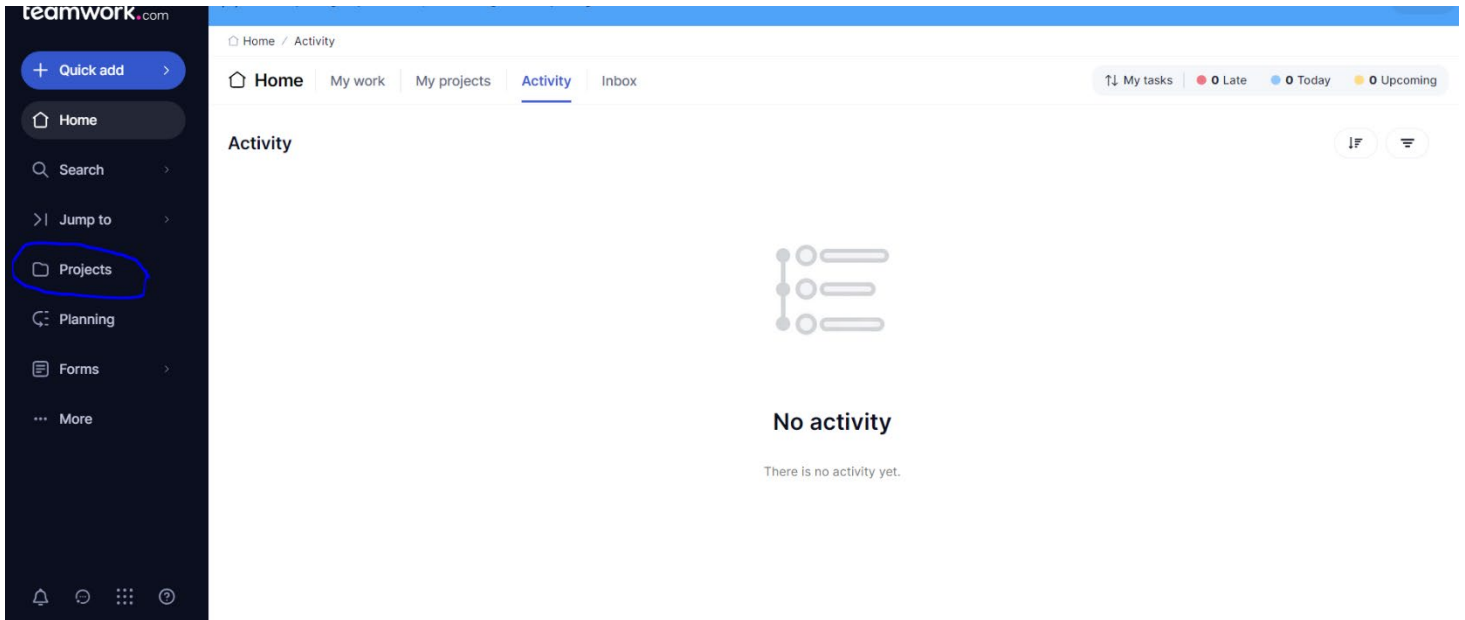


How to Navigate Teamwork

Desktop Version

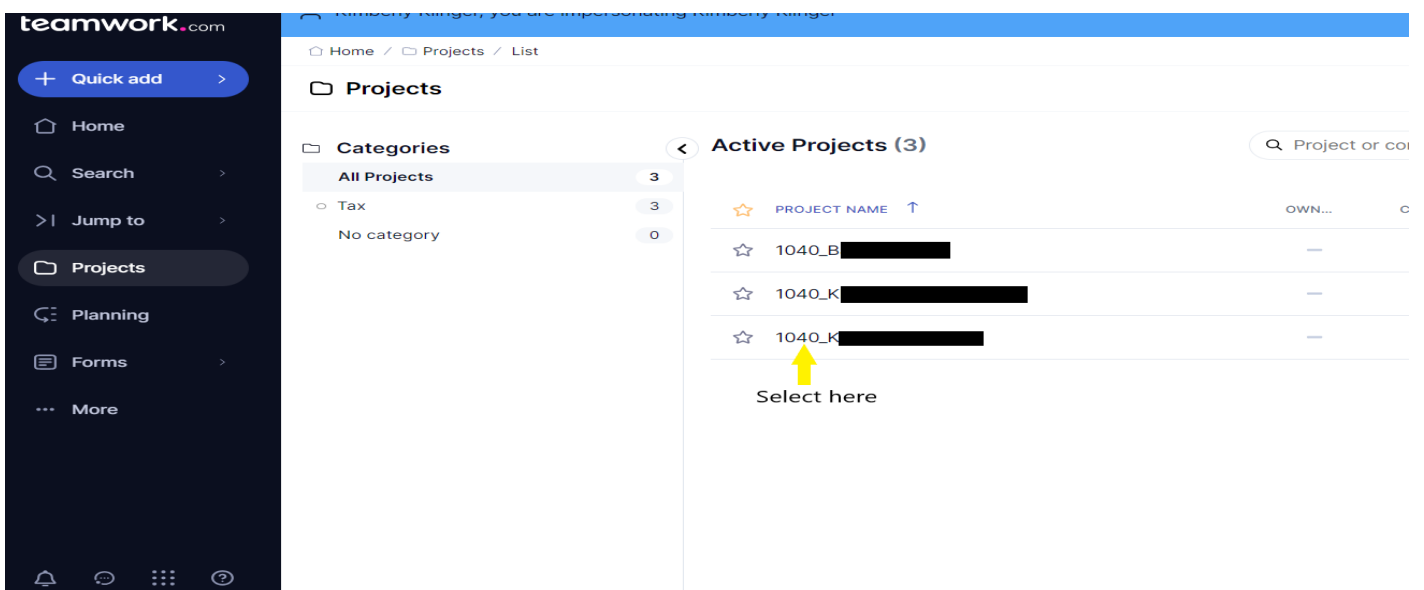
Uploading Documents:

Step 1: On the left-hand side, in the black column select projects.

