



**FRONT**

USER GUIDE

# FRONT USER GUIDE

Getting Started with Front



## ESSENTIALS

- ◉ Teams That Use Front
- ◉ How To Roll Out Front
- ◉ Quick Start
- ◉ Productivity Tips



## SETTING UP FRONT

- ◉ Downloading Front
- ◉ Adding Your Team Inbox
- ◉ Add Your Own Work Email
- ◉ Update Profile Settings



## MASTERING YOUR INBOXES

- ◉ Team Inbox Settings
- ◉ Rules
- ◉ Canned Responses
- ◉ Reminders & Snooze

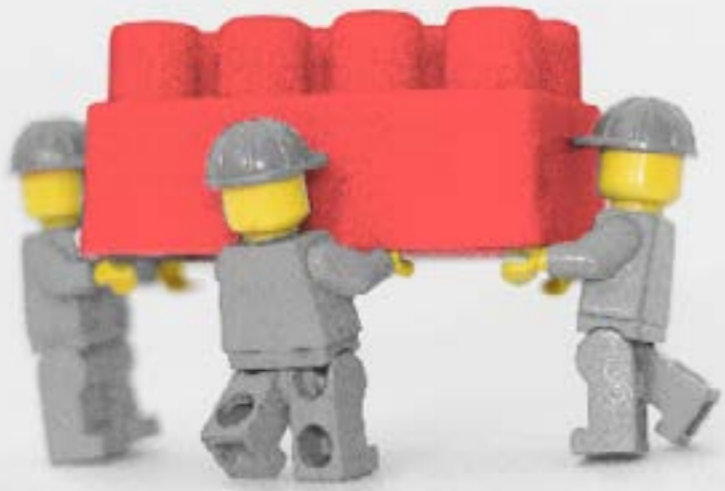


## COLLABORATING ON FRONT

- ◉ Collaboration Overview
- ◉ Commenting & Mentioning
- ◉ Assigning & Following
- ◉ Sharing Drafts



# ESSENTIALS



## 1. TEAMS THAT USE FRONT

« All types of teams use Front to manage their inboxes. »»

An expectation for transparency has become the new norm for a lot of teams, but finding the right technology to match is difficult. Front is a collaboration tool that allows **all types of teams to communicate, collaborate, and get work done with efficiency and transparency.** So in the spirit of transparency, here is how the Front team uses Front!

### Support

Seamlessly manage inbound customer inquiries across 7+ communication channels, escalate technical inquiries through Front issue tracker integrations, and increase customer satisfaction with timely and substantive responses.

### Sales

Set reminders to make sure opportunities don't fall through the cracks, know when your emails are read with seen receipts, and @mention engineers to loop them into more technical conversations with prospective customers.

### Operations

Follow conversations to stay up-to-date on the current landscape of your projects and delegate tasks to owners so projects get completed without a hitch.

### Recruiting

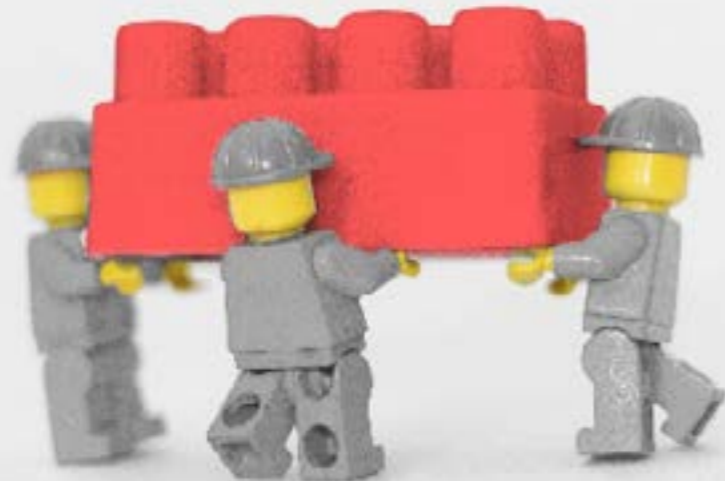
Centralize planning, feedback, and hiring decisions all in one conversation with comments and @mentions. Coordinating with candidates and partnering with hiring managers has never been smoother.

### Engineering

Better understand customer product pain points with an increased transparency between customer-facing and product-focused teams. Integrate Jira / Github, or build a plugin that makes it easier for teams to access the important information they need.



# ESSENTIALS



## 2. HOW TO ROLL OUT FRONT

◀◀ *Things to share with your team before getting them on Front.* ▶▶

Orienting a team to a new product is never easy. After talking with our top power users, here are the things we know are important when it comes to a successful rollout of Front.

### 1. Focus Areas

Letting your team know where they should be focusing their attention is key! As Front helps you consolidate your inboxes, it can be overwhelming for some users to come onto the platform and see all the different inboxes in one place. Help them understand their workspace and which team inboxes they should be keeping an eye on.

