

# TAKE FLIGHT COLLABOSPHERE

ENTERPRISE TRACK

EXPERT SHORTCUTS

SUSAN FUJIKI | CENTRAL DESKTOP



# About

Often times people get used to using the same procedures and processes to get things done, but there may be a better way.

SocialBridge has many features that are often under-utilized by our users.

Save time. Learn the shortcuts.

Let us show you some hidden gems and multi-feature combinations that our team loves to use.

# Agenda



- Hidden gems
  - Save time
  - Get organized
- When forces combine
  - Increase awareness
  - Increase interest
  - Increase automation
- Q+A



**Class**  
First class

**Departure**  
Santa Monica

**Arrival**  
Cloud 9



SAVE TIME AND GET  
ORGANIZED  
HIDDEN GEMS

# Save time: Quickly open documents

Cloudosphere

Home Files & Discussions Project Management Calendar Database People


« Back to Items not in Folders

thankyou

Edit Page

Tags: [add tags](#)

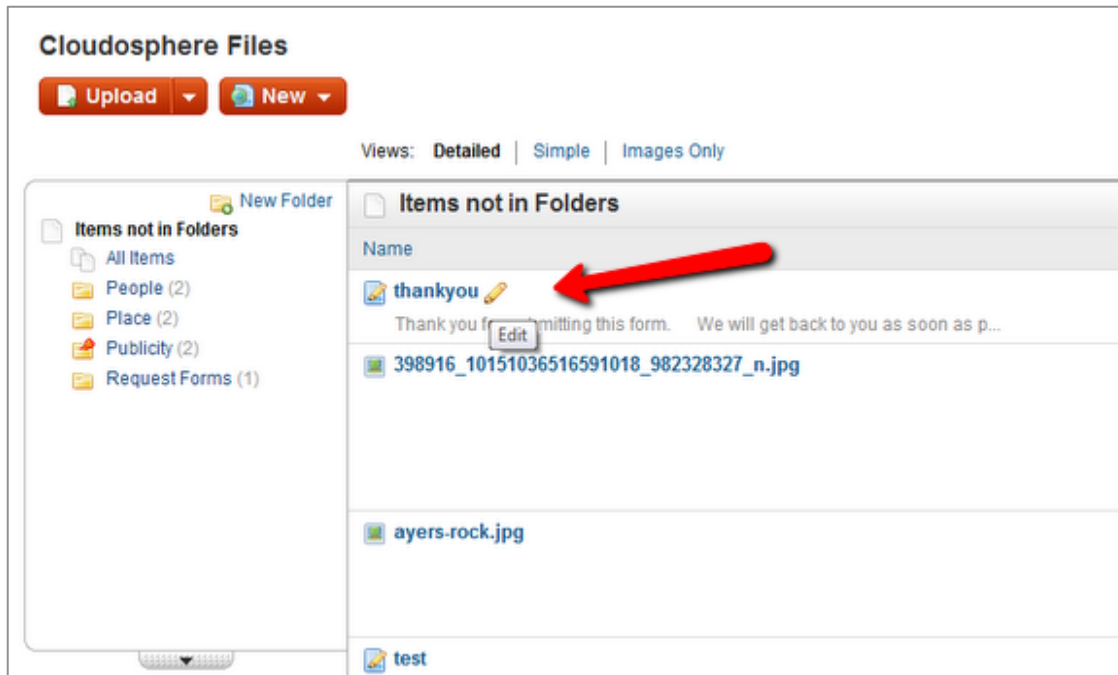
Thank you for submitting this form.



You don't have to click on the file in Files & Discussions to open it



# Save time: Quickly open documents




Click on the pencil to open directly



# Save time: Format cells

Quickly make cells and application blocks line up

Cloudosphere Home Customize | Version 86 | Options



**Welcome to Cloudosphere!**

*Want to request a project? This is where it is done*

Submit a new request or check on previously submitted requests. Have a look at the project plan or the project properties.

Current requestsUpcoming Month

### Project Requests

Due Date	Requested By	Type of Project Requested	Name of Department
Oct 25, 2012	Susan	Audio	Dramatic
Oct 18, 2012	Susan	Design	Sports
Nov 16, 2012	Susan	Print	Creative
Oct 10, 2012	Fred	Print	
Oct 25, 2012	Susan	Audio	Dramatic
Nov 21, 2012	Susan	Print	Creative
Oct 11, 2012	Kate	Design	Creative
Oct 26, 2012	David Solis	Print	Hospitality
Oct 23, 2012	Sarah White	Audio	Dramatic

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### October 2012

Show Workspace Legend

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10 ✓ [Cloudosphere]	11 TODAY ✓ [Cloudosphere]	12	13
14	15	16	17	18	19	20
21	22	23 ↑ [Cloudosphere]	24	25 ↑ [Cloudosphere]	26 ↑ [Cloudosphere]	27

7

#CENTRALDESKTOP

# Save time: Format cells

Highlight app block or cell. Select Format in **toolbar**. Save.

The screenshot displays the 'Cloudosphere Home' editor interface. At the top, there are buttons for 'Save', 'Cancel', and 'Restore to Default'. Below these is a yellow instruction bar: 'Use the Insert More icon to insert different Application Blocks to Customize this Screen.' The main editor area features a toolbar with options like 'New Page', 'Insert Link', 'Attach File or Image', 'Insert More', and 'Fullscreen'. A red arrow points to the 'Format' button in the toolbar. A dropdown menu is open under 'Format', listing options: 'Normal', 'Heading 1', 'Heading 2', 'Heading 3', 'Quote', and 'Preformatted'. The background content includes a 'Welcome to Cloudosphere!' heading, a sub-heading 'Want to request a project? This is where it is done', and a paragraph: 'Submit a new request or check on previously submitted requests. Have a look at the project plan or the project properties.' Below this is an orange section titled 'Current requests' and a footer area with a 'Database View: Project Requests - Standard View' and a 'Calendar: grid of Tasks, Milestones, Events'.






# Save time: Format cells

Now everything is lined up.

Cloudosphere Home Customize | Version 87 | Options



**Welcome to Cloudosphere!**

*Want to request a project? This is where it is done*

Submit a new request or check on previously submitted requests.  
Have a look at the project plan or the project properties.

---

**Current requests**

**Project Requests**

Due Date	Requested By	Type of Project Requested	Name of Department
Oct 25, 2012	Susan	Audio	Dramatic
Oct 18, 2012	Susan	Design	Sports
Nov 16, 2012	Susan	Print	Creative
Oct 10, 2012	Fred	Print	
Oct 25, 2012	Susan	Audio	Dramatic
Nov 21, 2012	Susan	Print	Creative

**Upcoming Month**

October 2012 Show Workspace Legend October 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10 [Cloudosphere]	11 TODAY [Cloudosphere]	12	13



# Save time: Common URLs

- Easy to learn
- Easy to navigate

/av - goes to files  
/dbapp - goes to data  
/project/ - goes to p  
/calendar - goes



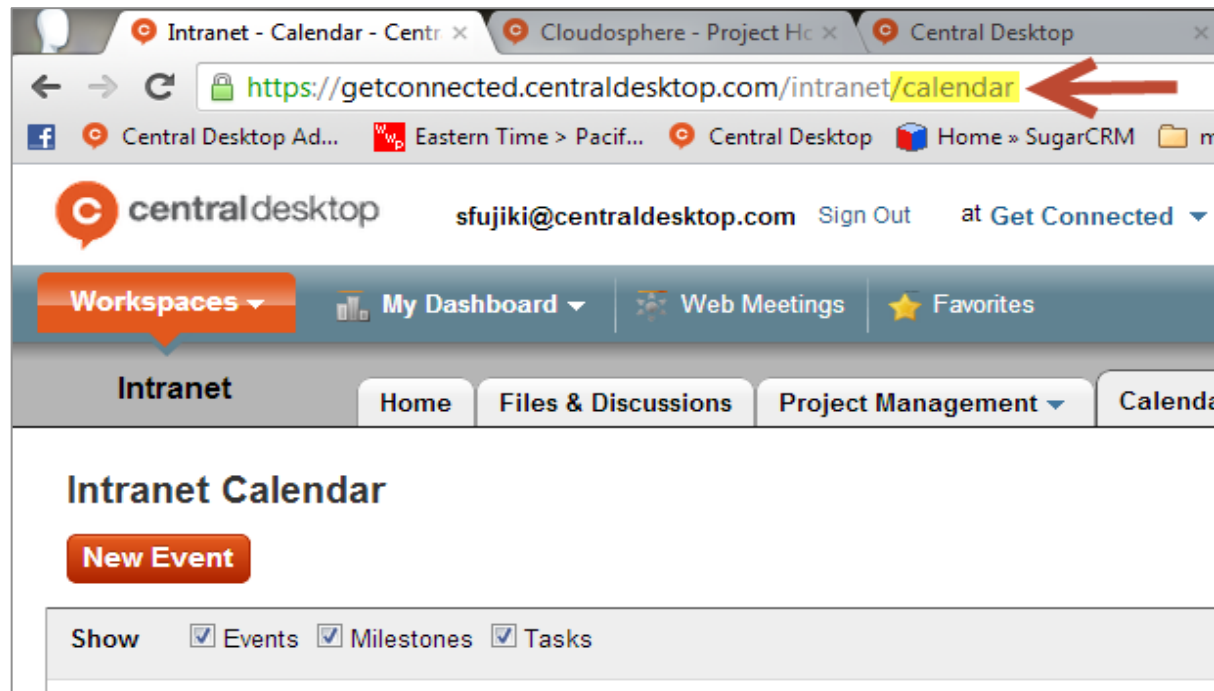
# Save time: Common URLs

[/av](#) - goes to files and discussions (items not in folders)

