



How-To Basics

- Hierarchy/Terms
- The ECR Mainframe
- How to Move to Other Workspaces
- Filter Your View
- Project Communication
- Assign a Custom Task
- Email Settings

How-To Advanced

- Create a Workspace
- Create an App
- Add a Workflow

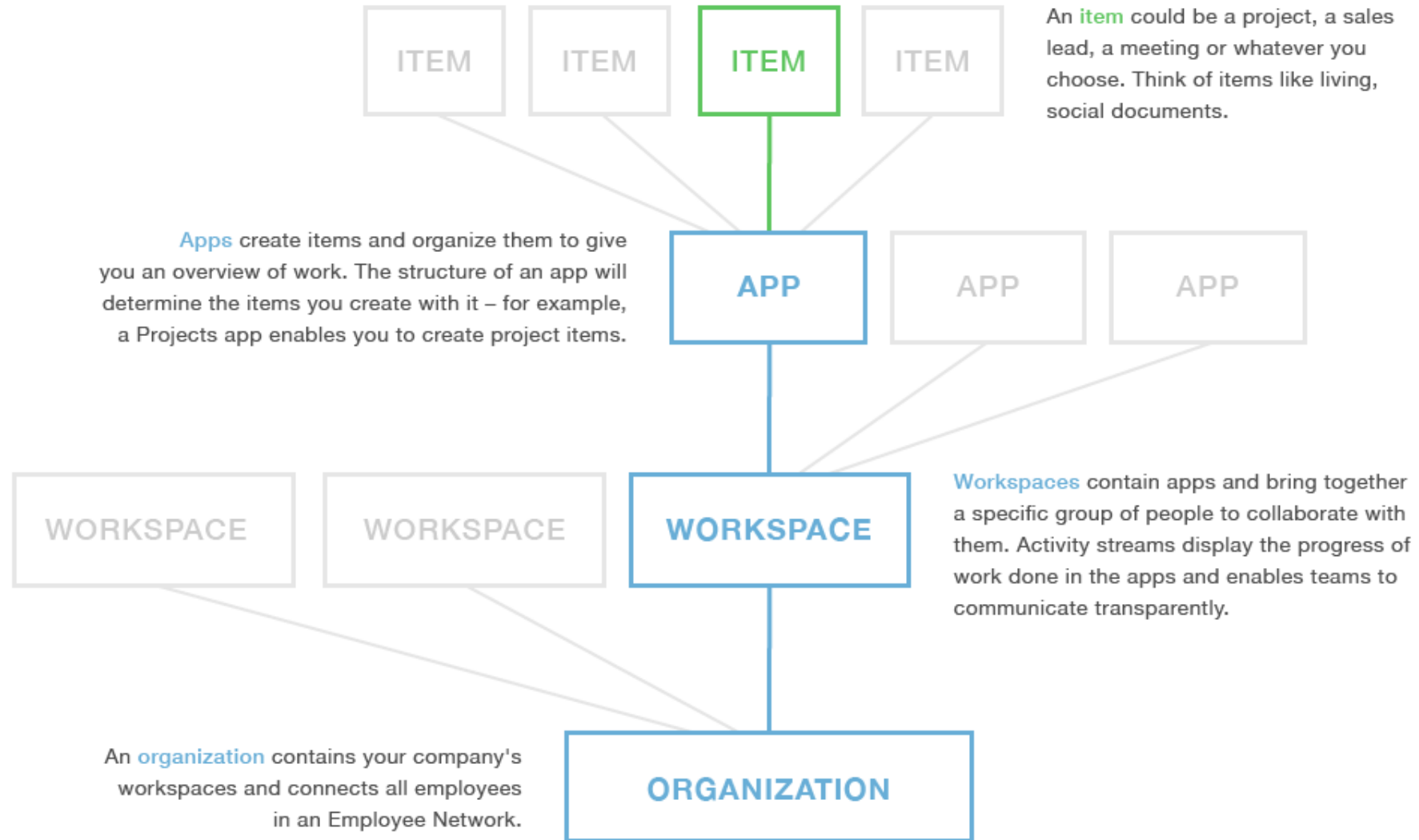


A How-To- Guide to Podio Basics

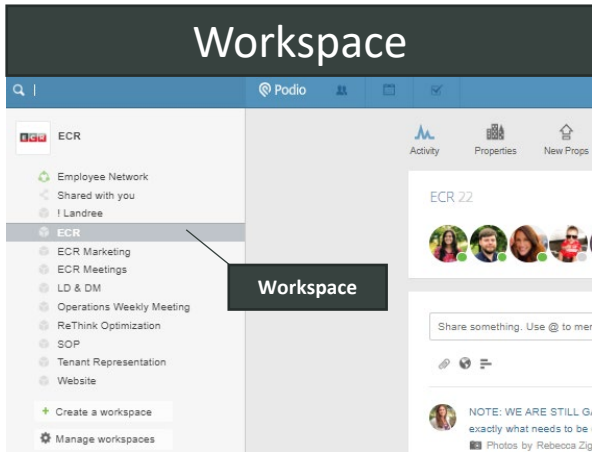
Updated 4/1/2020



Podio Structure



Podio Hierarchy



Workspace

ECR

- Employee Network
- Shared with you
- I Landree
- ECR
- ECR Marketing
- ECR Meetings
- LD & DM
- Operations Weekly Meeting
- ReThink Optimization
- SOP
- Tenant Representation
- Website

Create a workspace

Manage workspaces

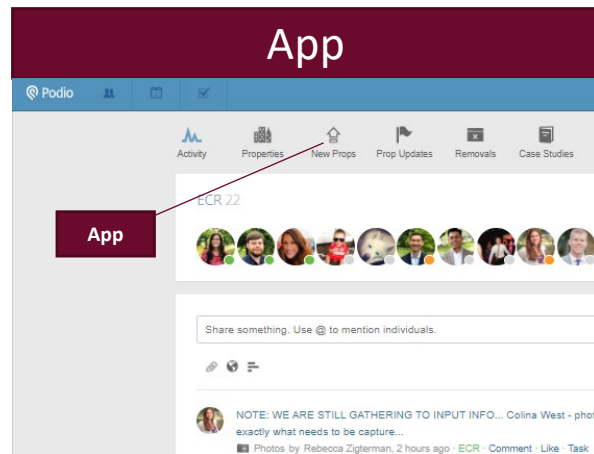
Activity Properties New Props

ECR 22

Share something. Use @ to mention individuals.

NOTE: WE ARE STILL GATHERING TO INPUT INFO... Colina West - photo exactly what needs to be capture... Photos by Rebecca Zigterman, 2 hours ago - ECR - Comment - Like - Task

Workspace



App

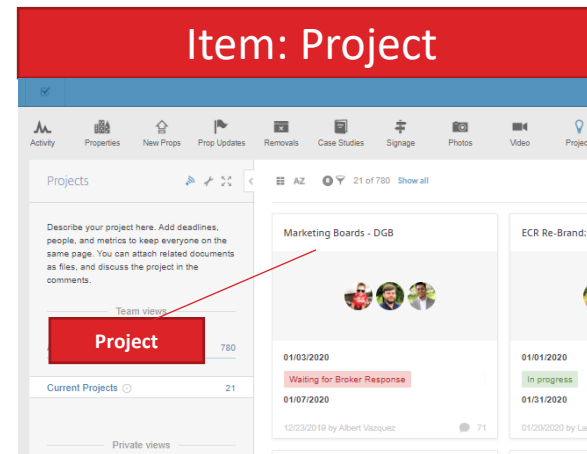
Activity Properties New Props Prop Updates Removals Case Studies

ECR 22

Share something. Use @ to mention individuals.

NOTE: WE ARE STILL GATHERING TO INPUT INFO... Colina West - photo exactly what needs to be capture... Photos by Rebecca Zigterman, 2 hours ago - ECR - Comment - Like - Task

App



Item: Project

Activity Properties New Props Prop Updates Removals Case Studies Signage Photos Video Projects

Projects

Describe your project here. Add deadlines, people, and metrics to keep everyone on the same page. You can attach related documents as files, and discuss the project in the comments.

