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Your First Five Minutes in Plotwise

SaaS onboarding · Adult (25-40) · Neutral American · 60 seconds

[On screen: the Plotwise home screen]

Welcome to Plotwise. You've just created your account, so let's spend the next few minutes getting you set up to plan your first project.

Start by looking at the left side of your screen. This is your sidebar. Everything you build in Plotwise lives here: your projects, your shared boards, and your archive.

Step one. Click New Project at the top of the sidebar and give it a name. Don't worry about getting it perfect. You can rename it any time.

Step two. Add your first task. Type it in the box that says What needs doing? and press Enter.

Step three. Invite one person. Click the Share button in the top right corner and enter their email address.

That's it. You now have a project, a task, and a teammate. In the next video, we'll look at due dates and reminders.

Setting Up Two-Step Sign-In

Settings how-to · Adult (30-45) · Neutral American · 90 seconds

[On screen: the Account Settings page in Corvata]

In this lesson, you'll turn on two-step sign-in for your Corvata account. It takes about two minutes, and it's one of the simplest ways to protect your work.

Here's how it works. When you sign in, you'll enter your password as usual. Then Corvata will ask for a short code from your phone. Even if someone learns your password, they can't get in without that code.

Let's set it up.

First, click your profile picture in the top right corner and choose Account Settings.

Next, select the Security tab. You'll see a section called Two-Step Sign-In. Click Turn On.

Corvata will show you a square code on the screen. Open the authenticator app on your phone, tap Add Account, and point your camera at the code.

Your phone will now show a six-digit number. Type that number into the box on your screen and click Verify.

Finally, Corvata will give you a list of backup codes. Save these somewhere safe, like a password manager or a printed copy in a drawer. If you ever lose your phone, a backup code will get you back in.

And you're done. The next time you sign in on a new device, you'll be asked for a code. It's a small extra step, and it keeps your account yours.

Introducing Smart Filters

Feature launch · Adult (25-40) · Neutral American · 30 seconds

[On screen: the Driftnote inbox with a new filter bar]

Meet Smart Filters, now in Driftnote.

Instead of scrolling for that one note from last Tuesday, just type what you remember. A name, a word, even roughly when you wrote it. Driftnote narrows the list as you type.

You'll find Smart Filters at the top of your notes list. Give it a try the next time you're hunting for something.

When the Sync Icon Turns Red

Troubleshooting · Adult (30–45) · Neutral American · 90 seconds

[On screen: a red sync icon in the corner of the Tallybook app]

If the sync icon in the corner of Tallybook has turned red, your latest changes haven't reached the cloud yet. Your work is still saved on this device, so nothing is lost. Let's get it moving again.

Start with the simplest check. Is your device online? Open a web page in your browser. If it doesn't load, reconnect to your network and wait about thirty seconds. In most cases, the icon turns green on its own.

If you're online and the icon is still red, click it. A small panel will open and tell you what's wrong. The most common message is Sign-in expired. Click Sign In Again, enter your password, and syncing will pick up where it left off.

If the message says Storage full, your plan has run out of space. You can delete old files from the Archive folder, or ask your account owner about more storage.

Still red? Close Tallybook completely and open it again. This clears most temporary glitches.

If none of these steps help, click Contact Support in the same panel. Tallybook will attach a short report automatically, so you won't have to explain everything from scratch.

Building Your First Invoice

App walkthrough · Adult (30-45) · Neutral American · 2 minutes

[On screen: the Ledgerlark dashboard]

In this video, you'll create and send your first invoice in Ledgerlark. By the end, you'll know how to add a customer, list your work, and get paid online.

From the dashboard, click the green Create button and choose Invoice.

[On screen: a blank invoice]

At the top, you'll see a field called Customer. Start typing your customer's name. If they're new, click Add New Customer and fill in their name and email address. Ledgerlark will remember them for next time.

Now look at the Due Date. By default, it's set to thirty days from today. If you'd like to be paid sooner, click the date and choose a new one.