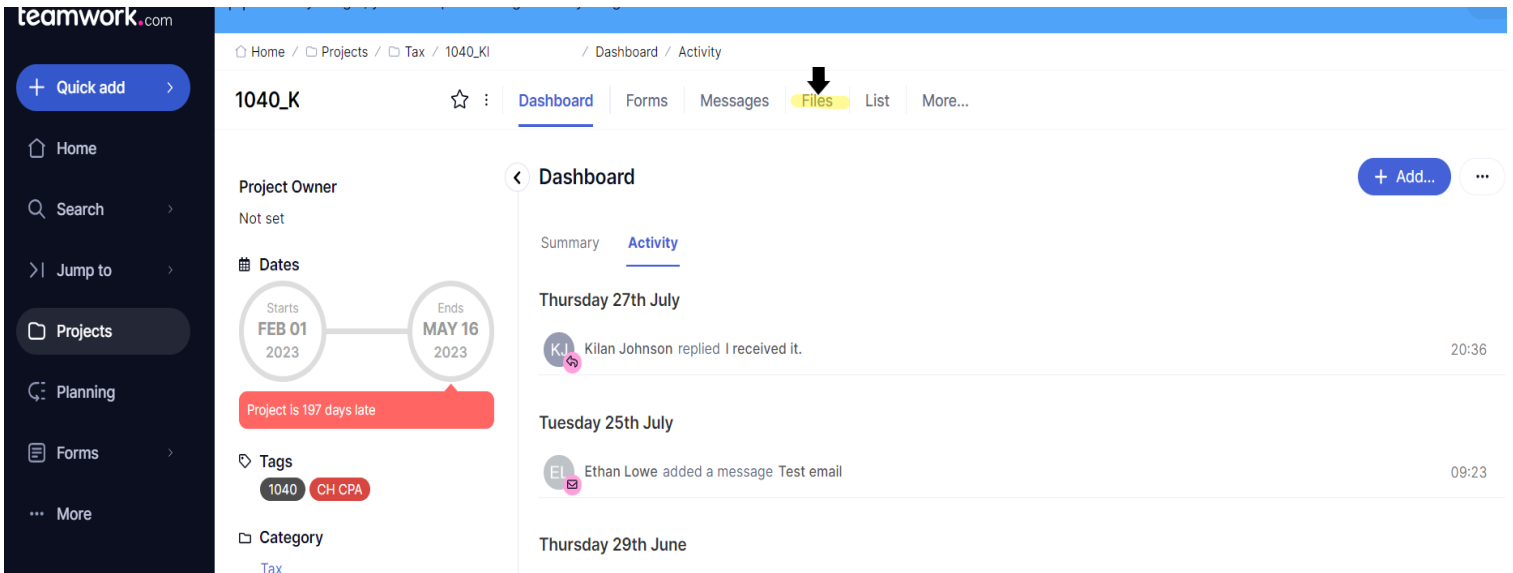


***Please note: If this way doesn't work click the home tab, then my projects tab at the top of the screen in gray. ***

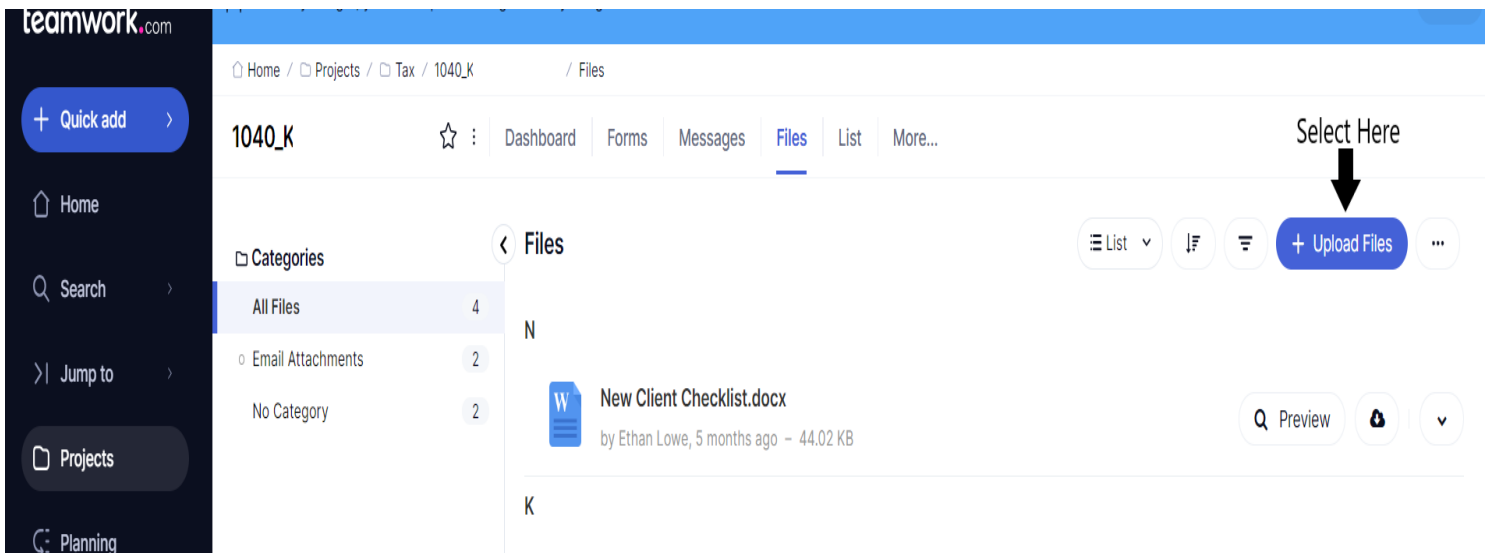
Step 2: You should see all the projects you are connected to. To enter the project, select the project name.