Team views

Project 780

Current Projects 21

Private views

Marketing Boards - DGB

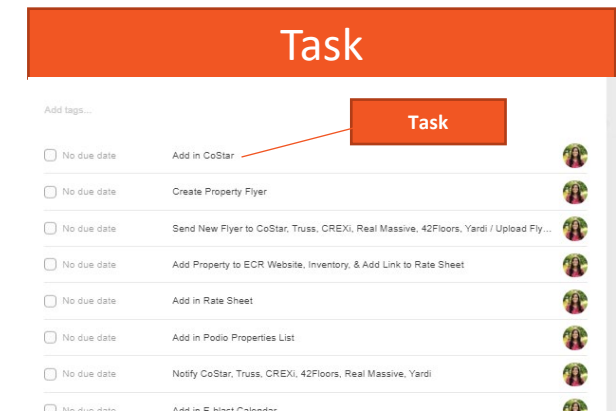
01/03/2020
Waiting for Broker Response

01/07/2020
12/23/2019 by Albert Vazquez 71

ECR Re-Brand: Pha

01/01/2020
in progress

01/31/2020
01/20/2020 by Landree



Task

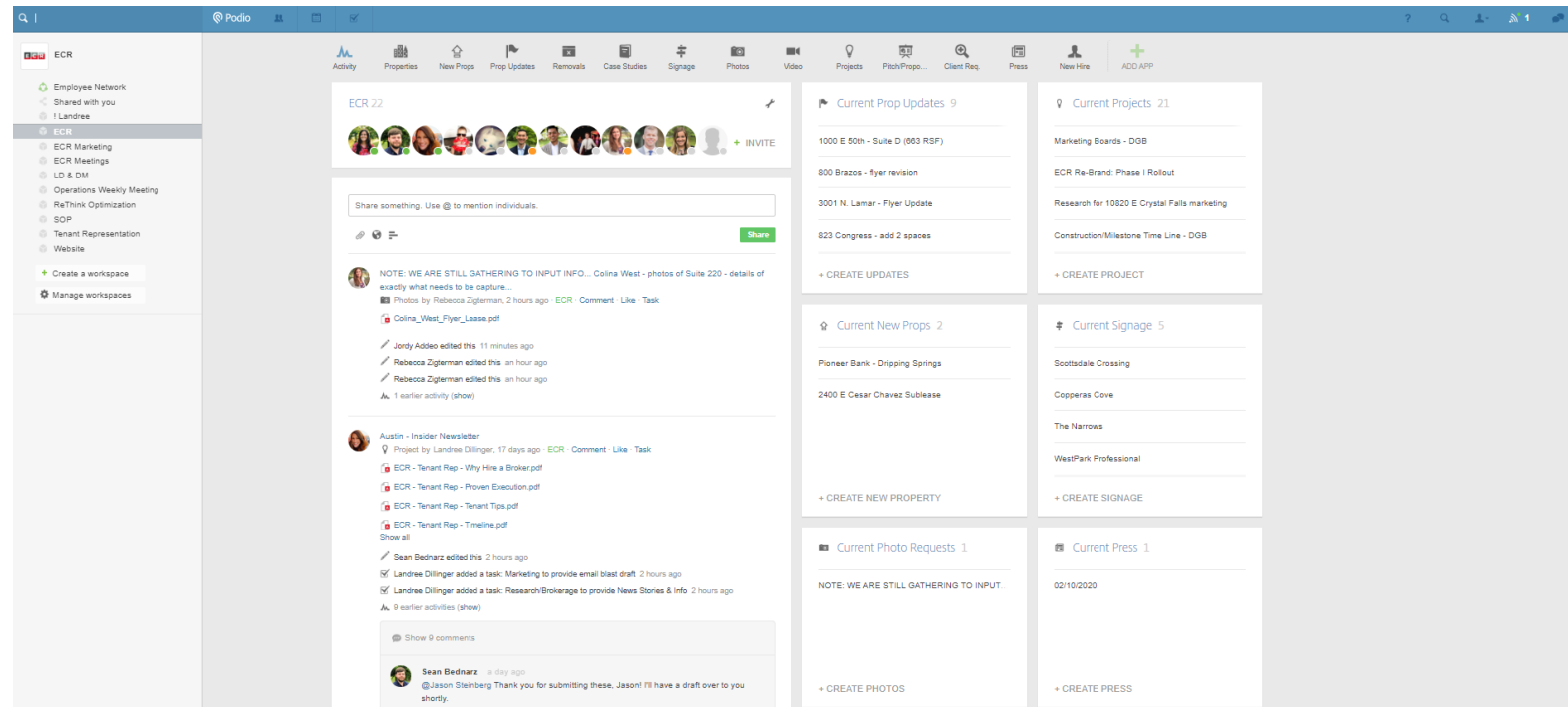
Add tags...

- No due date Add in CoStar **Task**
- No due date Create Property Flyer
- No due date Send New Flyer to CoStar, Truss, CREX, Real Massive, 42Floors, Yard / Upload Fly...
- No due date Add Property to ECR Website, Inventory, & Add Link to Rate Sheet
- No due date Add in Rate Sheet
- No due date Add in Podio Properties List
- No due date Notify CoStar, Truss, CREX, 42Floors, Real Massive, Yard
- No due date Add in E-Host Calendar

The Mainframe: “ECR” Workspace

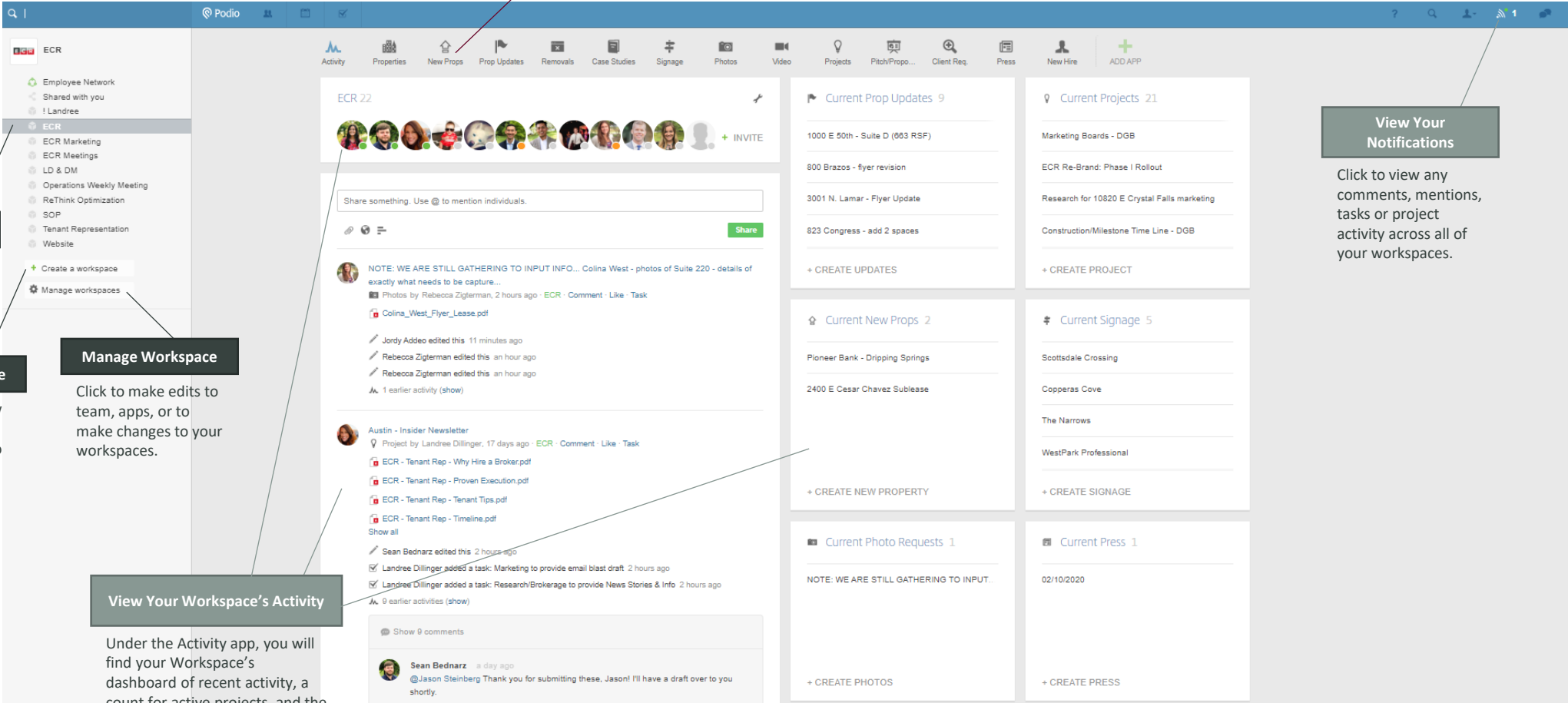
This is the HUB for all Marketing Requests:

- New Properties
- Property Updates
- Removals
- Case Studies
- Signage
- Photo Requests
- Video Requests
- Projects
- Pitch + Proposals
- Client Requirements
- Press Requests



ECR Workspace - Homepage

App



Workspace

Click to select the desired Workspace

Create a Workspace

Click to create a new workspace, select Team Members who will have access and create an apps.

Manage Workspace

Click to make edits to team, apps, or to make changes to your workspaces.

View Your Workspace's Activity

Under the Activity app, you will find your Workspace's dashboard of recent activity, a count for active projects, and the team members who have access to that Workspace.

View Your Notifications

Click to view any comments, mentions, tasks or project activity across all of your workspaces.

Move to Other Workspaces

Left Hamburger Menu will allow you to select other workspaces.

The screenshot displays the Podio workspace interface. At the top left, a blue header bar contains the text "ECR" and the Podio logo. Below the header is a navigation bar with icons for Activity, Properties, New Props, Prop Updates, Removals, Case Studies, Signage, Photos, Video, Projects, PitchPropo..., Client Req., Press, New Hire, and ADD APP. The main content area is divided into several sections. On the left, a dark grey box with the text "View All Workspaces" has a line pointing to a hamburger menu icon in the top left corner. A grey box with the text "See What Workspace You are Currently Viewing" points to the "ECR 22" workspace header. The main content area features a central activity feed with a text input field, a "Share" button, and several activity items. To the right, there are six cards representing different workspace categories: "Current Prop Updates 9", "Current Projects 21", "Current New Props 2", "Current Signage 5", "Current Photo Requests 1", and "Current Press 1". Each card lists items and includes a "+ CREATE" button.