Next, it's time to list what you're charging for. Click Add Line Item. In the Description box, type a short, clear description, like Kitchen cabinet repair, or Logo design, first draft. Then enter the quantity and the price. Ledgerlark works out the total for you.

Need to add another item? Click Add Line Item again. You can drag items up and down to change the order.

If you charge sales tax, click the Tax box on each line and choose your rate. You only have to set up a rate once.

At the bottom, there's a Notes field. This is a good place to thank your customer or remind them how to reach you.

Before you send anything, click Preview. This shows the invoice exactly as your customer will see it. Check the spelling of their name, the amounts, and the due date.

Happy with it? Click Send. Your customer will get an email with a link to view the invoice and pay by card or bank transfer.

And that's your first invoice. You can see its status any time on the Invoices page.

Module 1: Getting Around the Dashboard

Course introduction · Adult (30-45) · Neutral American · 60 seconds

[On screen: Module 1 title card]

Welcome to Module 1 of Getting Started with Brightdesk. This module is about finding your way around.

Brightdesk has a lot of features, and it's normal to feel a bit lost the first time you log in. By the end of this module, that feeling should be gone.

Here's what you'll be able to do.

First, name the four main areas of the dashboard and explain what each one is for.

Second, open a customer ticket, read its history, and return to your queue.

Third, use the search bar to find any ticket, customer, or article in a few seconds.

This module takes about fifteen minutes. There's a short knowledge check at the end, and you can pause and come back whenever you like.

When you're ready, click Next to begin.

Sharing a Folder Without Oversharing

Settings how-to · Adult (25-40) · Neutral American · 60 seconds

[On screen: a folder in Clovebox]

Sharing a folder in Clovebox takes a few clicks. Sharing it with only the right people takes one extra look. Here's how to do both.

Right-click the folder and choose Share. In the box that appears, enter the email addresses of the people you want to invite.

Now, before you click Send, look just below the email box. You'll see a setting called Link Access. If it says Anyone with the link, then anyone who gets hold of that link can open your folder, even if you never invited them.

For most work, change this to Only people invited. It's a small change that keeps forwarded links from traveling too far.

Next to each name, you can also choose Can view or Can edit. Give edit access only to people who really need it.

Then click Send. You can change these settings any time from the same menu.

Support Call: The Missing Export Button

Troubleshooting, scenario · Adult (25-40) · Neutral American · 90 seconds

Cast: AGENT CUSTOMER

Scenario: a customer calls Harborsheet support

AGENT Thanks for calling Harborsheet support, this is Dana. What can I help with today?

CUSTOMER Hi. I need to send a report to my manager in about ten minutes, and the Export button has just vanished. It was there yesterday.

AGENT Okay, let's find it for you. Can you tell me which screen you're on right now?

CUSTOMER The Reports page. I've got the monthly sales report open.

AGENT Great. Look at the top right corner of the report. Do you see three small dots next to the Share button?

CUSTOMER Yes.

AGENT Click those. In our last update, Export moved into that menu to make room for the new Share button.

CUSTOMER Oh. There it is. Well, that's annoying, but thank you.

AGENT I hear you. A lot of people have been looking for it this week. When you click Export, you can choose a spreadsheet or a PDF. For a manager, PDF usually looks tidier.

CUSTOMER PDF it is. Done. It's downloading now.

AGENT Perfect. Is there anything else I can help with while I've got you?

CUSTOMER No, that's everything. You've saved my morning.

AGENT Happy to help. Good luck with the report.

Scheduling Posts in Queueboard

App walkthrough · Young adult (18-25) · Neutral American · 2 minutes

[On screen: the Queueboard calendar view]

Let's schedule a week of posts in Queueboard. Once you've done it once, it takes about ten minutes every Monday, and then you can forget about it.

You're looking at the calendar view. Each column is a day, and each colored block is a post that's already scheduled.

To add a new post, click any empty spot on the calendar. The post editor opens.

At the top, choose which accounts this post should go to. You can pick one or several. Queueboard shows a small preview for each, so you can see how the post will look on every platform.

Now write your caption in the big text box. If it's too long for one of your accounts, you'll see a red number counting how many characters you're over.

