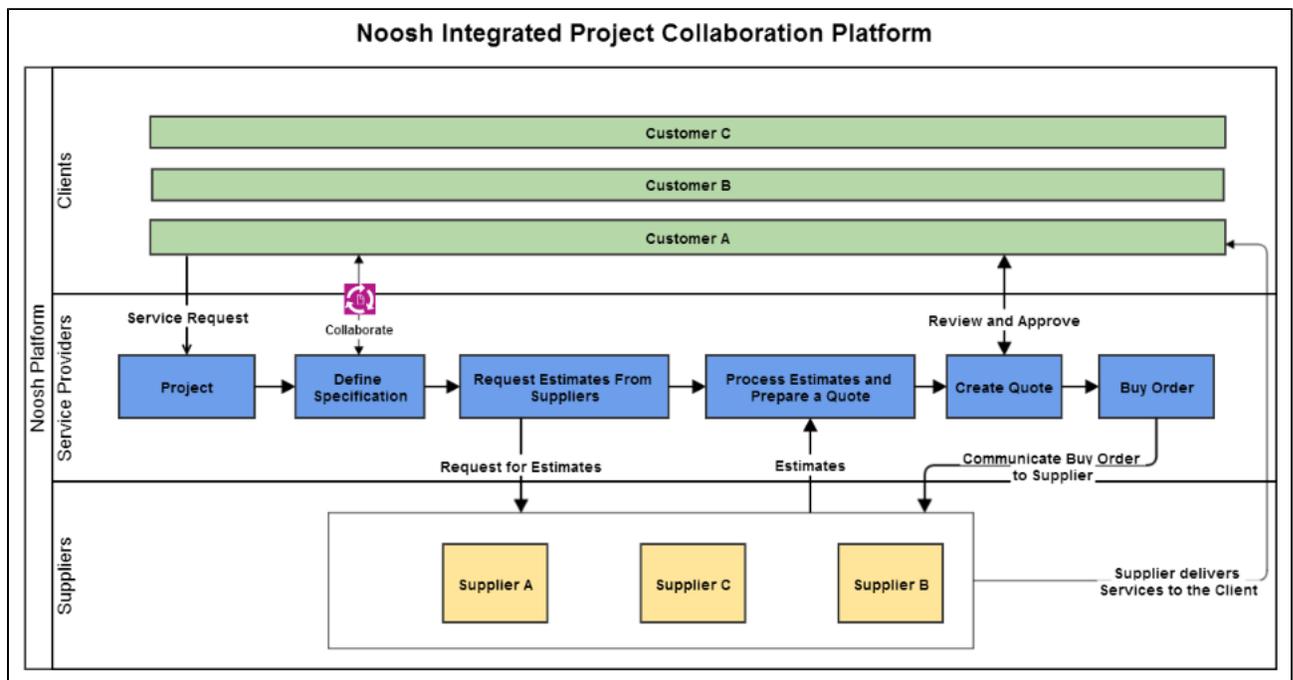


# Noosh Group Edition Implementation

Noosh is a fully integrated project and procurement platform helping service providers thrive in the expert economy. This guide will assist you, the Service Provider, to quickly configure Noosh and begin collaborating with your clients and suppliers to fulfill your their needs. The Noosh Customer Success Team is dedicated to your successful Noosh implementation. You can reach us at [support@noosh.com](mailto:support@noosh.com) / 1-888-286-6674 with any questions. Thank you for choosing Noosh!

## Step-by-step guide

- Summary: Noosh is a flexible saas platform that can be configured to support the way your business functions. Noosh has been successfully deployed by hundreds of Service Providers that operate in the Print, Marketing, Advertising, Web Development, Financials and a variety of specialized service markets. Below is an overview of how the Service Providers, Clients and Suppliers collaborate on the Noosh platform to fulfill their business needs.**



- Noosh implementation can be managed in four easy steps: Noosh is designed from the ground-up to support the Service Provider market. Since a given Service Provider can support one or more clients and multiple suppliers (that are often shared) between different clients, Noosh platform provides "Workspaces" to securely manage the Service Providers, Clients and Suppliers and properly support the collaboration**

between the three entities.

