WORKSTRAIGHT

Thank you for opening a WorkStraight account!

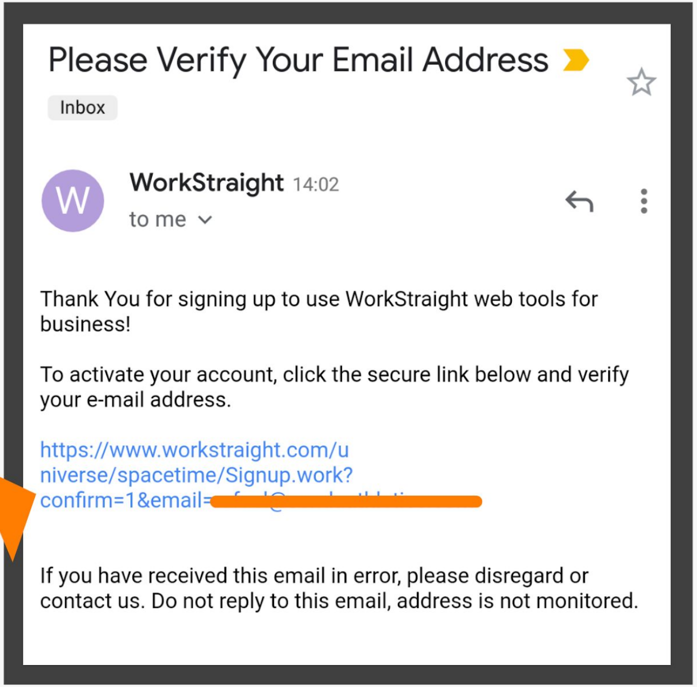
This is a short guide to help you with your first steps with us.

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.


Please Verify Your Email Address

Inbox

WorkStraight 14:02

to me

Thank You for signing up to use WorkStraight web tools for business!

To activate your account, click the secure link below and verify your e-mail address.

https://www.workstraight.com/universe/spacetime/Signup.work?confirm=1&email=

If you have received this email in error, please disregard or contact us. Do not reply to this email, address is not monitored.

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

support@workstraight.com

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.

Welcome to WorkStraight Inbox

WorkStraight 16:03
to me

Hello Test,

Thank You for signing up to use WorkStraight web tools for business!

