

A Beginner's Guide to Getting Started with Trello

GoSkills online course syllabus

Skill level

Beginner

Lessons

19

Pre-requisites

No prior experience needed

Video duration

55m

Estimated study time

55m 36s

Instructor

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Introduction

1 Intro to Trello

Trello is a digital whiteboard with supercharged sticky notes and is a great system to organize everything from projects, tasks, contacts, workflows, and more.

Create A Digital Whiteboard

2 Creating a Trello account

Before starting the adventure of freeing up brain space, you'll need an account.

3 Components of a board

A board is the component that houses all your items in one place.

4 Board configuration

Collaborating with others on your board saves time from meetings and emails that could have been status updates, and styling your board makes it feel more enticing and personal.

5 Ideal board structure

Sometimes you'll keep all your cards in one board, and sometimes you'll want to move cards between multiple boards.

Sort Cards With Lists

6 Setting up lists

Lists represent stages in your workflow (or categories for your cards) and are easy to customize and adjust.

7 Creating your first card

The core element of your Trello boards is the "card"—your supercharged sticky note.

8

List options

Lists provide several ways to perform actions to multiple cards at once. After this lesson, you'll be able to save time sorting your board.

Supercharged Sticky Notes

9

Assigning members

Assigning members makes it visually clear who owns a task while allowing you to filter views by owner and get notifications.

10

Creating labels

Labels give you more ways to view your cards and even allow you to zoom into specific information.

11

Adding dates

Adding dates to a card allows you to view it in a calendar view and sends you reminders when a due date is approaching.

12

Powerful filters

Filters let you see the most relevant information on a board at any given moment.

13

Creating checklists

Checklists are a way to break your card into smaller items, such as subtasks and quality checks.

14

Adding attachments

Trello is a great home to store everything you need about a task or contact in one place.

15

Adding custom fields

Custom fields provide flexibility to sort and organize any additional types of info in your card, letting you store more data in Trello that you can view on the front of the card (or inside the card only if you prefer).

Adding Power-Ups

16

Adding integrations to Trello

There are hundreds of Power-Ups for connecting Trello to other tools you use, or providing more functionality, views, or reports.

17

Must-have power-ups

Since there are hundreds of Trello Power-Ups it might feel overwhelming knowing where to start.

18 Understanding pricing

Trello offers multiple pricing plans which offer a variety of options but can make it challenging to know exactly what you need.

Conclusion

19 Bringing it all together

Thank you for watching this course!

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