a. **Service Provider Workgroup Configuration: In this step, we'll configure the Service Provider (your) workspace. The first step is to create an account for the Service Provider workspace.**

i. **Create an Account for the Service Provider:**

1. Navigate to <http://admin.noosh.com/service/signup> (PSO will create the account)
2. Provide "Full Name", "Email", "Password" values
3. Select your locale. We currently have 8 languages enabled and we are continuing to work on expanding this list.
4. Select "Default Currency" as "USD" or a currency that your client uses for transactions. Please note that this currency has to match the currency setting you specify when you configure your customer workspace.
5. Provide a value for the "Company" field. This is the name of your company and will drive the personalized URL Noosh will create for your login. For example, if your company name is "Service Worxxs", then your personalized URL will be "http://serviceworxxs.noosh.com".
6. Provide a Phone number and click on the "Signup"
7. After the sign-up, you can immediately begin creating a project by selecting the "Let's Begin" button on the "Welcome to Noosh" page
8. Complete creating the initial project and when done, the Service Provider home page will be displayed. You are now ready to configure the "Service Provider" workspace

ii. **Service Provider Workspace Configuration:**

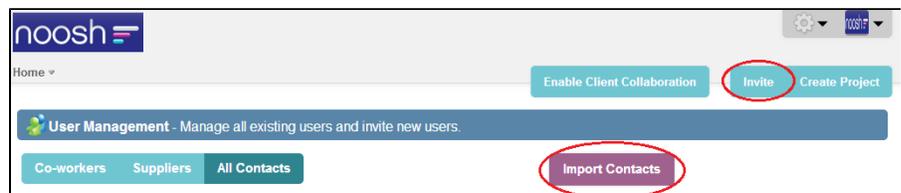
1. **Setup logo:** Hover your cursor over the "Your Logo Here" hyperlink and a small cloud icon will appear as shown below. Click on that icon and select an image file to upload '



2. **Service Provider team (Co-workers) setup:** Once the main service provider account is setup, you can invite the rest of your team members and Suppliers to collaborate on Noosh. **Note:** If you have large number of Supplier and Co-workers and if you maintain them as contacts in Gmail, you can first import all the contacts into Noosh. Once the contacts are imported, you can then assign the right role of "Co-worker" or "Supplier" to the imported contacts.

a. Import contacts from gmail:

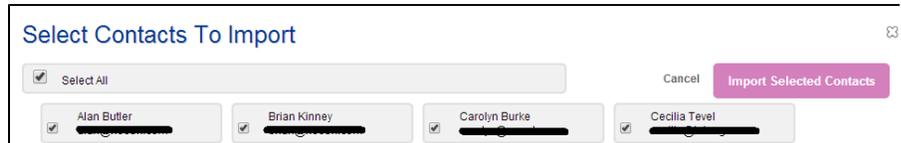
- i. Click on the "Invite" section as shown below and then click on "All Contacts"



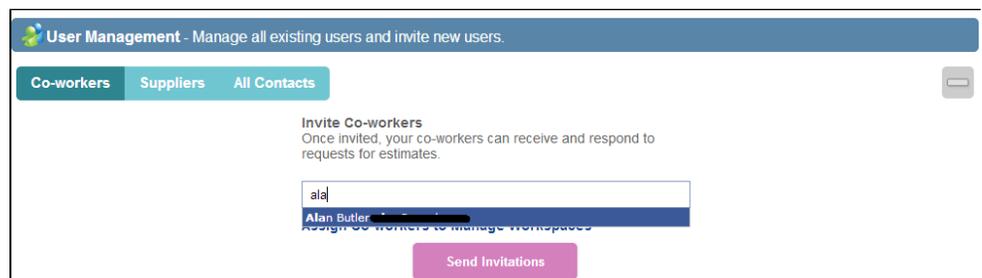
- ii. Under the "All Contacts", you'll see a button to "Import Contacts"
- iii. Click on the button to invoke the "Import Contacts" page. The wizard will select "Gmail" automatically. Click on the "Continue" button



