



# Desk FAQs (CBA)

Aug 16, 2020

Find answers to the most frequently asked questions about Desk and Desk intranet. If your question isn't located here - tell us about it in the suggestion box at the bottom of the page so we can add it to our FAQs.

## ① How do I see a full list of my apps and descriptions? ▼

Click on your picture (in a circle) in the top right corner of the page. Then click settings from the menu that extends below it. You'll be taken to the application settings page where you can see a full list of available applications and their descriptions. You can also control whether they will display in the application menu in the top navigation bar - it's represented as a set of 9 boxes (3 by 3).

## ① Do the apps have categories? ▼

If accessing applications in from the top navigation bar, clicking on the icon that looks like 9 boxes (3 by 3) - will open a list organized by groups including productivity, marketing, finance and education. We'll also show your most recently opened applications first, so your favorites float to the top.

## ① Can I customize my apps? ▼

Yes, you can completely customize the apps you have available on your Desk homepage. You can move the app cards around and place in any order you like, you can add apps (click Add Apps) or remove the ones you don't use regularly (you can always add them back later).

## ① How do I add or remove an app? ▼

On the Desk homepage, just above the list of apps you'll see a plus sign and label "Add App". Click it and select any apps you'd like to add to your homepage. You'll know they're selected if they have a blue outline. When you're done, click the blue add button towards the bottom right of the popup. You can also access the popup from the last app card on your homepage, you'll see a big plus symbol where the icon would otherwise be.

## ① What are the links at the bottom of app cards? ▼

For some apps, their cards will have direct links to specific app features to help you get where you need to go faster. Sometimes, you might see 3 vertical dots in the bottom right corner of an app card. If you click it, you will be able to access additional links to jump straight to specific parts of the corresponding app.

## ① Can I access my apps outside of Desk? ▼

In some apps, if you look towards the top right corner of the page, there is a button that looks like a grid of 9 boxes 3 by 3 We call it the waffle If you click on it you'll be able to jump from app to app.

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② **Will the app filter be removed now that search is available?** ▼

Eventually, we'll be moving towards a unified and comprehensive search. We plan on improvements to app filtering and sorting that you'll see in the future.

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② **Will my Desk App Dashboard change now that there is an intranet?** ▼

No, your application dashboard will stay the same and you will be able to access it from the "Desk" option in the left-navigation menu at any time. You can also access any of your apps by clicking on the App Menu (waffle icon) on the top-navigation bar as usual.

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② **How do I add a favorite in Desk?** ▼

Yes, you can favorite internal documents within Desk as well as adding an external bookmark to Desk. Follow these simple instructions to get started.

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② **What is the Help Center?** ▼

The Help Center has information on the apps you use to support your business, along with general training and support materials that allow you to quickly find answers without the need to call support or file a ticket.

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② **How can I access the Help Center?** ▼

Your Help Center access is still on the top-navigation but you will notice we have changed the icon to a "?" for better recognition. You can also access the Help Center by clicking on any of the the "Help Center" links located in the app cards to get specific information on that product or program

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② **How is the Help Center organized?** ▼

Most content on the Help Center is organized by application. We also have a section on Guides and Resources that has more general training information. Each application will have its own set of Help Center articles and often its own set of Frequently Asked Questions.

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② **Does the Help Center have any new materials?** ▼

Yes, we have created a "Guides and Resources" section full of support materials and it will continue to grow.

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② **What is in notifications?** ▼

Typically, major announcements like product launches and events will show up in your notifications. In the future, we hope to be adding notifications for events that require action on your part or save the date notices. Stay tuned!

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② **What can I find in my profile?** ▼

Currently, your profile page contains your name, office name and address, title, phone number, e-mail address and license number if applicable. This information comes from Dash.

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② **Why can't I edit my profile?** ▼

The profile information on this page currently lives in Dash. Please contact your office manager to update this information. This information is not synced to any other products at this time.

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② **How can I see my profile?** ▼

If clicking on your image in the top right corner of any page, click My Profile in the menu that opens. You'll be taken to your profile page.

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② **What if I see outdated or incorrect information in my profile?** ▼

If you see anything wrong with your profile, please reach out to your office manager so they can ensure it's resolved in Dash.

