teamflect

Teamflect Quick Start Guide

Teamflect brings your performance management, feedback, and team collaboration tools into one place. This guide will help you get started with Teamflect, learn the basics, and discover key features.

Get Started with Teamflect and Maximize Your Team's Potential

Set up

Seamlessly integrate Teamflect into your workspace and get ready to boost team performance with ease.
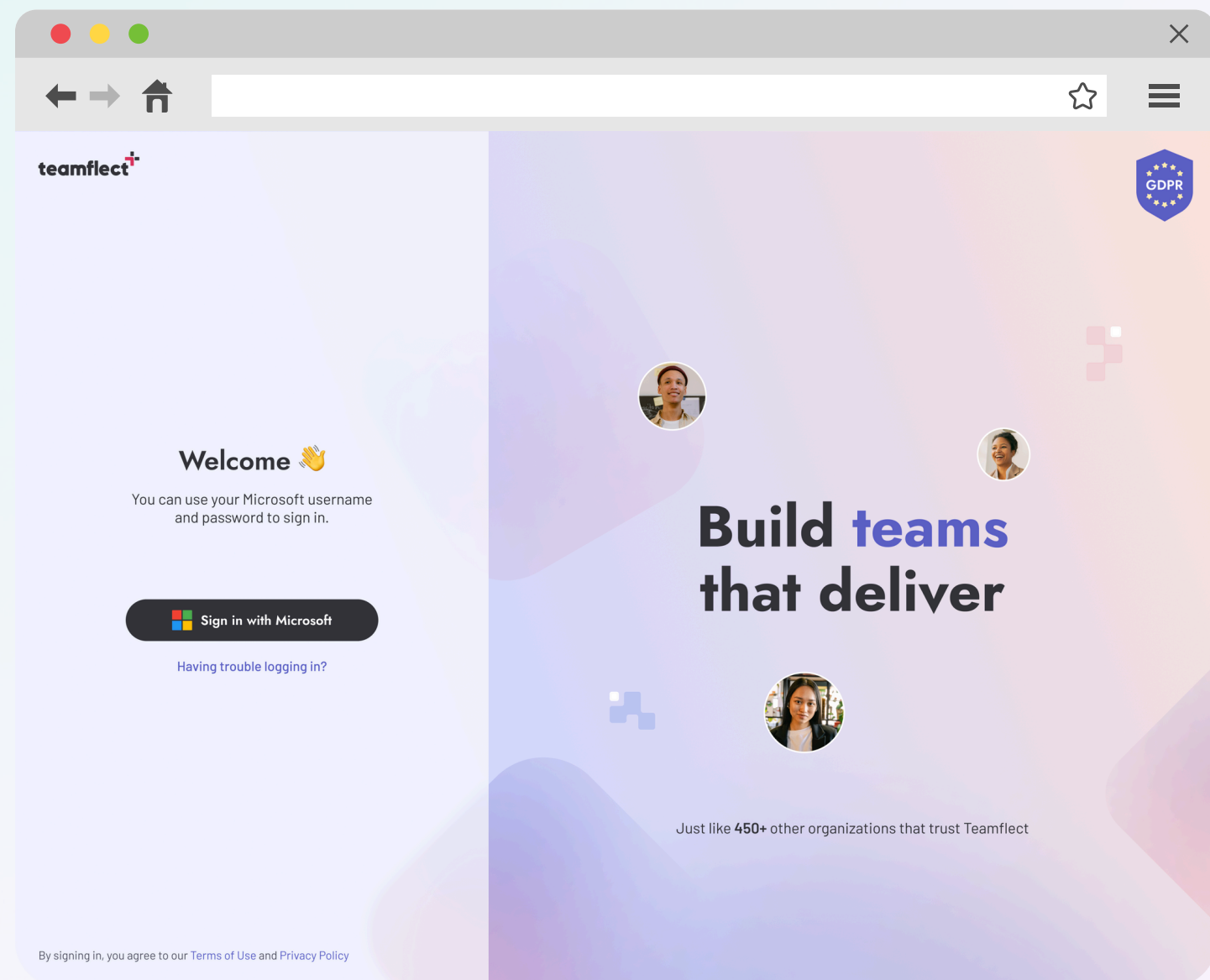
Explore

Discover powerful features designed to streamline feedback, goal tracking, and team collaboration.