[/dbapp](#) - goes to databases

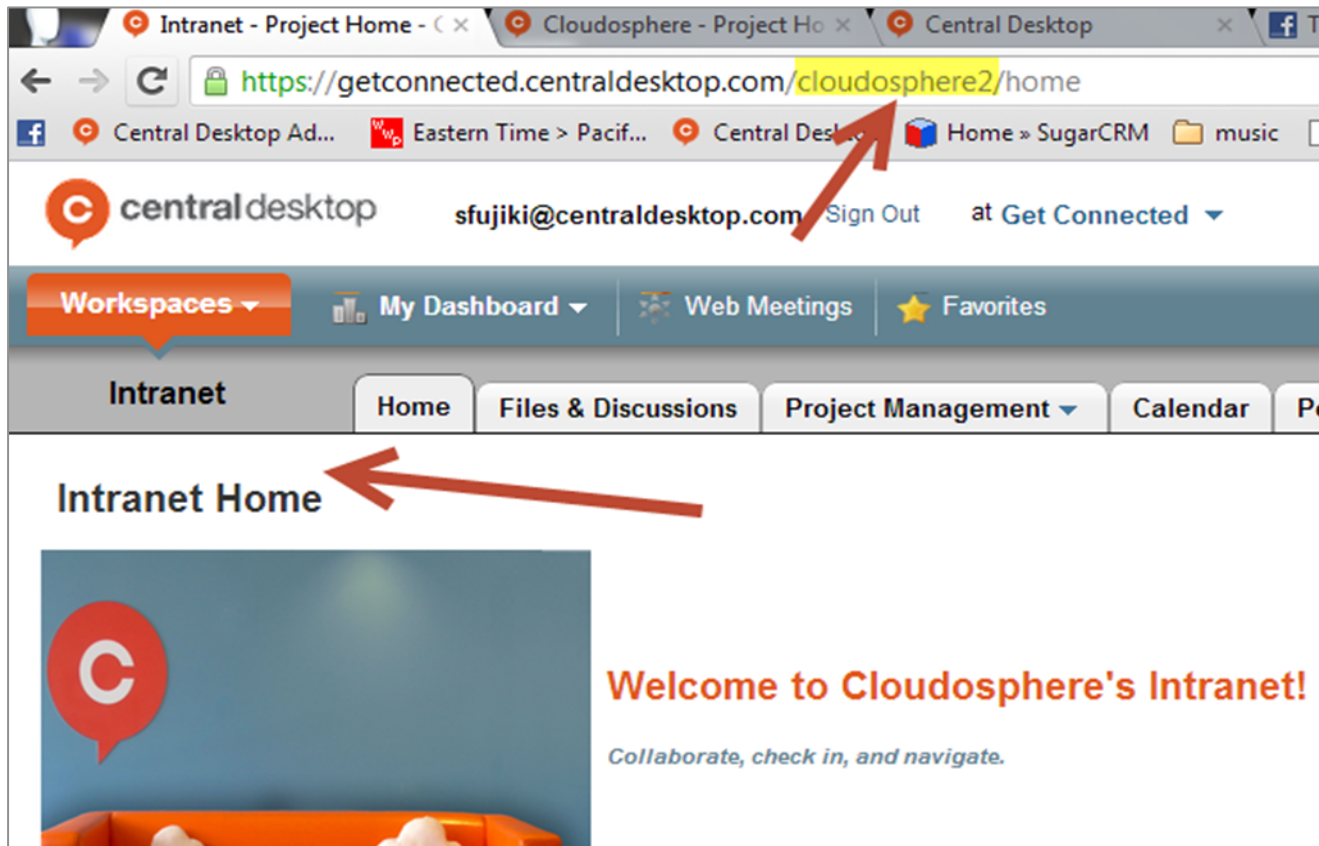
[/project/](#) - goes to project management

[/calendar](#) - goes to calendar



# Get organized: Update URLs

You have a workspace that you renamed but want to change the URL



# Get organized: Update URLs

**Change URL**

<https://getconnected.centraldesktop.com/>  
intranet

OK Cancel

**TIP:**  
Check existing links

- Workspace settings
- Name + description
- URL
- Change URL
- Add new name

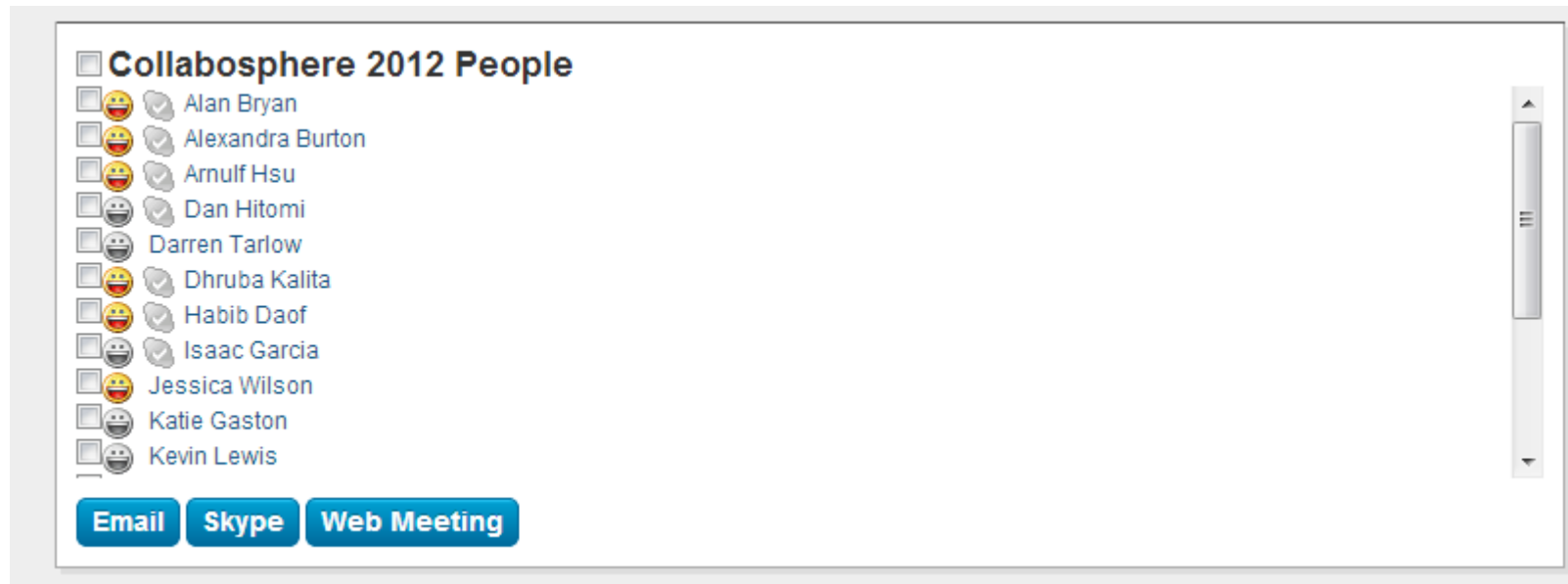
Invitation Only. Public Workspaces are public to the entire internet. Private workspaces are recommended.



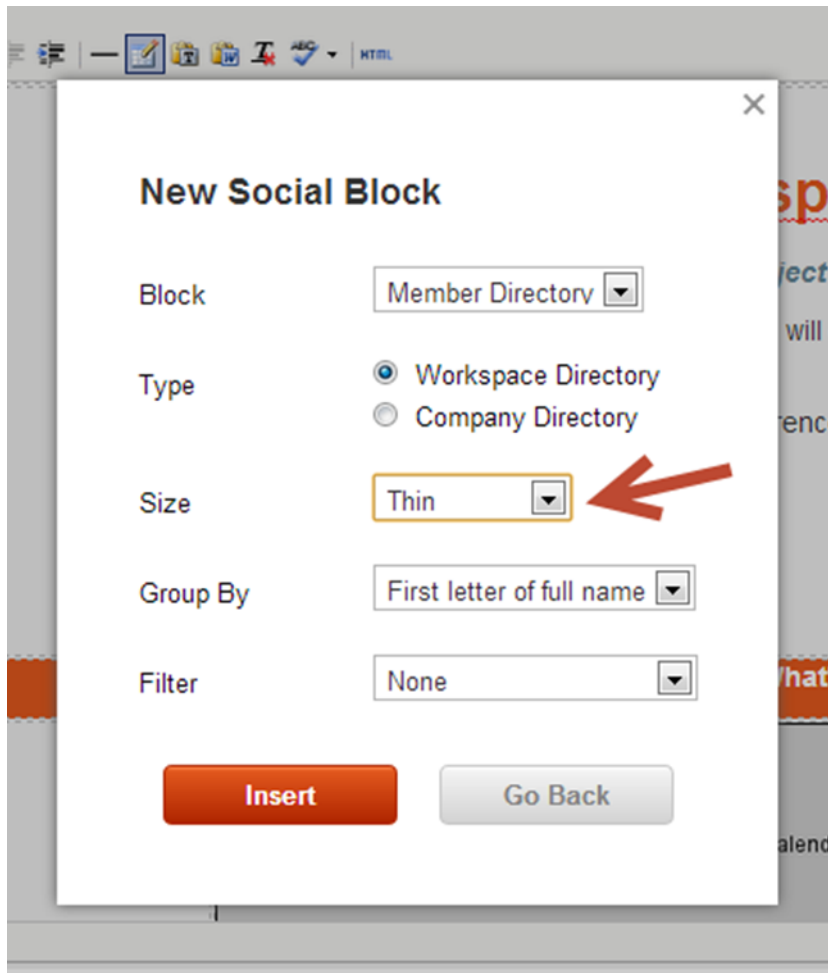
# Get organized: Member directory

Member Directory [application block](#)

Quick way to email, IM, Skype, web meeting and see who is online



# Get organized: Member directory



**New Social Block**

Block: Member Directory

Type:  Workspace Directory  Company Directory

Size: Thin

Group By: First letter of full name

Filter: None

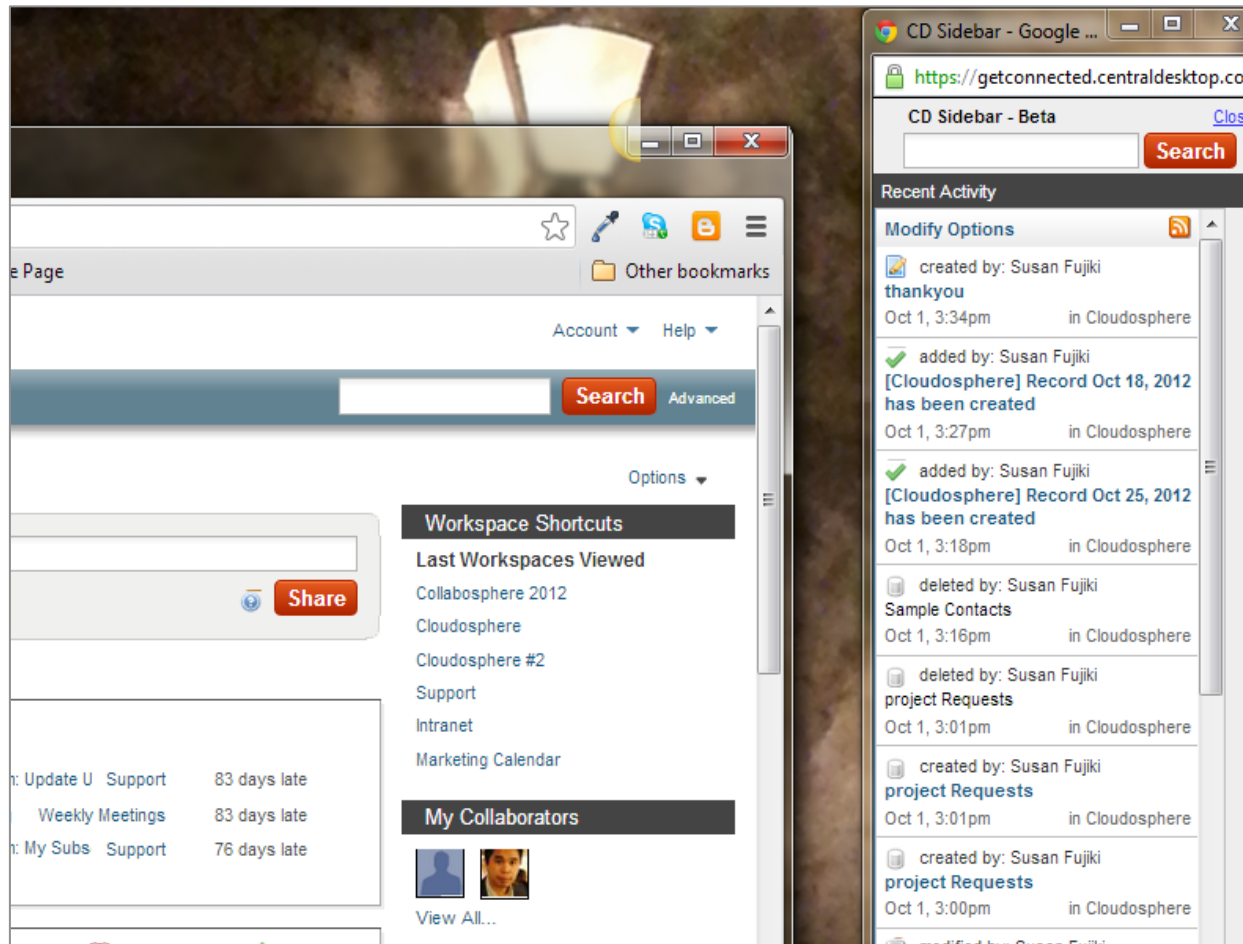
Insert Go Back

- Insert Member Directory application block
- Select workspace or company
- THIN
- Group
- Filter
- Insert



