

A complete guide on:

How to zipBoard

For Guest reviewers, clients and stakeholders.



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What is zipBoard?

[zipBoard](#) is a web-based visual annotation, bug tracking and feedback tool.

What can a guest reviewer/client/stakeholder do with zipBoard?

zipBoard helps you to:

- Give visual reviews and feedback
- Get feedback and review from stakeholders, clients and external reviewers
- Communicate within the team and also with the stakeholders and clients

..., all in one place.

Let's get you started in no time.

What are the prerequisites to use zipBoard?

Just install our [web extension](#) on your browser and you are done. It's that easy. If you have not installed the extension, you will be prompted to do so once you start using zipBoard.

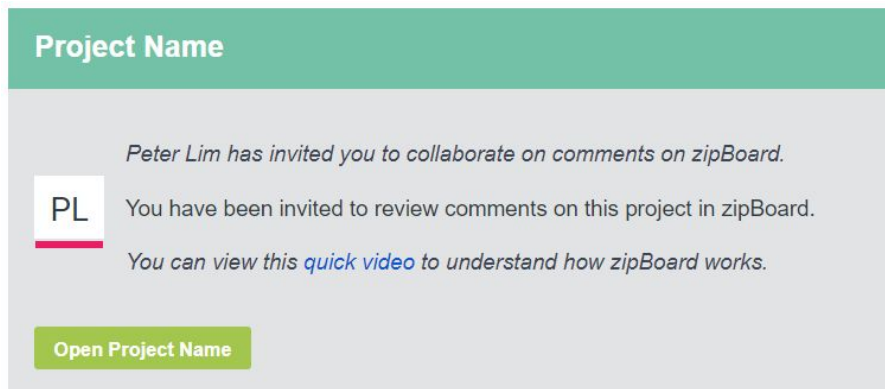
For the best experience, we recommend [Google Chrome](#).

Do I need to log in?

The answer is “it depends”. When you are invited (via link or email) to review a project or certain contents thereof, the Owner/Admin of the project has the authority to set permission on whether or not you need to log in.

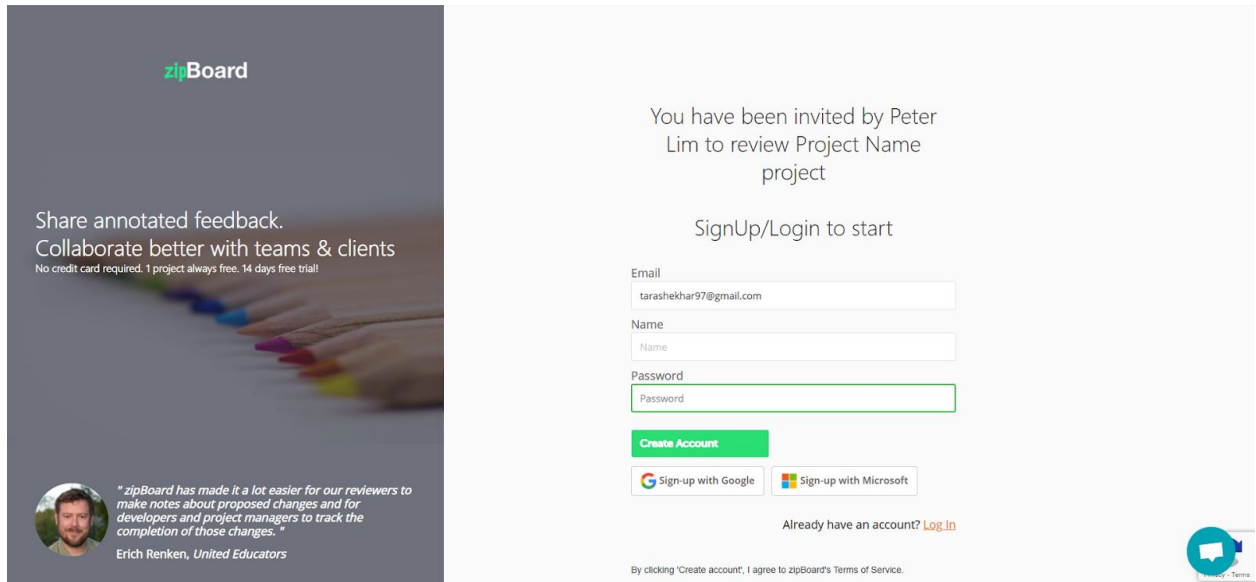
Invited via email to review a project

- When you are invited via [email](#) to review a project, you will receive an [email similar](#) to the one below.



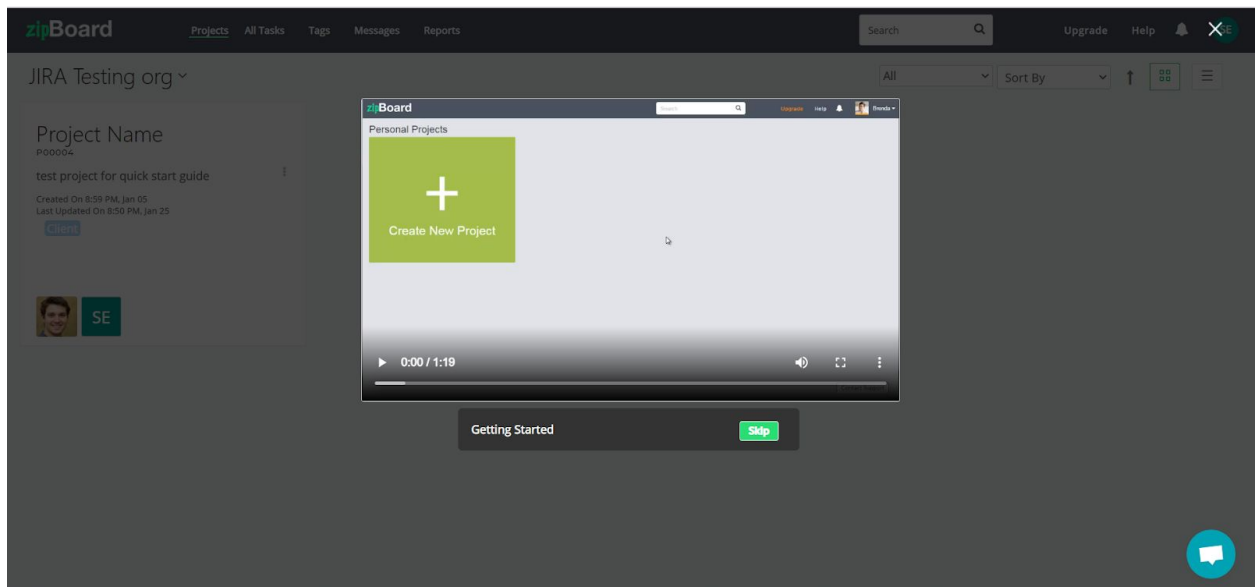
- If you click on “Open {{Project Name}}”, you will be redirected to a page where you will be requested to log on to zipBoard. Add your name and a password and click on “[Create](#)”

Account”.

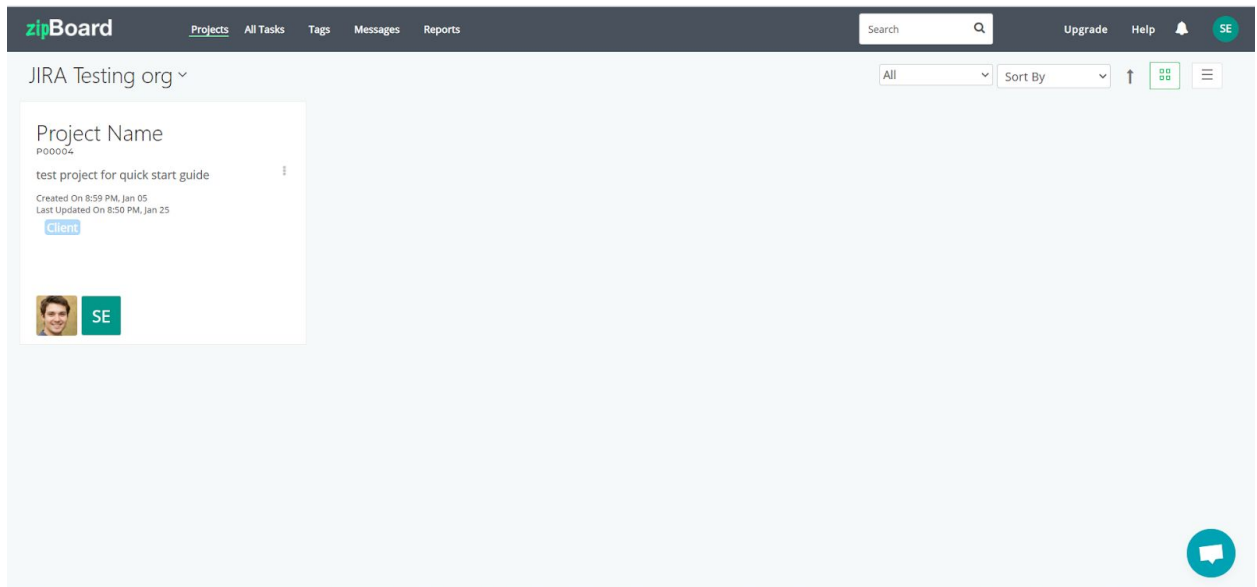


The image shows the zipBoard account creation and login interface. On the left, a promotional banner for zipBoard features the text "Share annotated feedback. Collaborate better with teams & clients" and a testimonial from Erich Renken of United Educators. On the right, a message states "You have been invited by Peter Lim to review Project Name project". Below this, a "SignUp/Login to start" section contains input fields for Email (pre-filled with tarashekhar97@gmail.com), Name, and Password. There are buttons for "Create Account", "Sign-up with Google", and "Sign-up with Microsoft". A link for "Already have an account? Log In" is also present. At the bottom, a small disclaimer states "By clicking 'Create account', I agree to zipBoard's Terms of Service."

- After you successfully [log in](#), you will see a prompt on your screen where you will be able to watch an introductory video. You can watch it, which we recommend, or skip it.



- Then, you will be able to see the project to which you are invited to. Click on the [project](#) to view what's in it.

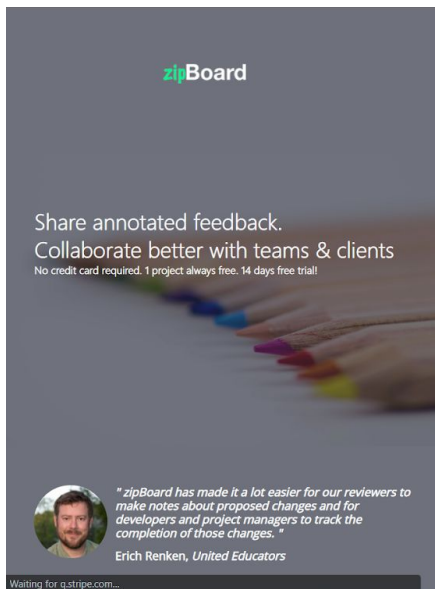


Invited via link to review a project

The Owner/Admin can also send you a link to the project directly that you can use to review the project and all the files in it.

- You will receive an invite link which appears like:
<https://app.zipboard.co/invitecollab/KBtNpbye28a4yM6wr>

- You will be redirected to the [log in](#) page and you will have to [Create Account](#). (for next steps, see “Invited via email to review a project”).)



Get Started with a free zipBoard account

Email

Name

Password

Create Account

Sign-up with Google

Sign-up with Microsoft

Already have an account? [Log in](#)

By clicking 'Create account', I agree to zipBoard's Terms of Service.

