

W **WORKSTRAIGHT**

Thank you for opening a WorkStraight account!

This is a short guide to help you with your first steps with us.



STEP-BY-STEP TIPS AND MORE.

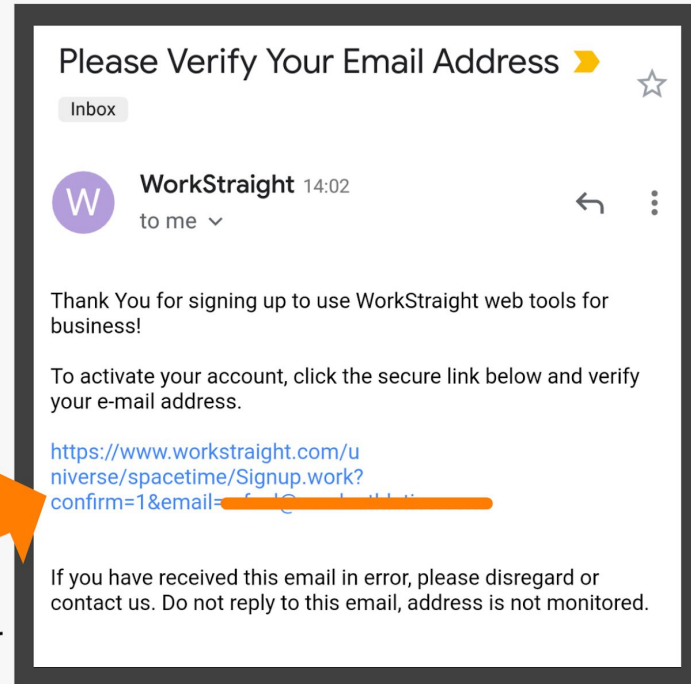
VERIFICATION EMAIL



After signing up for your free trial, you will receive a verification email.

If you don't see the verification email in your inbox make sure to review your spam or junk folder.

Click on the link, that will verify your email address.

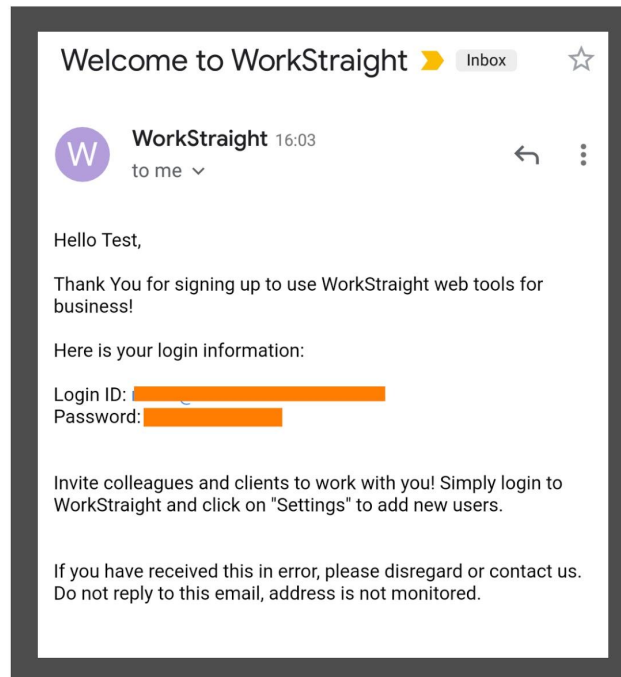


LOGIN CREDENTIALS



After verifying your email address, you will receive an email with your login credentials to access your WorkStraight Account.

We recommend you change your password. You simply need to go to Settings > Security Settings > Edit your password.



HOW TO ADD A NEW USER?



Settings

Go to work order...

Go

[My Info](#)

Edit your name, login id, email, timezone, etc

My Settings

[Security Settings](#)

Edit your password and security question

My Settings

Notifications from

[Manage Users](#)

Add and delete users, resend passwords, etc

User Management

[Add New User](#)

Add a new user to your company account

User Management

[Delete User](#)

Delete a user from your company account

User Management

[Manage Groups](#)

View and edit company groups, including group members

Group Management

[Add New Group](#)

Create a group consisting of users in your company

Group Management

[Delete Groups](#)

Delete a group configuration from your company

Group Management

[Company Info](#)

Manage general company information

[Edit Logo](#)

Change the default software logo graphic

[Account Management](#)

Manage plan, billing, and close account

You need
to go to
Settings
> Add
New User



Add New User

Go to work order...

