

CLICKUP: A Comprehensive Guide

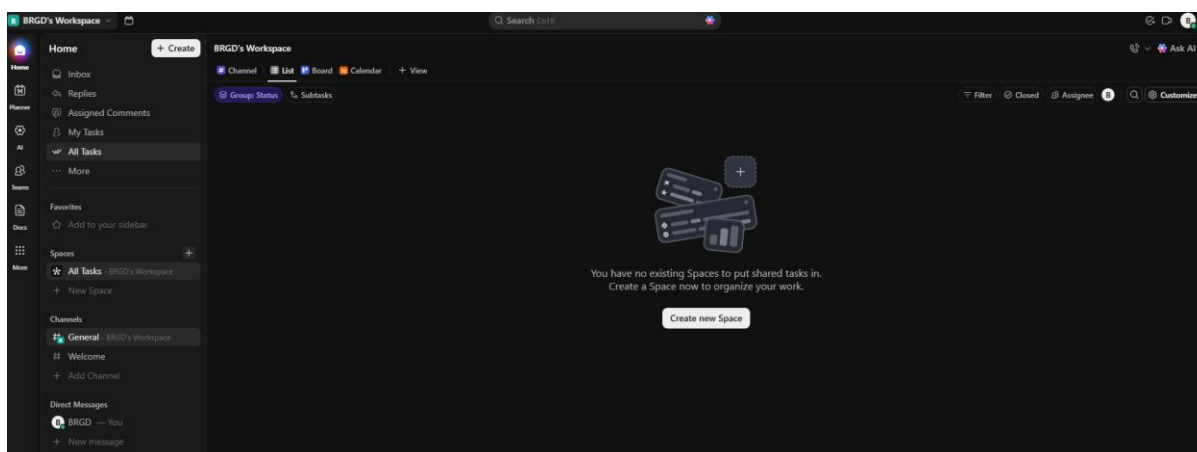
What is ClickUp?

ClickUp is an all-in-one tool that helps teams organize their tasks, manage deadlines, track goals, and collaborate more easily. It brings together features like task lists, calendars, documents, and team communication in one place, helping users to stay organized and work more efficiently.

ClickUp is best suited for users with an **intermediate** skill level. Because the platform offers many tools and customization options, it can feel a bit overwhelming at first, but it becomes much easier to use with practice.

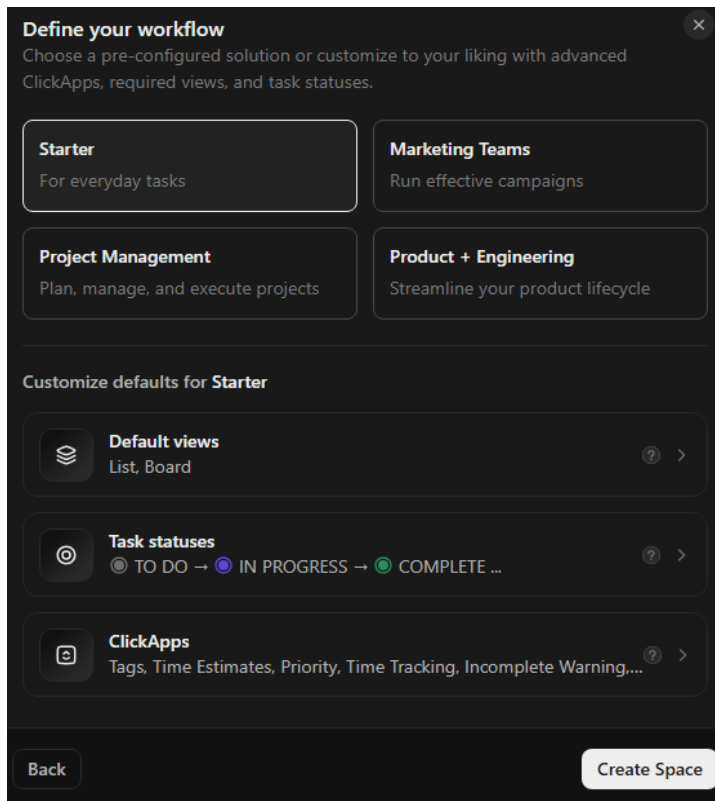
How to access ClickUp?