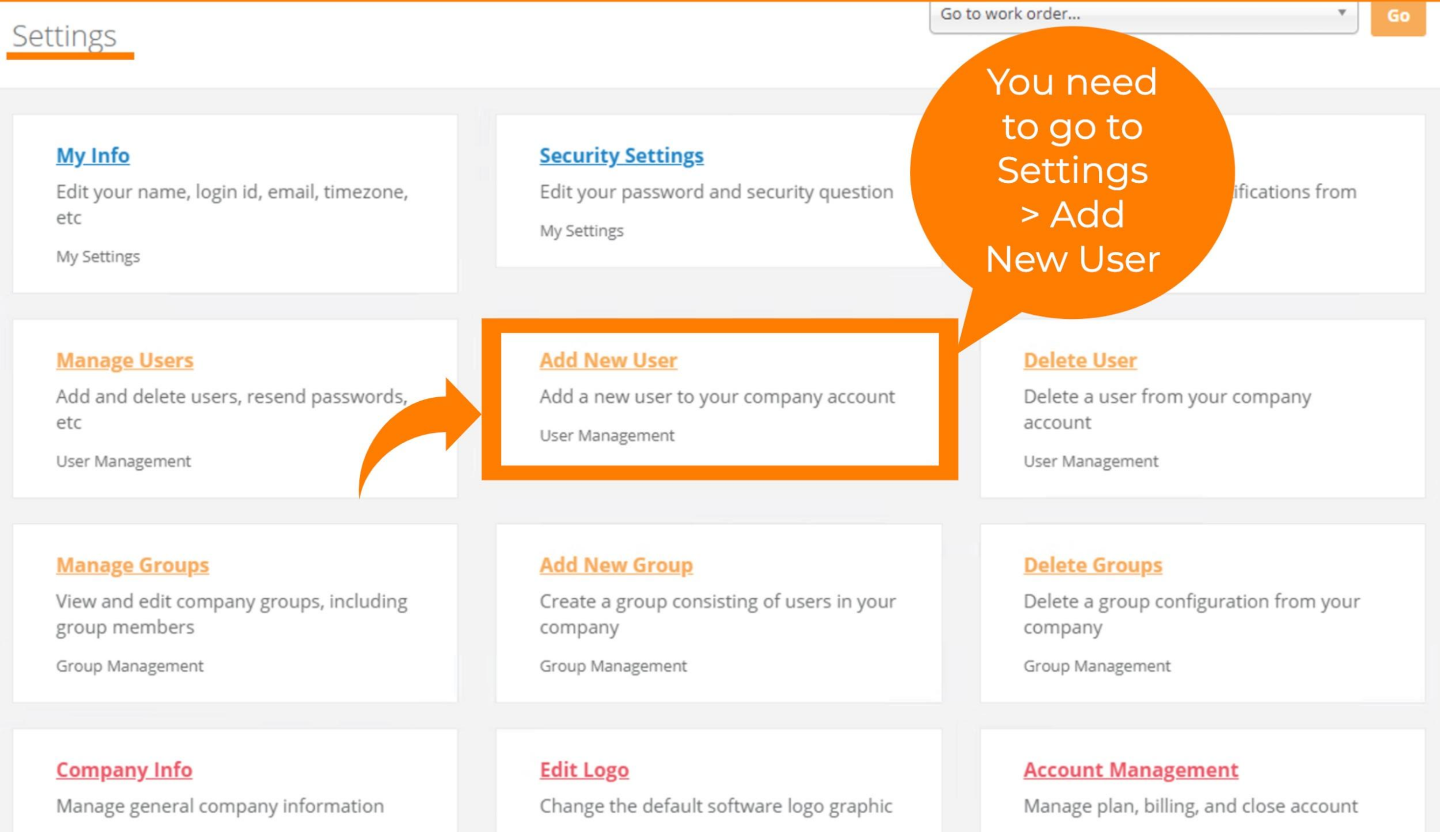
Here is your login information:

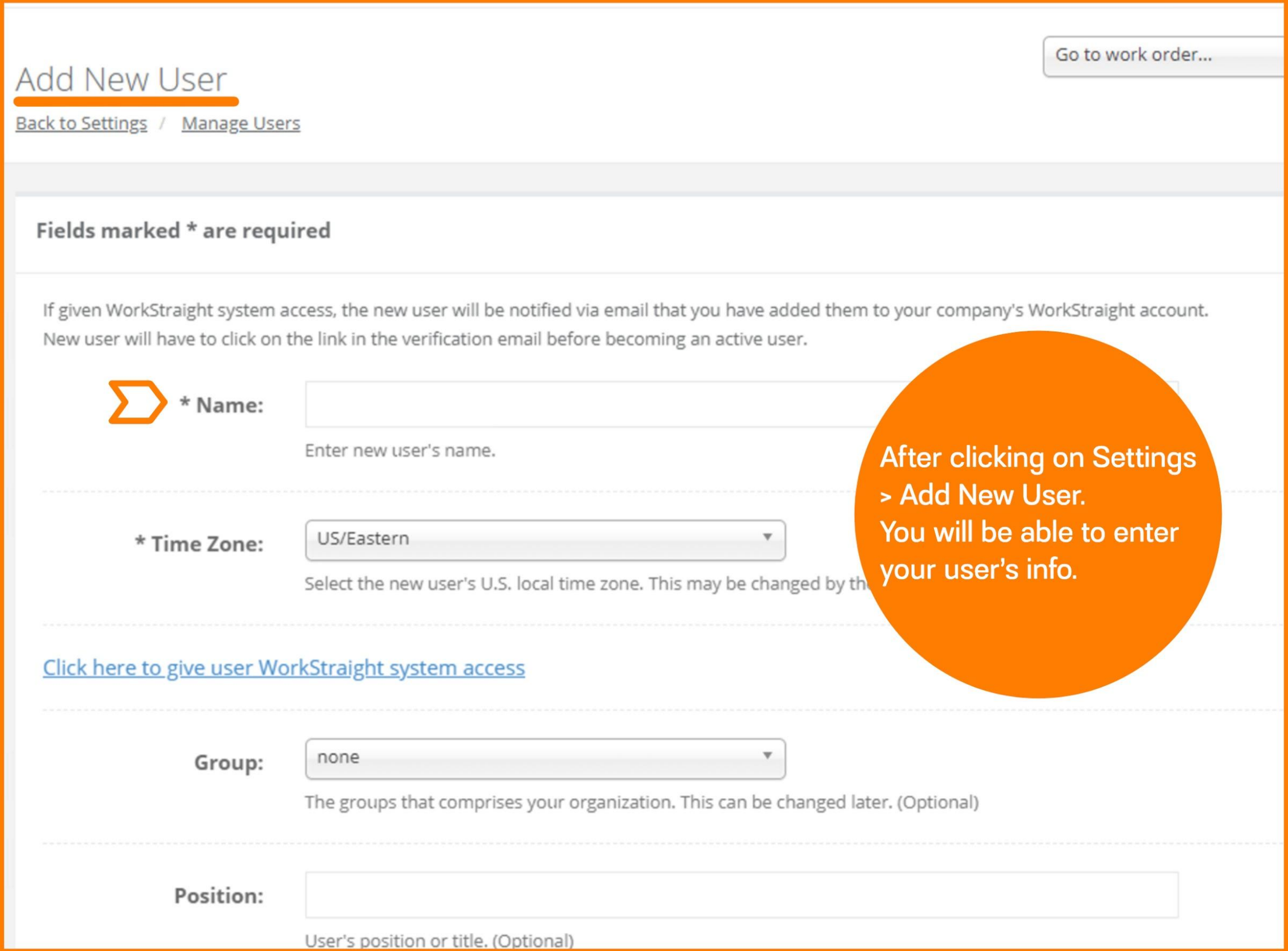
Login ID: [redacted]
Password: [redacted]

Invite colleagues and clients to work with you! Simply login to WorkStraight and click on "Settings" to add new users.

If you have received this in error, please disregard or contact us.
Do not reply to this email, address is not monitored.

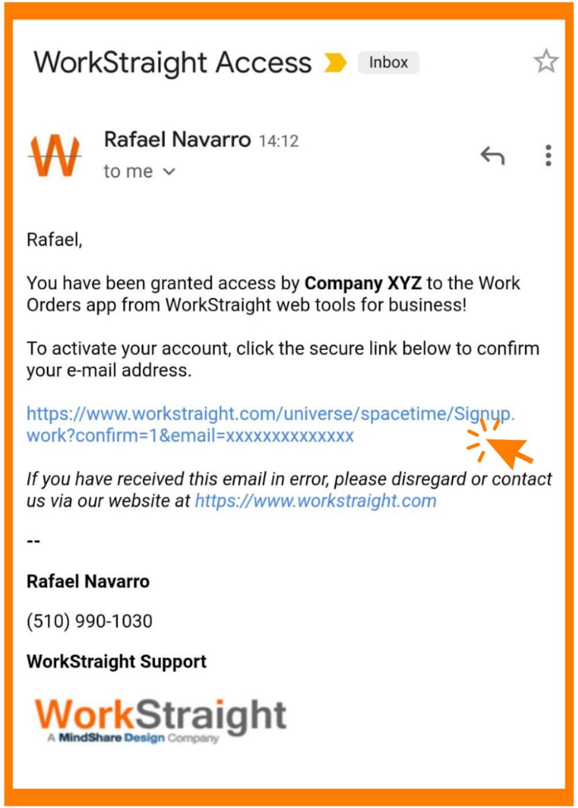
HOW TO
ADD A NEW USER?





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

USER CONFIRMATION EMAIL



WorkStraight Access Inbox

Rafael Navarro 14:12
to me

Rafael,

You have been granted access by **Company XYZ** to the Work Orders app from WorkStraight web tools for business!

