

Instructions for using Trello to manage projects and life

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Using it is much easier than you imagine and it can really be used for almost every project. How does it work? What can you do with it? Where should you start? The tutorial in this article about Trello will help you understand the basic structure, how to navigate, and of course how useful it will be for you.

Instructions for using Trello to manage projects and life

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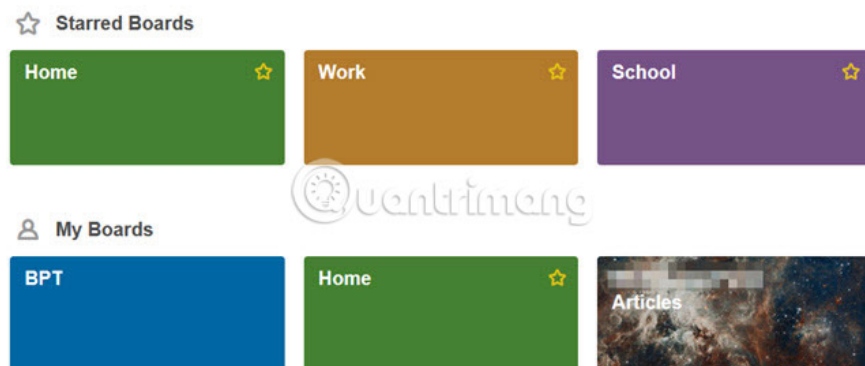
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Basic structure

Trello consists of **boards** , **lists** and **cards** (cards) in a completely organized package.

The board

Boards are placed on the main part called Boards Page, containing lists and cards. You can create different boards for work, school and home. Or if you only use Trello for school, for example, you can create one board for each class. Think of the board as projects with all the relevant parts within them.

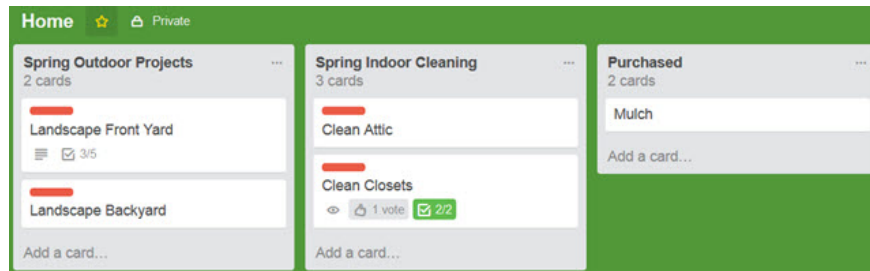


Lists

Lists are the main parts of the board and contain cards. You should start by creating your lists, which include the main parts of the project. For example, a board for an English class may contain homework lists, semester exams and group exercises. Another example, a free writing board can contain a list of article ideas, submitted articles and published articles.

Cards

Cards are details in the list. Using the above example for English class, the homework list can contain cards for each homework. For the list of board article ideas about free writing, you can use each idea for a separate card.



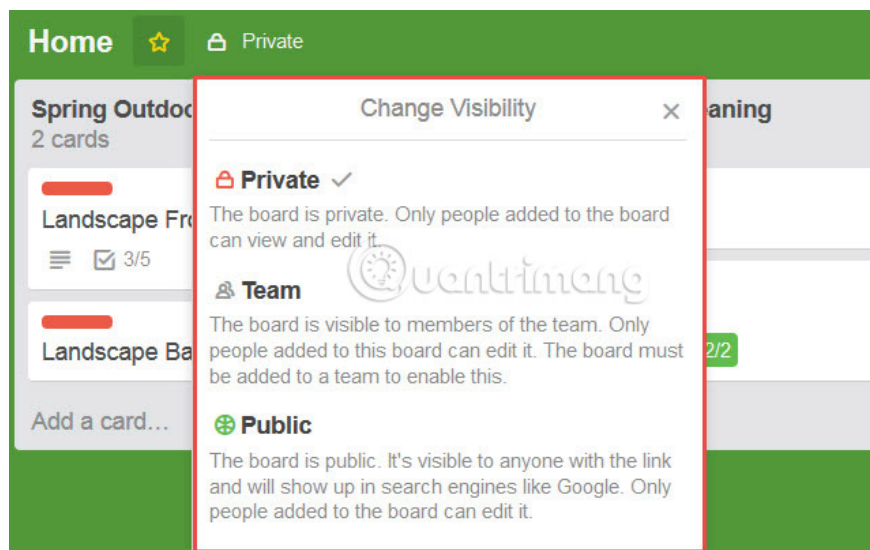
Details about the board

Each board has features to display and customize.

