

# Module Seven



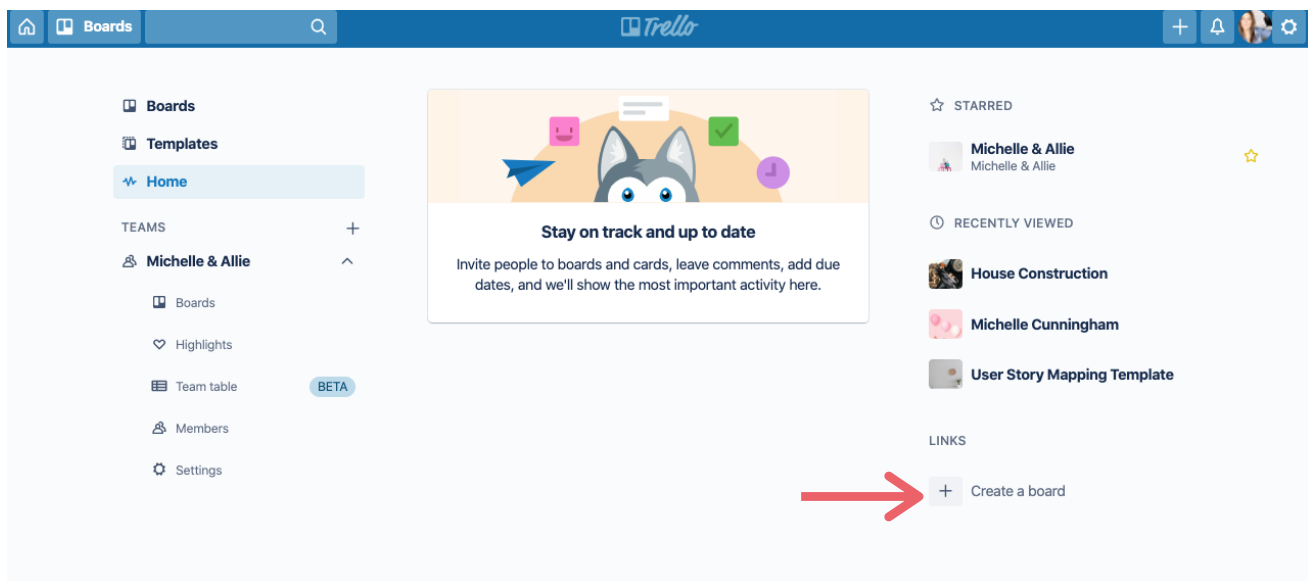
## Using Trello

Trello is great because it is FREE to use and it allows you to organize everything you need into different boards, cards, lists & even collaborate with anyone else with Trello.



Get started by going to [www.trello.com](http://www.trello.com) or going into your app store and downloading the app.

After you create an account and open the application, you will see your homepage where you can create your first board



Create Your First Board by clicking "Create Board"

In Trello, Boards are kind of like folders. Within each Board you can create lists. Within each list, you add cards.

