



# Welcome to the Teambox Quick Start

VERSION 1.1.5

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## Thank you for installing Teambox.

This document will introduce you to the concept of a Teambox and help you get started creating your own. You'll then be able to start working with your different partners with different tools from a single application.

You can skip ahead to any section you like by clicking on the corresponding title.

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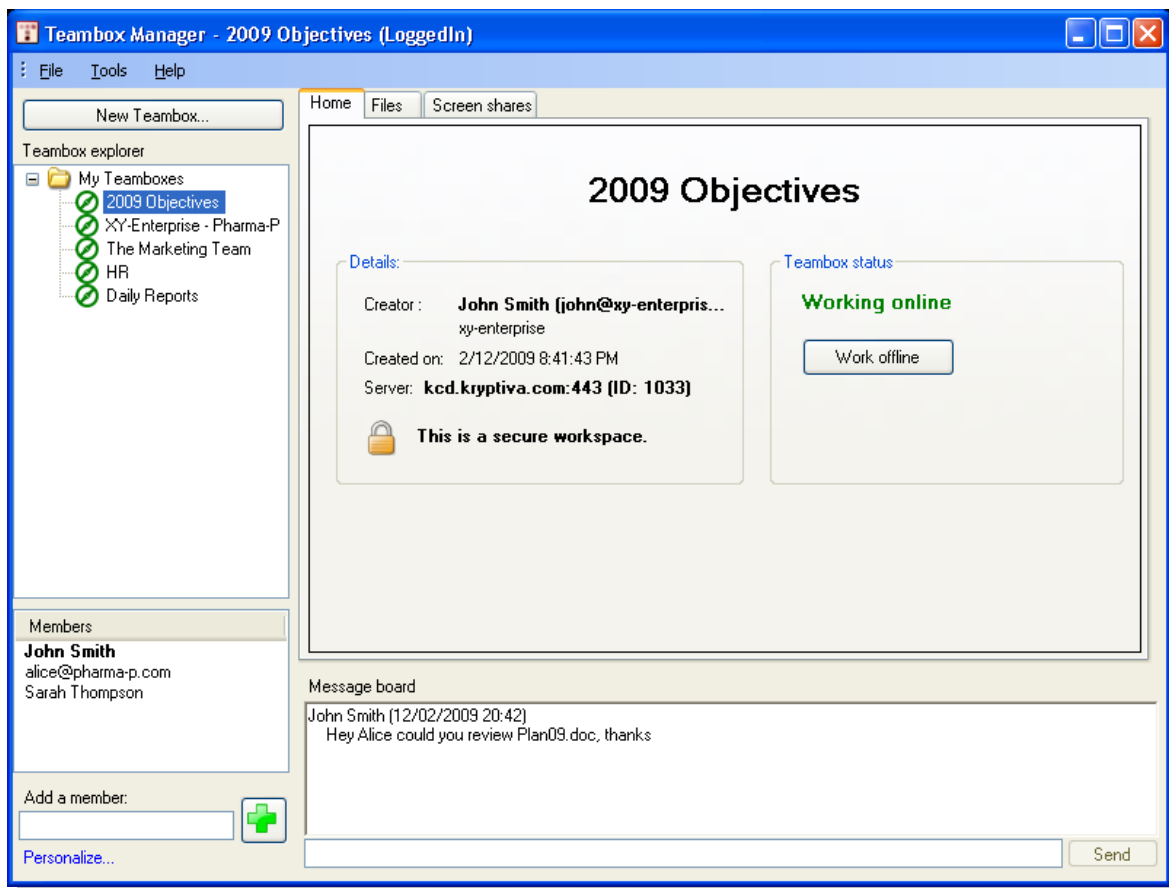
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# 1. What's a Teambox?

A Teambox is a workspace where you can share information securely with your clients and partners in a variety of ways:

- **Sharing Files**
- **Sharing your screen**
- **Instant Messaging**

So by creating a Teambox you can get everyone on the same page and have the proper tools to get your work done.