Once you get on the website clickup.com, sign up for an account with your business email address. Upon completing the questions ClickUp is asking you, you will reach the **HOME Screen**.



How to create a working space?

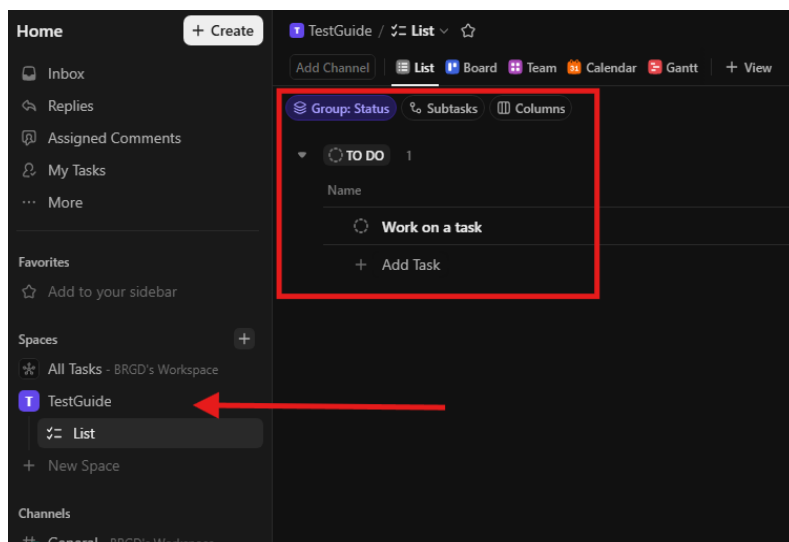
From there, you are able to **create a space**, which will allow you to access **task management, tools, and apps** for your project.



→ ClickUp will allow you to choose **customized workflows** (e.g. Starter, Marketing Teams, Project Management...) which are preset to your needs depending on your business. If you prefer, you can also **choose and modify the settings yourself**.

Once you have created your space, all chosen tools become accessible in one place.

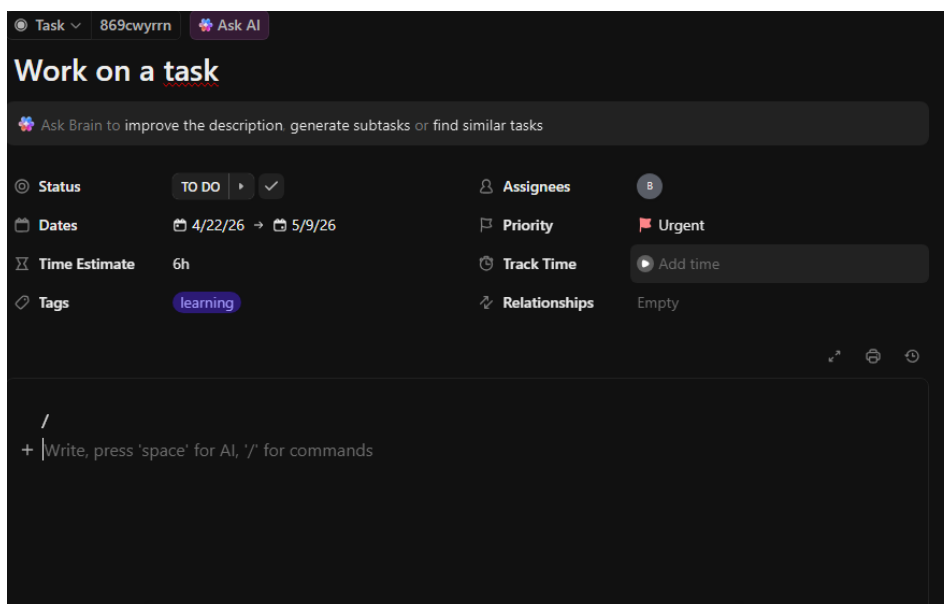
How to create a task?