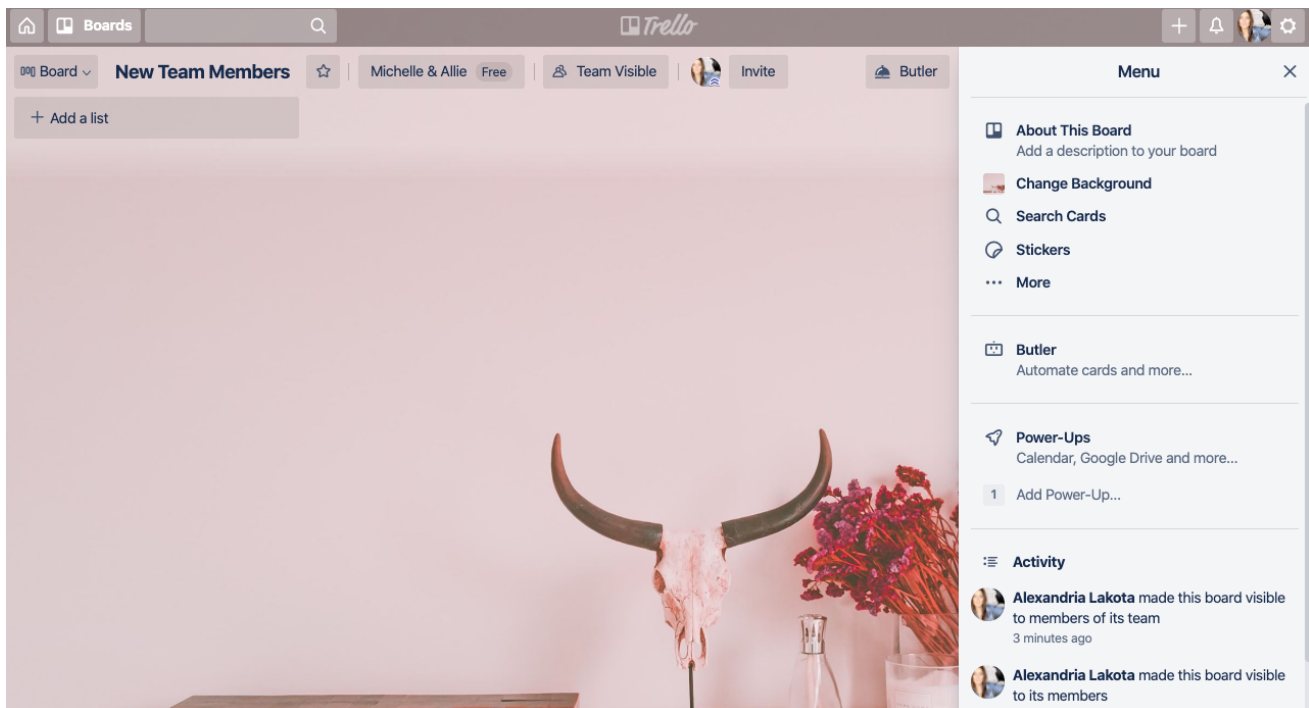
Within each card, you can add text, links, images, checklists, add members, etc.

## Using Trello

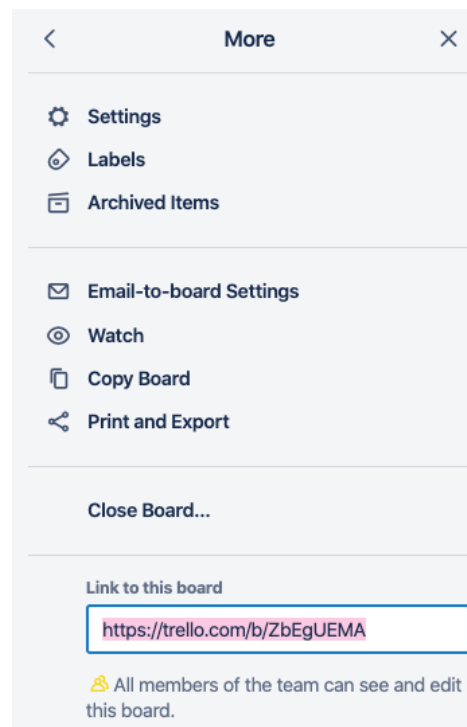
When you create a new board, you will have the option to make it private or part of a team if you have one.

Add the name and click "create"

Once you create the board you will see the side menu appear where you can change the background image, add members, add power-ups, and board activity.