Invited via email to review a particular file

An Owner/Admin can also invite a [reviewer](#) specifically to a particular file via email. In this case you will have to create an account in zipBoard and proceed further.
 (see “Invited via email to review a project”)

Invited via link to review a particular file

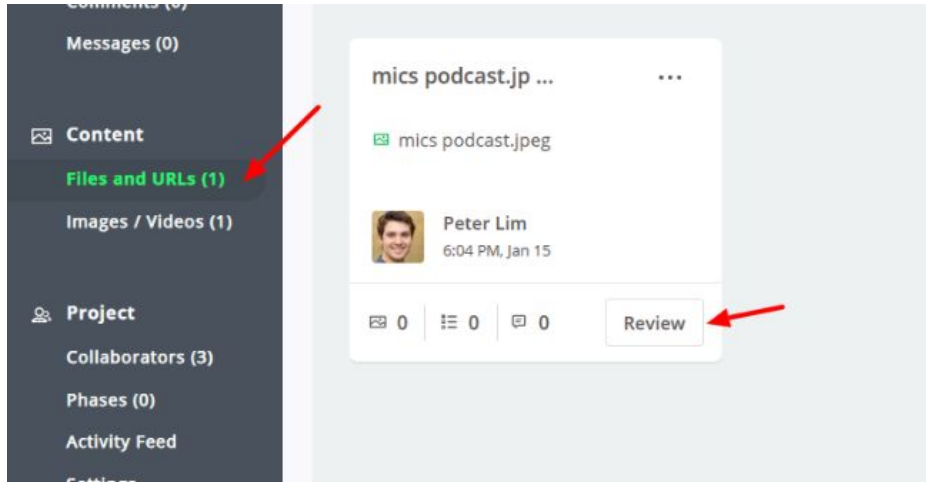
An Owner/Admin can also invite a [reviewer](#) specifically to a particular file via email. In this case, depending on the rights set by the Owner/Admin, you may or may not have to log in to an account.

- The shared link will appear as: <https://app.zipboard.co/s/8xjEa>
- If you are prompted to login, see “Invited via email to review a project”.
- If you are not, you will be directly redirected to a page where you can directly review the content, after entering your details.

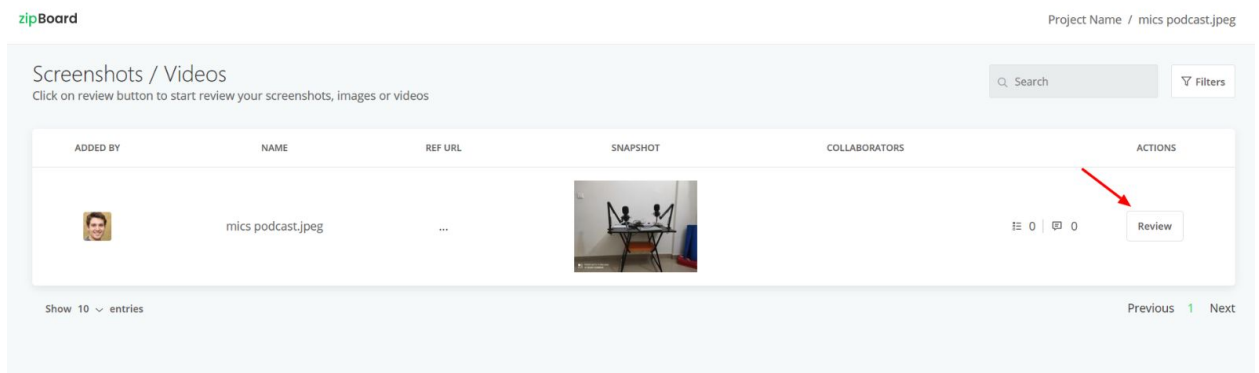
- After entering your name and email address, you can review the content directly. (see examples below)

How to review an Image? (example 1)

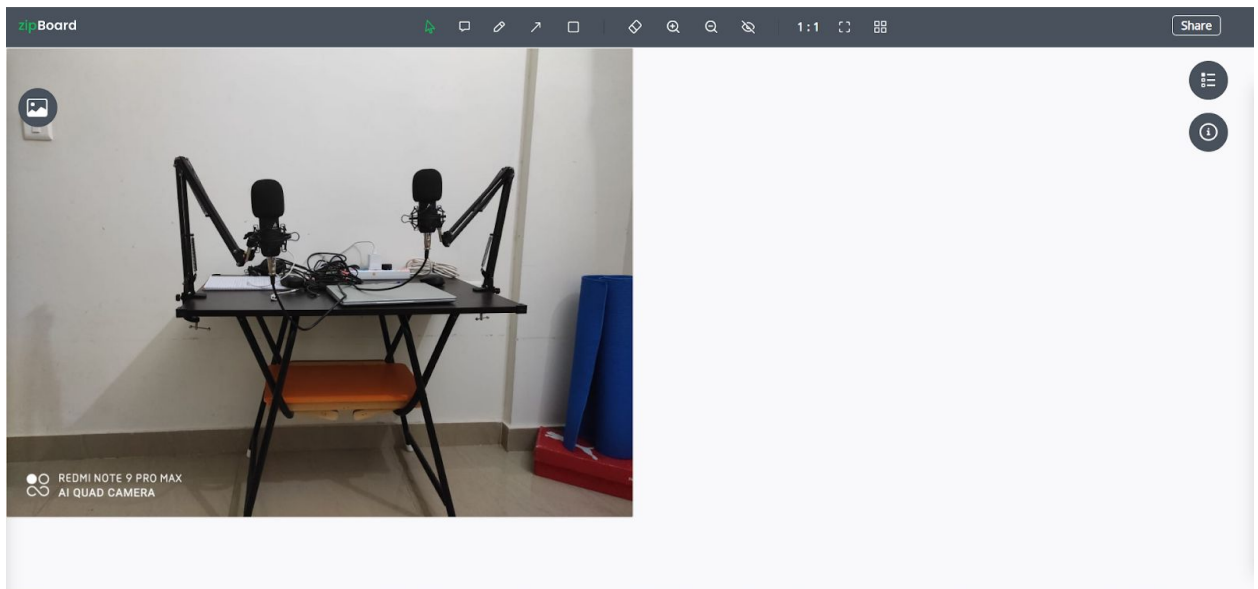
- Once you are in the “Files/URLs”, click “[Review](#)” under the image(or any type of content).



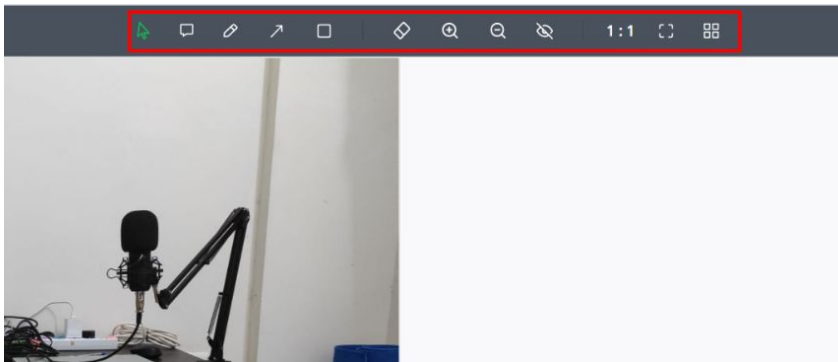
- You will be redirected to the “Review Summary” page. This page will provide you with all the details about all the reviews given to every file in that project including details like, who had given the reviews etc. Click on “Review” to proceed.



- You will come across a [page like below](#) which has a lot of components. Let us go ahead and see what each of them does.

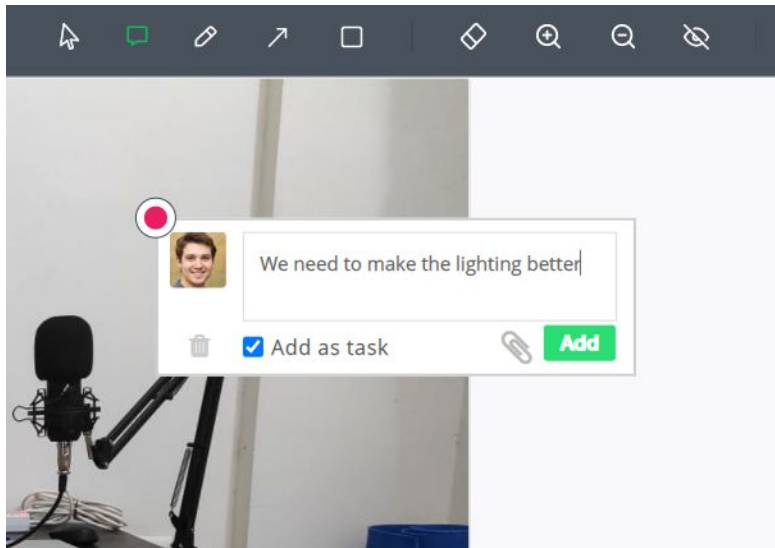


- On the top, you can see all of the [annotation tools](#) which are (from left): Select, Comment, Pencil, Arrow, Rectangle, Eraser, Zoom In, Zoom Out, Hide, 1:1 view, Fullscreen, Review Summary. Go ahead and try each one out to see what each one does.

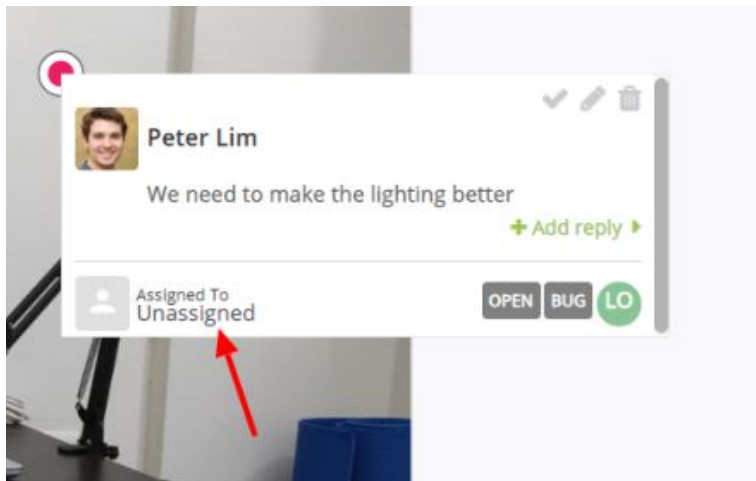


- Let us use the tool “Comment”, to give sample feedback and create a task. We can simply give our feedback here, and/or attach a relevant file, and/or [create a task](#). To create a

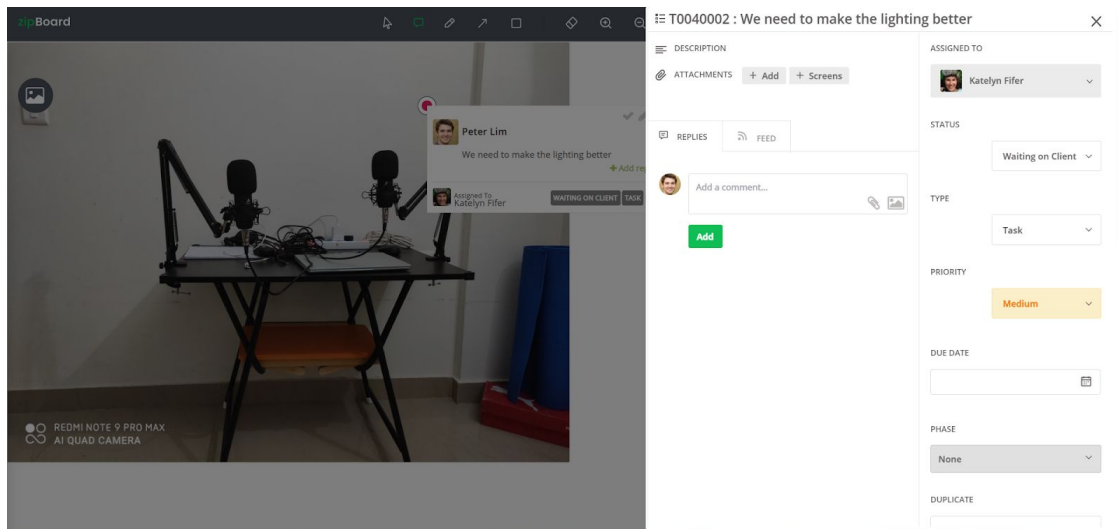
task, check the box near “Add as task” and then click on “Add”



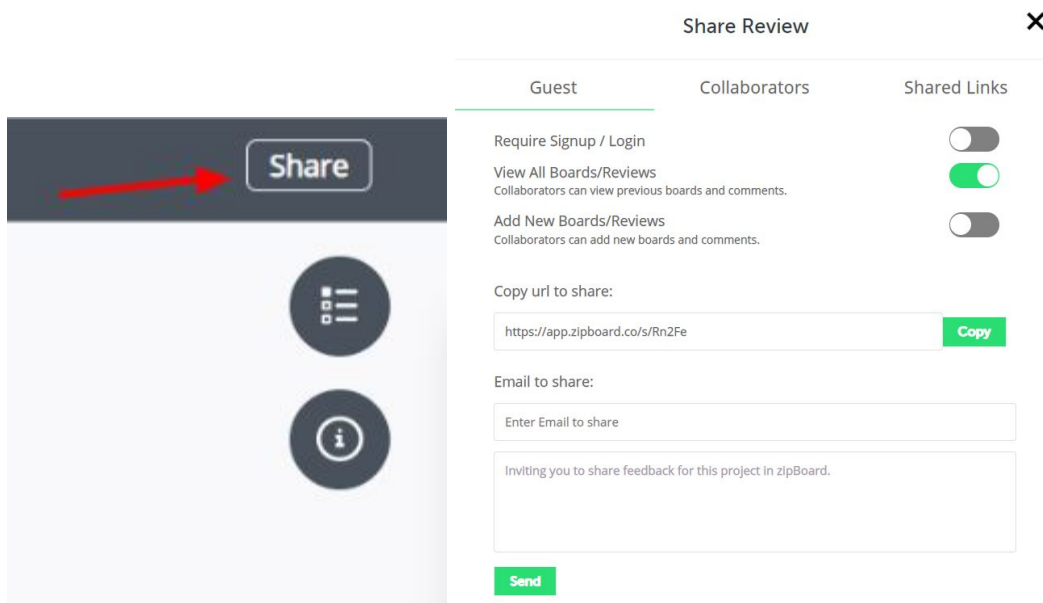
- As soon as you click on “Add” you will see a message like this, where you can assign the task to a particular team member, set priority for it, the type of task and it’s status. To edit the task’s details, click on [“Assigned To”](#).



