

OR



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](#)

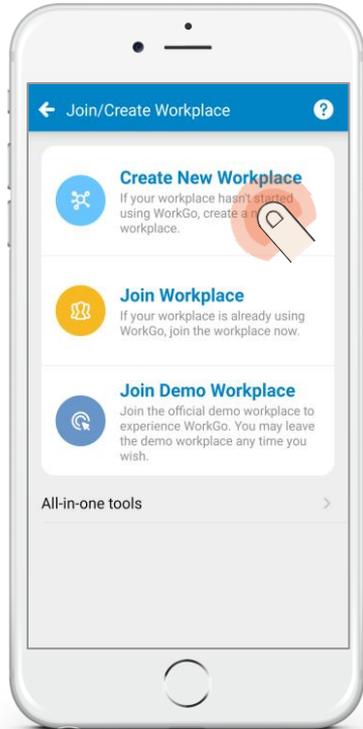
2.2 [Create Workplace \(Free Email Domain\)](#)

2.2.1 [Members Invite](#)

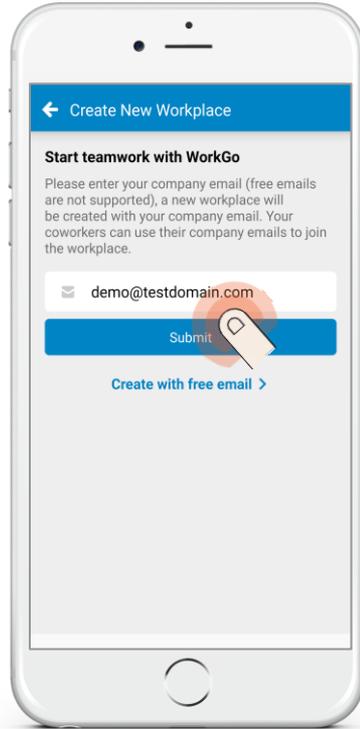
2.1 Create Workplace (Company Email Domain)

- Accounts bind with company email for secure access control.

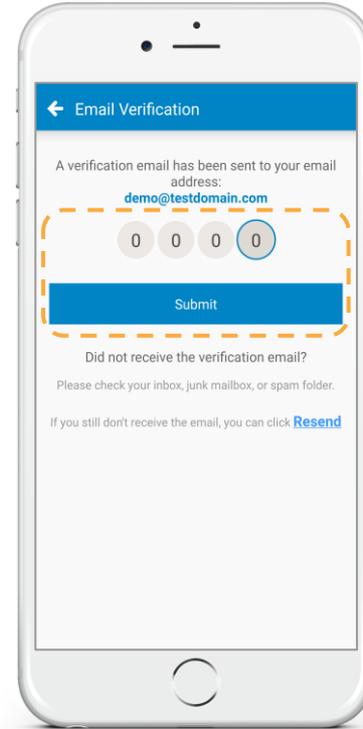
2.1 Easy On Boarding Process with Company Email Domain



01 Create workplace

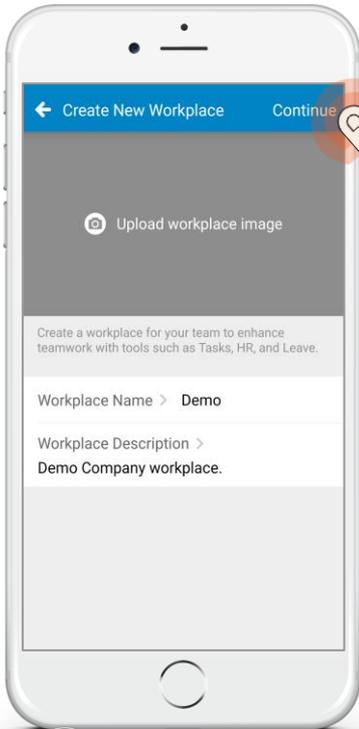


02 Input domain email



03 Input verification code

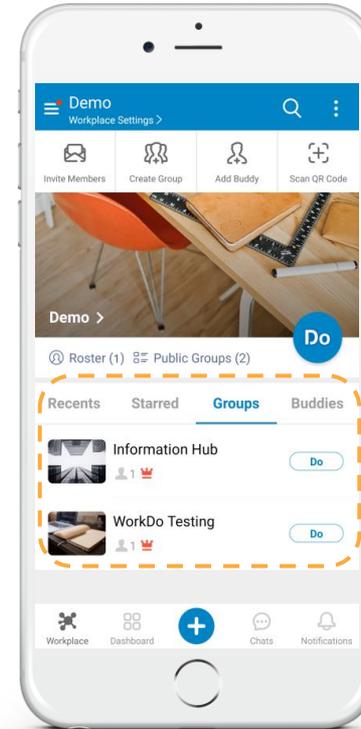
2.1 Create Workplace via Company Email Domain



04 Name your workplace



05 Later (Member Invite)



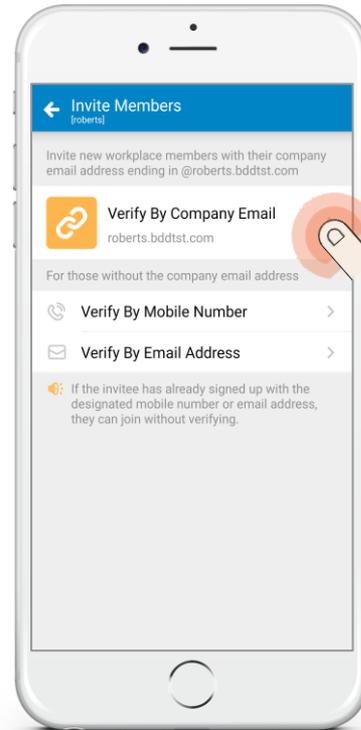
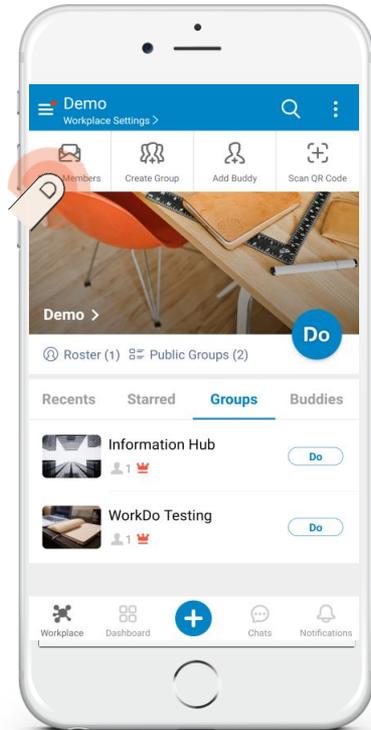
06 Done!

2.1.1 Member Invite

Via Company Email Domain

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

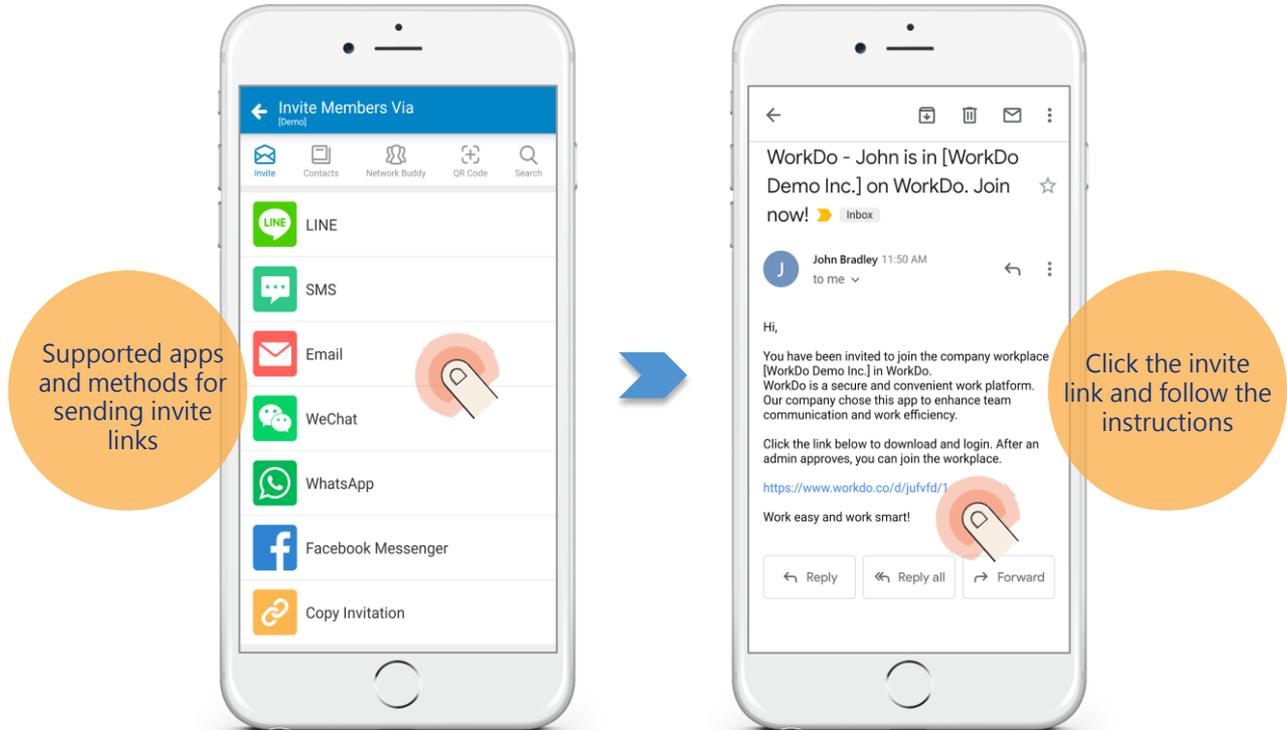
2.1.1 Member Invite (Via Company Email Domain)



01 Invite members

02 Invite methods

2.1.1 Member Invite (Via Free Email Domain)



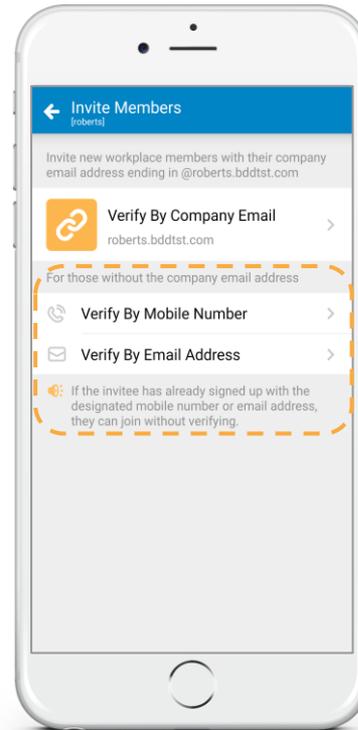
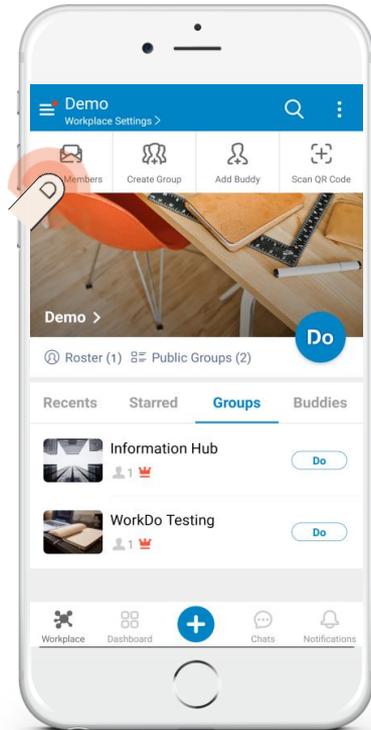
03 Select

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.