[Back to Settings](#) / [Manage Users](#)

Fields marked * are required

If given WorkStraight system access, the new user will be notified via email that you have added them to your company's WorkStraight account. New user will have to click on the link in the verification email before becoming an active user.



*** Name:**

Enter new user's name.

*** Time Zone:**

Select the new user's U.S. local time zone. This may be changed by the user.

[Click here to give user WorkStraight system access](#)

Group:

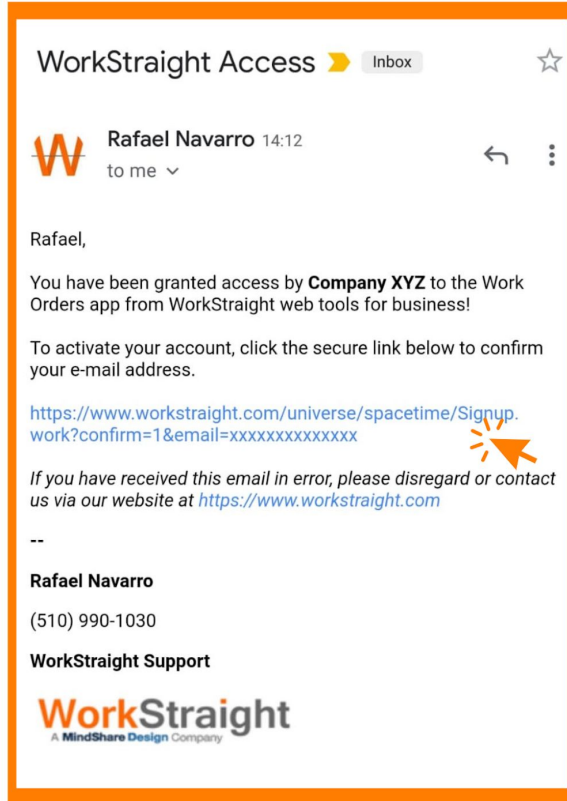
The groups that comprises your organization. This can be changed later. (Optional)

Position:

User's position or title. (Optional)

After clicking on Settings
> Add New User.
You will be able to enter
your user's info.

USER CONFIRMATION EMAIL



After entering your user's information, they will receive a confirmation email.

New users will need to click on the link, to receive their login credentials.





Rafael Navarro Administrator

Dashboard

Go to work order...

Go

Message From Rafael Navarro: Thu Jul 12, 2018 2:53 PM

Welcome to WorkStraight!

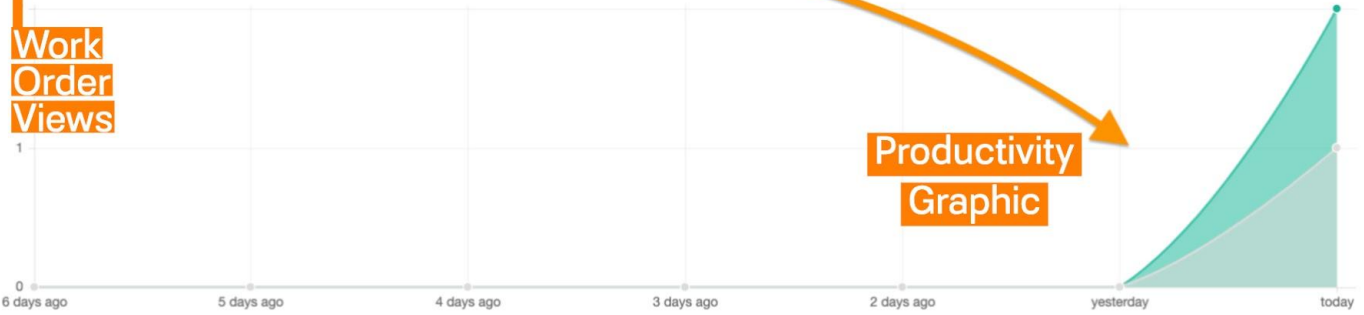
Custom Message

- Dashboard
- Work Orders**
 - Assigned To Me
 - Created By Me
 - Awaiting Assignment
 - Awaiting Approval
 - All Work Orders
 - All Open
 - All Closed
 - All Declined
 - All Invoiced
- Calendar
- Customers
- Invoices
- Assets
- Reports
- Company Directory
- Settings
- Help Center
- Create Work Order

Work Orders Daily Report

Work orders created (green) vs work orders closed (gray)

Total number of work orders created this week: 2
Total number of work orders closed this week: 1



Analysis of activity: Used to measure recent efficiency trends.

