

Trello for teams: a board, lists, cards, labels, due dates and a free automation rule on one page

The steps from the free Trello for Teams course, practised there on real Trello screens (Free plan).

New words

Board

One project or process, e.g. Client onboarding.

List

A stage, left to right: To do, In progress, Waiting on client, Done.

Card

One task. Holds labels, dates, checklists, comments.

Set up the board

1. **Create** > **Create board**, type a title, check the **Workspace**, **Create**.
2. Type the first list name, **Add list**; repeat for each stage.
3. **Add a card** under To do; start each card with the client name.

Labels and due dates

1. Open a card > **Labels** > pencil on a colour > name it (**Urgent**) > **Save**, then tick it.
2. **Dates** > tick **Due date** > pick the day > **Save** (reminder 1 day before).
3. Drag cards between lists; that is the status update.

A free automation rule

1. Board header **lightning bolt** (Automation) > **Rules** > **Create automation**.
2. + **Add Trigger** > Card Move: when a card is **added to** list **Done by anyone** > +.
3. Action: **Dates** > **mark the card as complete** > + > **Save**.

Remember: If a tidy-up job happens every time, make it a rule; if a task is stuck with someone outside the team, give it its own list.

Practice it free: Trello: Track Client Onboarding on One Team Board at learn.ynteractive.com/modules/trello-client-onboarding. This sheet: learn.ynteractive.com/content/cheat-sheets/trello-team-board. The four-person bookkeeping firm is a made-up business from the lesson. By Robert Breen, October 24, 2026.