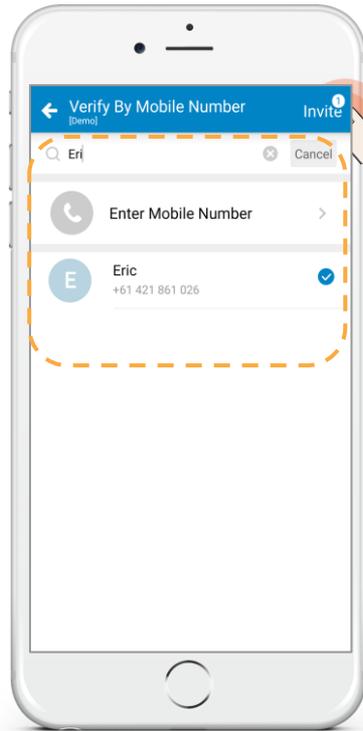
2.1.2 Member Invite (Without Company Email Domain)



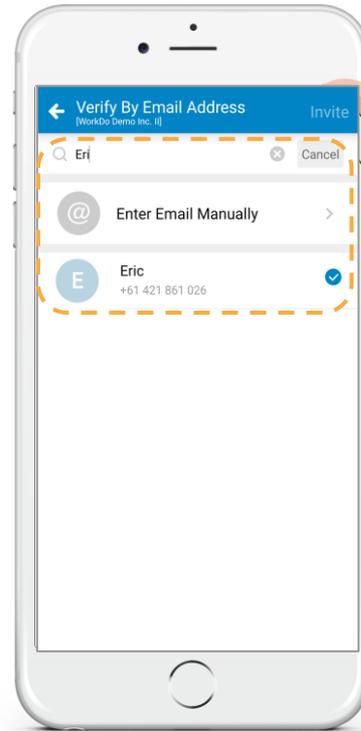
01 Member invite

02 Link generation methods

2.1.2 Member Invite (Without Company Email Domain)



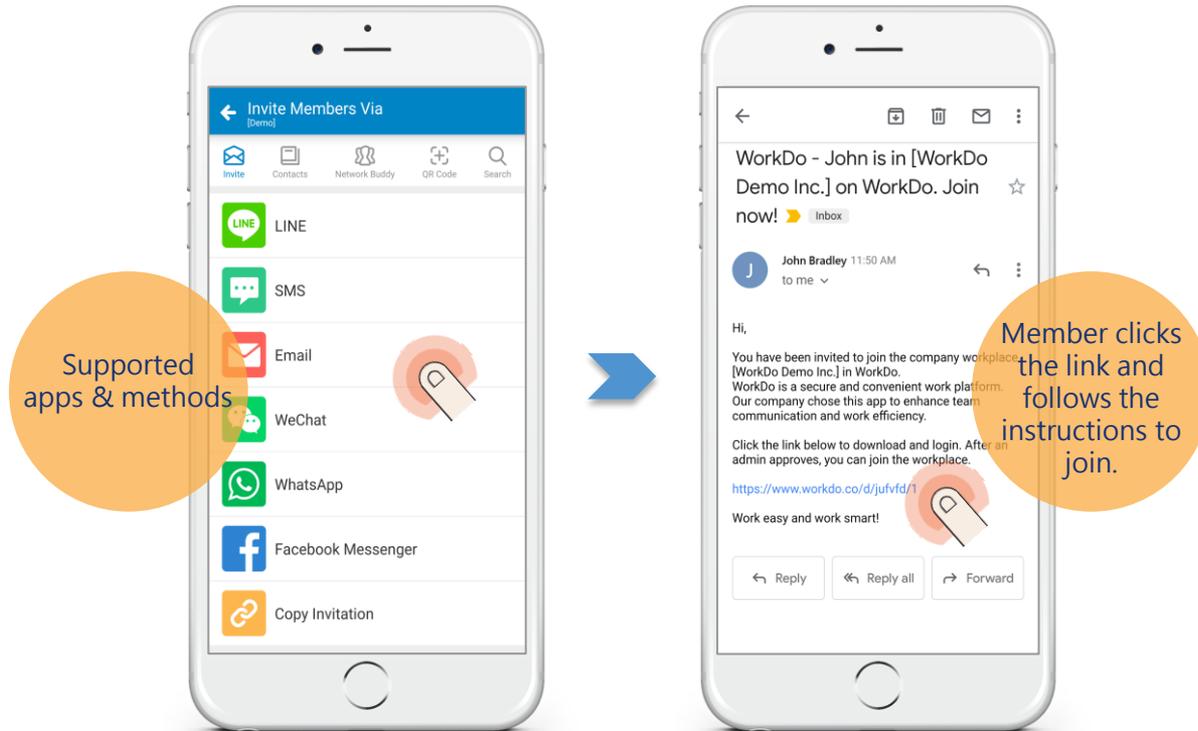
OR



03a Verify by mobile number

03b Verify by email address

2.1.2 Member Invite (Without Company Email Domain)



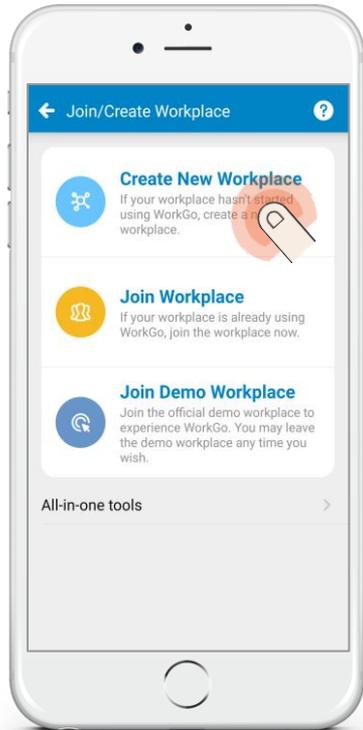
04 Select a method

05 Click the invite link

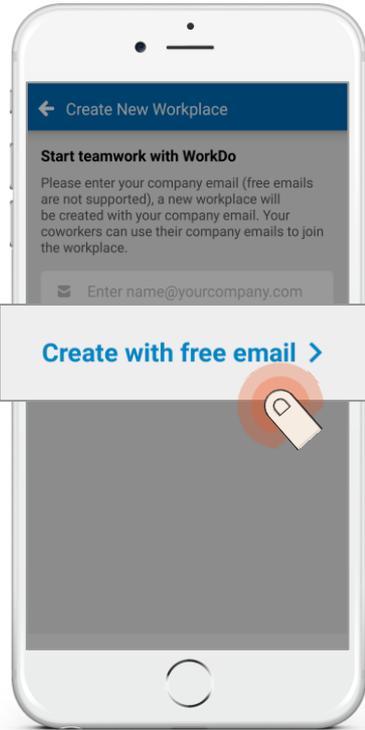
2.2 Create Workplace (Free Email Domain)

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

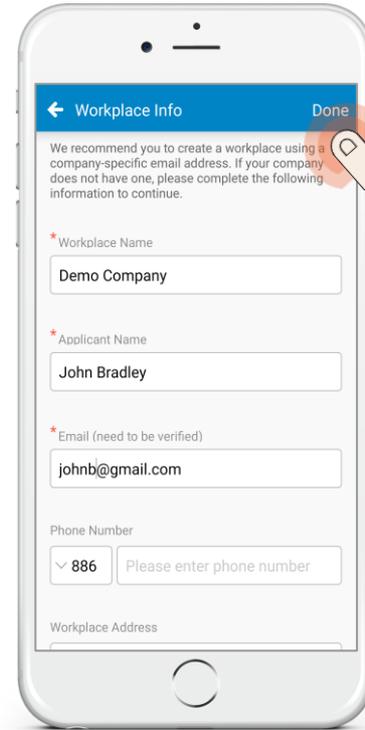
2.2 Create Workplace via Free Email Domain



01 Create workplace

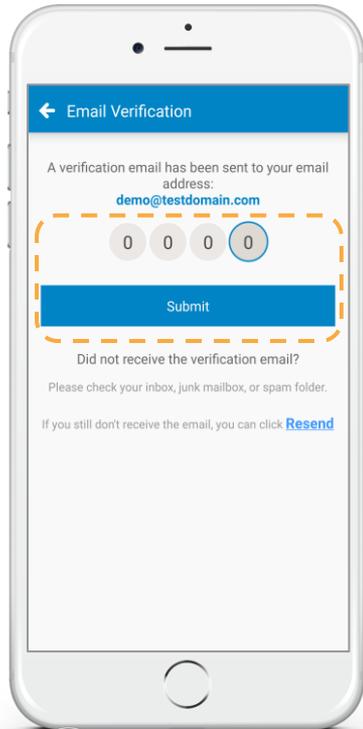


02 Create with free email

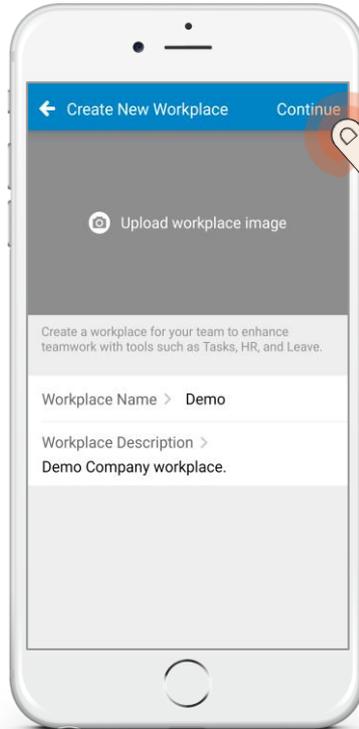


03 Input information

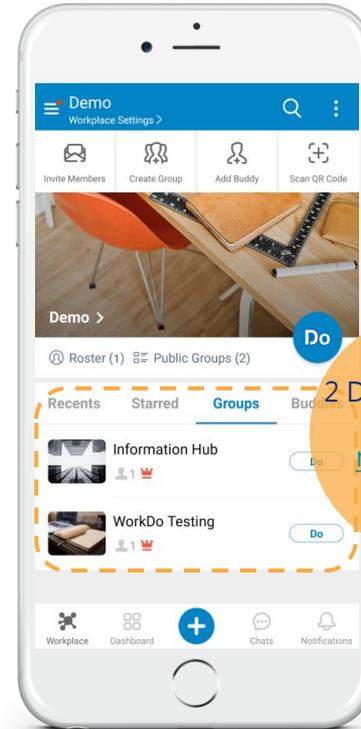
2.2 Create Workplace via Free Email Domain