To add a photo or video, drag it into the box, or click Add Media and pick it from your computer.

Next, set the time. You can choose an exact time yourself, or click Best Time. Queueboard looks at when your followers have been most active over the last month and suggests a slot.

When it looks right, click Schedule. Your post drops into the calendar.

Here's a tip. If you want to reuse a post later, open it and click Duplicate. Change the date and a word or two, and you're done.

And if plans change, just drag a post to a different day. Queueboard updates the time automatically.

That's scheduling. In the next video, we'll look at the Reports tab and find out which of these posts people actually liked.

What's New in Version 6

Feature launch · Adult (30-45) · Neutral American · 90 seconds

[On screen: Fernwork Version 6 title card]

Fernwork Version 6 is here. Here's a quick look at what's changed, and where to find it.

First, the change you asked for most. Search is faster. A lot faster. Results now appear as you type, and they include comments and attachments, not just file names.

Second, there's a new home screen. When you open Fernwork, you'll see the files you worked on most recently, the ones shared with you this week, and anything waiting for your review.

Third, comments now support replies. Click Reply under any comment to keep a conversation in one place, instead of scattered down the page.

Fourth, you can now set your working hours in Settings, under Notifications. Fernwork won't send you alerts outside those hours, unless someone marks a message as urgent.

And finally, a small one that makes a big difference. You can now undo a deleted file for thirty days, right from the Trash folder.

Version 6 is rolling out to everyone this week. If you don't see the new home screen yet, restart the app.

Full release notes are in the Help menu. Thanks for using Fernwork.

Knowledge Check: Permissions and Roles

Knowledge check · Adult (25-40) · Neutral American · 60 seconds

[On screen: Knowledge Check]

Let's check what you've learned about roles in Brindle HR.

Here's the situation. A new team leader, Priya, needs to approve her team's time-off requests. She should not be able to see anyone's salary information. Which role should you give her?

Is it A, Viewer. B, Manager. Or C, Administrator?

[Pause for learner response]

The answer is B, Manager.

A Viewer can see the team calendar, but can't approve anything. An Administrator can approve requests, but also sees payroll and salary details, which Priya doesn't need.

The Manager role gives her exactly what she needs. She can approve time off and edit schedules for her own team, and nothing more.

Remember the rule from this module. Give each person the smallest role that lets them do their job. You can always add more access later.

Product Demo: Kestrel Field Service

Product demo · Adult (35-55) · Neutral American · 2 minutes

[On screen: a van parked outside a house]

It's eight in the morning. Your technician, Marco, is in the van outside his first job. Let's

see what his day looks like with Kestrel Field Service.

[On screen: the Kestrel mobile app]

Marco opens the Kestrel app on his phone. His jobs for the day are already there, in order, with the drive time between each one. The office set this up last night, and if anything changes, his list updates on its own.

He taps the first job. He can see the customer's name, the address, the equipment on site, and notes from the last visit. Last time, someone noted a loose panel on the unit. So Marco brings the right bracket in with him.

When he's done, he takes two photos, writes a quick note, and asks the customer to sign on his screen. The job is marked complete, and the office sees it right away.

[On screen: the Kestrel office dashboard]

Now let's look at the office. Your scheduler, Jen, can see every technician on a live map. When an urgent call comes in, Kestrel shows her who's closest and who has a gap in their day. She drags the job onto Marco's schedule, and it appears on his phone.

At the end of the day, every finished job is ready to invoice. No more chasing paper forms or trying to read handwriting.

That's the idea behind Kestrel. Your technicians spend less time on the phone with the office, and more time fixing things.

To see Kestrel with your own jobs and your own team, book a demo at the link below.

Resetting a Forgotten Password

Troubleshooting · Any · Any · 30 seconds

[On screen: the Northpane sign-in page]

Forgot your Northpane password? No problem.

On the sign-in page, click Forgot password. Enter the email address you use for Northpane and click Send Link.

Open the email from us and click the link inside. If you don't see it within a few minutes, check your spam folder.

Choose a new password, confirm it, and you're back in.

