

A group of people are working together at a wooden table. One person is using a laptop, another is holding a tablet displaying charts, and a third is holding a pencil. There are two cups of coffee on the table and a small potted plant. The scene is dimly lit, creating a professional and collaborative atmosphere.





Ideagen[™] Huddle[™]

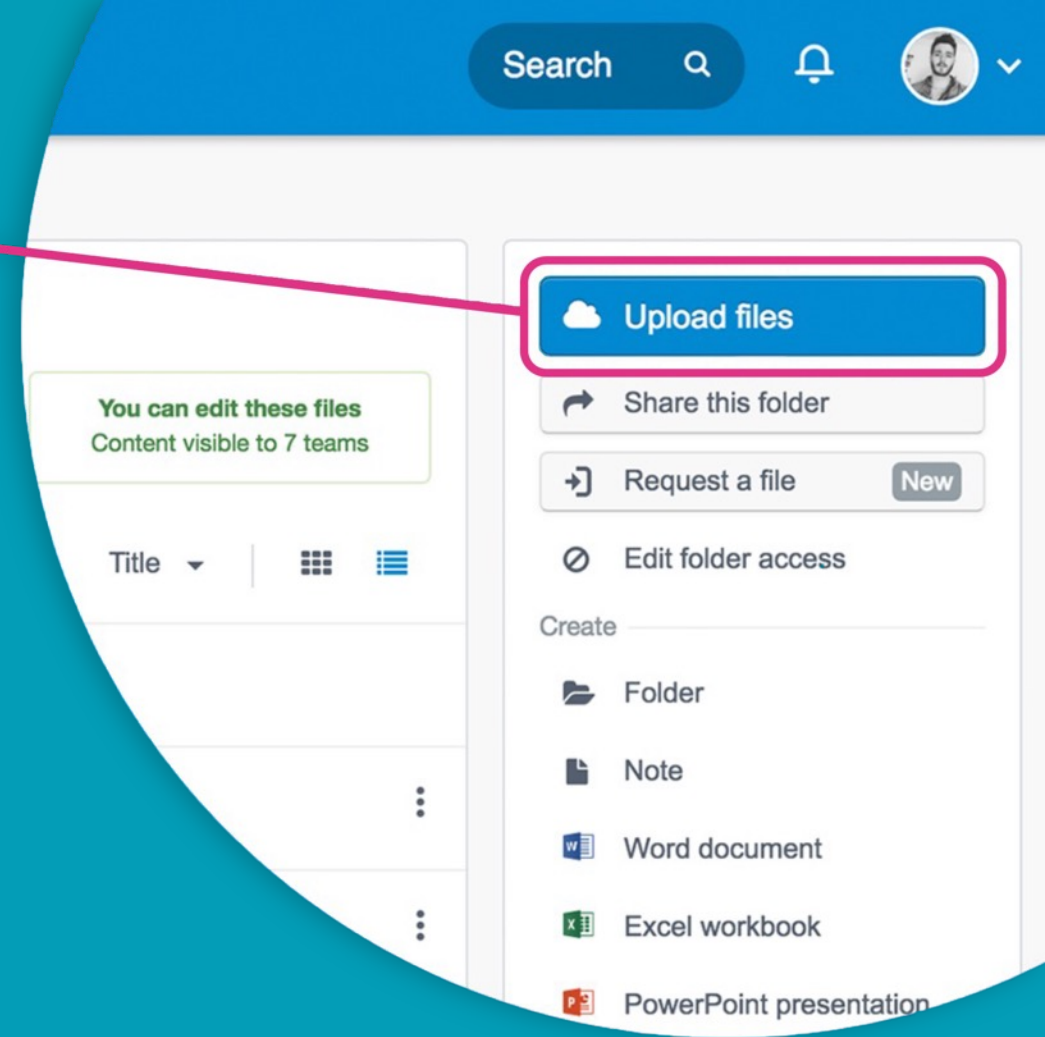
Get started in five **EASY** steps



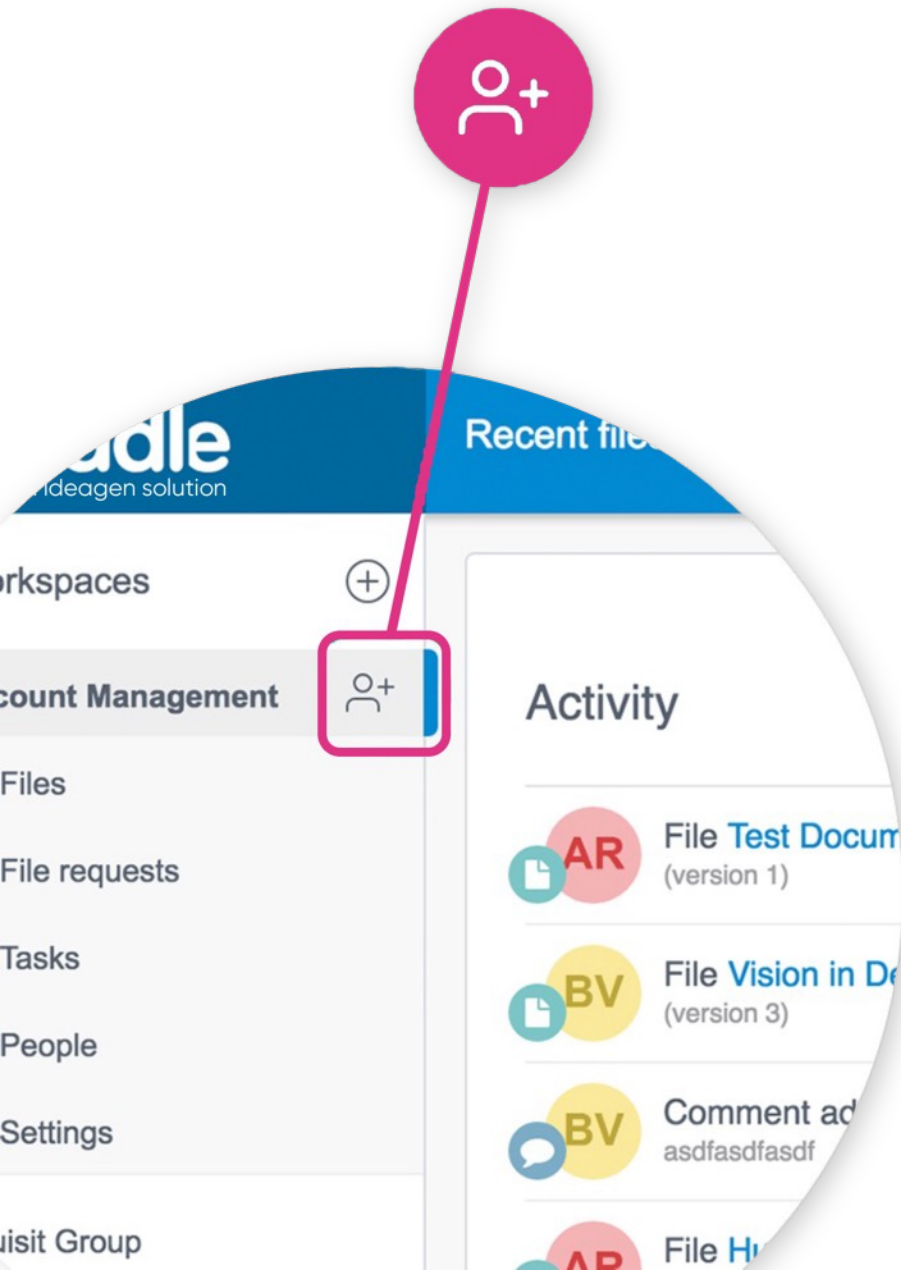
01




Upload a file


-  Go to the **files** tab
-  Click **upload** files
-  Select a file, add a title and description then Click **upload**, or just **drag and drop** files into your browser
-  TIP: There's lots more you can do with files, including editing, sharing, activity tracking and Approvals Find out more online – visit [Huddle Help](#) and search for 'Files'.



Invite your clients and colleagues







-  Click **invite** people
-  Enter the **email** address of the people you would like to work with
-  Type a message, then click **invite**

 TIP: You can create teams and use them to set different access levels for Huddle users. Find out more online – visit [Huddle Help](#) and search 'teams'.