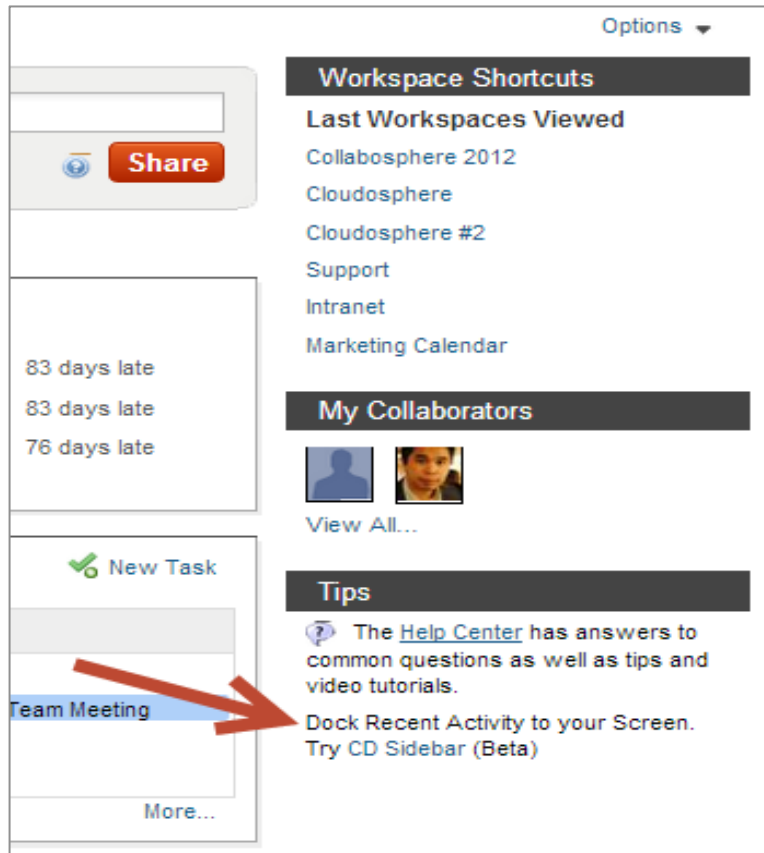
# Get organized: CD sidebar

See everything that is happening while you remain focused





# Get organized: CD sidebar

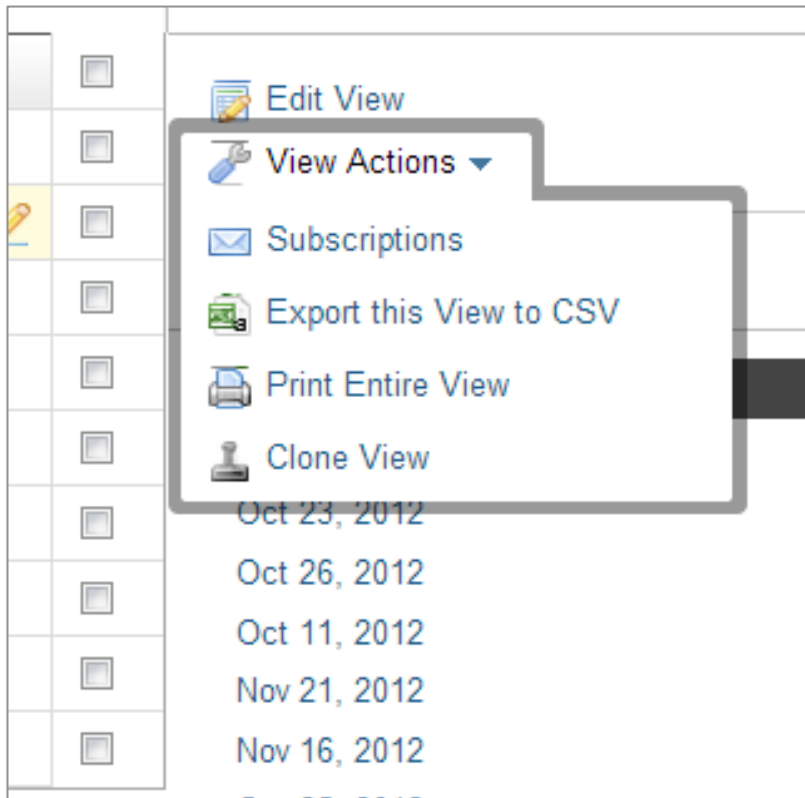


- My Dashboard
- “Dock Recent Activity to your Screen. Try [CD Sidebar](#)”
- Click on link to open



# Get organized: Database subscriptions

Stay notified, even when you aren't part of the workspace





# Get organized: Database subscriptions

« Back to Project Requests Database

## Standard View Subscription

**Recipients**

 Susan Fujiki ×

Start typing to select users 

AND/OR send to external email addresses, simply comma separate the email addresses below:

**Options**

**Email Frequency**  
Daily ▾

**Interval**  
every 2 hours ▾ from 8 AM ▾ to 5 PM ▾

Email even if no results

### TIP:

Choose the frequency of emails. You can choose days to send, which is useful for meeting preparation.

*You can also subscribe non-members using CC!*



THAT'S JUST  
SCRATCHING  
THE SURFACE

# Multi-player combos

Feature combinations create powerful processes

- Increase awareness
- Increase interest
- Increase automation



WHEN FORCES  
COMBINE  
POWERFUL THINGS  
HAPPEN

# Combos for added impact

- **Increase due date visibility** through requests and calendar application blocks
- **Email records** directly to folder and **kick off a series of tasks**
- **Customize email notifications** and create online documents from databases and folders




# INCREASE AWARENESS DUE DATES AT A GLANCE



# What's the story?

A project manager wants to quickly look at upcoming weeks to see the workload and due dates. Doesn't want to navigate all over the workspace to see what's going on.



**Welcome to Cloudosphere!**  
*Want to request a project? This is where it is done*  
Submit a new request or check on previously submitted requests.  
Have a look at the project plan or the project properties.

**Current requests**

**Project Requests**

Due Date	Requested By	Type of Project Requested	Name of Department
Oct 25, 2012	Susan	Audio	Dramatic
Oct 18, 2012	Susan	Design	Sports
Nov 16, 2012	Susan	Print	Creative

1 of 1

**Project Requests**

Due Date	Requested By	Type of Project Requested	Name of Department	Phone Number	Email	Additional notes	Request Status
Oct 25, 2012	Susan	Audio	Dramatic	654-654-5489	susanfujiki@gmail.com	Here are some notes	New

1 of 1

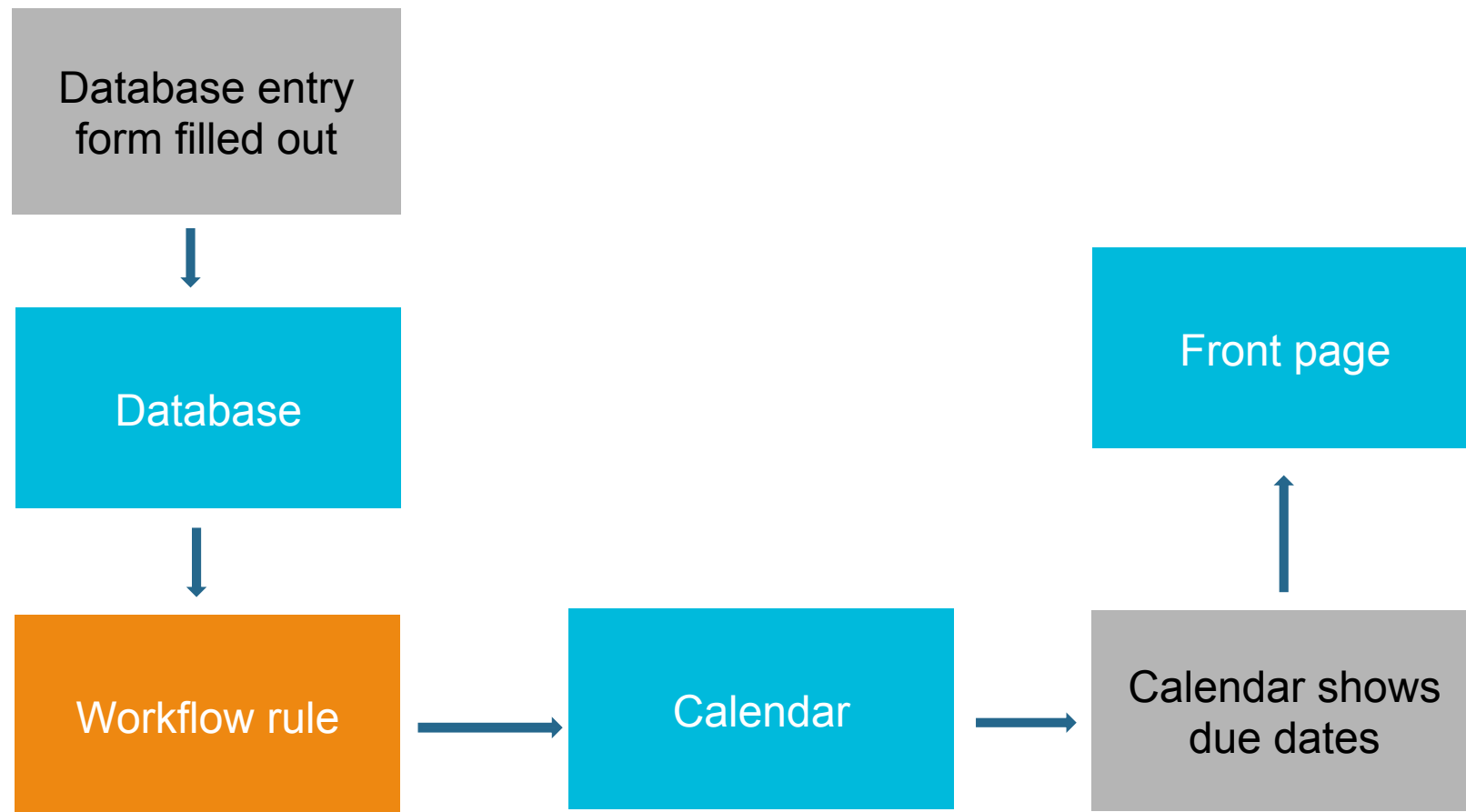
**Upcoming Month**

October 2012 [Show Workspace Legend](#) October 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8 TODAY	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			