To activate your account, click the secure link below to confirm your e-mail address.

https://www.workstraight.com/universe/spacetime/Signup.work?confirm=1&email=xxxxxxxxxxxxxx

If you have received this email in error, please disregard or contact us via our website at https://www.workstraight.com

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Rafael Navarro

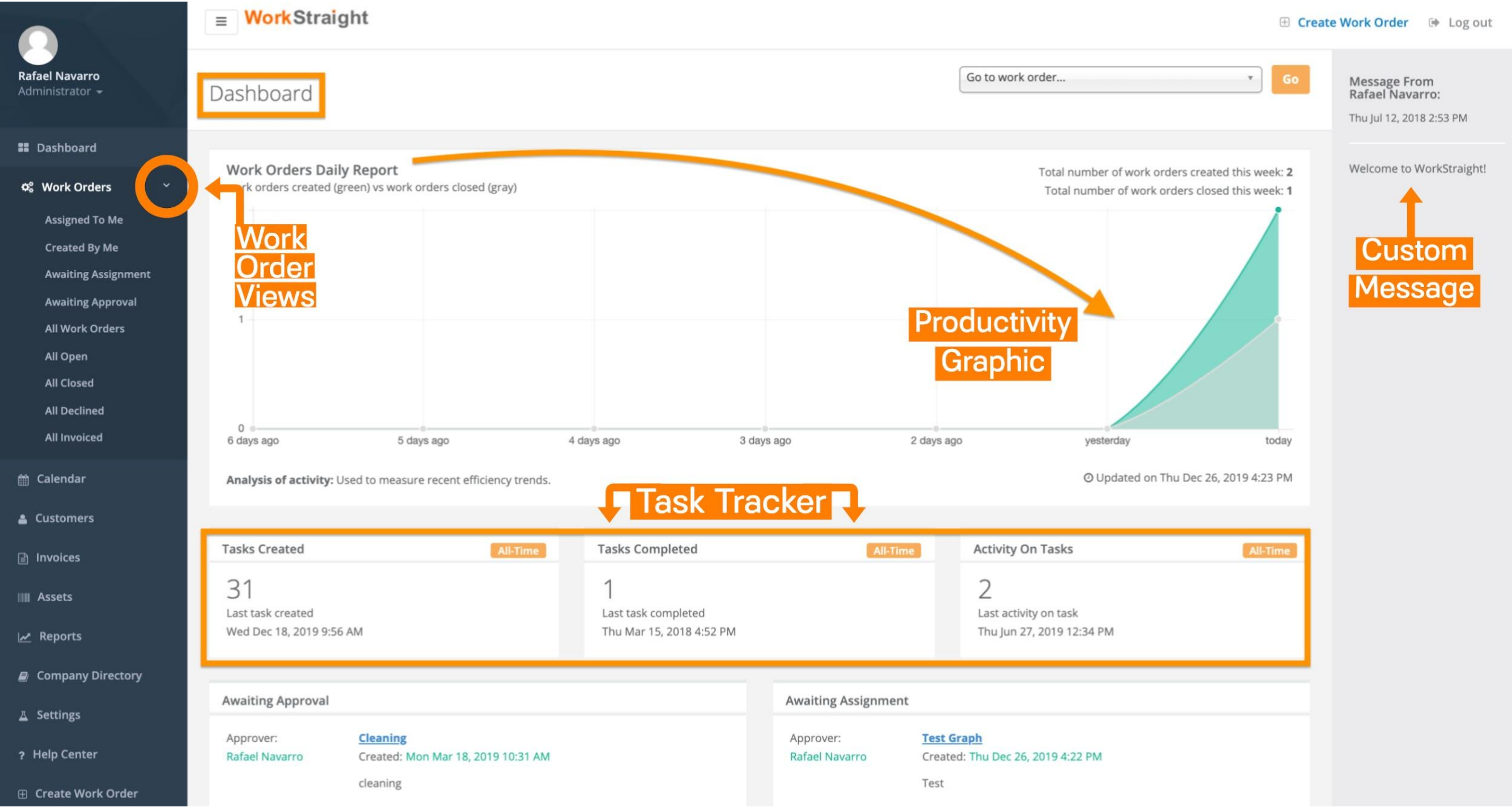
(510) 990-1030

WorkStraight Support

WorkStraight
A MindShare Design Company

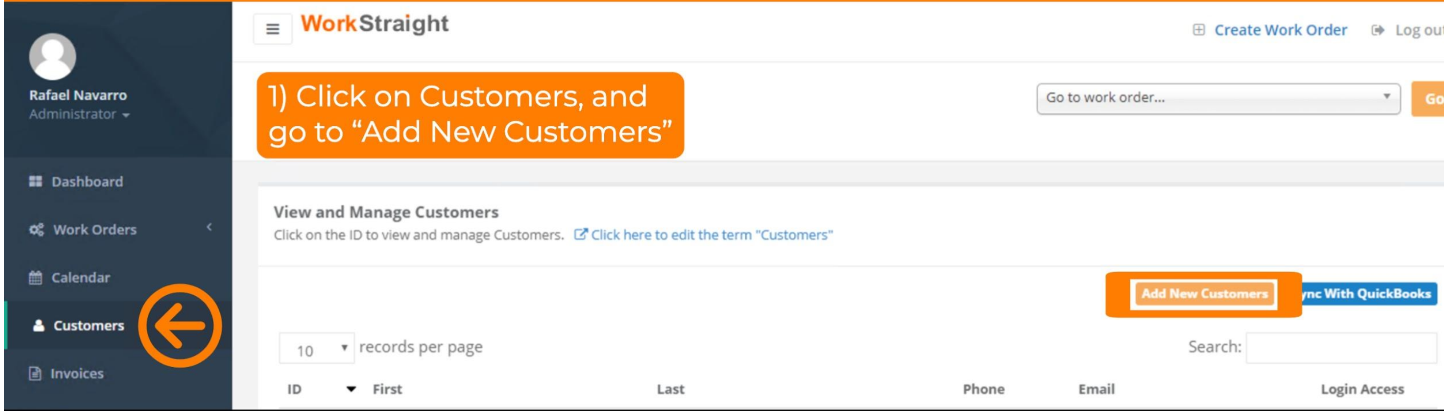
After entering your user's information, they will receive a confirmation email.

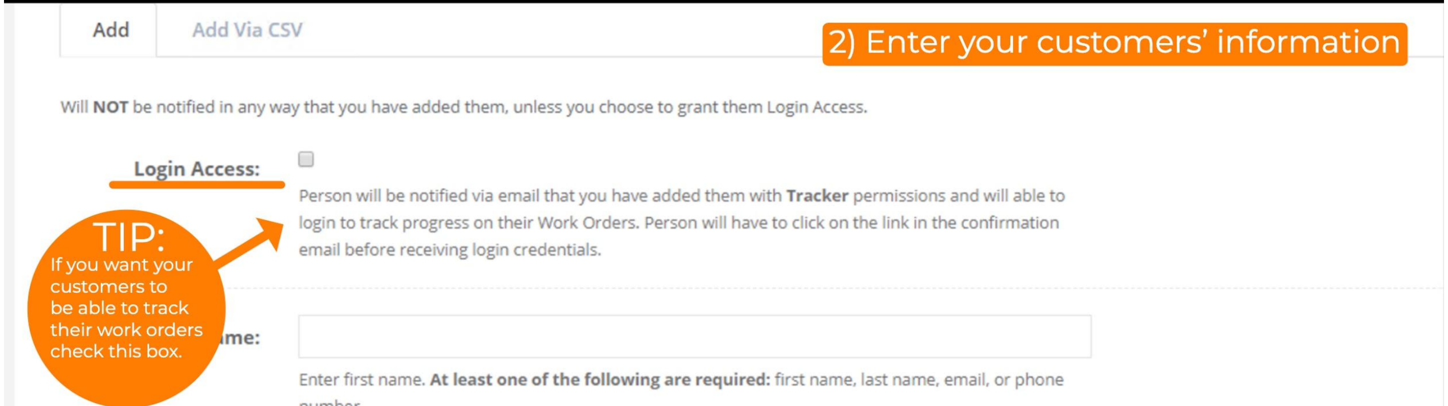
New users will need to click on the link, to receive their login credentials.