### 2. Inbox Zero Mentality

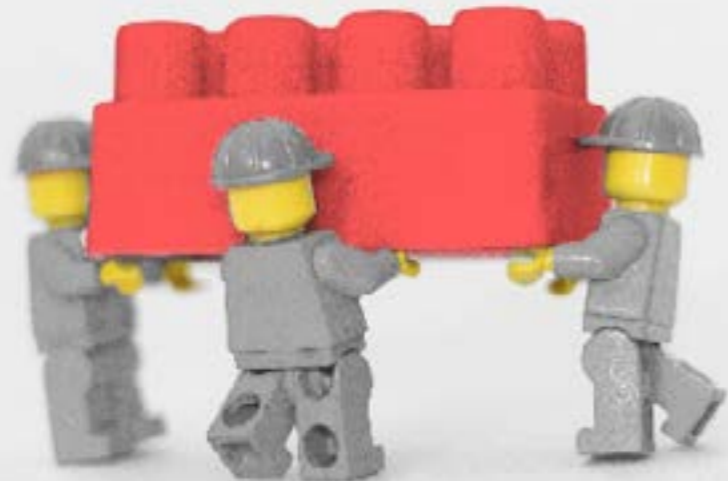
Keeping your inboxes at zero messages will drive your team to work more efficiently and keep a cleaner inbox! Whether it's using Snooze, setting up automated rules, or making sure emails in team inboxes are always assigned to someone, the inbox zero mentality has helped Front achieve more with less.

### 3. Process

Process makes perfect! Having a written playbook or guide teammates can easily access and refer to will make them feel more secure in adopting Front. It's also important to emphasize that moving to Front is not optional, rather a decision that's been made for the team. Remember, it's always tough in the beginning and it's in our nature to complain when we face change.



# ESSENTIALS



## 3. QUICK START

◀◀ *Congratulations, you've joined a Front Team! Follow these three steps and you'll be ready to collaborate in no time.* ▶▶

### 1. Download the apps

Download and install the Front [Desktop](#) and [Mobile](#) app so you can keep in touch with your team no matter where you go and what device you use.

### 2. Complete your user profile

Customize your inbox experience by setting up your mailing preference, notification style, default signature, etc.

♥ [Update your profile now](#)

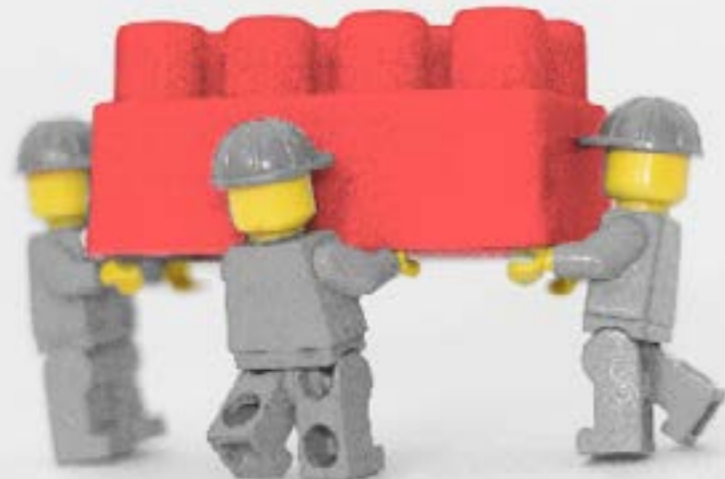
### 3. Add your first team inbox

Connect your team inbox, Twitter and Facebook accounts, Twilio SMS number and more.

♥ [Add one now](#)



# ESSENTIALS



## 4. PRODUCTIVITY TIPS

◀◀ *Master these three productivity tips and use Front like a power user.* ▶▶

### 1. Connect your own work email

Save your precious time by adding your own work address into Front, ex. andersen@frontapp.com.

Your own work inboxes will remain completely SEPARATE and PRIVATE, but they'll be centralized and easily accessible across all your devices.

[More benefits](#)

### 2. Keyboard shortcuts

Quickly navigate Front using product shortcuts. Typing 'A' to Reply All, 'E' to Archive, and 'M' to Comment are just some of the shortcuts we have.

[More shortcuts](#)

### 3. Advanced search

Search with precision and surface more relevant results using Front's advanced search parameters. Type '+' in your search bar to see a list of available parameters.

[More on search](#)



# SETTING UP FRONT



## 1. DOWNLOADING FRONT

◀◀ *Front's desktop and mobile apps sync seamlessly, so you don't miss a beat when you're on the move* ▶▶

### Installing Front on Desktop

1. Visit this page and [download Front's desktop client](#).
2. Open the downloaded file and double-click the Front logo to begin.
3. Enter your Front account information to log in. If you don't have an account, ask your Front administrator to invite you.
4. You're done!

### Installing Front on Mobile / Tablet

1. The Front mobile and tablet apps are available in [iTunes](#) or [Google Play](#).
2. Enter your Front account information to log in. If you don't have an account, ask your Front administrator to invite you.
3. You're done!



# SETTING UP FRONT



## 2. ADDING YOUR TEAM INBOX

« Front gives your team transparency into your shared inboxes - know who's working on what. »»

Before you add your team inbox, it's important to think about how you want your team inboxes to work. Front brings an unprecedented level of flexibility to managing team inboxes. Here are some **Advanced** ways you can set up your inboxes with Front:

### CONSOLIDATE SIMILAR INBOXES:

Work more efficiently by consolidating similar communication channels into 1 inbox. Instead of managing your help@ and Twitter support conversations in 2 separate inboxes, with Front you can consolidate all of them into 1 inbox called 'Support'.

### IMPLEMENT TIERED STRUCTURES WITH FOLDERS:

Better prioritize the work that comes through your support@ address by creating a 'Tier 2' and/or 'Urgent' Folder.

