Wavebox

Powering Productivity

Team Onboarding

Step-by-Step Guide to Setting Up your First Wavebox Team

ONBOARDING MADE SIMPLE

STEP 1

Buy Seats

Setup consolidated billing for all team subscriptions.

STEP 2

Edit Team Details

Edit your business and team names and upload avatars.

STEP 3

Add an Install Template

Choose to include your own template to the install process so your team has everything they need straight away.

STEP 4

Add a Workspace

Choose to share a workspace with your team to collaborate on projects.

STEP 5

Invite your Team

Enter user details and send email invites with install link.

STEP 6

Start Using Connect

Built-in chat, voice/video calls and screenshare without meeting links or codes.

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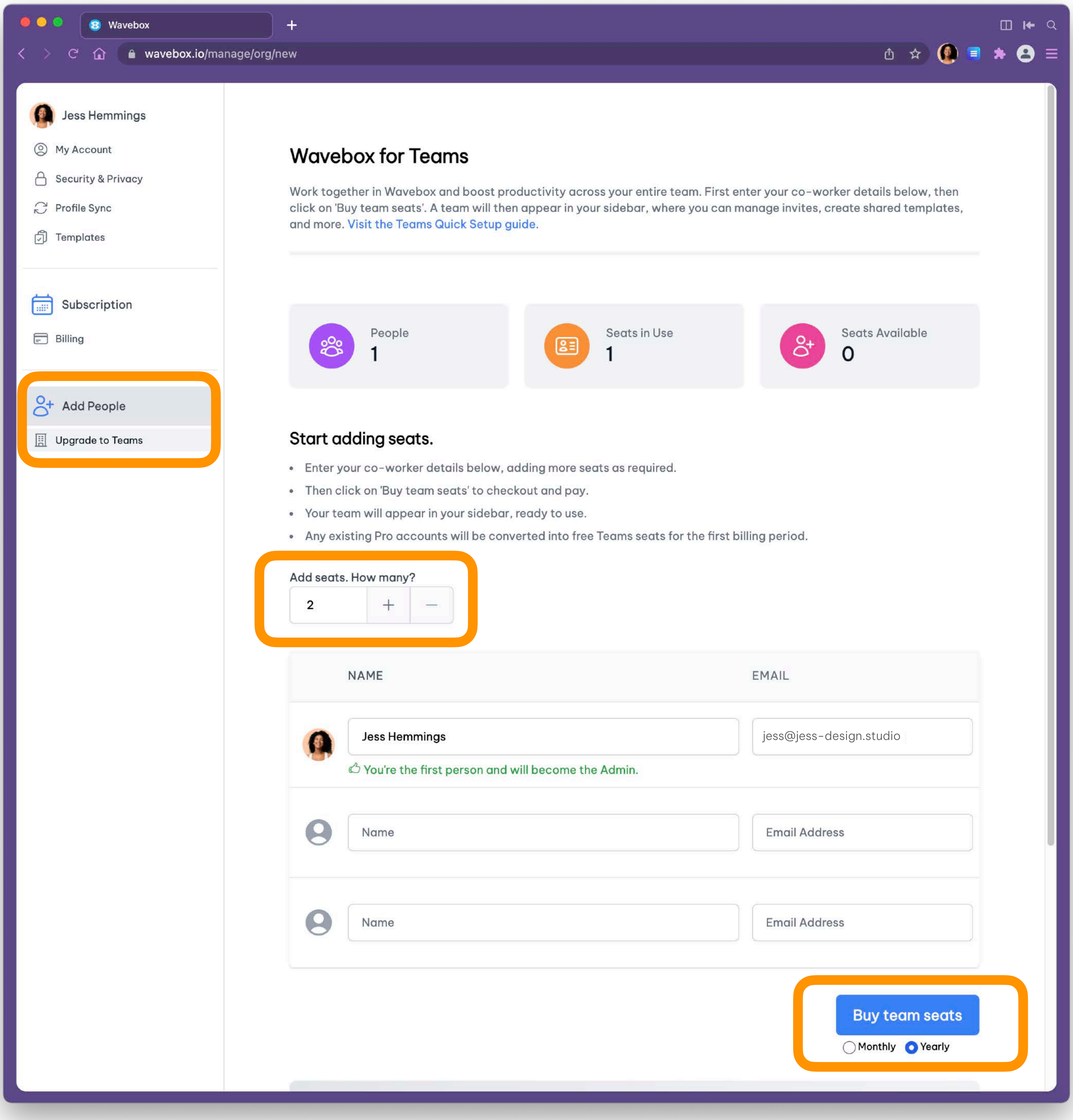
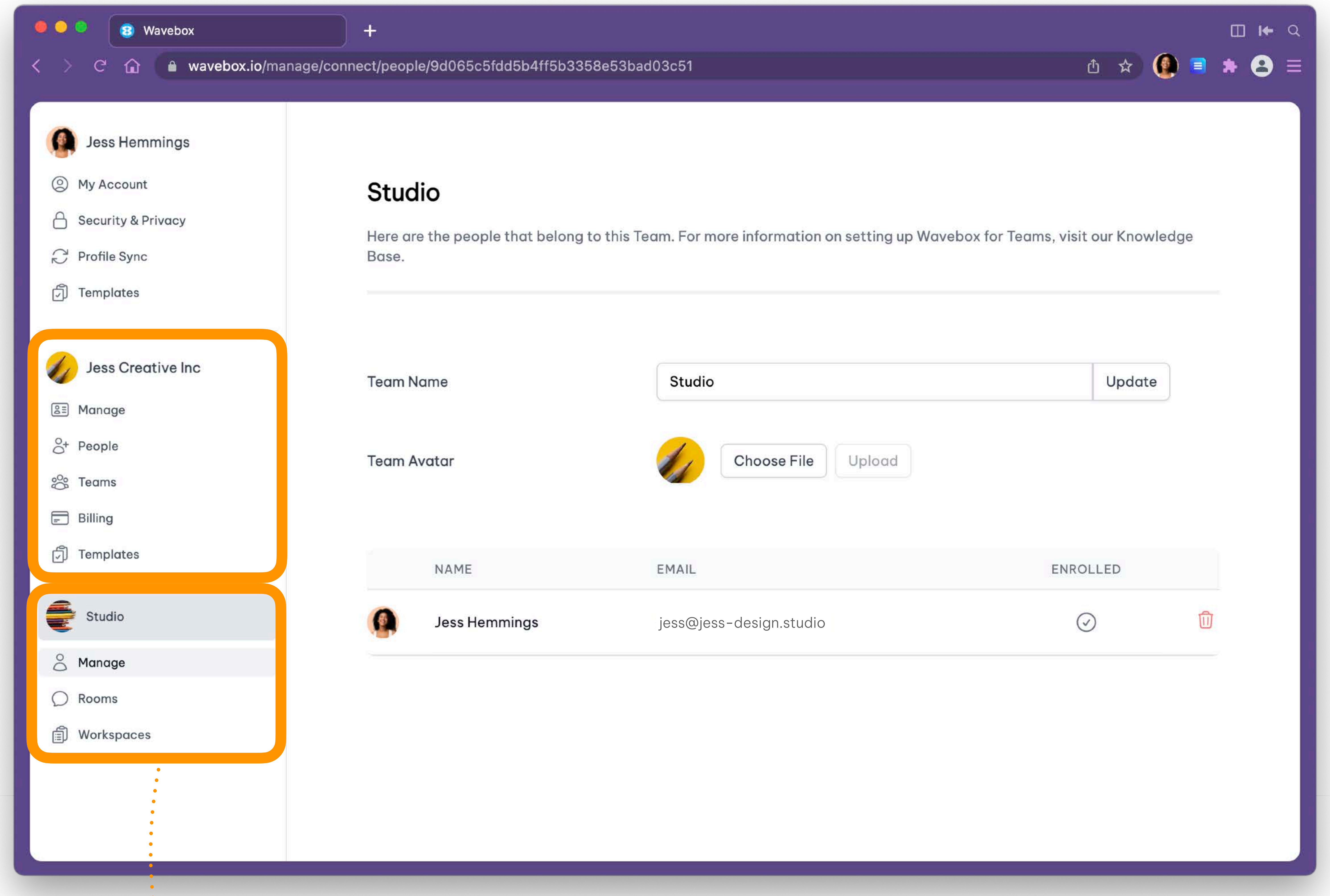
Team Set Up

STEP 1 Buy Seats



- In the Admin Portal, click on **Add People > Upgrade to Teams** in the sidebar menu.
- Use **+** to enter the number of seats you need for your team
- Click on **Buy Seats** to go to the Stripe Billing Portal.
- After buying your seats, a Team will appear in the sidebar of your Admin Portal