04 Input verification code



05 Workplace info fill out

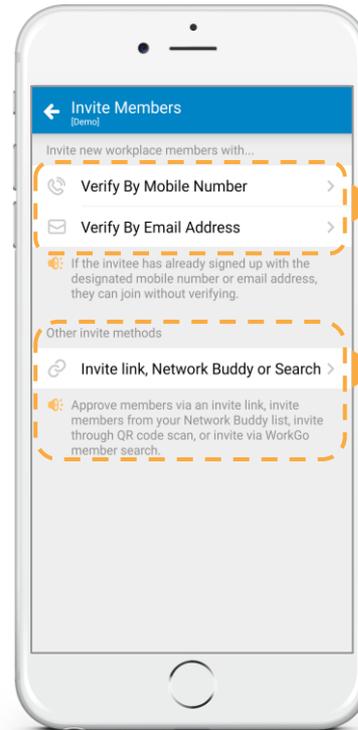
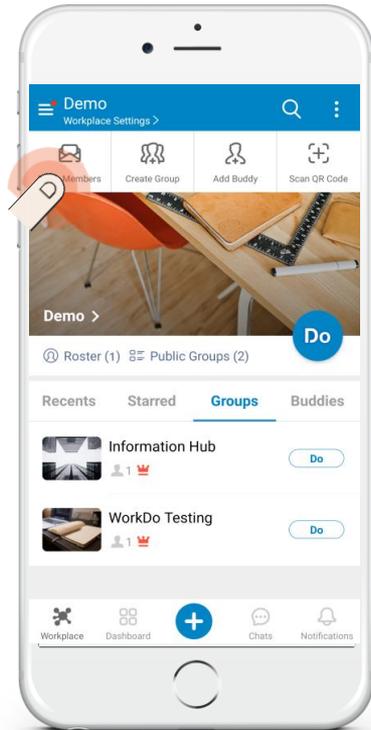


06 Workplace home screen

2.2.1 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)



Generates unique invite links

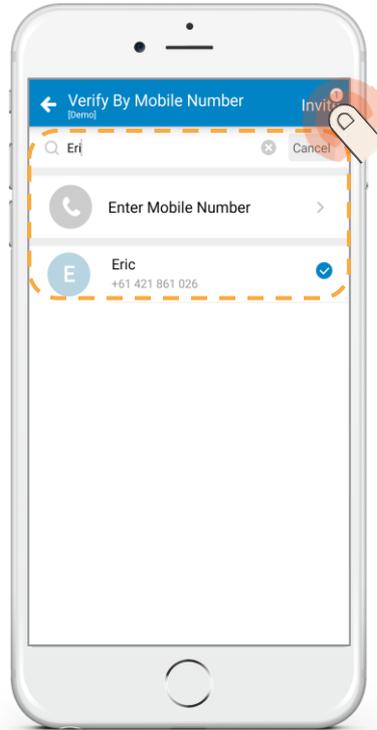
Generic invite link with admin approval required



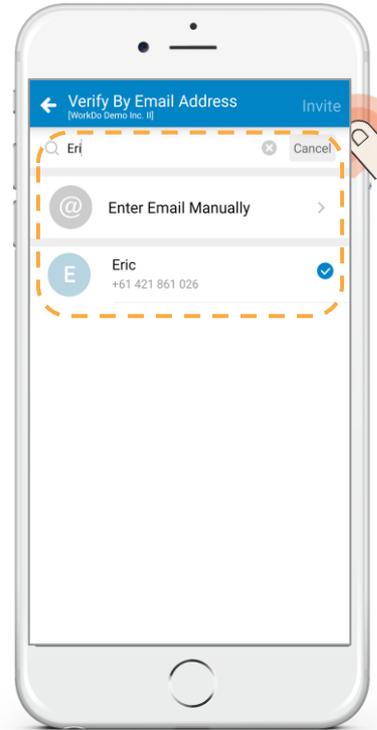
01 Member invite

02 Link generation methods

2.2.1 Member Invite (Via Free Email Domain)



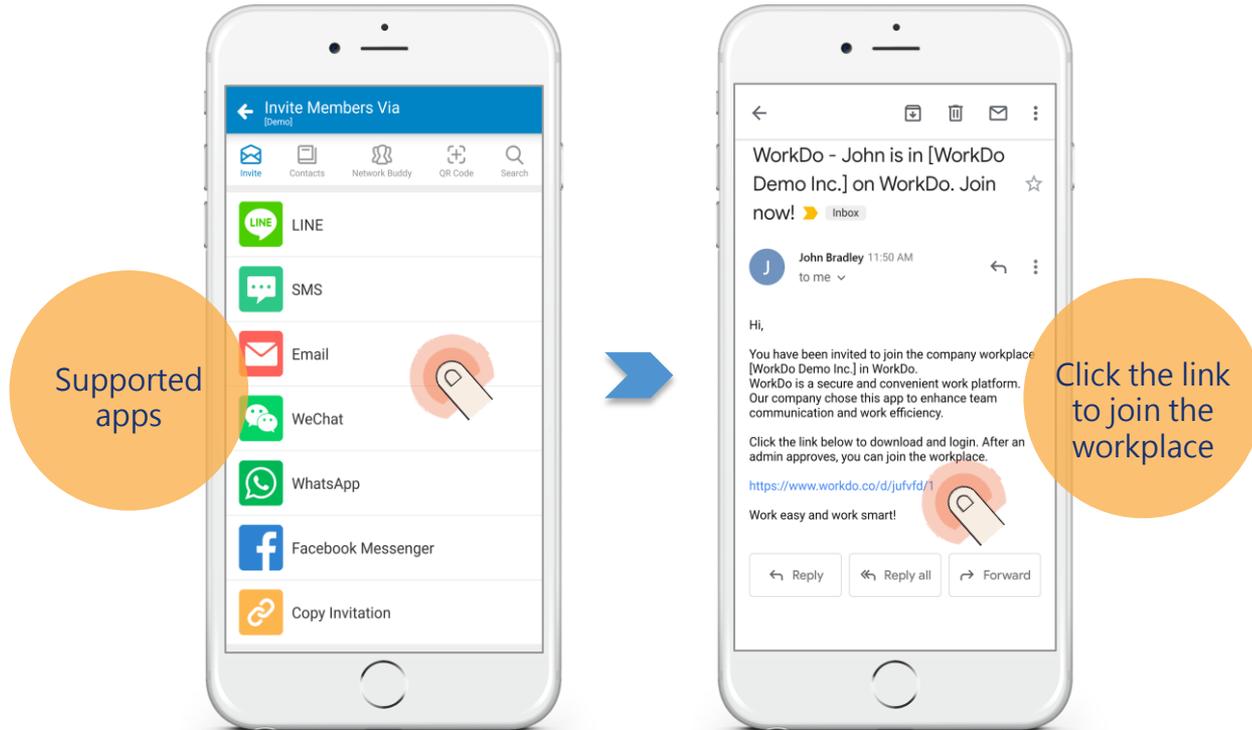
or



03a Mobile Number

03b Email

2.2.1 Member Invite (Via Free Email Domain)



04 Method select

05 Click invite link

3. Join Workplace

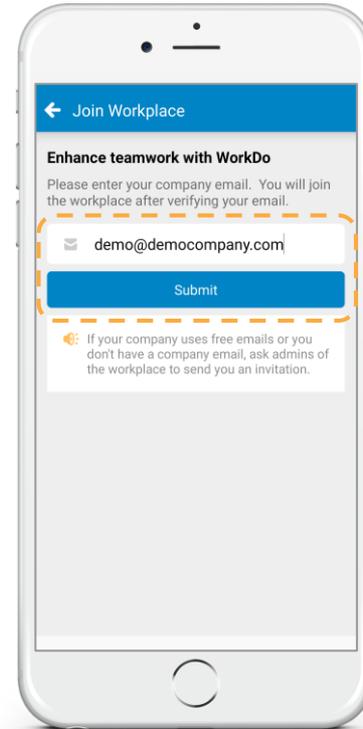
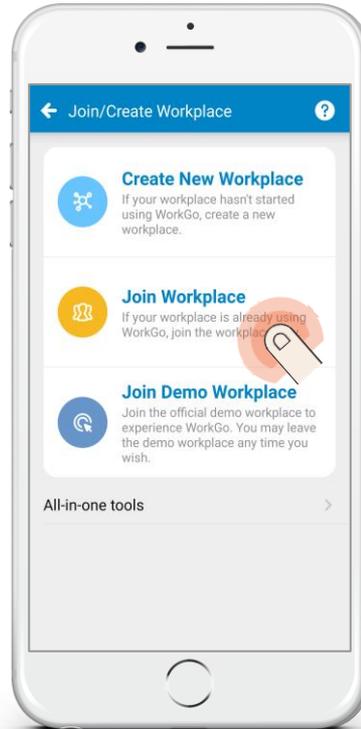
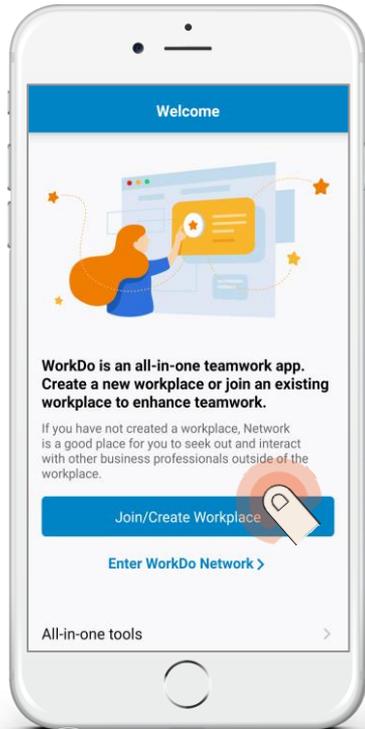
3.1 [Guided Sign Up](#)