Show and access

Trello provides three forms of board access for users, each with a specific purpose.

1. **Private** means that only those who have access to the board can view and edit it.
2. **Team** means that team members can see the board and only those added to the group can edit it.
3. **Public** means that anyone who has a link to the board can view and find the board in the search engine results. However, the board can only be edited by those added.

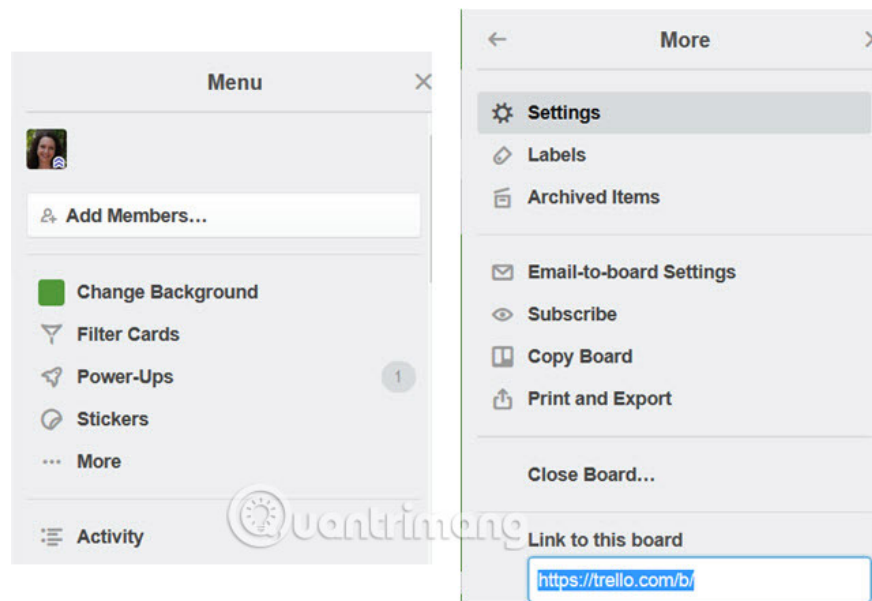


Custom options

The board has 5 main features to customize the interface. They can be accessed from the board menu.

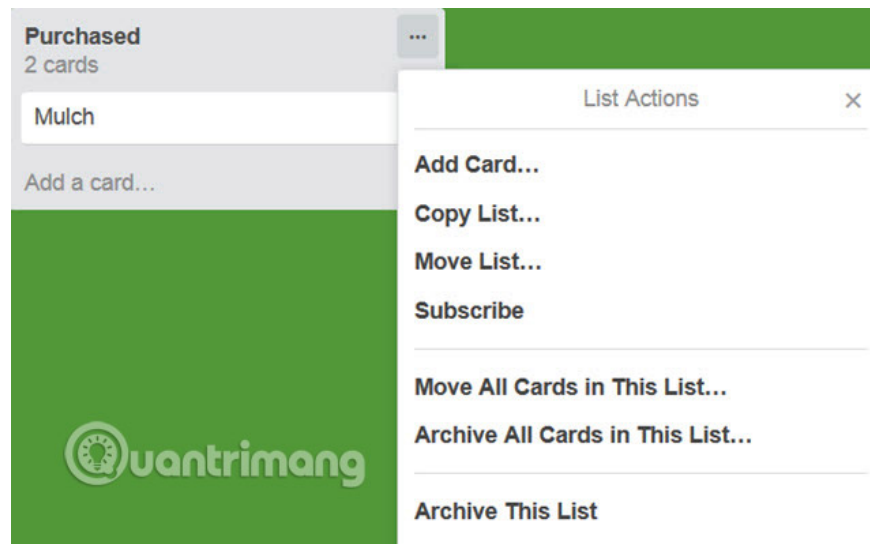
1. **Change Background** includes 9 different colors to change the background.
2. **Filter Cards** option allows you to see all similar cards based on keywords, labels, people or dates.
3. **Power-Ups** are additional utilities that may be included such as calendar, card time and voting capabilities.
4. **Stickers** are interesting utilities that can be dragged and dropped into the card in the board. There are 12 different options.

5. The link titled **More** in the menu has its own set of options for viewing permission settings, labels, archived items, email settings, and the ability to copy, print, export and subscribe. You can close the table, as well as copy the link provided to share the table.