View All Workspaces

Click the hamburger menu to toggle to a different Workspace

See What Workspace You are Currently Viewing

ECR 22

Share something. Use @ to mention individuals. **Share**

Bremond - show Suite 300 as divisible (no approval needed)
Updates by Rebecca Zigterman, 23 days ago - ECR - Comment - Like - Task

Jordy Addeo commented on this a few seconds ago
1 earlier activity (show)

Show 3 comments

Jordy Addeo 4 days ago
@Rebecca Zigterman is it showing now? Our costar contact said he fixed this last week. Thank you for updating the flyer, it looks great! @Jennifer James

Jordy Addeo a few seconds ago
@Rebecca Zigterman I have asked our costar contacts to update this a few times. If it is not showing the way you had in mind, I think we need the range of numbers. What is this suite divisible down to? Please let me know. Thank you! @Jennifer James

Add comment

NOTE: WE ARE STILL GATHERING TO INPUT INFO... Colina West - photos of Suite 220 - details of exactly what needs to be capture...
Photos by Rebecca Zigterman, 2 hours ago - ECR - Comment - Like - Task
Colina_West_Flyer_Lease.pdf

Jordy Addeo edited this 12 minutes ago
Rebecca Zigterman edited this an hour ago
Rebecca Zigterman edited this an hour ago
1 earlier activity (show)

Current Prop Updates 9

1000 E 50th - Suite D (883 RSF)

800 Brazos - flyer revision

3001 N. Lamar - Flyer Update

823 Congress - add 2 spaces

+ CREATE UPDATES

Current Projects 21

Marketing Boards - DGB

ECR Re-Brand: Phase I Rollout

Research for 10820 E Crystal Falls marketing

Construction/Milestone Time Line - DGB

+ CREATE PROJECT

Current New Props 2

Pioneer Bank - Dripping Springs

2400 E Cesar Chavez Sublease

+ CREATE NEW PROPERTY

Current Signage 5

Scottsdale Crossing

Copperas Cove

The Narrows

WestPark Professional

+ CREATE SIGNAGE

Current Photo Requests 1

NOTE: WE ARE STILL GATHERING TO INPUT.

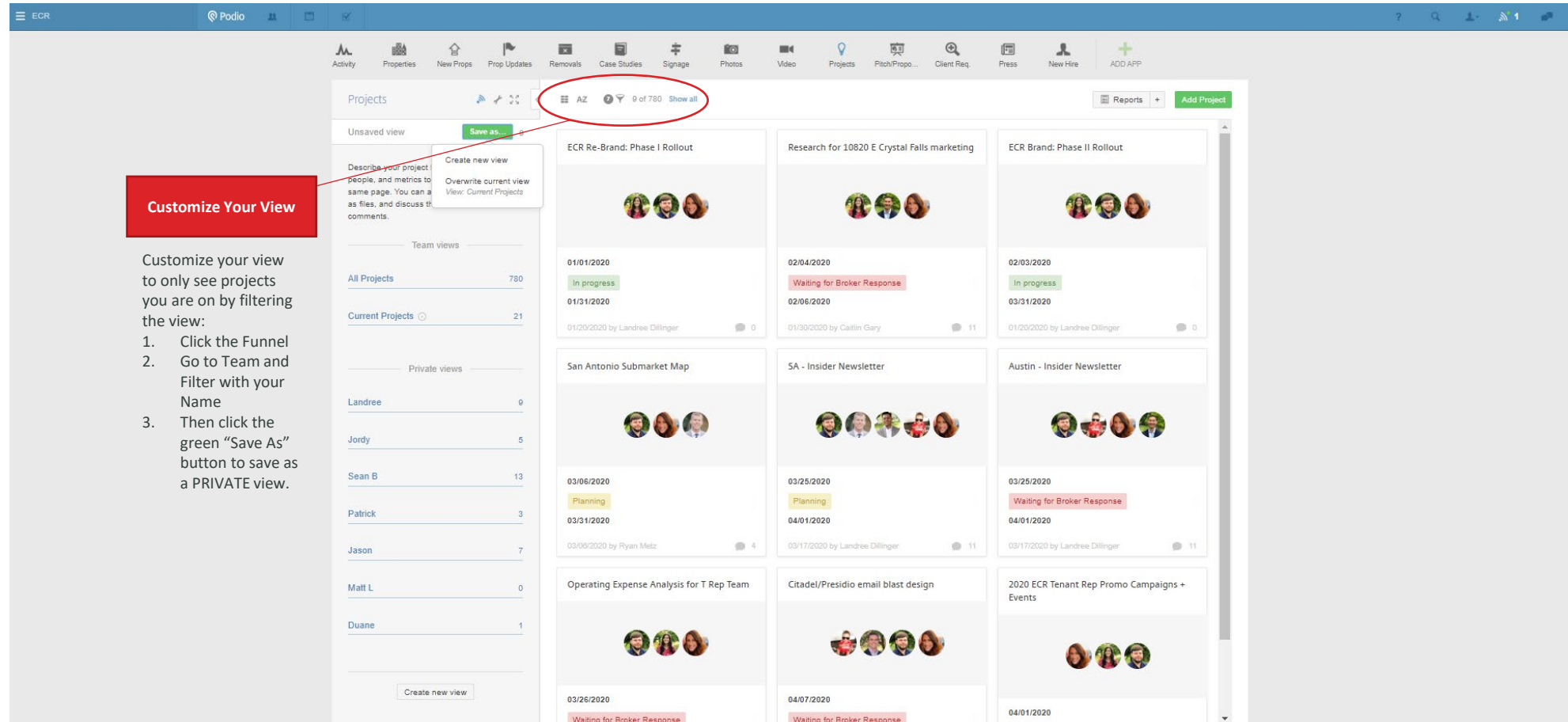
+ CREATE PHOTOS

Current Press 1

02/10/2020

+ CREATE PRESS

Filter Your View in Your Workspace



The screenshot displays the Podio workspace interface. At the top, a navigation bar includes the Podio logo and various icons for Activity, Properties, New Props, Prop Updates, Removals, Case Studies, Signage, Photos, Video, Projects, Pitch/Propo..., Client Req., Press, New Hire, and ADD APP. Below this, a secondary navigation bar shows icons for Activity, Properties, New Props, Prop Updates, Removals, Case Studies, Signage, Photos, Video, Projects, Pitch/Propo..., Client Req., Press, New Hire, and ADD APP. The main content area is titled 'Projects' and features a filter menu with 'AZ' selected, a funnel icon, and '9 of 780 Show all'. A red circle highlights this filter area. To the left, a red box labeled 'Customize Your View' points to a 'Save as...' button. Below this, a list of team views is shown, including 'All Projects' (780), 'Current Projects' (21), and several private views for team members like Landree, Jordy, Sean B, Patrick, Jason, Matt L, and Duane. The main grid displays project cards with titles, dates, status labels (e.g., 'In progress', 'Waiting for Broker Response', 'Planning'), and team member avatars.

Customize Your View

Customize your view to only see projects you are on by filtering the view:

1. Click the Funnel
2. Go to Team and Filter with your Name
3. Then click the green "Save As" button to save as a PRIVATE view.

Project Communication

Check in on progress, ask and answer questions, see activity, etc.

The screenshot shows the Podio interface for a project named "Pioneer Bank - Dripping Springs". The interface is divided into several sections:

- Left Sidebar:** Contains navigation options like "New New Property", "Modify Template", and "Actions".
- Additional Comments:** A section for adding comments, with "Yes" and "No" buttons.
- Files:** A section for uploading files, currently showing "Exhibit A.pdf" (198.1 KB) attached by Jennifer James 10 days ago.
- Tags:** A section for adding tags.
- Tasks:** A section for managing tasks, with a "Tasks" button circled in red. Below it is a list of tasks with checkboxes and due dates. A red box labeled "See Activity" points to this section with the text "View project activity here".
- Activity/Comments:** A section for viewing and adding comments. The "Activity" tab is selected and circled in red. A red box labeled "View all Activity" points to the top of this section with the text "See all comments, changes/edits, and additions in the 'Activity' section." Below the activity list, a red box labeled "Communicate Here" points to the "Add a comment" input field with the text "By commenting in the 'Add a comment' section, all members of the project team will receive a notification. If you'd like to directly address or assign a comment, use '@' + the person's name - It will pop up after a few letters are typed."

Assign a Custom Task

The screenshot displays the Podio interface for a project. A modal window titled "New task on SA - Insider Newsletter" is open, allowing users to assign tasks. The modal includes a checkbox for "Enter a task...", a field for "Pick a connection or type an email address", a "No due date" dropdown, a "SA - Insider Newsletter" tag, and a "Shared" dropdown. A "Create task" button is visible at the bottom right of the modal. In the background, a task list is visible with a "+ CREATE TASK" button circled in red. A red callout box points to this button.

**Assign a Custom Task:
+ Create Task**

At the bottom of any project (item), you can assign custom tasks.

Many project's tasks are automatically populated (ie. New Property, Property Updates, etc.) as the tasks are assigned via an automated Workflow.