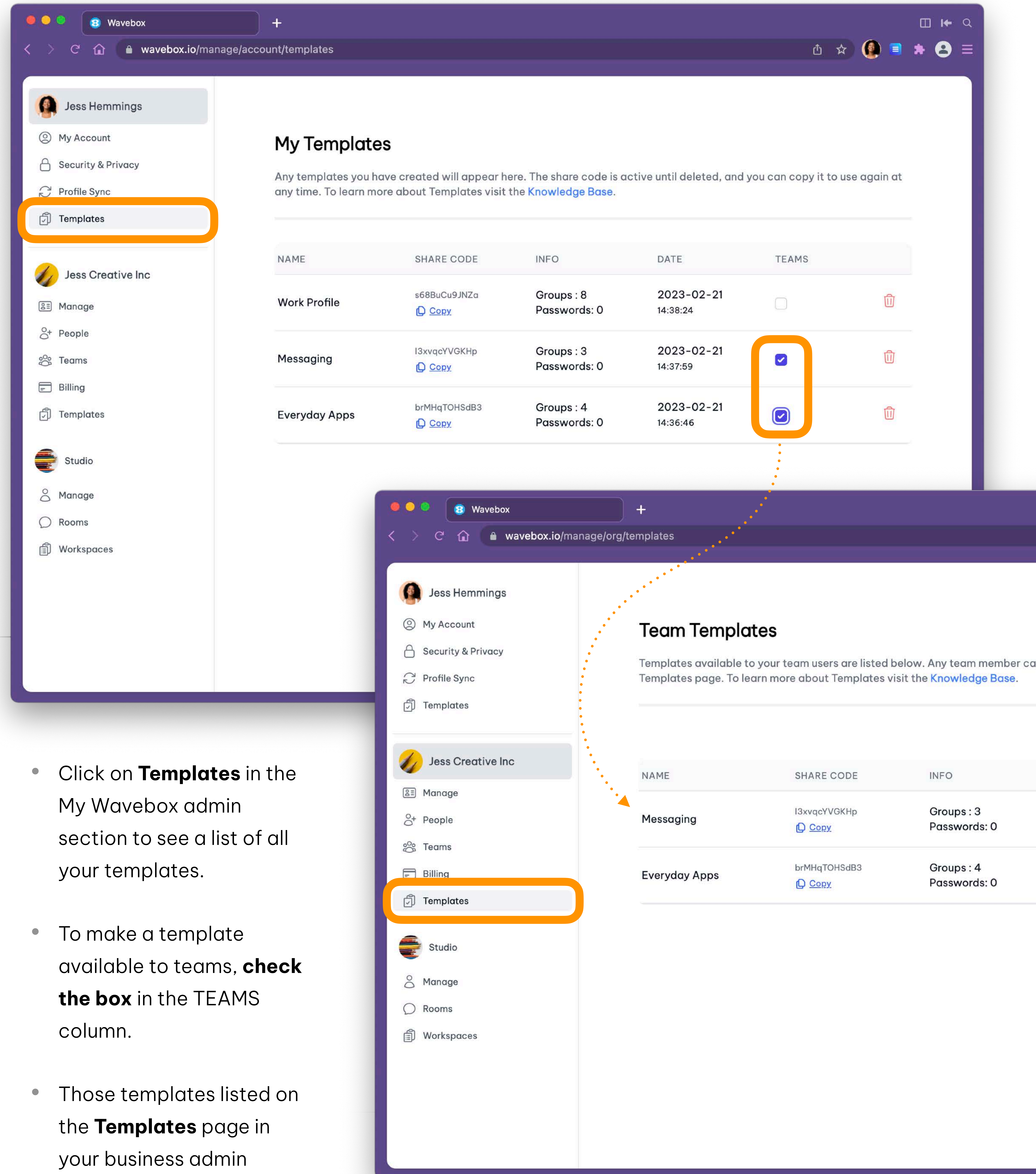
STEP 2 Edit Business and Team Details



After purchasing your seats, you will see two new sections in the sidebar. The first is for your business, and the second is your first team.

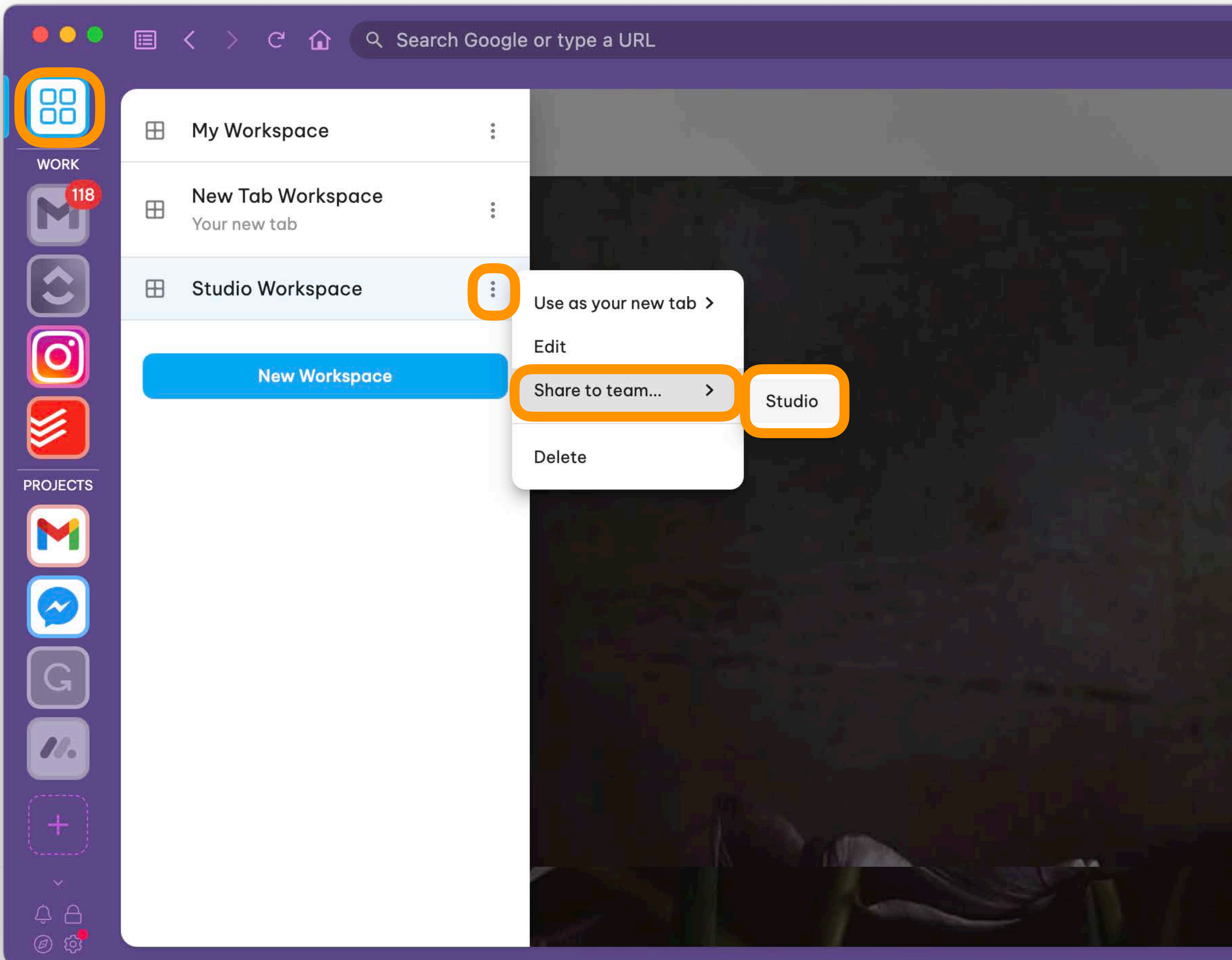
- Click on **Manage** in both sections to edit your business and team names.
- Click on **Billing** to access your team invoices and manage consolidated billing
- Click on **Templates** to see any templates you have shared with the team.
- Click on Workspaces to see any workspaces you have shared with the team.