Details of the list

Features and options for the list are very basic. You can add, copy, move, register and store lists by selecting **More Options** (three dots icon) next to the name of the list. You can also move or store all the cards in the list. Think of the lists in Trello as the task list and the cards are the tasks in it.

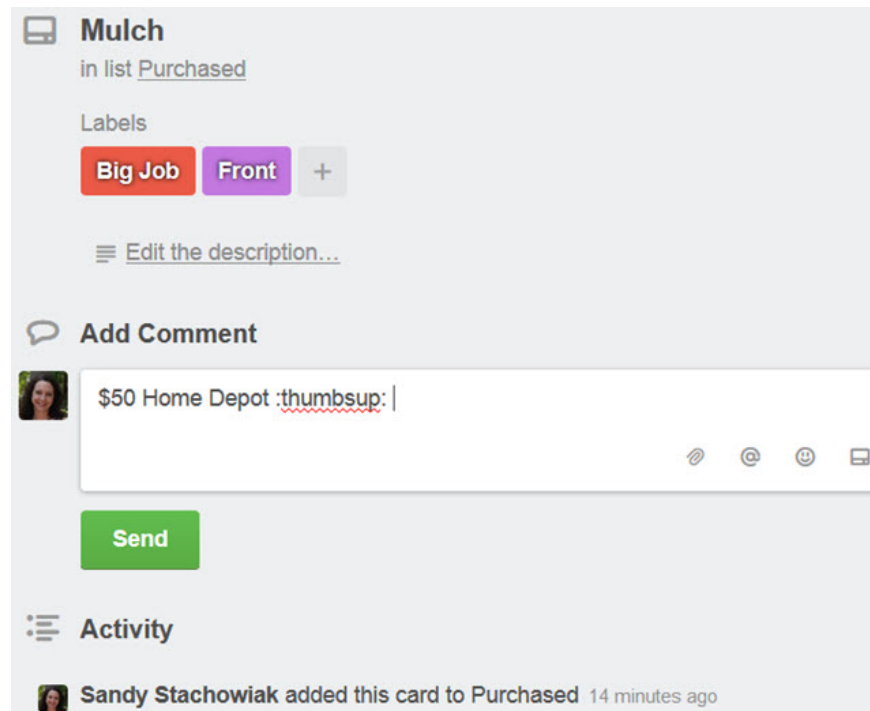


Card details

Card so far has the most number of features and options. This is because they include all the extended details. Think of them as items to do, keep all the information in a task list.

Comments and Activity

Both **Comments** and **Activity** can be viewed immediately on the main part when a card is opened. Each card can be added to the comment. These comments may in fact include attachments, referring to team members, emoticons and other cards embedded in it. Activity section shows exactly that, every action that has been taken on the card is recorded along with the date, time and person performing the action.



Add Section

The right side of the card contains a list of 5 items that can be added to the card for more details.

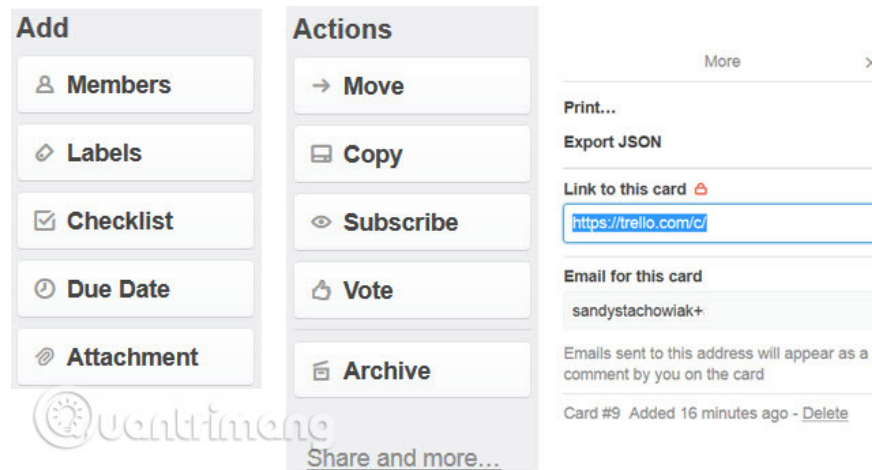
1. **Members** allow you to add existing group members to the card.
2. **Labels** allow you to add one or more labels to the card. It works similar to tags. You can search, select or create new labels. Labels can include titles and colors to make organization easier.
3. **Checklist** allows you to add handy checklists with the option to copy from one card to another. Or, you just need to create a new checklist and start adding items to that list. Then, when the items in the list are marked off, the progress bar along with the completed percentage is displayed.
4. **Due Date** allows you to select the date and time for the card.
5. **Attachment** allows you to select files to include in the card. These options include files saved locally in your computer or a file from Google Drive, Dropbox, Box or OneDrive. A link can also be attached to the card.