### Connect your team inbox

- # Select the type of inbox or folder you want to add.
- # For Gmail, Office 365, Twitter, Facebook, Twilio SMS, and live chat inboxes, authenticate using your account credentials.
- # Grant access to the teammates who will be working in those inboxes.
- # For non-Gmail and non-O365 email inboxes - you'll have to set up email forwarding into Front. Please work with your email provider admin / IT admin to get [email forwarding set up](#).





# SETTING UP FRONT



## 3. ADD YOUR OWN WORK EMAIL

◀◀ Working with your team doesn't just apply to your shared inboxes. Add your own work address in Front to loop teammates into conversations they need to be a part of. ▶▶

### HIGHLIGHTS:

- # Your work inbox is kept **Private** by default
- # You'll be able to share specific conversations with teammates, without having to share your entire inbox
- # Have your teammates cover your inbox when you're sick or out on holiday, without having to share your personal password
- # Centralize your workspace so you don't have to switch back and forth between Front and your inbox

### Connect your own work email

- # Select the type of inbox you want to add.
- # For Gmail, O365, Twitter, Facebook, Twilio SMS, and live chat inboxes - authenticate using your account credentials.
- # Grant access to the teammates you want to share your inbox with.
- # For non-Gmail and non-O365 email inboxes - you'll have to set up email forwarding into Front. Please work with your email provider admin / IT admin to get this set up. [Instructions here.](#)



# SETTING UP FRONT



## 4. UPDATE PROFILE SETTINGS

◀◀ *Set preferences that work for you.* ▶▶

### Profile

Change your account login information, enable two factor authentication for additional security, or mark yourself as Out of Office.

### My Preferences

Set the **default email address** you use when composing a new message or replying to an existing conversation, make Front your default email client, update your snooze timing options and more.

### Notifications

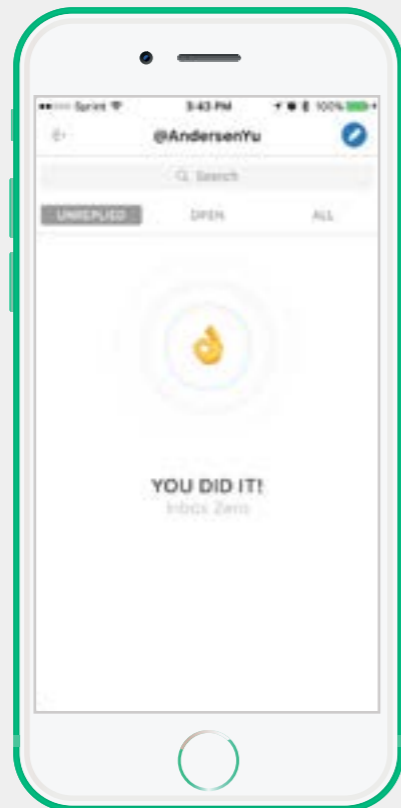
Enable desktop push notifications, mobile push notifications and email notifications for actions you want to stay on top of.

### Signatures

Create a signature for every occasion. Front designates the first signature as your **default signature**, so make sure the signature you want to use is at the top. Also, update the signature's **sender info** to the name you want your messages to be sent from.



# MASTERING YOUR INBOXES



## 1. TEAM INBOX SETTINGS

◀◀ *Understand all the ways you can customize your Front team inbox for your team. To edit your inbox settings, click any one of your team inboxes [here](#).* ▶▶

Based on your team's structure and availability, here are some of our inbox setting suggestions.

### PART-TIME TEAM:

If you have a part-time workforce, it's best to **disable auto assign conversations on first reply**, so no conversations are assigned to team members when they are out of the office. We also suggest the time for **conversations to go inactive** in 2 days.

### FULL-TIME TEAM:

Here at Front, we **enable auto assign conversation on first reply**, so the customer has a consistent experience when they write to Front. We also set conversations to go inactive after 5 days.

### Overview

The settings here will be applied to all the communication channels within this inbox. You can set an inbox **Color** to make it easier for your team to identify where a particular conversation originated.

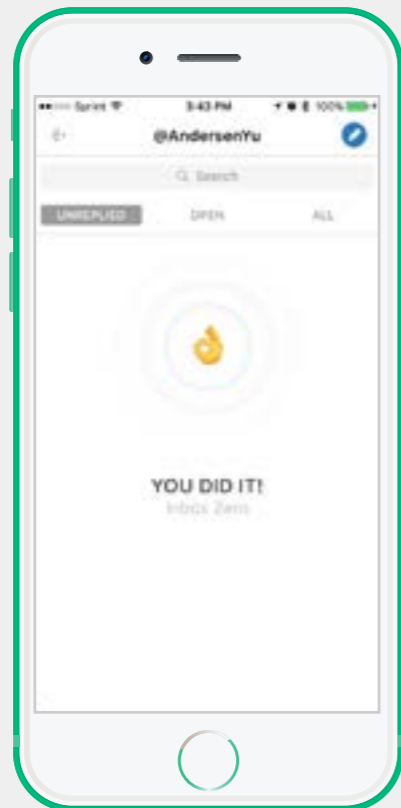
#### Color

Will appear on every conversation that is part of this inbox.

● #51E151 ▼



# MASTERING YOUR INBOXES



You can also utilize the **Conversation Inactivity** functionalities to have inactive conversations automatically move back into the team inbox, unassigned, when a conversation has been archived for a specified amount of time. This will ensure messages are always handled by someone who is available.

## Conversations become inactive after

If a conversation receives a new message after becoming inactive, it will be considered as new in the analytics.