*The Teambox Manager*

## 2. How do I create a Teambox?

Creating a Teambox is quite simple. In the Teambox manager just click on the “**New Teambox...**” button on the top left corner of the application. A pop-up will appear to guide you through the necessary steps:

New Teambox...

1. Enter the **name** of your new Teambox
2. Select what **type** of Teambox you'd like to create and click “Next”
  - a. **Standard Teamboxes** require the recipient(s) to have the email invitation to access it.
  - b. **Secure Teamboxes** work the same way but also require the recipient(s) to enter a password set by you. If selected, you'll be prompted to enter the password(s) for each recipient at the end of the process.
3. Enter the **email address(es)** of the person(s) you wish to invite to the Teambox and click “Next”.

The screenshot shows the 'Teambox creation' dialog box with the title bar 'Teambox creation'. The main heading is 'Tell us a bit more about your new Teambox.' Below this, there is a text input field for 'Name of your new Teambox:' with the value 'My New Teambox' entered. A red number '1.' is placed to the left of this field. Below the name field, there is a section for 'Type of Teambox:' with two radio button options. The first option is 'Standard (default)' with a selected radio button and a red number '2.' to its left. The second option is 'Secure' with an unselected radio button. Below these options, there is a brief description for each type. At the bottom of the dialog, there are three buttons: '< Back', 'Next >', and 'Cancel'.

The screenshot shows the 'Teambox creation' dialog box with the title bar 'Teambox creation'. The main heading is 'You can invite people to your new Teambox right away.' Below this, there is a section titled 'Invite people to My New Teambox'. Underneath, there is a text input field for 'Enter some email addresses:' with the value 'alice@pharma-p.com, sarah@finance-p.com' entered. A red number '3.' is placed to the left of this field. Below the email field, there is a link that says 'Use commas to separate emails: joe@pharma-p.com, jane@pharma-p.com' and another link that says 'Add a personal message...'. At the bottom of the dialog, there are three buttons: '< Back', 'Next >', and 'Cancel'.

### Creating A Teambox

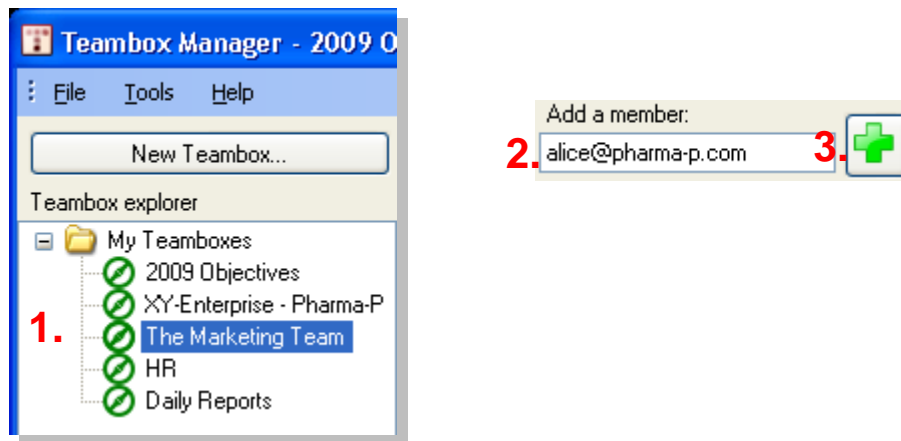
Your recipient(s) will receive an email that will enable them to join you in your Teambox so you can start working together. For details on how to access a Teambox [click here](#).

You can also create Teamboxes using Outlook, refer to the “User Guide” to see how.