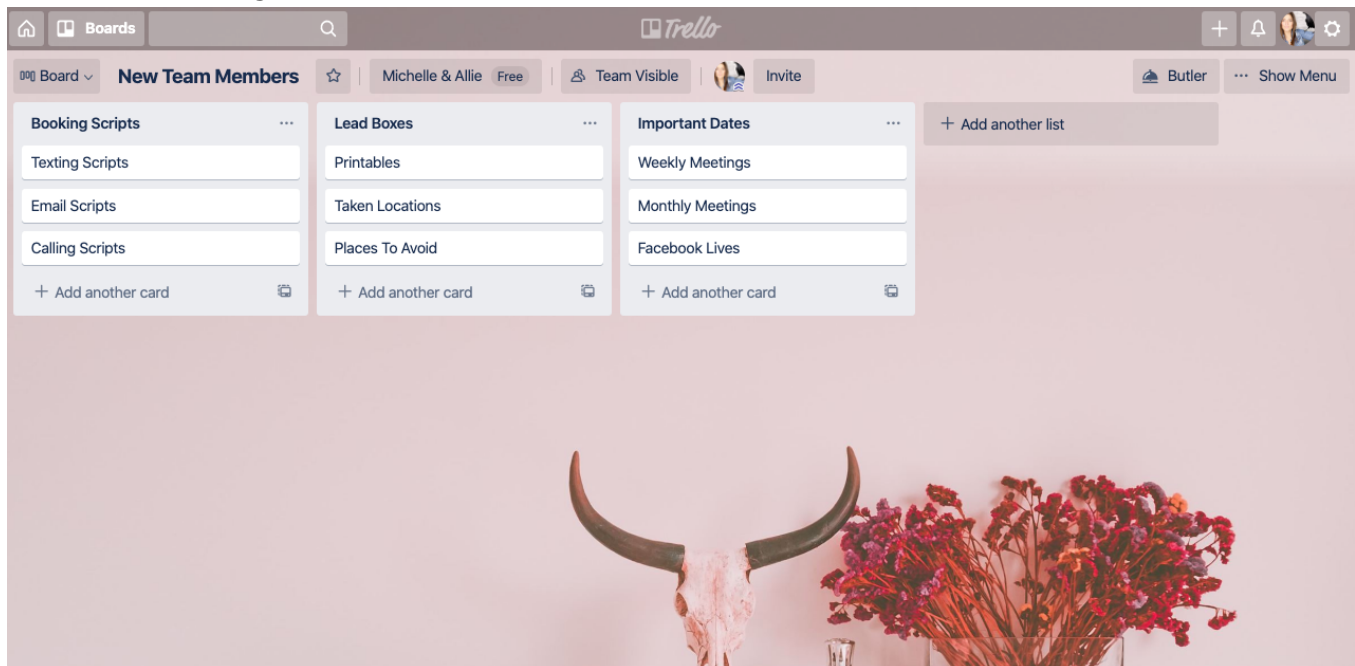


If you want to share the board with others, click "more" in the setting bar to find the link to the board.

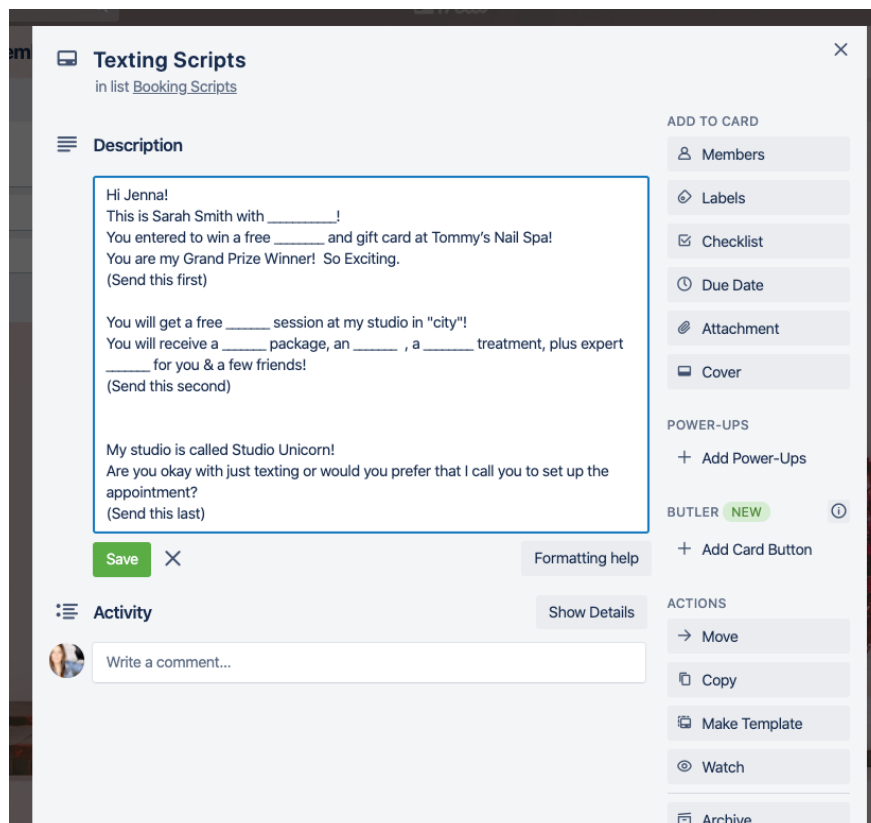


## Using Trello

How you organize and break down what you want to be a list, and the cards within in them is up to you, but below is an example of how you could break things down.