Action section

Under the **Add section section** is the **Action** area , including 5 options.

1. **Move** allows you to move the card to another board or to another list, along with an option to select its location in that list.

2. **Copy** allows you to copy the card and set another title. It has the option to keep the attached items like **checklist, sticker or label** . Then you select the board or list where you want to copy and if you select a list, you can choose its location like the **Move** option .
3. **Subscribe** allows you to register a card to receive notifications of activity on that card.
4. **Vote** allows you to vote for the card. This can be useful in teamwork environments.
5. **Archive** allows you to move the card to the storage board or simply delete the card.
6. **Share and More** in the **Action** section allows you to print, export, email or link to the card.



Web navigation

After logging into Trello, you will see all your boards. The boards you starred as favorites will be at the top.

Top Navigation

Move from left to right on top of this screen, you will have many different options.



Drawer Boards (Button)

The **Boards** button is called a **Drawer** and a box will display a list of your boards along with a search option. This button is still in the Top navigation to quickly switch to other boards.

Search Box

This keyword search box will search for the word or phrase you entered, on all items in the board and card.

Trello button

You can click on the central Trello button to return to the main screen at any time, then view all your boards. It will redirect you to the **Boards Page** , just like after you log in.

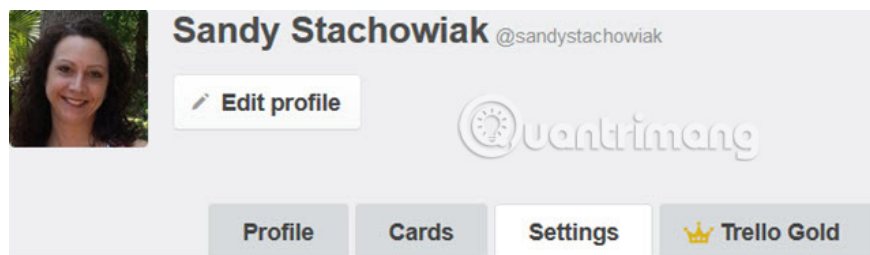
Plus button

This button allows you to quickly create tables, groups of individuals or business groups.

Your Name button

Clicking on the button with your name on it will open features that allow you to manage your Trello account. A box showing 6 options along with a link to log out. Even if you choose **Profile**, **Cards** or **Settings**, you will be taken to the same basic screen, where those three options are displayed as tabs on the top. Useful options for **Shortcuts**, **Help** and **Change Language** are also placed in this area.

1. **The profile** allows you to view all your activities, with direct links to the boards and cards where the activity takes place.
2. **Cards** allow you to see all the cards you have added and they can be arranged by board or due date.
3. **Settings** allow you to change your name, abbreviation, profile, avatar or password. You can add new email addresses, adjust email and on-screen notifications, turn on the help feature and see all the apps you have connected to Trello, along with options to revoke them. You also have the option to turn on two-factor authentication to improve security.
4. The **Trello Gold** tab will provide your account information, if you are a member or allow you to register to receive additional benefits.



Account Details

[Change Name, Initials, or Bio](#)

[Change Avatar](#)

[Change Password](#)

[Change Language...](#)

Information button

Information icons button can be selected to receive tips directly from Trello. If you click on one of these tips, you will be redirected to that section on Trello's website.

Notification button

This area will display all the notifications you have received.

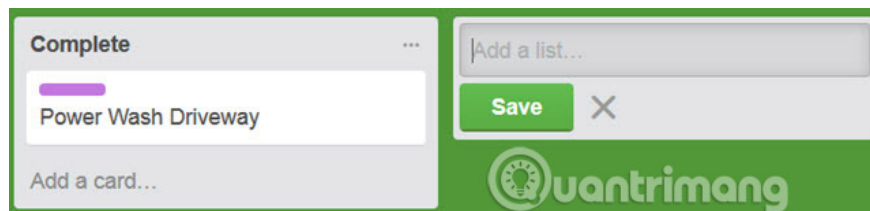
Navigate the board

Once you have chosen a board to work, navigating it is also very simple. You will see all your lists with the cards contained within them in a nice screen for the overall project.

You will also notice that the Top navigation remains and includes another bar directly below. From left to right, the navigation bar on this board allows you to change board names, starred on favorite boards, adjust display mode and access the board menu. If filtering is enabled, you will also see that label.

