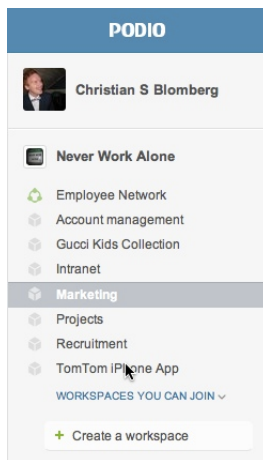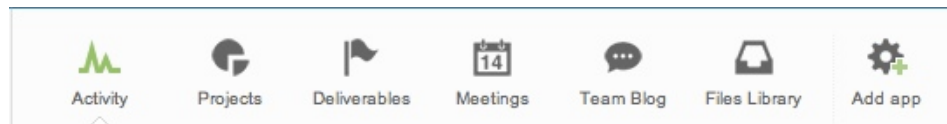# PODIO

Get started on Podio

Podio makes team collaboration a whole lot easier. No more long email treads, floating documents, information silos and duplicate work. Now your team can manage your work the way you want to, in one transparent place. This quick guide will take you through the most important aspects of Podio, showing you how it can help you and your team work more efficiently. To get the most out of this introduction, open your browser and log in to Podio, so you can follow each step.

The structure of Podio

In Podio you work in *workspaces* that belong to an *organization*. Just click one of the workspaces in the left hand side of your Podio to go to one of the workspaces that you are a member of. The *Employee Network* is the place to share all company-wide updates and news. If you'd like to create a new workspace for your team, click "create a workspace" in the bottom of the list. A workspace is a group of people that use similar tools to get their job done. You can set up workspaces for the *marketing* or *development* team, with a *customer* to manage a project, or for the internal *project management* team to manage your projects internally.

Use the right tool for your team

In the [Podio App Store](), you can choose between more than 600 different apps and app-packs to suit a wide range of your business needs, from project management, CRM and recruiting to swimming pool maintenance. You will find a link to the App Store at the bottom of the Podio home page.

For the purpose of illustration, we will use the [Project Collaboration app pack](). However, feel free to browse around the App Store to find the apps that make most sense for your team. Once you have found the app you want simply click Get app to add it to a workspace.
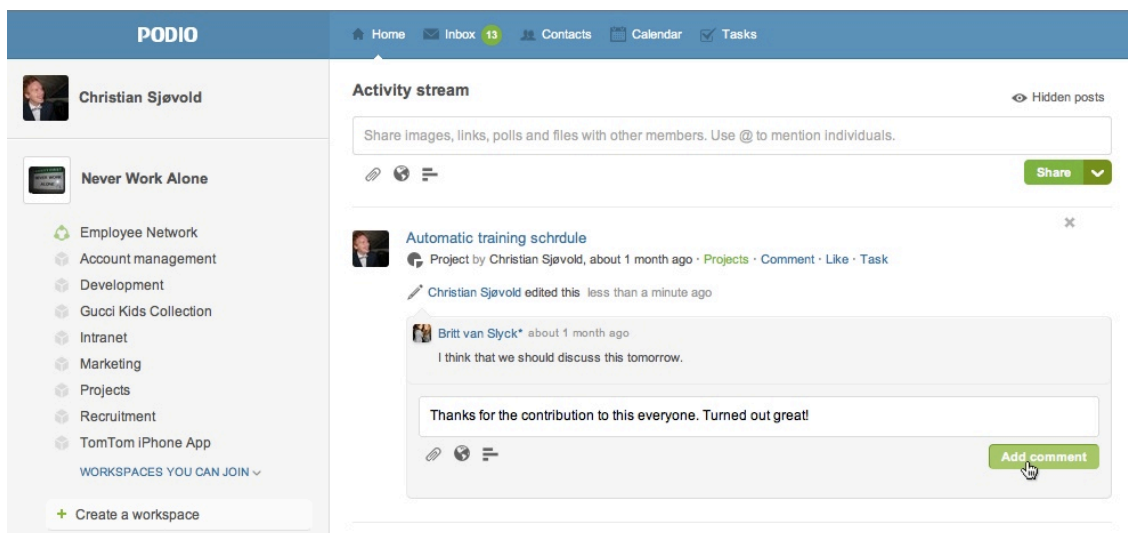
PODIO