Engage

Connect with your team and inspire growth through continuous engagement and actionable insights.
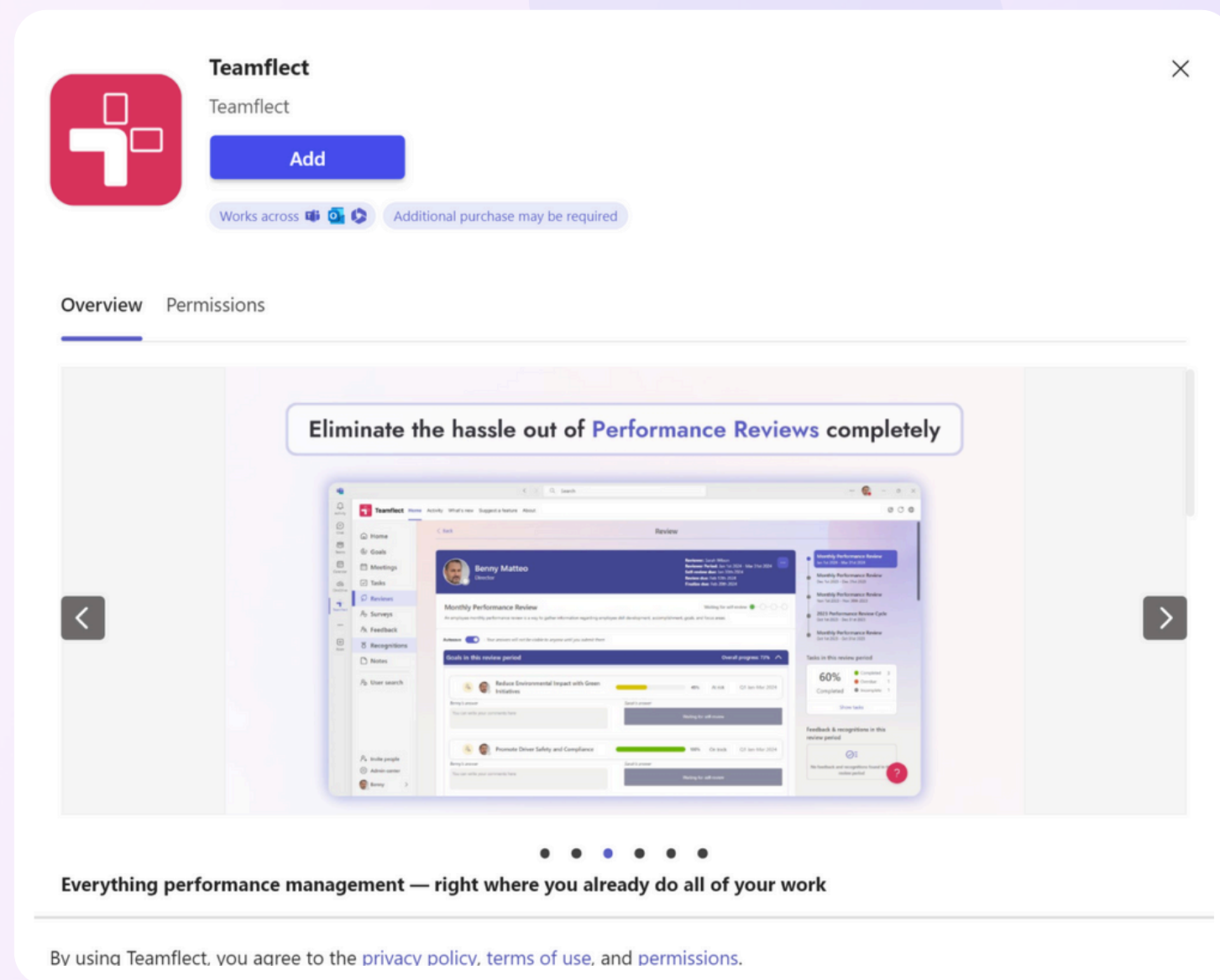
How can I use Teamflect?

Note:

You don't need to create a separate username and password because Teamflect uses a single sign-on for authentication.

Option 1: Web Browser

- Simply open your favorite browser
- Visit https://app.teamflect.com.
- Log in using your Microsoft credentials—the username and password that you use to log in to MS Teams.

Option 2: MS Teams App Store

- Open the Microsoft Teams app.
- Click the "Apps" button on the left rail.
- In the search bar, type Teamflect.
- Once you find Teamflect, click "Add" to integrate it into your Teams workspace.

Explore "What's New" to discover the latest updates and exciting new features that will elevate your Teamflect experience.

Got a great idea? Head to "Suggest a Feature" to share your vision and help shape the future of Teamflect!

Access your My Profile and My Settings by clicking on your profile photo. In My Profile, you can view your user information, while My Settings allows you to manage your notification preferences and general settings.

Click the module buttons here to navigate to the desired Teamflect module.

Easily find the person you're looking for with the search tool.

Clicking your profile opens a menu with 7 options: Demo mode, What's new, Suggest a feature, Support, Help center, Impersonate, and Settings & Profile.

Access your most-used modules directly from the dashboard tab—perfect for quick and efficient navigation.

Easily connect with your manager and direct reports all in one place.

Teamflect

Home   Activity   What's new   Suggest a feature

- Home
- Goals
- Meetings
- Tasks
- Reviews
- Survey
- Feedback
- Recognitions
- Notes

User Search

Upgrade Now

Invite People

Reports

Adele

Hello, Adele Vance 👋

Me   My People

My upcoming meetings

Adele-Mariam 1-1 meeting
Nov 10th 2023, 2:00 PM - 3:00 PM
This meeting has 0 talking points

Montly Team Check-In
Nov 10th 2023, 5:00 PM - 5:30 PM   +3
This meeting has 0 talking points

Weekly with Managers
Nov 10th 2023, 5:00 PM - 5:30 PM
This meeting has 0 talking points

View All →

My latest recognition

Miriam Graham sent a recognition to Adele Vance.

High Energy   8 pt

"Your efforts have greatly contributed to our success..."