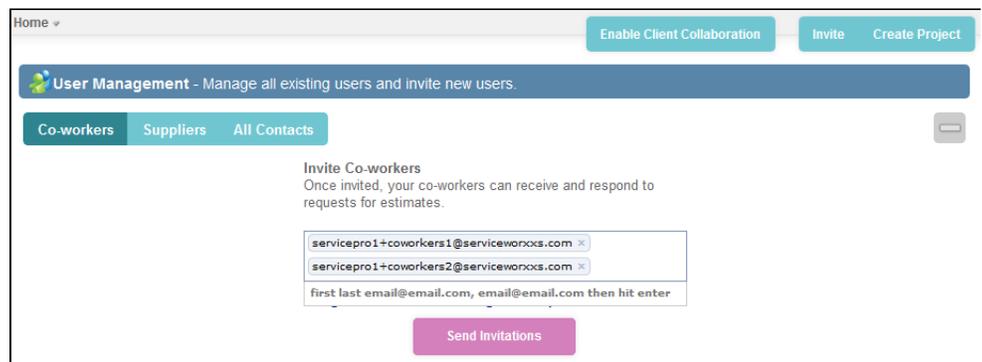
- iv. The next step is to give permission to Noosh to import contacts from Gmail. Click on "Continue" again
- v. Select Contacts to Import. Use the "Select All" button to import all your contacts or just select the ones that are relevant and click on the "Import Selected Contacts" button.



- vi. You have now successfully imported all your contacts from gmail into Noosh. You still have to assign the right role to your contacts which is covered in the next steps
- b. Click on the "Invite" button to open up the "User Management" page
- c. On this page, you have an option to invite your co-workers, Suppliers and Clients. We'll first setup your team i.e. co-workers
- d. Click on the "Co-workers" tab and in the "Invite Co-workers" box, enter the email address of your team. You can enter multiple email addresses by pressing the "Enter" key after each email address. If you already imported your contacts, then as you start typing the name of the contact in the "Invite Co-workers" box, Noosh will auto-pull the contact for easy selection as shown below. If you choose not to import your contacts, then just type in the full email address and hit the enter key



- e. Once all the entries are done, click on the "Send Invitations" button

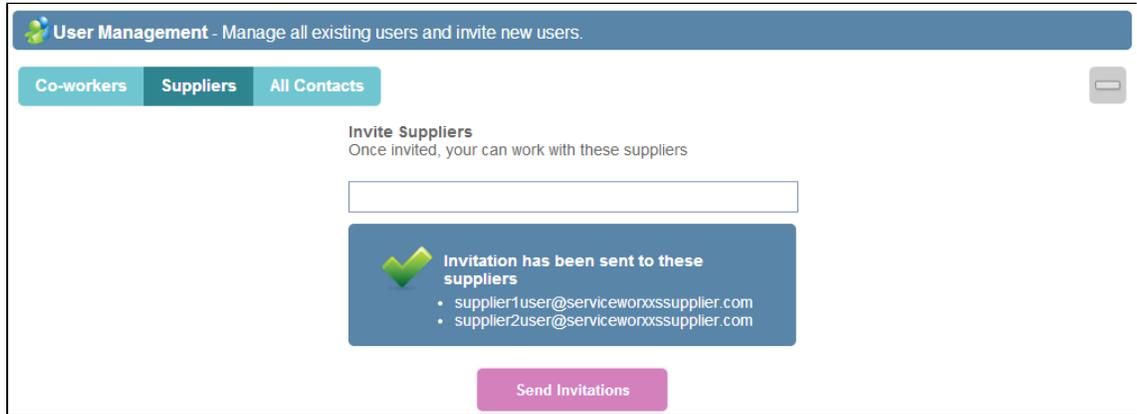


- f. You'll get a confirmation on the page indicating that the invitations have been sent to your team members to sign-up for Noosh

b. **Supplier Workspace Configuration: In this step, we'll setup and invite suppliers to join your Noosh platform for collaboration. Similar to setting the service**