Add a List

You will always see the **Add a List option** inside your board, to the right of your current list. Just click inside the box, name your new list and click the **Save** button .

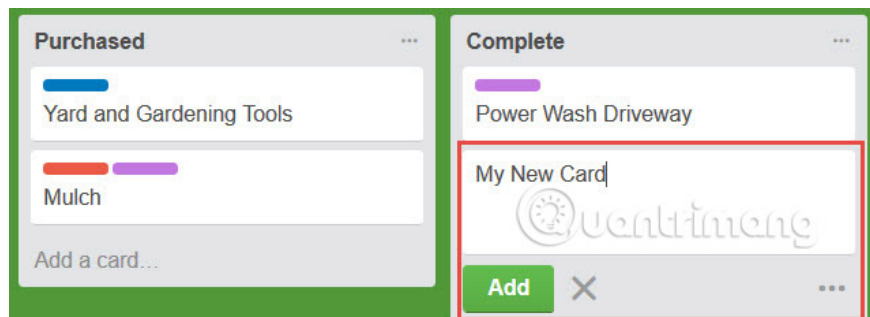


Move lists and cards

Trello provides a nice and simple interface to move lists and cards. Just move the mouse to the item you want to move and when the hand icon appears, click and drag it. You can rearrange the list or move the card from one list to another easily.

Open or add card

You can open a card in the list by clicking **Add a Card** at the bottom of the list. To create a new card, simply name it and click **Add**. All additions and actions to the card can be configured later. This is a handy feature that allows you to flip through the entire project before going into details.



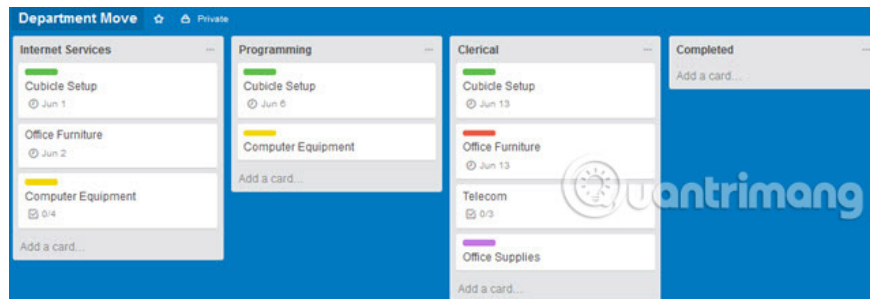
Examples of using Trello

Trello is a great tool for managing projects at work, school, personal, family and even financial planning. These are just a few examples of how you can use Trello to manage such projects.

Task

While it is clear that Trello can help project managers at work, it can be used in almost every job situation, for different types of activities and projects. This example will plan to move a part from one building to another.

1. Create a board for moving parts.
2. In the board, create lists for parts of the department: **Internet Services, Programming, Clerical and Completed** .
3. In the list, create a card for the activities that take place in each section. Internet Services may contain cards for setting up cabinets, office furniture and computer equipment. Clerical can contain cards for setting cabinets, office furniture, telecommunications and office supplies.
4. In each card, add all the details. Internet Services Computer Cards may include a checklist with screens, desktops, cables and printers. Clerical cards for telecommunications may include the introduction of new phone lines, the purchase of new phones and the testing of phone extensions.
5. When each card is completed in its current list, it can be transferred to Completed items. In this way, there is always a clear view of what still needs to be done and what has been completed.

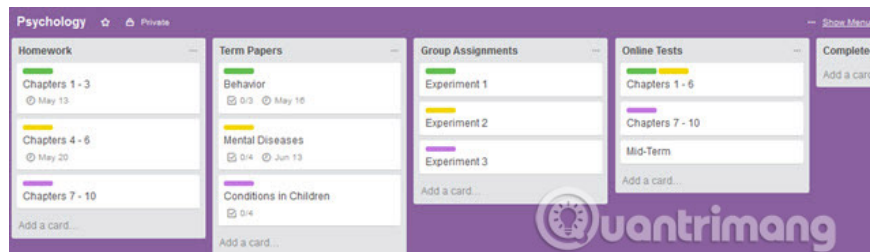


Schools

This example will talk about a full-time college student. This is a way this student can use Trello to arrange his semester.