👍 0   ❤️ 1   Nov 3rd 2023

View All →

My active goals 37   + New Goal

Launch at least four successful promot...	10%
Complete 10K sales	0%
Increase sales from 300K to 500K	23%
Work on my presentation skills	50%
Increase sales by 10%	0%
Reduce employee turnover	0%
Increase sales by 10%	0%

33%
Overall Progress

No Status	22
On Track	14
At Risk	1
Off Track	0
Closed	0

View All →

My tasks 126   + New Task

| Test | 27th Dec |
Send XYZ customer report to...	28th Sep
Complete FRM project presentation	28th Sep
Complete the files	15th Sep
Complete FRM recruitment ppt	11th Sep
Complete the excel file	26th Oct
Complete the files	28th Sep

5%
Overall Progress

Incomplete	22
Overdue	14
Completed before due	3

View All →

How can I invite and search for people in Teamflect?
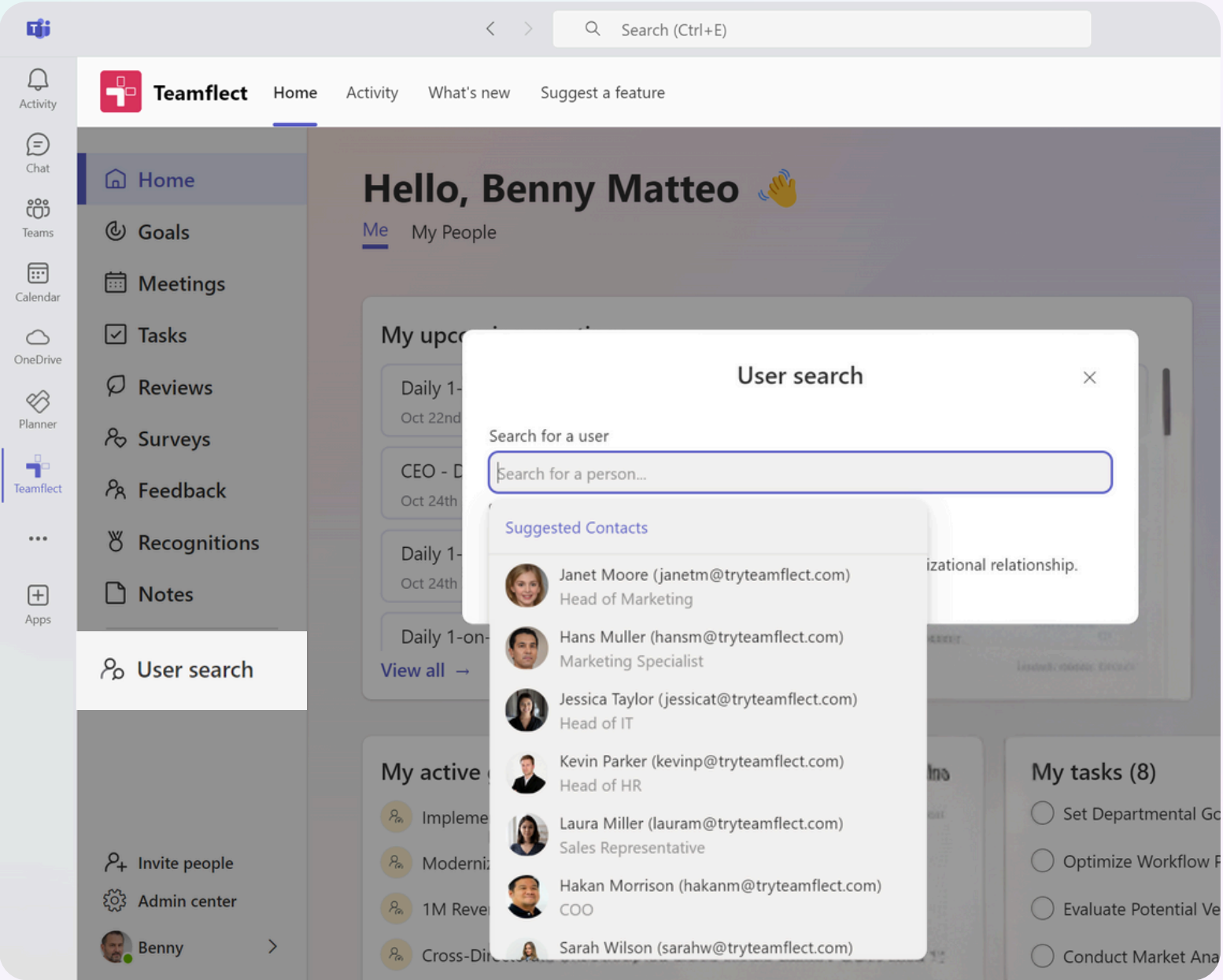
User Search:

By using the User Search button, you can quickly search for individuals within your organization. Once found, you can easily access their profiles to view their information, feedback, and more.
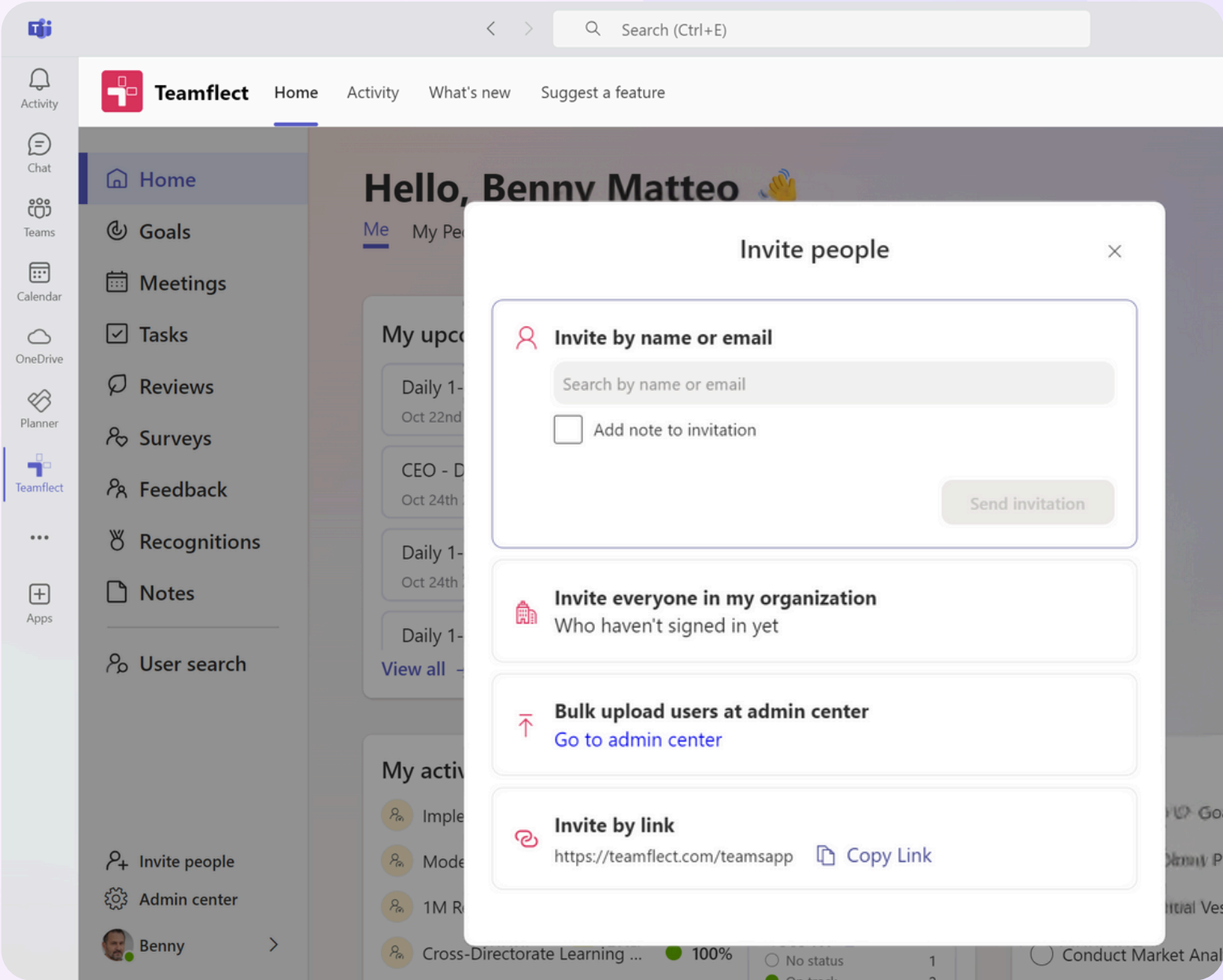
Invite People:

With the Invite People button, simply enter the name of the person you want to invite in the "Search for users" section, and you can even add a personal note. For larger groups, you can bulk upload users through the Admin Center or share an invitation via a sharable link.

# How do I access my "User Profile" and "My Settings" in Teamflect?

Click on your name and profile picture at the bottom right of your Teamflect app, then select the **Settings & Profile** section.
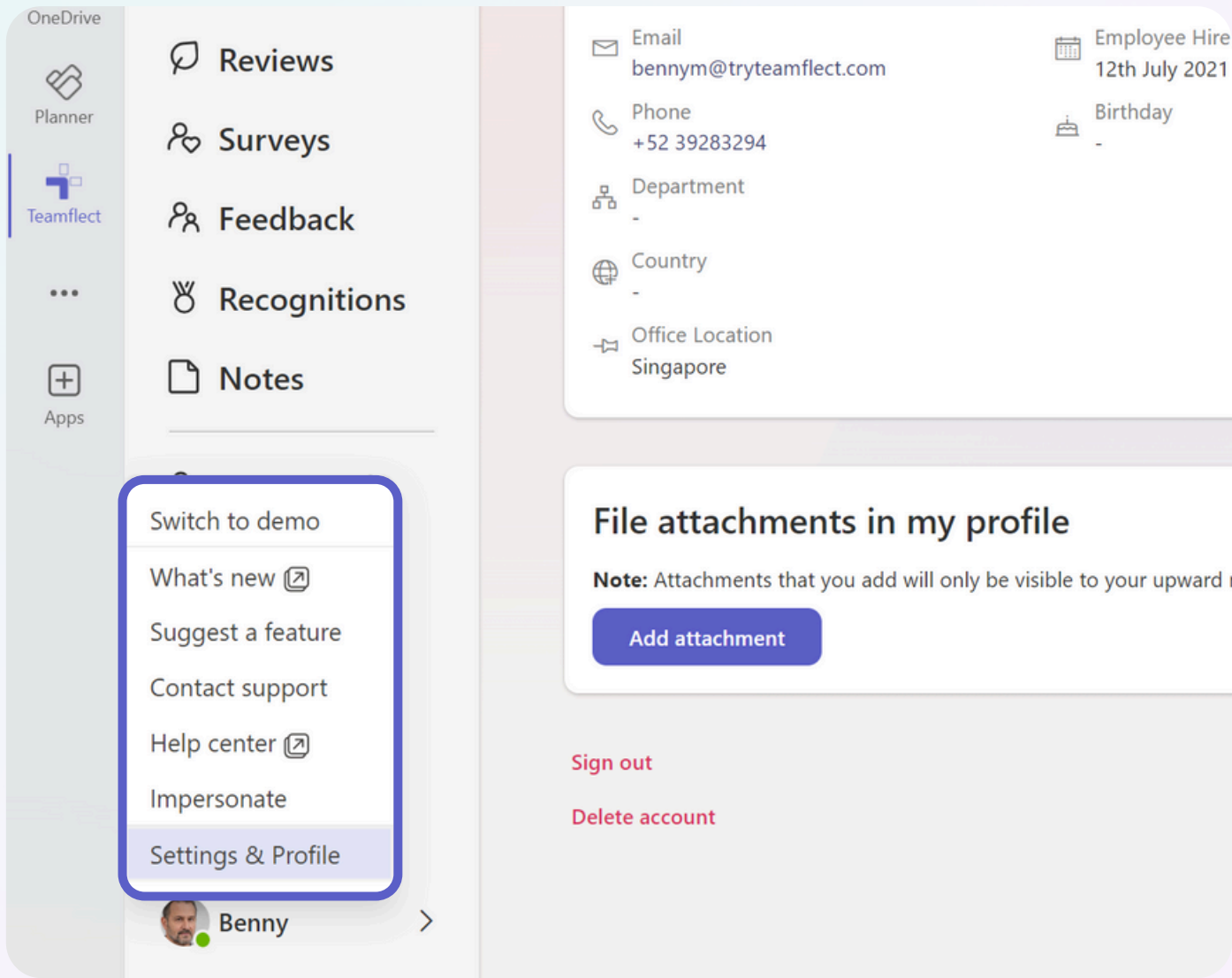
My Profile:

The My Profile tab lets you view and update key information:
- Profile Information: Access and update your name, contact details, job title, and email for accurate communication.
- Role Information: See your assigned roles and permissions to understand your responsibilities.
- File Attachments: Add images, reports, or other documents to your profile for easy reference.
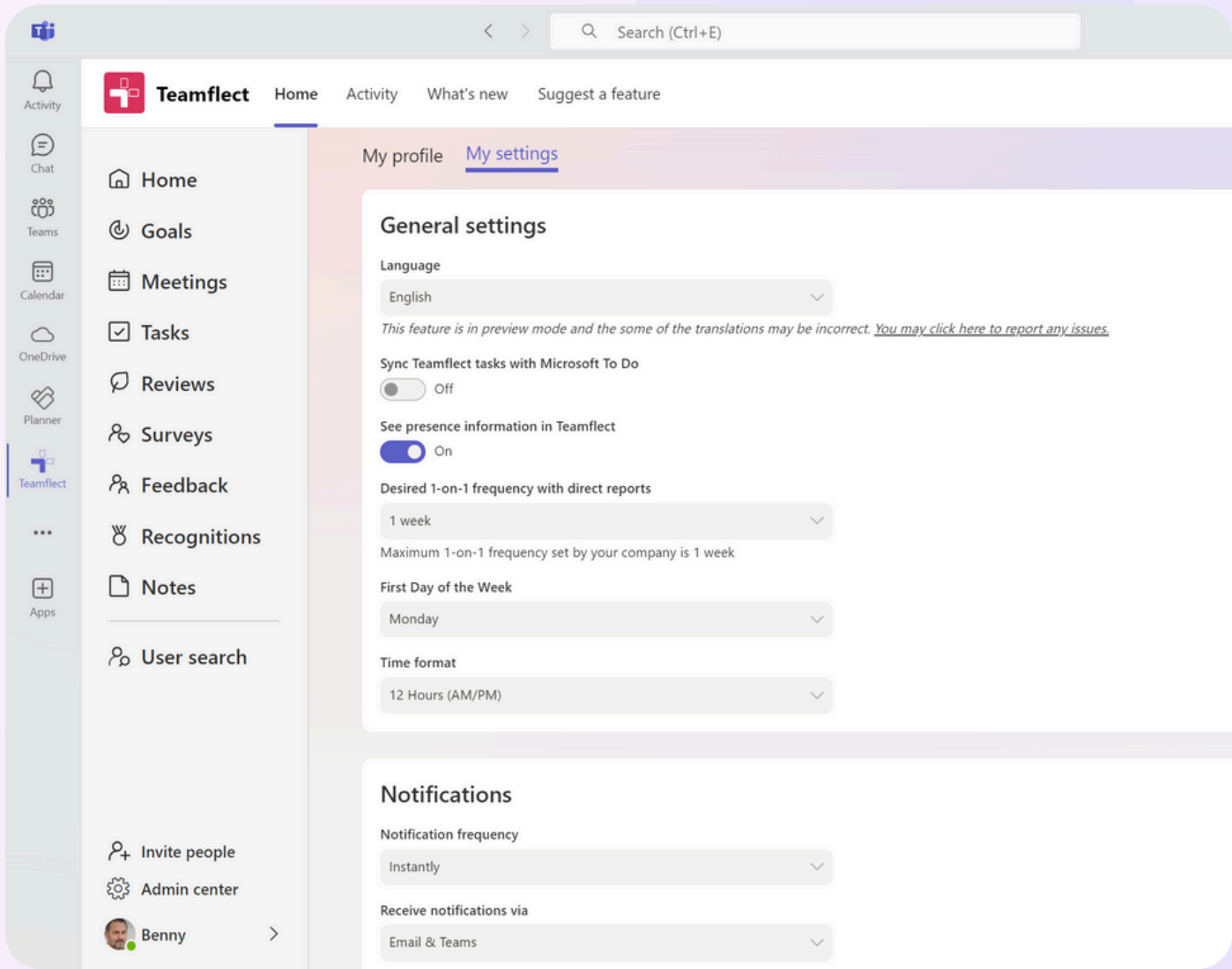
My Settings:

The My Settings tab allows you to manage settings based on your preferences:
- General Settings: Customize language preferences, adjust the frequency of 1:1s, and set your preferred date and time format.
- Notification Settings: Control how you receive notifications, choosing which modules or specific alerts suit your workflow.
- Teamflect Administrators: Identify and contact administrators managing your company's account for clear communication and support.