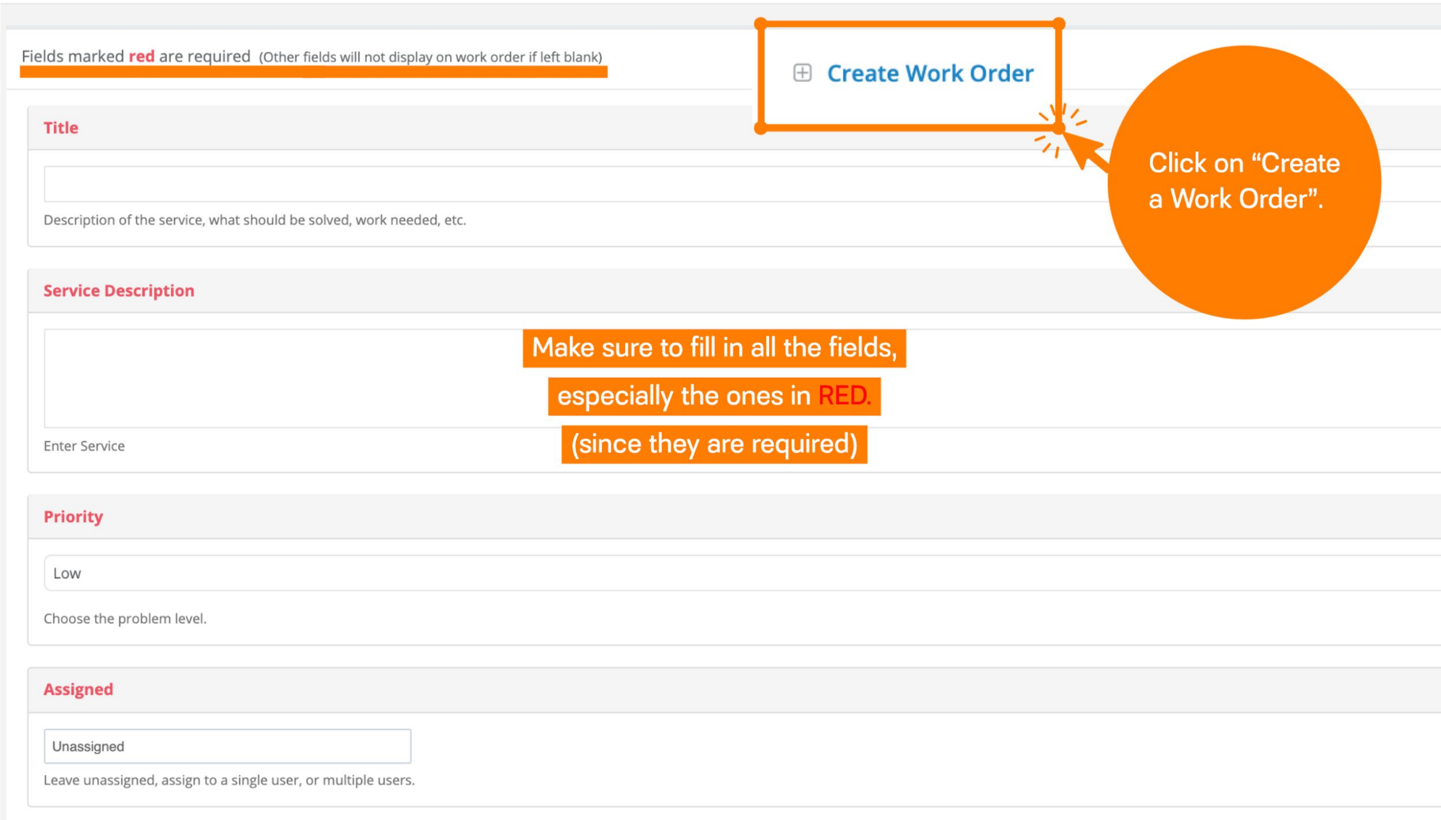
WorkStraight
Create Work Order
Log out
Rafael Navarro
Administrator
Dashboard
Work Orders
Assigned To Me
Created By Me
Awaiting Assignment
Awaiting Approval
All Work Orders
All Open
All Closed
All Declined
All Invoiced
Calendar
Customers
Invoices
Assets
Reports
Company Directory
Settings
Help Center
Create Work Order
Dashboard
Go to work order...
Go
Message From Rafael Navarro:
Thu Jul 12, 2018 2:53 PM
Welcome to WorkStraight!
Custom Message
Work Orders Daily Report
rk 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
Work Order Views
Productivity Graphic
1
0
6 days ago
5 days ago
4 days ago
3 days ago
2 days ago
yesterday
today
Analysis of activity: Used to measure recent efficiency trends.
Updated on Thu Dec 26, 2019 4:23 PM
Task Tracker
Tasks Created
All-Time
31
Last task created
Wed Dec 18, 2019 9:56 AM
Tasks Completed
All-Time
1
Last task completed
Thu Mar 15, 2018 4:52 PM
Activity On Tasks
All-Time
2
Last activity on task
Thu Jun 27, 2019 12:34 PM
Awaiting Approval
Approver:
Rafael Navarro
Cleaning
Created: Mon Mar 18, 2019 10:31 AM
cleaning
Awaiting Assignment
Approver:
Rafael Navarro
Test Graph
Created: Thu Dec 26, 2019 4:22 PM
Test