Step 3: At the top of the page, you will see gray tabs, select files.

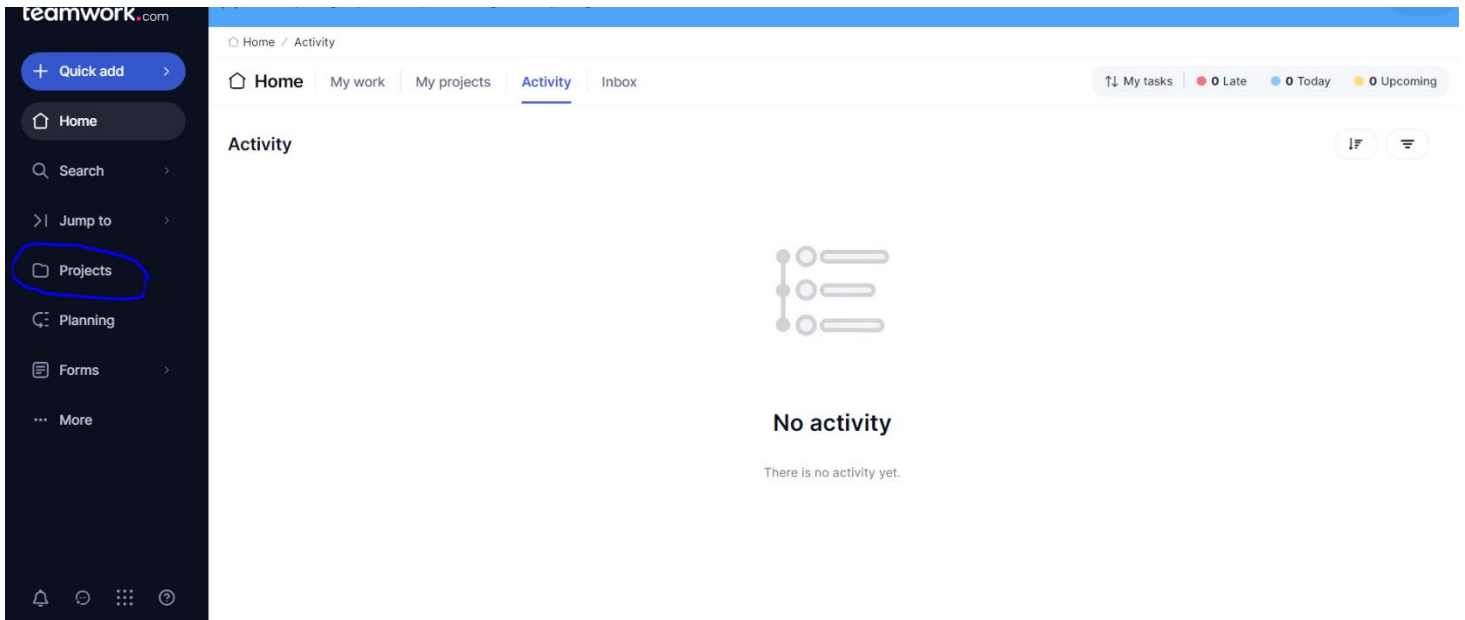


Step 4: Select the blue upload files button and add your personal files.