→ In your space, you can add tasks.

→ You can make **checklists** and detail how parts of your work and projects should be handled.

→ The “+” icon will allow you to create a new task.



→ After that, this overlay appears. From here on out, you will be able to modify multiple characteristics of your task.

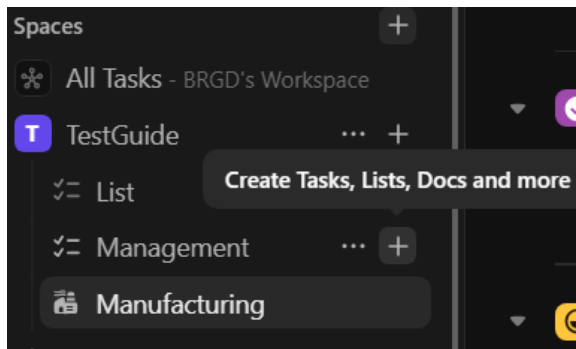
→ Change the status of your task, the deadline, the priority level, assign team members to it... This way, you can quickly get an overview of what needs to be done and by whom.

You can afterwards add descriptions, subtasks, a checklist or even ask AI to do it for you with a prompt like: “Write a checklist for Young Entrepreneur in order for them to understand ClickUp” which will give you:

Checklist: Understanding ClickUp for Young Entrepreneurs

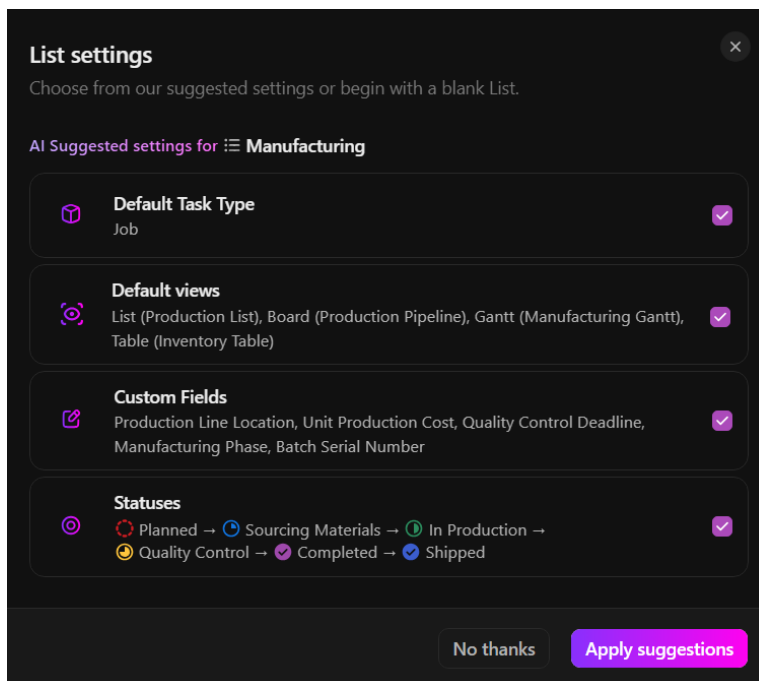
- **Create an Account:** Sign up for a ClickUp account and explore the free plan to get started.
- **Set Up a Workspace:** Create a workspace for your business or project.
- **Learn the Basics:** Watch introductory videos or tutorials on ClickUp's features.
- **Explore Task Management:** Create tasks, assign priorities, set due dates, and add descriptions.
- **Understand Views:** Experiment with different views like List, Board, and Calendar to see what works best for you.
- **Use Custom Statuses:** Set up statuses that match your workflow (e.g., "to do," "in progress," "complete").
- **Add Team Members:** Invite collaborators and assign tasks to them.
- **Try Time Management Features:** Use time estimates, time tracking, and start/due dates to manage your schedule.
- **Explore Integrations:** Connect ClickUp with tools you already use (e.g., Google Drive, Slack).
- **Set Goals:** Use the Goals feature to track progress on your business objectives.
- **Learn Automation:** Set up simple automations to save time on repetitive tasks.
- **Experiment with Templates:** Use or create templates for recurring projects or tasks.
- **Review Reports:** Check out the reporting tools to analyze productivity and team performance.
- **Ask for Help:** Use ClickUp's support resources, like their Help Center or community forums, if you get stuck.
- **Practice and Adjust:** Use ClickUp regularly and tweak your setup as you learn what works best for your business.

