TRELLO TUTORIAL

What is Trello?

I like to think of Trello as **digital post it notes!** Post it notes that you can move around, color code, add comments to, assign to particular team members, and set calendar reminders for, to name a few!

Trello makes it easier for teams to manage projects and tasks. It is the visual tool that empowers your team to manage any type of project, workflow, or task tracking. Add files, checklists, or even automation: Customize it all for how your team works best.

COMPONENTS

Trello is made up on 4 main components:

- Workspaces
- Boards
- Lists
- Cards

And the bonus, 5th component is the Board Menu!

Start in a Workspace

A Workspace is where your Boards are sorted, more on Boards below. You can think of the Workspace as an umbrella that helps group similar Boards together.

Limits in the Free version

- You can only create a new Workspace from the desktop version which can be a little annoying while on the go.
- You only get 10 Boards per Workspace in the free version. I work around this limitation by setting up multiple Workspaces.

What is a Board?

A Board represents a place to keep track of information — often for large projects, teams, or workflows. Whether you are launching a new website, tracking sales, or planning your next office party, a Trello Board is the place to organize tasks, all the little details, and most importantly—collaborate with your colleagues.

What is a List?

Lists keep Cards, or specific tasks or pieces of information, organized in their various stages of progress. Lists can be used to create a workflow where Cards are moved across each step in the process from start to finish, or simply act as a place to keep track of ideas and information.

There’s no limit to the number of Lists you can add to a Board, and they can be arranged and titled however you’d like.

What is a Card?

The smallest, but most detailed unit of a Board is a Card. Cards are used to represent tasks and ideas. A Card can be something that needs to get done, like a blog post to be written, or something that needs to be remembered, like company vacation policies. Just click “Add a Card…” at the bottom of any List to create a new Card, and give it a name like “Hire a new marketing manager” or “Write a blog post.”

Cards can be customized to hold a wide variety of useful information by clicking on them. Drag and drop Cards across Lists to show progress. There’s no limit to the number of Cards you can add to a Board.

What is the Board Menu?

On the right side of your Trello Board is the Menu —the mission control center for your Board. The Menu is where you manage members' Board permissions, control settings, search Cards, enable Power-Ups, and create automations. You can also see all of the activity that has taken place on a Board in the Menu’s activity feed. Take some time to check out everything the Menu has to offer.

WORKFLOW

Create a Board

Structuring a project with all the members, ideas, tasks, and due dates and optimizing it for team collaboration can be overwhelming. Thankfully, you can get a fresh start with a Trello Board where you can organize everything to meet your needs and be successful.

- From the team’s Workspace tab, click “Create new Board” or click the plus button (+) in the Trello header directly to the left of your name, and select “Create Board”.
- Name the Board to represent whatever you are working on, from organizing an event or managing a blog, to tracking sales leads or launching a new product.

Your project data and information are your most valuable assets. As you work through creating a new Trello Board, you will have options for adjusting your privacy settings.

- When you are creating a Board, the default setting is ‘Workspace Visible’ which means any members of that Workspace can view, join, and edit Cards.
- If you change your settings to Private, only members of that specific Board can see it. Typically, you want to default to Private if you are working on a more restrictive project and do not want other team members to access it. It is great for 1:1 Boards, personal to do's Boards or Boards shared with customers.

- Public Boards allow anyone with the link to the Board to see it. Public Boards are ranked on search engines such as Google, meaning that any information on this specific Board will be accessible to anyone on the internet. This setting can be used for a public project or for a product roadmap that is open to public feedback. Just like other Board settings, you can granularly choose who can comment, add or remove members, and edit and join the Board.

Customize your Board

No two workflows are alike, so why not give each Board a unique look and feel? In the spirit of fun and flexibility, you can customize your Board background to reflect your team's unique personality.

From the Board Menu you can select a background color or image from the extensive image database. If you are a visual person, changing the background can make finding the Board in your Workspace easier.

You can change a Board background at any time from the Board's Menu.

Start collaborating

Whether a member is in charge of a project or only checks in occasionally for project status updates, ensuring all team members are on the same page results in a better project collaboration experience.

Invite members to the Board so that they can be assigned to tasks and collaborate on the Board.

1. From the top of the Board, click "Invite" and select a member of your team to add to your Board, or invite members by their email address or name.
2. At the bottom of the Invite menu you can get an easy-to-share invite link to your Board at the bottom of the Invite menu. Drop the special link in a Slack channel or email it to external stakeholders to start collaborating. To be even fancier, you can download a QR code for people to scan to invite them to your Board.

Set member permissions

Set member permissions to define roles transparently. Member permissions gives you granular control to give the right access to the right person. Become familiar with the following user settings to make sure the right information can be controlled by the right people:

Normal: can view and edit Cards, they can also edit some Board permissions depending on what settings you put together. Great for Workspace members actively working on a project.

Admin: can view and edit Cards, remove members and change all the settings of the Board. Great for project leaders or managers who have full control over the project.

*Observer** can access content displayed on a Board, they can't edit Cards but you can allow them to comment, emoji react and engage to the level you define with the Board. Great for

Boards you want to inform people on such as clients, managers, third party, etc. Not available in the free version.

Build a workflow

Lists in Trello help you organize your Cards by status. They can represent different things like a collection of ideas or tasks within a larger project. However, whether it's basic Kanban, a sales pipeline, a marketing calendar, or robust project management, what matters most is establishing a workflow for the way your team works.

