EXPERT SHORTCUTS CHEATSHEET

HIDDEN GEMS

Format pages
Customize front page / add blocks, tables etc / HighlightCell or App Block / Toolbar – first box, choose Format / Save

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

Member Directory Application Block
Insert Member Directory application block / Select workspace or company / THIN / Group as desired / Filter as desired / Insert

CD Sidebar
My Dashboard / "Dock Recent Activity to your screen. Try CD Sidebar"

Database Subscriptions
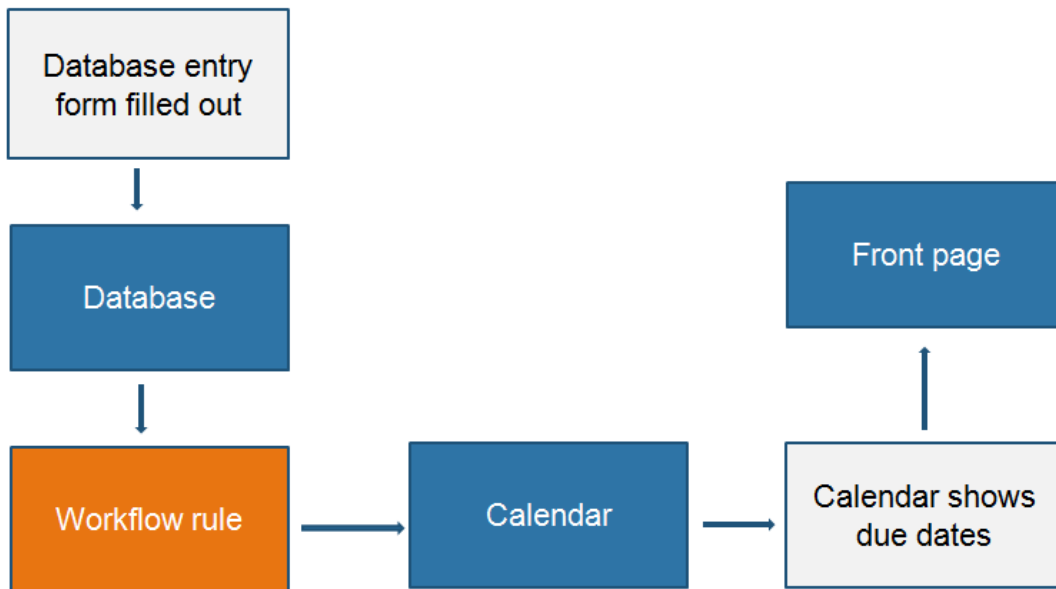Actions / Subscriptions – for members -> cc for non members

Update URLs
Workspace Settings / Name & Description / URL / Change URL / Add new name

COMBOS

Increase Awareness

Database entry form filled out

Database

Workflow rule

Calendar

Calendar shows due dates

Front page
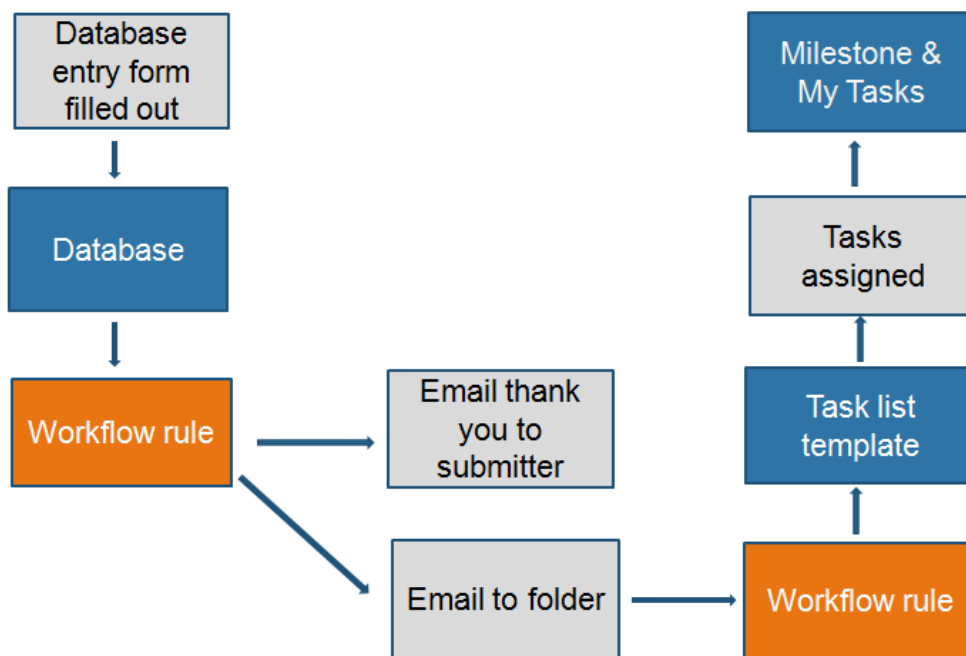
1. Database: Workflow / Rule name "Add date to calendar" / Rule Type (Task) / Criteria (added) / Notification (due date) – *this is the variable* / Due Date (Set Date to Variable)

2. Front page: Add calendar application block.

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Increase Automation

1. Set up task list template: Company Settings / Task Templates / Add Task List Template

2. Add noreply@centraldesktop.com as a new user to workspace

3. Folder to email record to: Options / Email This Folder / copy the text in Email this address to start a discussion

4. Database Workflow Rule: Workflow / Title" When a new record is added, email to folder"/ Rule type – Email / Criteria – Added / Notification – paste the text from step 3 to "notify non-workspace email addresses" / Email Template Message –

select the fields you would like to "Insert into the template" and edit wording as desired.