Create and share your work in one go

Once you have added the right apps to your workspace, click the app you'd like to get started with in the app navigation and then the green "+New…" button to the right.
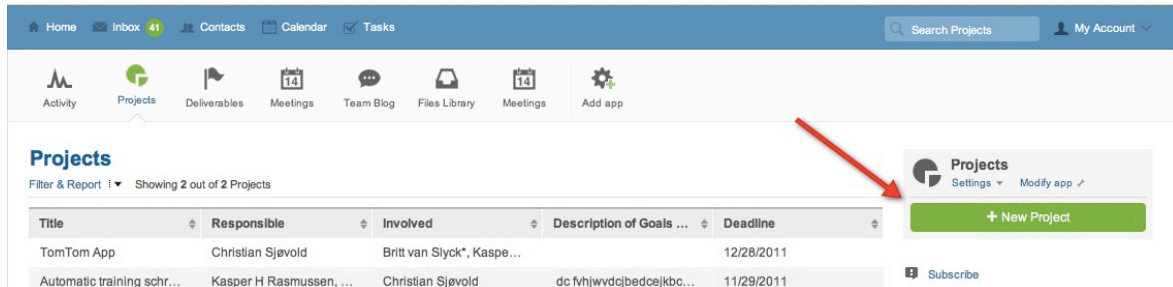

Fill out the required fields to create your new project and click *save*. Your Project has now been created in the app and is fed into the activity stream for your team to see. Go to the activity stream to check it out. Everyone can now interact on the project through comments, tasks, likes, or adding files directly from the activity stream.
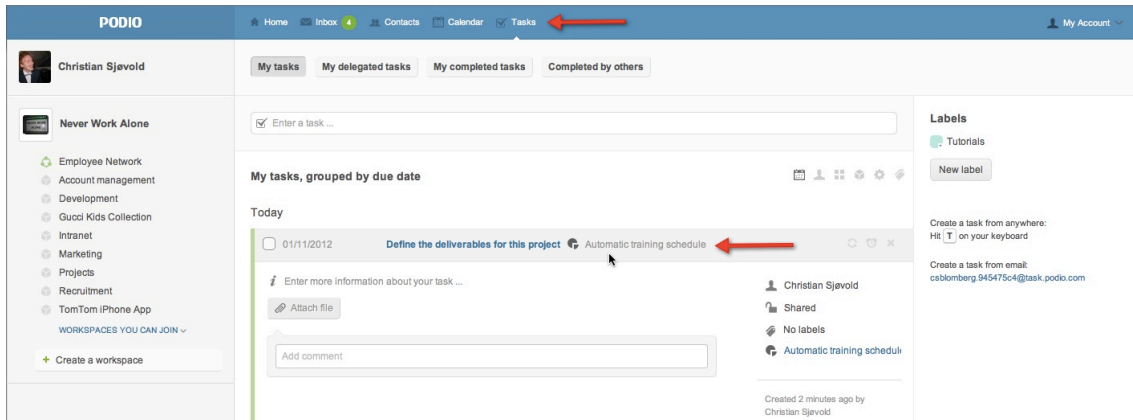
PODIO

Manage your tasks

You can assign tasks connected to what you are working on and assign it to yourself. Assigning a task in connection with a project (or a customer, design, candidate) you are working on, you ensure that the task keeps its context to the rest of your work.
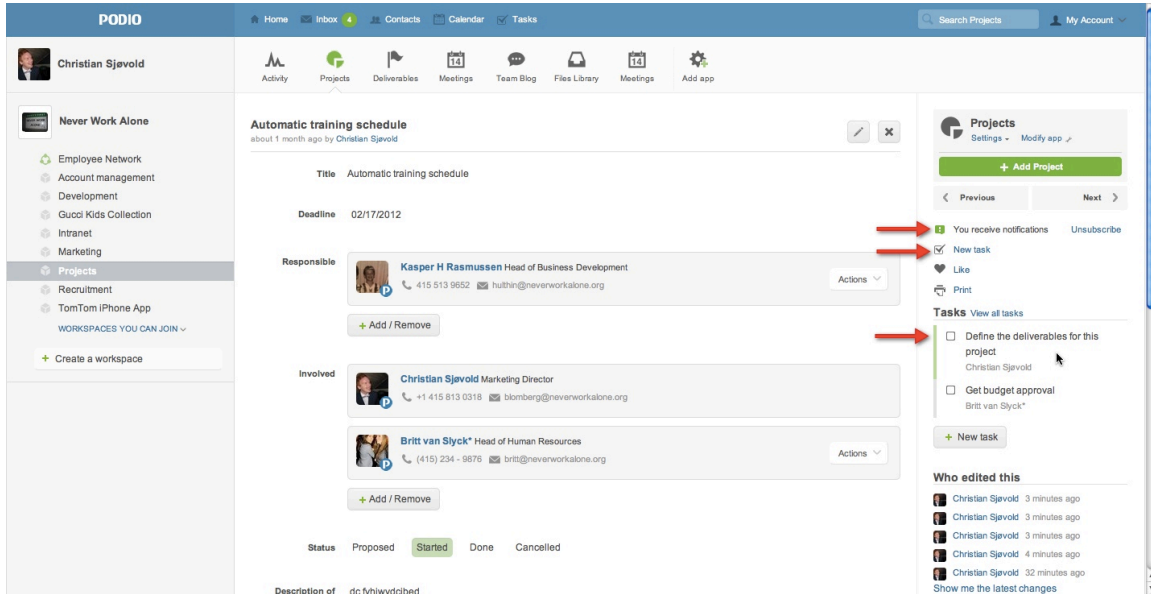

After having assigned the task to yourself, click on "Tasks" in the top blue bar. This takes you to the overview of all your tasks across your workspaces. You'll notice that the name of the project you just created appears after the title of the task. Click the project name and you are back at the project where the task appears in the right hand side. This connection makes task management in Podio very efficient.