5 days 00 hr ▾

## Unassign inactive conversations

Inactive conversations will get unassigned when they receive a new message.



## Access

Manage a list of users who has access to a specific team inbox in **Access**. Just check the box next to the user you want to give access to and save.

### These teammates have access to Support - (Tier 1)

<input checked="" type="checkbox"/> Name	Email
<input checked="" type="checkbox"/> Andersen Yu	andersen@frontapp.com
<input type="checkbox"/> Ashley Hahn	ashley@frontapp.com
<input checked="" type="checkbox"/> Ben Eachus	ben@frontapp.com

## Channels

This is where all the customization happens! By default all your team inboxes have **Undo Send** enabled. You'll have a 9 sec window to cancel a message from being sent, in case you need to.

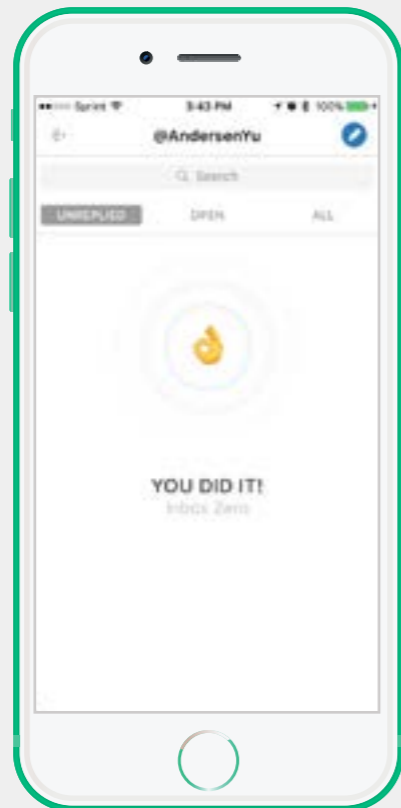
## Enable undo send

Front will wait for a few seconds before sending your messages.





# MASTERING YOUR INBOXES



Another feature that's enabled by default is **Auto Assign Conversations on First Reply**. When a teammate takes the initiative to be the first responder on a message in a team inbox, Front will automatically assign the conversation to them.

The conversation will stay assigned to that teammate until 1) the teammate unassigns the conversation themselves or 2) the conversation goes inactive and you have the "unassign inactive conversations" feature enabled.

## 2. RULES

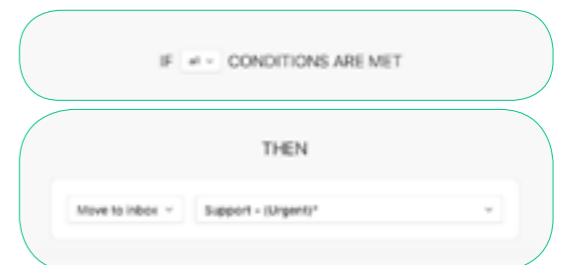
◀ Automating your workflow just got easy. ▶

### FRONT TIP:

Take a step back and think about all the repetitive tasks you do. Front's rule engine allows you to automate a wide range of actions based on the parameters you set. Save time in the long run by implementing some of our most popular rules. Once you've done that, create your first rule [here](#).

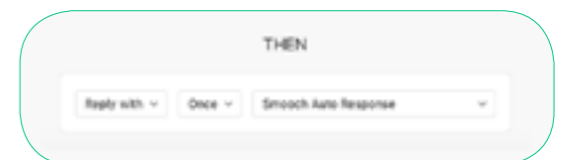
### Move

Use this rule to move messages based on a subject line, SLA commitments, or even a group the sender belongs to.



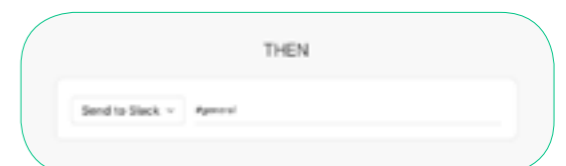
### Auto-Responder

Send a first reply to your customer so they know what they can expect from you.



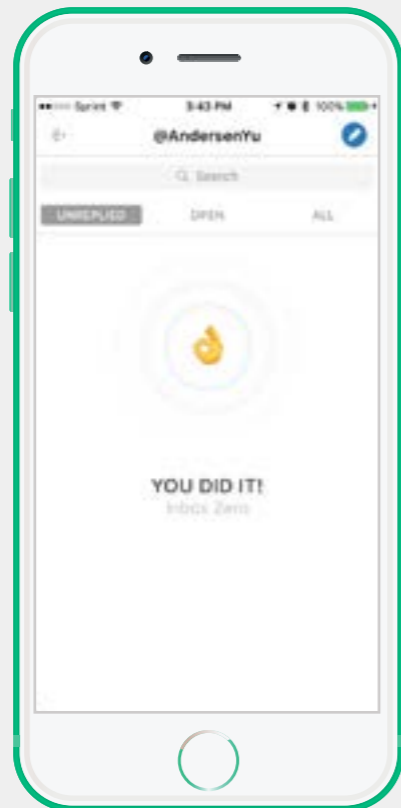
### Send to Slack

Notify a slack channel or a teammate whenever your conditions are met.