# Increase awareness

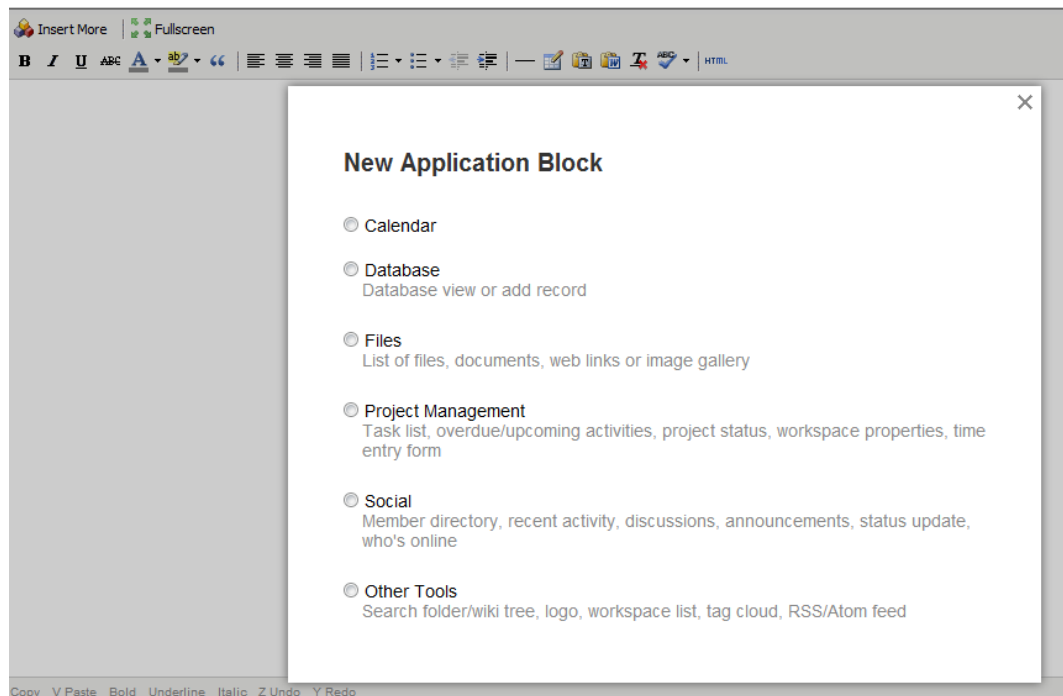


# Increase awareness

## Greater visibility of upcoming due dates

- Front pages can be powerful
- Add the right application blocks
- Add some automation

See everything **FASTER.**



# Increase awareness

## Greater visibility of upcoming due dates

Cloudosphere Home

**Welcome to Cloudosphere!**

*Want to request a project? This is where it is done*

Submit a new request or check on previously submitted requests.  
Have a look at the project plan or the project properties.

Current requests

**Project Requests**

Due Date	Requested By	Type of Project Requested	Name of Department
Oct 25, 2012	Susan	Audio	Dramatic
Oct 24, 2012	Susan	Design	Sports
Oct 5, 2012	Susan	Print	Creative
Oct 28, 2012	Fred	Print	
Oct 28, 2012	Susan	Audio	Dramatic
Oct 17, 2012	Susan	Print	Creative
Oct 24, 2012	Kate	Design	Creative
Oct 24, 2012	David Solis	Print	Hospitality
Oct 13, 2012	Sarah White	Audio	Dramatic

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Upcoming Month

October 2012 Show Workspace Legend October 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5 ✓ Print Susan	6
7	8	9	10 ✓ [Cloudosphere] Rec	11 TODAY	12 ✓ [Cloudosphere] Rec	13 ✓ Audio Sarah White
14	15	16	17 ✓ Print Susan	18 ✓ Oct 18, 2012	19	20
21 ✓ Oct 21, 2012	22	23 ✓ Oct 23, 2012 ✓ [Cloudosphere] Rec ✓ Oct 23, 2012	24 ✓ Design Susan ✓ Print David Solis ✓ Design Kate	25 ✓ Audio Susan ✓ [Cloudosphere] Rec	26 ✓ Oct 26, 2012 ✓ Audio Susan ✓ Print Fred ✓ [Cloudosphere] Rec	27
28	29	30	31 ✓ Oct 31, 2012			

**Project Requests**

Due Date	Requested By	Type of Project Requested	Name of Department	Phone Number	Email	Additional notes	Request Status
Oct 25, 2012	Susan	Audio	Dramatic	654-654-5489	susanfujiki@gmail.com	Here are some notes	New
Oct 28, 2012	Fred	Print		661-578-9975	fred@hotmail.com	I would love to write lots of notes here but I would prefer it if you called me. Thanks.	New
Oct 28, 2012	Susan	Audio	Dramatic	654-654-5489	susanfujiki@gmail.com	Here are some notes	New
Oct 17, 2012	Susan	Print	Creative	818-987-5687	susanfujiki@gmail.com	I need this project asap. Thanks.	New
Oct 24, 2012	Kate	Design	Creative	818-987-5687	susanfujiki@gmail.com	I need this project asap. Thanks.	New
Oct 24, 2012	David Solis	Print	Hospitality	859-987-6646	sfujiki@gmail.com		New
Oct 13, 2012	Sarah White	Audio	Dramatic		sfujiki@centraldesktop.com		New

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What if there was a way to link **project requests** to **calendar application blocks** to show more at a glance – like this?



# Increase awareness

Create a database

**Cloudfosphere Data**

**New Database**

Database	Description
Project Requests	



# Increase awareness

Add a [database view application block](#) to the front page

Due Date	Requested By	Type of Project Requested	Name of Department
Oct 25, 2012	Susan	Audio	Dramatic
Oct 24, 2012	Susan	Design	Sports
Oct 5, 2012	Susan	Print	Creative
Oct 26, 2012	Fred	Print	
Oct 26, 2012	Susan	Audio	Dramatic
Oct 17, 2012	Susan	Print	Creative
Oct 24, 2012	Kate	Design	Creative
Oct 24, 2012	David Solis	Print	Hospitality
Oct 13, 2012	Sarah White	Audio	Dramatic

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# Increase awareness

Add a [custom view](#) to the [database](#) to see custom views.  
Add a [custom view application block](#) to the front page.

Due Date	Requested By	Type of Project Requested	Name of Department	Phone Number	Email	Additional notes	Request Status
Oct 25, 2012	Susan	Audio	Dramatic	654-654-5489	<a href="mailto:susanfujiki@gmail.com">susanfujiki@gmail.com</a>	Here are some notes	New
Oct 26, 2012	Fred	Print		661-578-9575	<a href="mailto:fred@hotmail.com">fred@hotmail.com</a>	I would love to write lots of notes here but I would prefer it if you called me. Thanks.	New
Oct 26, 2012	Susan	Audio	Dramatic	654-654-5489	<a href="mailto:susanfujiki@gmail.com">susanfujiki@gmail.com</a>	Here are some notes	New
Oct 17, 2012	Susan	Print	Creative	818-987-5687	<a href="mailto:susanfujiki@gmail.com">susanfujiki@gmail.com</a>	I need this project asap. Thanks.	New
Oct 24, 2012	Kate	Design	Creative	818-987-5687	<a href="mailto:susanfujiki@gmail.com">susanfujiki@gmail.com</a>	I need this project asap. Thanks.	New
Oct 24, 2012	David Solis	Print	Hospitality	859-987-6546	<a href="mailto:sfujiki@gmail.com">sfujiki@gmail.com</a>		New
Oct 13, 2012	Sarah White	Audio	Dramatic		<a href="mailto:sfujiki@centraldesktop.com">sfujiki@centraldesktop.com</a>		New

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# Increase awareness

Add [calendar application block](#) to the Front Page.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11 TODAY	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			





# Increase awareness

Let's link it all together for a combo

Add a workflow rule to the database to show on the calendar when project requests are due.

**Edit Workflow Rule - Add new task to calendar**

Rule Name

Active  Inactive



# Increase awareness

Add workflow rule to a project request database

« Back to Workflow Rules

### Create Workflow Rule - New Workflow Rule

**Rule Name**

**Rule Type**

- Email Notification  
Allows you to send out an automated email notification when something happens
- Task Creation  
Allows you to create a task when something happens
- Action  
Allows you to update or set a field value
- Create Proof  
Allows you to create a new proof when something happens

**Criteria**

**When Record is**

Added  Modified  Deleted  Checked Nightly

[Additional Criteria](#)

**Notification**

**Insert Variable**

Due Date

**Task Title**

**Task Description**

This notification has been sent to you because the record ###\$TITLE### has been ###\$ACTIONED### in this database.

To view this record click here:  
###\$URL###

**TIP:**  
Edit the Task Title to show the best title for you on the calendar.



# Increase awareness

Add workflow rule to a project request [database](#) (cont)

**Start Date**

[Set Date to Variable](#)

[None](#) [Same Day](#) [Next Day](#) [Next Week](#) [Next Month](#)

**Due Date**

[Set Date to Variable](#)

[None](#) [Same Day](#) [Next Day](#) [Next Week](#) [Next Month](#)

**Tags**

[pick](#)

Comma separated

**Priority**

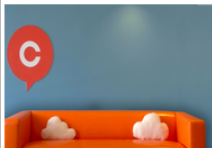
High  Medium  Low  None

Put the variable here



# Increase awareness: Level up

Cloudosphere Home



**Welcome to Cloudosphere!**  
Want to request a project? This is where it is done  
Submit a new request or check on previously submitted requests.  
Have a look at the project plan or the project properties.