How Can I Add Teamflect to Teams Meetings? ▦
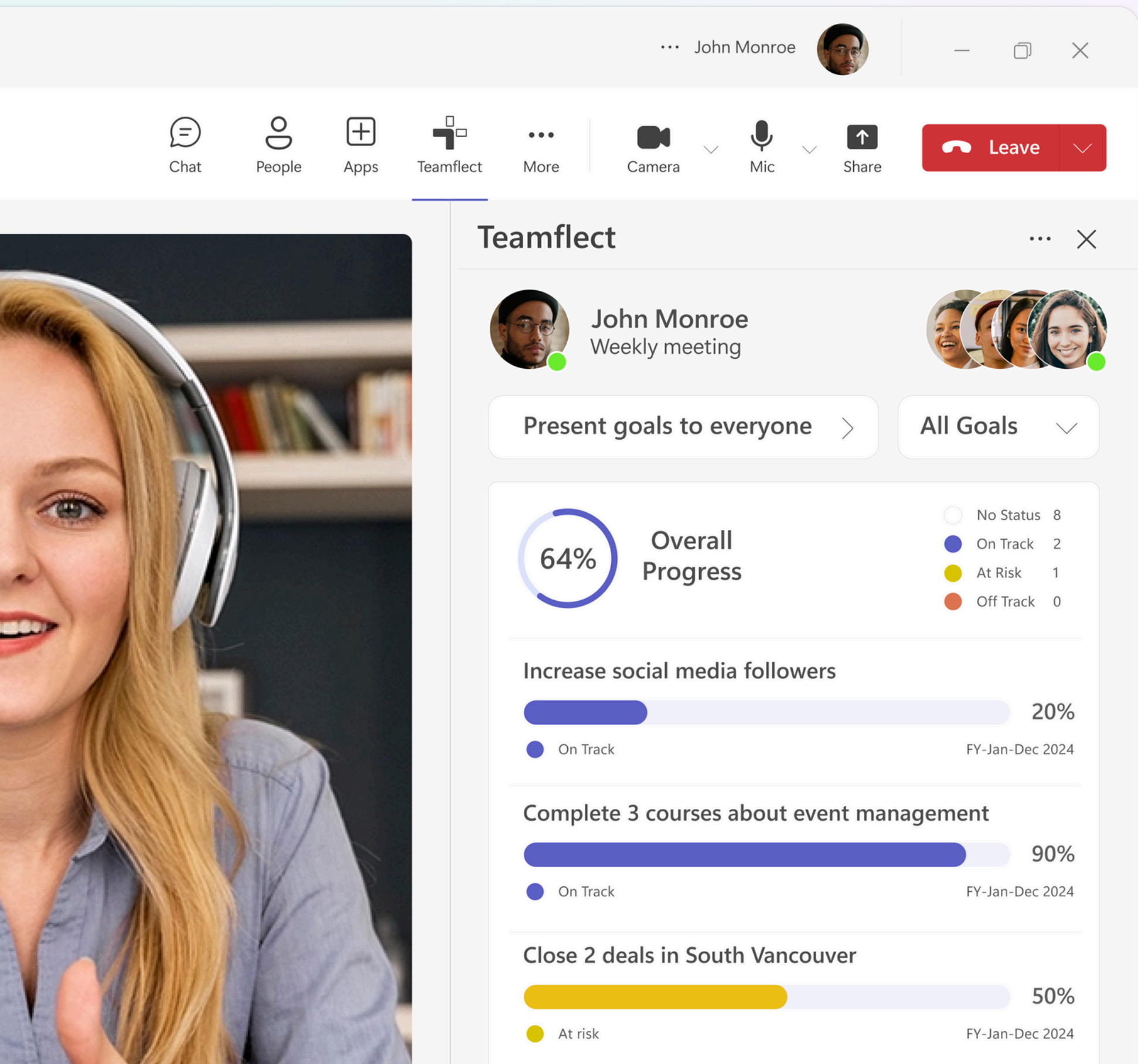
Using Teamflect in a Teams Meeting

Once you're in a Microsoft Teams meeting, follow these steps to integrate and use Teamflect:

Add Teamflect:
- In the "Apps" section at the top of the Microsoft Teams meeting interface, search for "Teamflect" and select it to add.
- After adding, click the Teamflect logo within the meeting interface. It will open in a panel on the right-hand side.

In the panel, you can view the agenda and talking points, take shared or private notes, add tasks, and present employee goals and performance reviews.