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

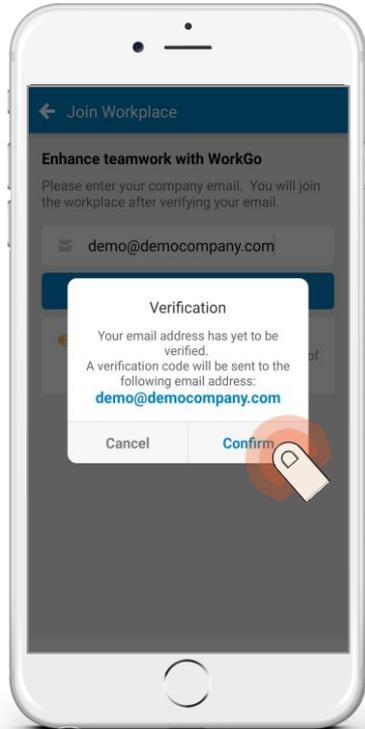


01 Join/create workplace

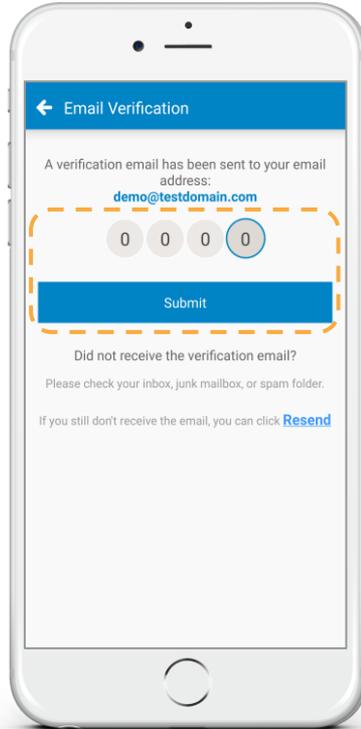
02 Join a new workplace

03 Fill out company email

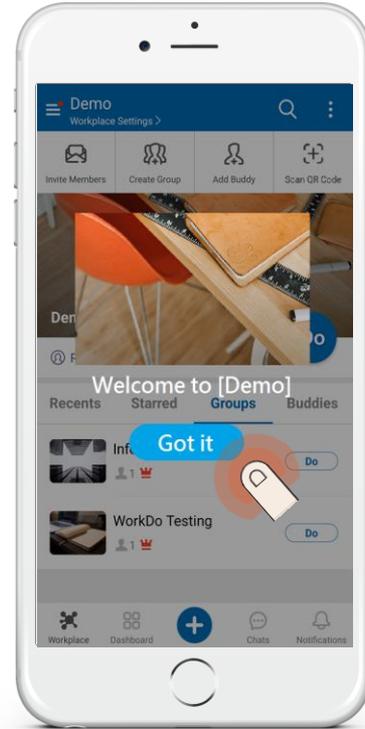
3.1 Guided Sign Up



04 Email confirmation



05 Enter verification code



06 Join workplace

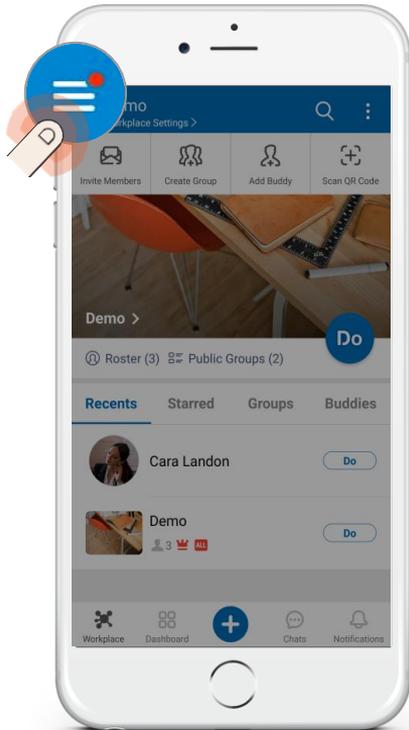
3.2 Self Sign Up

Join Other Workplaces

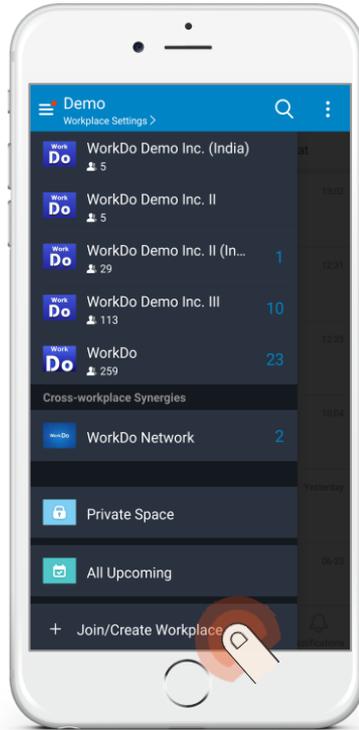
Workplace Set with Company Email Domain

User has a Company Email

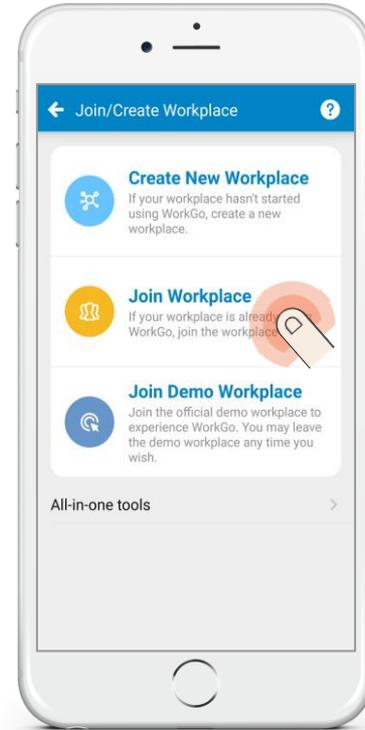
3.2 Self Sign Up



01 Workplace list

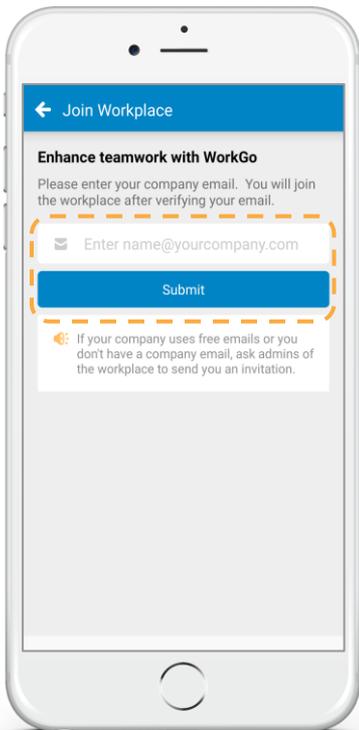


02 Join/create workplace

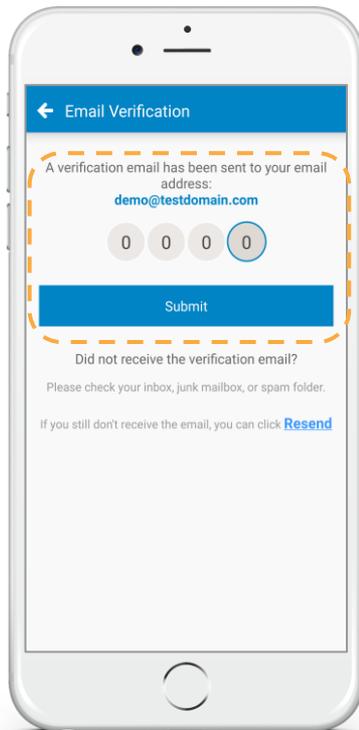


03 Join workplace

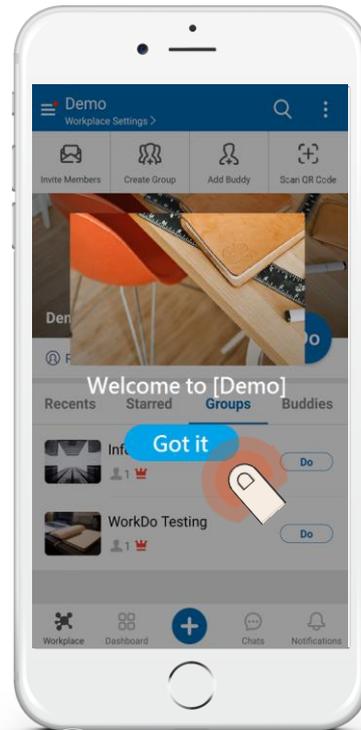
3.2 Self Sign Up



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](#)

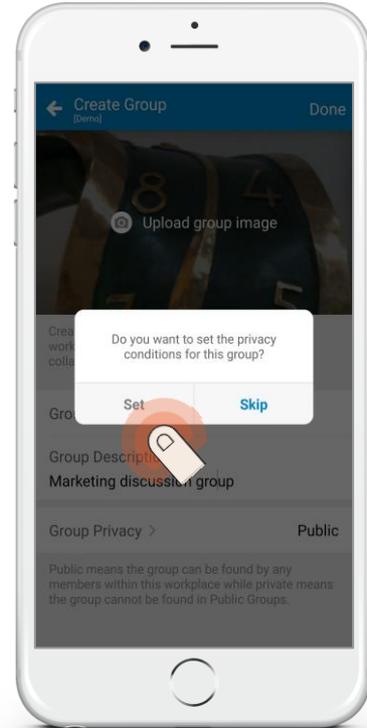
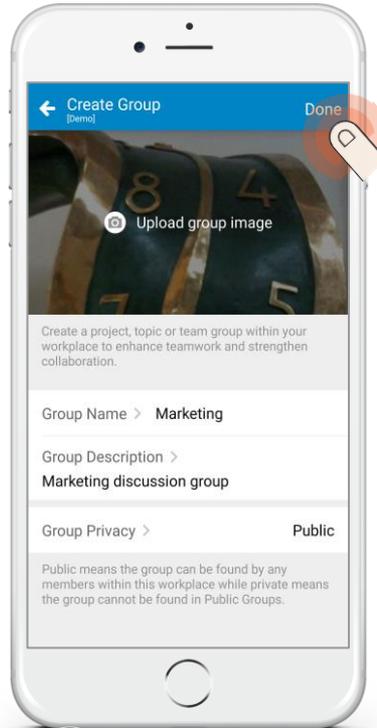
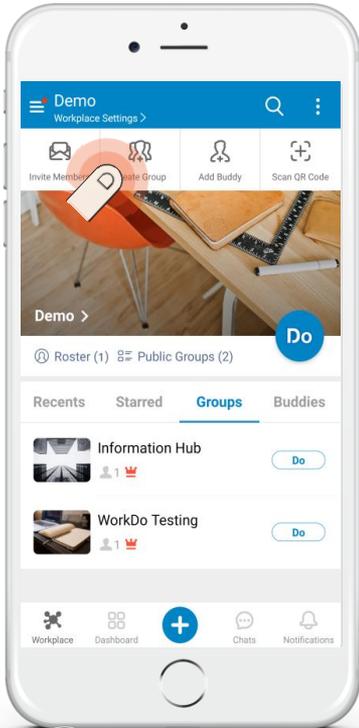
4.3 [Buddy Chat](#)

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

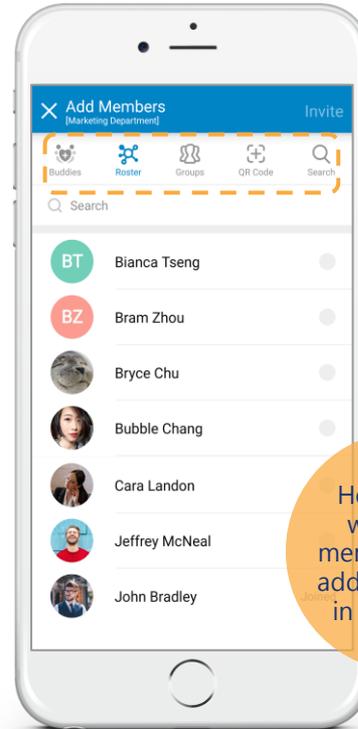
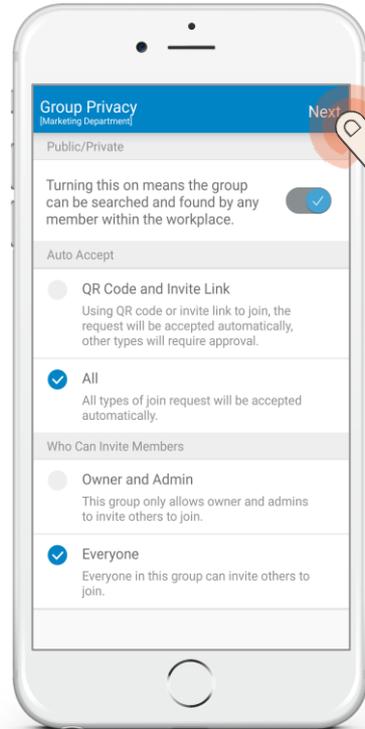


01 Workplace > create group

02 Group info > done

03 Privacy settings

4.1 Create Groups



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

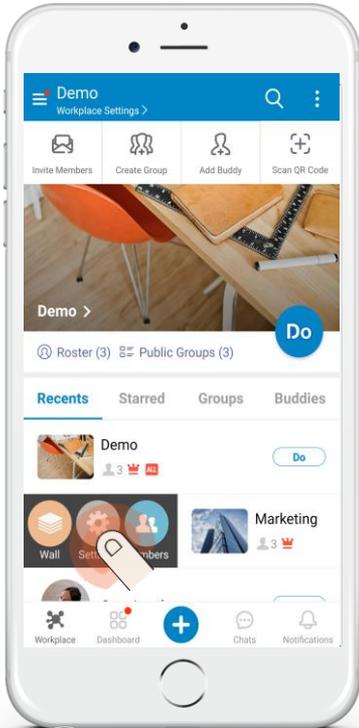
04 Privacy settings > next

05 Add member methods

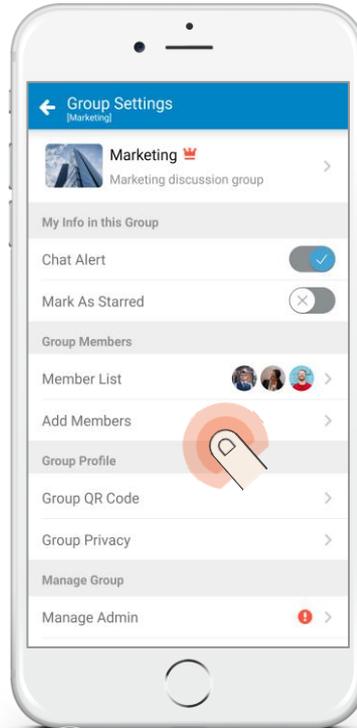
4.1.1 Groups – Add Members

Effective Group Conversations with a Focus.