## Now you can see everything in one place.

Current requests

**Project Requests**

Due Date	Requested By	Type of Project Requested	Name of Department
Oct 25, 2012	Susan	Audio	Dramatic
Oct 24, 2012	Susan	Design	Sports
Oct 5, 2012	Susan	Print	Creative
Oct 26, 2012	Fred	Print	
Oct 26, 2012	Susan	Audio	Dramatic
Oct 17, 2012	Susan	Print	Creative
Oct 24, 2012	Kate	Design	Creative
Oct 24, 2012	David Solis	Print	Hospitality
Oct 13, 2012	Sarah White	Audio	Dramatic

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Upcoming Month

October 2012 Show Workspace Legend October 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11 TODAY	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

**Project Requests**

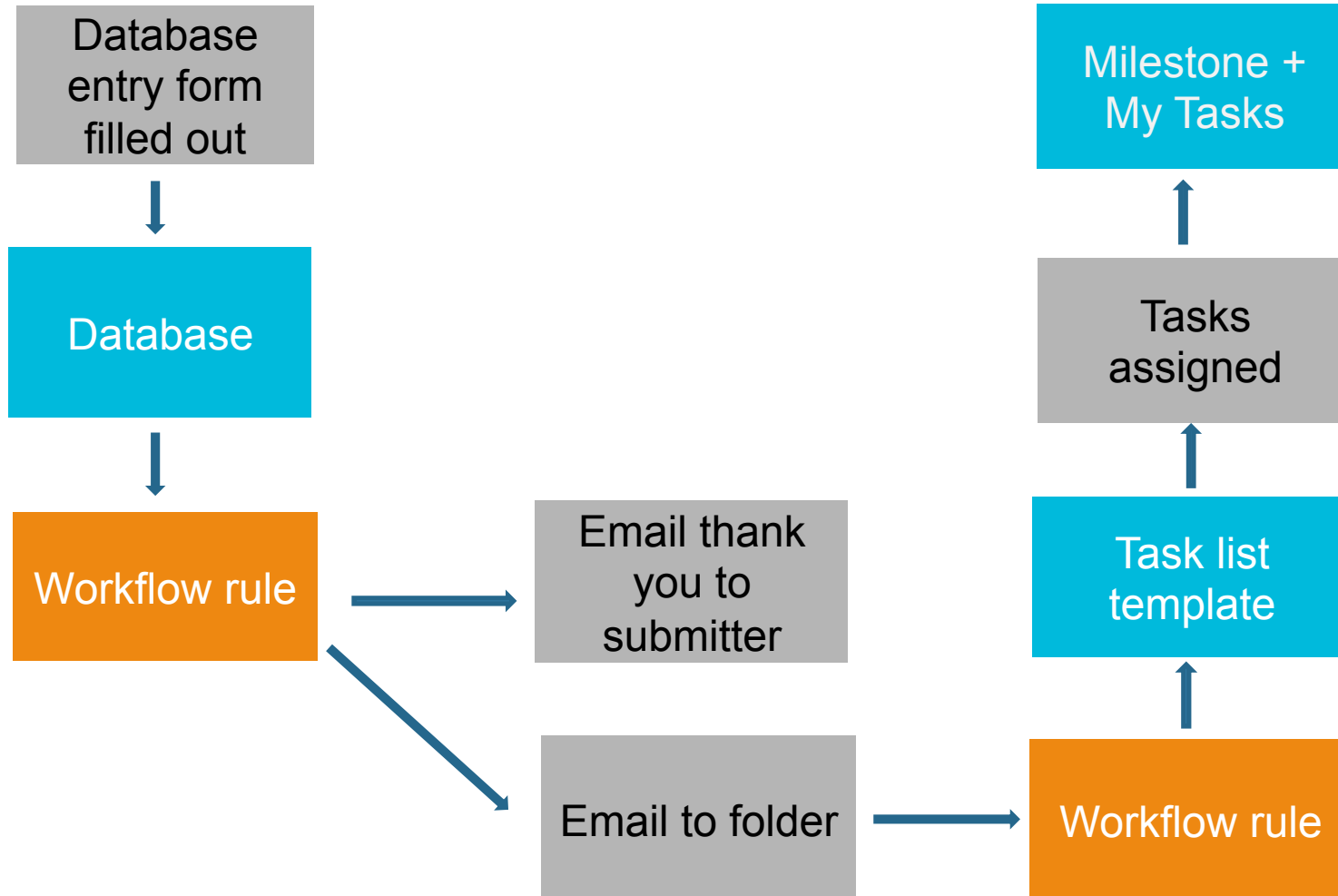
Due Date	Requested By	Type of Project Requested	Name of Department	Phone Number	Email	Additional notes	Request Status
Oct 25, 2012	Susan	Audio	Dramatic	654-654-5489	susanfujiki@gmail.com	Here are some notes	New
Oct 26, 2012	Fred	Print		661-578-9675	fred@hotmail.com	I would love to write lots of notes here but I would prefer it if you called me. Thanks.	New
Oct 26, 2012	Susan	Audio	Dramatic	654-654-5489	susanfujiki@gmail.com	Here are some notes	New
Oct 17, 2012	Susan	Print	Creative	818-987-5687	susanfujiki@gmail.com	I need this project asap. Thanks.	New
Oct 24, 2012	Kate	Design	Creative	818-987-5687	susanfujiki@gmail.com	I need this project asap. Thanks.	New
Oct 24, 2012	David Solis	Print	Hospitality	859-987-6546	sfujiki@gmail.com		New
Oct 13, 2012	Sarah White	Audio	Dramatic		sfujiki@centraldesktop.com		New

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INCREASE  
AUTOMATION  
MAKE THE SYSTEM  
WORK FOR YOU

# Increase automation



# What's the story?

Employee fills out new employee form. Thank-you notification is emailed and HR then has to manually add tasks to a workspace.

The screenshot shows a workspace titled "Intranet Project" with two buttons: "New Milestone" and "New Task List". On the left, there are sections for "Task Lists" and "Milestones". The "Task Lists" section includes "Inbox (2)", "Tasks by Assignee", "Tasks by Tag", "Employee Directory (1)", and "New employee (3)". The "Milestones" section includes "New Employee Tasks" and "New Employee Tasks (4)". The main area displays a task list titled "New Employee Tasks > New Employee Tasks" with a "Create New Task..." input field and a "More options" button. Below this is a table with a "Title" column and four tasks:

	Title
<input type="checkbox"/>	1 - Create a new folder for new employee
<input type="checkbox"/>	2. Give them all the paperwork
<input type="checkbox"/>	3. Follow up on paperwork
<input type="checkbox"/>	4. Edit task list name to reflect new employee name

Let's increase automation by automatically assigning HR new tasks to be completed when a new form is filled out.



# Increase automation

## Make the system work for you

- Enter a record into a database
- Record is emailed into a folder
- Workflow rule assigned a set series of tasks

Thank-yous and new assignments all in one!





# Increase automation

Create a **task list template** in company settings

## Company Settings

- General
- Internal Members
- Groups
- Custom Fields
- Task Templates**
- Look & Feel
- Reports
- Advanced

[« Back to All Templates](#)

### HR tasks Template

Create New Task...

⊕ More options

Title
4. Assign names to tasks and edit accordingly
3. Follow up on paperwork
2. Give them all the paperwork
1 - Create a new folder for new employee



# Increase automation

Go to **folder** and create workflow rule to trigger task list

**Create Workflow Rule - New Workflow Rule**

**Rule Name**  
Start HR task list

**Rule Type**

- Email Notification  
Allows you to send out an automated email notification when something happens
- Task Creation**  
Allows you to create a task when something happens
- Action  
Allows you to update or set a field value
- Create Proof  
Allows you to create a new proof when something happens

**Criteria**

Apply to

- Items not in Folders
- HR Folder**
- Masters
- New Employees Folder

Ctrl + Click to select multiple Virtual Folders are excluded.

**When File is**

- Uploaded/Created
- Modified
- Deleted
- Checked Nightly
- Moved In
- Moved Out

Additional Criteria

**Notification**

Insert Variable  
Select a Workflow Variable

**Task Title**  
[##\$WORKSPACE\_NAME##] File ##\$TITLE## has been ##\$ACTIONED##

**Task Description**  
This notification has been sent to you because the file ##\$TITLE## has been ##\$ACTIONED## in this directory.  
To view this file click here:  
##\$URL##

**Assign To**  
Susan Fujiki

Start typing to select users  
 and Subscribe these Members to the File or Discussion. (this will not remove any existing subscribers)

**TIP:**  
Select assignees here for tasks.



# Increase automation

Create workflow rule in **folder** to trigger task list (cont)

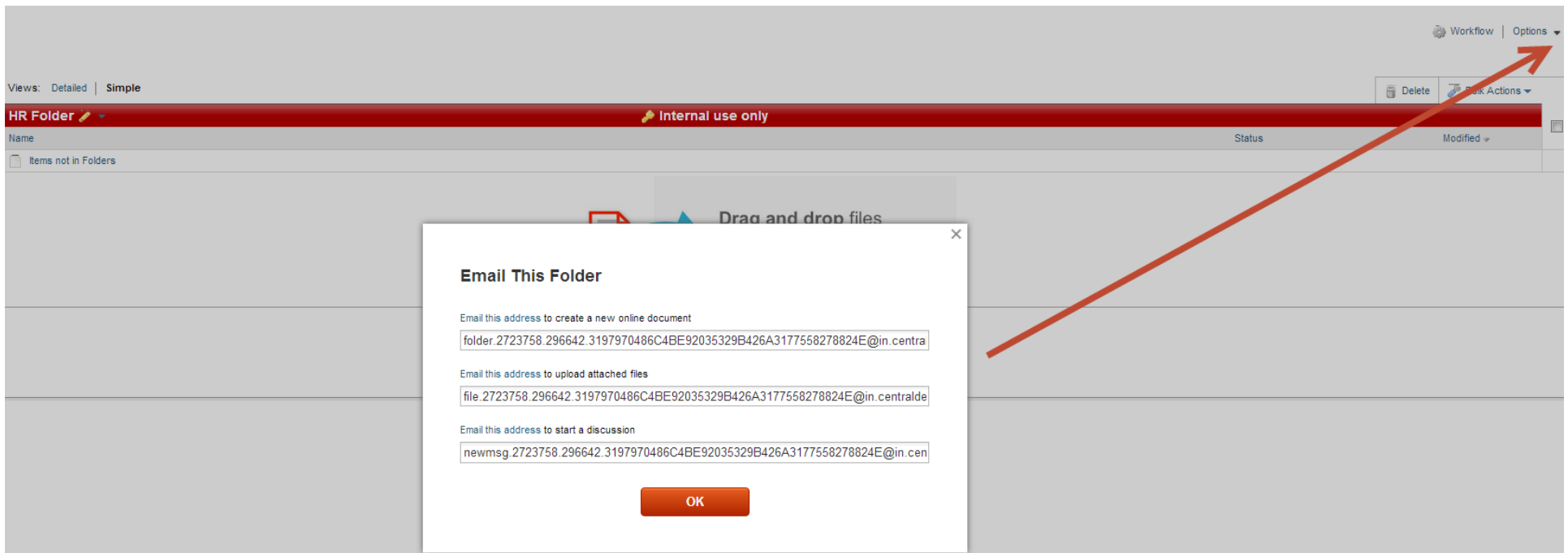
The image shows a workflow rule configuration interface with a 'New Task List' dialog box overlaid. The background interface includes sections for 'Assign To', 'CC To', 'Start Date', 'Due Date', 'Task List', 'Tags', and 'Priority'. The 'Task List' section has a link 'Create a New Task List' which is highlighted by a red arrow. The 'New Task List' dialog box contains the following fields:

- Name: New Employee Tasks
- Related Milestone: New Employee Tasks
- Options:  Internal Use Only?,  Add tasks from a template
- HR tasks: HR tasks
- Start date: Oct 16, 2012
- Buttons: Create, Cancel



# Increase automation

Copy online document [email address](#) for the same [folder](#).



**TIP:** Make sure [noreply@centraldesktop.com](mailto:noreply@centraldesktop.com) is added as a user to the workspace



# Increase automation

Go to [database](#) and create workflow rule.