- A pane will pop in from the right side of the screen, where you can [edit the details](#) of the task. Go ahead and explore it.

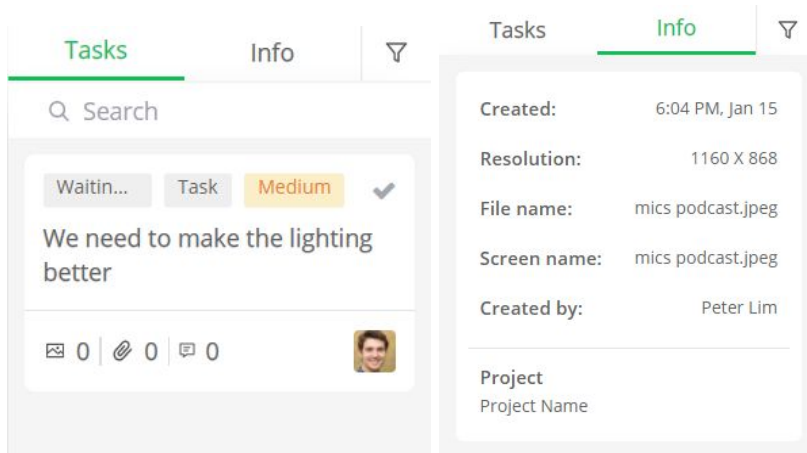


- “Share”, present in the top right corner, lets you share that particular review/screen with clients and/or collaborators.

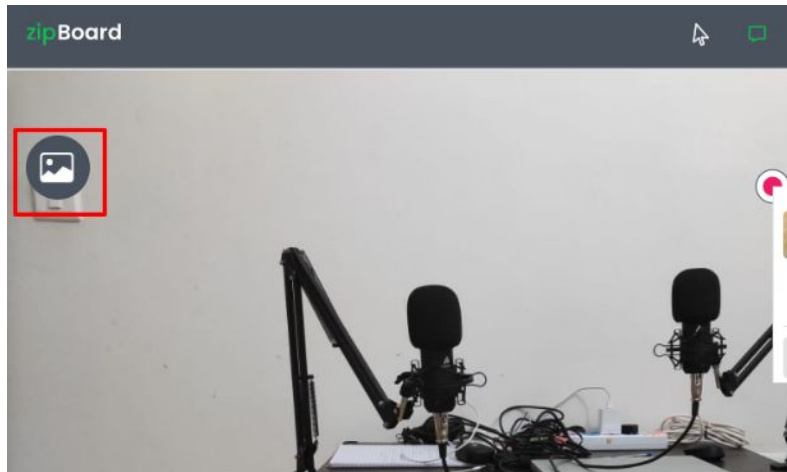


- The two buttons below it are “Tasks” and “Info”. “Tasks” shows all of the tasks created on this file and “Info” provides you with an overall summary. Go ahead and have a look around. You can use the funnel icon on the extreme right to filter through the tasks if you

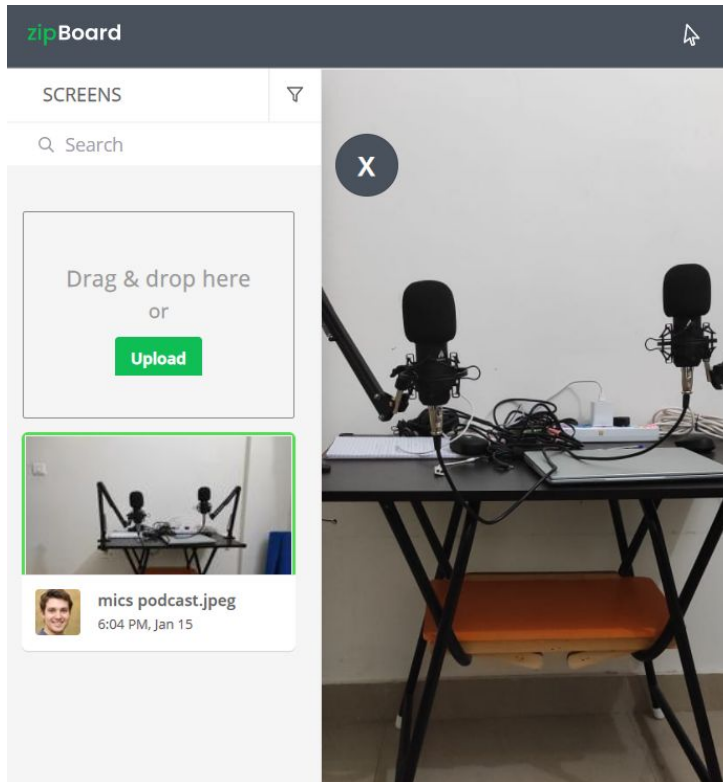
are looking for something particular.



- On the left side, you will find the “[Screens](#)” button. This feature allows you to instantly upload another piece of content and review it immediately.



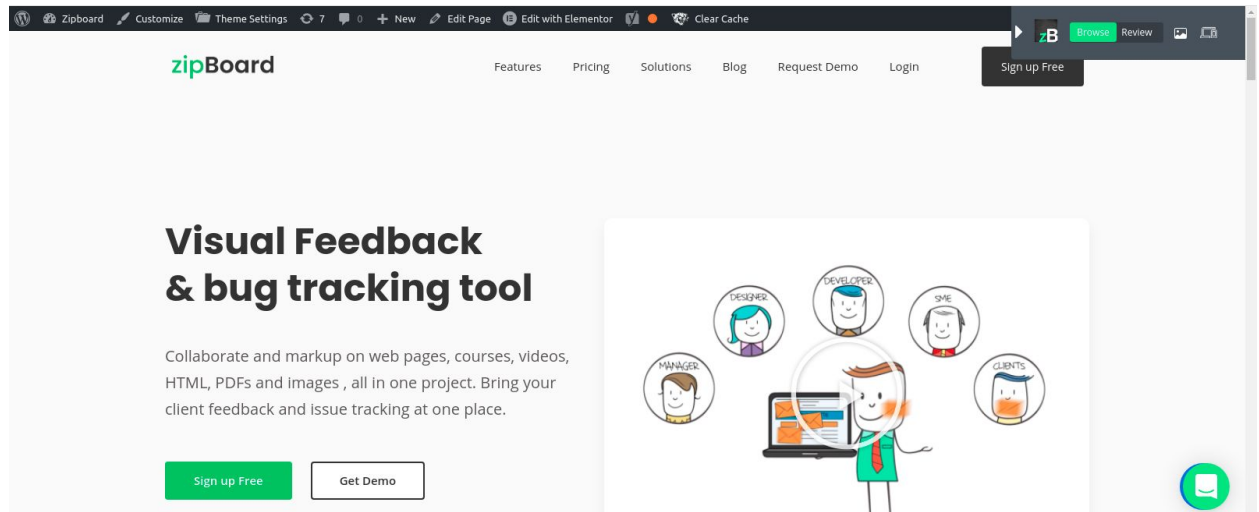
- You can also filter through the Screens, or search for something specific.



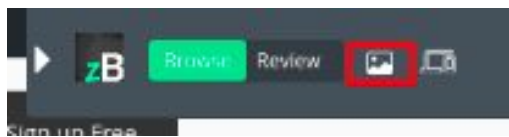
How to review a website? (example 2)

- If you are invited via link or email to review an URL, you can access the files under the “Files and URLs” section.
- You will be redirected to a new page where you will view the particular web page in “Browse” mode. This mode allows you to have a look around the page without making any comments or giving any reviews. You can minimize the extension in the top right

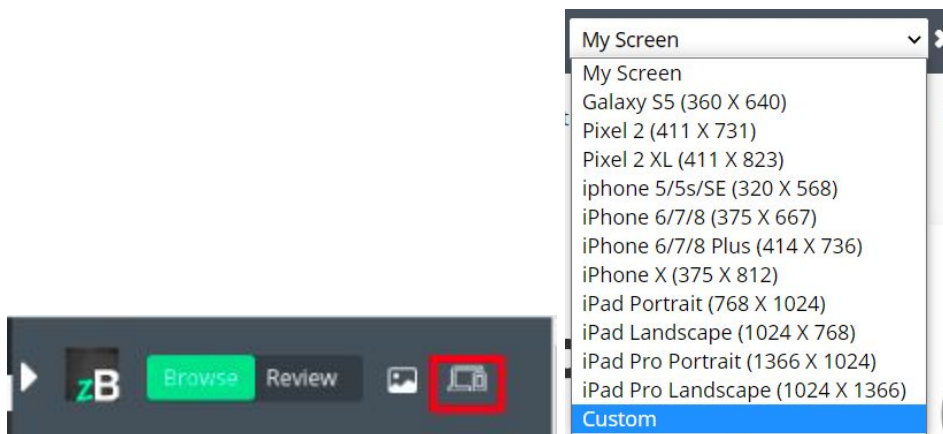
corner by using the “arrow”. Let us explore the features here.



- “Screens” will take you to the review summary page where you will be able to view all the past reviews of that particular file provided by all of the collaborators and external reviewers.

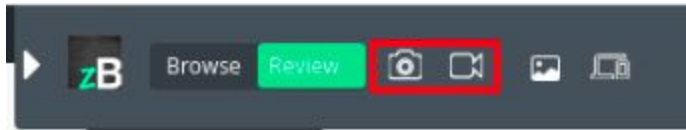


- The last icon, “Device Mode” helps you view the particular page in a specified resolution that is perfect for your project. We have added a few options for you, and you can always create a custom resolution tailored for your project.