Does Teamflect have a mobile app?
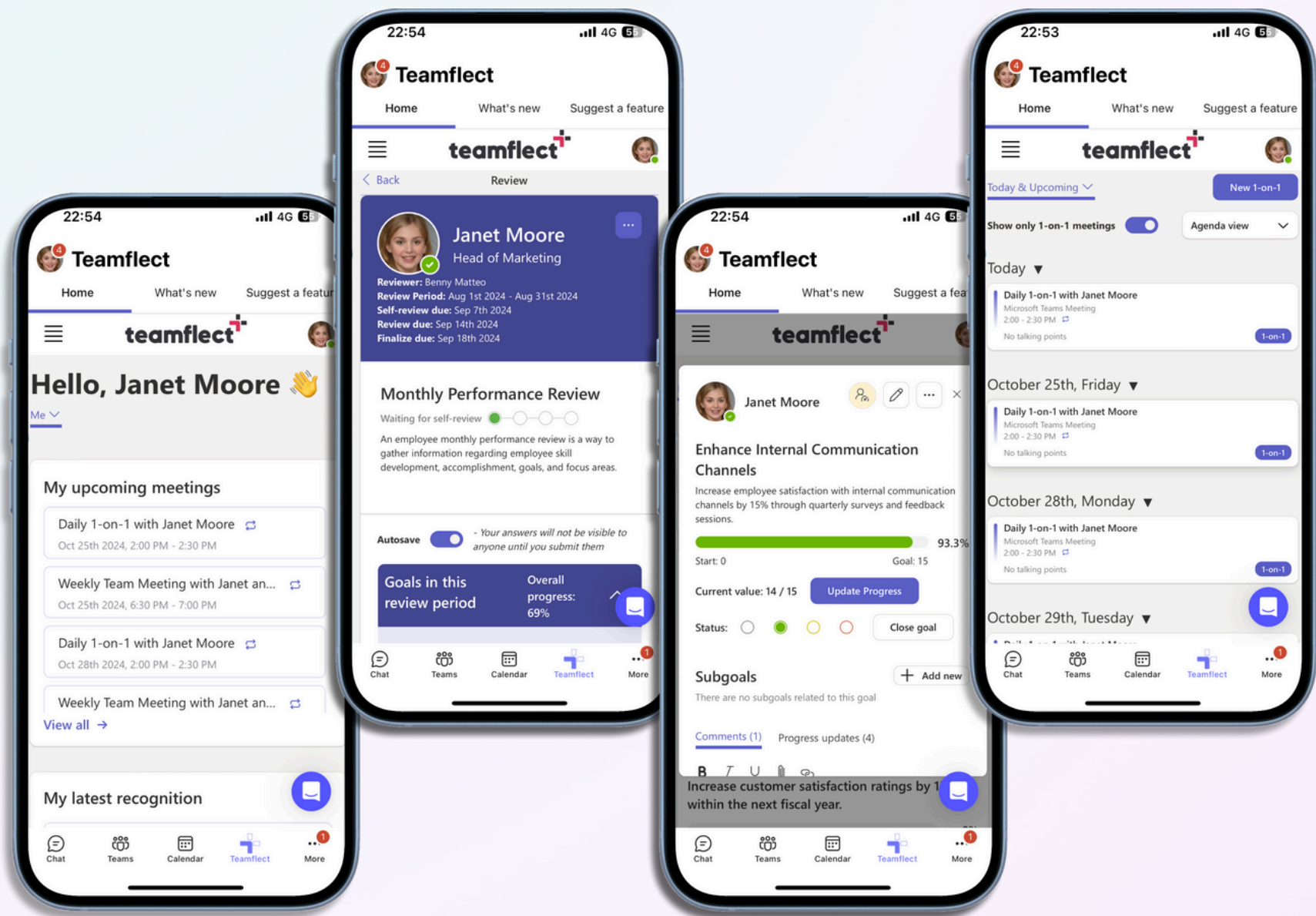
Accessing Teamflect on Mobile

You can access Teamflect on mobile devices through two convenient methods:

Option 1: Microsoft Teams App
Download the Microsoft Teams mobile app and add Teamflect to your navigation bar for quick and easy access. This allows you to enjoy all Teamflect features seamlessly within the Teams app on your mobile device.