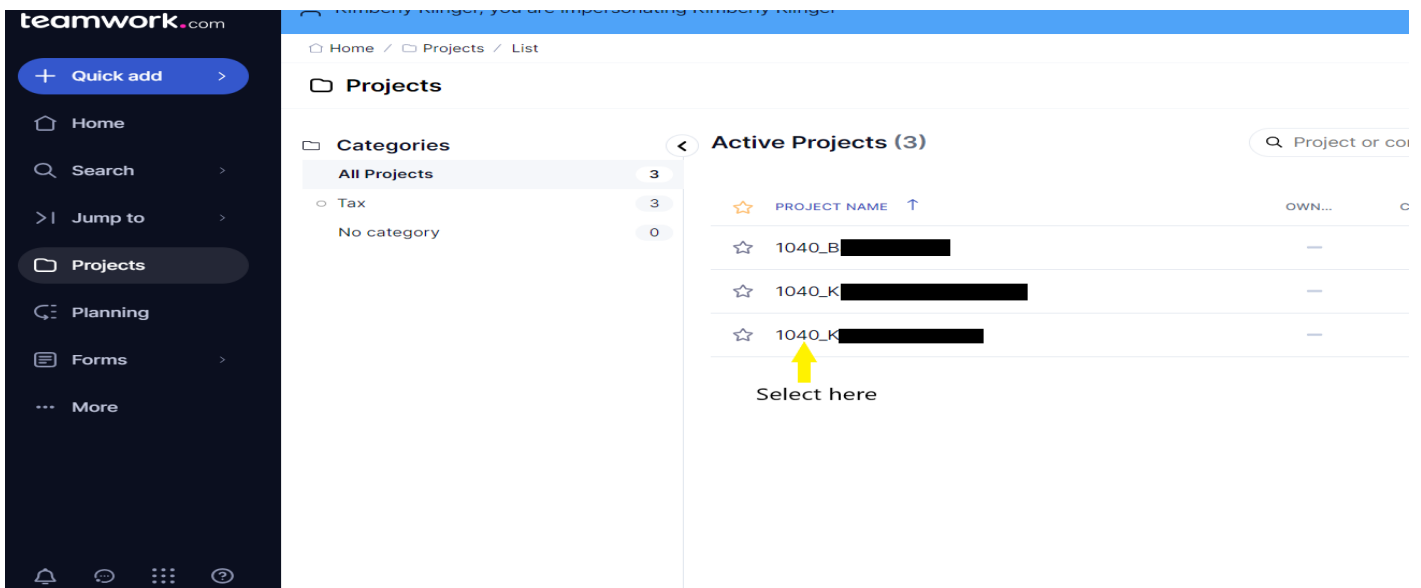


Adding Messages/Questions

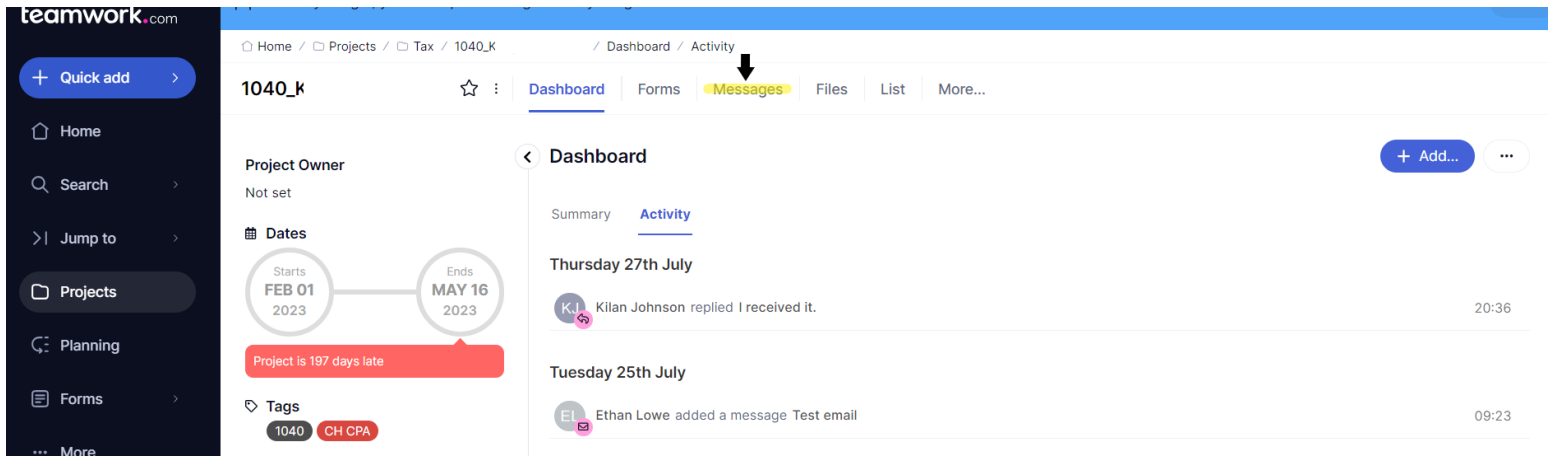
Step 1: On the left-hand side, in the black column select projects.