Tasks

- 03/23/2020 --- Research/Brokerage to provide News Stories & Info
- 03/30/2020 --- Marketing to provide email blast draft
- 04/27/2020 --- Brokerage to provide Recent Transactions

+ CREATE TASK

Landree Dillinger created this 17 days ago

Update Your Email Settings

The screenshot shows the Podio account settings page. The top navigation bar includes a menu icon, the text "Choose a workspace or app", the Podio logo, and several utility icons. Below the navigation bar, there are tabs for "Account settings", "Services", "Email & Notifications" (highlighted with a red circle), "External app permissions", "API keys", and "App Market profile".

The "Email & Notifications" section is divided into three columns:

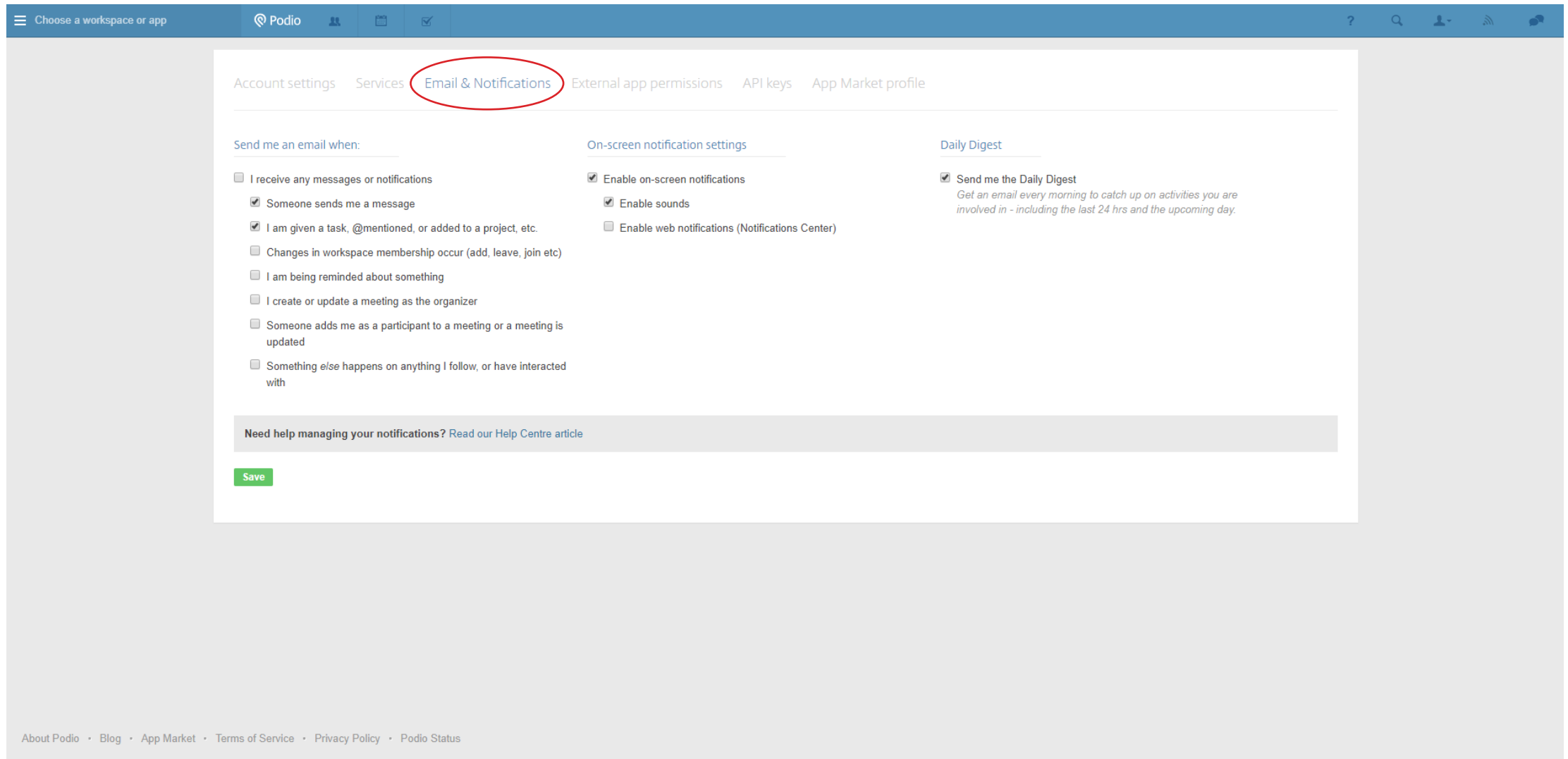
- Send me an email when:**
 - I receive any messages or notifications
 - Someone sends me a message
 - I am given a task, @mentioned, or added to a project, etc.
 - Changes in workspace membership occur (add, leave, join etc)
 - I am being reminded about something
 - I create or update a meeting as the organizer
 - Someone adds me as a participant to a meeting or a meeting is updated
 - Something else happens on anything I follow, or have interacted with
- On-screen notification settings:**
 - Enable on-screen notifications
 - Enable sounds
 - Enable web notifications (Notifications Center)
- Daily Digest:**
 - Send me the Daily Digest
 - Get an email every morning to catch up on activities you involved in - including the last 24 hrs and the upcoming c*

At the bottom of the settings area, there is a grey box with the text: "Need help managing your notifications? [Read our Help Centre article](#)". Below this is a green "Save" button.

On the right side, a user profile dropdown menu is open for "Landree Dillinger". The menu items are: "My profile", "Account settings" (highlighted with a red circle), "Extension Voucher offer", "Create another organization", "Pricing", "Billing", "Batch jobs", "My shared apps", and "Sign out".

At the bottom left of the page, there is a footer with links: "About Podio", "Blog", "App Market", "Terms of Service", "Privacy Policy", and "Podio Status".

Email Settings



The screenshot shows the Podio user interface with the 'Email & Notifications' settings page. The 'Email & Notifications' tab is highlighted with a red circle. The page is divided into three columns: 'Send me an email when:', 'On-screen notification settings', and 'Daily Digest'. The 'Send me an email when:' section has a main checkbox that is unchecked, and several sub-options, some of which are checked. The 'On-screen notification settings' section has two checked options. The 'Daily Digest' section has one checked option with a descriptive subtitle. A 'Save' button is located at the bottom left of the settings area. The footer contains links for 'About Podio', 'Blog', 'App Market', 'Terms of Service', 'Privacy Policy', and 'Podio Status'.

Choose a workspace or app Podio ? Q

Account settings Services **Email & Notifications** External app permissions API keys App Market profile

Send me an email when:

- I receive any messages or notifications
 - Someone sends me a message
 - I am given a task, @mentioned, or added to a project, etc.
 - Changes in workspace membership occur (add, leave, join etc)
 - I am being reminded about something
 - I create or update a meeting as the organizer
 - Someone adds me as a participant to a meeting or a meeting is updated
 - Something else happens on anything I follow, or have interacted with

On-screen notification settings

- Enable on-screen notifications
 - Enable sounds
 - Enable web notifications (Notifications Center)

Daily Digest

- Send me the Daily Digest
Get an email every morning to catch up on activities you are involved in - including the last 24 hrs and the upcoming day.

Need help managing your notifications? [Read our Help Centre article](#)