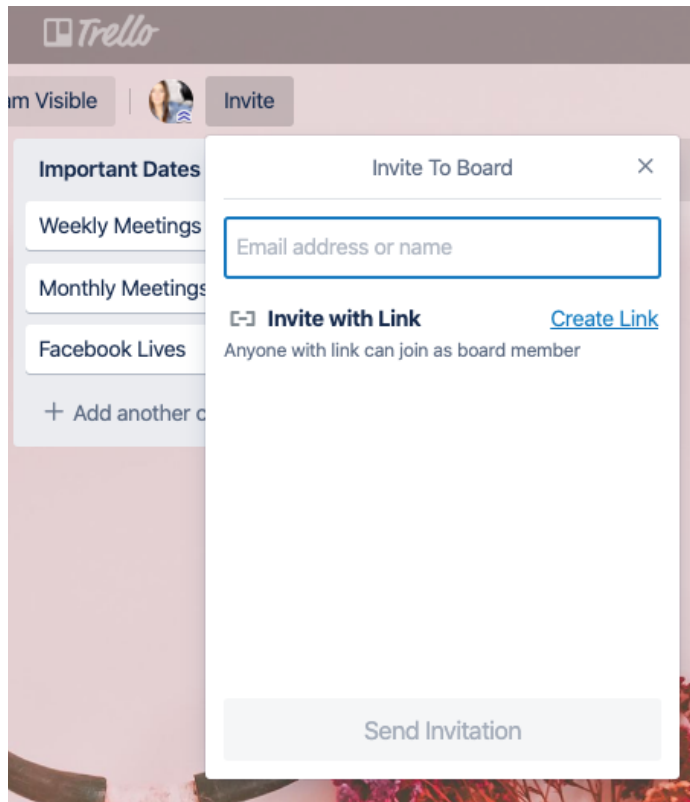


To add informations within each card, just click on that card and it will open. As you can see below, you can add as much text as you would like. Also, along the side, you can see the full list of other things you can add to each card.



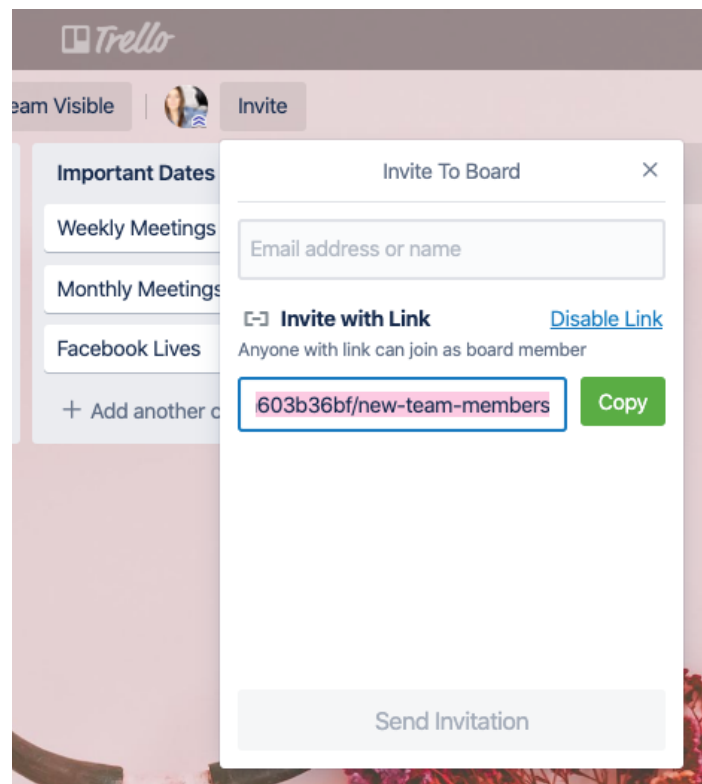
## Using Trello

To invite other Trello users to your board, click on the "invite" button at the top.