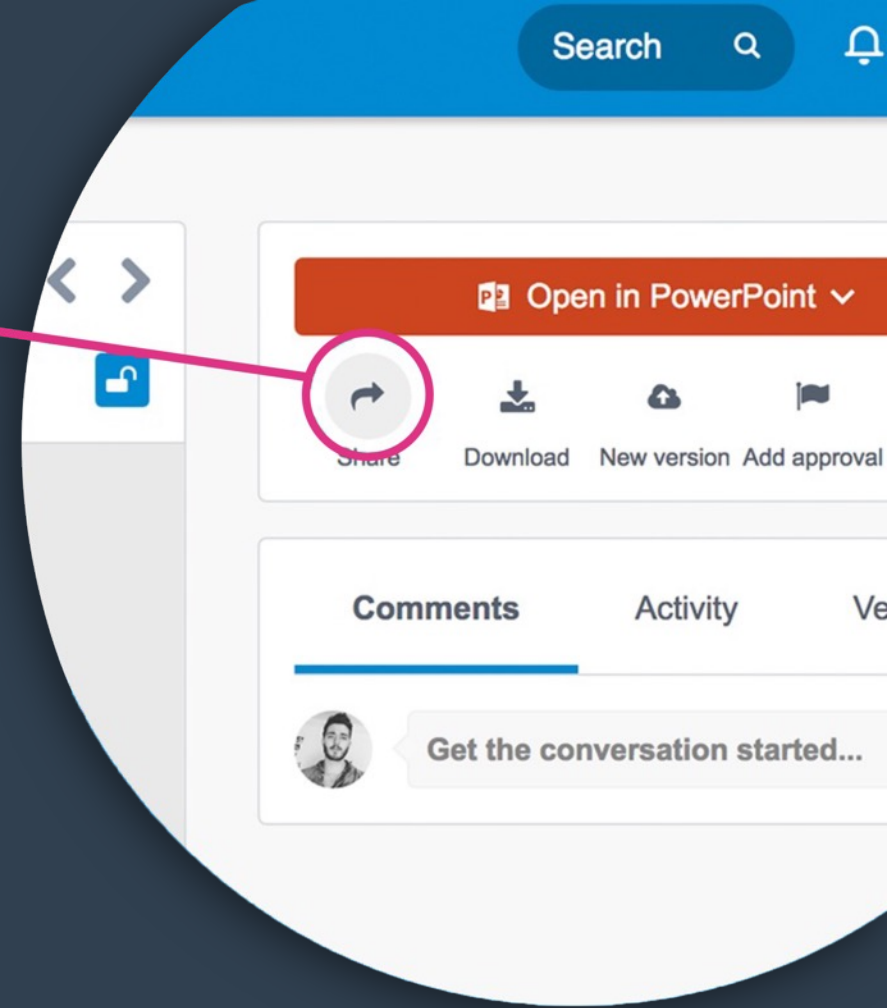
03

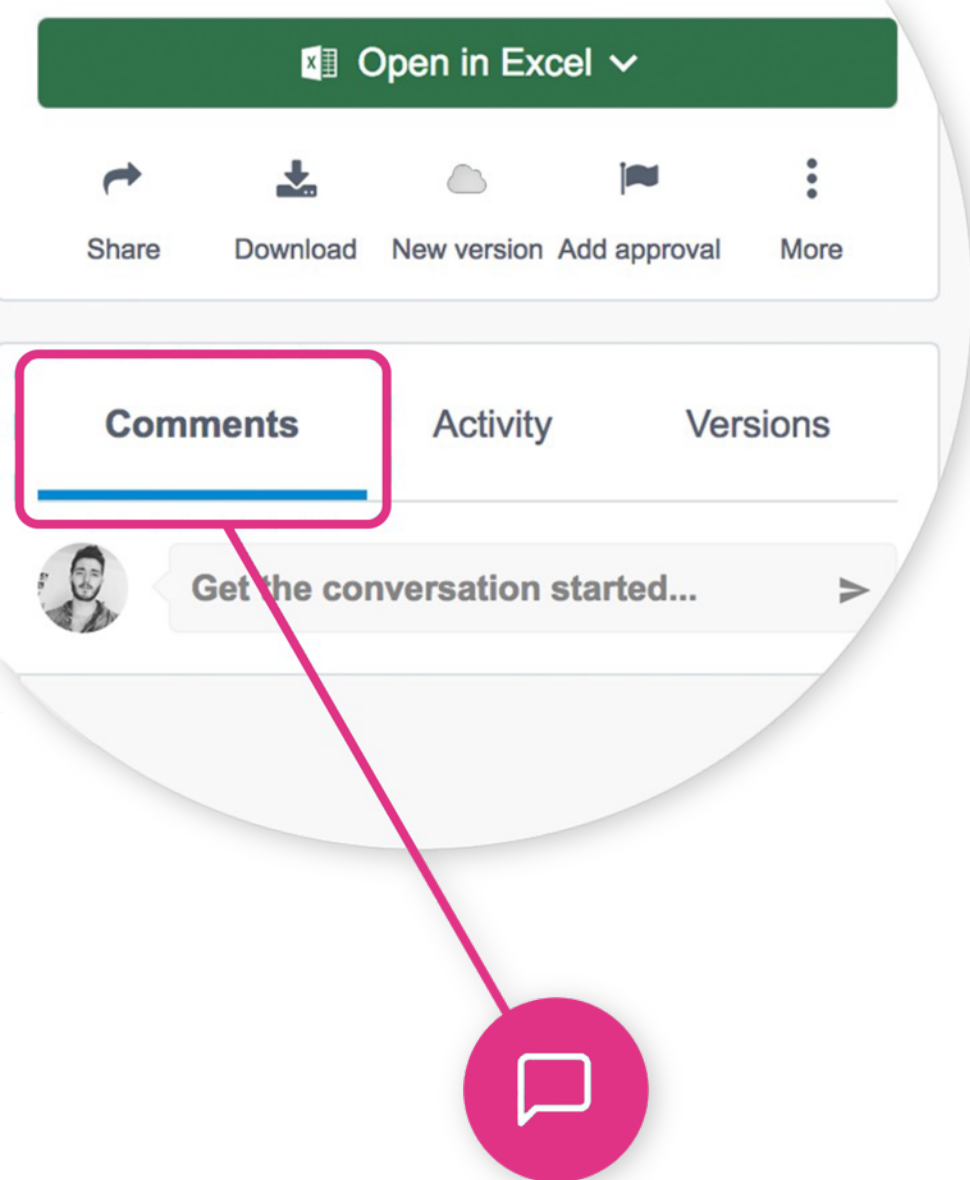
Share a file

-  Navigate to the **file** you just uploaded
-  Click **share**, below the open button
-  Select who you want to **share** the file with
-  Add a message and click **share**








TIP: You can also share whole folders. Find out more online – visit [Huddle Help](#) and Search for 'Share'.










Comment on a file

-  Select a file and choose **comments**
-  Add a **comment**
-  To **mention** someone specific, type @ followed by their name and choose from the list
-  Click the now highlighted **post** icon
-  The recipient will receive an email with the **comment** and a link to the **document**