**TIP:**  
Add variables and custom HTML to template as shown in previous examples

The screenshot shows the 'Create Workflow Rule - New Workflow Rule' interface. Red arrows point to the following elements:


- Rule Name:** 'When new record is added, email to folder'
- Rule Type:** 'Email Notification' (selected)
- Criteria:** 'When Record is' with 'Added' checked.
- Notification:** 'Notify Whom' field containing an email address.
- Notification:** 'Email Template Subject' and 'Email Template Message' fields.




# Increase automation: Level up







The employee created the record and has been thanked. A tasklist has been added to a milestone, and assignees to the tasks have been automatically assigned.

Increase automation.  
Increase awareness.

New Employee Tasks > New Employee Tasks 

Create New Task..

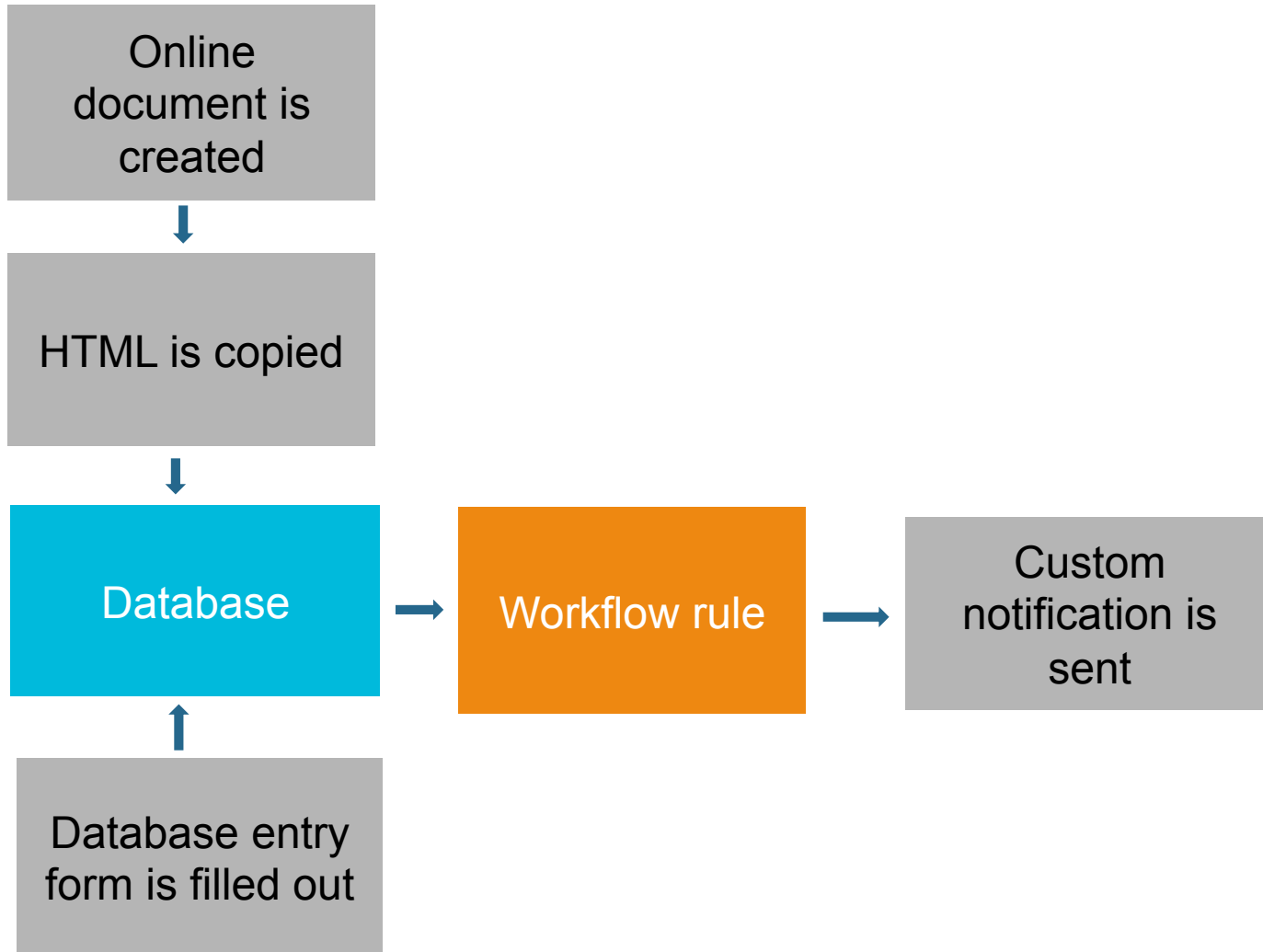
 More options

 Title 	Assigned to	Start	Due
<input type="checkbox"/>  1 - Create a new folder for new employee	Susan Fujiki	-	Oct 17, 2012
<input type="checkbox"/>  2. Give them all the paperwork	Susan Fujiki	-	Oct 17, 2012
<input type="checkbox"/>  3. Follow up on paperwork	Susan Fujiki	-	Oct 19, 2012
<input type="checkbox"/>  4. Edit task list name to reflect new employee name	Susan Fujiki	-	-



**INCREASE INTEREST**  
**NO MORE BORING**  
**NOTIFICATIONS**

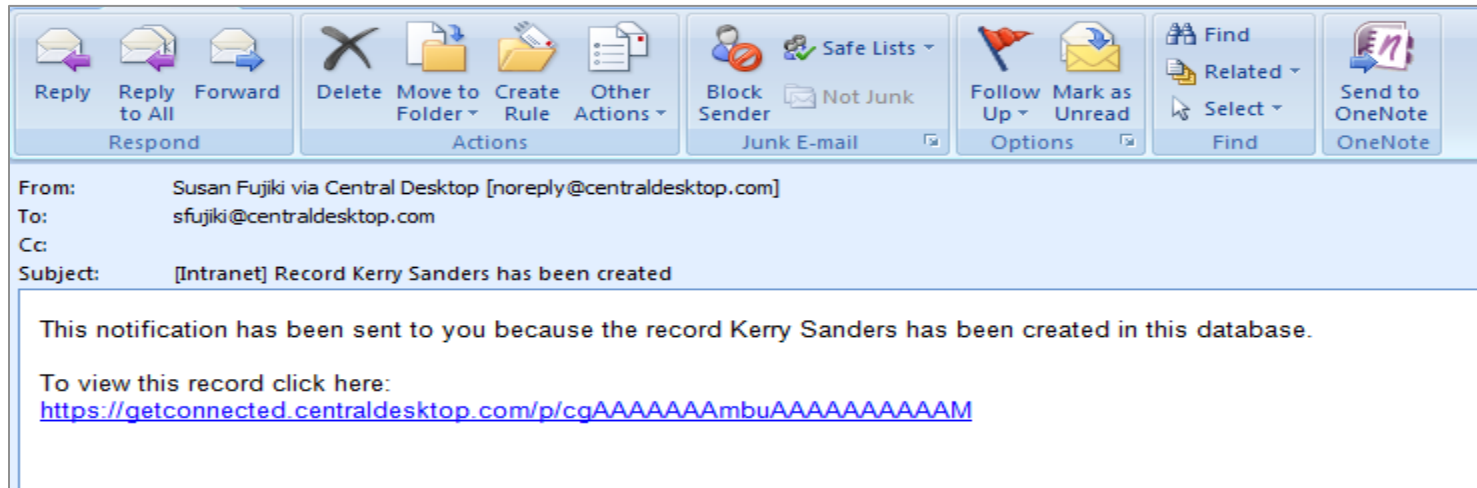
# Increase interest





# What's the story?

A new employee fills out a new employee profile and is thanked for doing so via system notification, but the notification isn't interesting.



Let's increase interest!



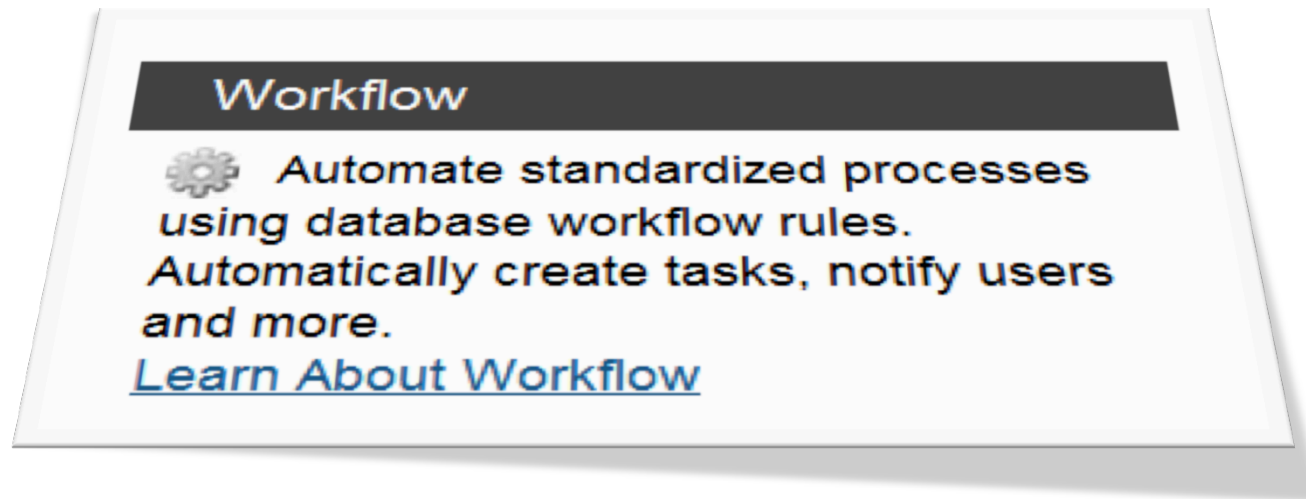
# Increase interest

No more boring notifications

- Add databases
- Add some code
- Add some automation

So many emails everyday.

Get your notifications noticed!