Step 2: You should see all the projects you are connected to. To enter the project, select the project name.

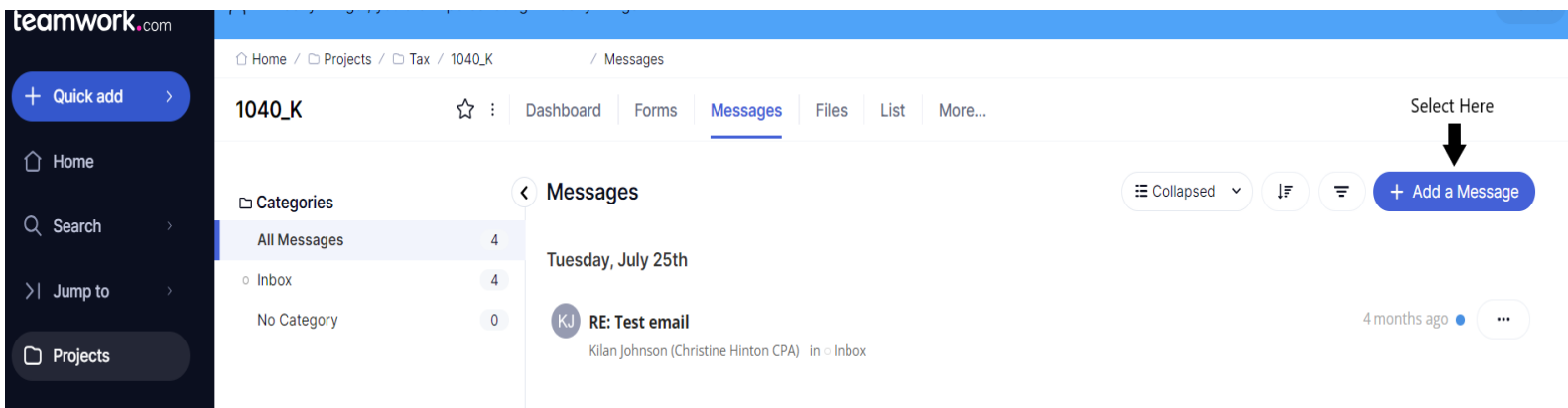


Step 3: At the top of the page, you will see gray tabs, select messages.



The screenshot shows the Teamwork.com interface for project 1040_K. The top navigation bar includes tabs for Dashboard, Forms, Messages, Files, List, and More... The 'Messages' tab is highlighted in yellow, and a black arrow points to it. The main content area displays a 'Dashboard' view with a 'Summary' and 'Activity' section. The activity log shows a message from Kilan Johnson on Thursday 27th July and a message from Ethan Lowe on Tuesday 25th July. A blue '+ Add...' button is visible in the top right corner of the activity section.

Step 4: Click the blue add message button.