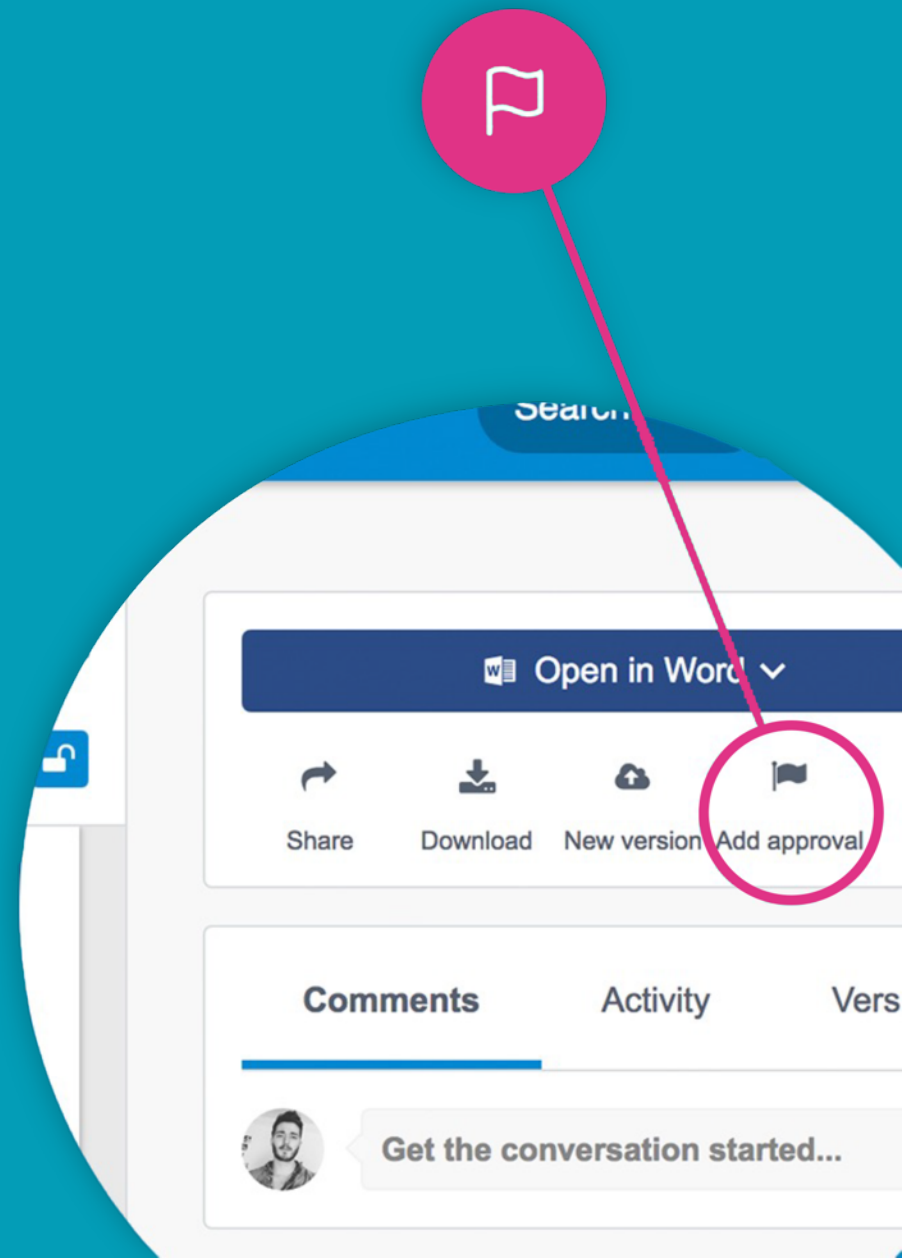
TIP: You can @mention multiple people, teams or even @everyone. Find out more online – visit [Huddle Help](#) and search 'comment'.

Request an approval

-  Go to a file and click **Add Approval**
-  Select **who** needs to approve the document
-  Set a **deadline** for the document to approved
-  Click **Update** to confirm your approval
-  You'll receive an email notification once the document has been **approved**