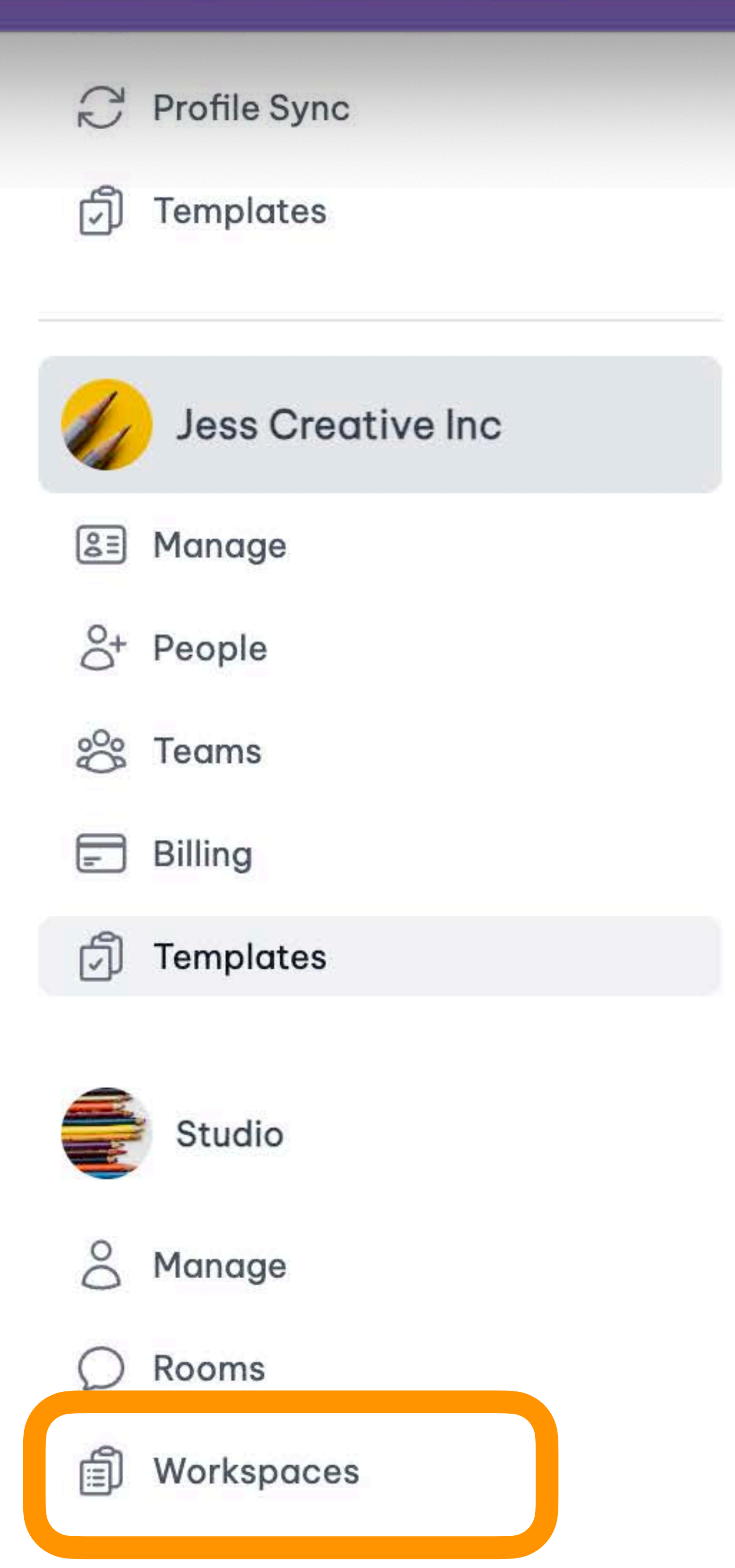
STEP 3 Add an Install Template



- Click on **Templates** in the My Wavebox admin section to see a list of all your templates.
- To make a template available to teams, **check the box** in the TEAMS column.
- Those templates listed on the **Templates** page in your business admin section.

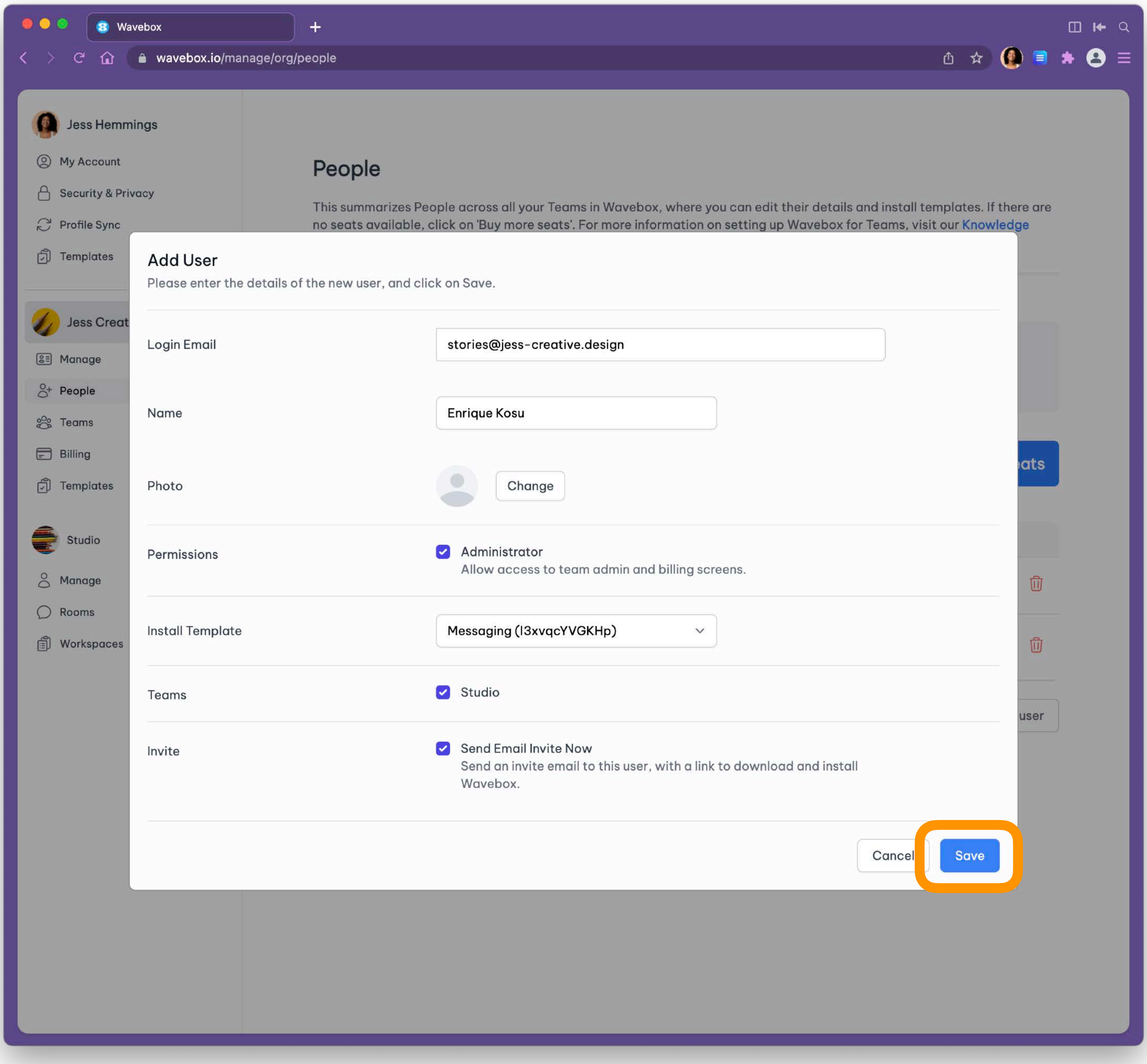
STEP 4 Add a Workspace





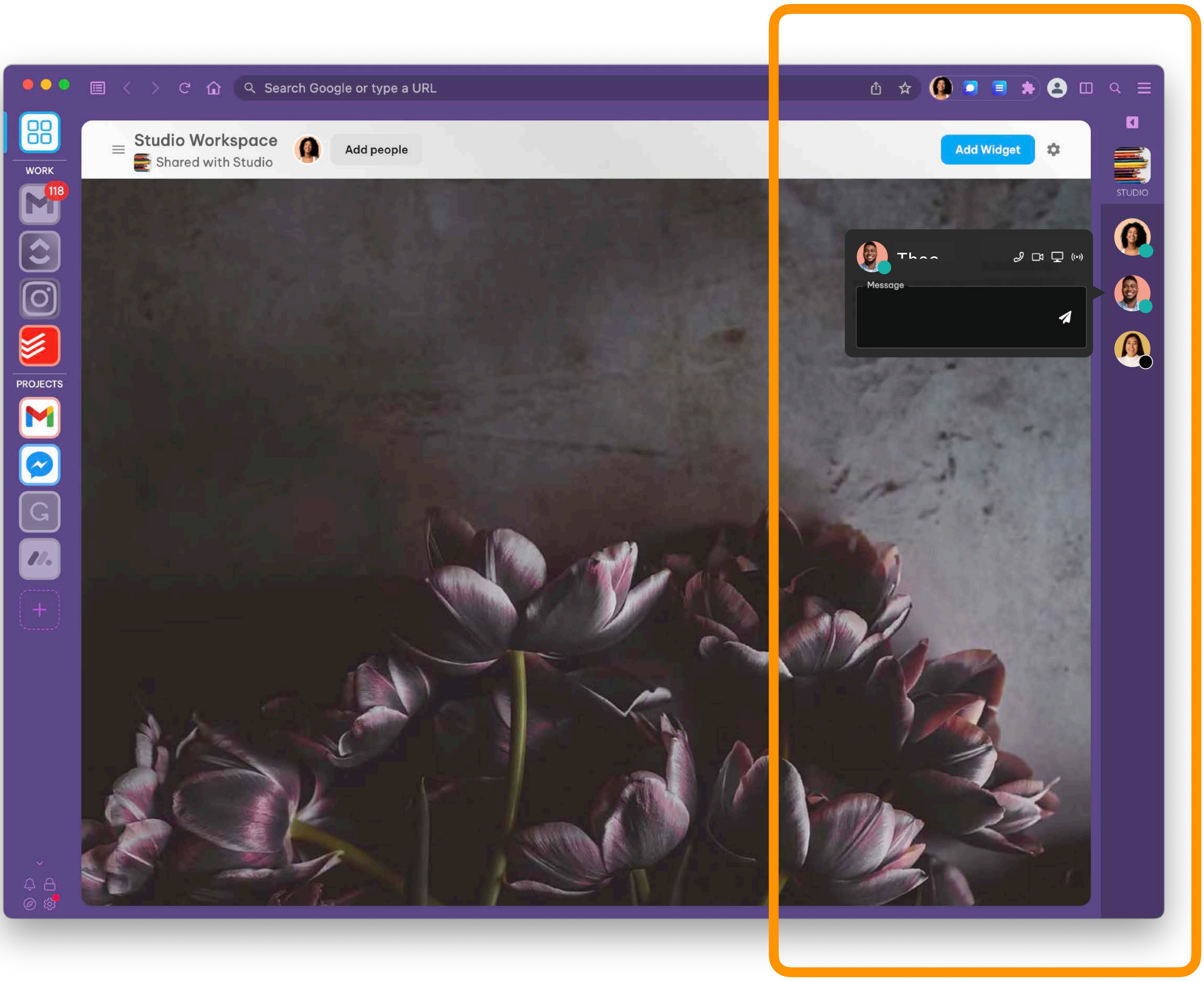
- Click on the **Workspaces** Icon (top-left) followed by the **Burger Menu**
- Highlight the workspace you want to share and click on the **Kebab Menu**, followed by **Share** and the **team name**.
- Team workspaces are listed on the **Workspaces** page in your team admin section.