How to make categories through lists?

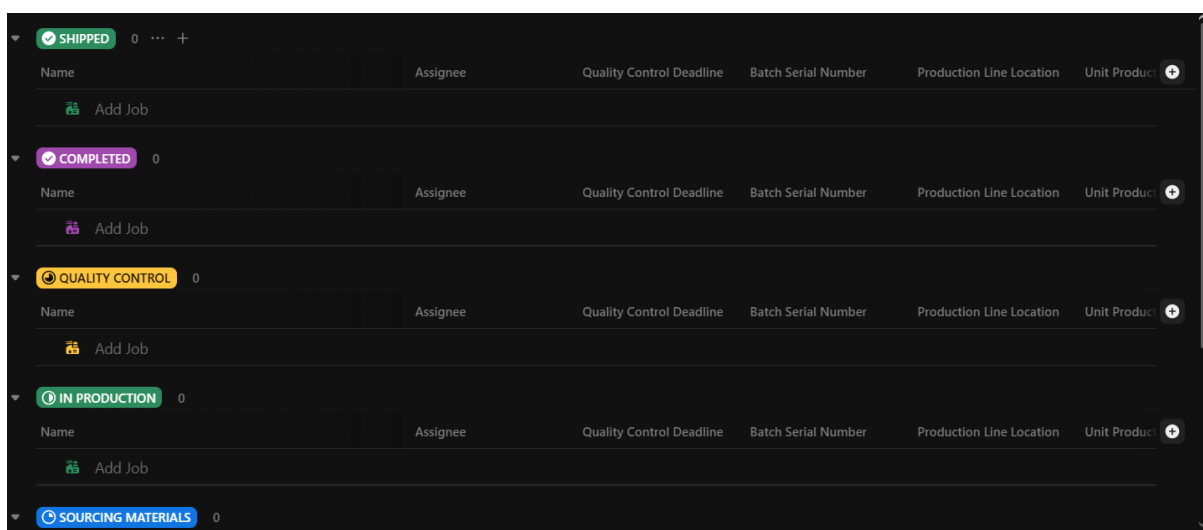


→ If you wish to create categories of tasks, you have to use the “+” icon next to your lists in the “Spaces” column on the left.

This will help you separate different types of tasks in a single shared environment.

