



Podio

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Getting started with Podio

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- [Quick Start: Guide to CRM and Sales](#)
- [Quick Start: Guide to Accounting](#)
- [Quick Start: Guide to Recruiting](#)
- [Quick Start: Guide to Real Estate](#)

Case studies: Project Management

- [Applied Storytelling: Streamlining Client Project Management with Podio](#)
- [Millimeter Group: Pioneers in Project Management](#)
- [Growing, Improving and Never Compromising on Efficiency: Metonymy Media on Podio](#)

Case studies: Client and Sales Management

- [ESA: Revolutionizing how they deliver education with Podio](#)
- [Miinto Creates the Most Fashionable CRM System in the World, with Podio](#)

Case studies: Marketing and Team Management

- [How Cirque du Soleil Manages Marketing with Podio](#)
- [Working Wonders with Webforms at Time Warner Cable](#)
- [No Office. No Employees. No Email. How Makeshift Produces Their Brilliant Magazine](#)

Knowing Podio

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Quick Start Guides

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Podio Case Studies

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Knowing Podio

Case studies: Project Management

- [Applied Storytelling: Streamlining Client Project Management with Podio](#)
- [Millimeter Group: Pioneers in Project Management](#)
- [Growing, Improving and Never Compromising on Efficiency: Metonymy Media on Podio](#)

Case studies: Client and Sales Management

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- [Working Wonders with Webforms at Time Warner Cable](#)
- [No Office. No Employees. No Email. How Makeshift Produces Their Brilliant Magazine](#)

Video Tutorials

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- [Video: The Structure of Podio](#)
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- [Video: The Podio Effect](#)
- [Video: Managing notifications](#)
- [Video: Podio Workflow Automation Tutorial](#)
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- [Video: Managing your Podio Organization with ShareFile](#)

Podio Webinars

December 11, 2023

The Podio team occasionally hosts webinars to demonstrate common use-cases, as well as holding live Q&A sessions. Take a look below at our previous events.

- [05.26.15 Podio Sales & CRM Webinar](#)
- [05.21.15 Podio Live Support Q&A](#)
- [05.12.15 Podio Intranet Webinar](#)
- [06.09.15 Podio Project Management Webinar](#)
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- [Podio 101](#)
- [Podio 201](#)
- [Podio Quick Walkthrough : Citrix Converge 2021](#)
- [10.12.2022 Podio as a CRM solution - with smrtPhone's Jordan Fleming](#)
- [09.21.2022 How can Podio automate your Workflows](#)
- [02.23.2023 Podio Experts: What Counts in Accounting!](#)
- [3.15.2023: Podio Experts: How to automate your client intake process and more! with Joel Ordesky](#)
- [4.27.2023 What's new with Podio!](#)

Workflow Automation

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[Workflow Automation: Bulk Actions on Flows](#)

[Workflow Automation: Flow Version History](#)

[Workflow Automation: Getting Started with Workflow Automation](#)

[Workflow Automation: Logical Operators for Filters](#)

[Workflow Automation: My First Flow](#)

[Workflow Automation: PHP Calculation & Regex Examples](#)

[Workflow Automation: Plans and Limits](#)

[Workflow Automation: Refresh from Podio](#)

[Workflow Automation: Running a Flow Test](#)

[Workflow Automation: Selecting Field Tokens](#)

[Workflow Automation: The Flow Tree](#)

[Workflow Automation: Understanding the Hook Event](#)

[Workflow Automation: Using Collectors, Logic & Actions](#)

[Workflow Automation: Using Custom Variables](#)

[Workflow Automation: Using Filters](#)

[Workflow Automation: Using Flow Triggers](#)

[Workflow Automation: Using PHP Calculations](#)

[Workflow Automation: Using the Manual Run](#)

[Workflow Automation: Using the Workflow Automations Logs](#)

[Workflow Automation: Wait Delay](#)

[Workflow Automation: Webhooks](#)

[Workflow Automation: Whitelist IP Addresses](#)