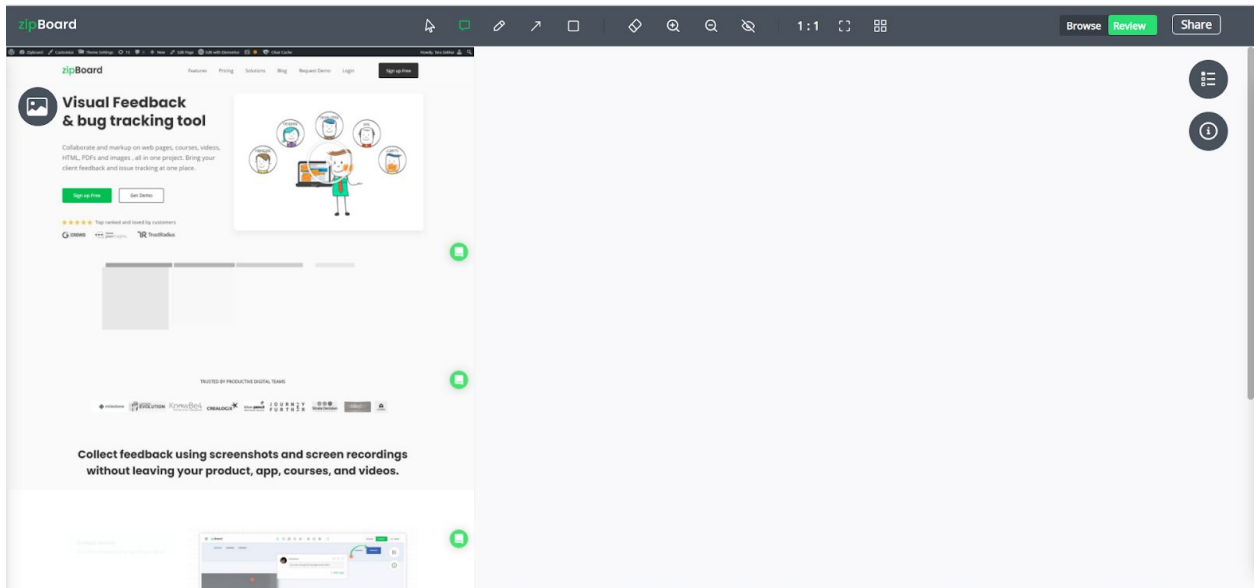


- When you switch to the “Review” mode, you will be able to see two more icons. “Screenshot” and “Video”. By using “Screenshot” you can capture a portion of the web project or the entire page. “Video” lets you record the screen along with your mic and

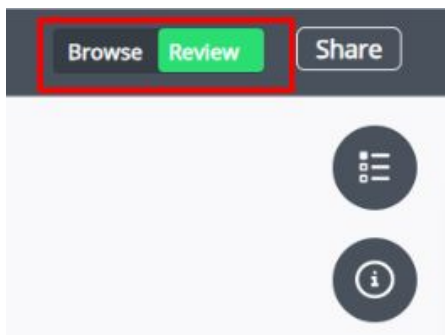
camera while giving detailed review and feedback.



- For the sake of this example, let us go ahead and capture the [full screenshot](#) of the website and review it. You will view a screen similar to the one below. You can give your comments and feedback by using the annotation tools. (See the previous example)



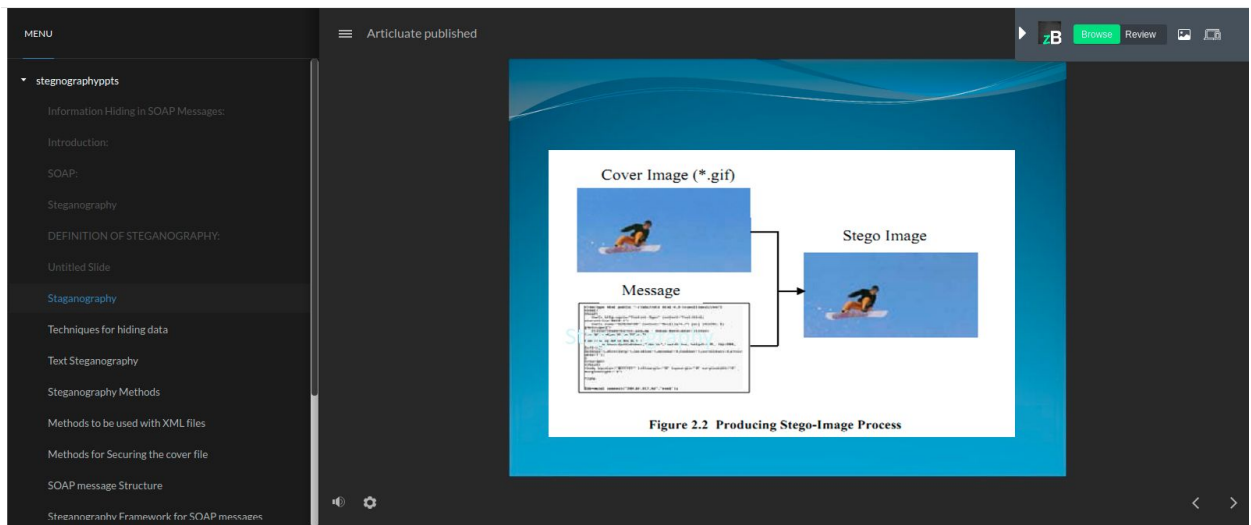
- You again can toggle between “Browse” and “Review” easily by using the options available at the top, if you desire to have a look once again.



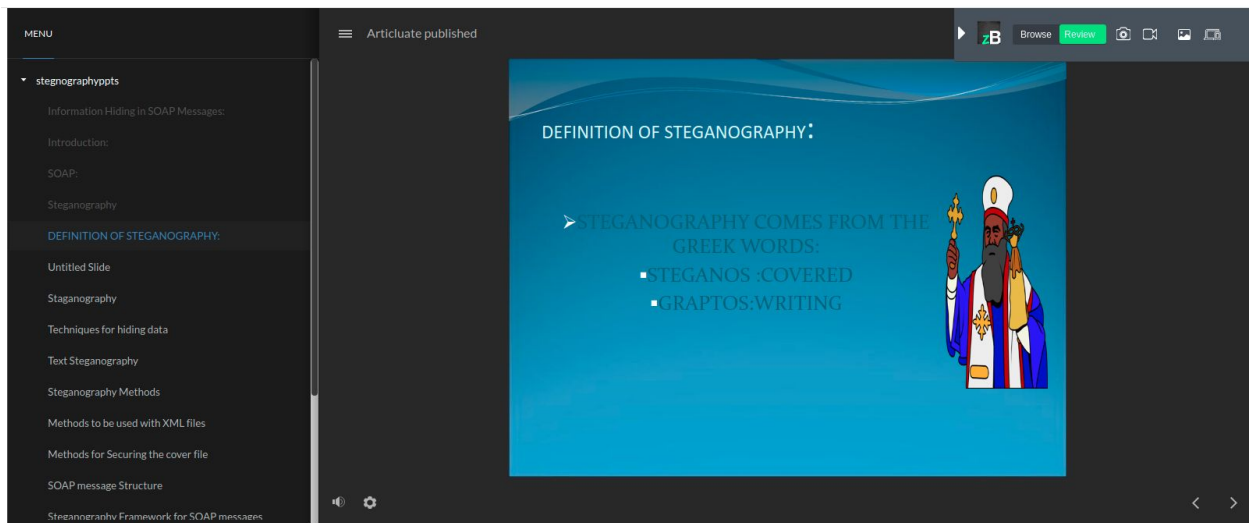
How to review an eLearning document? (example 3)

- Go to “Files and URLs” and choose the eLearning content that you want to review. Click on ‘Review’ if you are redirected to the “Review Summary” page.

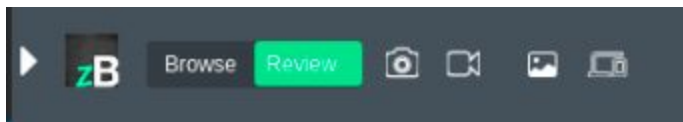
- You will be directed to a new tab where you can view your eLearning course file in “Browse” mode.



- After navigating to the slide on which you want to give review, you can switch to “Review” mode.

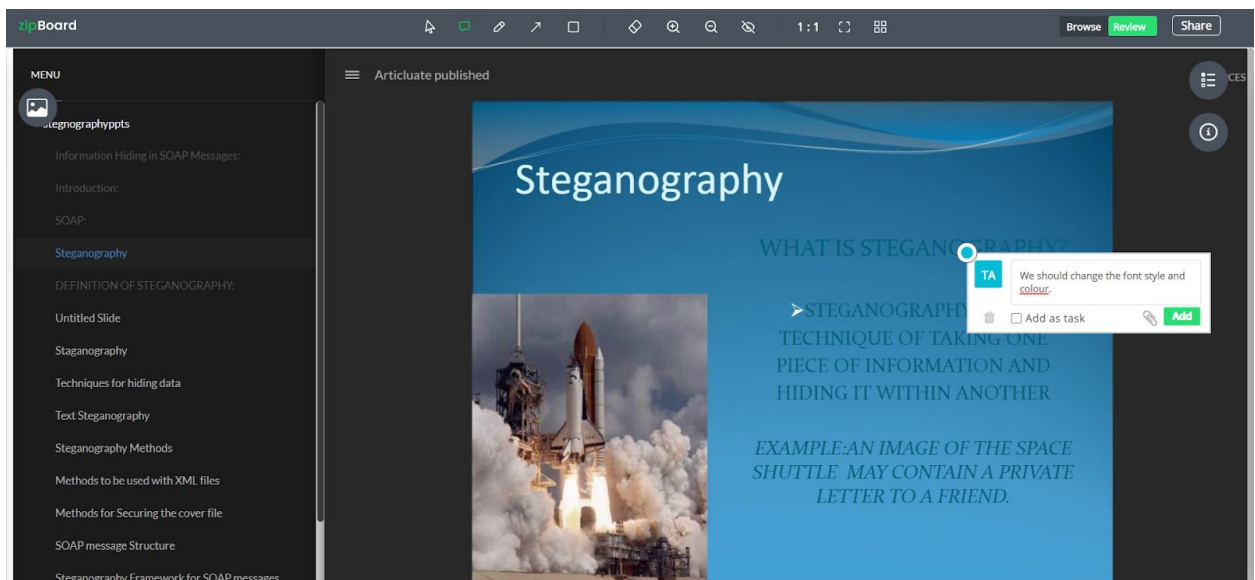


- By using the buttons on the top right corner, you can take screenshots, record your screen along with your mic and camera, view the existing screens for this particular file or view your course in different resolutions. Let us take a screenshot and review a part of our eLearning course.



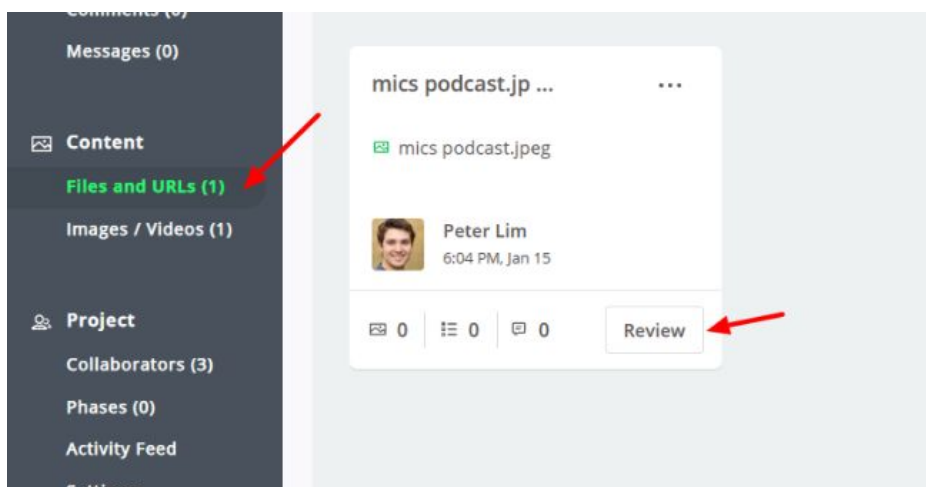
- After you take a screenshot, you will be redirected to a new page in the same tab where you will be able to annotate and give your [feedback](#) and create tasks. (see example 1 and

2)



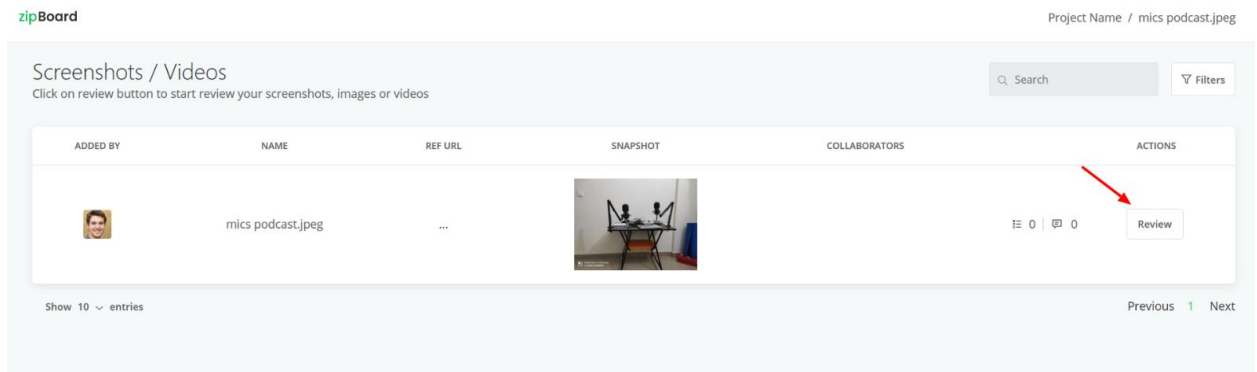
How to review an Image? (example 1)

- Once you are in the “Files/URLs”, click “[Review](#)” under the image(or any type of content).