Save

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ADVANCED

Creating Custom Workspaces, Apps, and Workflows



Create a Workspace

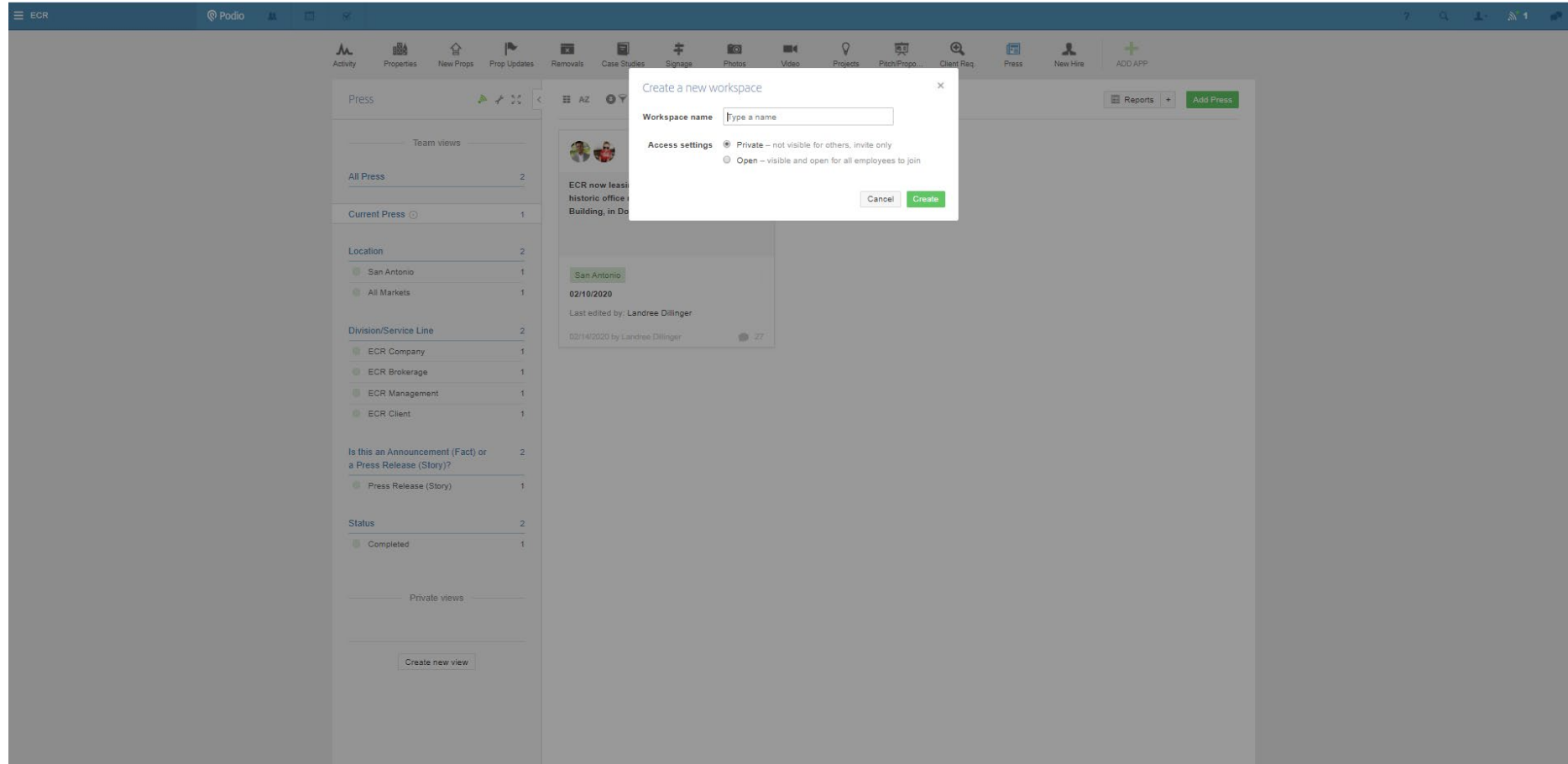
The screenshot shows the Podio workspace interface for 'ECR'. The left sidebar contains a list of workspaces, with 'ECR' selected. Below the list are options to 'Create a workspace' and 'Manage workspaces'. The main content area displays a feed of updates for the 'ECR 22' workspace, including a note about gathering information, photos, and a newsletter. On the right, there are four summary cards: 'Current Prop Updates 9', 'Current Projects 21', 'Current New Props 2', and 'Current Signage 5'. Each card lists items and has a '+ CREATE' button.

Workspace
Click to select the desired Workspace

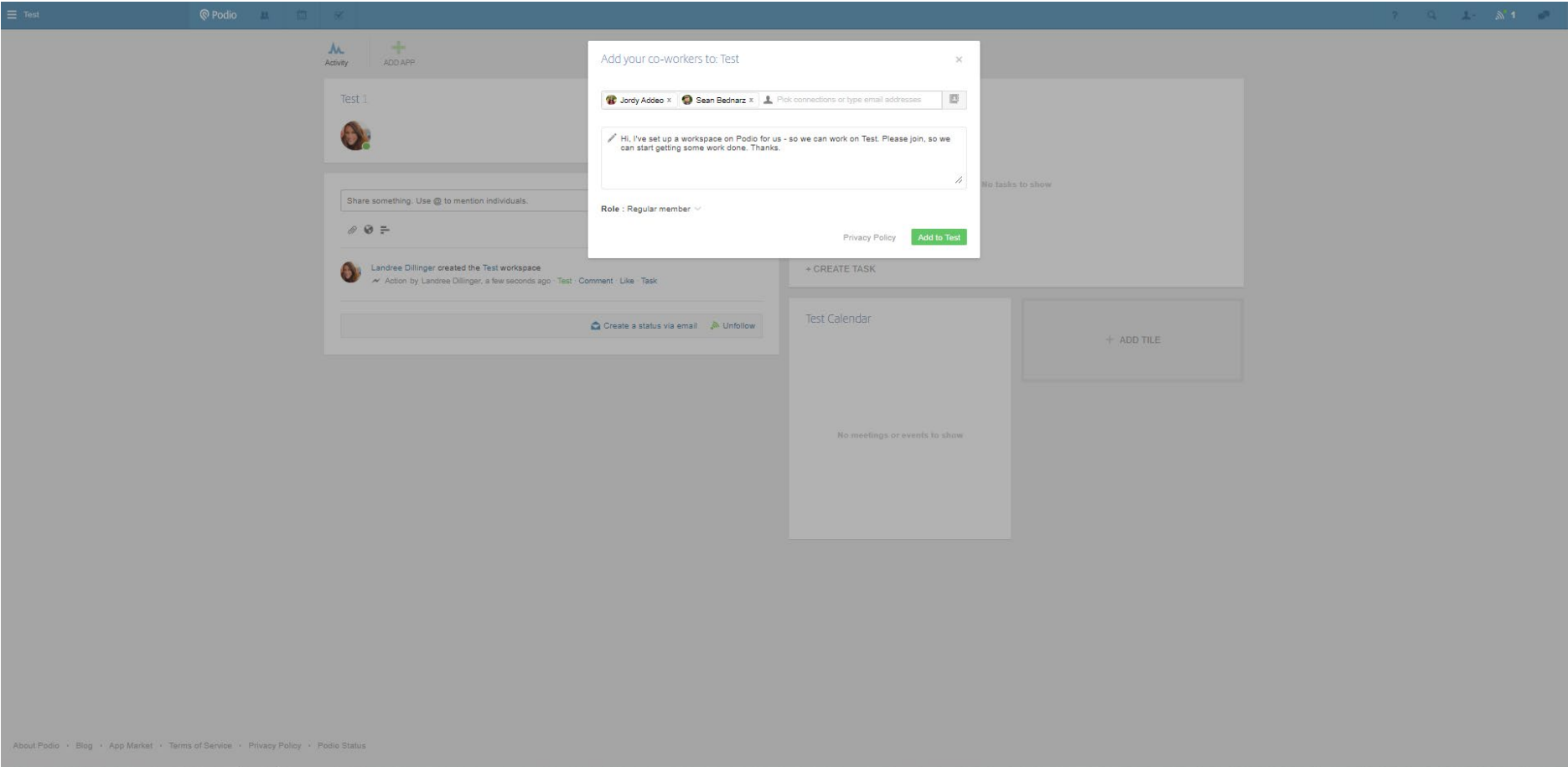
Create a Workspace
Click to create a new workspace, select Team Members who will have access and create an apps.

Manage Workspace
Click to make edits to team, apps, or to make changes to your workspaces.