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② **How does Search work?** ▼

To make things easier and familiar, Desk Intranet search has been modeled after Google search. To search the contents within Desk:

- Click the magnifying glass near the top right of the page to open the search bar
- Optionally, select a filter (see next question on filter options) and tap again to close
- Type in a keyword, title or term you are searching for and click return
- Your search result page will open with all the matches (or near matches) to the keyword, title or term you entered

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② **Can I narrow my search? Can it be filtered?** ▼

Yes, you can narrow your search by using our filter options:

- Click the magnifying glass to open the search bar
- Choices will appear that allow you to narrow your results to those options
- Everything: there is no limit to your search or the results - you are searching everything in the site
- Apps: your query will only show results related to our apps; If you are searching for a specific app or what an app does, this would be the best filter
- Help Center: your query will only show results related to our Help Center materials

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### ② What if my search doesn't return any results? ▼

If no results are found, you will receive a message that ask you to try again by checking your spelling, try different words, try more general keywords or by selecting one of the auto-suggestions provided as you type.

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### ② How are searches displayed? ▼

Results are sorted by relevance according to the terms you have searched, bringing to the top of the list identical matches. Each search result will also show "chips" with associated keywords for that specific search which will be bolded if they identically match your search criteria. You will also be able to identify the type of document each search result has.

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### ② Why did search ask me "did you mean"? ▼

This functionality is there to help you narrow your search by providing the most used word that may fit your search

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### ② Does search have an auto-suggestion option? ▼

Yes, as soon as you start typing all relevant matches will display for you to select and auto-complete.

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### ② Does search have an auto-fill option? ▼

Yes, as soon as you start typing it will provide optional words for you to select (you must have typed at least 3 letters for the process to begin)

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### ② What does the News section contain? ▼

The News section will include all Coldwell Banker brand news in one convenient location so you can catch up.

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❓ **How are the tags used?** ▼

The tags represent categories of content, so you have a better idea what a piece of news relates to. In the future, you'll be able to filter by tags, so you can limit your news by subject.

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❓ **How do I like the News content?** ▼

If you scroll down to the bottom of any news article, there's a thumbs up icon. Click it to let us know you liked the content. It helps us get a better idea of the kinds of content you appreciate, so over time, we can bring you more of the news that matters most.

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❓ **What if I find a mistake or want to make a suggestion for a News article?** ▼

If you find an issue with a specific article, scroll down to the bottom of the article page. You'll see a chat bubble icon just beside the thumbs up. When you click the chat bubble, there will be a set of checkboxes so you can indicate whether the content is inaccurate, outdated or more. You can also leave notes in the text box. Be sure to hit send when you're done.

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❓ **What is CB Briefs?** ▼

CB Briefs is the new Coldwell Banker Brand news section available in Desk. You will also receive a daily or weekly digest with all of the latest communications to keep you up-to-speed.

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❓ **How do I watch a video in the News section?** ▼

If you see an article in news with a play button on top of the image, it's a video. Click through to the article, and click anywhere on the video on the page. In most cases, videos come from Youtube, so you'd be able to use features such as Watch Later or view in fullscreen.

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❓ **How do I see the full news article?** ▼

Clicking anywhere on a news card's image, title or description text will take you straight to the full article.

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❓ **Will I receive an email with all the latest News?**

Yes, you are automatically signed up for daily notification emails. The default email schedule is daily at noon. There's also the option for a weekly digest (Friday's at noon ET). Email delivery adjustments can be made in the Desk "Settings" section.

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❓ **When should I use search vs the left-hand side navigation to look for specific materials?** ▼

You can access all content either by search or locating them through our user-friendly left-hand navigation menu. Choose the option that best suits your needs. And don't worry, thanks to input from agents across our company,

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**② How do I know how much content each section has?** ▼

To make things easier for you, whenever you click on a top level section all subsections will display so that you can easily narrow your search and spot where to look for your specific material

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**② How can I switch from one section to the other?** ▼

Your side navigation menu is fixed so no matter where you go within Desk you can still see where you are and easily switch between sections in one click. Breadcrumbs will also display at the top of your page so that you can go back to the previous sections you have been through at any time.