Option 2: Mobile Browser
Alternatively, open app.teamflect.com in your mobile device's browser, log in with your credentials, and start using Teamflect without any additional downloads.
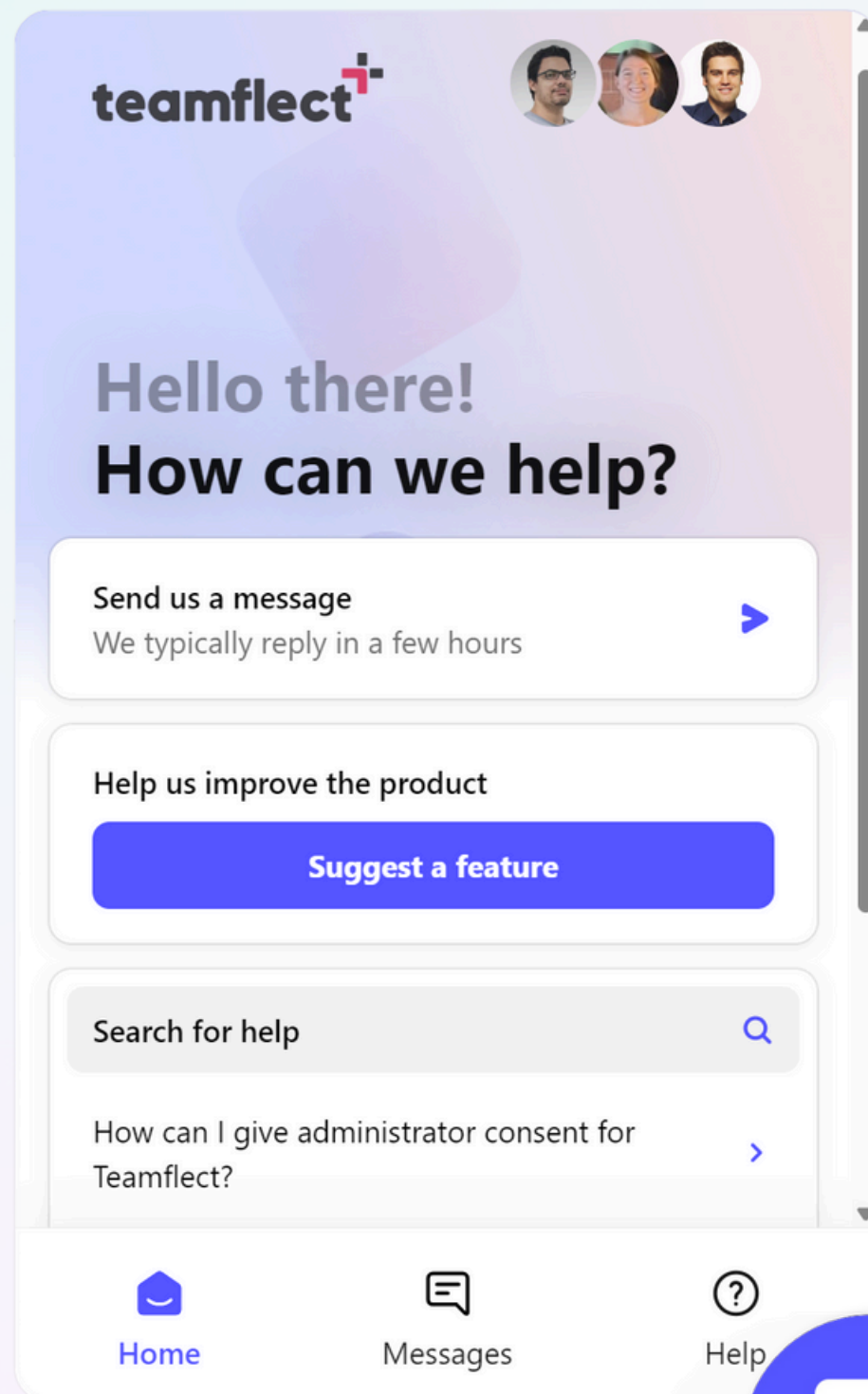
Need Help with Teamflect?

To get support, open the Help Menu by clicking the "Bubble" icon at the bottom right:

- **Search for Help:** Browse our help articles for common solutions.
- **Help Us Improve the Product:** Share feedback or suggest improvements.
- **Send Us a Message:** If you need further assistance, choose this to chat with our team or create a ticket. In the pop-up, select "I want to report an issue" for specific problems or "I have another question" for general inquiries.

How Can I Access the Teamflect Help Center?

teamflect

🌐 English ⌄

How can we help?

🔍 Search for articles...

Frequently Asked Questions / Basics
By Livia and 2 others • 75 articles

Modules
By Livia and 2 others • 232 articles

Videos
sabella and 1 other • 37 articles

User Management
By Livia and 1 other • 21 articles

Switch to demo
What's new ↗
Suggest a feature
Contact support
Help center ↗
Impersonate
Settings & Profile

Data Management
ivia and 1 other • 3 articles

Subscription Management
By Livia • 9 articles

Access Resources in the Teamflect Help Center

To access the Teamflect Help Center, click on your profile picture and select Help Center from the menu.

You'll find a variety of resources to support you, including:
- **Detailed help articles** covering each module
- **Tutorial videos** for step-by-step guidance
- **Rollout and adoption materials** to help integrate Teamflect smoothly
- **Best practices and tips** to maximize effectiveness
- **FAQs and troubleshooting guides** for common issues

teamflect +

Curious about just how big of a difference Teamflect can make in your performance management process?

Try Teamflect | **Schedule a Demo**

✉ info@teamflect.com 📞 +1 (323) 591 84 19

AMWINS™ MEYER WERFT PAPENBURG 1795 ⬤ RIMAC Schréder Experts in lightability™ ⬤ Grant Thornton

M Montego —Pet Nutrition— GAS SOUTH INVACARE CCI ⧉ CIRQUE DU SOLEIL.

🏠 Home

⏱ Goals

📅 Meetings

☑ Tasks

💬 Reviews

👥 Survey

👤 Feedback

✌ Recognitions

📄 Notes

👥 User Search

💎 Upgrade Now

👤 Invite People

📊 Reports

👤 Adele

Hello, Adele Vance 👋

Me   My People

My upcoming meetings

Adele-Mariam 1-1 meeting 🔁
Nov 10th 2023, 2:00 PM - 3:00 PM

Montly Team Check-In 🔁
Nov 10th 2023, 5:00 PM - 5:30 PM

Weekly with Managers 🔁
Nov 10th 2023, 5:00 PM - 5:30 PM

View All →

My active goals 37

+ New Goa

Launch at least four successful promot...   10%

Complete 10K sales   0%

Increase sales from 300K to 500K   23%

Work on my presentation skills   50%

Increase sales by 10%   0%

Reduce employee turnover   0%

Increase sales by 10%   0%

View All →

33%

Overall Progress

No Status   22
On Track   14
At Risk   1
Off Track   0
Closed   0