STEP 5 Add Users and Send Invites



- Click on **People** in the business admin section and then click on **Add User.**
- Enter the **email** they will use to login. Note that the invite will go to this address.
- Check the box to enable **team admin** permissions.
- Choose an install **template** from the dropdown list. If no template is selected, Wavebox will install with a blank setup.
- Check the box to enrol them in a **team** they will be part of.
- Check the box to send an **email invite** immediately after clicking on **Save**.

STEP 6 Start Using Connect



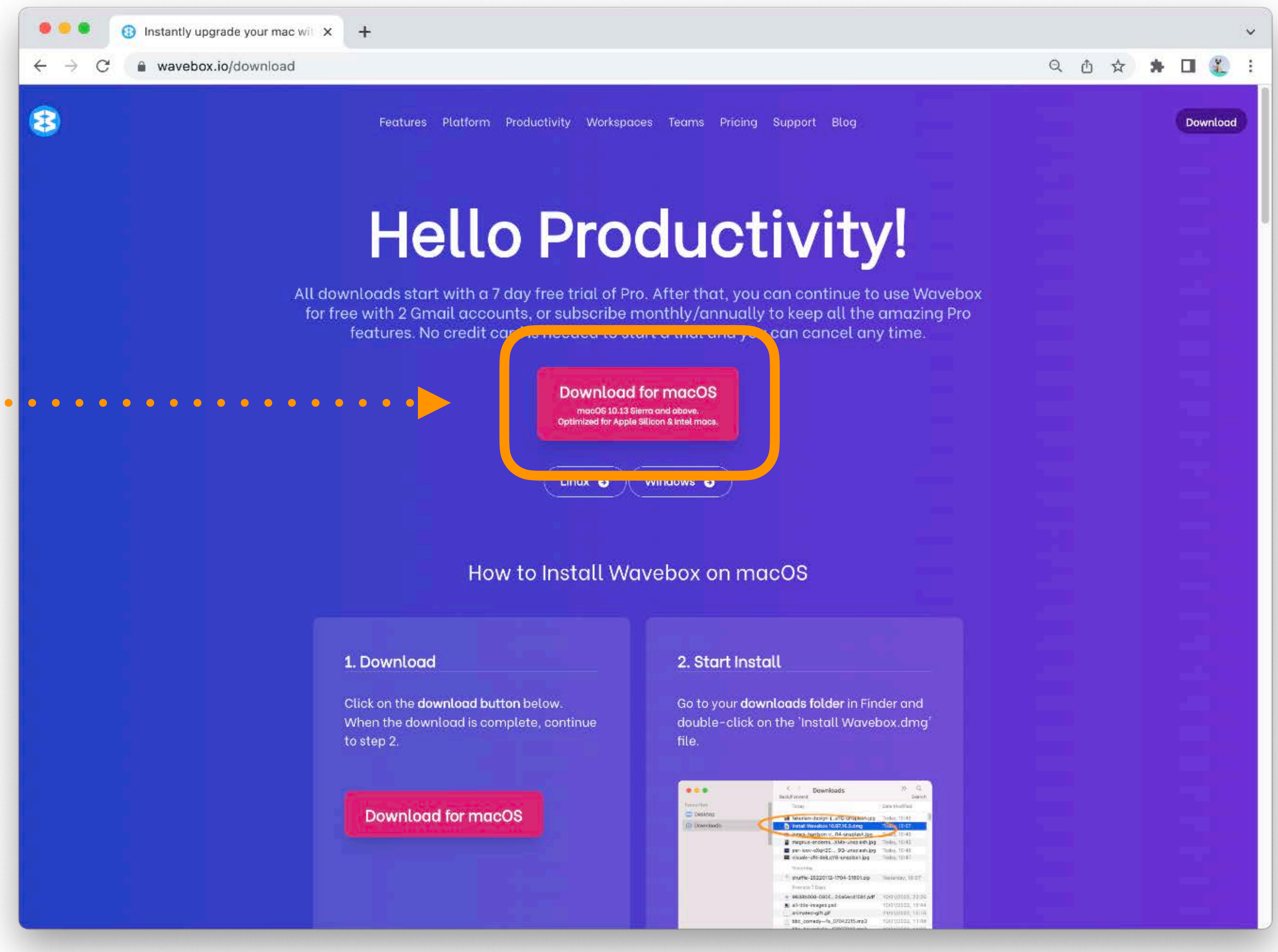
- After creating your first team the **Connect extension icon** (blue square with a white speech bubble) will appear in the top toolbar.
- The **Connect microbar** will also appear on the right-hand side of the main window.
- You can enable and disable Connect by going to **Settings > General > Connect > Enable** (toggle on/off)
- **Hover over an avatar** to send an instant DM, begin a voice/video call or start a screenshare.
- If the recipient is online they can reply and answer the call via the Connect sidebar.
- The Connect extension icon will display a red badge to indicate something new.
- Connect notifications are also also shown in the Wavebox Mini, and you can add a Connect activity widget to any workspace.

