



# 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](#)
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### 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](#)
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- [No Office. No Employees. No Email. How Makeshift Produces Their Brilliant Magazine](#)

## Knowing Podio

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## **Case studies: Marketing and Team Management**

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## 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](#)
- [09.30.15 Podio Marketing 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: Refresh from Podio](#)



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[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](#)

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## Calendar

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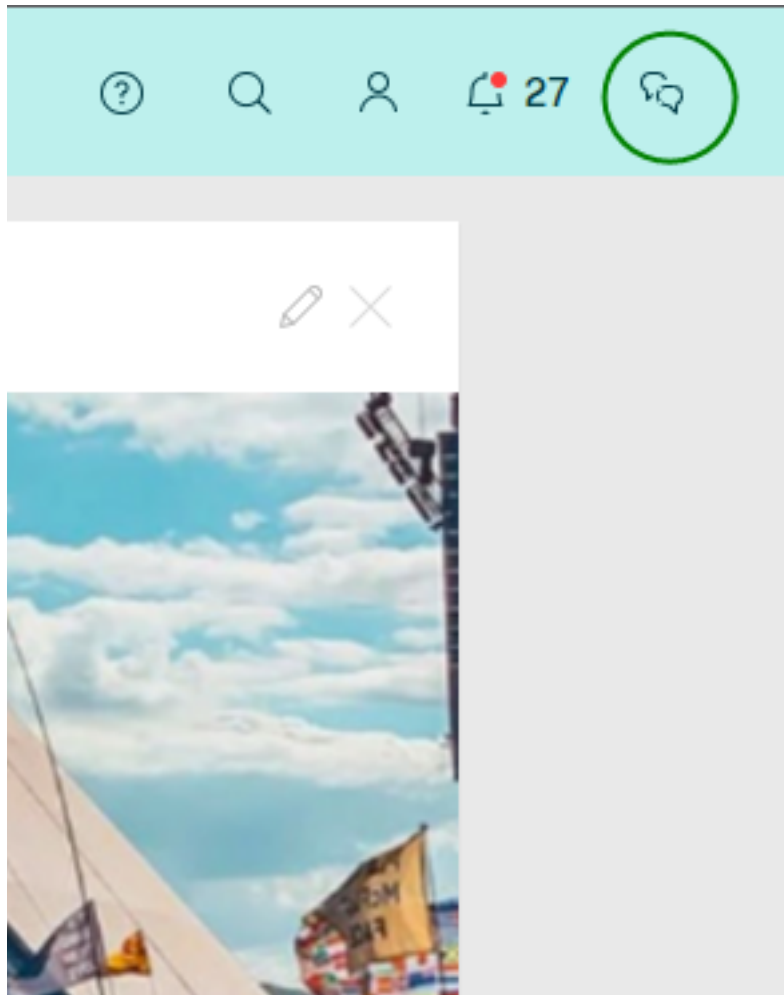
- [Overview of calendars](#)
- [Using the Podio Calendar with other Calendars](#)

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- [Color coding your calendar events](#)
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## Messages / Chat

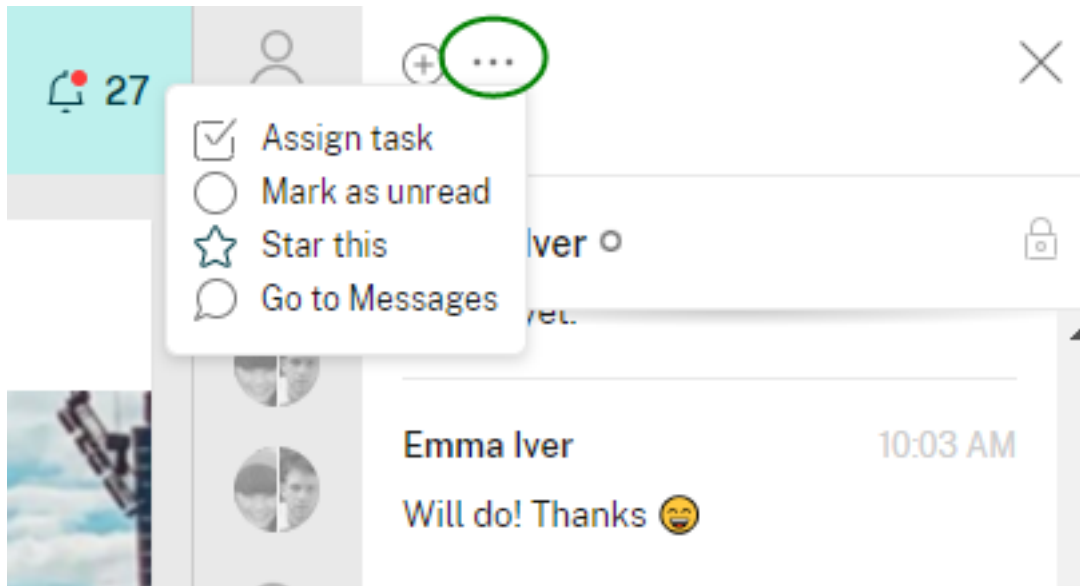
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You receive incoming messages in the chat pane on the right. You can close the pane if you want more room for content when you're not in a conversation - Podio will alert you about incoming messages and open the pane once you click a notification.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