# MASTERING YOUR INBOXES



## 3. CANNED RESPONSES

« Stop wasting time writing the same things over and over again. Create your first canned response [here](#). »»

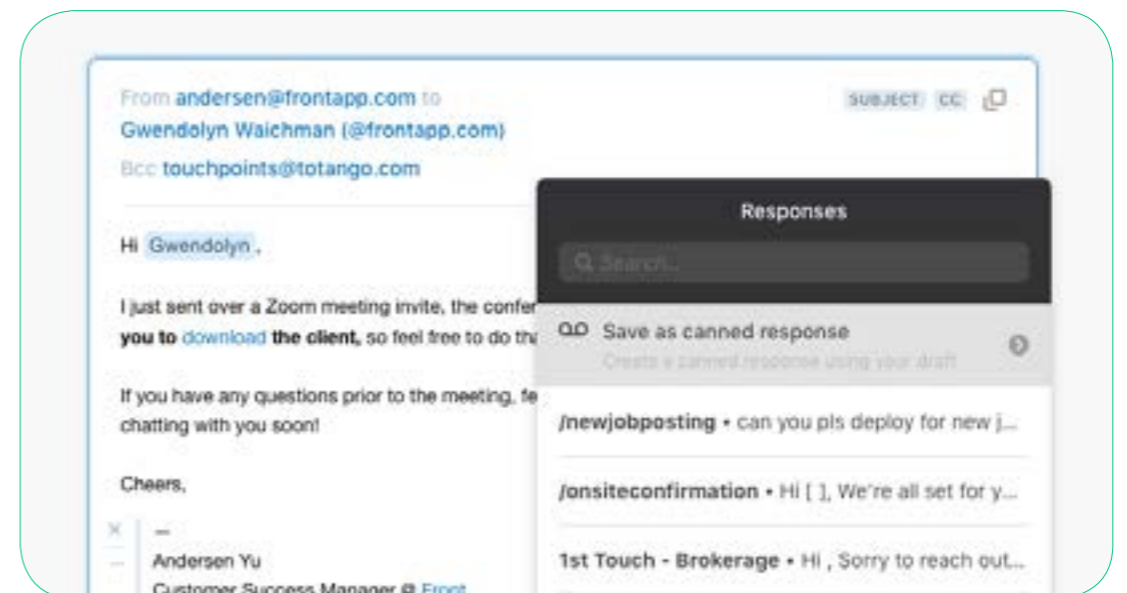
### FRONT TIP:

Having all of your canned responses stored in one place can get really messy, really quickly. Here at Front, we organize our responses by department or person. When creating a canned response, think about who else could benefit from it. If it's a canned response for the support team, label it with 'Support - canned response.' Or if it's a personal canned response then label it accordingly, 'Andersen - canned response.'

### Benefits

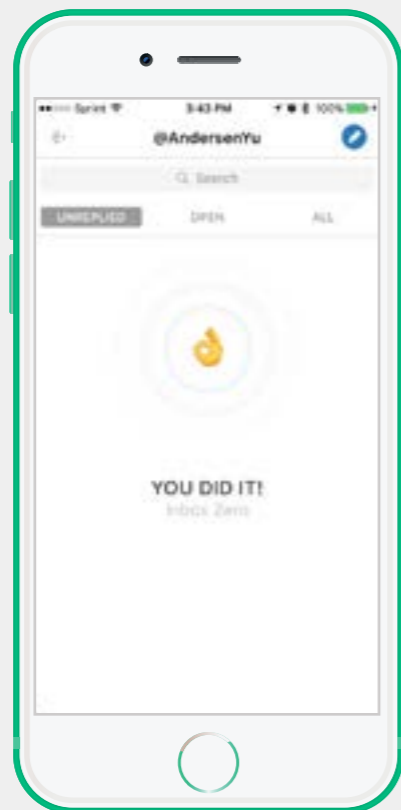
Here are some of the benefits for using canned responses and how to master them:

- # Your team ends up using a consistent voice when communicating with customers.
- # Having dynamic variables in your canned response allow teams to find the right balance between being efficient and still being personal.
- # You can save new canned responses directly from the composer.