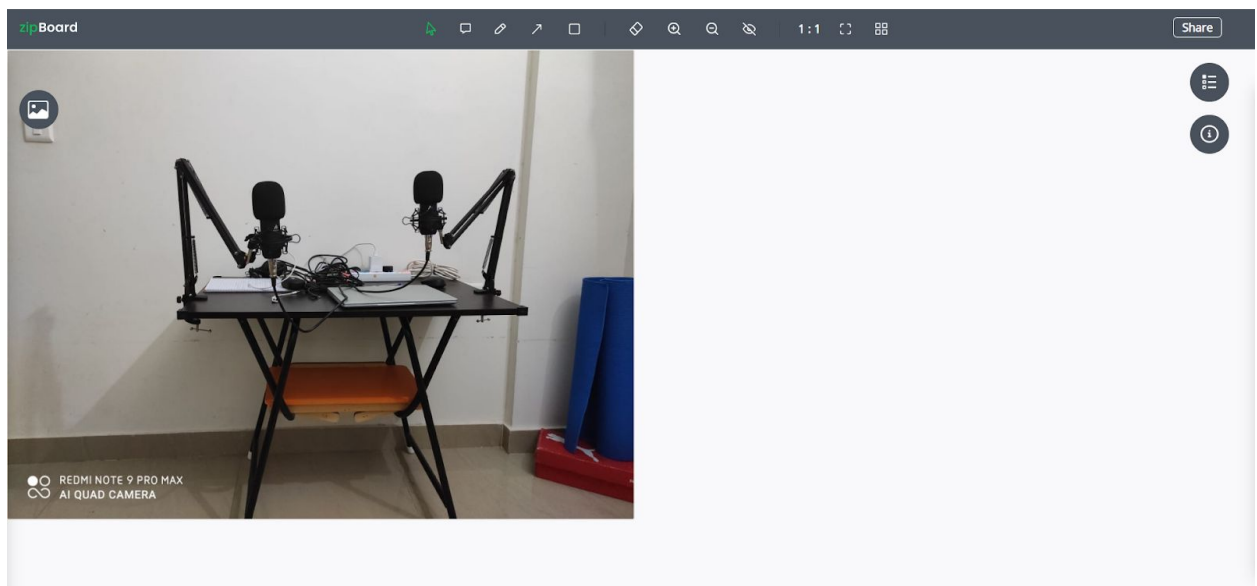


- You will be redirected to the “Review Summary” page. This page will provide you with all the details about all the reviews given to every file in that project including details like,

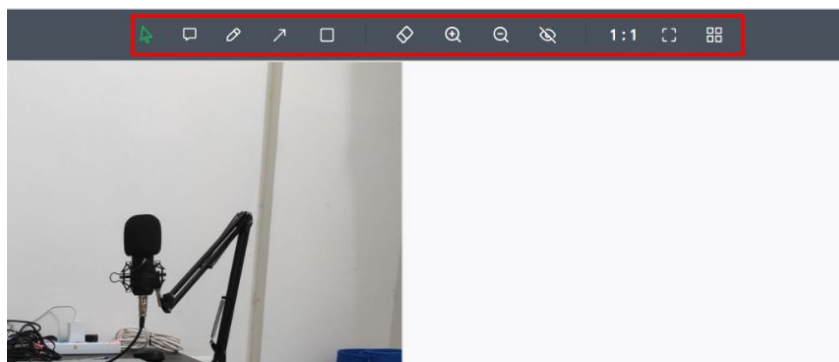
who had given the reviews etc. Click on “Review” to proceed.



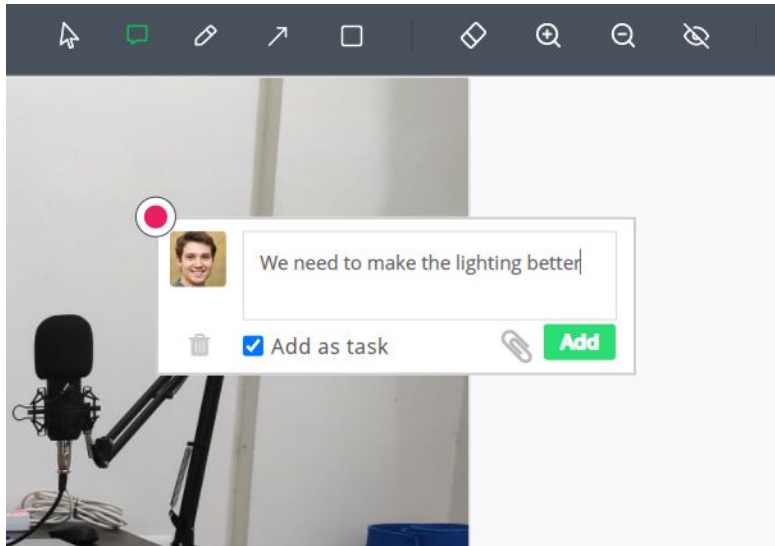
- You will come across a [page like below](#) which has a lot of components. Let us go ahead and see what each of them does.



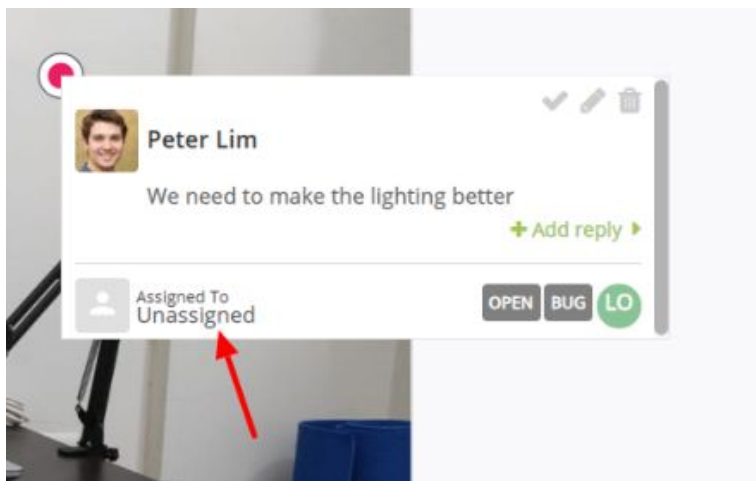
- On the top, you can see all of the [annotation tools](#) which are (from left): Select, Comment, Pencil, Arrow, Rectangle, Eraser, Zoom In, Zoom Out, Hide, 1:1 view, Fullscreen, Review Summary. Go ahead and try each one out to see what each one does.



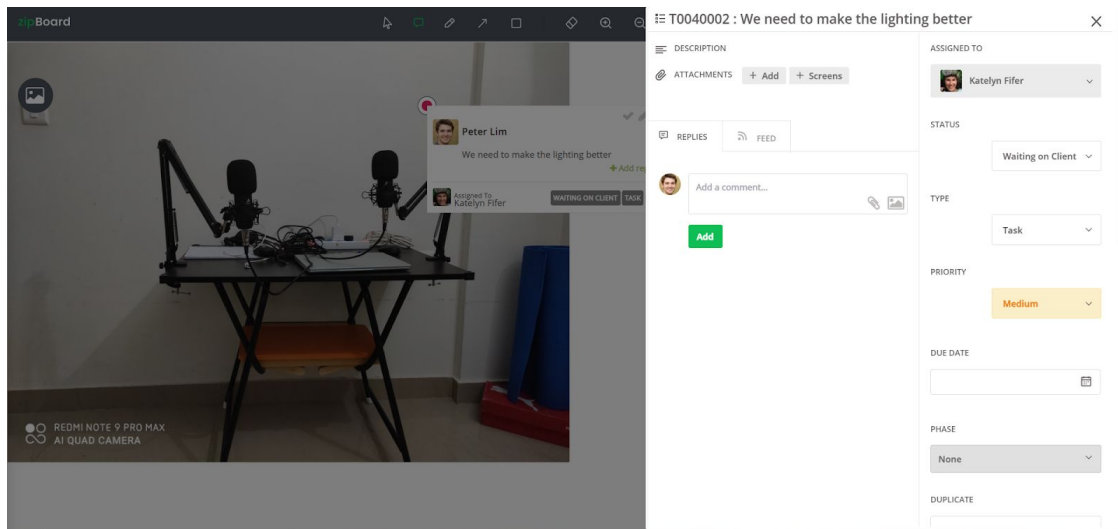
- Let us use the tool “Comment”, to give sample feedback and create a task. We can simply give our feedback here, and/or attach a relevant file, and/or [create a task](#). To create a task, check the box near “Add as task” and then click on “Add”



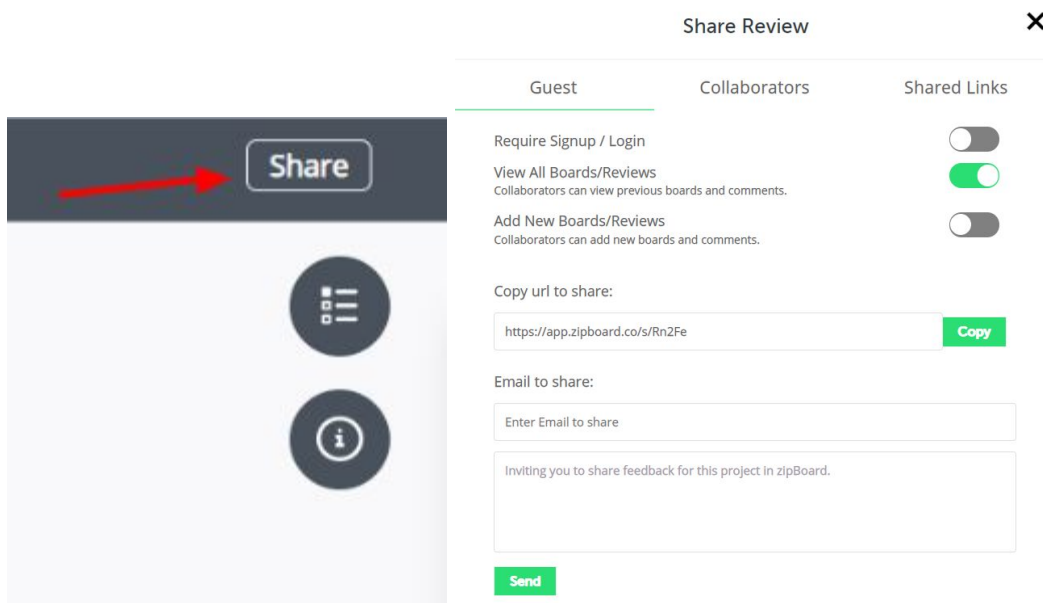
- As soon as you click on “Add” you will see a message like this, where you can assign the task to a particular team member, set priority for it, the type of task and it’s status. To edit the task’s details, click on [“Assigned To”](#).



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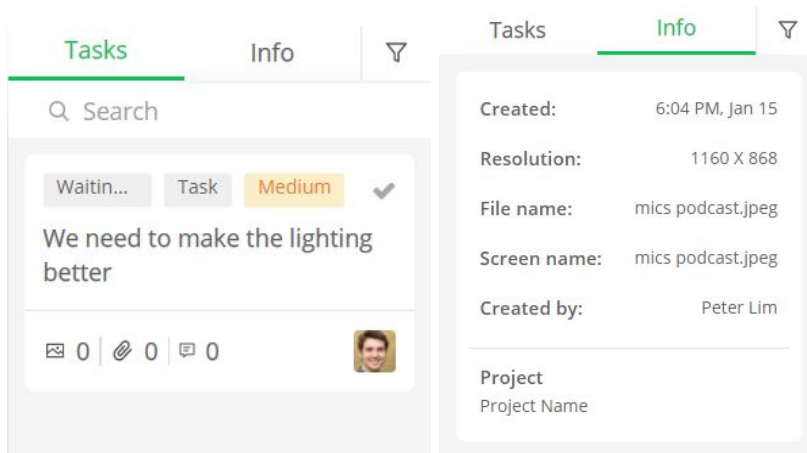


- “Share”, present in the top right corner, lets you share that particular review/screen with clients and/or collaborators.