1. Create a board for each class: **Math, English, Psychology and Nutrition** .
2. In each board, create lists for all class activities. Math can contain lists of **Homework, Group Assignments, Online Tests and Completed items** . However, Psychology may also contain similar Homework, Group Assignments, Online Tests and Completed items.
3. In the list, create a card for each exercise or item. List Homework in Math board can contain **Week cards 1, Week 2 and Week 3** . List Homework in the Psychology board may include cards for each thematic article such as behavior, mental illness, child status.
4. In each card, add all the details. Card Week 1 in the list of Math Homework may include only one checklist for the due dates. However, the list of Psychology Term Paper about mental illness can contain checklists for written parts, due dates, reference links, photos and attachments for drafts.

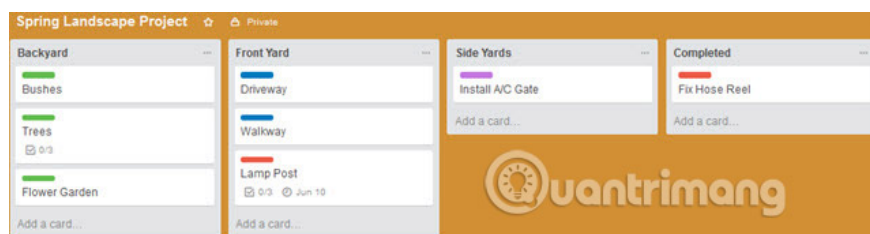
- When each card is completed in its current list, it can be transferred to the Completed items list. In this way, this student always has a clear view of what has been done and what has not yet been completed.



At home

Trello can be a useful tool to keep home projects streamlined. This example will refer to a landscape decoration project for spring.

- Create a board for landscape decoration project for spring.
- In the board, create a list for all actions in the project. You can create list **Backyard**, **Front Yard**, **Side Yards** and **Completed tasks**.
- In the list, create a card for each item. Backyard can contain **Bushes**, **Trees** and **Flower garden** cards. Front Yard can contain **Card bushes**, **Trees** and **Flower garden**.
- In each card, add all the details. Card Trees in the Backyard list may include a checklist of tree pruning estimates, a trimmer, a trimming day planner. The Lamp post card in the Front Yard list can contain a checklist that includes painting, installing a motion sensor and buying light bulbs. But, it may also include a family member to perform the job as well as a completed day.
- When each card is completed in its current list, it can be transferred to the Completed tasks list. In this way, you always have a clear view of the remaining work and completed work.

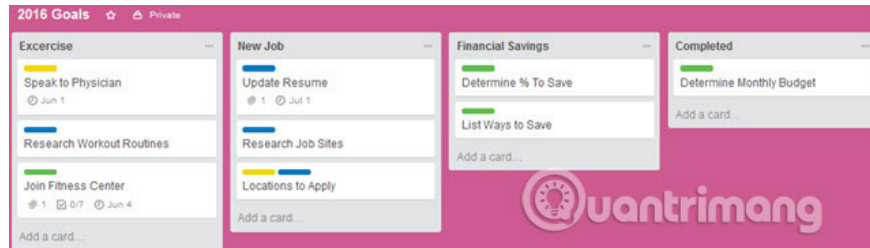


Personal

You may not think about Trello as a personal management tool, but it can certainly be used for your personal projects and goals. This example will talk about using Trello to manage goals for the year.

- Create a board for the current year.
- In the board, create a list for each goal. You can have lists of **Exercise**, **New Job**, **Financial Savings** and **Completed tasks**.
- In the list, create a card for each item. Exercise can have **Speak** cards for **physicians**, **Research workout routines** and **Join a fitness center**. New Job can have **Resume** cards, **Job websites** and **Locations to apply**.

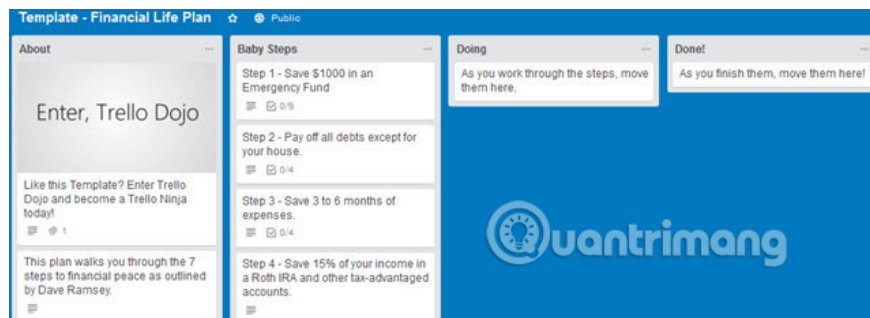
- In each card, add all the details. The Join a fitness card in the Exercise list can include links to relevant websites for the gym close to home, budget details and checklists to call for fitness centers. Card Resume in the New Job list may include due dates, continue to improve drafts and a link to continue writing web pages.
- When each card is completed in its current list, it can be transferred to the Completed tasks list. In this way, you will be able to see exactly when the goals for the year will be completed.