## provider team, it is just as easy to on-board suppliers in Noosh.

- i. Navigate to the "Suppliers" tab right next to the "Co-workers" tab
- ii. Enter your supplier email addresses and click on the "Send Invitations" button. Please note that if you've imported contacts from google as described in the earlier section, it'll be easier to invite suppliers if you have a large number of them.
- iii. You'll get a confirmation on the same page as shown below:

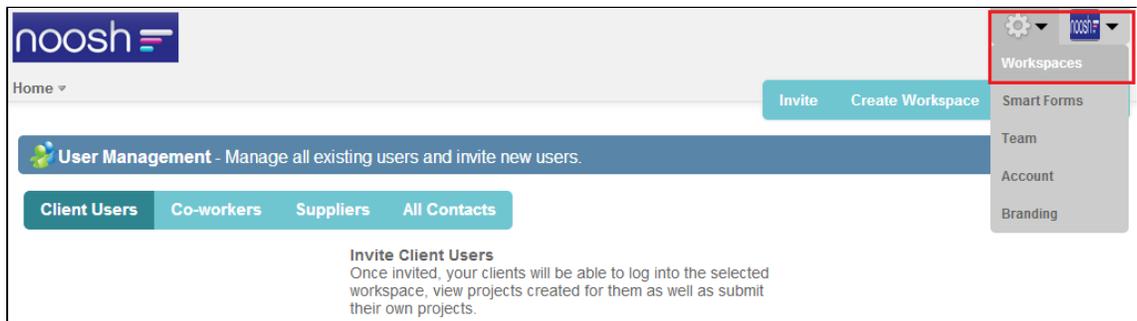


- c. **Client Workspace Configuration: After Service Provider configuration and Supplier setup, the next step is to configure your Client Workspace. This will be your customer-facing component of Noosh and is the most important aspect of your implementation if you decide collaborate with your clients on the Noosh platform.**

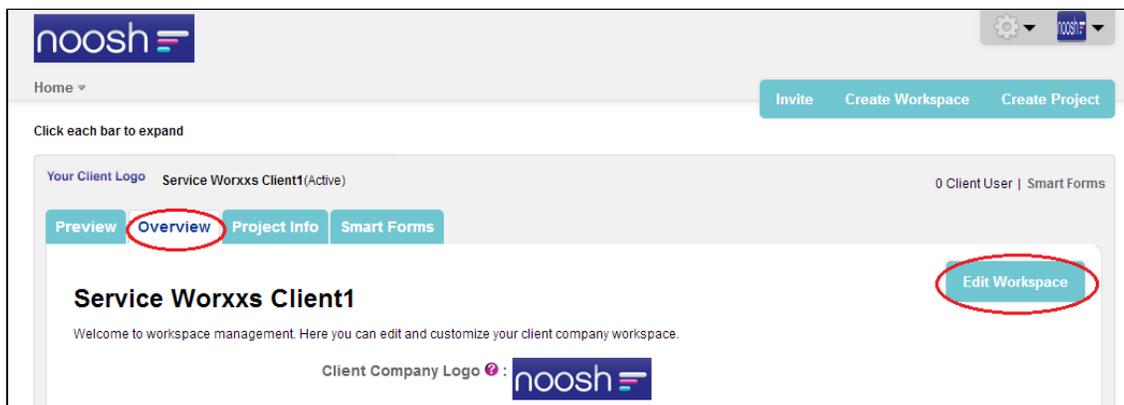
- i. In order to invite your clients to collaborate with you on projects in Noosh platform, you'll first need to enable client collaboration. Click on the "Enable Client Collaboration" button on the home page as shown below



- ii. Review the "Enable Client Collaboration" welcome page and click on the "Enable" button. A new tab called "Client Users" will become available to invite the users. **Important:** Before you invite the client users, you'll first need to setup the Client workspace. The Client workspace is essentially the entire customer-facing application of Noosh platform that you'll expose to each one of your clients. It is very important to configure your client workspace properly to ensure your client users have the best experience in collaborating and conducting projects with the service provider in Noosh.
- iii. A new option called "Workspaces" is now available as shown below. You can create and configure a variety of workspaces to manage your different customers.