[Workflow Automation: How to Search by Flow ID or Flow Name](#)

[Video: Podio Workflow Automation Tutorial](#)

Triggers

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[Workflow Automation: Trigger a Manual Flow](#)

[Workflow Automation: Trigger an email reply](#)

[Workflow Automation: Trigger an External Link](#)

[Workflow Automation: Trigger a Text Reply](#)

[Workflow Automation: Trigger by a Date Field](#)

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Filters

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[Workflow Automation: Filter: Comment Match](#)

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Actions

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[Workflow Automation: Create a Comment](#)

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[Workflow Automation: For Each Item](#)

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[Workflow Automation: Remote HTTP Call](#)

[Workflow Automation: Search for Item\(s\)](#)

[Workflow Automation: Send a Message](#)

[Workflow Automation: Share a Podio Item](#)

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Get Actions

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[Workflow Automation: Get Podio View](#)

[Workflow Automation: Get Previous Revision](#)

[Workflow Automation: Get Referenced Item\(s\)](#)

Update Actions

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[Workflow Automation: Update All Referenced Items](#)

[Workflow Automation: Update Collected Items](#)

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Sending emails, PDFs, and texts

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[Workflow Automation: Advanced Formatting of PDF and Detail Table](#)

[Workflow Automation: Make a PDF](#)

[Workflow Automation: Send an email](#)

[Workflow Automation: Images](#)

Chart, Reporting, and Tables

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[Workflow Automation: Advanced Charting Actions](#)

[Workflow Automation: Using Chart Flows](#)

[Workflow Automation: Create a Detail Table](#)

ShareFile Integration

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[Workflow Automation: Add User to ShareFile Folder](#)

[Workflow Automation: Create New ShareFile Folder](#)

[Workflow Automation: Retrieve Signed RightSignature Documents](#)

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[Workflow Automation: Save current Item File\(s\) to ShareFile](#)

[Workflow Automation: Send a RightTemplate](#)

[Workflow Automation: Send E-Sign Contract via RightSignature](#)

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[Workflow Automation: ShareFile Integration](#)

[Workflow Automation: Using RightSignature Text Tags](#)

[Video: Podio Workflows](#)

Other

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[Workflow Automation: Build Excel Sheet](#)

[Workflow Automation: Creating Data Feeds](#)

[Workflow Automation: Display Page](#)

[Workflow Automation: Exporting and Importing Flows](#)

[Workflow Automation: External CMS Page](#)

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Troubleshooting

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[Workflow Automation: OAuth Expired](#)

[Workflow Automation: Podio Apps and Interacting Flows](#)

[Workflow Automation: Simulate Vars - Debug Complex Calculations](#)

[Workflow Automation: Throttling Webhooks](#)

[Podio Workflow Automation: PHP Upgrade Changes](#)

[Workflow Automation: Errors and Troubleshooting Tips](#)

[Workflow Automation: Podio Permissions Error](#)

Labs

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[Workflow Automation: Project Management App Pack](#)

[Workflow Automation: Sales Management App Pack](#)

[Workflow Automation: Timesheets Done Right Set-up Guide](#)

[Workflow Automation: Prevent Duplicate Entries in Podio](#)

Using Podio

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Managing members

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Upgrade and billing

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Creating apps

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- [Adding Unique IDs to your app items](#)
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Workspaces and organizations

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- [Home and workspace tiles](#)
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- [Managing your Podio organization through ShareFile](#)
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Invitations and contacts

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- [Using a Contacts app/Importing Contacts](#)
- [How to convert a standard app to **Contact** app type](#)
- [Removing contacts](#)

Tasks

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Notifications

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- [Managing notifications](#)
- [Important update to your email settings](#)

Account and Profile

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- [Updating and editing your profile](#)
- [Two-Step Verification](#)
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Calendar