# MASTERING YOUR INBOXES

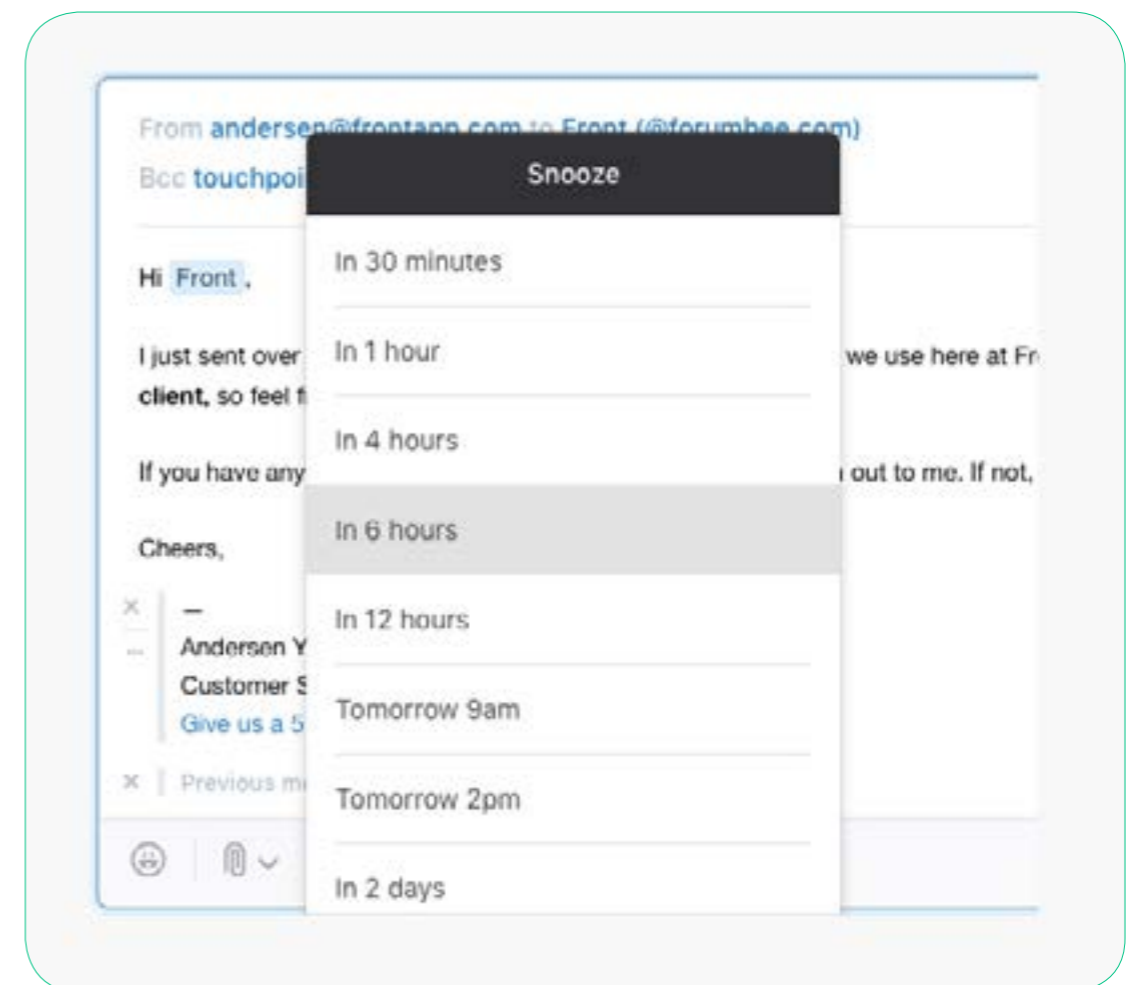


## 4. REMINDERS & SNOOZE

◀◀ *Keep your inbox clean and never forget to follow up with people.* ▶▶

### Overview

A common pitfall for teams is the misconception that their job is done after they send off that first initial message or reply. That's really only 25% of the job. The other 75% is follow-up. Set a reminder when sending messages to ensure follow up when you don't receive a response and snooze messages to clean up your inbox and focus on the work you need to do.





# COLLABORATING ON FRONT



## 1. COLLABORATION OVERVIEW

« *Everything works better when you work as a team.* »

### Overview

Front brings the ability to have internal communication directly alongside every conversation so teammates don't lose context and don't get sidetracked by noisy channels.

### Shared Team Inbox:

In your shared inboxes, collaboration is a necessity. You can comment and mention anyone on your team to have them chime in on the conversation you're working on. You can also assign new work or reassign existing work to other teammates. And lastly, you can follow conversations you're curious about but not taking the lead on.

### Private Work Inbox:

One of the many extra benefits to adding your own work inbox in Front is being able to use the collaboration features whenever you need them. Though your inbox is private, you have the ability to share one-off conversations with specific teammates. If you share a conversation from your own work inbox, Front will always prompt you to confirm you want to share that specific conversation with a teammate. It's the perfect line between the privacy you demand and the flexibility you want.





# COLLABORATING ON FRONT



## 2. COMMENTING & MENTIONING

« Communicate with your team in real time and get work done faster. »»

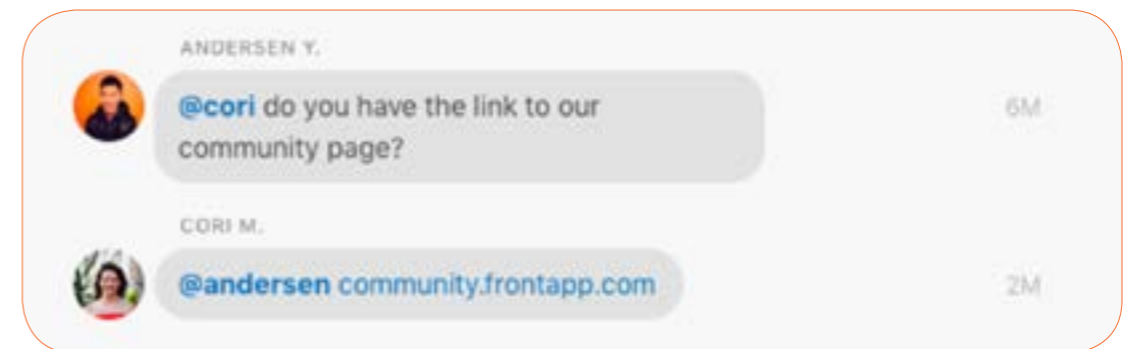
### HIGHLIGHTS:

- # Type '@username' to mention and notify someone on the team
- # Use '@all' to mention everyone who has access to a specific inbox

### Overview

While some can be subject matter experts at everything, most of us aren't. That's where commenting and @mentioning come into play. Navigate to the comment bar at the bottom of your conversation panel and type '@username' to mention and notify a particular person on your team.

You can also '@all' to send a push notification to everyone who has access to that shared inbox. Another unique way to use the commenting feature is for taking notes when on talking to a customer — this will allow you to follow up with clear action items and next steps.