Finance

To plan the financial aspects of your life from college to retirement, Trello can be a useful tool. To help you get started, Trello offers a financial planning form.

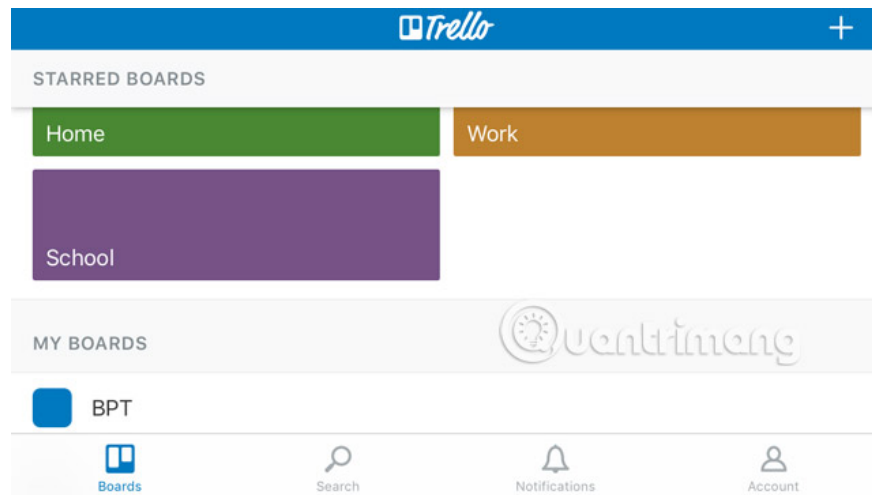
- Handy templates include lists for **Baby Steps, Doing** and **Done**. However, you can use your own list if you like. You may want to create a list for saving your child for college, your own retirement plan and paying your current credit cards.
- Using the provided form, you can quickly review the steps to take to help you achieve your goals. The first step is the first card and includes saving \$ 1,000 for an emergency fund. The second step, also the second card: Pay all debts, except mortgage. These cards are in the list of Baby Steps.
- In each card are editable items to suit your needs. The Emergency fund card has a checklist for actions to accomplish that goal. Paying off debt cards have checklists as well as specific amounts for each debt.
- When you work through each step in list Baby Steps, you can transfer them to list Doing. This way you know immediately what you are doing. Then, when they're done, move them to the Done list, so you can focus on unfinished items at a glance.



Availability of the application on the phone

Trello is available as a free version on mobile devices, to make it easier to keep track of projects and to get you informed on the go.

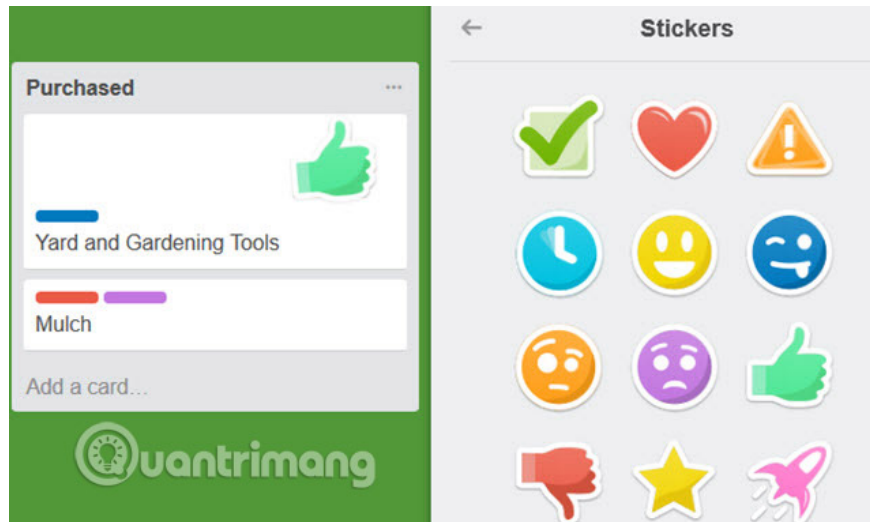
1. On Android, you can use Trello on your phone or tablet.
2. On iOS, you can use Trello on both iPhone and iPad.