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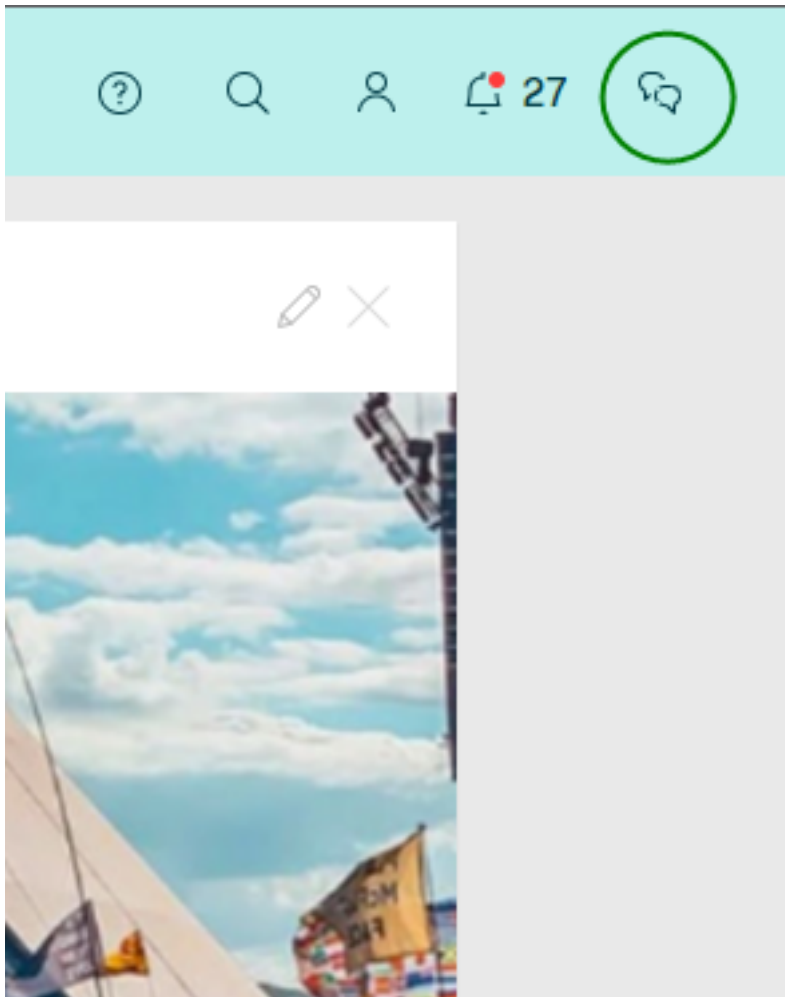
- [Overview of calendars](#)
- [Using the Podio Calendar with other Calendars](#)