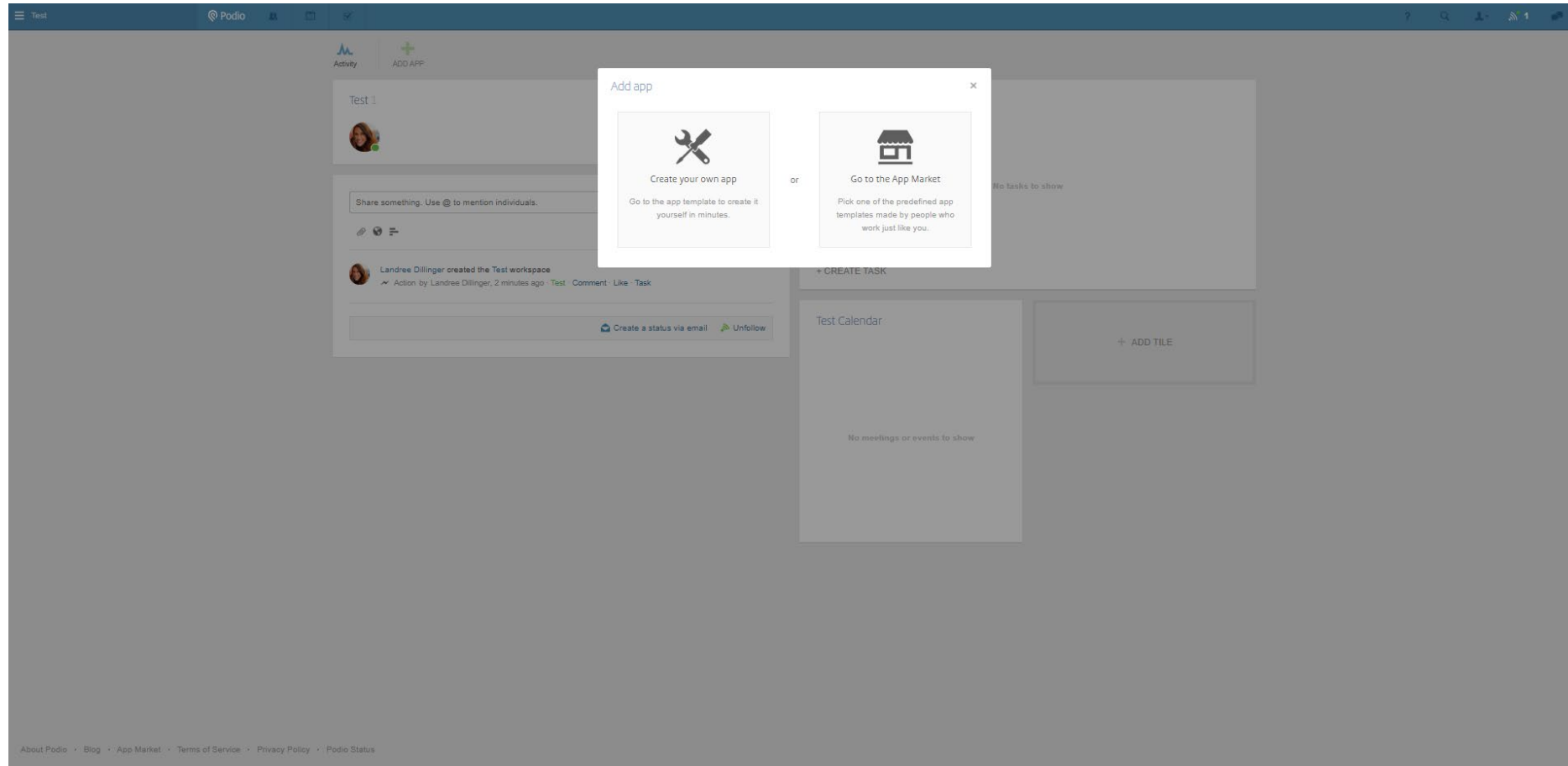
Create a New Workspace



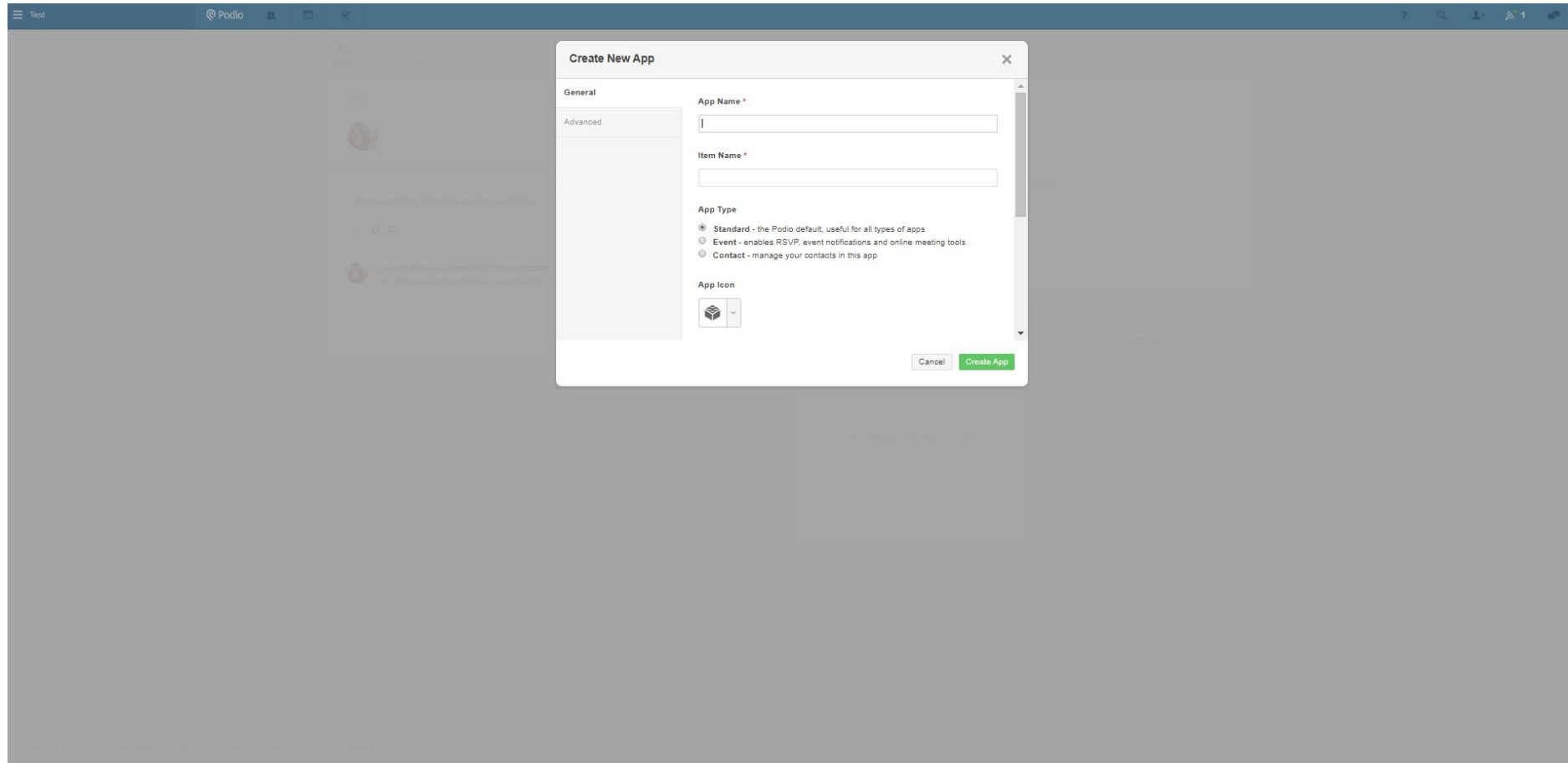
Add Co-Workers to a Workspace



Create an App in Your Workspace



Create a Custom App



Browse the App Market

The screenshot displays the Podio App Market interface. At the top, a blue header bar contains the Podio logo and navigation icons. Below the header, a search bar is positioned above a sidebar of categories. The main content area is titled "Podio App Market" and features two sections: "Recommended packs" and "Recommended apps".

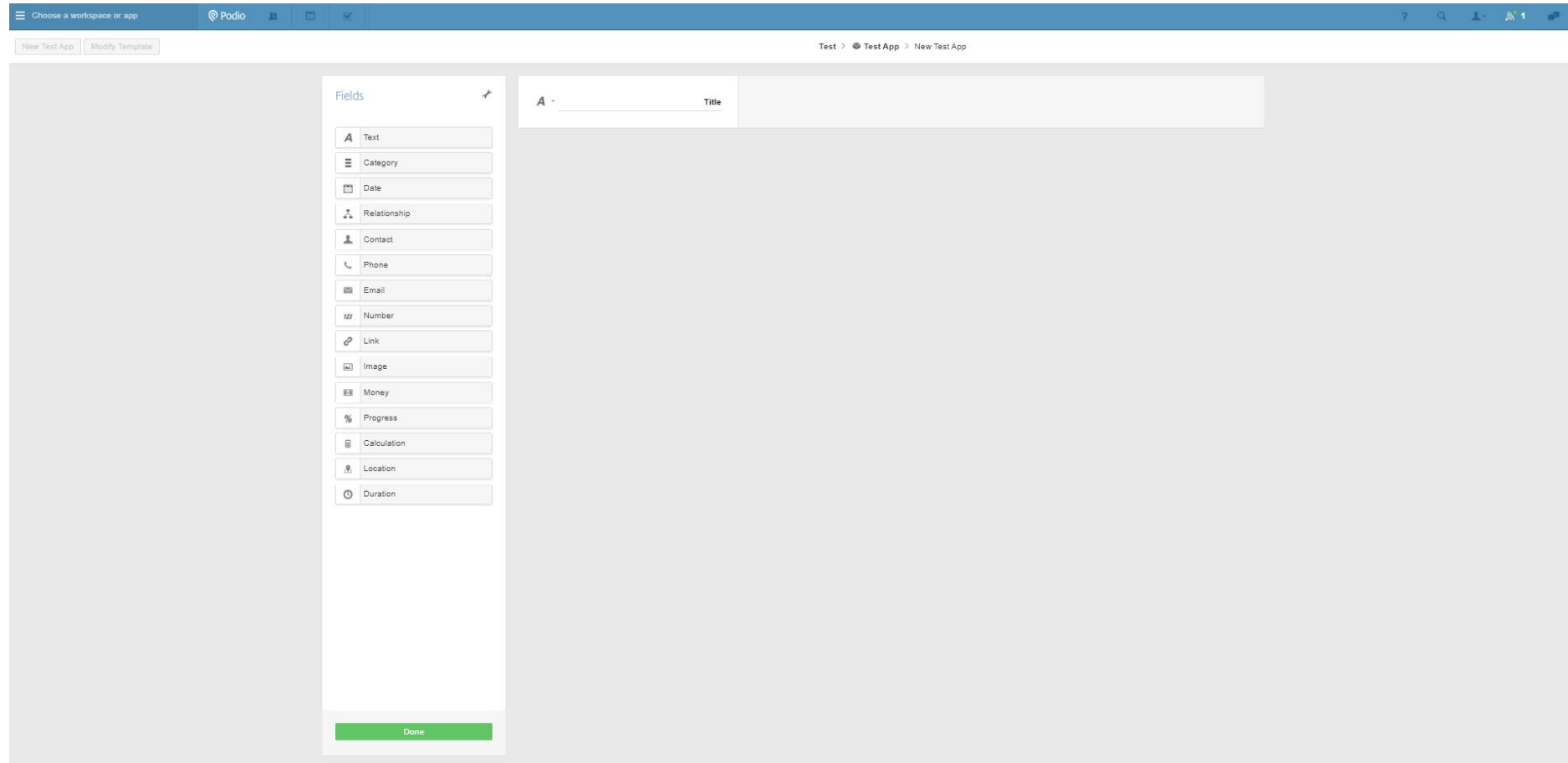
Recommended packs: This section displays three app packs: "Project Management", "Sales Management", and "Product Development...". Each pack includes a brief description, a star rating, and buttons for "Get Pack" and "More info". A pagination bar below these packs shows page numbers 1 through 9, with "1" being the active page.