HOW TO ADD A CUSTOMER?

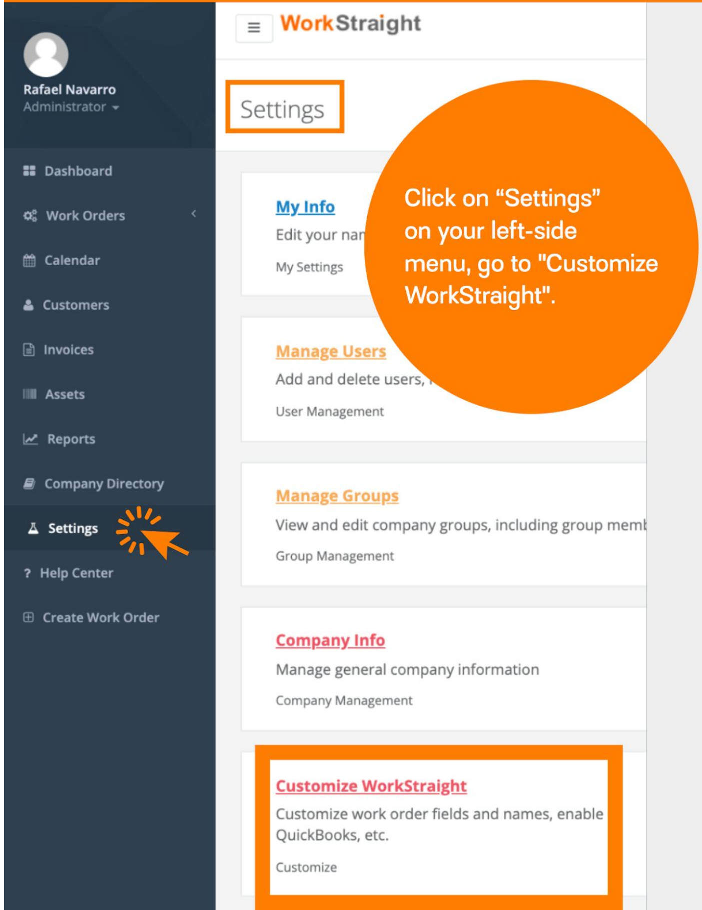




CREATE A WORK ORDER



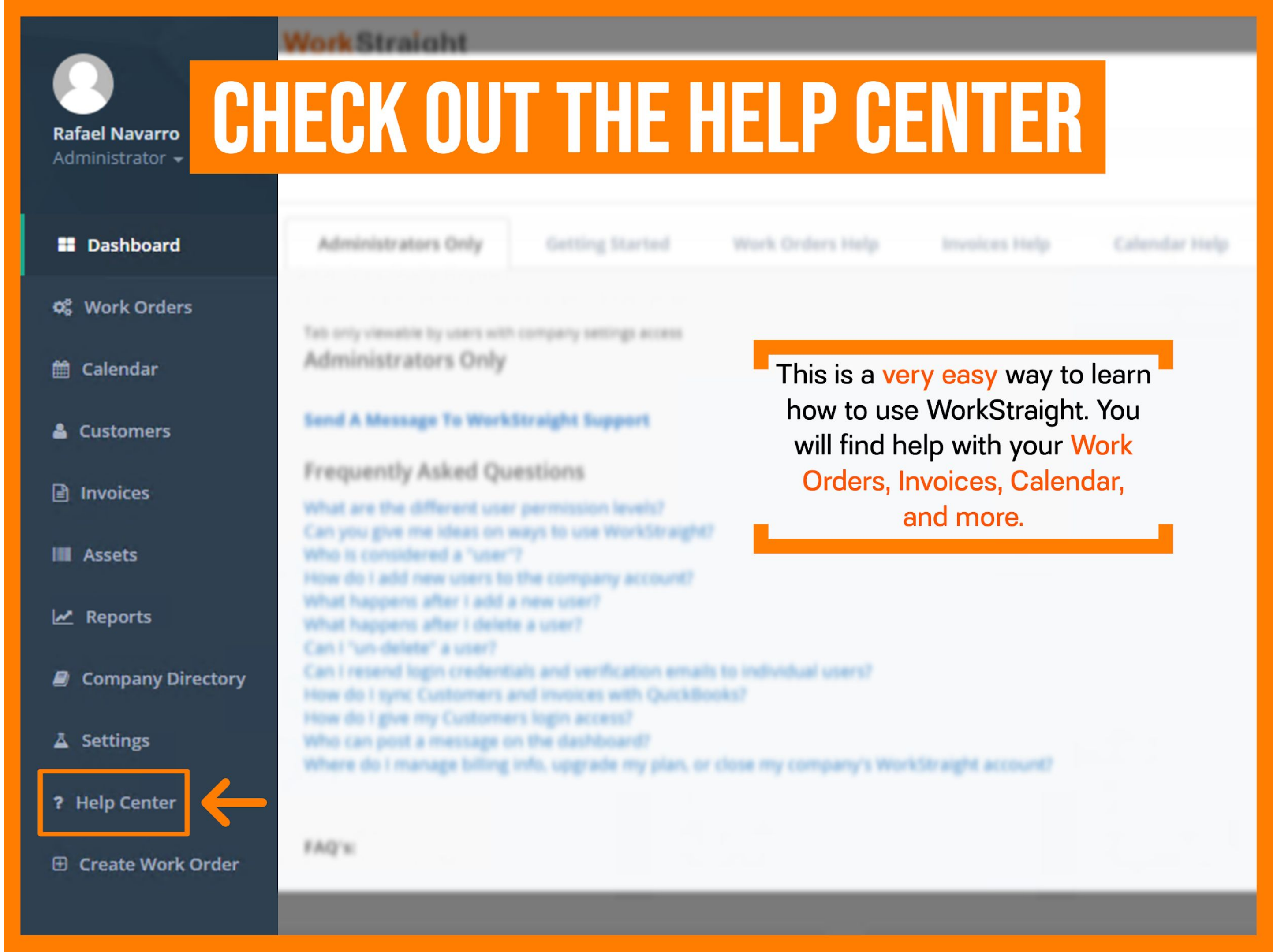
CUSTOMIZATION



CUSTOMIZE WORKSTRAIGHT

You will be able to customize:

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


CHECK OUT THE HELP CENTER
Rafael Navarro
Administrator
Dashboard
Work Orders
Calendar
Customers
Invoices
Assets
Reports
Company Directory
Settings
Help Center
Create Work Order
This is a very easy way to learn how to use WorkStraight. You will find help with your Work Orders, Invoices, Calendar, and more.