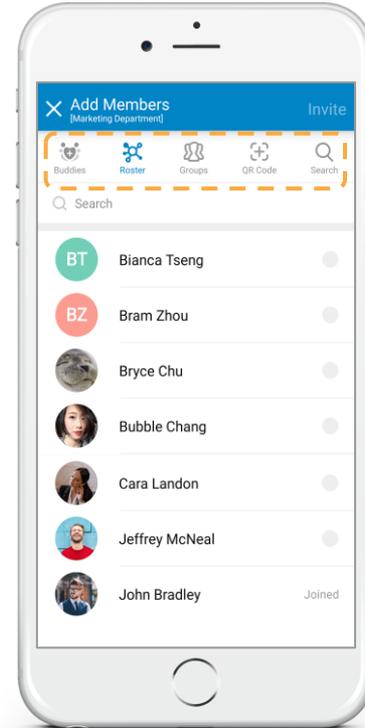
4.1.1 Groups – Add Members



01 Workplace > right swipe > settings



02 Add members

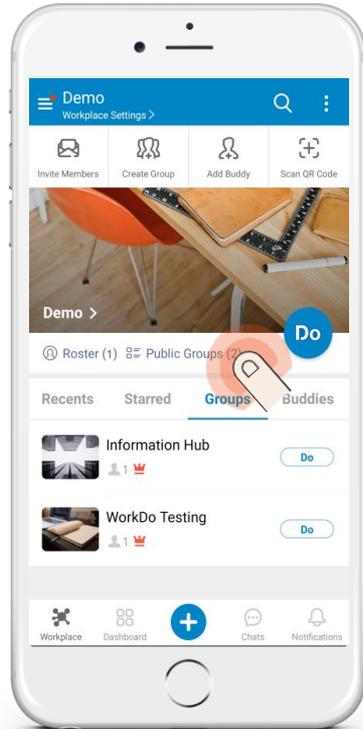


03 Add member methods

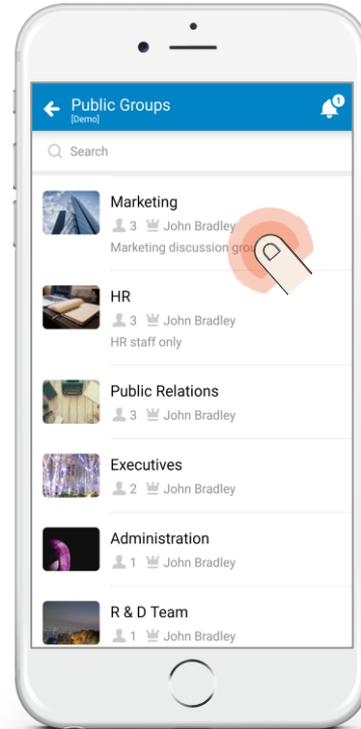
4.1.2 Join Groups

Small-Group Collaboration for Enhanced teamwork!