Recommended apps: This section displays six individual apps arranged in a 2x3 grid. The top row includes "Projects", "Deliverables", and "Companies". The bottom row includes "Deals", "Candidates", and "Focus - Anti-ToDo". Each app card shows a description, a star rating, and buttons for "Get App" and "More info". A pagination bar at the bottom of this section also shows page numbers 1 through 9, with "1" being the active page.

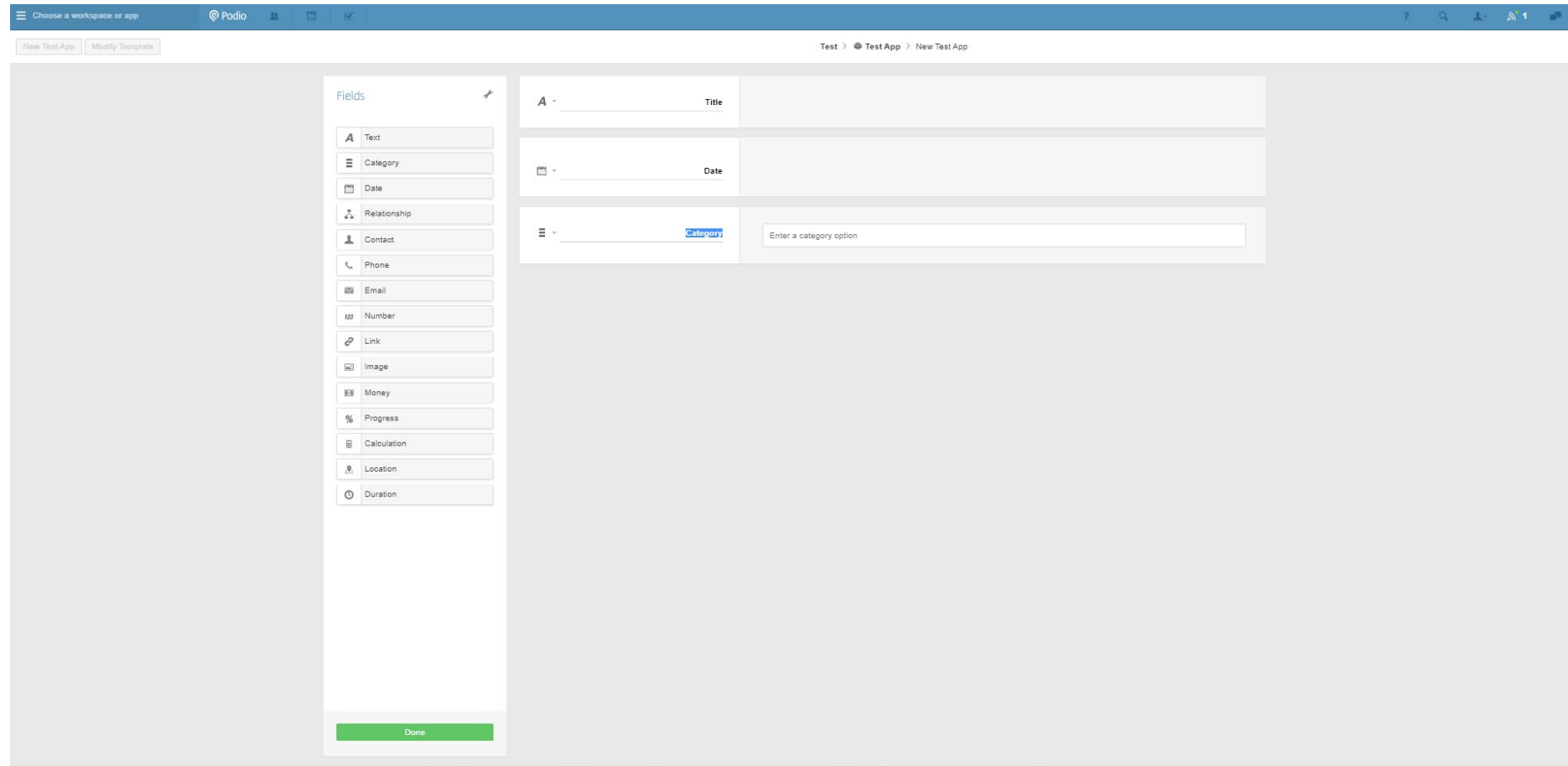
Sidebar Categories:

- Functional:** Business Development, Class Work & Education, Community Management, Creative & Innovation, Event Management, Human Resources, Integrations, Intranet, IT Management, Legal, Legal & Finance, Management, Marketing, Meetings & Conferencing, Mobile, Notes and Personal, PR & Communication, Praise & Work Happiness, Project Management, Real Estate & Property, Sales & CRM, Software Development, Supply Chain Management.
- Industry:** Advertising, Consulting, Creative & Arts, Education, Engineering, Financial services & Accounting, Internet, Law Firm, Marketing & PR, Media Agency, NGO, Other, Real Estate.

Building an App: Drag and Drop



Building an App: Drag and Drop/Edit



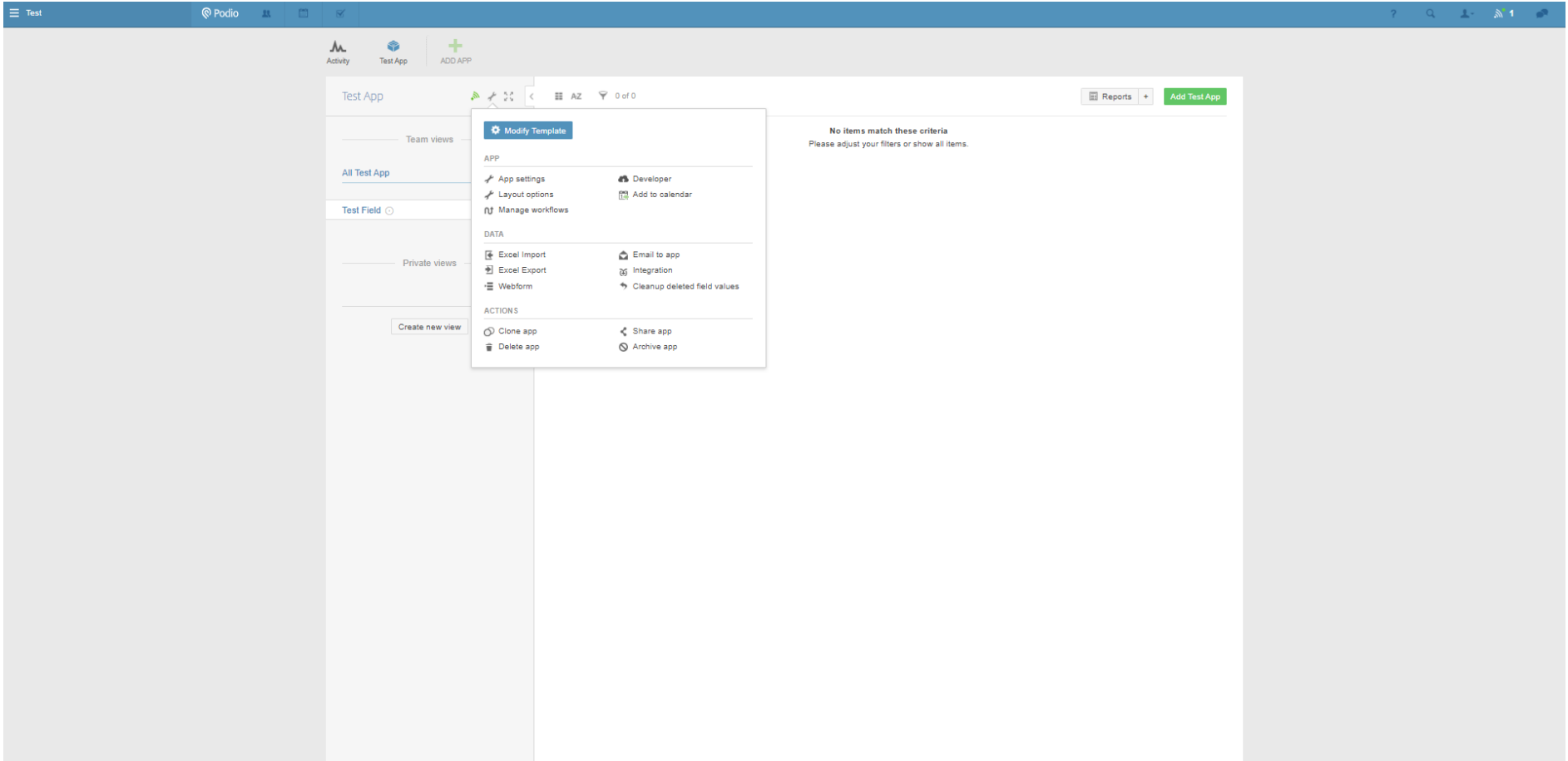
Building an App: Content Settings

The screenshot displays the Podio app builder interface. At the top, a blue header bar contains the Podio logo and navigation icons. Below the header, a breadcrumb trail reads "Test > Test App > New Test App". The main workspace is divided into three sections:

- Fields Panel (Left):** A vertical list of field types including Text, Category, Date, Relationship, Contact, Phone, Email, Number, Link, Image, Money, Progress, Calculation, Location, and Duration.
- Field Configuration (Middle):** A configuration panel for the selected "Test Field". It includes a "Required field" checkbox, "Hidden if empty" and "Always hidden" checkboxes, a "Color in calendar" checkbox (with a note "Date field required in template"), radio buttons for "Single choice" (selected), "Multiple choice", "Inline" (selected), "List", and "Drop-down list", and an "Add help text ..." link.
- Form Preview (Right):** A preview of the app form showing three fields: "Title", "Date", and "Test Field". The "Test Field" is a drop-down menu with the placeholder text "Enter a category option".