User Install

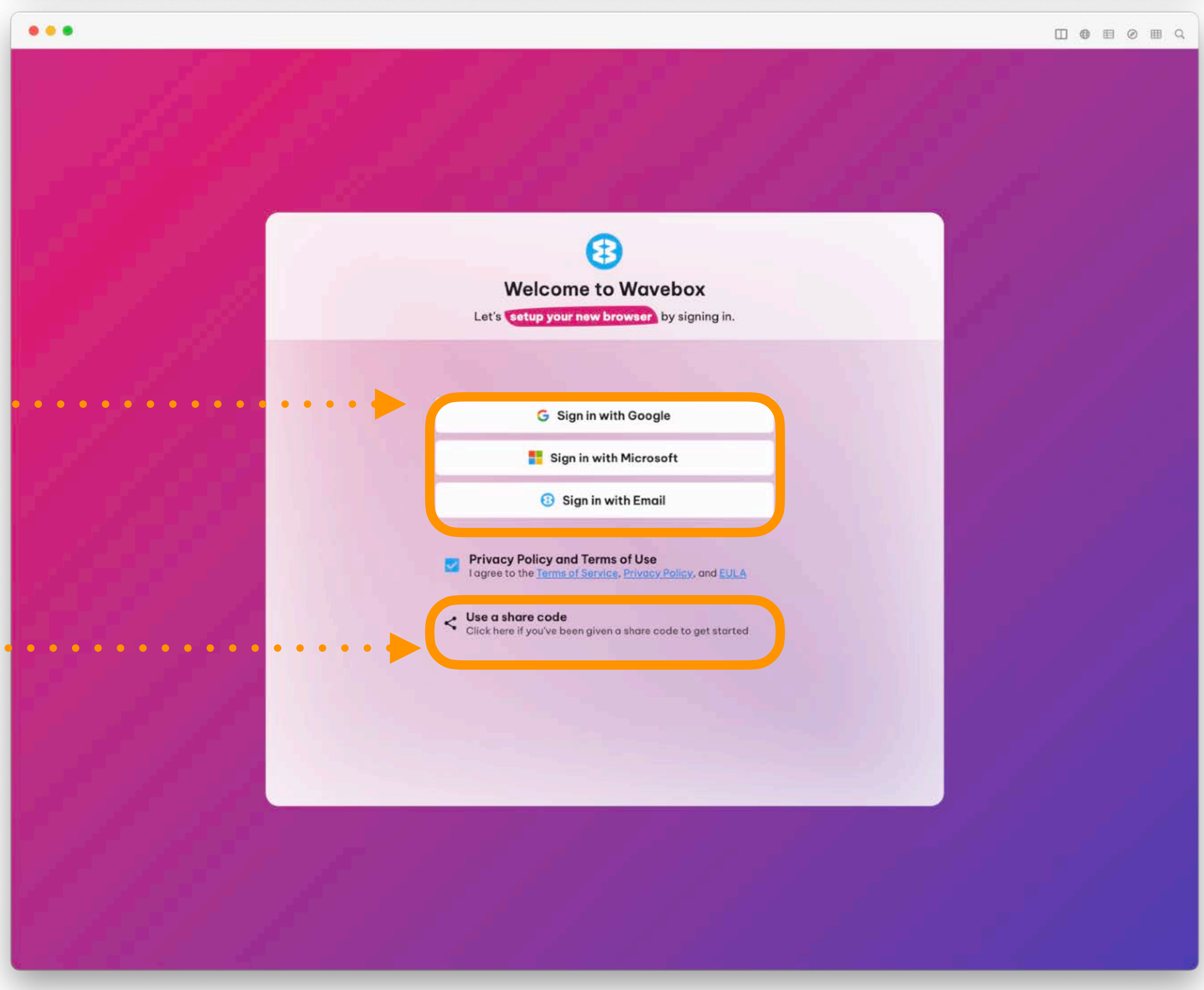
User Install

Email invite

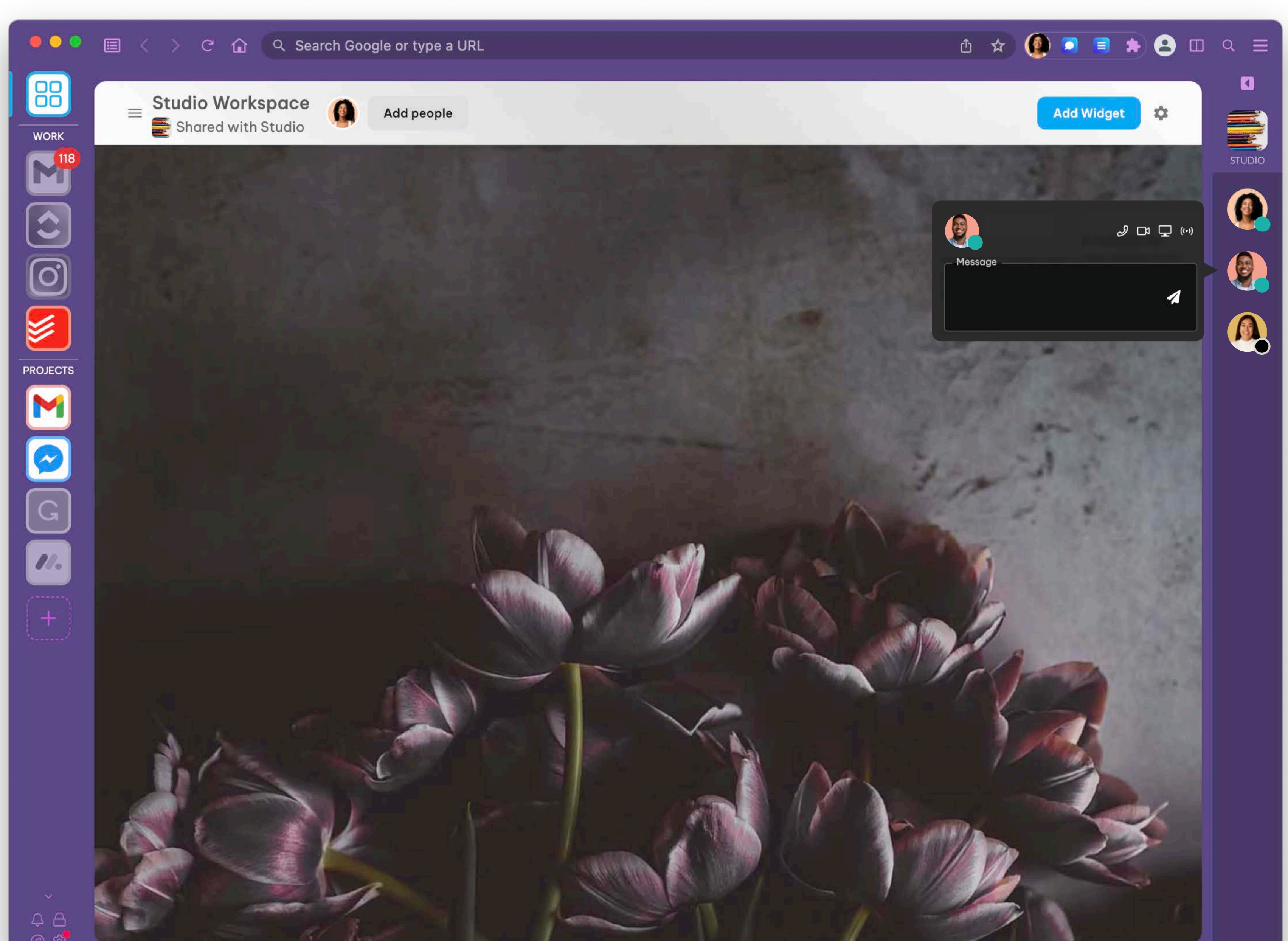
wavebox.io/download



- The user receives an email containing a **unique link** to download Wavebox.



- After clicking the link and downloading Wavebox, the user **must login using the same email address** that the invite was sent to.
- If you don't want to use the automated email invite, you can give them the **template code** to paste in manually instead.



- Wavebox will **recognise** the user as a part of your team and install the correct template.
- In the Team Admin Portal the user will be shown as **Enrolled**.