Updated on Thu Dec 26, 2019 4:23 PM

Tasks Created All-Time <h1>31</h1> <p>Last task created Wed Dec 18, 2019 9:56 AM</p>	Tasks Completed All-Time <h1>1</h1> <p>Last task completed Thu Mar 15, 2018 4:52 PM</p>	Activity On Tasks All-Time <h1>2</h1> <p>Last activity on task Thu Jun 27, 2019 12:34 PM</p>
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Awaiting Approval

Approver: [Cleaning](#)
 Rafael Navarro
 Created: Mon Mar 18, 2019 10:31 AM
 cleaning

Awaiting Assignment

Approver: [Test Graph](#)
 Rafael Navarro
 Created: Thu Dec 26, 2019 4:22 PM
 Test

HOW TO ADD A CUSTOMER?



WorkStraight Create Work Order Log out

Rafael Navarro
Administrator

Dashboard
Work Orders
Calendar
Customers
Invoices

1) Click on Customers, and go to "Add New Customers"

Go to work order... Go

View and Manage Customers

Click on the ID to view and manage Customers. [Click here to edit the term "Customers"](#)

Add New Customers [Sync With QuickBooks](#)

10 records per page Search:

ID	First	Last	Phone	Email	Login Access
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Add **Add Via CSV**

2) Enter your customers' information

Will **NOT** be notified in any way that you have added them, unless you choose to grant them Login Access.

Login Access:

Person will be notified via email that you have added them with **Tracker** permissions and will be able to login to track progress on their Work Orders. Person will have to click on the link in the confirmation email before receiving login credentials.

TIP: If you want your customers to be able to track their work orders check this box.

Name:

Enter first name. **At least one of the following are required:** first name, last name, email, or phone number.

CREATE A WORK ORDER



Fields marked **red** are required (Other fields will not display on work order if left blank)

 **Create Work Order**

Click on "Create a Work Order".

Title

Description of the service, what should be solved, work needed, etc.

Service Description

Enter Service

Make sure to fill in all the fields,
especially the ones in **RED**.
(since they are required)

Priority

Choose the problem level.

Assigned

Leave unassigned, assign to a single user, or multiple users.

CUSTOMIZATION



The screenshot shows the WorkStraight application interface. On the left is a dark sidebar with a user profile for Rafael Navarro, Administrator. Below the profile are menu items: Dashboard, Work Orders, Calendar, Customers, Invoices, Assets, Reports, Company Directory, Settings (highlighted with a red starburst and arrow), Help Center, and Create Work Order. The main content area has a white header with the WorkStraight logo and a hamburger menu icon. Below the header is a 'Settings' link highlighted with a red box. The main content area contains several sections: 'My Info' (Edit your name, My Settings), 'Manage Users' (Add and delete users, User Management), 'Manage Groups' (View and edit company groups, Group Management), 'Company Info' (Manage general company information, Company Management), and 'Customize WorkStraight' (Customize work order fields and names, enable QuickBooks, etc., Customize) which is highlighted with a red box.

Click on "Settings" on your left-side menu, go to "Customize WorkStraight".

CUSTOMIZE WORKSTRAIGHT

You will be able to customize:

- Work Order Fields
- Terms for Work Order
- Asset Setting
- Invoice Settings
- Quickbooks Integration
- Dashboard Message



Rafael Navarro
Administrator

CHECK OUT THE HELP CENTER

Dashboard

Work Orders

Calendar

Customers

Invoices

Assets

Reports

Company Directory

Settings

? Help Center



Create Work Order

Administrators Only

Getting Started

Work Orders Help

Invoices Help

Calendar Help

Tab only viewable by users with company settings access

Administrators Only

[Send A Message To WorkStraight Support](#)

Frequently Asked Questions

What are the different user permission levels?

Can you give me ideas on ways to use WorkStraight?

Who is considered a "user"?

How do I add new users to the company account?

What happens after I add a new user?

What happens after I delete a user?

Can I "un-delete" a user?

Can I resend login credentials and verification emails to individual users?

How do I sync Customers and Invoices with QuickBooks?

How do I give my Customers login access?

Who can post a message on the dashboard?

Where do I manage billing info, upgrade my plan, or close my company's WorkStraight account?

FAQ's

This is a **very easy** way to learn how to use WorkStraight. You will find help with your **Work Orders, Invoices, Calendar, and more.**