

# The Workspace

## Provides Visibility & Control



**Meet Sarah** – she monitors all requests for her function in one place so she can spot trends, report instantly, and improve how the team works ...

Using the Shared Services Agent Workspace  
could not be easier. All requests clearly labelled

The screenshot displays the 'Kim - The Task Automation Platform' interface. The top navigation bar includes 'Help', a user profile for 'Craig Paterson', and a 'User Menu'. The left sidebar contains navigation links: 'Get Started', 'Examples', 'Applications' (with a sub-link 'Select category and use form.'), '1. Use Cases (Examples)', '2. Core Functionality', '+ Create Application', and 'Settings'. The main content area shows a table of tasks under the 'Assigned' filter, with '6 Records' and a 'Draft' button. The table has columns: 'Subject', 'Activity', 'Note', 'Approval', 'Attachment', 'Version', and 'Action'. A red box highlights the 'Subject' column, and a red arrow points to the 'Activity' column.

Subject	Activity	Note	Approval	Attachment	Version	Action
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jul 21, 2025	Downloaded ...		Commercial Operations-Awaiting A...	3	2	⋮
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jul 21, 2025	Email sent	approved	Override (no step)-Completed	3	3	⋮
Pricing Exception Request ABC France... Demo Site Applications - Pricing Exception ... Craig Paterson Jul 17, 2025	Email sent	Cp was off and happy to approve	Commercial Finance-Awaiting Appr...	3	3	⋮
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jul 16, 2025	Email sent	no buget	Override (no step)-Aborted	3	3	⋮
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jun 16, 2025	Email sent		Regional MD-Completed	2	2	⋮
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jun 13, 2025	Downloaded ...		MD Regional-Awaiting Approval	1	1	⋮

Kim - The Task Automation Platform

Help Craig Paterson User Menu

Assigned 6 Records Draft

Search

Subject	Activity	Note	Approval	Attachment	Version	Action
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jul 21, 2025	Downloaded ...		Commercial Operations-Awaiting A...	3	2	⋮
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jul 21, 2025	Email sent	approved	Override (no step)-Completed	3	3	⋮
Pricing Exception Request ABC France... Demo Site Applications - Pricing Exception ... Craig Paterson Jul 17, 2025	Email sent	Cp was off and happy to approve	Commercial Finance-Awaiting Appr...	3	3	⋮
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jul 16, 2025	Email sent	no buget	Override (no step)-Aborted	3	3	⋮
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jun 16, 2025	Email sent		Regional MD-Completed	2	2	⋮
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jun 13, 2025	Downloaded ...		MD Regional-Awaiting Approval	1	1	⋮

+ Create Application

Settings 9.4.1

A range of available actions

The screenshot displays the 'Kim - The Task Automation Platform' interface. On the left, there's a sidebar with 'Get Started', 'Examples', and 'Applications' sections. The main area shows a list of 'Assigned' records (6 Records) with columns for 'Subject', 'Activity', and 'No'. The records are 'Pricing Exception Request' entries for 'Demo Site Applications - Pricing Exception ...' by 'Craig Paterson' with various dates and activities like 'Downloaded ...', 'Email sent', and 'Completed'. A context menu is open over the list, showing a range of available actions: Activity, Attachment, Copy, Delete, Download, Manage, Note, Preview, Renewals & Alerts (Override), Send Mail, Send Webform Update Link, Share, Subform, and Update Webform. A red arrow points from the text 'A range of available actions' to the context menu. Another red arrow points from the 'Action' column header in the table to the context menu.

Subject	Activity	No
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jul 21, 2025	Downloaded ...	
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jul 21, 2025	Email sent	ap
Pricing Exception Request ABC France... Demo Site Applications - Pricing Exception ... Craig Paterson Jul 17, 2025	Email sent	Cp
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jul 16, 2025	Email sent	no
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jun 16, 2025	Email sent	
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jun 13, 2025	Downloaded ...	

- Activity
- Attachment
- Copy
- Delete
- Download
- Manage
- Note
- Preview
- Renewals & Alerts (Override)
- Send Mail
- Send Webform Update Link
- Share
- Subform
- Update Webform

	Attachment	Version	Action
tions-Awaiting A...	3	2	⋮
Completed	3	3	⋮
e-Awaiting Appr...	3	3	⋮
Aborted	3	3	⋮
pleted	2	2	⋮
ing Approval	1	1	⋮

Kim - The Task Automation Platform

Get Started

Examples

Applications

Select category and use form.

1. Use Cases (Examples)

2. Core Functionality

+ Create Application

Settings

9.4.1

Assigned

Subject

Pricing Demo Craig 8 Jul 21, 2

Pricing Demo Craig 8 Jul 21, 2

Pricing Demo Craig 8 Jul 17, 2

Pricing Demo Craig 8 Jul 16, 2

Pricing Demo Craig 8 Jun 16, 2

Pricing Demo Craig 8 Jun 13, 2

Advanced Search

Search

☐ Include Attachments

Username

Enter email address

Created From

Select a date...

To

Select a date...

Updated From

Select a date...

To

Select a date...

Subject

Notes

Application

Select an option

Campaign

Activity

☐ Include Closed

Search

Close

Help

Craig Paterson

User Menu

Search

Approval

Attachment

Version

Action

Commercial Operations-Awaiting A...

3

2

Override (no step)-Completed

3

3

approve Commercial Finance-Awaiting Appr...

3

3

Override (no step)-Aborted

3

3

Regional MD-Completed

2

2

MD Regional-Awaiting Approval

1

1

Comprehensive search

**Bulk data download  
& other actions**

Kim - The Task Automation Platform

Help ⓘ Karl Chapman ▾

- Bulk Download
- My Billing Plan
- My Profile
- My Activity
- Privacy Policy
- Terms and Conditions
- Data Processing Agreement
- Get Support/Contact Us
- Log Out

Help ⓘ Craig Paterson ▾  
User Menu

Assigned 6 Records

Subject	Attachment	Approval	Attachment	Version	Action
Pricing Exception Request Demo Site Applications - Pricing Craig Paterson Jul 21, 2025		Commercial Operations-Awaiting A...	3	2	⋮
Pricing Exception Request Demo Site Applications - Pricing Craig Paterson Jul 21, 2025		Override (no step)-Completed	3	3	⋮
Pricing Exception Request AB Demo Site Applications - Pricing Craig Paterson Jul 17, 2025	0	Commercial Finance-Awaiting Appr...	3	3	⋮
Pricing Exception Request Demo Site Applications - Pricing Craig Paterson Jul 16, 2025	0	Override (no step)-Aborted	3	3	⋮
Pricing Exception Request Demo Site Applications - Pricing Craig Paterson Jun 16, 2025		Regional MD-Completed	2	2	⋮
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jun 13, 2025	Downloaded ...	MD Regional-Awaiting Approval	1	1	⋮

+ Create Application

Settings 9.4.1

# It is that simple ...



# and everyone is happy!