Admin Onboarding: Inviting Your Team

SaaS onboarding · Adult (30-45) · Neutral British · 90 seconds

[On screen: the Quillspace admin console]

You've set up your Quillspace organisation. Now it's time to bring your team in. This video covers inviting people one at a time, inviting a whole team at once, and choosing what they can see.

To invite one person, go to the Admin Console and select People. Click Invite, enter their work email address, and choose a team for them. They'll receive an email with a link to join.

If you're inviting more than a handful of people, there's a quicker route. Click the arrow next to Invite and choose Upload a List. Quillspace gives you a template spreadsheet. Fill in one row per person, with their name, email address and team, then upload it. You'll see a summary before anything is sent, so you can check for typos.

Now, a word about teams. Every person in Quillspace belongs to at least one team, and teams decide which spaces people can see. If you set these up properly now, you won't need to adjust access person by person later on.

Once your invitations have gone out, keep an eye on the Pending column. It shows who hasn't joined yet, and you can resend a reminder with one click.

That's it for invitations. Next, we'll set up single sign-on, so your team can log in with their existing work accounts.

Connecting Your Calendar

Integrations how-to · Adult (25-40) · Neutral American · 60 seconds

[On screen: Plotwise Settings, Integrations tab]

When you connect your calendar to Plotwise, your task due dates appear right next to your meetings. Here's how to set it up.

Open Settings and choose the Integrations tab. Find Calendar and click Connect.

You'll be taken to your calendar provider's sign-in page. Sign in, and on the permissions screen, click Allow. This lets Plotwise add events to your calendar, but it can't read your email or your contacts.

Back in Plotwise, choose which calendar you'd like to use. If you have a work calendar and a personal one, pick the work one.

Finally, decide on one-way or two-way sync. One-way puts your tasks on your calendar. Two-way also lets you move a task by dragging it on your calendar.

Click Save, and give it a minute. Your tasks will start to appear.

Buddy Walkthrough: Clocking In on Shiftly

App walkthrough, scenario · Young adult (18-25) · Neutral American · 2 minutes

Cast: TRAINER NEW HIRE

Scenario: a break room before a morning shift

TRAINER Morning. First shift, right? Have you got the Shiftly app on your phone yet?

NEW HIRE I downloaded it last night, but I haven't really opened it.

TRAINER No problem. Open it up. You should have an email from us with your login details.

NEW HIRE Okay. I'm in. It's showing a big green button that says Clock In.

TRAINER That's the one. But don't tap it yet. See the little pin at the top? Shiftly only lets you clock in when you're inside the store. It checks your location.

NEW HIRE So I can't clock in from the parking lot?

TRAINER Nope. Believe me, people have tried. Walk through the front doors first, then tap Clock In.

NEW HIRE Got it. What about breaks?

TRAINER When you go on break, tap Start Break. When you come back, tap End Break. If you forget, it won't lose your time, but your manager gets a notice to fix it, and they'll come and find you.

NEW HIRE Noted. And how do I see my shifts for next week?

TRAINER Tap Schedule at the bottom. It shows the whole week. If you can't make a shift, tap it and choose Offer Shift. Someone else can pick it up, and a manager approves the swap.

NEW HIRE That's actually easier than I expected.

TRAINER It's pretty good. One more thing. At the end of your shift, tap Clock Out before you leave the building. If you walk out first, it'll ask you why, and it's a whole thing.

NEW HIRE Clock out inside. Got it.

TRAINER Okay. It's two minutes to eight. Go ahead and clock in, and I'll show you the stockroom.

Customizing Your Notifications

Settings how-to · Adult (30-45) · Neutral American · 60 seconds

[On screen: a phone buzzing with alerts]

If Corvata is buzzing your phone every few minutes, you're not alone. Let's set things up so you only hear about what matters.

Open Settings and tap Notifications.

You'll see three groups. Mentions, Updates, and Reminders. Mentions are when someone types your name. Updates are changes to anything you follow. Reminders are due dates.

For most people, the best setup is this. Leave Mentions and Reminders on. Change Updates to Daily Summary. Instead of a ping for every edit, you'll get one tidy email each afternoon.