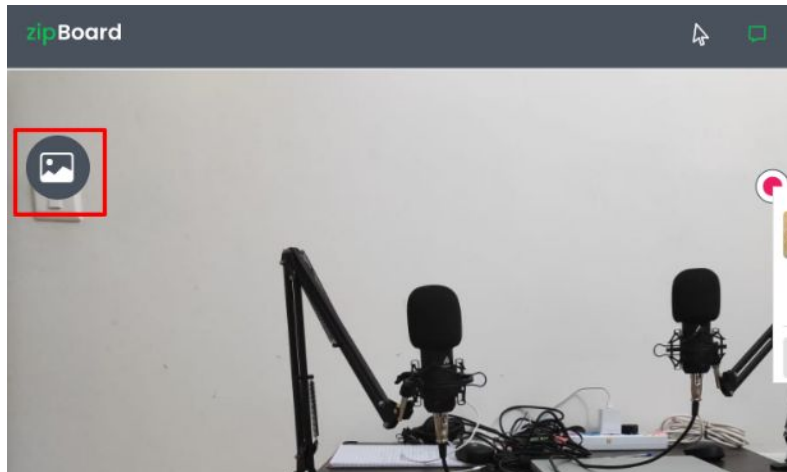


- The two buttons below it are “Tasks” and “Info”. “Tasks” shows all of the tasks created on this file and “Info” provides you with an overall summary. Go ahead and have a look around. You can use the funnel icon on the extreme right to filter through the tasks if you

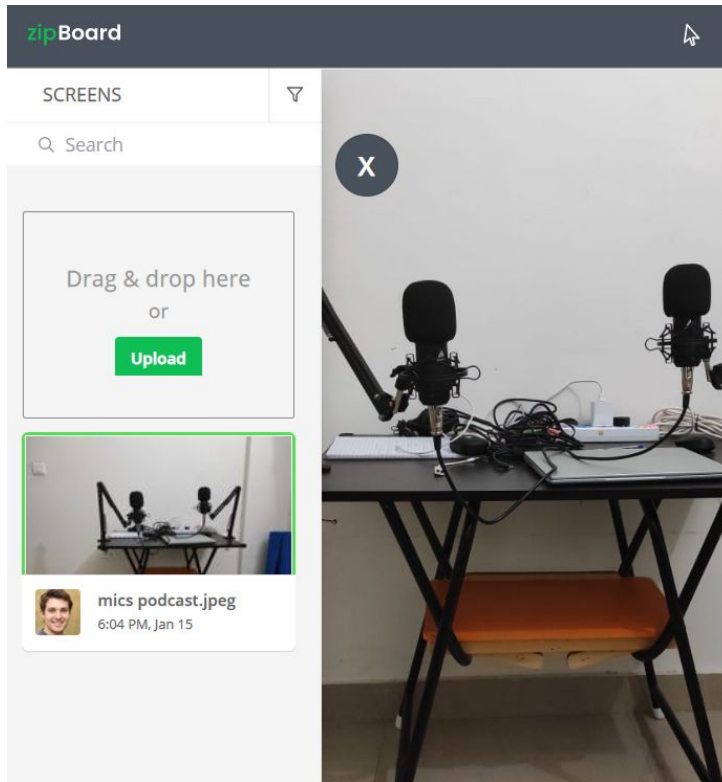
are looking for something particular.



- On the left side, you will find the “[Screens](#)” button. This feature allows you to instantly upload another piece of content and review it immediately.



- You can also filter through the Screens, or search for something specific.



Thank You

Thank you for trusting zipBoard.

We are excited to learn how you plan to use it and help you in any way we can to help you do your best work.

We at zipBoard consistently work to improve our product and your feedback is the first and most important step to it.

Write to us: support@zipboard.co

For any further help on this guide, please check out our online [help documents](#).



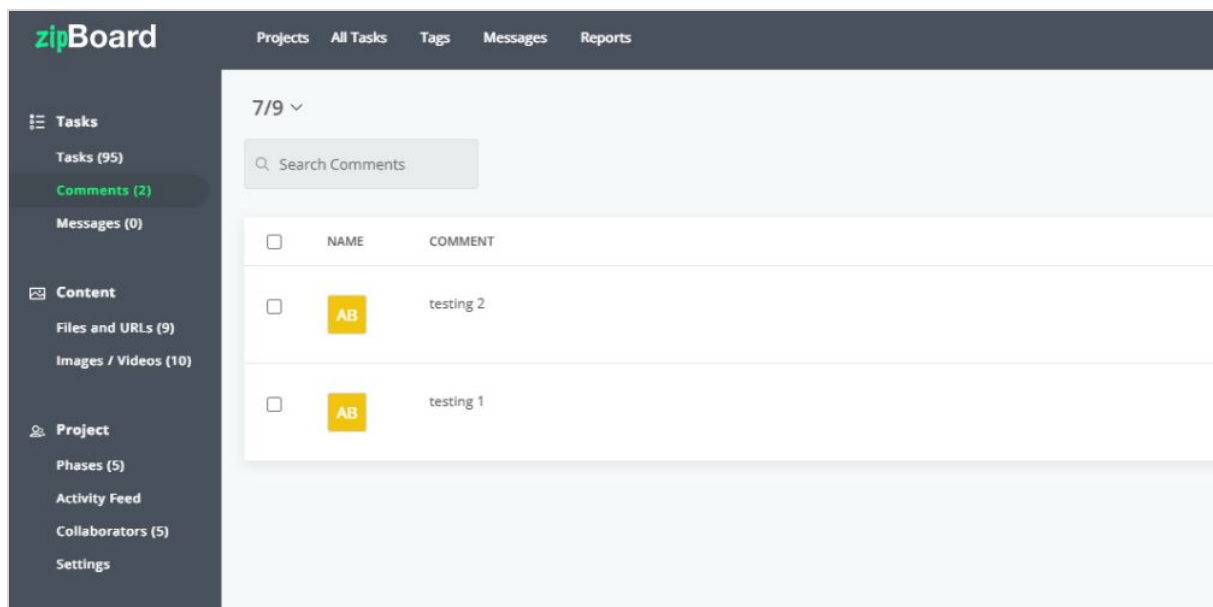
Appendix 1: Components of the Menu Bars

Left Menu Bar

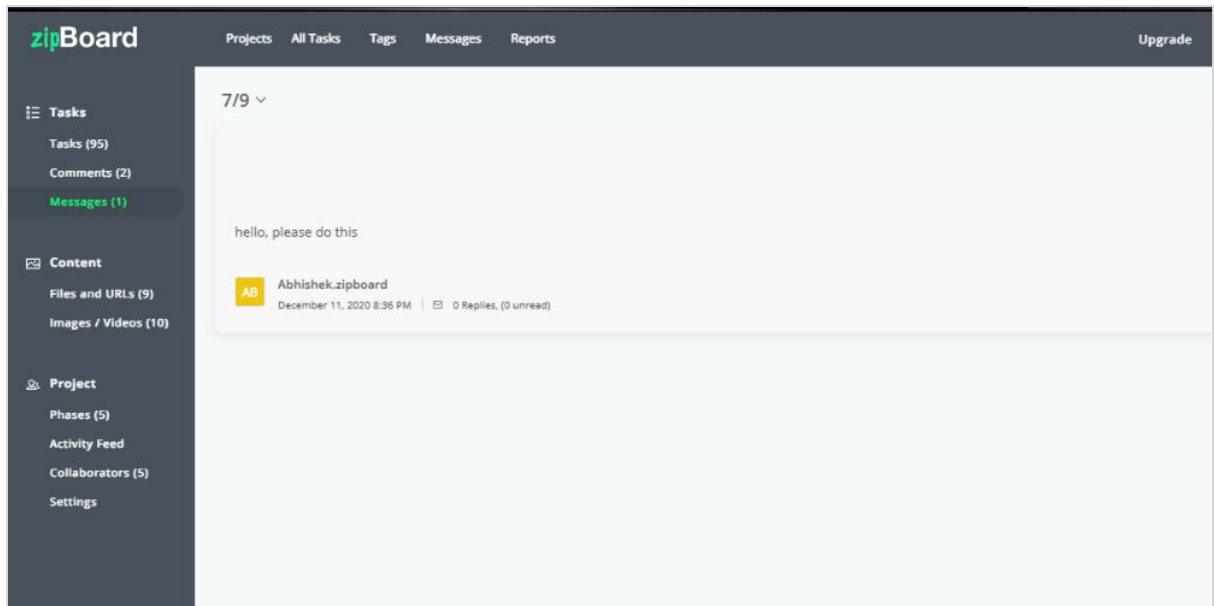
The three sections of the left menu bar will help you to use different features of zipBoard in a particular project.

Tasks

- A. **Tasks:** Click on the tasks subsection to get an overview of all the tasks along with their details within the project in two formats namely table style view(a list of all the tasks) and kanban style view (a list along with the featured image of the task file). Clicking on any task from the list gives you an overview of all the details of the specific task with options to add a description, reply to comments, check the activity feed of the task, and most importantly assign a task to another team member within the project with priority, type, and completion date options with the flexibility to add more watchers if required. You can also add a new task, review existing content files, or add new files, and even import or download CSV into and to your local drive respectively.
- B. **Comments:** Click on the comments subsection to get an overview of all the comments by the team within a specific project with the option of [adding new feedbacks](#).



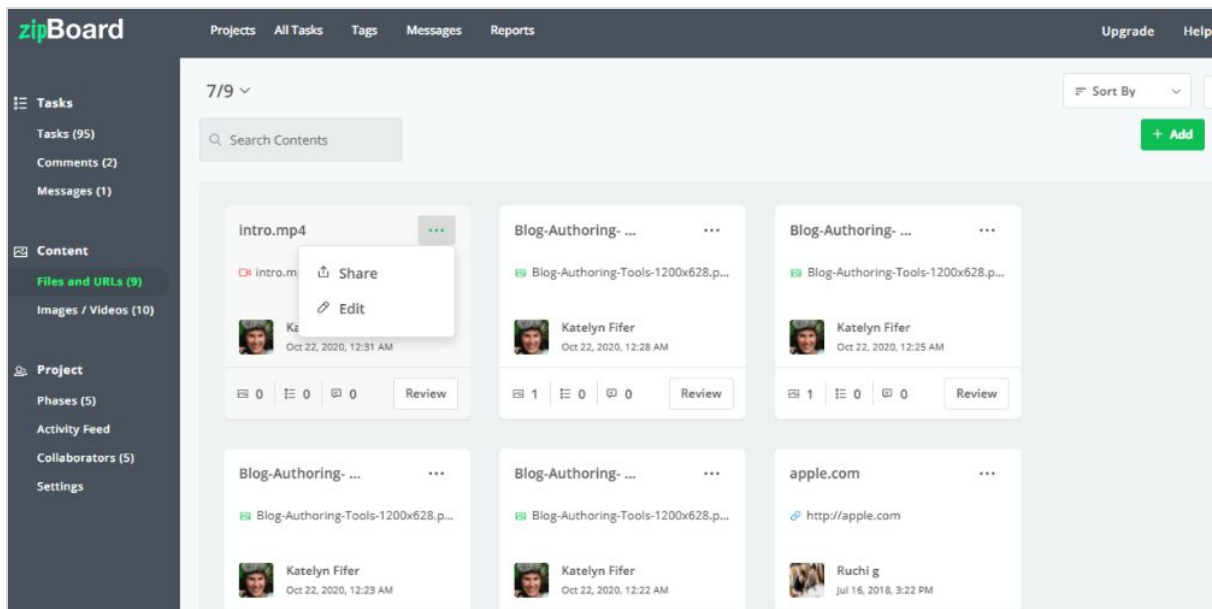
- C. **Messages:** Click on the messages subsection to get an overview of all the [messages](#) by the team for the project you created.