- iv. Click on the "Workspaces" option to setup your customer-facing client workspace
- v. Click on the "Edit Workspace" under the "Overview" tab as shown below.



1. Select the appropriate options as applicable to your and your customer business relationship:
  - a. **Client Company Logo:** This is the logo your client users will see when they login to Noosh for project collaboration
  - b. **Client Workspace Status:** Mark it as "active". Ensure the "active" button is in green color to enable the workspace. If you are no longer servicing this customer, you can click on the "inactive" button disable client access
  - a. **Client Company Workspace Name:** As an example, if your client is Walmart Inc, you can name it as walmart. When you tab out of the field, the system will do a name validation to ensure the workspace name is not already in use.
  - b. **Client Company Workspace URL:** This will be the URL you'll share with your clients to login to Noosh
  - c. **Public Signup:** Making it public will allow your client users to discover the site and sign-up over the web without a specific invitation from you. Recommended Setting: No
  - d. **Share All Projects:** Set this value depending on how you want to manage projects with your client. Some clients may want access restrictions to specific individuals on certain projects. Recommended Setting: No
  - e. **Primary Account Representative:** Set this value if you want one primary contact for all the users of this specific customer. All projects initiated for this customer will be automatically sent to the Primary Account Representative.
  - f. **Secondary Account Representative:** This can be the back-up rep for your customers in case the primary is not available for any reason to act on the projects. Recommended Setting: Blank
  - g. **Default Locale:** There are currently 8 options available. This currently controls the display of numbers, dates, etc to the local standard. The language translations will be enabled upon request
  - h. **Default Currency:** Set this to the currency your client would like to use for the transactions. This value can't be changed once transactions are created. Select the right value after consultation with your customer. Also, this setting must match the Currency setting in the Service Provider Workgroup configuration.
  - i. **Allow Buyers to Choose their own Account Representative:** This setting will give the buyers at your customer an option to select a different service provider account representative. Recommended Setting: No
  - j. **Show Products as Icons:** This setting will render the products as icons for your customer. Recommended Setting: No
  - k. Save the overview section

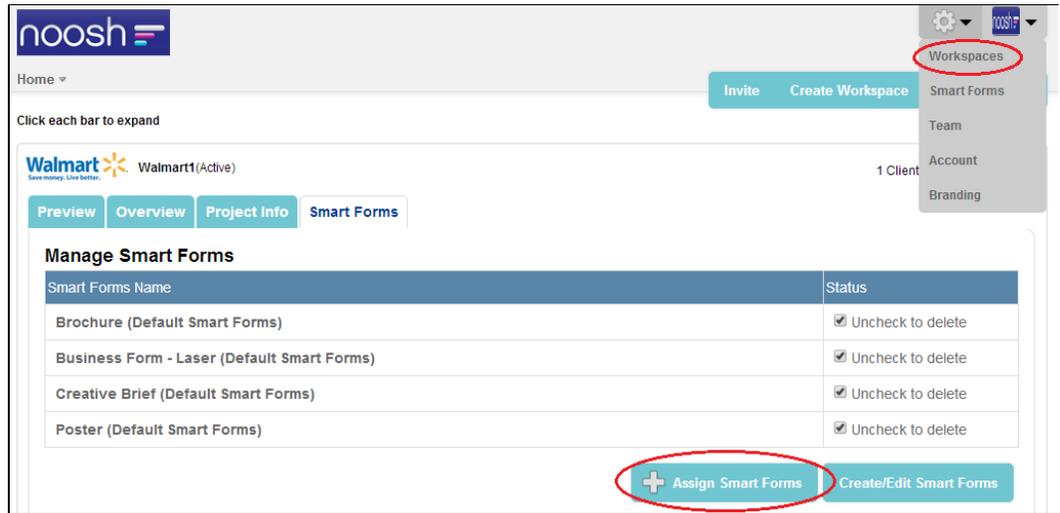
- vi. Click on the "Project Info" tab and select the option to capture project information during project creation.