4.1.2 Join Groups

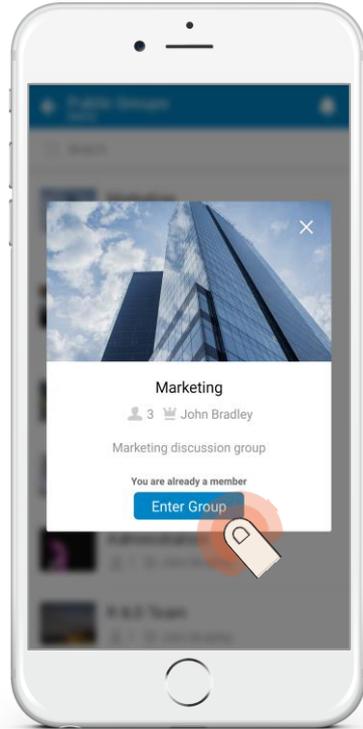


01 Workplace > public groups

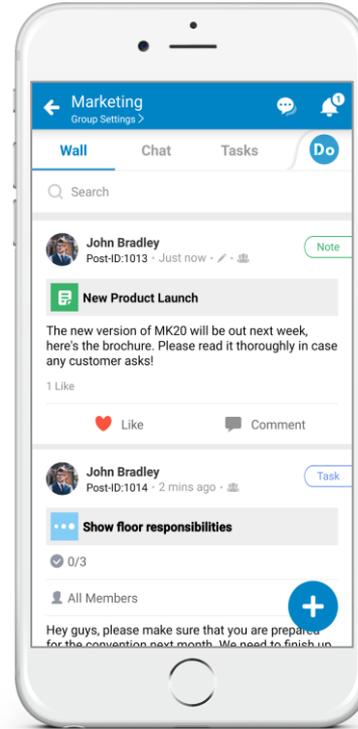


02 Select groups to join

4.1.2 Join Groups



03 Join

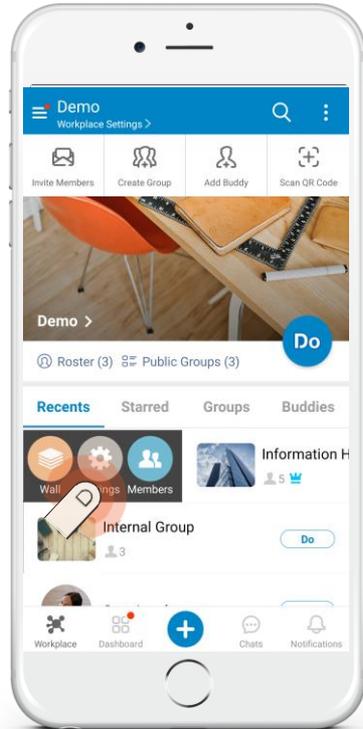


04 Group wall for recent activities

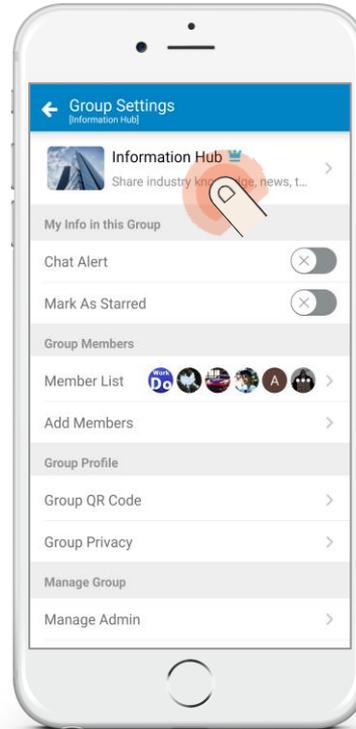
4.2 Default Groups

- ◉ 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

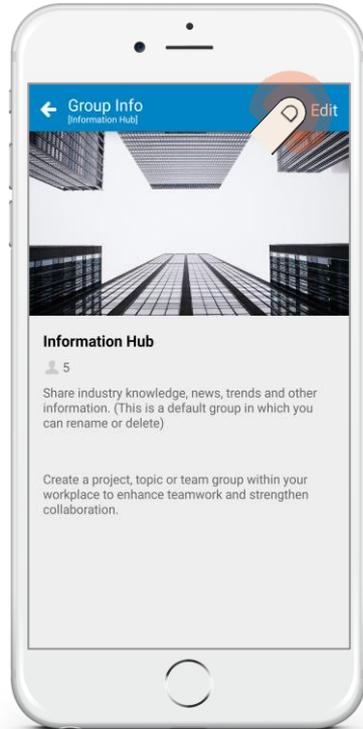


01 Workplace > right swipe
> Settings

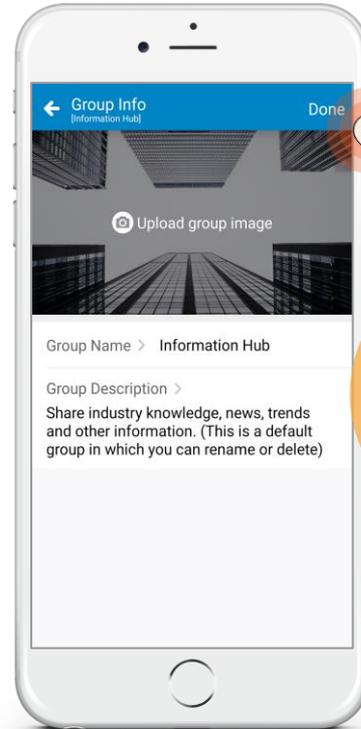


02 Change group name

4.2 Utilize the Default Groups



03 Edit



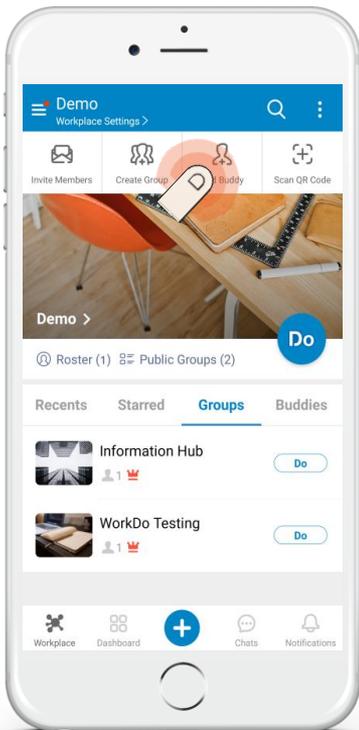
04 Complete

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

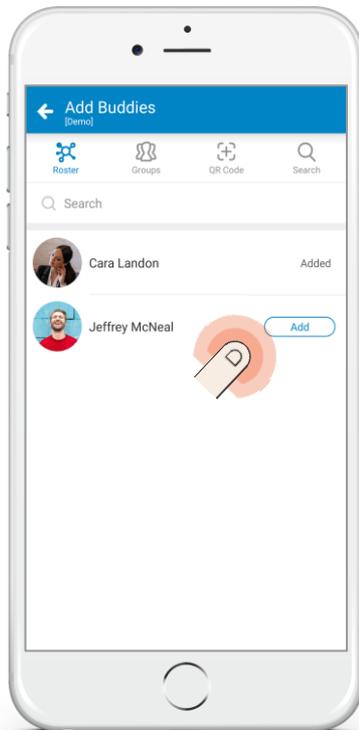
4.3 Buddy Chat

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

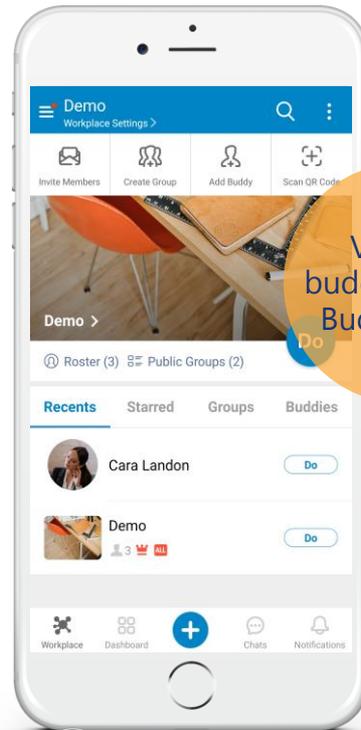
4.3 Buddy Chat: Add Buddies



01 Add buddies



02 Member select



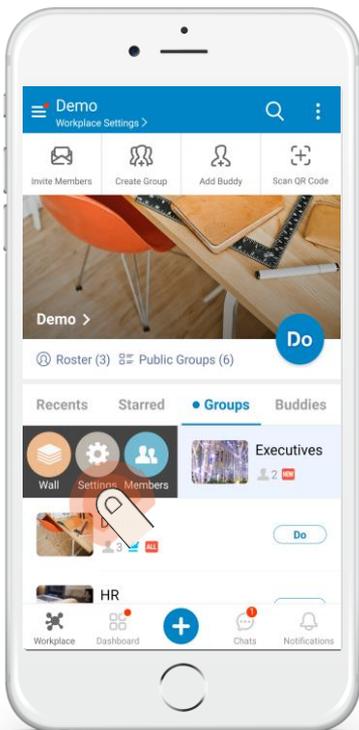
View all buddies in the Buddies List

03 New buddy added

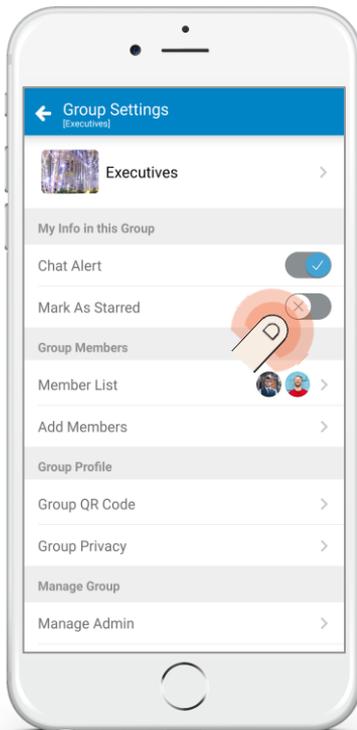
4.4 Tip: Set Favorites

- ◉ Set your favorite buddies and groups.

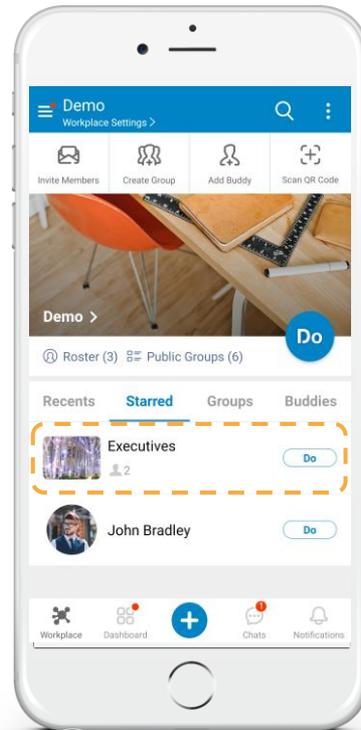
4.4 Tip: Set Favorites



01 Workplace > right swipe
> Settings

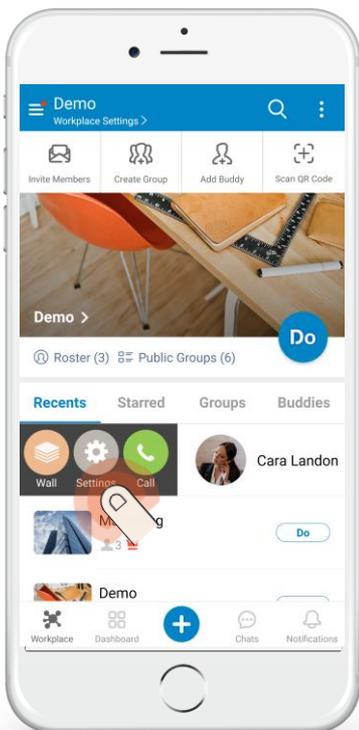


02 Mark as starred

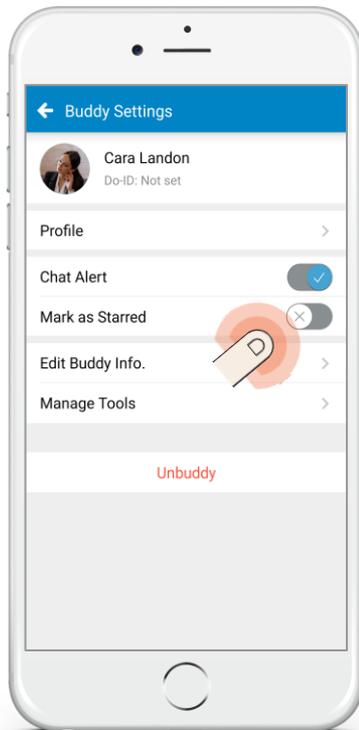


03 View starred list

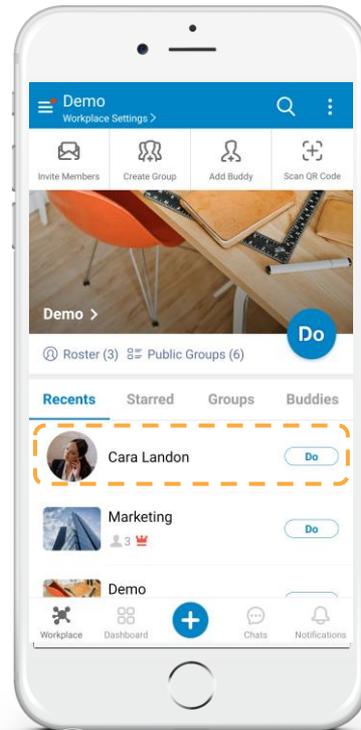
4.4 Tip: Set Favorites



01 Right Swipe > Buddy Settings



02 Mark as Starred



03 View Starred List

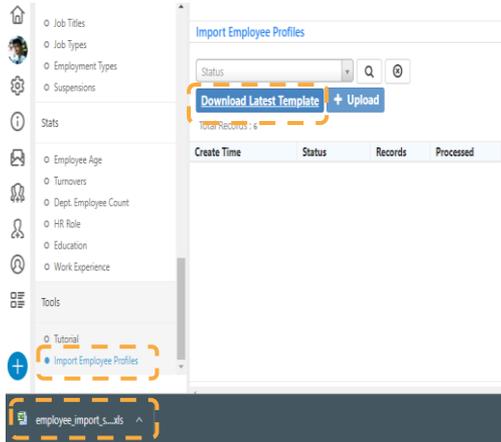
5. Organization Structure

5.1 [Employee Info Import](#)

5.1 Organization Structure : Employee Info Import

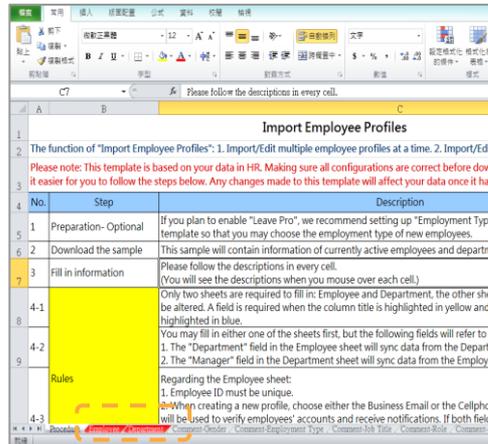
01

Import Employee Profiles >
Download Latest Template



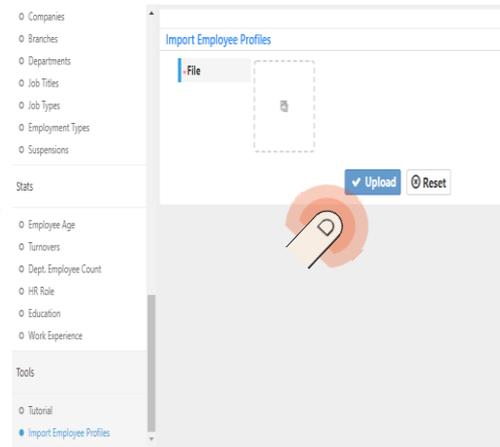
02

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 employee_import_simple_sample_en.xls | Create Time 2020-07-03 14:25

Employee Department

Skip Import Cancel Skip

	Error Message	Employee ID	Name	Department Name	Business Email	Cellphone No.	Employee Status
<input type="checkbox"/>	✓		Delores	Executive		+886987654321	Active
<input type="checkbox"/>	✓		Wayre	Public Relations		+886987654321	Active
<input type="checkbox"/>	✓		Joyce	Human Resources		+886987654321	Active
<input type="checkbox"/>	✓		Rick	Research & Development		+886987654321	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"/>	✓		Wayre	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

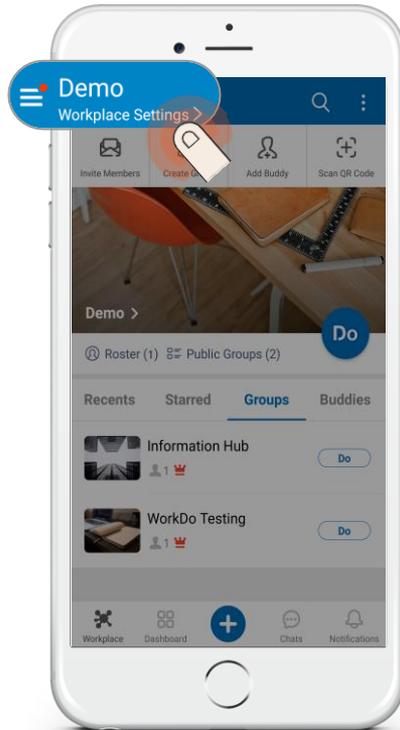
- ◉ Workplace/group admins = owner + admins
- ◉ Owner & admins are responsible for all the settings.
- ◉ Only the owner is allowed to change ownership and group deletion.