# COLLABORATING ON FRONT



## 3. ASSIGNING & FOLLOWING

« Have ownership across your inboxes and prevent duplicate work. »»

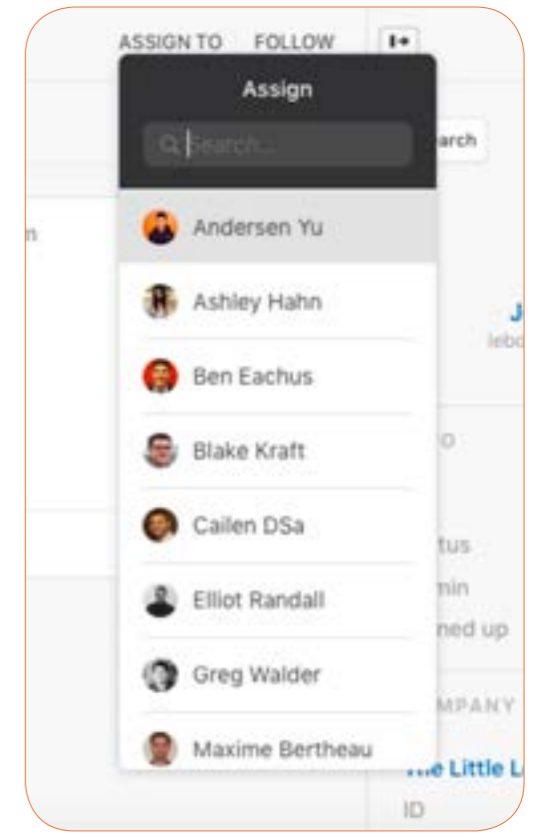
**HIGHLIGHTS:**

- # Conversations are auto-assigned to the first responder by default
- # Don't archive conversations you're following, just unfollow them

### Overview

One of the key issues faced by teams is duplicating work in shared inboxes or having things fall through cracks because no one knows who is responsible. With Front, we address this by **auto-assigning messages** to first responder or by allowing teams to delegate conversations to other members proactively. If you don't have the bandwidth to handle something you've been assigned, just unassign it or reassign it to someone else on your team.

Front also has a **Follow** feature, which allows teammates to follow a conversation they're not assigned to and receive notifications about activities on that conversation. Anyone who participates in that conversation, by either making a comment themselves or being @mentioned by someone else on the team, will automatically follow the conversation. If you're following a conversation that you don't want to receive notifications for anymore, just unfollow it, but don't archive it.