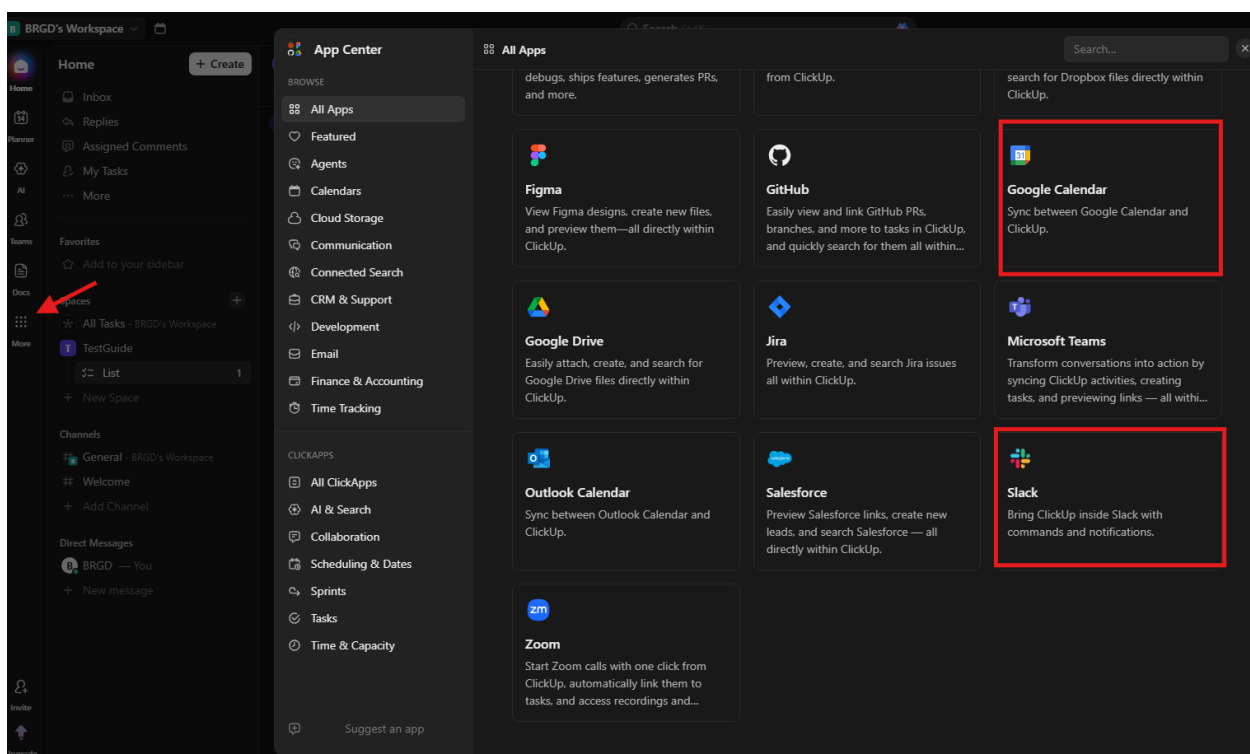


→ AI will even suggest settings for you when creating a list, based on the title you gave to your list (See the “Manufacturing” example below)



How to link applications to ClickUp?

Use the “More” option on the left part of the overlay to connect different useful applications and websites to your ClickUp working space. This can help you get easier access to all documents, tools and information in one place. Team members will also greatly benefit from this feature, having access to the same resources in real time, allowing simpler interactions and smoother collaboration. Team members can for example connect through GitHub or Google Drive in order to share their documents from multiple devices easily. Integrating tools such as Teams or Slack can also help streamline and organise communication within your team.