You can also set Quiet Hours at the bottom of the page. Choose a start and end time, and Corvata will hold everything until the morning.

If something urgent comes in during Quiet Hours, teammates can still reach you by marking their message as urgent.

Your changes save automatically. Enjoy the quiet.

Course Summary: Working with Reports

Course summary · Adult (35-55) · Neutral American · 90 seconds

[On screen: Course Summary]

You've reached the end of Working with Reports in Harborsheet. Let's take a moment to look back at what you've covered.

In the first module, you learned the difference between a table and a report. A table holds your data. A report tells a story about it.

In module two, you built your first report from scratch. You chose your data, grouped it by month, and added a total at the bottom.

Module three was all about charts. You learned when a bar chart works best, when to use a line chart, and why a pie chart with twelve slices helps nobody.

In module four, you added filters, so the people reading your report can look at their own region or their own team without asking you for a new version.

And in the final module, you shared your report and set it to refresh every morning, so it's never out of date.

That's a lot of ground. If any part still feels shaky, every module is available in the course menu, and you can revisit it any time.

Your next step is the final assessment. It has ten questions and takes about fifteen minutes. When you pass, your certificate will be emailed to you.

Thanks for learning with us. Now go build something useful.

Dark Mode and Display Settings

Settings how-to · Young adult (18-25) · Australian · 30 seconds

[On screen: the Driftnote app in bright white]

Working late? Let's give your eyes a break.

In Driftnote, open Settings and tap Display. Under Theme, choose Dark. If you'd rather it follow your phone, pick Match System instead.

While you're there, try the Text Size slider. Drag it until your notes feel comfortable to read, and check the colour preview underneath.

That's it. Easy on the eyes.

Processing a Refund at the Register

Point-of-sale training · Adult (25-40) · Neutral American · 90 seconds

[On screen: the Tillwise register home screen]

In this lesson, you'll learn how to process a refund on the Tillwise register. Refunds can feel stressful the first few times, especially with a line behind you, so we'll go step by step.

First, ask the customer for their receipt. If they have one, tap Returns on the home screen, then tap Scan Receipt and scan the barcode at the bottom.

Tillwise will show every item from that sale. Tap the item, or items, the customer is returning. Check the item in front of you matches what's on the screen.

Next, choose a reason from the list, like Damaged, Wrong Size, or Changed Mind. This helps the store track why things come back.

Now tap Refund. Tillwise will refund the money to the same card or payment method the customer used. If they paid cash, the drawer will open with the amount shown on screen.

No receipt? Tap No Receipt instead. Depending on store policy, you may need a manager to enter their code before you continue.

Here's a tip. While the refund is processing, tell the customer what's happening. Something as simple as, That's going back to your card now, it can take a few days to show up, saves a lot of worry later.

Finally, hand the customer their refund slip and thank them for coming in.

Troubleshooting Slow Load Times

Troubleshooting · Adult (30-45) · Neutral American · 2 minutes

[On screen: a spinning loading wheel in Fernwork]

If Fernwork is taking a long time to load, or pages freeze when you open them, this video will help you find the cause. We'll start with the most common fixes and work our way down.

Check one. Your connection. Open a speed test site in your browser. If your speed is much lower than usual, the problem is probably your network, not Fernwork. Try moving closer to your router, or plugging in with a cable if you can.

Check two. Too many tabs. Every open browser tab uses memory. If you have twenty tabs open, close the ones you don't need and try again. You'd be surprised how often this is the answer.

Check three. Clear your browser's cache. Over time, your browser stores old copies of pages that can slow things down. Open your browser's settings, find Privacy, and choose Clear browsing data. Tick Cached images and files, then click Clear.

Check four. Very large files. If only one file is slow, it may simply be big. Files with thousands of rows or dozens of large images take longer to open. Try splitting it into smaller files.

Check five. Is it just you? Visit our Status page, linked in the Help menu. If there's a known problem on our side, you'll see it there, along with updates on when it will be fixed.

If you've tried all five and Fernwork is still slow, contact our support team. Let them know which of these checks you've already done. It'll save you both time.