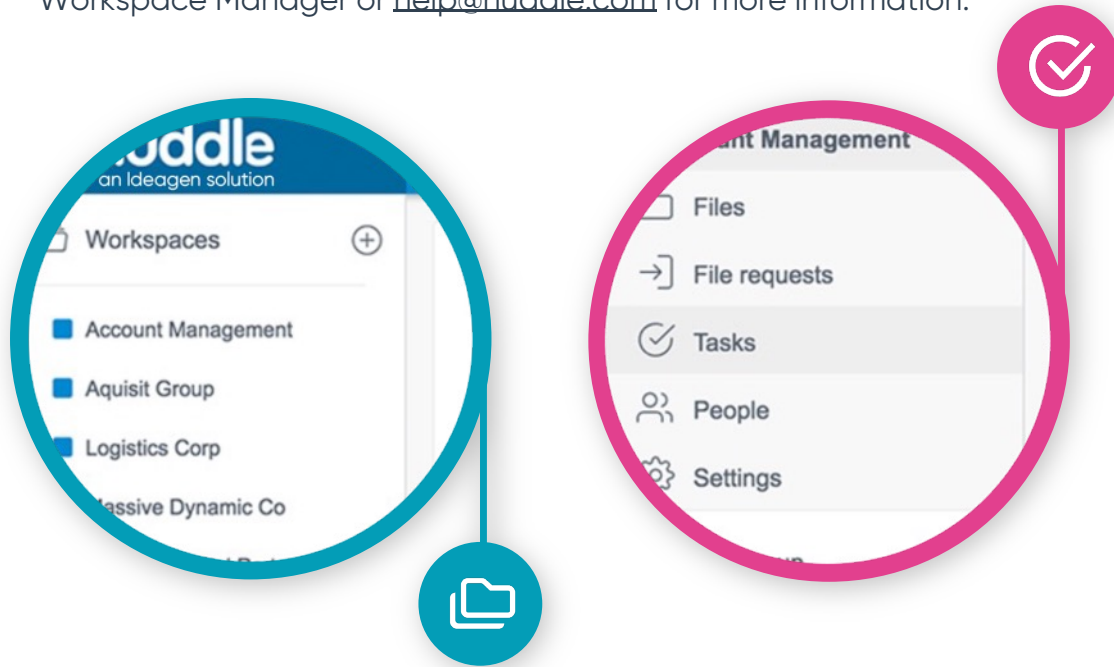


TIP: Once an approval or multiple have been set, they will appear above the action panel, so you can quickly check who is left to approve.



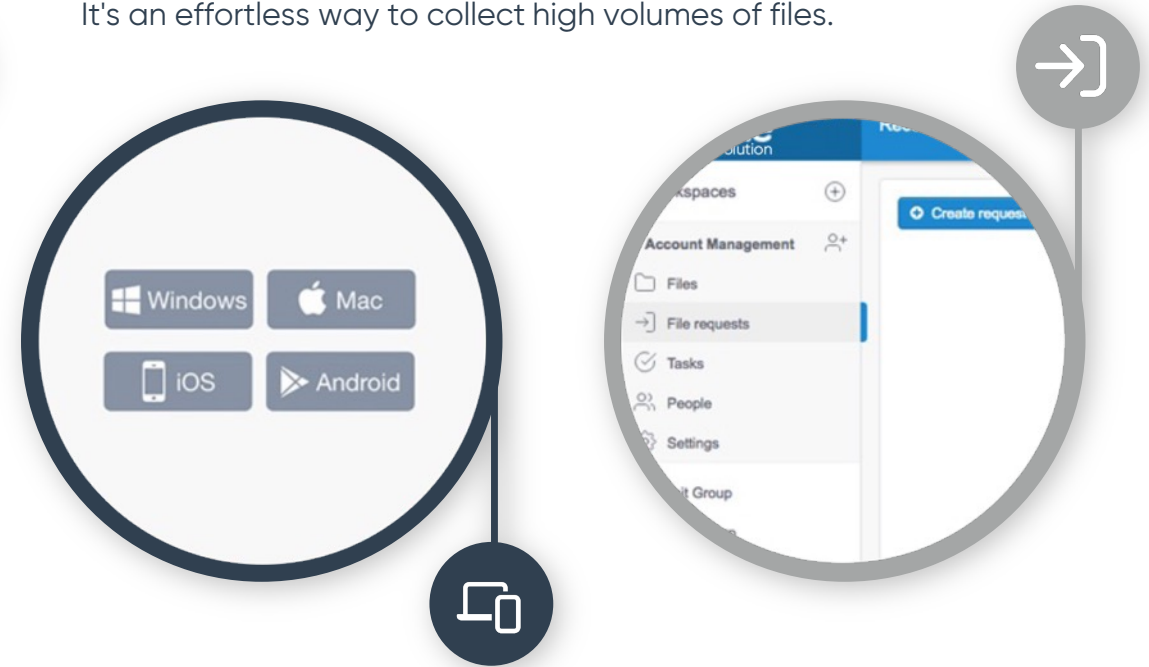
Now do even more

Go to the Tasks tab and create some tasks for your project. Can't see the Task's tab? Some Workspaces have Tasks switched off. Contact your Workspace Manager or help@huddle.com for more information.



Workspaces are secure areas where teams, clients and 3rd parties can come together to manage documents and tasks, share files and securely communicate on a specific engagement or project. The list of Workspaces you have access to can be found in the top left corner of Huddle. Select the Workspace you want to view, or to create a new one.

File requests allow you to gather large amounts of information from people you're working with in Huddle. You can set up requests for certain users to complete and keep track of their progress from the file requests dashboard. It's an effortless way to collect high volumes of files.



Install the Huddle apps for mobile and desktop. Visit: www.huddle.com/product/services