# COLLABORATING ON FRONT



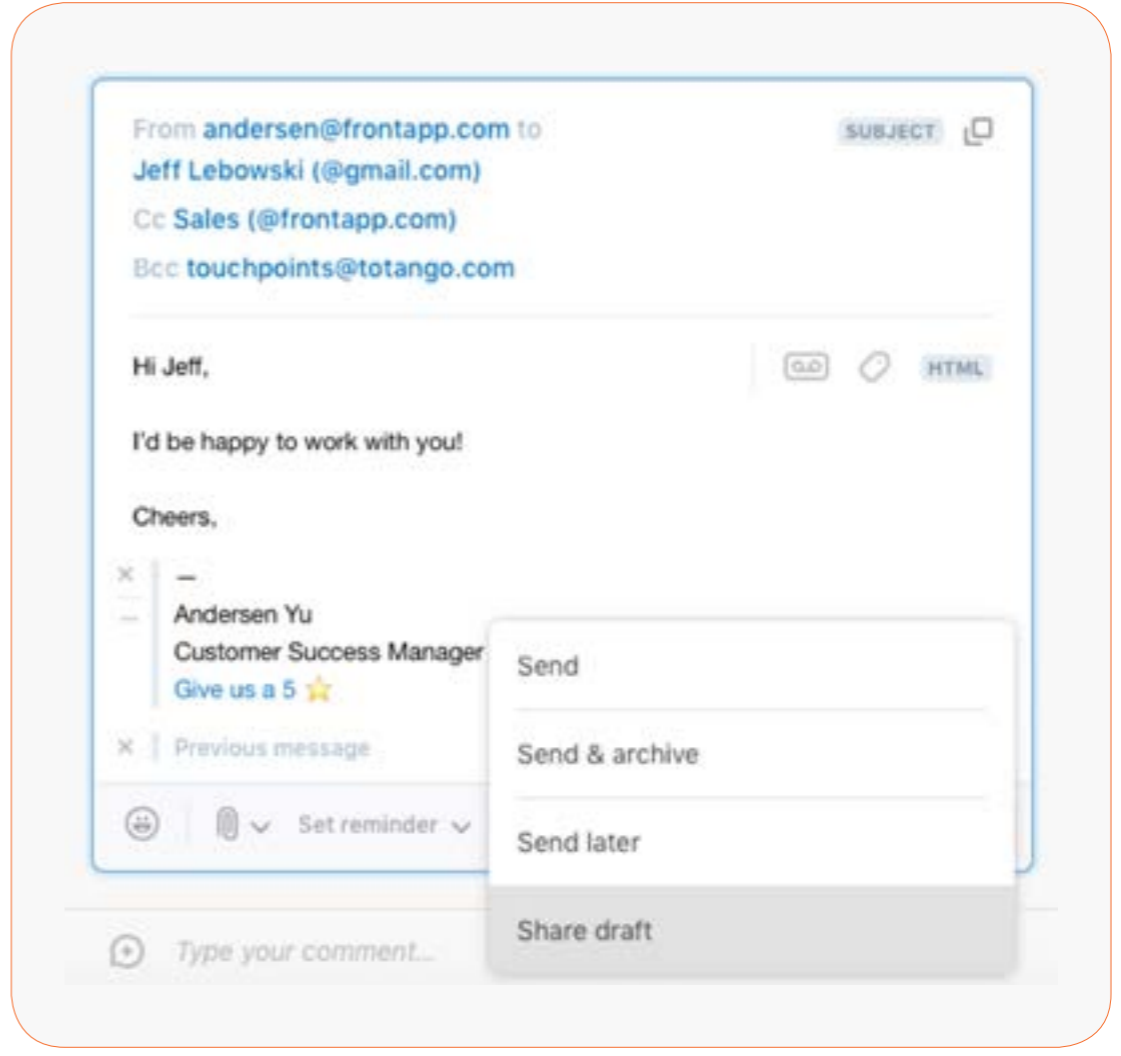
## 4. SHARING DRAFTS

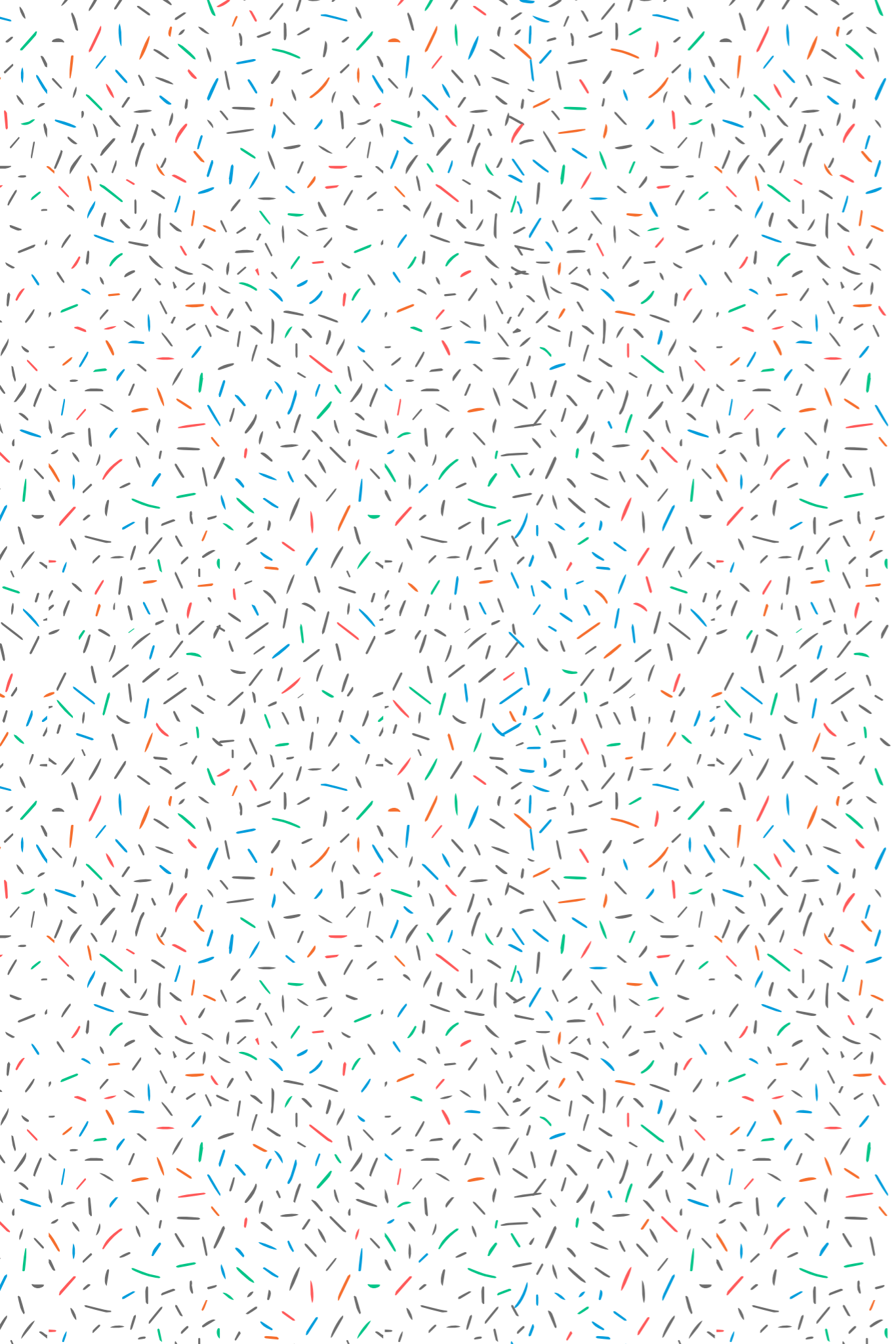
◀ Sometimes we just need a second pair of eyes. ▶

### Overview

Similar to collaborative editing for docs and presentations, Front allows you to share your draft with other teammates. They can then take over your draft and make edits. All edits will be made in real time, so you can follow along and see where changes are being made. Shared drafts can only be edited by one teammate at a time to prevent conflicts from being made.

Check out our video demo [here](#).





# THANK YOU FOR READING

For more content visit [community.frontapp.com](https://community.frontapp.com)