Team UI Guide

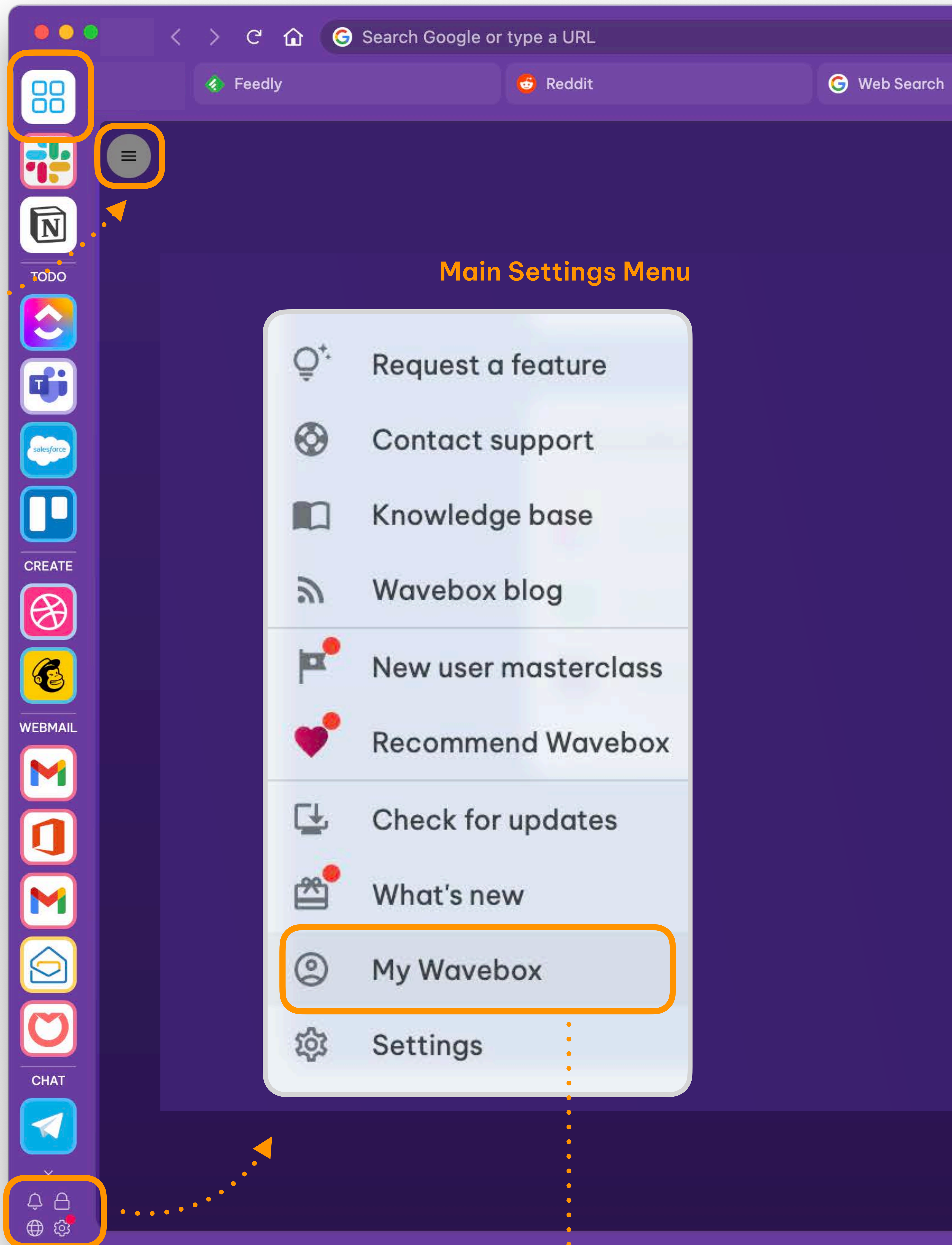
Workspaces, Settings and My Wavebox

Workspaces Webdock Icon

Focus workspaces in the main window

Workspaces Menu Icon

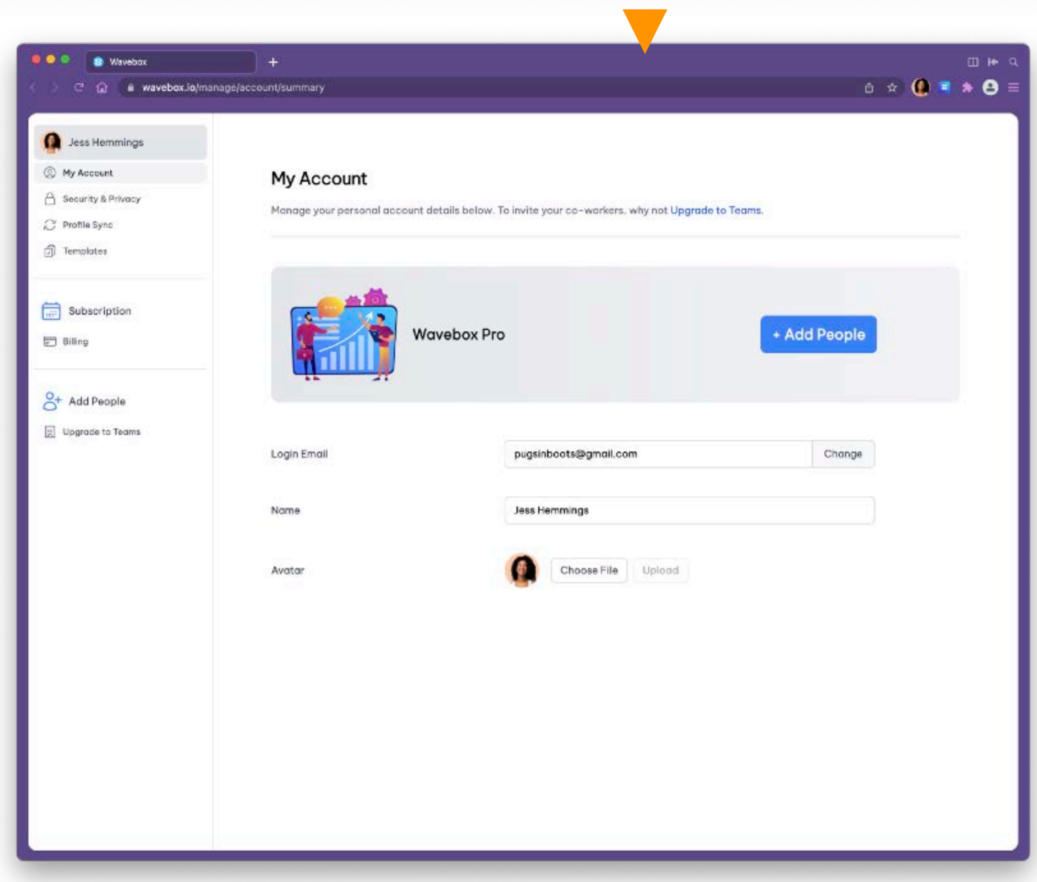
Manage & share workspaces



Settings Icon

Click on My Wavebox to launch the Admin Portal

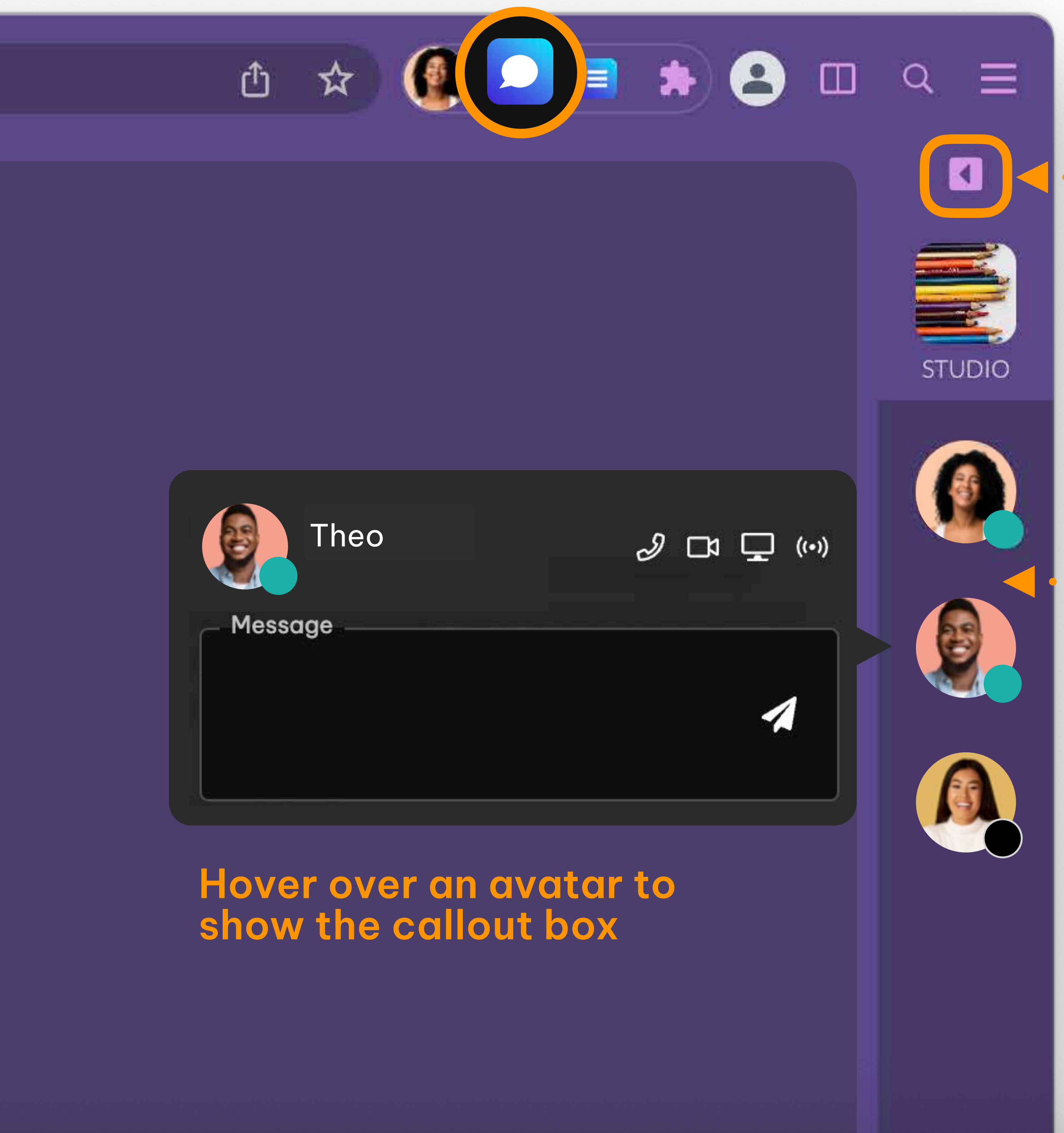