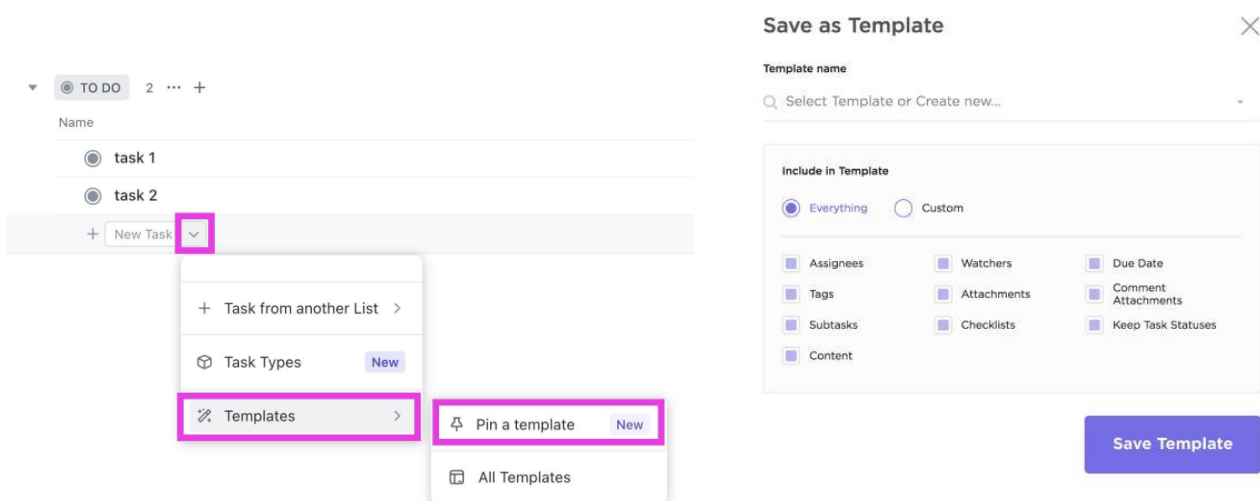


How to make and use task templates?

ClickUp offers the possibility to make templates that all team members can reuse instead of creating projects or tasks from scratch. This helps saving time, reducing mistakes, standardizing workflows, onboarding and improving communication.

To create a task template, follow these steps:

1. Create a new task or open an existing one.
2. Configure the task exactly how you want it reused (add checklist steps, assign collaborators, set priorities or statuses...)
3. Click the three dots menu (...) in the task window and select “Templates”.
4. Choose “Save as Template” and give the template a clear name.



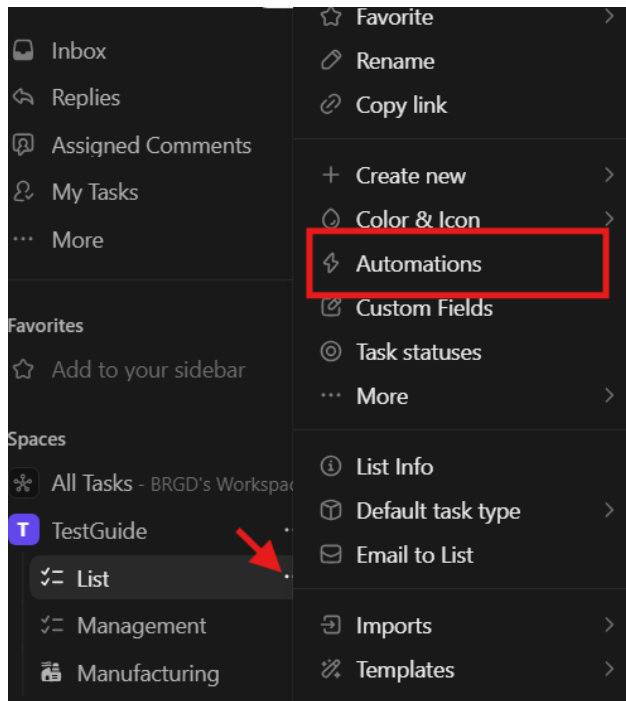
The template is now available for the whole team (don't forget to check the access settings). When someone needs to create a similar task they just need to:

1. Create a new task.
2. Open the “Templates” option.
3. Select “Browse Templates”.
4. Choose the desired task template.
5. Click “Use Template”.

ClickUp will automatically fill in the predefined elements.