# Increase interest

Create [database](#)

Create [database entry form](#) for the employee to fill out

« Back to Employee Directory Database

### Employee Directory - Add Record

**Save** Cancel

Fields Marked with a \* are required

\* Full Name

Company

\* Primary Email

Work - Address

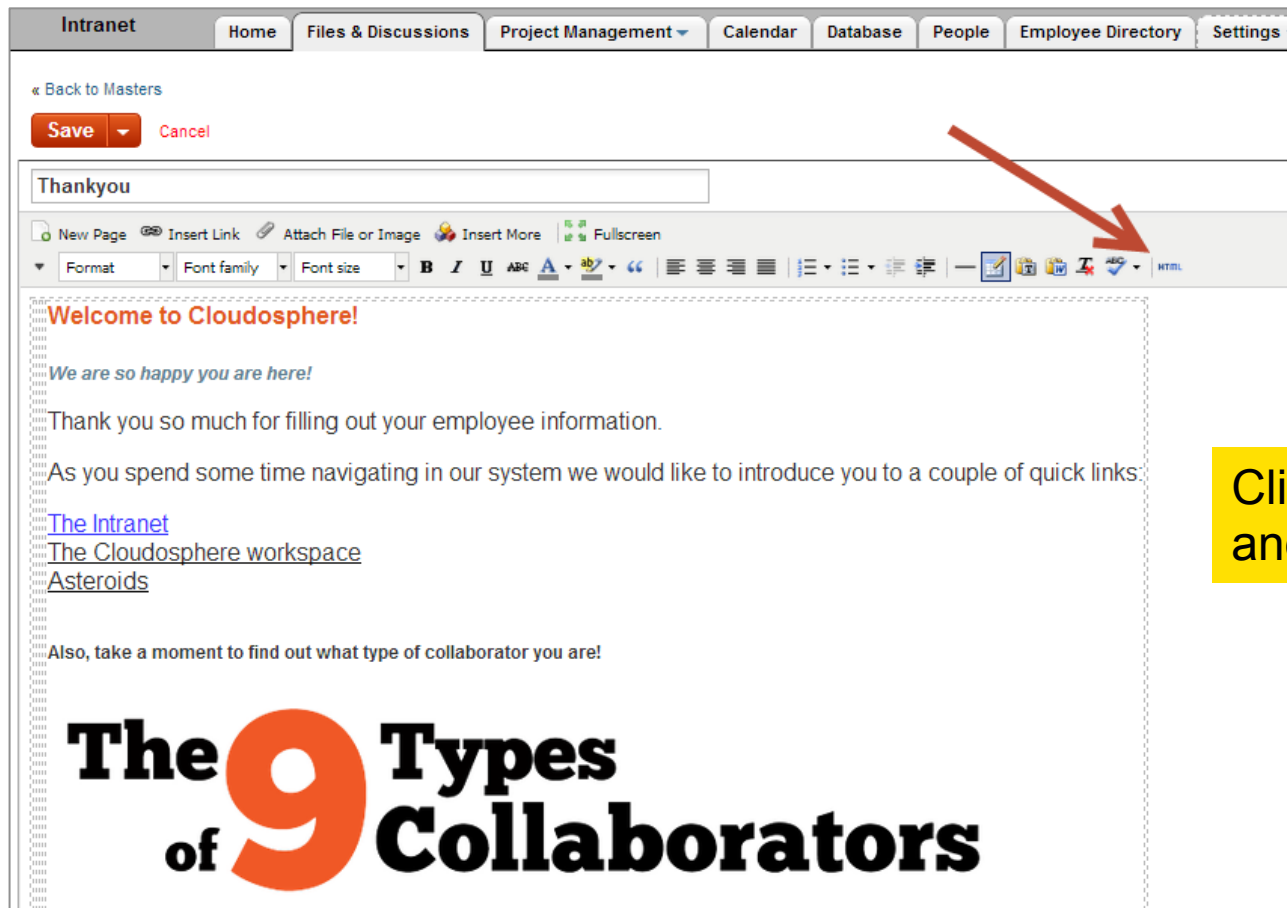
\* Work Phone

Home - Address



# Increase interest

Convert an online document to **HTML** in **Files & Discussions**



The screenshot shows an Intranet interface with a navigation bar at the top containing 'Home', 'Files & Discussions', 'Project Management', 'Calendar', 'Database', 'People', 'Employee Directory', and 'Settings'. Below the navigation bar is a 'Back to Masters' link and a 'Save' button. The main content area is titled 'Thankyou' and contains a rich text editor. The editor's toolbar includes options for 'New Page', 'Insert Link', 'Attach File or Image', 'Insert More', and 'Fullscreen'. A red arrow points to the 'HTML' button in the toolbar. The document content includes a heading 'Welcome to Cloudosphere!', a sub-heading 'We are so happy you are here!', a paragraph 'Thank you so much for filling out your employee information.', another paragraph 'As you spend some time navigating in our system we would like to introduce you to a couple of quick links:', and three links: 'The Intranet', 'The Cloudosphere workspace', and 'Asteroids'. At the bottom of the document, there is a heading 'Also, take a moment to find out what type of collaborator you are!' followed by a large graphic that reads 'The 9 Types of Collaborators'.

Click to convert and copy code.



# Increase interest

Create email notification workflow rule in **database**

**TIP:**  
Make sure to choose  
Email Format as HTML

Create Workflow Rule - New Workflow Rule

Rule Name:

Rule Type:  Email Notification  
Allows you to send out an automated email notification when something happens  
 Task Creation  
Allows you to create a task when something happens  
 Action  
Allows you to update or set a field value  
 Create Proof  
Allows you to create a new proof when something happens

Criteria:  When Record is Added  Modified  Deleted  Checked Nightly  
[Additional Criteria](#)

Notification

Notify Whom:   
 and Subscribe these Members to the Database Record. (this will not remove any existing subscribers)

Notify Non-Workspace Email Addresses:

Notify Record Variables:  
 Primary Email  Secondary Email  
 Created By  Modified By

Email Format:  
 Plain Text  HTML

Available Merge Fields:

Email Template Subject:

Email Template Message:  
You can now use HTML tags in your email  

```
<table>
<tbody>
<tr>
<td>
</td>

```



# Increase interest

When a record is added, a notification will be sent that looks like this.

From: Susan Fujiki via Central Desktop [noreply@centraldesktop.com]  
To: sfujiki@centraldesktop.com  
Cc:  
Subject: [Cloudosphere] Record Oct 23, 2012 has been created

Hi Sarah White

**Welcome to Cloudosphere!**

*We are so happy you are here!*

Thank you so much for filling out your employee information.

As you spend some time navigating in our system we would like to introduce you to a couple of quick links:

[The Intranet](#)  
[The Cloudosphere workspace](#)  
[Asteroids](#)

Also, take a moment to find out what type of collaborator you are!

**The 9 Types of Collaborators**

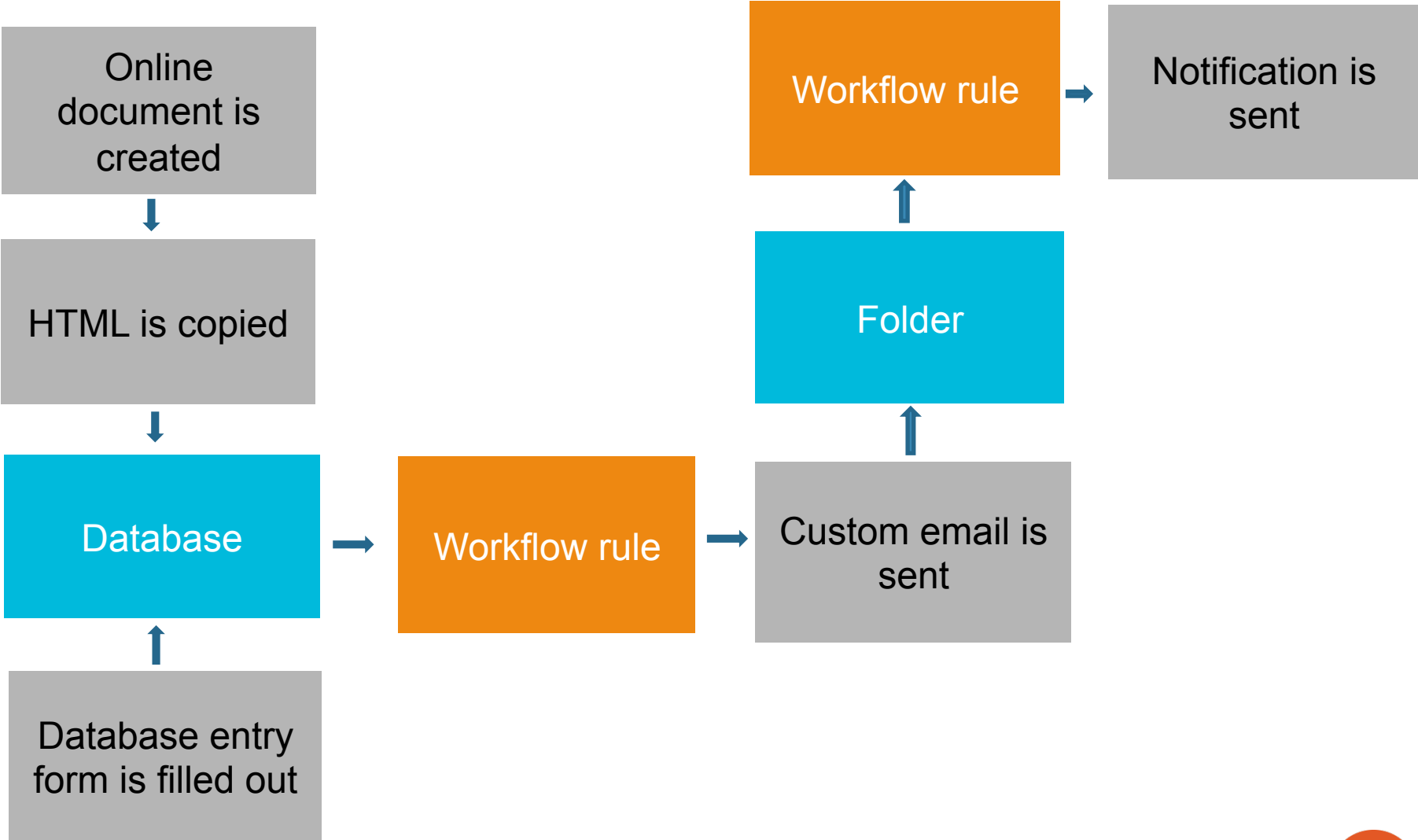


Thanks so much for joining our team!



BUT I HAVE ONE  
MORE EXAMPLE TO  
SHOW YOU  
AND IT'S A DOOZY

# Increase interest, automation and awareness





# What's the story?

A company wants to keep track of the weekly memos that are sent out to all employees. Memos include a custom header and footer and are created automatically after a database entry form is filled out.

Wait, what?

Is that even possible?