5. Files and Discussions Workflow rule: Workflow / Title "Start Task List when record is emailed in" / Rule type – Task Creation / Criteria – apply to desired folder / When file is uploaded/created / Assign to – desired person / Task List – New Task List – select Add tasks from a template and select the task list template you require – add start date.
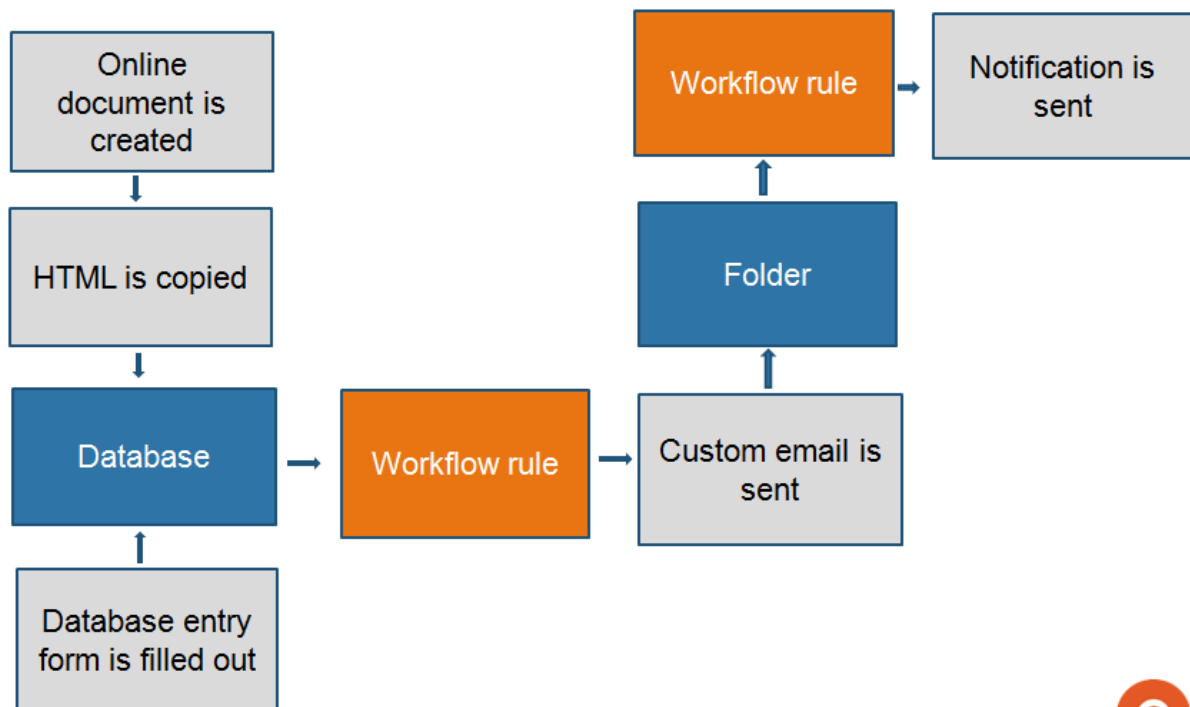
Increase Interest
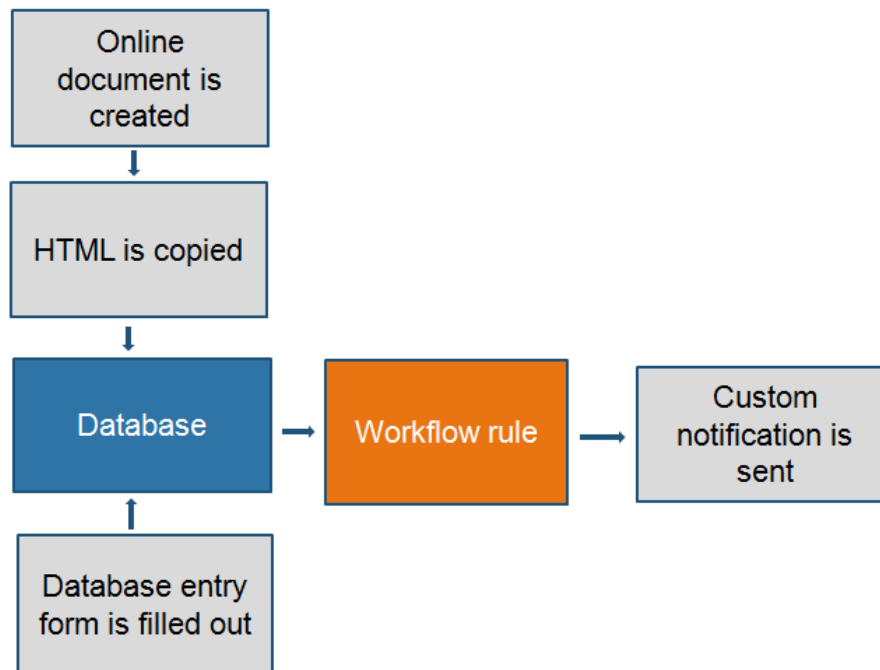
1. Files and Discussions: Online doc / convert to HTML / copy the HTML

2. Database workflow rule: Email notification / When a record is "added" / Notify "created by"/ Email format HTML / Paste HTML code into the Email Template Message box

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Increase Interest, Automation and Awareness

1. Files and Discussions: Online doc / convert to HTML / copy the HTML

2. Files and Discussions: Create a folder / get online docs email address for folder

3. Database workflow rule: Email notification / When a record is "added" / Notify "non-workspace email address" / Copy the folder address/ Email format HTML / Paste HTML code into the Email Template Message box

4. Files and Discussions workflow rule: Email notification / Apply to "name of folder" / When the file is uploaded/created / choose subscribers.