Welcome to Harborsheet

SaaS onboarding · Adult (30-45) · Neutral American · 3 minutes

[On screen: the Harborsheet welcome screen]

Welcome to Harborsheet. Over the next few minutes, you'll learn the three ideas that make Harborsheet work, and you'll build your first sheet. You don't need any experience with spreadsheets to follow along.

Let's start with the ideas.

Idea one. Everything in Harborsheet is a record. A record is one thing you want to keep track of. A customer. An order. A piece of equipment. Each record gets its own row.

Idea two. Records have fields. A field is a detail about the record, like a phone number, a price, or a due date. Each field gets its own column. The difference from a normal spreadsheet is that Harborsheet knows what type of information each field holds. A date field only accepts dates. A price field only accepts numbers. That means fewer mistakes.

Idea three. Views. A view is a different way of looking at the same records. You can see them as a grid, a calendar, a board of cards, or a map. Changing the view never changes the data. It just shows it differently.

[On screen: a blank sheet]

Now let's put those ideas to work. Imagine you run a small bakery, and you want to track custom cake orders.

Click New Sheet and call it Cake Orders.

In the first column, type the customer's name. Harborsheet has already made this a text

field.

Click the plus sign to add a second column. Name it Pickup Date, and choose Date as the field type.

Add a third column called Flavor. For this one, choose Single Select. Now you can type in your flavors once, chocolate, lemon, carrot, and pick from a list every time after that. No more typos.

Add one more column, called Status, also Single Select, with three options. Ordered. Baking. Ready.

Now add two or three orders so you have something to look at.

[On screen: switching to the board view]

Here's where views come in. Click Add View and choose Board. Group the board by Status. Your orders now appear as cards in three columns. When a cake goes into the oven, drag its card from Ordered to Baking.

Switch to a Calendar view, and you'll see every pickup laid out by date.

Same records, three ways to see them.

That's the heart of Harborsheet. In the next lesson, we'll share your sheet with a coworker and set up a reminder for the day before each pickup.

Feature Tour: The Timeline View

Product demo · Adult (30-45) · Neutral American · 60 seconds

[On screen: the Plotwise Timeline view]

This is the Timeline view in Plotwise. It shows every task in your project as a bar across the calendar, so you can see the whole plan at once.

The length of each bar is how long the task should take. To change it, grab the end of the bar and drag.

See the thin lines connecting some of the bars? Those are dependencies. This one means the design can't start until the research is finished. If the research slips a few days, Plotwise moves the design back to match, and shows you what else is affected.

The red line running down the page is today. Anything to the left of it that isn't finished will turn orange, so late tasks are hard to miss.

To open the Timeline, click Views at the top of any project and choose Timeline.

Importing Data from a Spreadsheet

App walkthrough · Adult (35-55) · Neutral American · 3 minutes

[On screen: the Brindle HR People page]

If you're moving to Brindle HR from another system, you probably have your employee records in a spreadsheet. In this video, you'll import that spreadsheet in one go, and learn how to avoid the three problems that trip most people up.

Before you start, open your spreadsheet and check two things.

First, make sure the top row contains column headings, like First Name, Last Name,

Email, and Start Date. Brindle uses these headings to understand your data.

Second, save the file in CSV format. In most spreadsheet programs, you'll find this under File, then Save As, or Download.

Now let's import.

In Brindle HR, go to the People page. Click the Import button in the top right corner, and choose your CSV file.

[On screen: the column-matching screen]

Brindle will now show you a matching screen. On the left are the columns from your spreadsheet. On the right are the fields in Brindle. Most will match automatically, and you'll see a green tick next to them.

If a column hasn't matched, you'll see a yellow warning. Click the drop-down next to it and choose the right Brindle field. For example, your spreadsheet might say Mobile, where Brindle says Phone Number.

If there's a column you don't need, choose Skip this column.

When everything is matched, click Preview. Brindle will show you the first ten records exactly as they'll be saved. Look through them carefully.

Now, here are the three problems we mentioned.