PODIO

Get notified of what is going on.

You will automatically be notified in your inbox every time someone posts an update in one of your workspaces. Also, you automatically *subscribe* to everything you are involved in on Podio, which means that you'll never miss updates from your coworkers on these items. Click "Inbox" in the top blue bar to see all your notifications. If you get notifications that you find irrelevant, simply click "*stop notifying me*". This is also where you can decide which notifications you get an email about. Click on "*email settings*" above and select what the type of notifications you'd like to get emailed about.
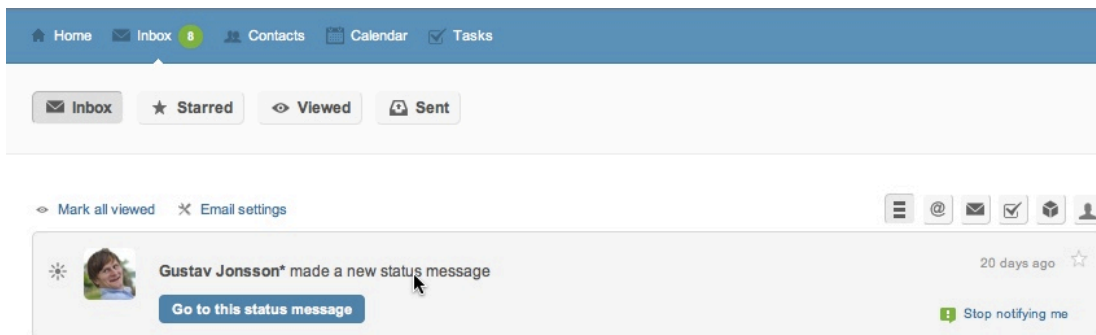
The same way you can *unsubscribe* (see top screenshot on the previous page) to items, you can proactively subscribe to apps or items to get notified. For example; if you'd like a notification every time a new project is created, go to that app and click "subscribe".
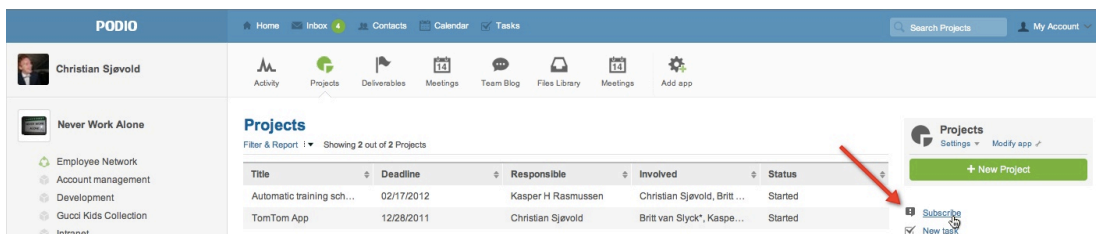

Share resources and updates with your team

Email was designed for one-to-one conversations bus is frequently being used for announcements and group conversations and it's just not great for that. Did you read an interesting article? Maybe you just closed a big sale? Share it with your coworkers in a social way, where people can choose to take part of the discussion/excitement and everyone sees what's being shared.