Content

Click on the content section on the left menu bar to get an overview of all the multimedia files within the project and start reviewing all the files separately with options to share links for guest collaboration (without login) or existing members for collaboration.

You can also [add new multimedia](#) files if needed.



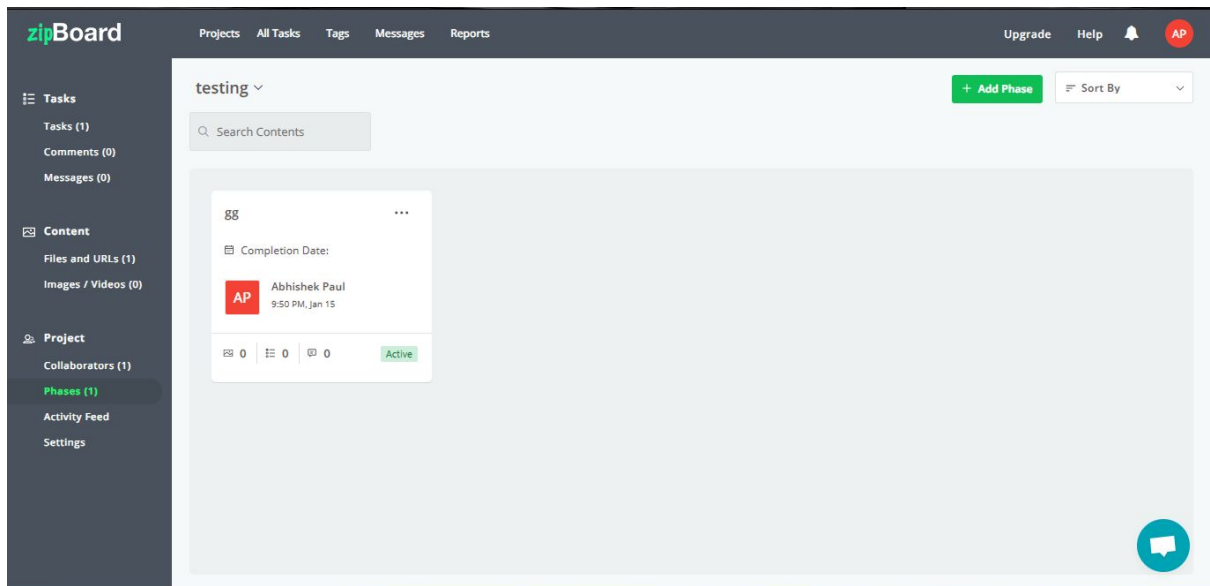
Clicking the share button also gives an overview of all the file shares with additional details such as permissions assigned and actions are taken on the shared file.

Project

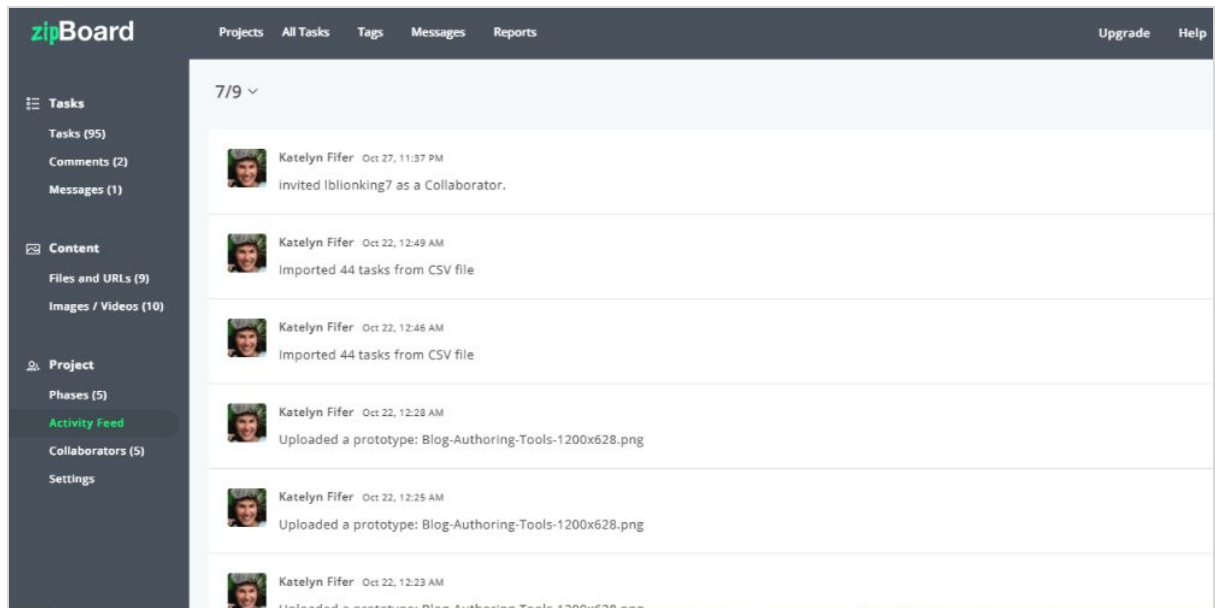
- A. **Phases-** Click on the phases' subsection to get a list of all the [phases](#) for the project.

Clicking on any phase will give a detailed view of the completion date and [current status](#) of the project phase and a few other options like the files/links view button, add more tasks and comments for the specific phase of the project. As an admin, you can also list a

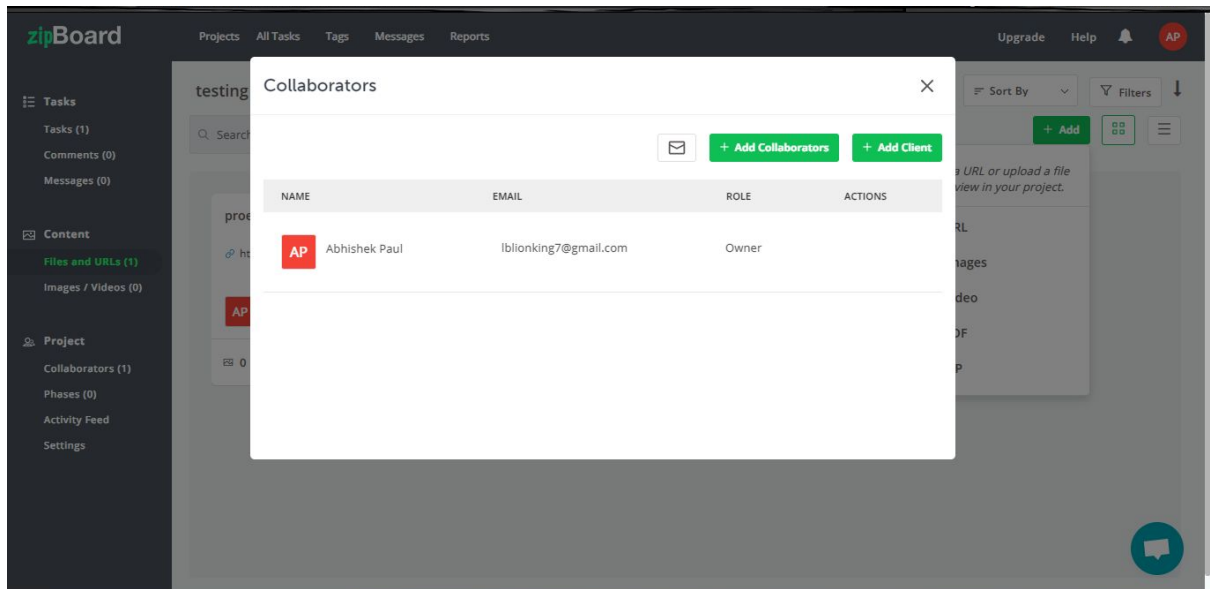
[new phase.](#)



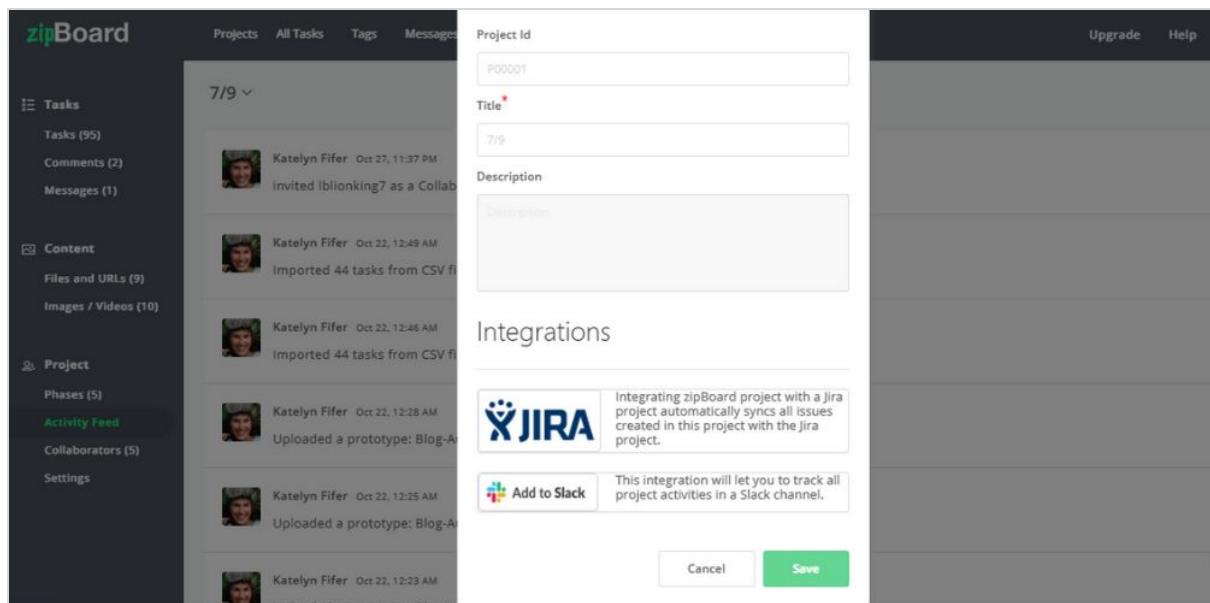
- B. **Activity feed**- Clicking on the activity feed subsection on the left menu bar gives a detailed list of all the activities undertaken within the project.



- C. **Collaborators**- Clicking on the collaborator's subsection gives a glimpse of all the collaborators within the project with options to [add new collaborators and clients](#).



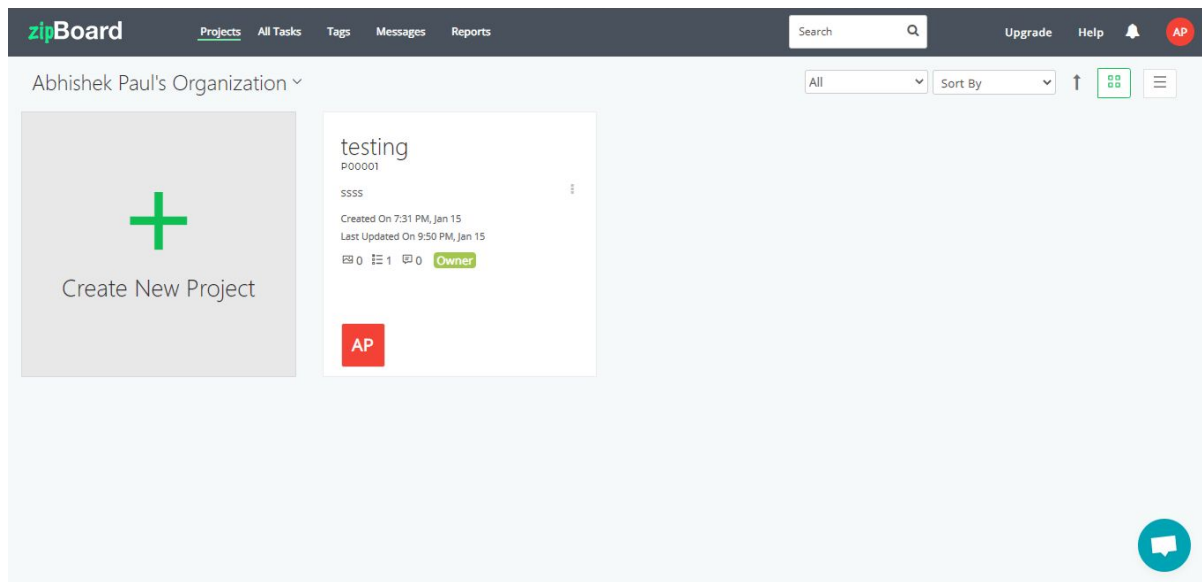
- D. **Settings**- Clicking on the settings subsection gives a detailed overview of the project that includes project id, title, description, and integrations set up by the owner of the project with the flexibility to add additional integrations like [JIRA](#) and [Slack](#).