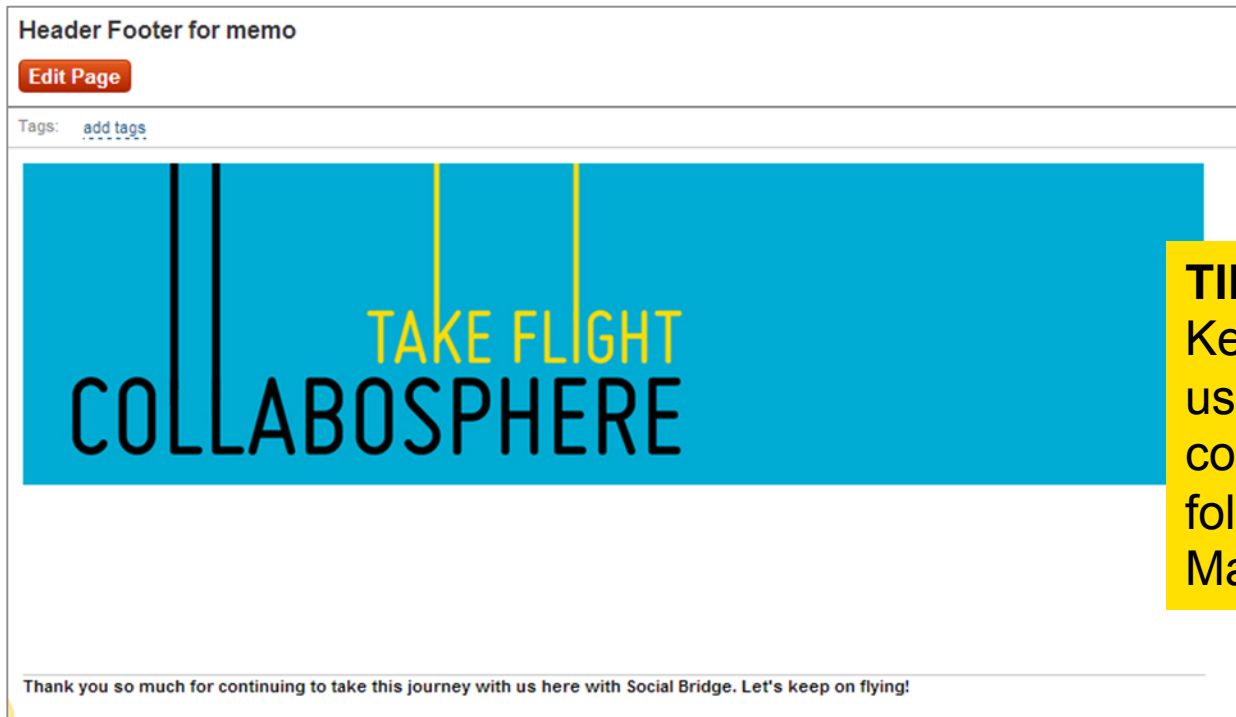
YES IT IS.  
(Combo level up)



# Increase interest, automation and awareness

First up: HTML creation

- Create header and footer in [online document](#)
- Convert to [HTML](#) and copy code



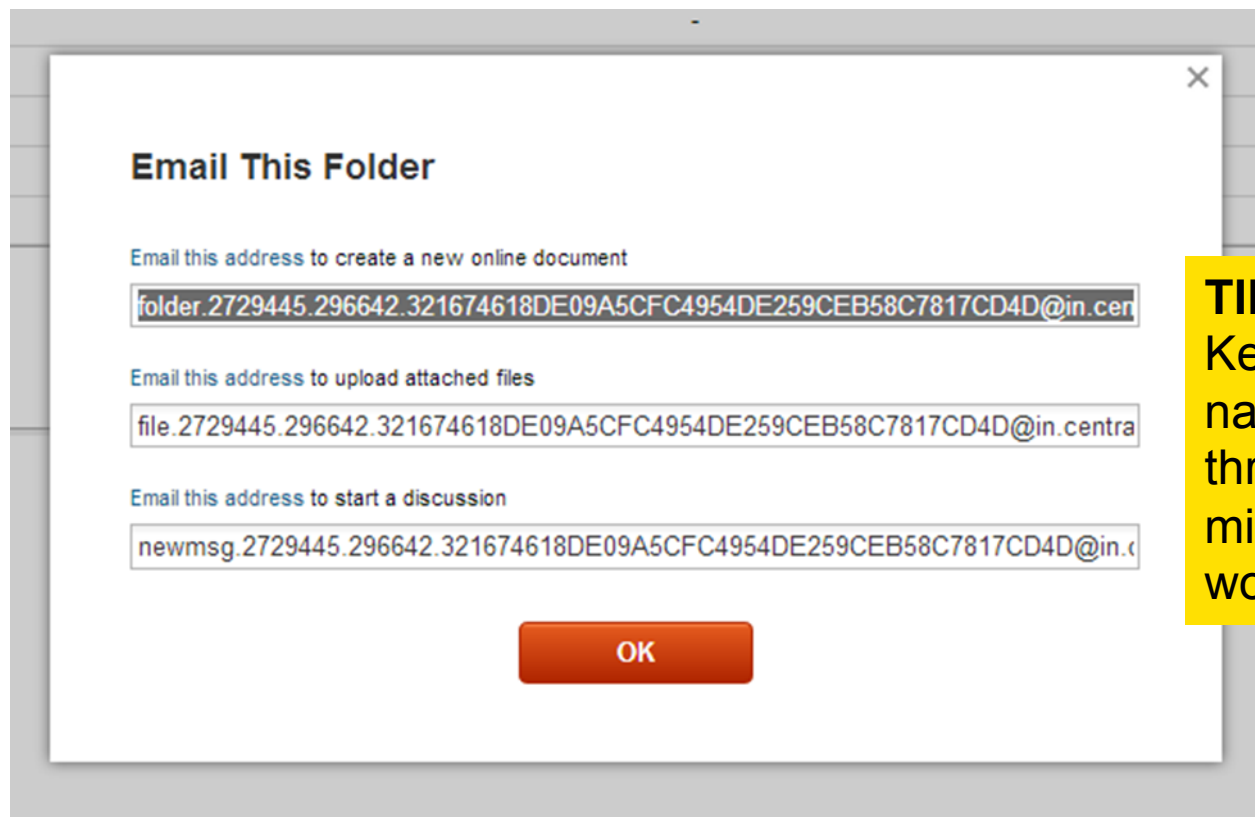
The screenshot shows a web editor interface. At the top, it says "Header Footer for memo" with an "Edit Page" button. Below that is a "Tags: add tags" section. The main content area features a blue banner with the text "TAKE FLIGHT" in yellow and "COLLABOSPHERE" in black. At the bottom, there is a footer text: "Thank you so much for continuing to take this journey with us here with Social Bridge. Let's keep on flying!"

**TIP:**  
Keep all masters used for HTML conversion in a folder called Masters



# Increase interest, automation and awareness

- Create a folder called **Memos**
- Get “online documents” **email address** for **folder**



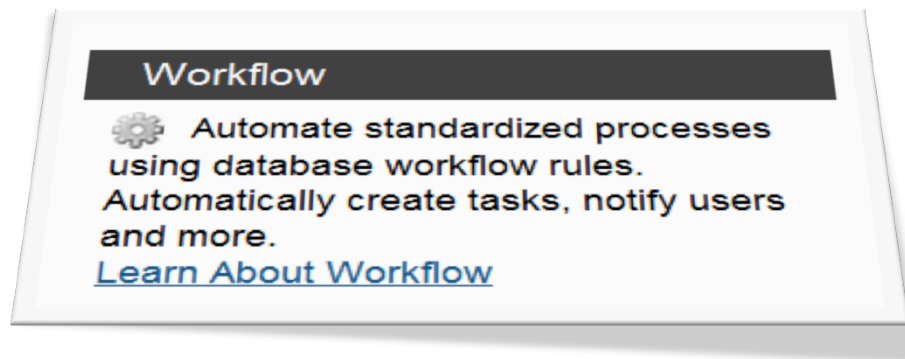
**TIP:**  
Keep a standard naming convention throughout folders, milestones and workflow rules.




# Increase interest, automation and awareness

Next steps: [database](#) workflow

Create a database and then a database rule to email a new request into a folder. The email will be using the HTML we just created to create an online document.



**Workflow**

 Automate standardized processes using database workflow rules. Automatically create tasks, notify users and more.

[Learn About Workflow](#)



# Increase interest, automation and awareness

- Create **database**
- **Fields** will be used in the online document

« Back to Memo Requests Database

### Memo Requests - Add Record

**Save** Cancel

Fields Marked with a \* are required

<b>* Date of Submission</b> <input type="text" value="Oct 11, 2012"/>	<b>Name</b> <input type="text" value="Susan Fujiki"/>
<b>Department</b> <input type="text"/>	<b>Topic 1</b> <input type="text"/>
<b>Topic 2</b> <input type="text"/>	<b>Topic 3</b> <input type="text"/>
<b>Additional Notes</b> <input type="text"/>	



# Increase interest, automation and awareness

Create email notification workflow rule in [database](#)

**Notify Non-Workspace Email Addresses** Enter email addresses separated by a comma

folder.2729445.296642.321674618DE09A5CFC4954DE259CEB58C7817CD4D@in.centraldesktop.com

**Notify Record Variables**

Name  Created By  
 Modified By

**Email Format**

Plain Text  HTML

Available Merge Fields

Date of Submission  ###\$DATE\_OF\_SUI

**Email Template Subject**

Memo ###\$DATE\_OF\_SUBMISSION\_LH355X4K321677864Q###

**TIP:**  
What do you want the subject to say? Choose variables to reflect that.






# Increase interest, automation and awareness

When a record is added, it becomes an online document that looks like this:

Memo Oct 12, 2012

[Edit Page](#)

Tags: [add tags](#)



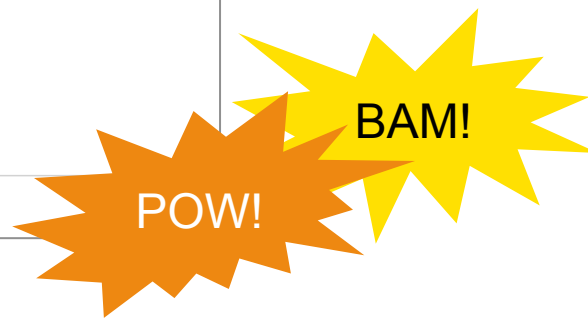
We need more coffee

We need more sleep

We need more unicorns

Hello everyone!  
Here are some notes for us to look at in this email with our complex workflow.  
Check it out and ask questions if you have some.  
Susan

Thank you so much for continuing to take this journey with us here with Social Bridge. Let's keep on flying!





# Increase interest, automation and awareness

But that's not enough. We want even more increased interest PLUS even more increased automation!

So far:

- A record has been added to a database
- Fields from the record have been automatically added to a customized email.
- The record is emailed to a folder within SocialBridge.
- The email becomes an online document

Next step:

Create a rule to automatically notify users when the new online document has been added.



# Increase interest, automation and awareness

## Create Email Notification rule in Files & Discussions

**Rule Name**

Active  Inactive

**Rule Type**

- Email Notification**  
Allows you to send out an automated email notification when something happens
- Task Creation**  
Allows you to create a task when something happens
- Action**  
Allows you to update or set a field value
- Create Proof**  
Allows you to create a new proof when something happens

**Criteria**

Apply to

- Items not in Folders
- HR Folder
- Masters
- Memos
- New Employees Folder

Ctrl + Click to select multiple Virtual Folders are excluded.

When File is

- Uploaded/Created
- Modified
- Deleted
- Checked Nightly
- Moved In
- Moved Out

[Additional Criteria](#)

**Notification**

Notify Whom

Susan Fujiki x

Start typing to select users

and Subscribe these Members to the File or Discussion. (this will not remove any existing subscribers)

Notify Non-Workspace Email Addresses Enter email addresses separated by a comma

### TIP:

- Choose the correct folder
- Edit the Email Template Subject. Ex: "This week's update"
- Choose all relevant subscribers.



# Increase interest, automation and awareness

That's it!

A notification will now be sent to all users when the new online document has been created (emailed) in the folder.

- Database record created
- Online document created
- Team members notified

INTEREST INCREASED  
AWARENESS INCREASED  
AUTOMATION INCREASED



**KNOCK  
OUT**

This deck will be made available to attendees shortly.

There is a lot to remember so please feel free to use this as your cheat-sheet.





THANK YOU FOR  
FLYING WITH US.

GET READY FOR  
YOUR NEXT  
ADVENTURE



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