Try posting a status message in the stream for your co-workers. This could be something like "Hi guys, let's keep each other up to date here on everything that happens within the team!". You can
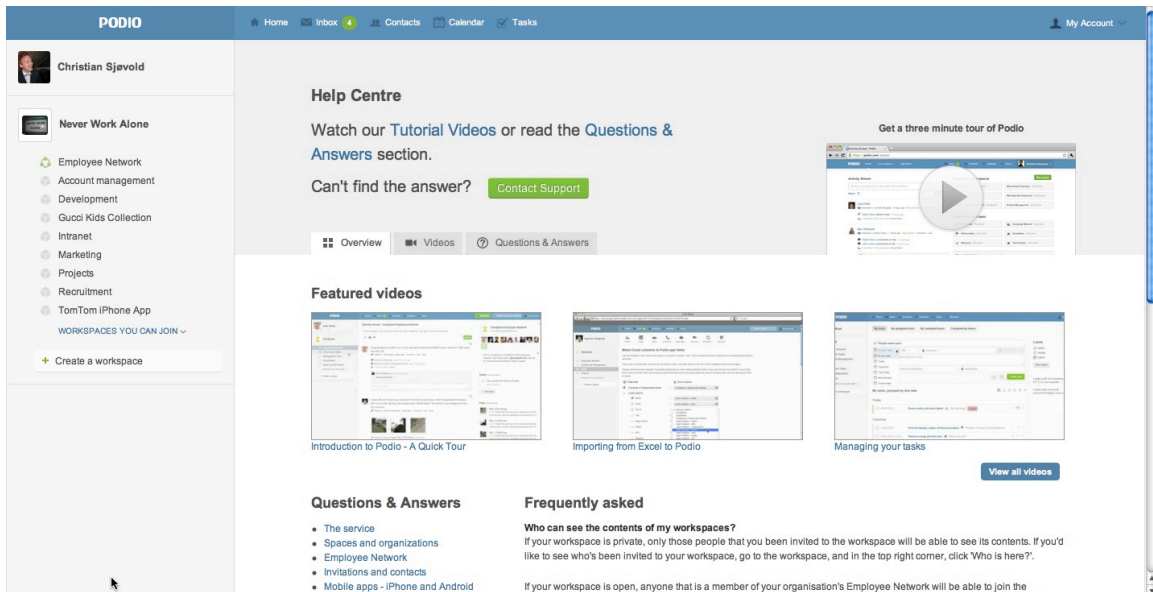
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even add links, files or questions. Your team members will get a notification and can decide if this is relevant to them. *Tip: click the small globe to add a link*.
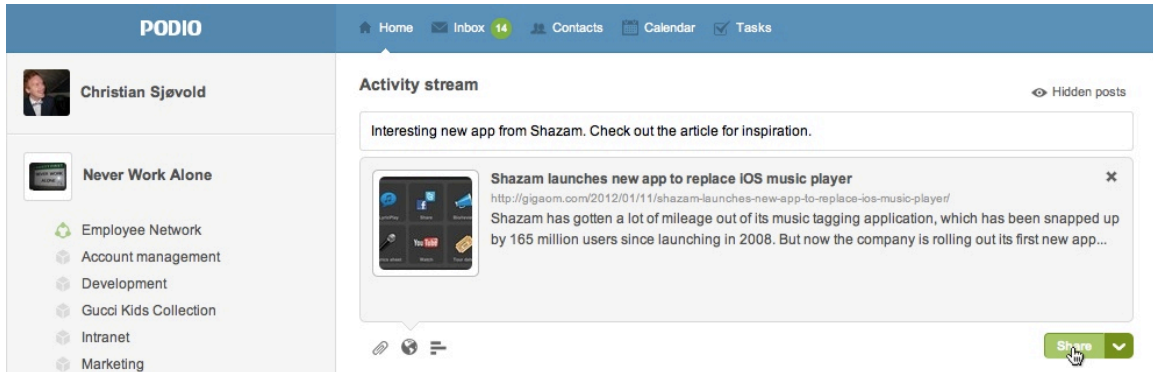
Need a helping hand?

If you ever need more help using Podio, you should check out the Help Center where you can find an FAQ, loads of helpful videos and contact Help & Support directly. You'll always find the link in the bottom left corner when logged in to Podio.

It's awesome that you've chosen to collaborate with your team on Podio and we are dedicated to making your experience as productive and pleasant as possible. Don't be a stranger! We are here to help you ☺

Help & Support

PODIO

Here's 4 quick steps to getting familiar with Podio

1: Update your profiles

When you log in to Podio with, using your company email address, click your name in the top left corner. This will take you to your personal stream. Look to the top left corner and hit the green button "**Edit Profile**". Upload a profile **picture**, add a few lines **about** yourself and your **contact details** and click "done".

Now your co-workers will know who you are and how to get in touch with you.

2: Set up your account

In the top right corner of Podio you will find "My account". Click it and select "Account settings". Here you should select the appropriate **time zone** and the **language** you prefer to use. You can also add other email addresses here or change your password if you'd like. Click the "notifications" button in the top. Here you can select what type of notifications you would like to get **emails** about and how you want to be **notified** in the browser. If you'd like to always have your **contacts** with you, click "external contacts management" and import them now.

All your deadlines, meetings and tasks will now appear in the right time and you will get notified exactly the way you like.

3: Post an update in the Employee Network

The Employee Network is the place to share updates that does not have a specific context. This could be a link to an interesting article, a note that you're getting in late today, or a poll on when to have the next get-together. Find the Employee Network in the left hand side and share an update.

4: Assign a task

Tasks in Podio are "to-do's". You can assign a task to yourself in order to remember to do something or to others to remind them. Click "tasks" in the top blue bar to go to your **task list**. Here you'll always get an overview of all your tasks and the tasks you have delegate to others. Create a task in the text bar to print your Podio Certificate, set the due date and assign it to me.