Top Menu Bar

Projects

Clicking on the projects section on the top menu bar gives an overview of all your existing projects(if any) and the “[Create New Project](#)” widget option.



All Tasks

Clicking on the [all tasks](#) section gives a detailed list of all the tasks within the project with the option to filter the list according to the organization, project, assignment to collaborators, reporter, status, priority, and type, and an additional button of reset for convenience which are [downloadable](#). Clicking on a specific task within a project gives details of the task such as topic, description, attachments, and replies within the task and also additional options such as add more files or screenshots for the task, comment to the replies with texts, and multimedia attachments and also view the activity feed of the task.

Apart from this, the collaborator also gets a detailed list of the collaborator/s for the task with their type, status, priority, due date, phase, tags, watchers, reporter, and reporting information.

The all tasks section also has a sub-section called feedback which when clicked gives a detailed

list of all the feedback for tasks within the project.

zipBoard

Projects

All Tasks

Tags

Messages

Reports

Upgrade

Help

Tasks

Feedback

Download

Search

Organization

Project

Assigned To (1)

Reported By

Status

Priority

Type

Reset

Hide/Show Columns

<input type="checkbox"/>	ID	TITLE	PROJECT NAME	ASSIGNED TO	REPORTED BY	STATUS	TYPE	PRIORITY	UPDATED ON	ACTION
<input type="checkbox"/>	T0280051	zipBoard : security whitepaper	zipBoard Marketing	Abhishek.zipboard	Bhavya Aggarwal	Open	Task	High	Dec 08, 2020	edit
<input type="checkbox"/>	T0280046	Create zipBoard security page, and also a help question for security	zipBoard Marketing	Abhishek.zipboard	Bhavya Aggarwal	Open	Bug	High	Dec 08, 2020	edit
<input type="checkbox"/>	T0280049	Create an intro video for zipBoard. Look at the video here: https://www.youtube.com/watch?v=E28b9bFJSJw . For script, see description and for audio use googles text to speech	zipBoard Marketing	Abhishek.zipboard	Bhavya Aggarwal	Open	Bug	Low	Nov 18, 2020	edit

Show 50 entries

Previous

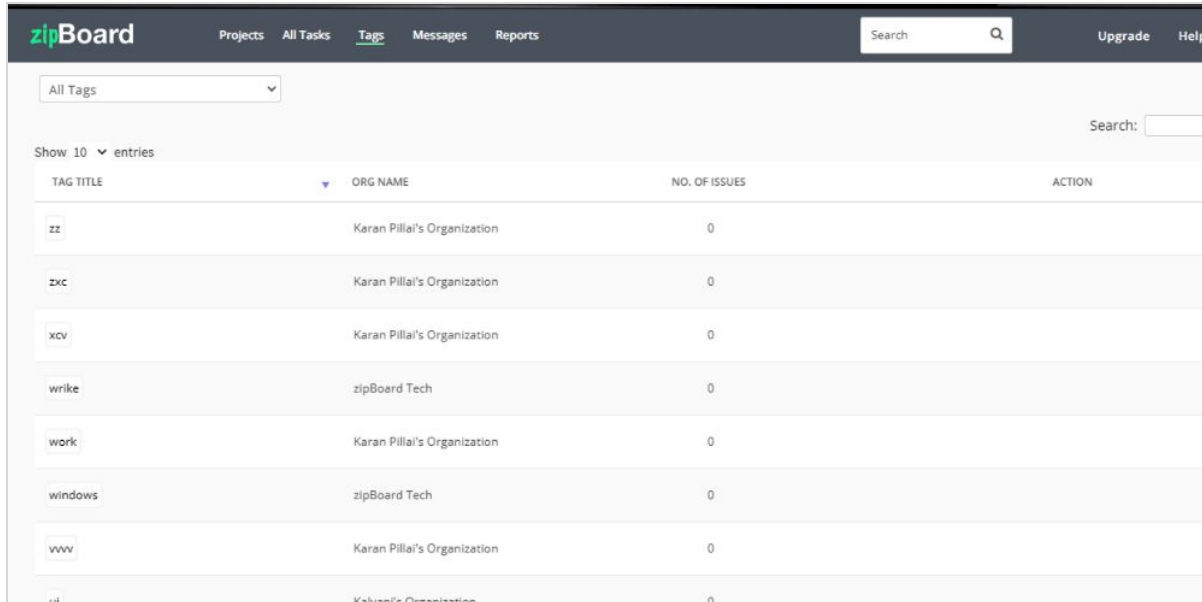
1

Next

Tags

Clicking the tags section on the top menu bar gives a list of all the tags with their respective organization name, number of issues, and action taken for the tags with an additional option to search as per relevance. Clicking on the [add tag](#) button on the top right corner of the tags section

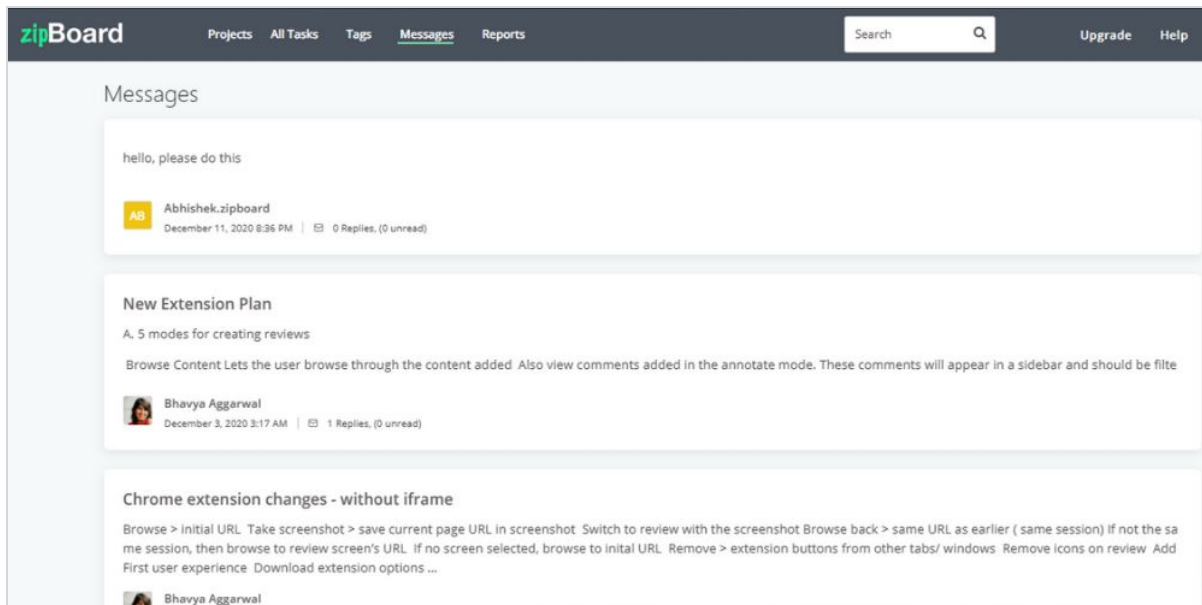
gives the option to add more tags for specific organizations if any.



TAG TITLE	ORG NAME	NO. OF ISSUES	ACTION
zz	Karan Pillai's Organization	0	
zxc	Karan Pillai's Organization	0	
xcv	Karan Pillai's Organization	0	
write	zipBoard Tech	0	
work	Karan Pillai's Organization	0	
windows	zipBoard Tech	0	
www	Karan Pillai's Organization	0	
ui	Kalvani's Organization	0	


Message

Clicking on the message section redirects to all [messages](#) page within the project and also additional features like replying to the messages with texts and multimedia files and composing new messages if any.



Messages


hello, please do this

 Abhishek.zipboard
December 11, 2020 8:36 PM | 0 Replies, (0 unread)

New Extension Plan


A. 5 modes for creating reviews

Browse Content Lets the user browse through the content added. Also view comments added in the annotate mode. These comments will appear in a sidebar and should be file

 Bhavya Aggarwal
December 3, 2020 3:17 AM | 1 Replies, (0 unread)

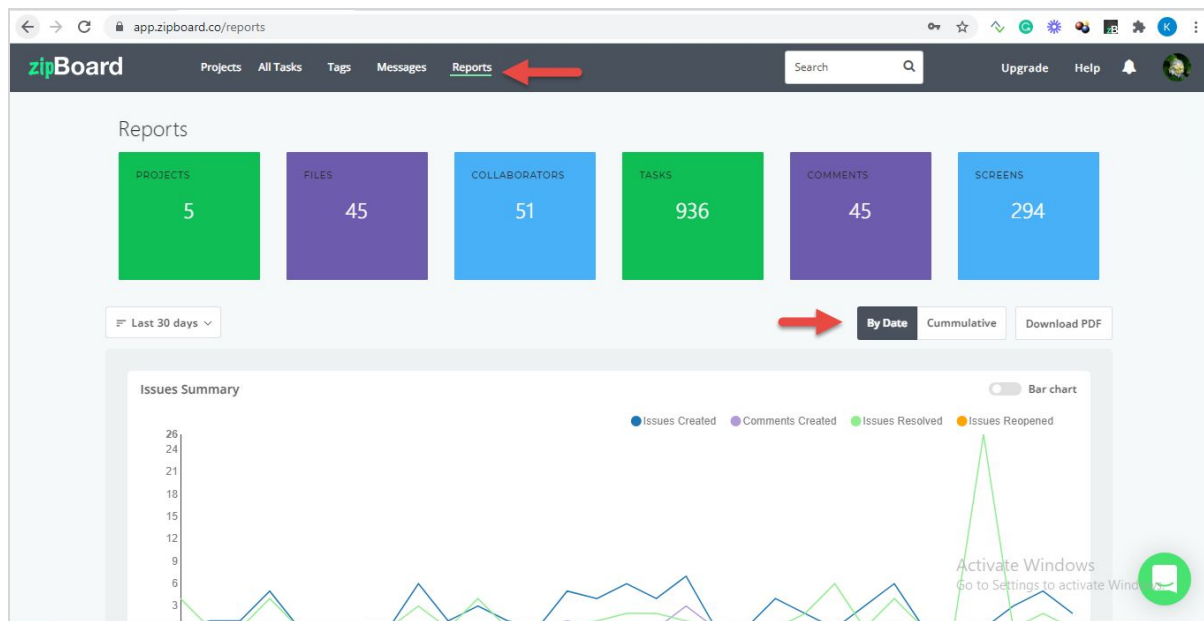
Chrome extension changes - without iframe

Browse > Initial URL. Take screenshot > save current page URL in screenshot. Switch to review with the screenshot. Browse back > same URL as earlier (same session). If not the same session, then browse to review screen's URL. If no screen selected, browse to initial URL. Remove > extension buttons from other tabs/ windows. Remove icons on review. Add First user experience. Download extension options ...

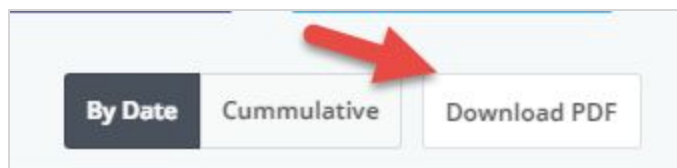
 Bhavya Aggarwal

Reports

Clicking the [reports](#) section(available for enterprise plan only) gives you access to information about Projects, Files, Tasks, Collaborators, comments, and screens and also can Issue summary by date and also cumulative.



You can also download reports in pdf format by clicking on "[Download PDF](#)"



There is also a **search bar**, **profile icon**, and **notification icon** on the top corner of the menu bar that prompts new notifications for the projects such as the assignment of tasks, mentions, and much more helping you stay updated on all the activities within the project/projects.