Admin Portal



Connect, Profiles and My Wavebox

Connect Icon

Hide/show the Connect sidebar



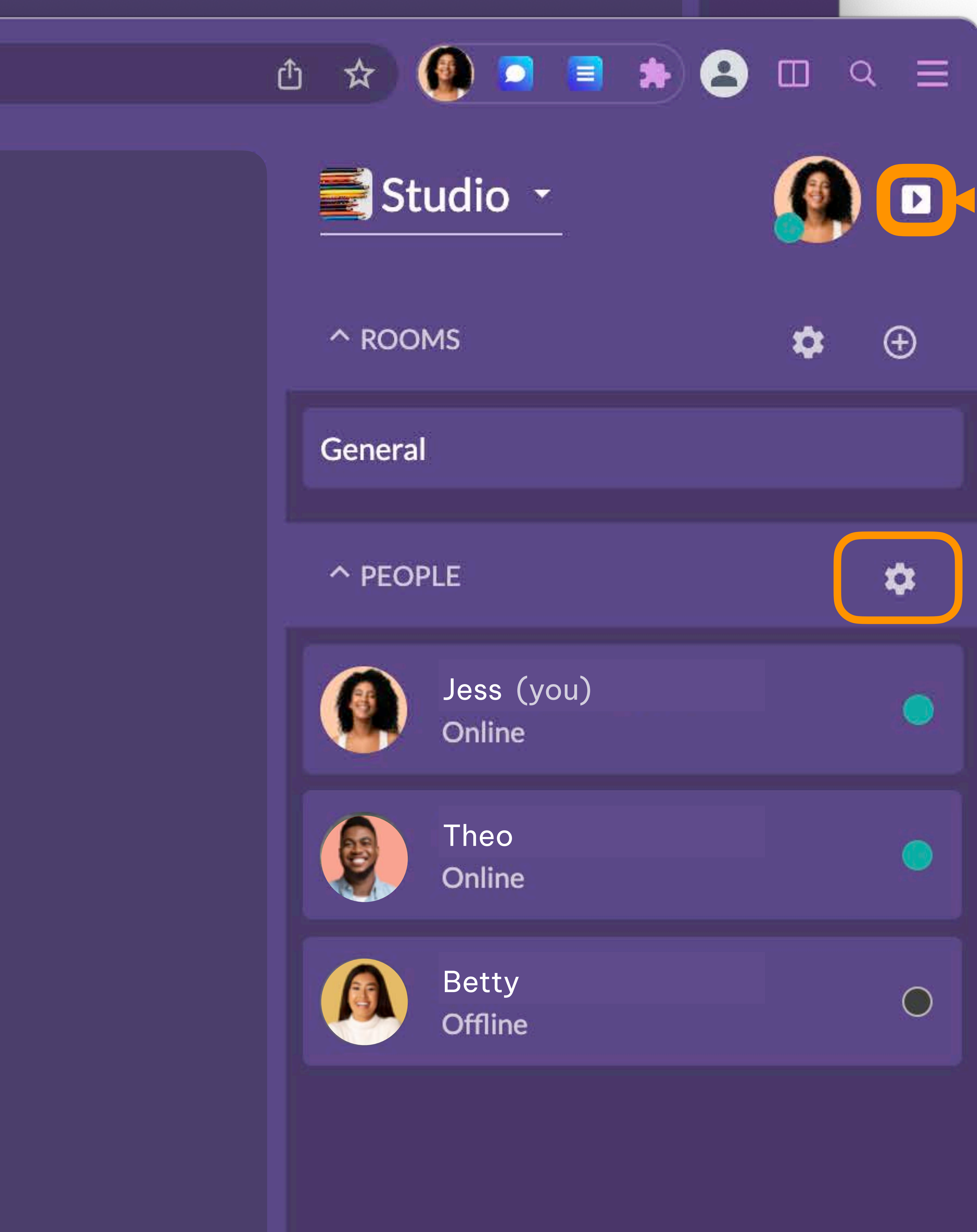
Connect Sidebar Toggle

Switch between hide/micro/full

Team Avatars

Click to send a DM or start a voice/ video call or screen share

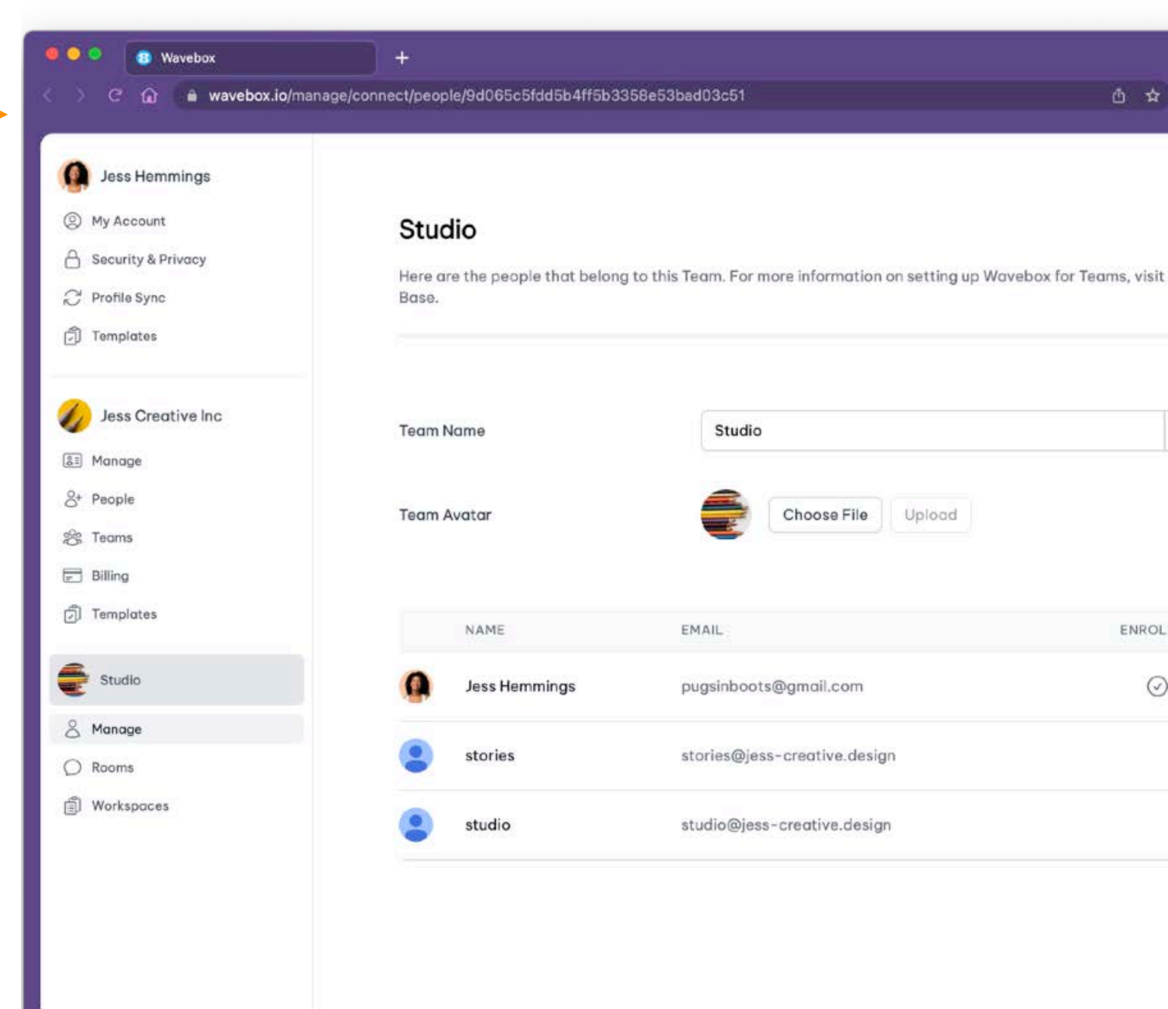
Hover over an avatar to show the callout box



