

Get Collaborative

OneDesk allows you to create teams and collaborate with colleagues, offsite team members, partners and customers. In this OneDesk Quick Start Guide we'll teach you how to build your OneDesk team in three ways. We'll also introduce you to some important concepts in OneDesk, like ShareSpaces which are the essential building blocks for all teams and projects.

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INSIDE YOUR ORGANIZATION

Advantages: By adding organization users to your OneDesk account, you can collaborate with colleagues and ensure your whole company is on the same page. When you sign up for a free OneDesk account, you can **add two free users** to your organization.

Here's how:

- To add users individually **Go to Administration--> Organization users/roles-->Create a new user.**
- To add users from your Gmail, Hotmail or Yahoo Mail contacts **Go to Administration--> Organization users/roles-->Add from your contacts.**

Note: Only users with an Administrator role can add users to an organization.

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OUTSIDE YOUR ORGANIZATION

Advantages: With OneDesk, you can collaborate with other users by inviting them to join a ShareSpace. Within a ShareSpace, members are able to discuss, develop, and share information and manage feedback, requirements, issues, tasks and projects.

Here's how:

ShareSpaces can be shared either with users from your organization, or with external guests. After creating a ShareSpace, click on the share icon on the ShareSpace you wish to share.

- **Share your ShareSpace with external guests:** Search for them in OneDesk, import your address book, or simply enter their email addresses - They will be invited as external guests, and will NOT join your organization. (If they are new to OneDesk, they will be asked to create their own organizations).
- **Share your ShareSpace with users from your organization:** Just select the user from the drop-down list of users.

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INVITING CUSTOMERS TO YOUR ORGANIZATION

OneDesk allows you to invite customers and collaborate with them

Here's how:

- First, create your customers. **Go to Customers-->Create new customer.**
- Then, you must invite them in order for them to get a registration e-mail. To invite your customer, click **send invitation**

Note: The customer will receive a registration e-mail, inviting them to provide feedback. They simply need to click on the link in the e-mail to confirm their registration and proceed to the customer portal.