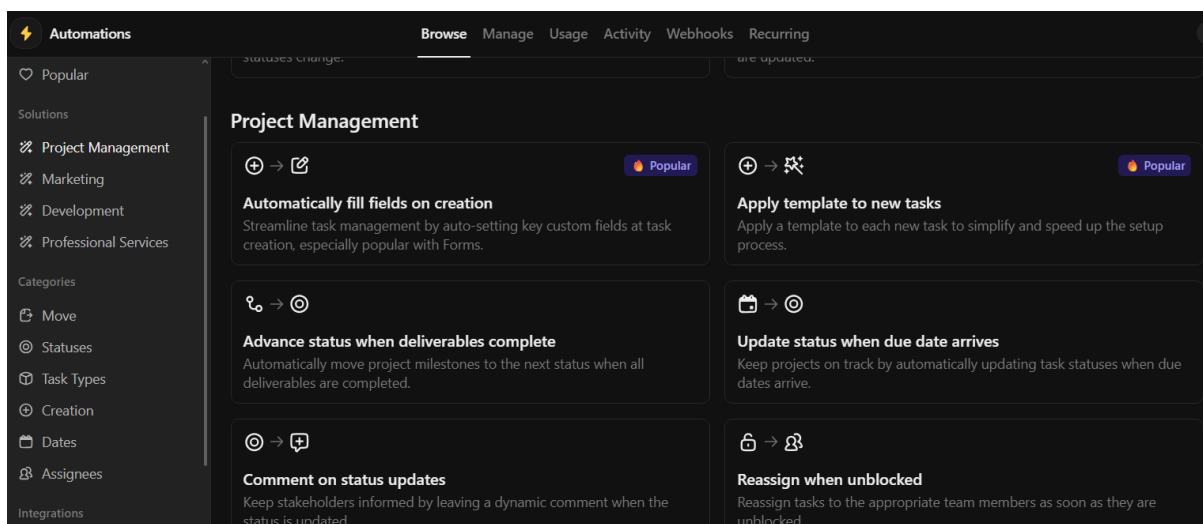
How to automate other tasks?

If you go back on your task space and go to the settings, you will be able to create **automations**. These will allow you to automate parts of your tasks for better organisation.



→ As an example, with “**Update status when due dates arrive**”, you will be able to automate the priority of a task when the deadline is approaching.

You can see other examples of automation on the screenshot below.

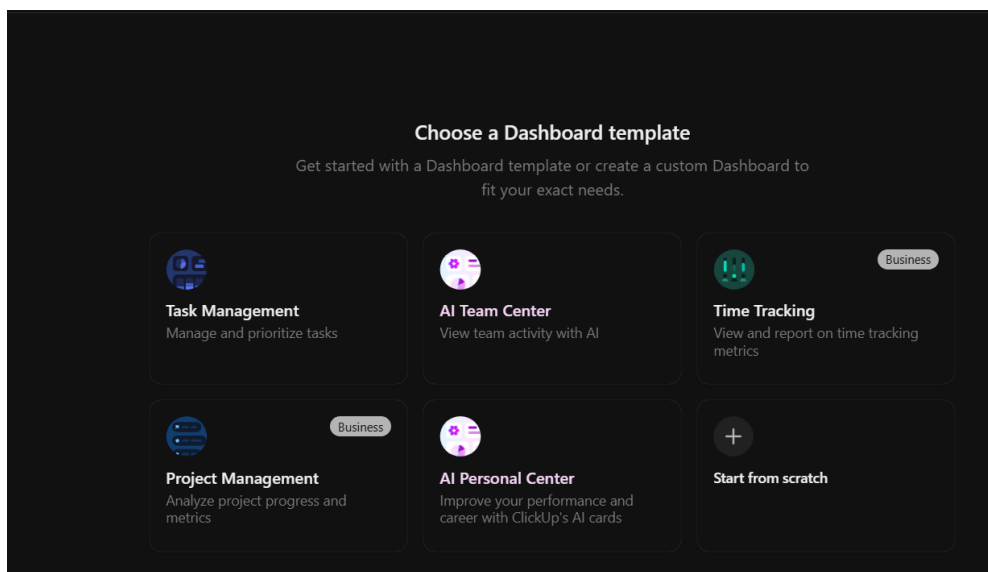


The “**Run AI on schedule**” is another option that can be quite useful as it will allow you to put AI on scheduled routine tasks and workflows so that you can more efficiently focus on bigger tasks. Do not hesitate to explore the possibilities offered by AI and see which ones fit best with your needs.

