Wrike Work Hacks

Tips & Tricks

- Tagging: Organize your tasks by adding a category, move from one Folder to another, or include in multiple locations.
- <u>Template</u>: <u>Duplicate</u> your existing Project with tasks as a template and launch future Projects with a single click.

Folder



- Project Wizard: Create new Projects and Folders using a wizard, enabling you to easily choose settings for them right from the beginning.
- <u>Storage</u>: Use cloud storage integration to keep all your docs in one place and linked to Wrike: Google Drive, Dropbox, OneDrive, or Box.

Communication & Collaboration:

Use <u>@mentions</u> to give your team instant access to a task/Folder/Project and send a direct <u>Inbox</u> notification.

• **External sharing**: Collaborate with external partners and clients by having a separately shared Folder with them.

Visibility



- Sharing: Your entire workspace is not automatically shared with anyone. Give access and visibility to your team by sharing. Create a separate team Folder for public access.
- <u>Following</u>: Follow items to get notified about all changes to a Project or a task that you are not assigned to or invite others to follow.

- **Work On-the-Go**: Install the mobile app for <u>Android</u> or <u>iOS</u> and create tasks wherever you are, even offline.
- <u>Track your time</u>: Keep track of time spent on your tasks and create <u>a Report</u> to see overall work done by your team.

Efficiency



- Filtering & Sorting: Use advanced filters to find anything you need across the entire account. You can also save search results as a dynamic widget to your Dashboard.
- Mass Editing: Bulk edit tasks by filtering and selecting them in order to reschedule, reassign, move, include in other Folders, or delete them.

• Consolidate Emails: Send your most important emails as tasks to relevant Folders by using their unique email address to help you organize your work.

Email



• Email notifications: Get notifications that are important to you. Receive your daily to-do's or daily digest at a preferred time.

- <u>Commands</u>: Learn commands to find a particular task matching your requirements.
- <u>Users</u>: Looking for someone particular and their info? Simply type in a name to see that user's card.

Search



- **Attachments**: You can get a list of all tasks that include attachments or look for a specific attachment using search.
- <u>Tasks</u>: Find a task in a specific Folder using the command "folder:" or not included "notin:"

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