1. On this page, you have a configuration option to add additional fields you can capture as part of the project. The variety of fields are available on the left side as shown in the picture below
2. Just drag and drop the additional fields you desire to capture on the project. Once you drag and drop the fields, you can click on the field label and edit them to appropriate values When done, click on the "Save" button

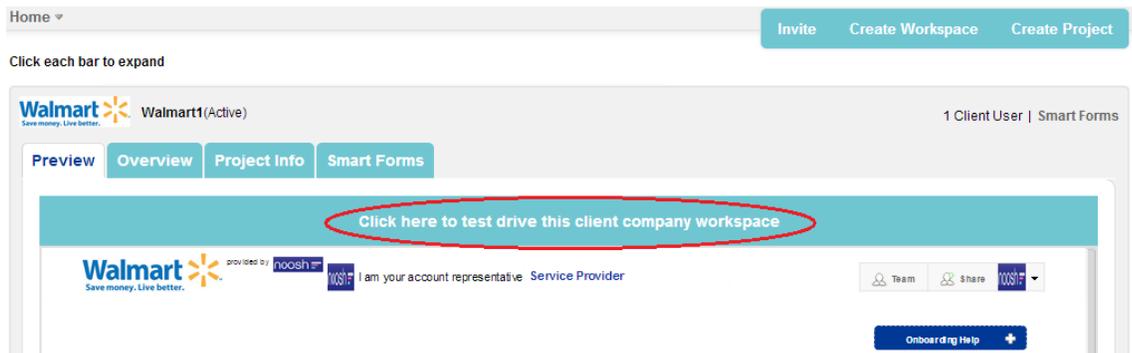
vii. Navigate to the "Smart Forms" tab. Smart forms in Noosh are advanced templates that are designed to help capture the right kind of information for a variety of procurement. Noosh provides several Smart Forms such as Brochure, Envelope, Printed Product, Retail Display, etc. to speed up your Noosh implementation. These smart forms support customization and you can also create new smart forms. Here is a [short video on how to create Smart Forms](#) and use them in Projects.

1. Of the seeded smart forms, you can un-check the ones you don't require. You can also click on the "Assign Smart Forms" button to enable smart forms you may have disabled in the past
2. To create or edit smart forms, you can click on the "Create/Edit Smart Forms"
3. Customizing the smart form is simple. Click on the "Customize" button for the specific smart form, for e.g. "Brochure". **Note: When you customize a seeded smart form, Noosh creates a new form and leaves the original intact. This will allow you to re-use the seeded ones if you need to create new forms**
4. Change the name of the form from "Copy of Brochure" to "ServicePro Brochure"
5. select an icon for this new form by clicking on the "Choose File" button
6. Now click on the "Customization" tab to expose the drag-n-drop editor of the smart form
7. Drag and drop the fields you desire from the left to the tab areas on the right.
8. Remove any fields you don't need from the tabs
9. You can also add additional tabs if necessary and populate it with the required fields as shown below:

10. When done, click on the "Save" to save the smart form and return to the "Smart Forms Management" window
11. Register the newly created smart form so it's available for you to use in the projects for this specific customer. To register the smart form, navigate to the "Workspaces" section as shown below and select the specific client workspace you desire to register these smart forms for use:

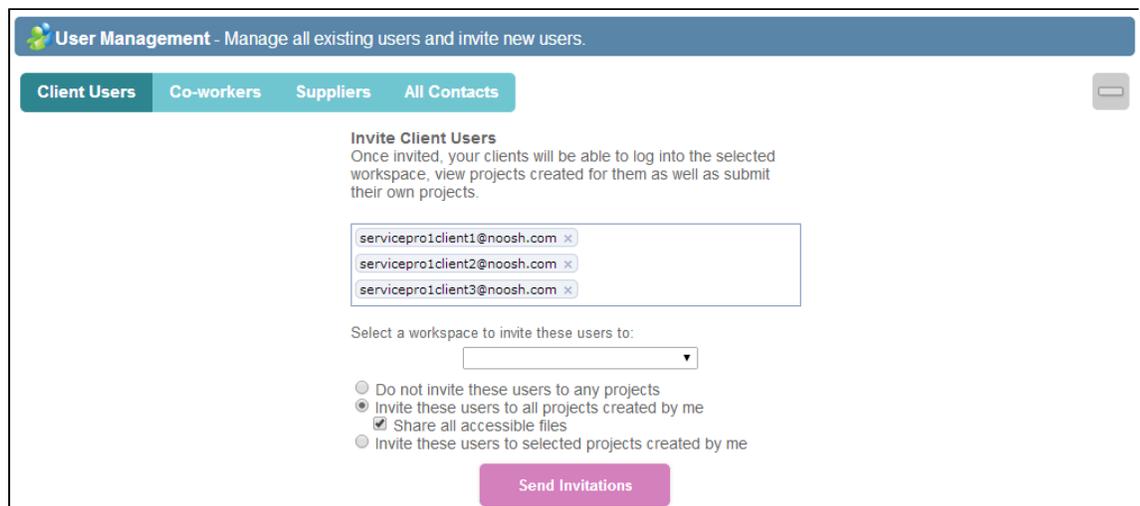


- viii. The client workspace is now configured for you to invite your client users. Noosh recommends the Service Provider test-drive the client workspace to ensure the setup is as desired. This option is available under the "Preview" tab of the client workspace as shown below

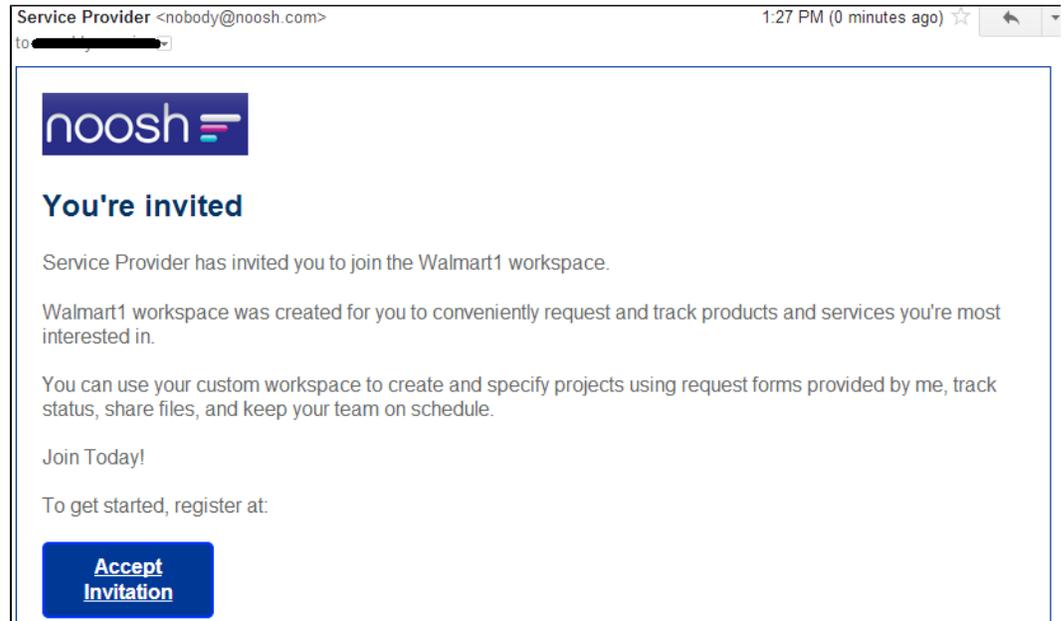


**d. Invite your clients to Noosh: After setting up the Client Workspace, the last step is to invite the client users and initiate the collaboration**

- i. To invite your clients, click on the "Client Users" tab under the "Invite" tab  
Add the client email addresses as shown below:



1. Select the workspace to ensure your client users are added to the correct customer workspace
2. You have options to automatically invite client users to the projects. Select the appropriate options based on your business need
3. Click on "Send Invitations" to complete the invitation. Your client users will get an email notification inviting them to join the workspace and start creating the projects



### 3. Additional Implementation Configuration:

- a. How to create additional client workspaces
- b. How to update your account information
- c. How to update branding