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**② Is there a link to the local MLS anywhere?** ▼

Not yet, but soon, we'll have a favorites feature where you can add links to your favorite sites, in or outside of Desk. We plan on preloading everyone's local MLS when the feature launches. You'll know it when you see a heart show up in the top menu bar.

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**② How do the breadcrumbs at the top of each page work?** ▼

Breadcrumbs will show your navigation history, so it's easy to jump back to previous pages. Since some of our content is linked to from multiple places, we wanted to ensure you had a way to see how you got somewhere. Clicking on any blue links in the breadcrumb will take you to that page. The last item in black reflects the current page you're on.

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**② Is Desk Intranet mobile-friendly?** ▼

Yes, Desk is built to be a truly mobile experience on all devices.

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**② Can I find Desk in the Apple App store or Google Play?** ▼

Not yet, but this is in our long-term vision planning.

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**② Does Desk replace CB Exchange?** ▼

Yes, Desk will replace CB Exchange. CB Exchange will be retired by end-of-year 2020. Date TBD but look for communication and additional detail about this change in the near future.

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**② Will my local intranet still be available?** ▼

② **Will I be able to see materials from across the company or just my own?** ▼

You will still see your local content and any national pieces that are available to Coldwell Banker. The experience should be the same CB Exchange just reimaged and simplified for a more user-friendly experience.

② **Will materials be updated periodically?** ▼

Yes, our goal is to provide only current and relevant materials so you can be confident that the resources available are correct.

② **What happens if I find something outdated?** ▼

If you find outdated content, scroll down to the bottom of the article page. You'll see a bubble icon just beside the thumbs up. When you click the bubble, select the checkbox that says "It seems outdated, incorrect or incomplete". You can also leave notes in the text box if you have more detail. Be sure to hit send when you're done.

② **How do I provide suggestions?** ▼

If you have suggestions about specific articles. Click on the bubble icon at the bottom of an article page, select any relevant checkboxes, leave notes in the text box and hit send. If you have suggestions about Desk in general, click the feedback button hugging the right side of the screen and follow the on-screen instructions.

② **Why should I "like" something?** ▼

The more we understand what matters to you, the better job we can do of getting you valuable content that makes a difference in your business. It also helps us to cut out the clutter and focus on what's meaningful.

② **Are the content and materials print-friendly?** ▼

Yes, all materials throughout Desk are print-friendly so feel free to print or create a PDF download.

② **What materials will I see within the CB Brand section?** ▼

The CB Brand landing page houses Coldwell Banker information like brand events, programs, store, COVID info and more.

② **What materials will I see within the My Business section?** ▼

Within My Business you can access all materials related to Buyers & Sellers, all forms in one place and your educational resources.

② **Is it true that I can find all my forms in one spot?**



Yes, another request from our agent research was to make it easy by putting all forms in one location. Don't worry, we have them categorized so that you can easily find the form you need. And don't forget, you can always search for specific forms.

② **What materials will I see within the Marketing section?**



The Marketing section provide a spotlight on our DIY and professional/white glove services available to help promote yourself and your business. You can find Awards criteria, access all materials related to Advertising, Prospecting, PR, Social Media and Global Luxury.

② **Where do I find images and social media assets? I don't see them on Desk.**



All social media assets are available in [BrandSrv](#).

② **What materials will I see within the Business Advantage section?**



Within the Business Advantage section you will be able to access all of your company discounts and services.

② **How do I sort these tables to find what I am looking for?**



We've added the ability to sort so you can easily find the reports you need. You can currently sort by Title, Updated, and Type. The ability to sort by category will be available soon after launch.

② **Will Desk Intranet continue to evolve?**



Yes, we have a lot of exciting changes in our future roadmap:

- Company Directory: easily find and contact other CB agents and employees without ever leaving Desk
- Performance (Awards): Agent and Team award and performance details
- Content subscription: Be alerted if content is added or changed within the site (based on your subscription)
- Enhanced search filtering and tags
- Profile Management: Update profile, contact information and more for multiple apps in one handy place