### 3. How do I invite people to an existing Teambox?

Once you've created a Teambox inviting others to work and share information with is simple:

1. Select the **Teambox** you wish to invite someone to
2. Enter their **email address** in the field at the bottom left side of the Teambox Manager
3. Click on the “+” button



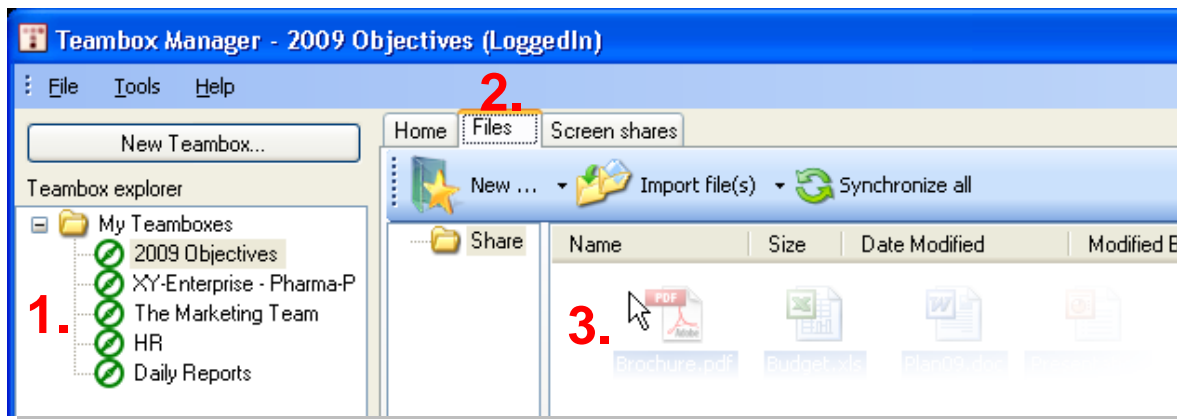
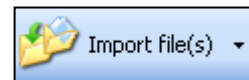
*Inviting Someone To A Teambox*

You can also add people to a Teambox using Outlook, refer to the “User Guide” to see how.

## 4. How do I share files using Teambox?

One of Teambox's main goals is to simplify file sharing across enterprises while keeping everything secure, centralized and in synch. To share files with the other members of the Teambox:

1. Select the **Teambox** you wish to share files in
2. Select the **"Files"** tab
3. Add the files you wish to share by:
  - a. **Drag and dropping** the files or folders
  - b. Click the **"Import file(s)"** and browsing to the desired files or folders.



### *Sharing Files*

The other members of the Teambox will now be able to view the files you've added, modify them and share those changes with you.

If you want to modify a file just double click on it. Keep in mind you'll need to synch the file to the Teambox using the "Synchronize all" button for everyone to see your changes.