6.1 Admin Permissions



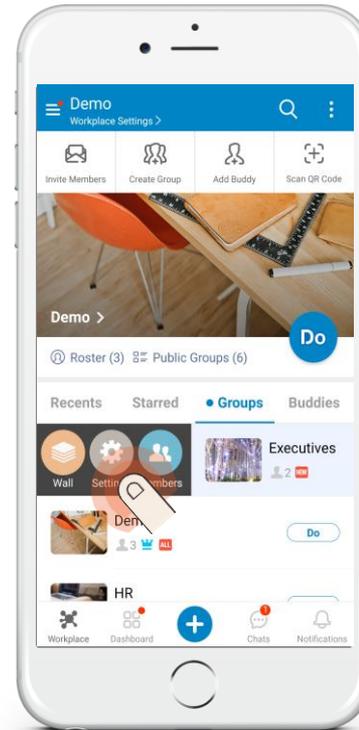
Permission	Workplace/Group Owner	Workplace/Group Admin	Tool Admin
Delete Workplace/Group	●		
Ownership Transfer	●		
Maintain Settings	●	●	
Tool Activations	●	●	
Member Role Change	●	●	
Maintain Tool Data			●

6.1 Add Admins to Manage the Workplace/Group



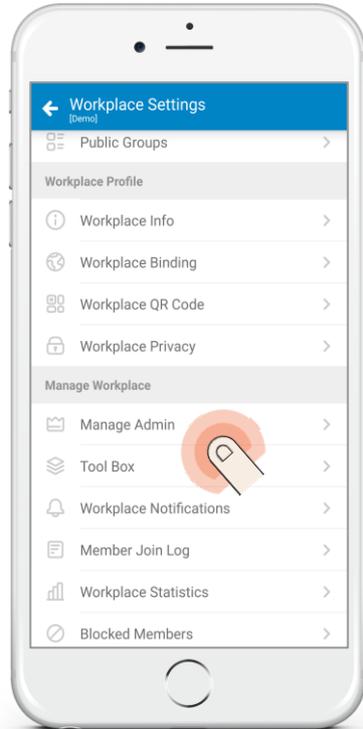
01_a Workplace Settings

Workplace and group share the same following steps

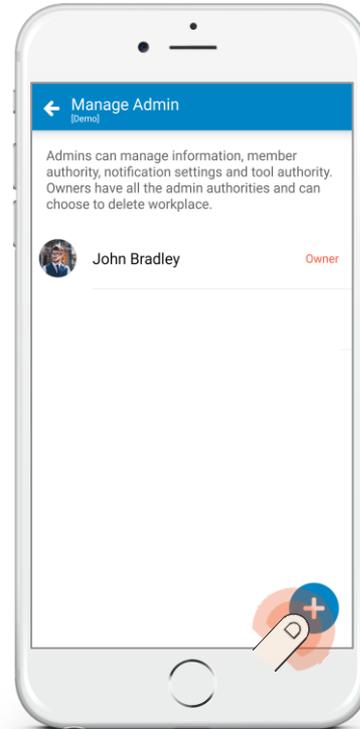


01_b Right swipe > Group Settings

6.1 Add Admins to Manage the Workplace/Group



02 Manage Admin

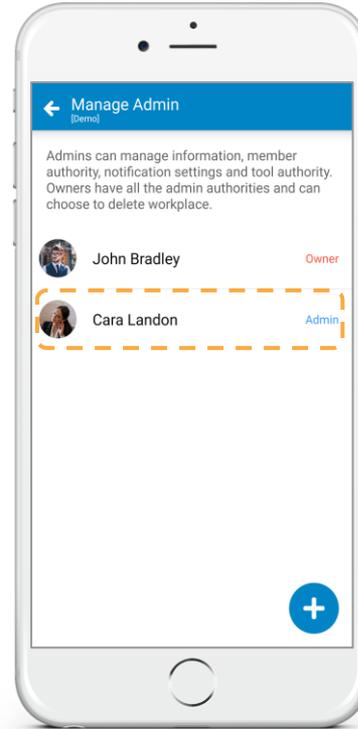
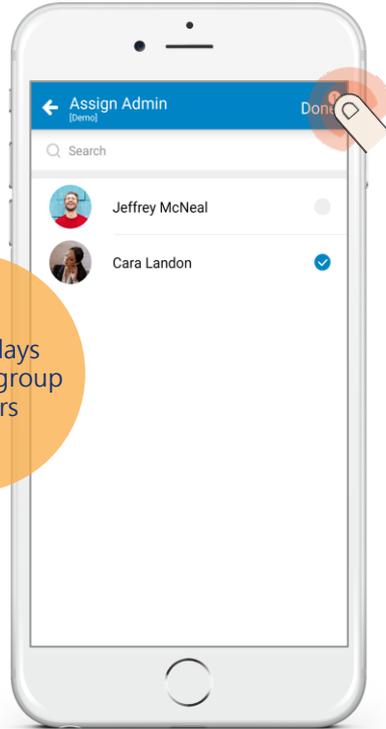


03 Assign



6.1 Add Admins to Manage the Workplace/Group

Only displays workplace/group members



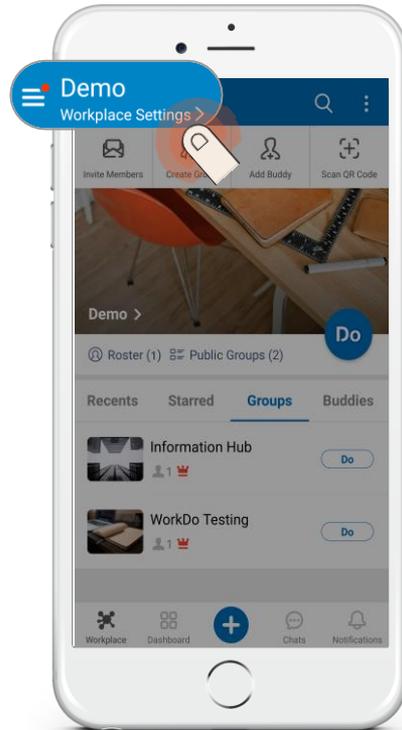
04 Member select

05 Complete!

6.2 Privacy Settings

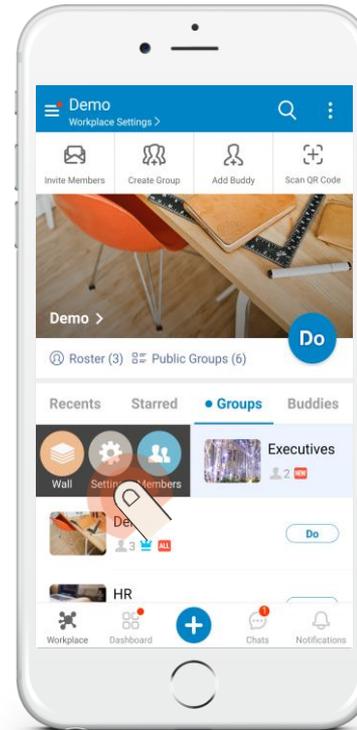
- ◉ Available for Workplace/Group.
- ◉ Read Carefully Before Changing the Settings.

6.2 Change Privacy Settings



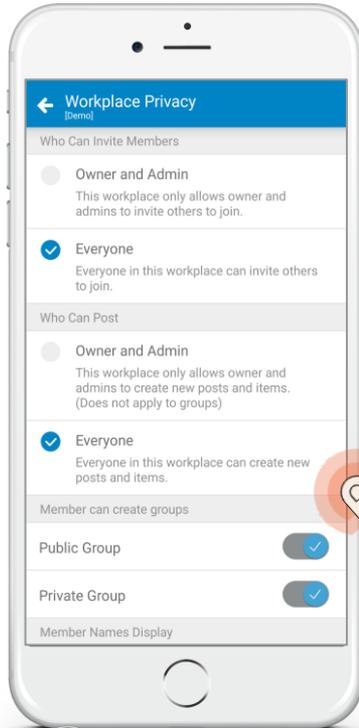
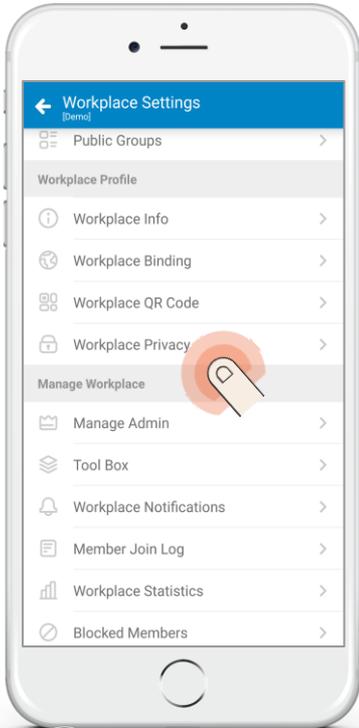
01_a Workplace Settings

Different privacy settings for Workplace/group

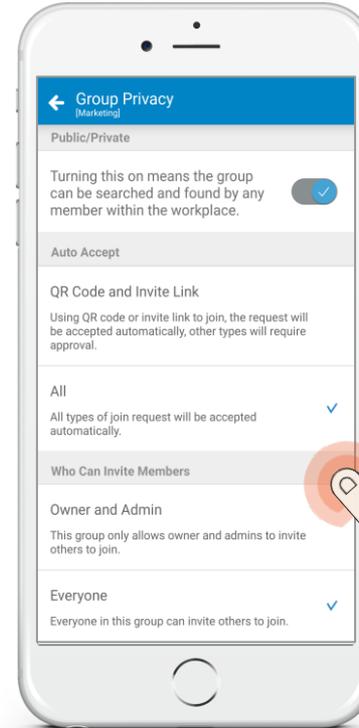


01_b Right Swipe > Group Settings

6.2 Change Privacy Settings



OR



02 Privacy

03a Workplace Privacy Settings

03b Group Privacy Settings

6.3 Tool Dependency

Dedicated Tools for Workplace / Group / Buddies

Different Levels, Different Tools

Improved Workflow Achieved with Tool Binding

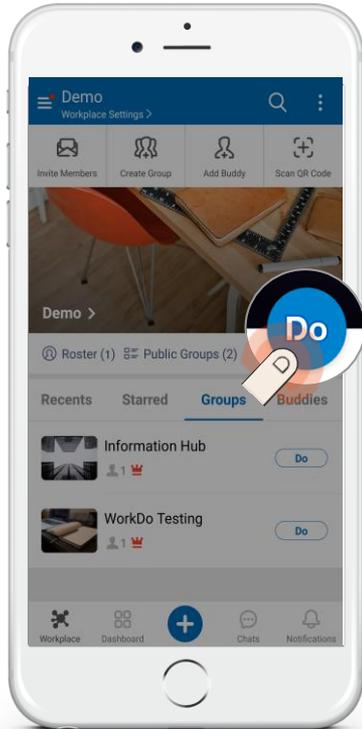
6.3 Tools at Each Level

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

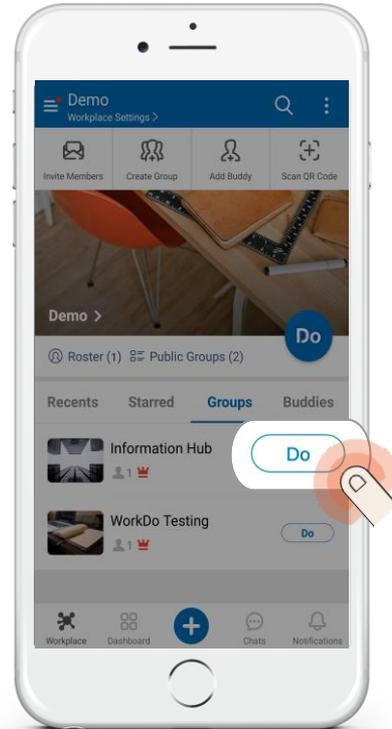
Different Tool Roles (Authorizations) for Different Members
Compartmentalized Information Management