A green "Done" button is located at the bottom of the Fields panel.

Adjust/Edit Your App Settings



Create Automated Workflow and Assign Tasks

The screenshot displays the Podio workflow creation interface. The top navigation bar includes the Podio logo and various utility icons. The main workspace is divided into four numbered steps:

- 1 When**: This step is titled "When" and contains two trigger options: "Test App Created" and "Test App Updated". Below these options, a text box states: "This workflow will start when a new Test App is created."
- 2 .and if**: This step is titled ".and if" and contains a text box stating: "No conditions have been added to this workflow". Below this, there are input fields for "Select field...", "field value", and "Select operator...", along with an "Add condition" button.
- 3 Then**: This step is titled "Then" and contains five action buttons: "Create Task", "Add Comment", "Create item", "Update item in ...", and "Update item here". Below these buttons, a "Create Task" form is visible, with fields for "Title" (set to "Create Custom Task"), "Assign to" (set to "Landree Dillinger"), "Due" (set to "Next Monday"), and "Details" (with the placeholder "Enter something here").
- 4 Name your workflow**: This final step is titled "Name your workflow" and contains a text input field with the placeholder "Name your workflow. E.g. Create task when item is created". Below the input field are "Save" and "Cancel" buttons.

On the right side of the interface, there is a help panel with the following content:

- 1 Cause**: Choose a Cause to trigger the Effect to happen.
- 2 Conditions**: Select one or more Conditions that all must be true for Effects to happen.
- 3 Effect**: Choose an Effect that will happen when the Cause is triggered.

A tip box below the help panel reads: "Tip. In the text inputs you can use variables to insert data. To select a variable, type an @ symbol to see the list. e.g. Design is @progress complete."

Manage Workflows in an App

The screenshot displays the Podio app interface. At the top, a blue navigation bar contains the Podio logo, a user profile icon, a search icon, and a notification bell. Below the navigation bar, a secondary bar shows 'Activity', 'Test App', and 'ADD APP' options. The main content area is titled 'Workflows for Test App'. It features a descriptive paragraph: 'Workflow automate processes on Podio, so you don't have to do the clicking. They can be simple or powerful, and take minutes to setup.' Below this is a 'Give it a try.' section with a green 'Create Workflow' button. To the right of the text is a stylized flowchart diagram. Further right is a promotional card for 'globiflow' with the text 'Reduce manual work and save time with GlobiFlow!' and a 'See premium plan' button. At the bottom left, a footer contains links: 'About Podio', 'Blog', 'App Market', 'Terms of Service', 'Privacy Policy', and 'Podio Status'.

Test Podio

Activity Test App ADD APP

Workflows for Test App

Workflow automate processes on Podio, so you don't have to do the clicking. They can be simple or powerful, and take minutes to setup.

Give it a try.

[Create Workflow](#)

globiflow

Reduce manual work and save time with GlobiFlow!

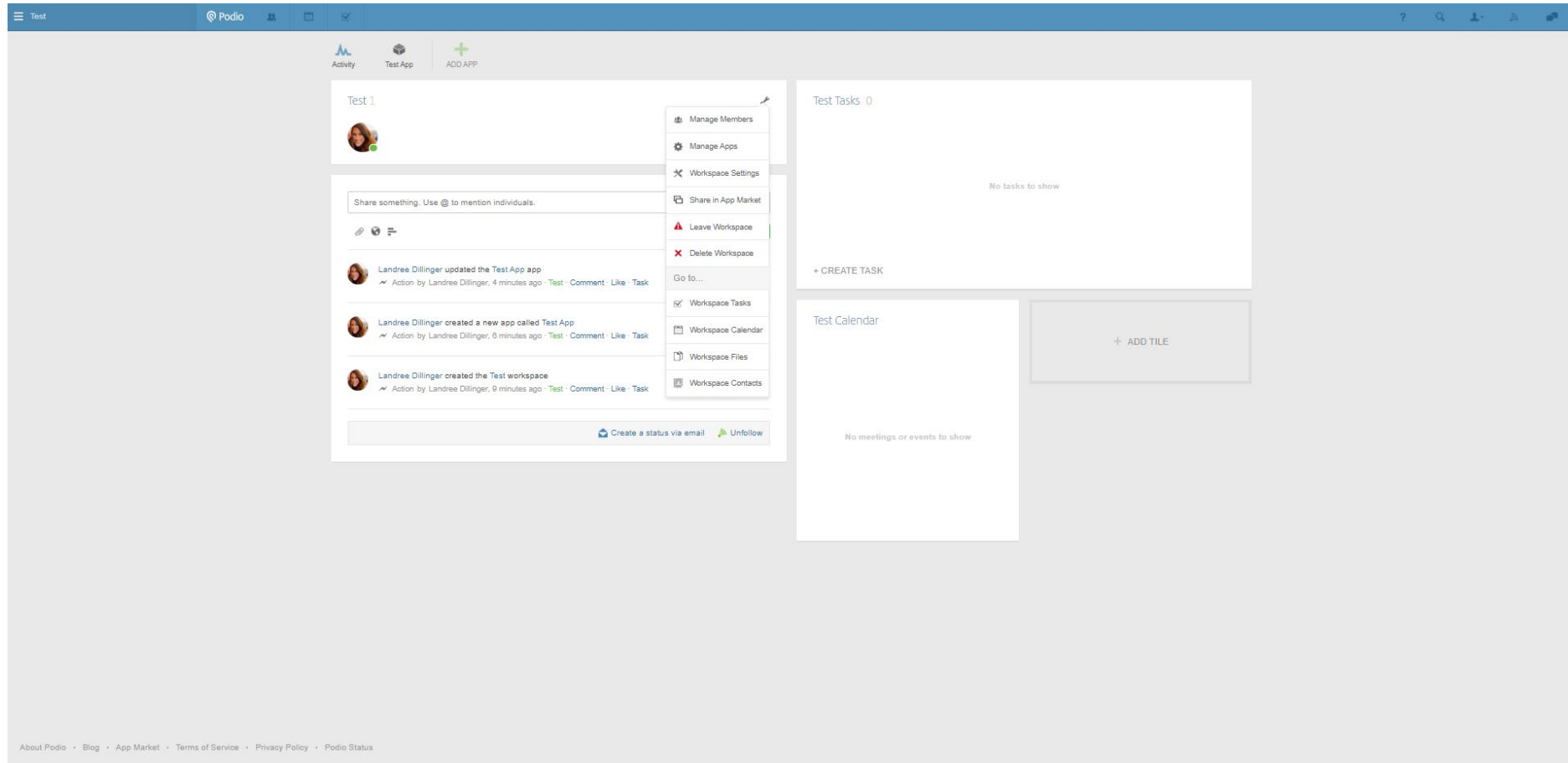
This extension lets you automate a vast number of things you are probably doing manually in Podio now.

When you upgrade to Podio Premium, you get free access to GlobiFlow.

[See premium plan](#)

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Manage Workspace Settings



The screenshot displays the Podio workspace settings interface for a workspace named "Test 1". The interface is divided into several sections:

- Header:** A blue navigation bar at the top contains the Podio logo, a search icon, and user profile icons.
- Workspace Header:** Below the navigation bar, the workspace name "Test 1" is displayed with a profile picture and a "Test App" icon.
- Activity Feed:** A list of recent actions is shown, including "Landree Dillinger updated the Test App app", "Landree Dillinger created a new app called Test App", and "Landree Dillinger created the Test workspace". Each action includes a checkmark, the user's name, the time elapsed, and options to "Test", "Comment", "Like", or "Task".
- Share Bar:** A text input field with the placeholder "Share something. Use @ to mention individuals." and icons for sharing and commenting.
- Settings Menu:** A dropdown menu is open, listing various workspace management options: "Manage Members", "Manage Apps", "Workspace Settings", "Share in App Market", "Leave Workspace", "Delete Workspace", "Go to...", "Workspace Tasks", "Workspace Calendar", "Workspace Files", and "Workspace Contacts".
- Test Tasks:** A section titled "Test Tasks 0" with the message "No tasks to show" and a "+ CREATE TASK" button.
- Test Calendar:** A section titled "Test Calendar" with the message "No meetings or events to show" and a "+ ADD TILE" button.
- Footer:** A footer at the bottom contains links for "About Podio", "Blog", "App Market", "Terms of Service", "Privacy Policy", and "Podio Status".