Problem one. Dates. If your start dates look wrong in the preview, for example, the fourth of March has become the third of April, your spreadsheet is using a different date order. Go back one step and change the Date Format setting to match your file.

Problem two. Duplicates. If someone already exists in Brindle, the import will skip them

by default. If you'd rather update their record with the new information, tick Update existing records before you continue.

Problem three. Missing emails. Every person in Brindle needs an email address. Rows without one will be listed in red. You can fix them in your spreadsheet and try again, or import the rest and add those people by hand.

When the preview looks right, click Import. Depending on the size of your file, this can take a minute or two.

When it's finished, you'll see a summary showing how many records were added, updated, and skipped. Click Download Report to keep a copy.

That's it. Your team is in Brindle HR.

Scanning Receipts on the Go

Mobile app walkthrough · Adult (25-40) · Neutral American · 60 seconds

[On screen: the Ledgerlark mobile app]

Lost receipts are the enemy of every expense report. With the Ledgerlark app, you can capture them the moment you get them.

Open the app and tap the camera button at the bottom of the screen.

Lay the receipt on a flat surface in good light, and hold your phone straight above it. When the edges turn green, the app takes the photo for you.

Ledgerlark reads the receipt and fills in the store name, the date, and the total. Check them, and correct anything it got wrong.

Then choose a category, like Travel or Meals, and tap Save.

The receipt is now attached to your account, and you can throw the paper one away. At the end of the month, your expenses are already waiting for you.

Webinar Demo: Automations Explained

Product demo, scenario · Adult (30-45) · Neutral American · 3 minutes

Cast: HOST SPECIALIST

Scenario: a recorded product webinar for Brightdesk

HOST Welcome back, everyone. We've had a lot of questions about automations, so I've asked Sam from our product team to walk us through them. Sam, let's start simple. What is an automation?

SPECIALIST It's a rule you set up once, so Brightdesk does a task for you every time. It always has two parts. A trigger, which is when something happens. And an action, which is what Brightdesk does about it.

HOST Can you give us an example?

SPECIALIST Sure. Let's say a customer emails and the subject line contains the word refund. That's the trigger. The action is, send that ticket straight to the billing team.

HOST Instead of someone reading it and passing it on.

SPECIALIST Exactly. Let me show you. I'm going to click Settings, then Automations, then New Rule.

HOST And there's a blank rule on screen now.

SPECIALIST Right. At the top, it says When. I'll choose A new ticket arrives. Then I click Add Condition, and I choose Subject contains, and type refund.

HOST Okay.

SPECIALIST Now under Then, I choose Assign to team, and pick Billing. I'm also going to add a second action, Add tag, and type refund request, so we can report on these later.

HOST And then you save it?

SPECIALIST Then I save it. Give it a name, Refunds to billing. And it's live.

HOST Wait, that's it?

SPECIALIST That's it. Watch, I'll send a test email from my other account with refund in the subject. And there it is, in the billing queue, tagged.

HOST That's very satisfying. We've got a question from the chat. What happens if two rules conflict?

SPECIALIST Good question. Rules run from top to bottom in the list. So if two rules would assign the same ticket to different teams, the one higher up wins. You can drag them to change the order.

HOST And one more. Is there a way to test a rule without affecting real customers?

SPECIALIST Yes. Before you save, click Test Rule. Brightdesk runs it against your last fifty tickets and shows you which ones it would have matched. Nothing actually changes.

HOST That's really handy. So if people want to try one today, where should they start?

SPECIALIST Pick the one task your team does most often by hand. Usually it's sorting tickets by topic. Build one rule for that, and see how it feels.

HOST Great advice. Thanks, Sam. And for everyone watching, the recording and a written guide to automations will be in your inbox by tomorrow morning.

Keyboard Shortcuts Worth Learning

Productivity tips · Adult (25-40) · Neutral American · 90 seconds

[On screen: Quillspace document editor]

You can do almost everything in Quillspace with a mouse. But if you learn just six keyboard shortcuts, you'll save yourself a surprising amount of time. On a Mac, use the Command key wherever you hear Control.

Number one. Control and K. This opens the quick search. Start typing the name of any page, and press Enter to jump straight there.