Tips for using Trello for new users

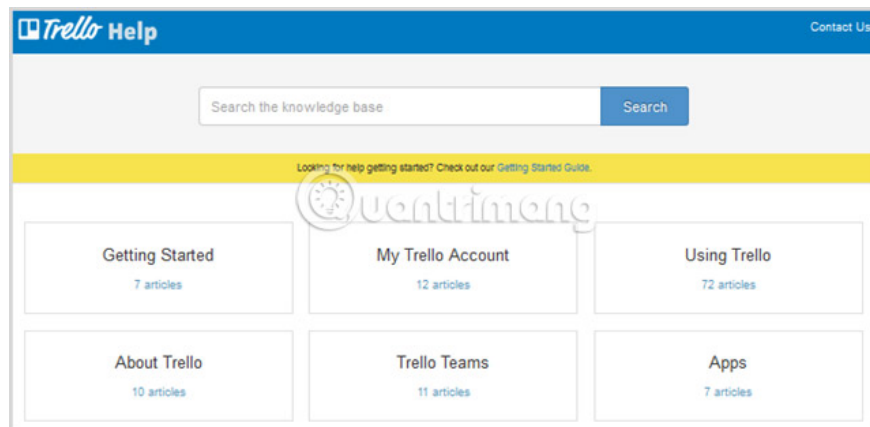
If you don't know anything about Trello and are ready to start using this tool, you don't have to go step by step. It may have extended features, but its ease of use will help you become professional immediately. Here are a few helpful tips for you:

1. **Start with a simple project or even a sample project** : Start with a small project consisting of only one or two lists and one or two cards. This will help you get used to navigation and features in Trello.
2. **Experiment with the features** : Trello has dozens of options. That doesn't mean you need to use all those options. Experiment with checklists and attachments to see if you really need them for your project.
3. **See Trello tips** : Trello is good at providing useful tips and you can discover something you love. So, click on the **Information** icon in your navigation bar, when you have time to explore a new item.
4. **Take advantage of reminders** , especially if you want to use Trello on your mobile device. This will keep you on track with your projects.
5. **Have fun with it and turn it into your own:** Trello has some great features to change the board's background color, which can include a neat sticker. Why not use these additional features to personalize your experience?

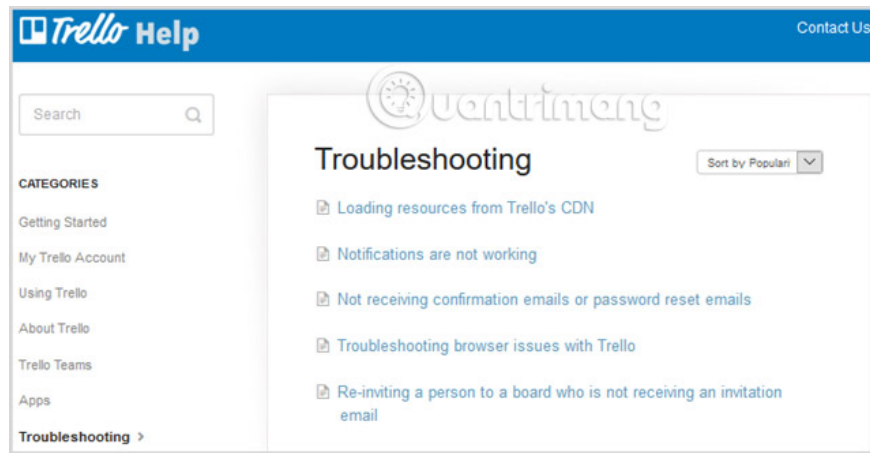


More help

One of Trello's great features is that it has an easy-to-access and informative **Help** section. To access this area, click the **Information** button in the **Top navigation** , select **More**, then select **Help**. This will take you to the Help section on the Trello website.



After that, you will see different categories to choose from, including **Getting Started**, **Using Trello** and **Troubleshooting** . You can also enter search terms at the top to access specific topics in the knowledge base.



Each section of the Help section provides you with useful articles and information. Items can be arranged for easier viewing and you have the option to print an article of your choice, by clicking on the print icon at the top of the page. If you still have problems, linking **Contact Us** at the top will allow you to send a message to the Trello development team.

As mentioned above, Trello can be a valuable tool for managing almost any project, large or small, business or personal. The ease of use, the availability of mobile apps as well as the extensive features make it a worthwhile tool to try.

Share your thoughts with us in the comment section below about experiencing Trello for the first time!

Good luck!

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2. Top 10 best DevOps tools
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