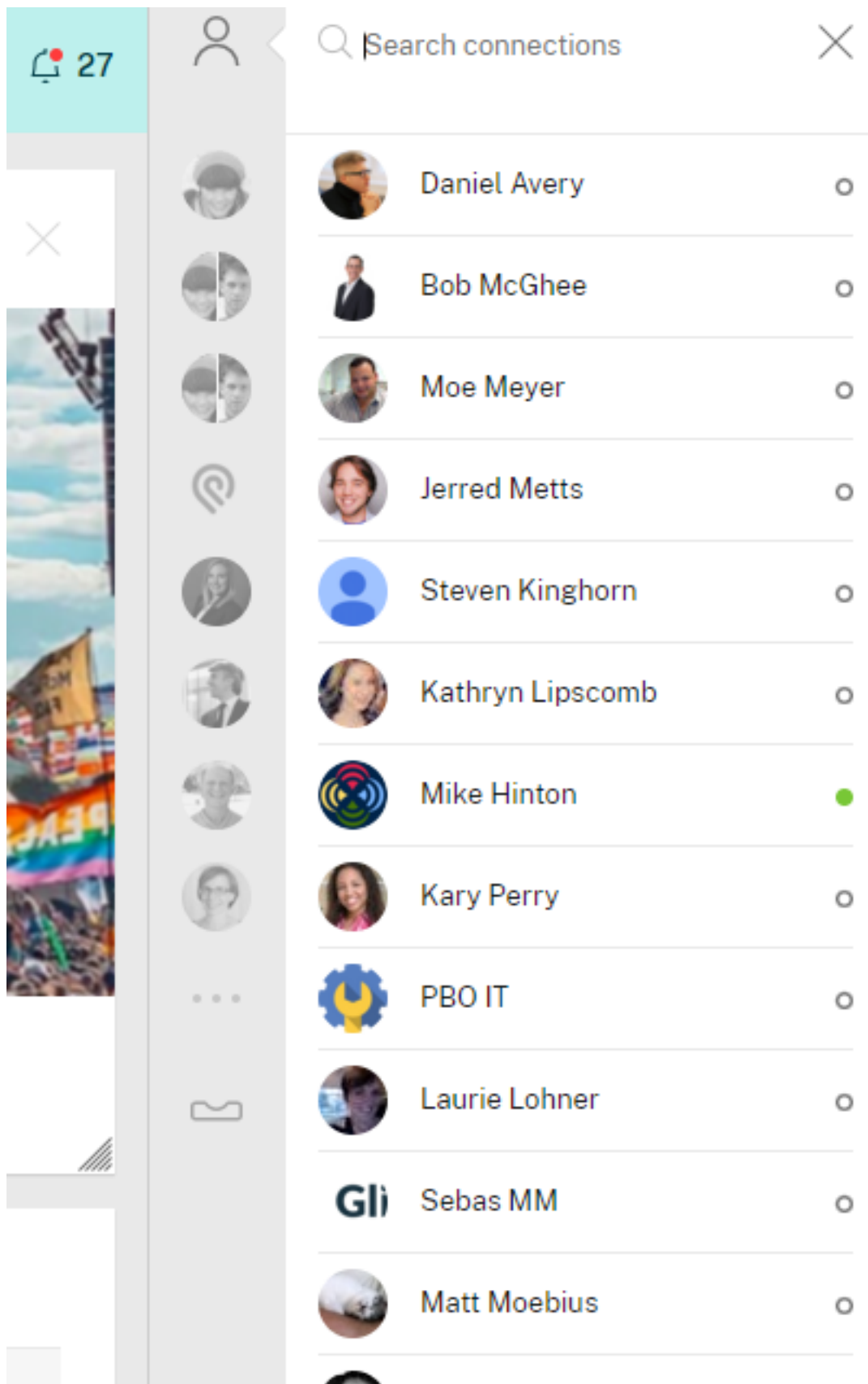
- [Using the Calendar Settings](#)
- [Color coding your calendar events](#)
- [Exporting your Podio Calendar to Microsoft Exchange](#)

Messages / Chat

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You receive incoming messages in the chat pane on the right. You can close the pane if you want more room for content when you're not in a conversation - Podio will alert you about incoming messages and open the pane once you click a notification. You can open and close the pane from the upper right corner or with the keyboard shortcut "C".