Number two. Control and slash. This opens the list of every shortcut, in case you forget the rest of these.

Number three. Control, Shift, and V. This pastes text without any of its original formatting. No more strange fonts from copied emails.

Number four. Control and Enter. When you're writing a comment, this posts it without reaching for the mouse.

Number five. Control and Z. You probably know this one. It undoes your last action. But in Quillspace, you can keep pressing it to go back step by step.

And number six. Control and D. This duplicates the block you're working on. Great for repeating a checklist or a table.

Try one shortcut a day this week. By Friday, your hands will do them without thinking.

Reading the Audit Log

Admin training · Adult (35-55) · Neutral American · 2 minutes

[On screen: the Clovebox admin console]

As an administrator, you'll sometimes need to answer the question, what happened here? Who deleted that file? When did this person's access change? The audit log is where you'll find the answer.

To open it, go to the Admin Console and select Security, then Audit Log.

Each line in the log is one event. You'll see the date and time, the person who did it, what they did, and what it affected. Events are kept for one year.

Let's walk through a real example. A team lead tells you that the Q3 Budget folder has disappeared.

In the search box, type Q3 Budget. The log now shows only events involving that folder.

You can see it was created in July, and shared with the finance team in August. And here, yesterday at four fifteen, it was moved to the trash by a user named Alex.

Now you know what happened. Because it's been less than thirty days, you can restore it from the trash. And you can talk to Alex, who may have had a perfectly good reason.

You can also filter the log by person, by date range, or by type of event. Use the Event Type filter to show only sign-ins, for example, if you're checking for unusual activity.

One more tip. Click Create Alert at the top of the log, and you can ask Clovebox to email you whenever a certain event happens, like a folder being shared outside your company.

Remember, the audit log records what happened, not why. Use it to start a conversation, not to end one.

Help Desk Scenario: Printer Not Found

Troubleshooting, scenario · Mature (55+) · Neutral American · 90 seconds

Cast: TECHNICIAN CALLER

Scenario: an internal IT help desk call at a law office

TECHNICIAN IT help desk, this is Jordan.

CALLER Hi Jordan, it's Walter on the third floor. I'm sorry to bother you, but my computer says it can't find the printer, and I've got documents due out at noon.

TECHNICIAN No bother at all, Walter. Let's sort it out. Can you see the small printer icon near the clock at the bottom of your screen?

CALLER Yes. It's got a little yellow triangle on it.

TECHNICIAN That tells me your computer has lost track of it. Can you click on that icon for me?

CALLER Done. It says Printer offline.

TECHNICIAN Okay. We moved the third-floor printers to a new network over the weekend, so a few people are seeing this today. Click Add a Printer, and look for one called Floor 3 East.

CALLER Floor 3 East. Yes, there it is.

TECHNICIAN Click that, then click Set as Default.

CALLER Okay. Now what?

TECHNICIAN Try printing a single page.

CALLER Hold on. I can hear it going. That's it. It's printing.

TECHNICIAN Brilliant. That was the weekend move, nothing you did.

CALLER Well, I'm glad it wasn't me. Thank you, Jordan.

TECHNICIAN Anytime, Walter. Good luck with those documents.

Offline Mode, Explained

Feature launch · Adult (25-40) · Neutral British · 60 seconds

[On screen: Northpane on a laptop, train window behind]

Northpane now works offline. Here's what that means, and how to make the most of it.

When you lose your connection, on a train or a plane, say, you'll see a small grey cloud at the top of the screen. You can keep working as normal. Every change you make is saved on your device.

When you're back online, the cloud disappears, and Northpane sends your changes to everyone else. If someone else has edited the same paragraph while you were away, you'll see both versions side by side and choose which to keep.

There's one thing to know. Northpane only keeps your most recent files ready offline. To be sure a particular file is available, open its menu and choose Make Available Offline before you travel.

That's all there is to it. Carry on working, wherever you are.

Practice with these, record them, post them as demos or reels, use them in auditions. Please do not resell them as scripts. © VO Journey Academy · avosjourney.com