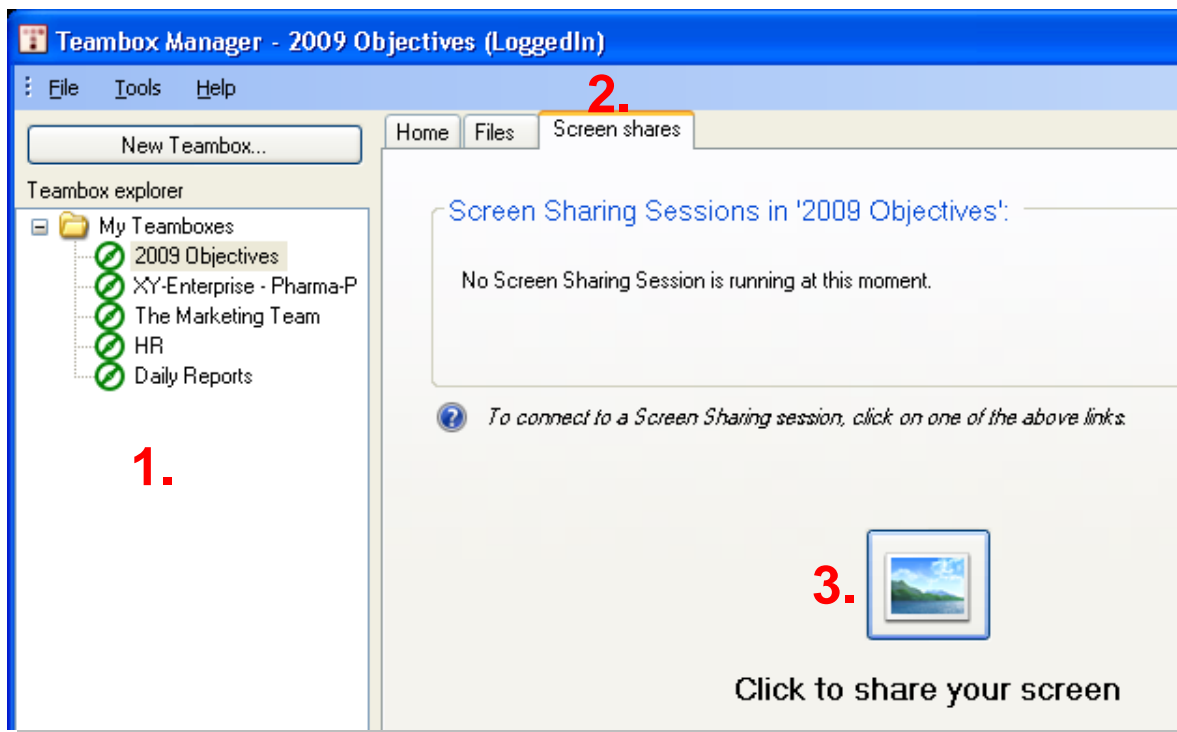
For more information on how Teambox Synchronization works refer to the "User Guide".

## 5. How do I share my screen?

A Teambox allows you to share your screen with the other members of that workspace. Doing presentation to customers or working in real-time on a document with someone else is made very simple.

To share your screen with other team members:

1. Select the **Teambox** with the team members you want to share your screen with
2. Select the “**Screen shares**” tab
3. Click on the “**share your screen**” button



### Sharing Your Screen

The **wizard** will guide you through the steps necessary to share your screen:

- I. Choose if you want to share your **entire screen** or just **one application**
- II. Choose if you want to **share control** of your PC with your team members
- III. Enter a **title** for your Screen Sharing Session

Once your session is initiated, your team members will be able to join it and see your screen.

## 6. How do I join a Teambox?

There are two ways to join a Teambox, for detailed instructions click on the method you prefer:

- Using [Outlook 2003/ 2007](#) with a Teambox Connector
- Any [other email client/ service](#) that doesn't have a Teambox Connector

### 6.1 Outlook 2003/ 2007 With A Teambox Connector

With the Outlook Connector joining a Teambox is a breeze:

1. In Outlook, **open** the **email** containing the invitation
2. The Teambox toolbar will change color to orange, click on the **"Join Now!"** button



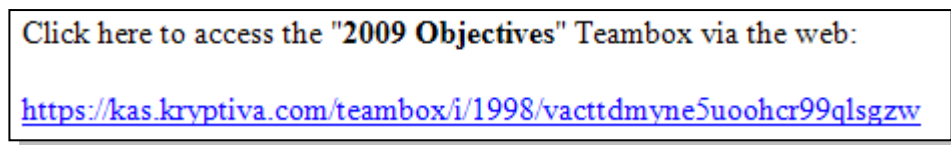
*Joining a Teambox with Outlook*

The Teambox Manager will automatically pop-up and display the new Teambox.

### 6.2 Other Email Clients/ Service

If you've received a Teambox invitation and you don't have access to a Connector:

1. Click on the **URL** at the bottom of the invitation email



2. You'll be taken to the Online Teambox Portal for that Teambox, click on the **"Export Teambox"** button.
3. The browser will prompt you to save a file or open it, this file is what gives your Teambox Manager access to the Teambox. Click on **"Open"**.

Export Teambox

The Teambox Manager will automatically pop-up and display the new Teambox. If the invitation is for a secure Teambox, you'll need to enter your password first; contact the sender if they haven't told you what it is.

## 7. License

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