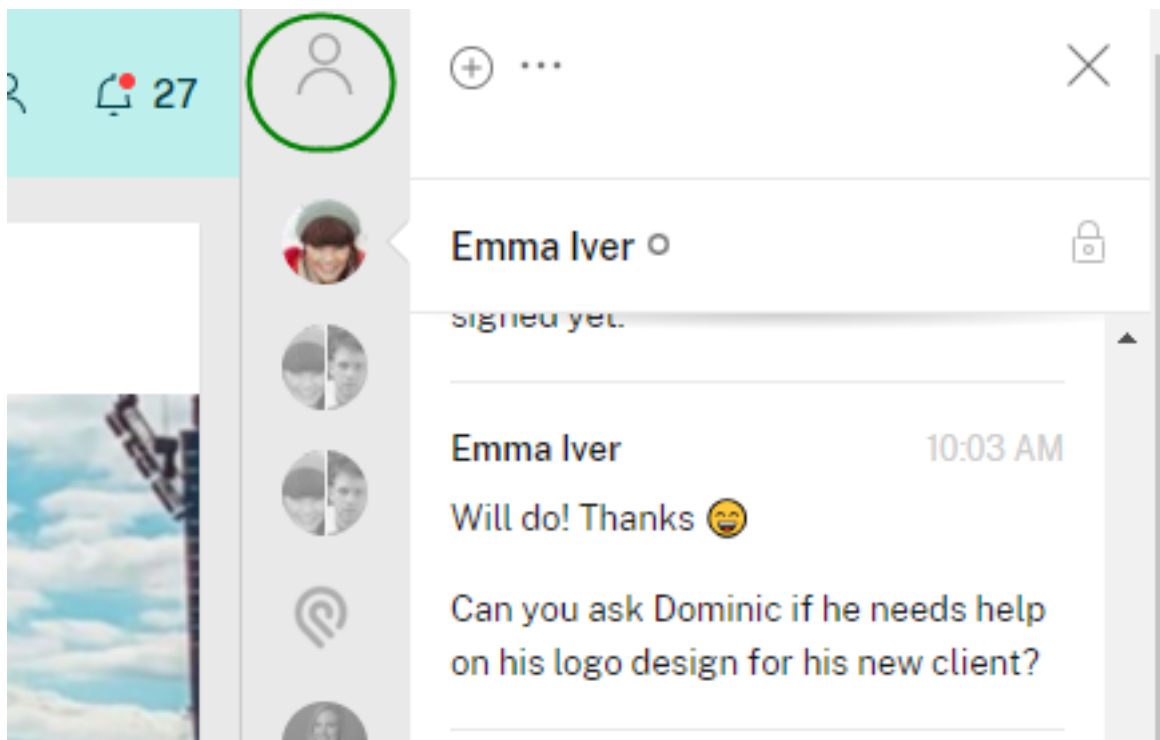


A screenshot of a mobile application interface. At the top, there is a search bar with a magnifying glass icon and the text "Search connections". Below the search bar is a list of contacts or connections. Each entry consists of a circular profile picture, a name, and a small circular status indicator on the right. The contacts listed are: Daniel Avery, Bob McGhee, Moe Meyer, Jerred Metts, Steven Kinghorn, Kathryn Lipscomb, Mike Hinton, Kary Perry, PBO IT (with a gear icon), Laurie Lohner, and Sebas MM. On the left side of the screen, there is a vertical sidebar. It features a close button (an 'X' icon) at the top, followed by a vertical strip of images, including a flag and a crowd. Below the images are three dots and a folder icon. The bottom of the screen shows a portion of a keyboard.

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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