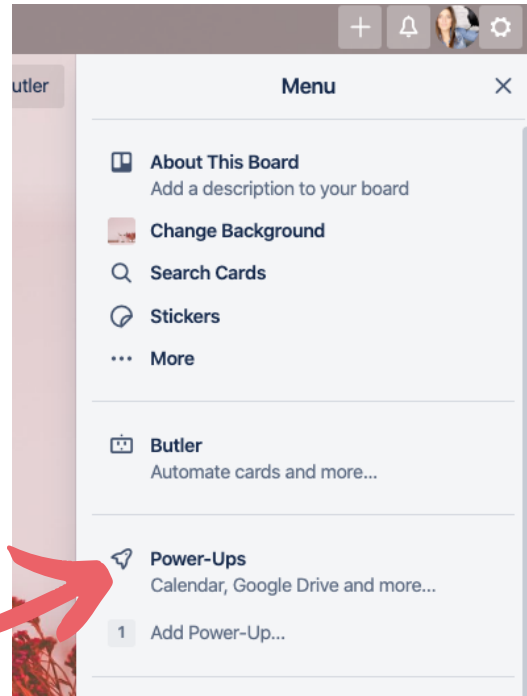
if you know their email, you can invite them directly.

if you don't know their email, you can click "Create Link" and it will create a link for you to copy and send to them .



# Using Trello

For more features, click the "Show Menu" at the top right and go down to the "Power-Ups"



You can add any or as many power-ups to your board depending on what would be beneficial to the purpose of your board.

## Power-Ups

Search

- ☆ Featured
- 🔔 Enabled
- 📌 Made by Trello
- 👑 Bonus  
Limitless Power-Ups
- Analytics & Reporting
- Automation
- Board Utilities
- Communication & Collaboration
- Developer Tools
- File Management
- HR & Operations
- IT & Project Management
- Marketing & Social Media
- Product & Design
- Sales & Support

**Daily Updates**

Yesterday  
Today  
Issues

**Daily Updates**

Add

Daily standup tool to sync your team by asking everyone what they did yesterday, today & issues they're facing

📌 1,000+

**Microsoft Teams**

Link Trello to Microsoft Teams to see your Trello boards, notifications, and more, in Microsoft Teams.

Add

📌 1,000+ 🏆 Bonus

**Proto.io**

Effectively communicate functionality by attaching interactive prototypes to your Trello cards.

Add

**Track your team's time in Trello**

**Time Tracking & Reporting**

Add

Track time by adding multiple work logs to each card with date, team member & hours spent. Create reports & export in Excel.

📌 5,000+ 🏆 Bonus

**Trello Annual Report 2020**

**Trello Annual Report by Blue Cat Reports**

Add

Just for fun! Get some stats on your teams work in 2020

📌 500+ 🏆 Bonus

**Wishlist**

Keep an overview and track future expenses: gifts, vacations, company purchases etc. All in one place with prices,...

Add

📌 100+

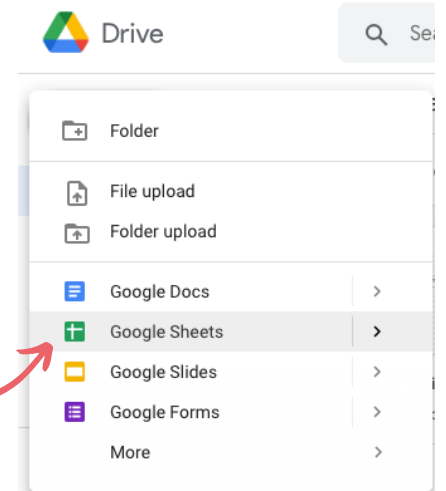
# Google Sheets

Google sheets is a great resource for organizing your contacts.

You can have one full master list or you can have multiple sheets that break down different contacts for different needs

To start, go to your Google Drive as shown in previous Modules.

Click the +New button at the top left and choose "Sheet



For Example:

Let's say you have a bunch of lead boxes out and you have a stack of lead slips.

If you use a texting app like skipio, you can upload contacts right from a csv file (spreadsheet) instead of manually entering each one.

	A	B	C	D	E	F
1	<b>First Name</b>	<b>Last Name</b>	<b>Phone Number</b>	<b>Email</b>	<b>Lead Box Location</b>	
2	Allie	Lakota	216-123-4567	email@email.com	Salad World	
3	Michelle	Cunningham	456-654-4567	email@email.com	PlayLand World	
4	Sally	Sue	134-432-9876	email@email.com	Pizza Palace	

You can even go a step further by adding additional sheets to THIS sheet without having to have a separate spreadsheet.

For Example:

You want the leads from each lead box location its own sheet, but you don't want to have to open 15 different files in your drive to access them.

Click the " + " at the bottom left and it will add a sheet.

Right click on the new sheet and click "Rename" to name it accordingly.

Now, when you need to access your leads, you can simply open your ONE main "Lead Box Leads" file and they are all in one place while still organized and broken down by location.