6.4 Tool Activation & Tool Role Change



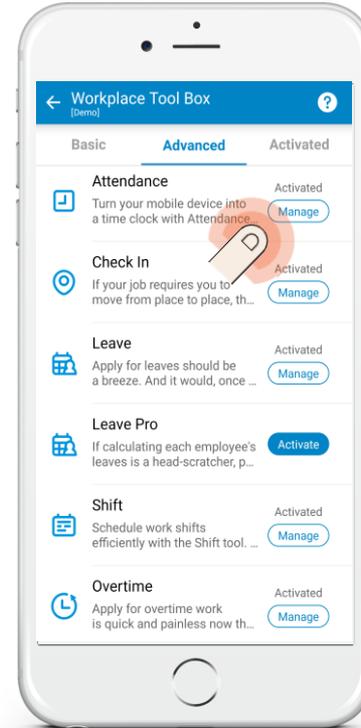
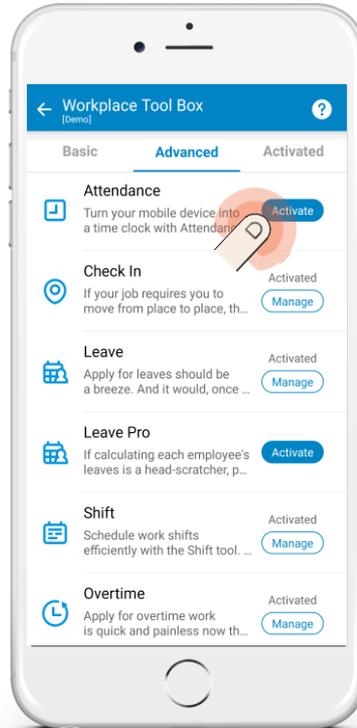
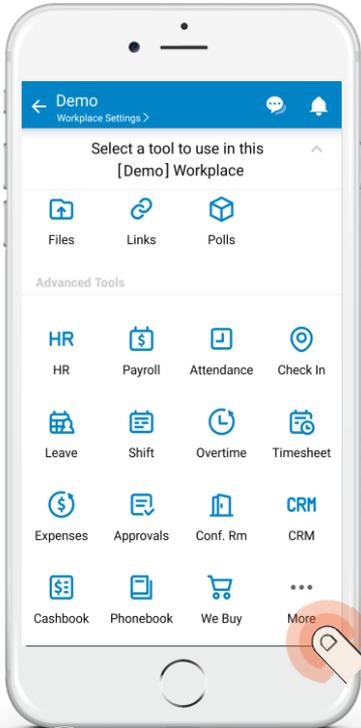
01_a Workplace > Do

There is a tool box for workplace, groups, buddies



01_b Workplace > Groups / Buddies > Do

6.4 Tool Activation & Tool Role Change

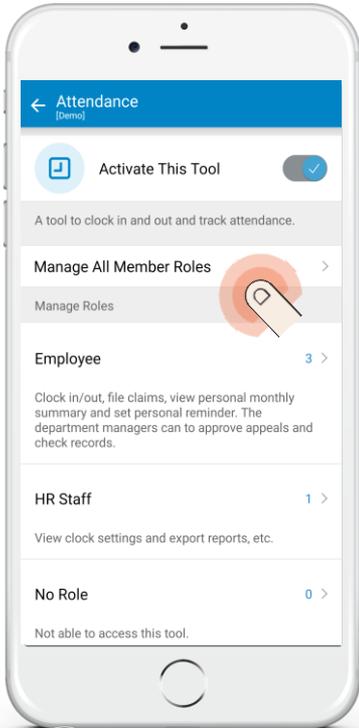


02 Workplace Toolbox

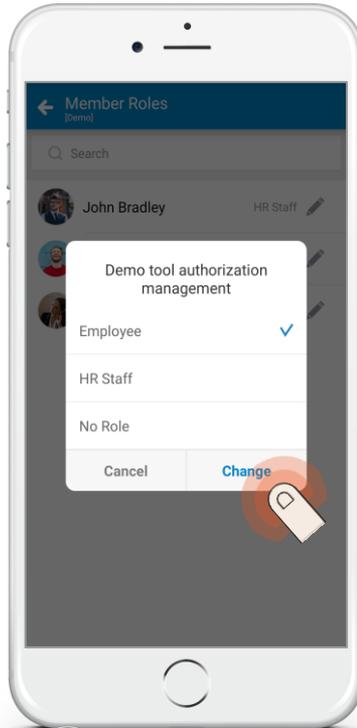
03 Advanced > Activate

04 Manage

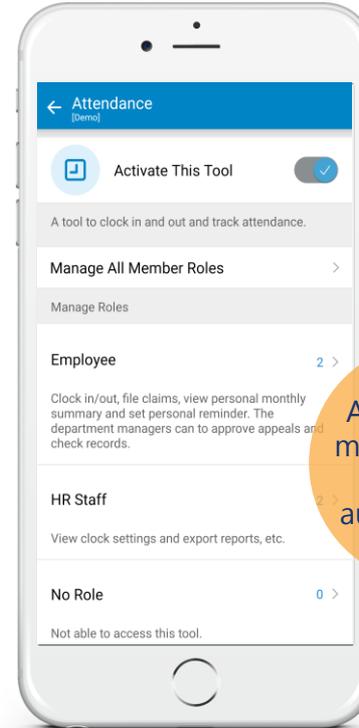
6.4 Tool Activation & Tool Role Change



05 Manage All Member Roles



06 Select a New Role > Change

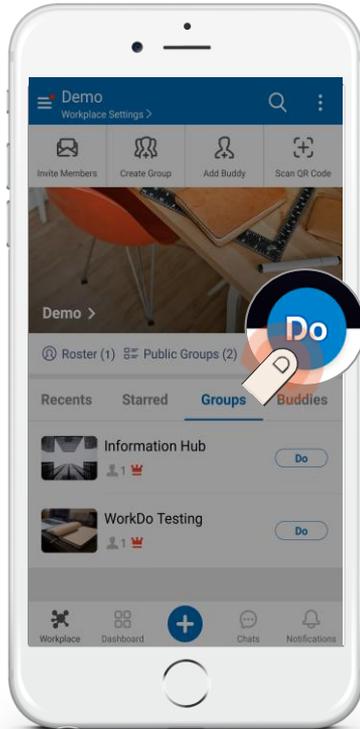


07 Done!

6.5 User Guide Download

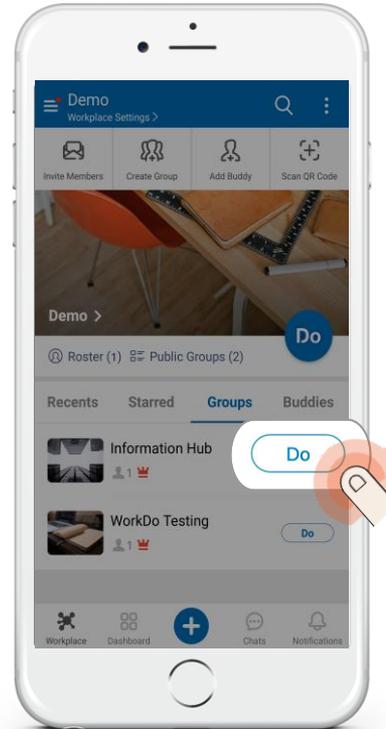
The User Guides Contain Everything You Need to Know!

6.5 User Guide Download



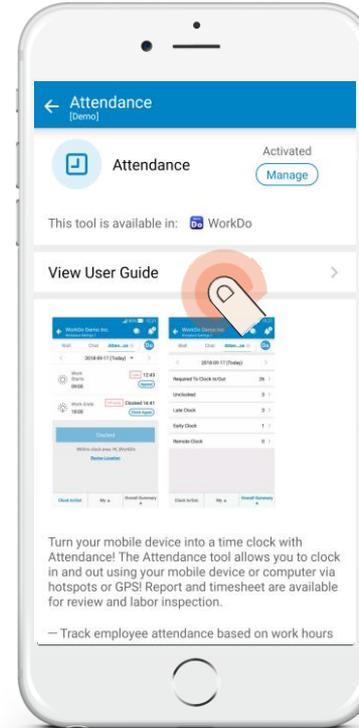
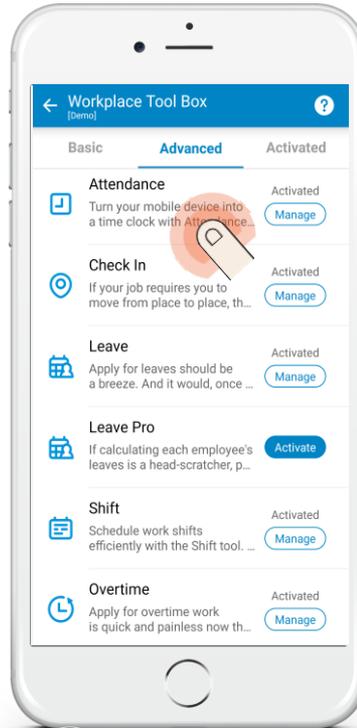
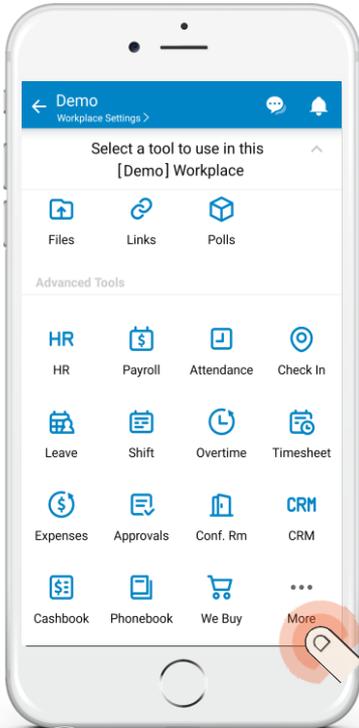
01_a Workplace > Do

Same rule applies to the workplace, groups & buddies



01_b Workplace > Groups / Buddies > Do

6.5 User Guide Download



02 Workplace Toolbox

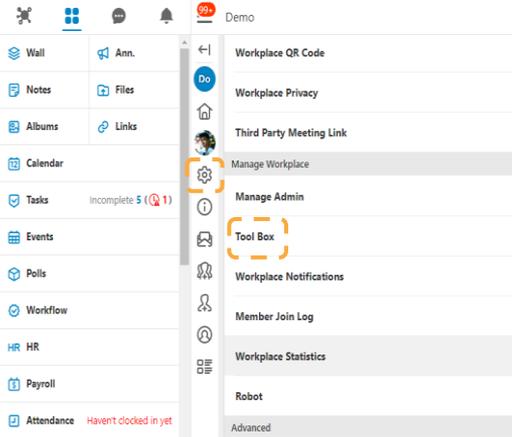
03 Select a Tool

04 View User Guide

6.5 User Guide Download - Web

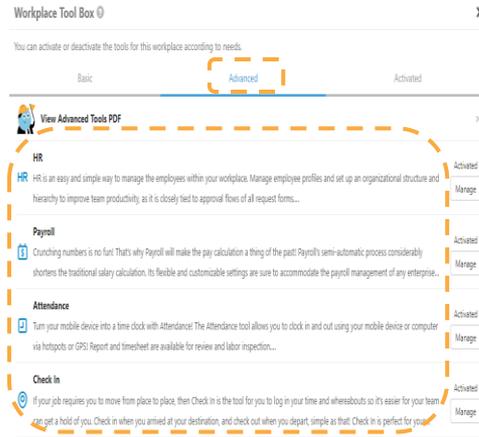
01

Click Workplace Settings > Tool Box



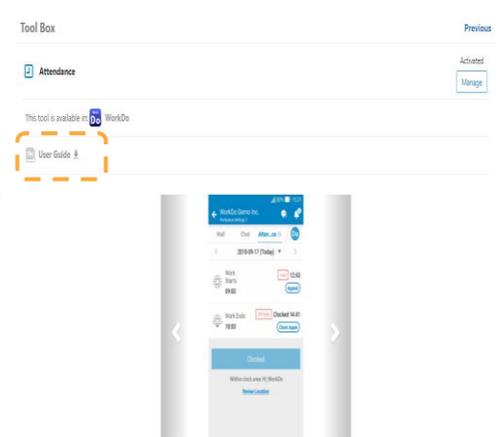
02

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 !



www.workdo.co/en



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