1. Click "Add a List" to add your first List to your Board and title it to represent the stage or information that it will hold. List names can be as simple as steps like “To Do,” “Doing,” and “Done” or as detailed as needed for the work you are doing. Remember: Trello is truly customizable to your unique needs so just go ahead and name your Lists anything you like!
2. Add as many Lists to your Board as you need to build out a workflow.

Add tasks and to-dos

As a fundamental unit of a Board, Cards are used to represent tasks and ideas. It can be used for something that needs to get done like a customer support issue, a new design, a blog post, or something project-related that you need to be reminded of.

Cards can be customized to hold a wide variety of useful information by clicking on them. Drag and drop Cards across Lists to show progress. There's no limit to the number of Cards you can add to a Board.

1. Add Cards for each task that needs to be completed by clicking “Add A Card” in the first List. Keep Card titles short to make it easier to scan and see the status of each Card on the Board.
2. So that everyone has a clear understanding of what needs to get done, click on Cards to add more information such as:

- Descriptions
- Due dates
- Members
- Checklists
- Attachments
- Comments

Get Specific On The Card Back

As mentioned earlier, you can click on a Card to expand it and add and access more details. This is the “card back” and it is where you can get more specific with your information.

It has three main sections worth getting to know:

A. Card Descriptions: When your team is communicating daily, you need the ability to add and understand context. With the right information, you can preface communication and help prevent any miscommunication related to your project. For members who aren't managing the board daily but need to check in regularly, this can be very helpful.

In the description field you can add more specific information about your Card such as links to websites or step by step instructions. To add details to your Card click "Edit the description" at the top of the card back. You can even format your text with Markdown.

B. Add: The "Add" section provides you with more tools for the back of a Card.

- Add Members to Cards to assign people to tasks, and easily see who is doing what and what still needs to get done.
- Add Checklists to Cards that require subtasks or have multiple steps to make sure nothing falls through the cracks. You can even copy checklists from other Cards on the board. For additional clarity and accountability, assign members and add due dates to checklist items with Advanced Checklists, available to Standard and Premium subscribers.
- Add a date to Cards to track deadlines, and Card members will receive a notification 24 hours before it's due. From the date menu, you can pick a start date and a due date to keep track of when projects and tasks begin and end. Once the tasks are completed, dates can be marked as done.
- Add Attachments from both your computer and many cloud storage services like Dropbox, Google Drive, Box, and OneDrive.
- Cover: Make your Board extra organized and visual. By adding covers and colors to your Cards you gain visual context and have the ability to provide additional callouts and details. Images that have been attached to the Card can be displayed on the front as full-sized covers, and you also have the ability to change the color of a Card.

C. Comments and Activity: Comments can be added to Cards when communicating and collaborating with team members, like giving feedback or updates. @ mention a member of your board or team in a comment and they will receive a notification in Trello. The activity feed is a timeline of all of the comments and actions on a Card.

ADD ONS AND HIGHLIGHTS

Email-To-Board

Each Board and each Card has a unique email address you can send emails to. For Boards, you'll find it under "email-to-board settings" in the Board Menu. For Cards, you'll find it in the "Share" button on the Card menu. Emails sent to the Board's unique email address will create a new Card in the designated List with the content of your email. Emails sent to the Card's unique email address will show up as a comment on that Card. Email to Card is not available in the free version.

Power Ups - Pretty Print

One of the limitations of the free version is the lack on built in printing ability. That is where power ups come in. Each Board can have 2 power ups added (in the free version). One I use often is Pretty Print. Pretty print allows you to select what parts of the Lists and Cards you want to print and will generate a print file for you. It does not allow you to manipulate that data however, so I often will copy and paste it into Word to make any edits before printing. This power up will also not include comments and checklists in the print file so those have to be added manually.

This can be a little annoying but if your team is all using Trello I have found the need to print an entire Board minimal.

Power Ups - Google Drive

With the Power Up you can link an entire Google Drive folder or a single file to a Card. These documents stay synced in real time and the document size is preserved.

Power Ups - One Drive

The One Drive Power Up works similar to the Google Drive Power Up but it only allows single file links.

Labels

Labels allow you to color code your Cards. Labels come preset with 6 different colors. You can add additional colors if needed and you can assign titles to each color. Some of the ways these titles can be used is to indicate different stages of completion of a task, to indicate a specific team member that is responsible for that Card, or to indicate which social media platform a graphic is designed for. Labels can also be customized with symbols by clicking on the "color-blind" friendly mode.

Copying and Moving Cards and Boards

Boards can be copied or moved to a new Workspace in the Board Menu. For Board types that I use often, I like to create "templates" and use the Board copying feature so I don't have to recreate the framework of the Board each time. For example, I plan a lot of events and every "event planning" Board has the same framework. So I have an Event Planning Template that I keep in another Workspace and when I need to set up a new event, I simply copy that Board to the appropriate Workspace and edit it as needed.

Cards can be moved to another List within the same Board by clicking and dragging to a new location. Cards can be copied and moved between Boards in the List controls in the card back.

Templates

In addition to self created templates, you also have access to a number of templates provided by Trello.

Sync in real time

One of my favorite features is that Trello syncs in real time across all devices. That means that the changes I make on my phone are immediately available on my tablet and my desktop.

Star a Board to bring it to the top

Every Board has the ability to be “starred”. This brings it to the top of the list so the Boards that are regularly accessed are easy to get to with minimal scrolling, which is particularly helpful if you have a lot of Boards to sort through. I use this to keep the current event planning Board at the top of the list and my running task lists.

Non-Profit discount - 75% off list price

I have never used the paid version of Trello but there are discounts available for Non-Profits.