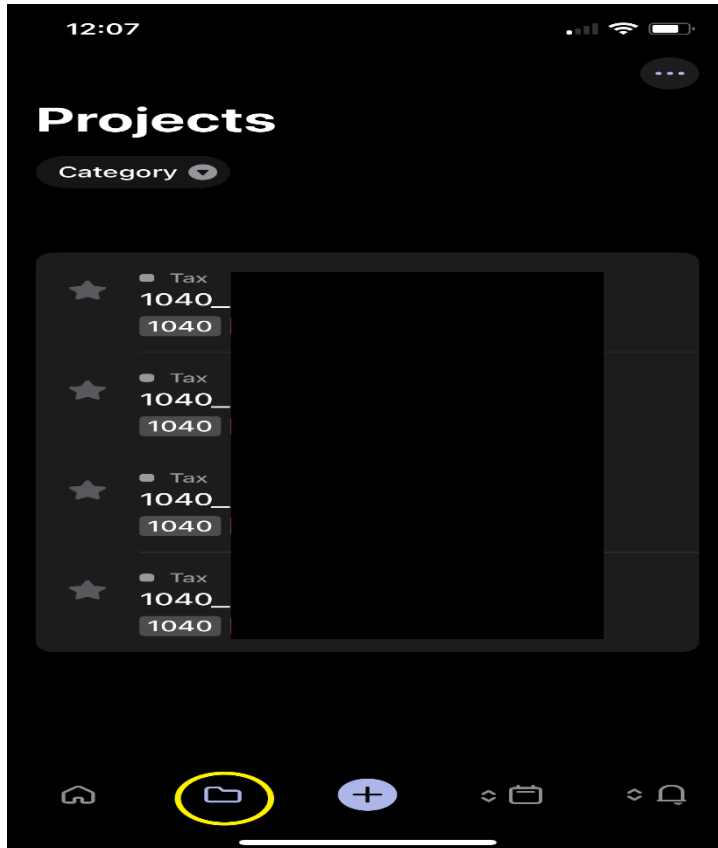


The screenshot shows the Teamwork.com interface for project 1040_K, now in the 'Messages' view. The top navigation bar includes tabs for Dashboard, Forms, Messages, Files, List, and More... The 'Messages' tab is highlighted in blue. The main content area displays a 'Messages' view with a 'Categories' sidebar on the left and a message list on the right. The message list shows a message from Kilan Johnson (Christine Hinton CPA) on Tuesday, July 25th. A blue '+ Add a Message' button is highlighted in the top right corner, with a black arrow pointing to it and the text 'Select Here' above it.

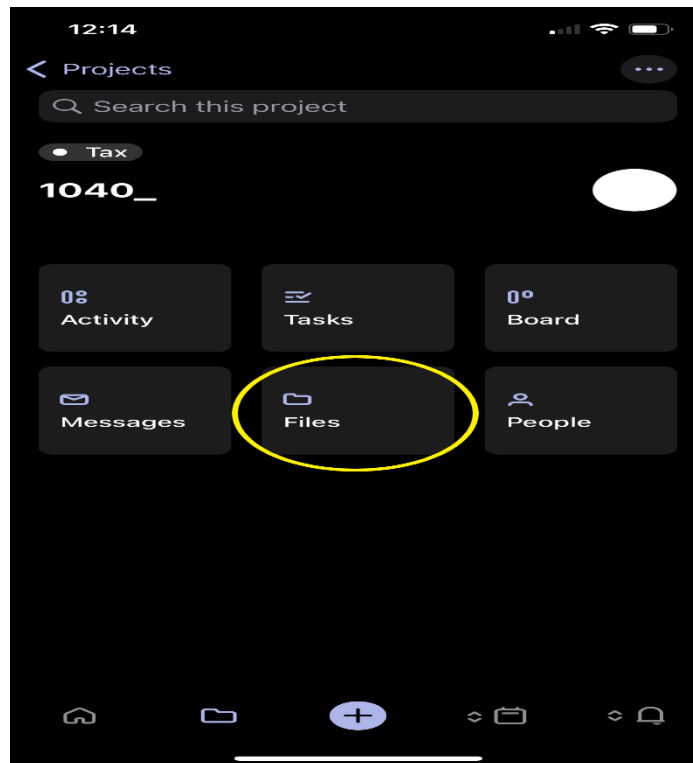
App Version

Uploading Documents:

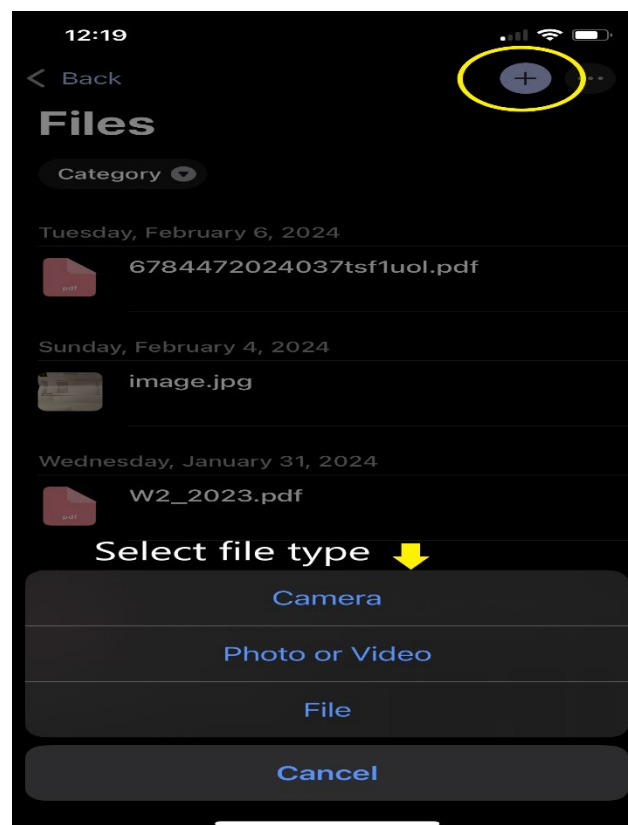
Step 1: Click the file icon at the bottom of the screen and it will show you all of the projects you have access to.



Step 2: Once you have selected the project you want to upload files to, select the files button.

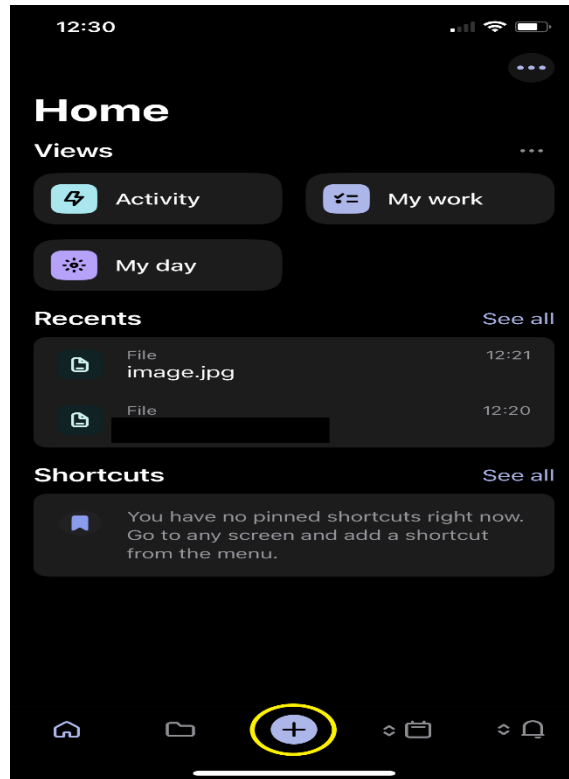


Step 3: Click the plus sign at the top right corner and then select an option. If you choose to take a picture you will have to select use photo before it is uploaded.



Adding Messages:

Step 1: Click the plus sign at the bottom of the screen, and it will open the message screen.



Step 2: If you have multiple projects select the drop-down arrow and pick which project you want the message to go into. Once you click save the message will be sent.

Note *If you want to tag someone specific, please click the person at the bottom OR if you want to add a file with the message click the paperclip*