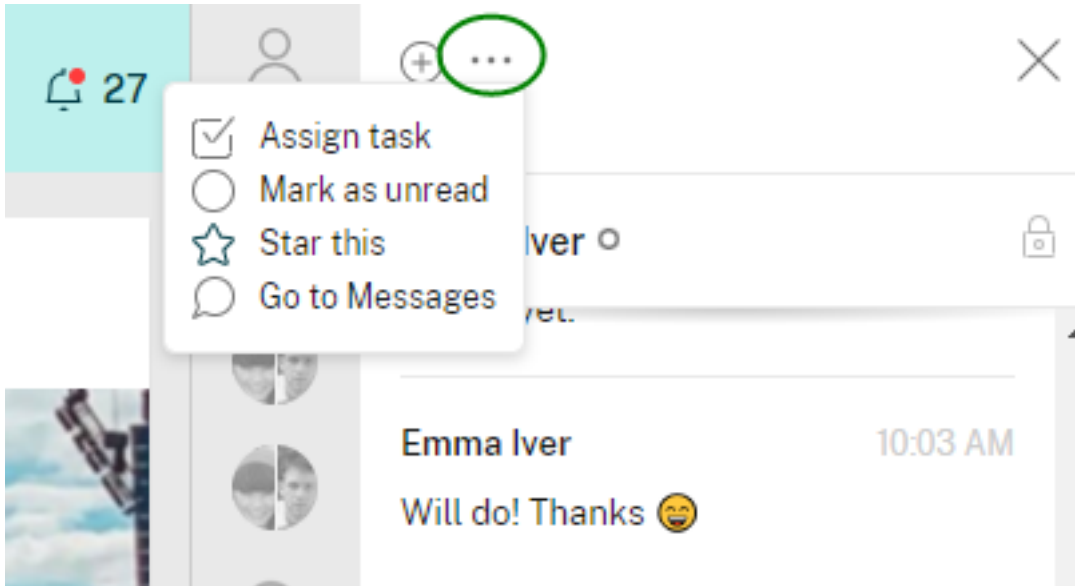




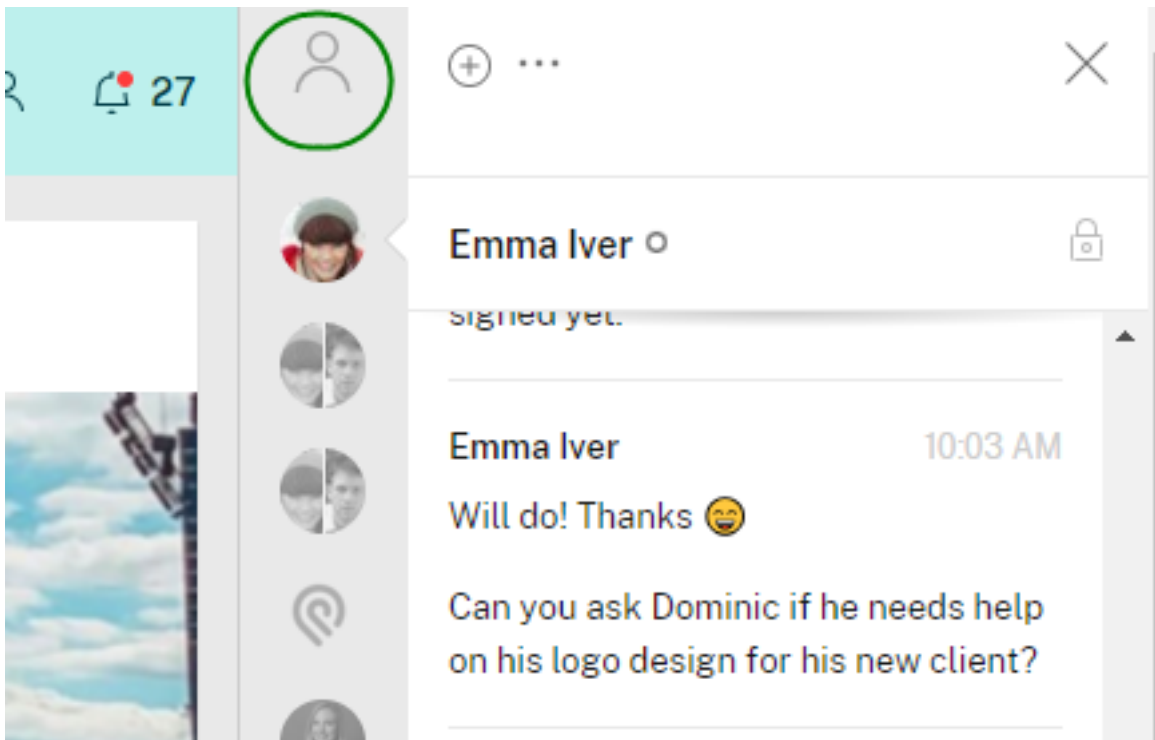
The screenshot shows the Podio search interface. At the top left, there is a notification bell icon with the number 27. Below it is a vertical sidebar with a close button (X) and a photo of a crowd. The main search area has a search bar with the text "Search connections" and a close button (X). Below the search bar is a list of search results, each with a profile picture, a name, and a status indicator (a small circle). The results are as follows:

Profile Picture	Name	Status Indicator
	Daniel Avery	○
	Bob McGhee	○
	Moe Meyer	○
	Jerred Metts	○
	Steven Kinghorn	○
	Kathryn Lipscomb	○
	Mike Hinton	●
	Kary Perry	○
	PBO IT	○
	Laurie Lohner	○
	Sebas MM	○
	Matt Moebius	○

You can go to a larger view of all your messages from the open pane via the inbox icon below your recent conversations. Here you'll also find tabs for viewing your unread and starred conversations.



Starting or continuing a conversation is as easy as clicking an existing one, or hitting the People tab to find a person to talk to.



Messages are delivered in real-time. Push notifications for Android and iOS will let people know you've messaged them.

One-on-one conversations will be a continuing conversation. If you need to break out of that to write

a message on something specific, just create a new message with a subject and this will be a separate conversation. Same thing goes for group conversations: These will always trigger a new conversation.

We'll notify you of new messages if you have the messages pane closed or if you are offline. Email settings can be set separately. If you are in a conversation, we suppress notifications, including push notifications to your mobile device.

Using email with Podio

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- [Email to item](#)
- [Email to app](#)
- [Create tasks from email](#)
- [Create a status from email](#)

Mobile

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- [Mobile Device - Feature Parity Reference](#)
- [Applink settings for Podio for Android](#)
- [Finding the Android and iPhone apps](#)
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- [Logging in to mobile apps with Google accounts](#)

Podio and other services

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- [Using GIFs with Giphy](#)
- [Overview of integrations](#)

- [Podio API](#)
- [ShareFile and Podio](#)
- [Google Drive and Podio](#)
- [Twilio SMS Communications App Pack](#)
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- [Zapier - Saving new Google Calendar events as Podio items](#)
- [Zapier - Creating new Podio items from Trello cards](#)
- [Zapier - Creating new Podio items from Wufoo entries](#)
- [Zapier - Adding new Podio tasks to Todoist as new tasks](#)
- [Zapier - Saving new Podio items as Google Sheets rows](#)
- [Zapier - Getting Slack notifications for new Podio items](#)
- [Zapier - Sending an Email from Gmail to contacts who fill out your Podio forms](#)
- [Zapier - Creating personalized Documents from Podio with WebMerge](#)
- [Zapier - Parsing Emails into Podio](#)
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- [Box and Podio](#)
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- [OneDrive and Podio](#)

Third party extensions

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- [Advanced Webforms](#)
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- [Quickbooks and Podio](#)
- [TimeCamp and Podio](#)
- [SmartGantt and Podio](#)

Tips and Tricks

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- [Top 10 Best Practices for Podio Workflow Automation](#)
- [Known limitations in Podio](#)
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- [Workflow Automation: Send E-Sign Contract via RightSignature](#)
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- [Using Notifications and Activity Stream](#)
- [Showing or hiding fields in an app](#)
- [When Is Best to Task, Message or Comment?](#)

Frequently asked questions

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- [I forgot my password - how can I login?](#)
- [Where is data hosted?](#)
- [Where can I see the operational status of Podio?](#)
- [Can I send email to/from Podio?](#)
- [How do I change the currency in an app?](#)
- [Should I use one workspace for my projects, or a workspace for each project?](#)
- [How do other teams use Podio?](#)
- [Can I have a white-label version of Podio?](#)
- [How do I delete data?](#)
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Pre-Built App Packs

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- [Real Estate Investment App Pack](#)
- [Workflow Automation: Sales Management App Pack](#)
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- [Request List App Pack](#)
- [IT Service Case Management App Pack](#)



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