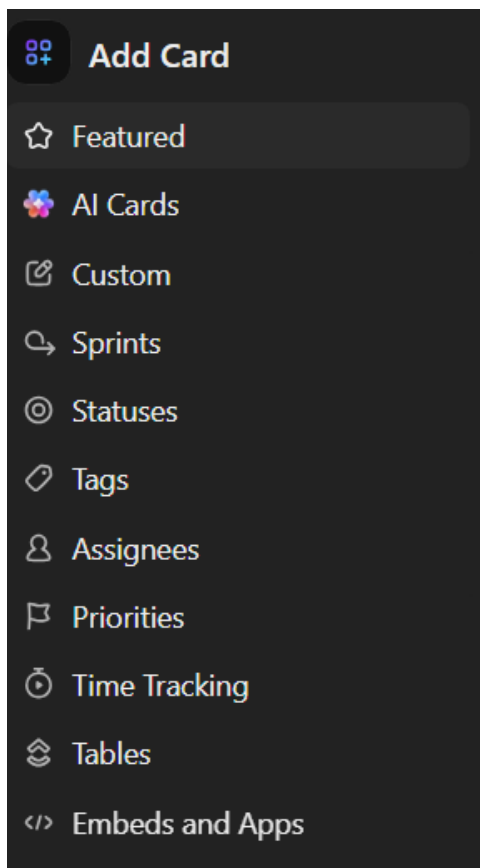
How to create a dashboard on ClickUp?

Dashboards in ClickUp work like a project control center. They show all the important information in real time, so teams can quickly understand progress, workloads, deadlines, productivity, and goals without searching through multiple tasks.

The “Dashboard” option is accessible through the search bar, or when going to “More”. There, you will find pre-made dashboard templates you can use. You can also start one from scratch. Do not forget to select who can have access to your dashboard, and be aware that some options like “project management” and “time tracking” require to be under the “Business” paid plan.



When creating your dashboard, you will be asked to indicate which widgets (or cards) you want to add (task lists, workload view, goal progress...).



Custom: A flexible card to display personalised data

Sprints: Tasks completed, in progress, and remaining work in a given period

Statuses: Status of the tasks (e.g. to do, in progress, done).

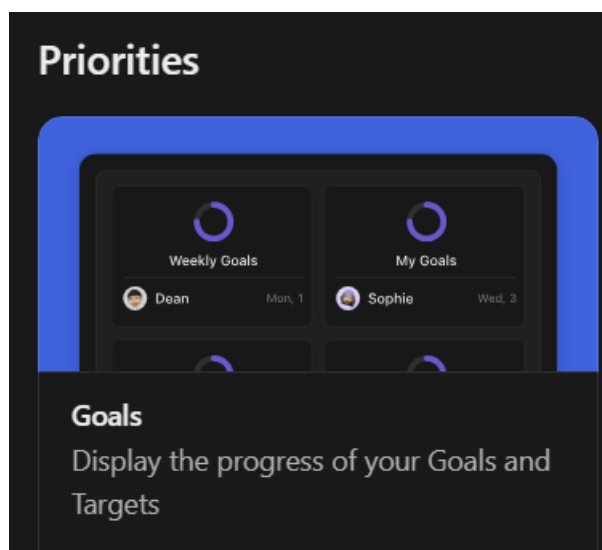
Tags: displays tasks based on labels or categories.

Assignees: who is responsible for which tasks and how workload is divided across the team.

Priorities: tasks based on urgency levels such as high, medium, or low priority.

Time tracking: time spent on tasks or projects.

Here is an example of the type of card you can create. This is the Goal Tracking card. It is linked to the “Goal Setting” option of ClickUp that helps teams set clear objectives and measure progress automatically based on completed work.



Pricing

While ClickUp can be used for free by everyone, there are a few paid options that you can pick from with different advantages.

There are 4 different options including the free one, each having more advantages than the previous one. Be mindful that the prices are per user per month.

Additional information and tutorials can be found on

<https://university.clickup.com/path/clickup-for-beginners>