Connect Sidebar Toggle

Switch between hide/micro/full

Admin Portal: Manage Team



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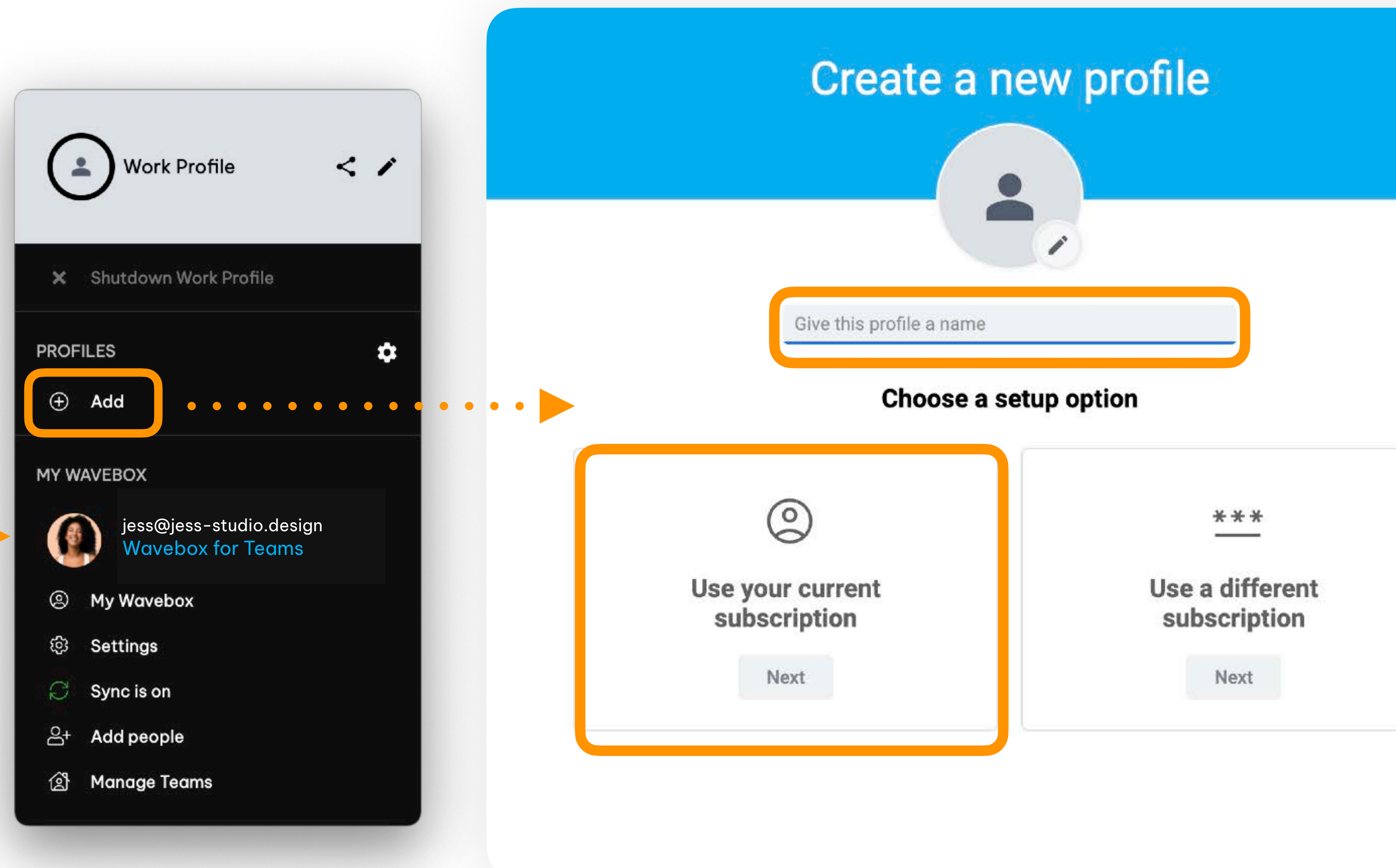
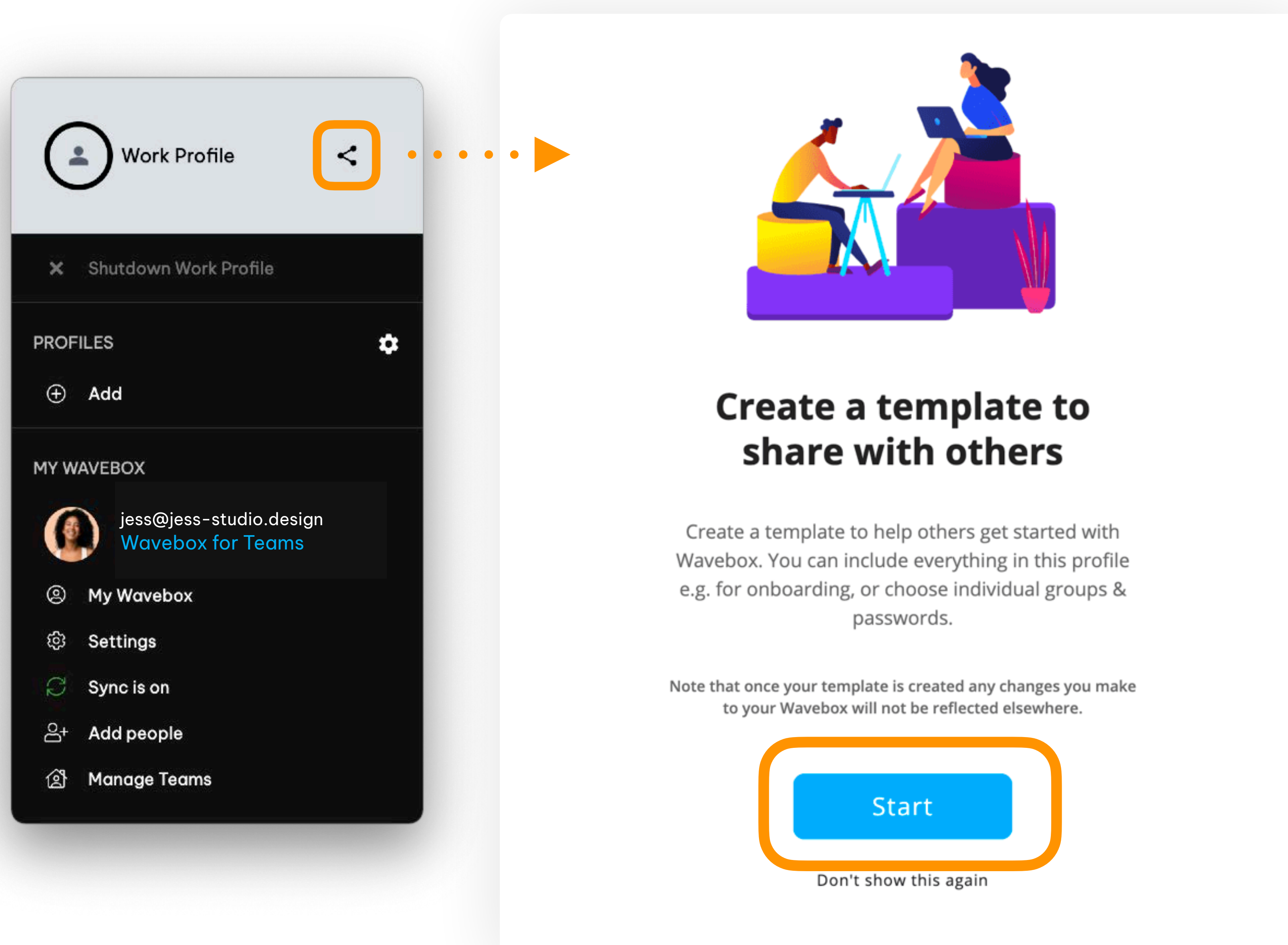
Other Guides

Create and Share a Template

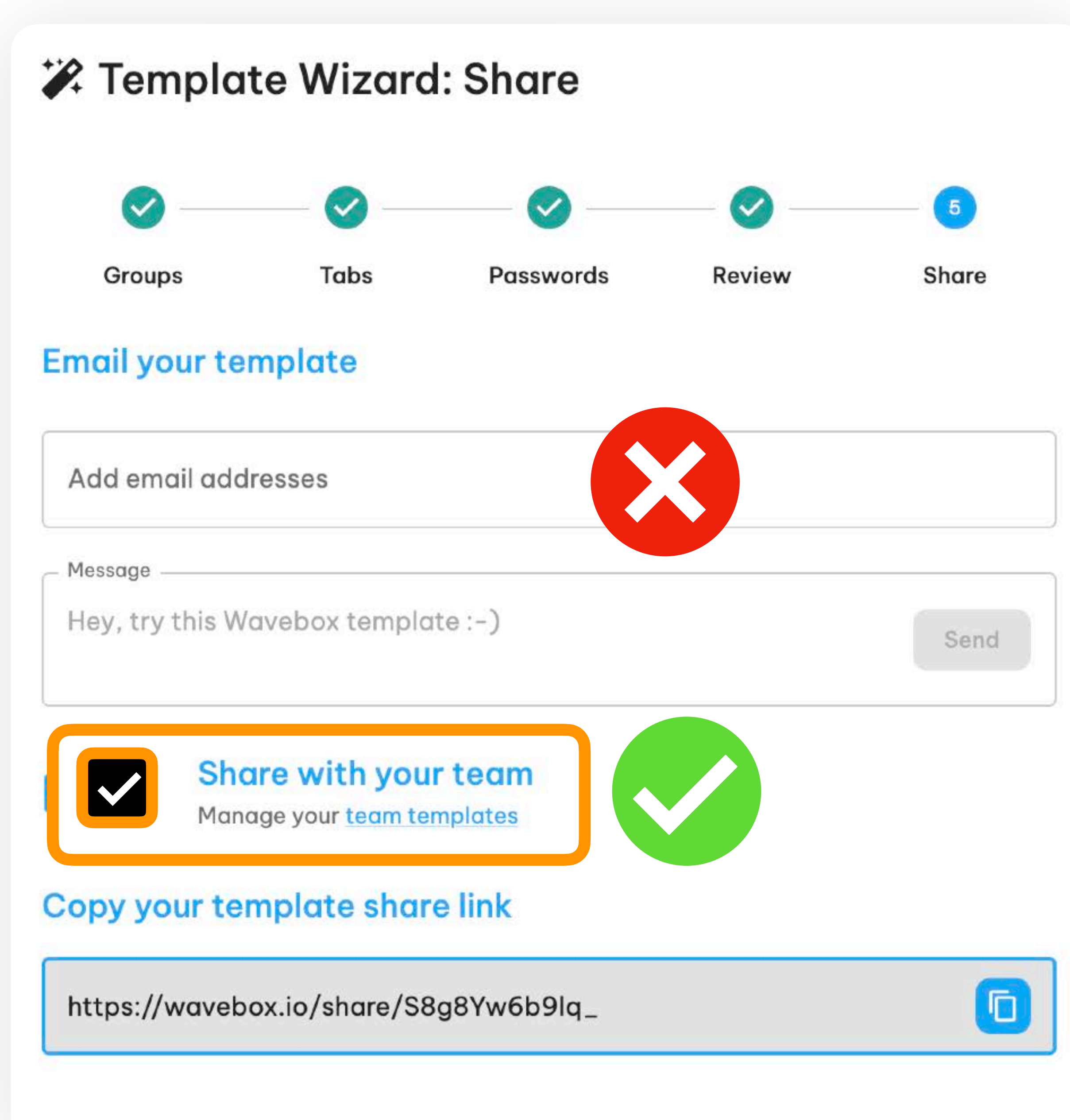
- In your Wavebox, click on the **Profile** icon (top-right) followed by **Add** to launch the Profile Manager.
- Enter a name for your template e.g. Sales, then click on the **Next** button under **Use your Current Subscription.**



- A new, blank Wavebox profile will launch, ready for you to start adding groups, apps and tabs.
- When you've finished, click on the **Profile** icon followed by the **Share** icon to launch the **Template Wizard**.



- Follow the steps. If you choose to include passwords you will need to create a **master password** for the recipient to enter when installing the template.
- In the last step, check the box next to **Share with your team** to add the template to your **Admin Portal > Templates**.



Knowledge Base Article

https://wavebox.io/kb/how-do-i-create-a-group-profile-template-to-share/