

# Best Practices

## Getting Started in Conceptboard

Hit the right arrow  on the keyboard to get started!

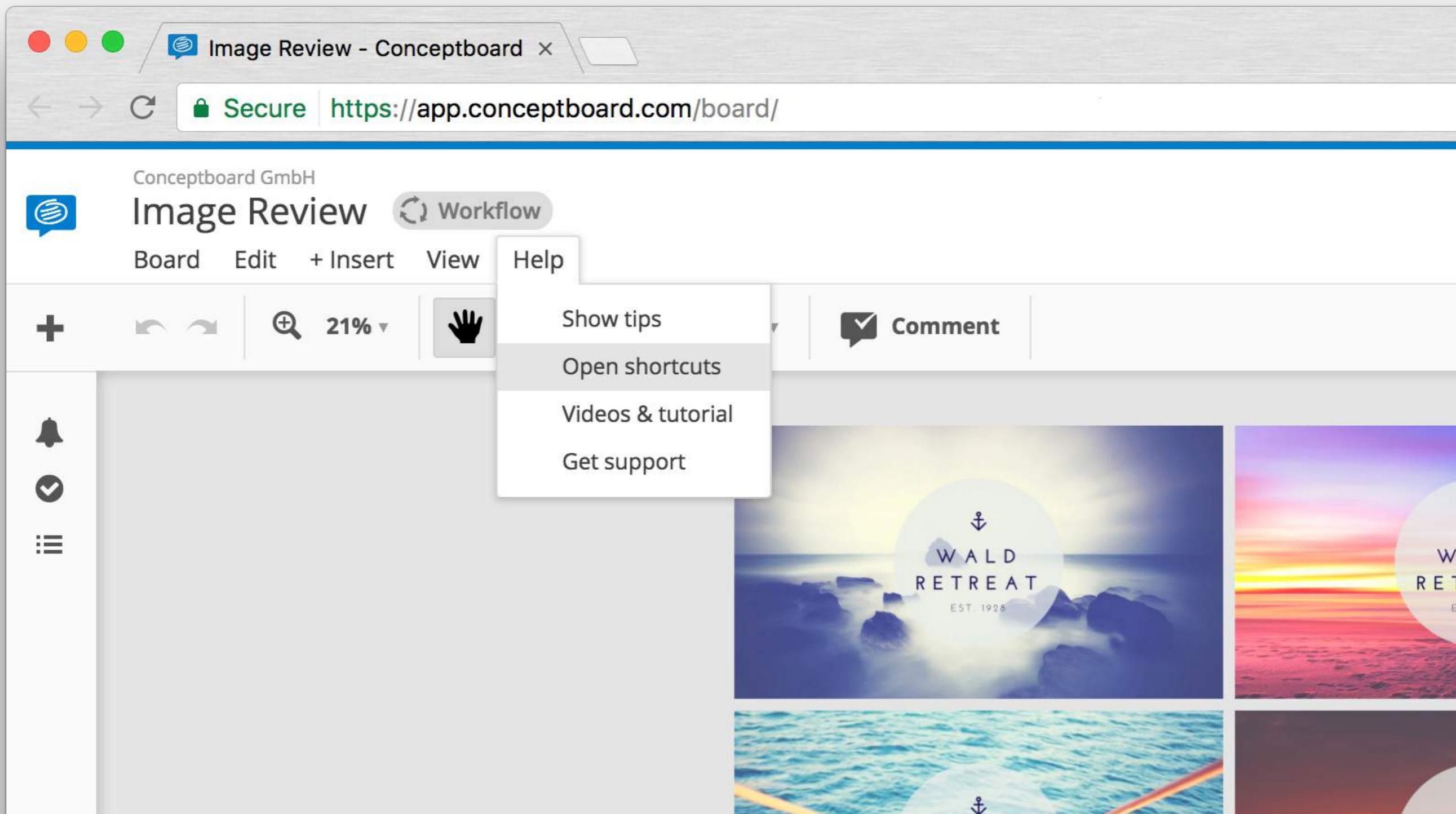
# A visual tool for your visual work

- Conceptboard is a **visual collaboration platform** for working with your team and clients from across the world.
- Boards are **flexible online whiteboards** that adapt and expand to your needs. Capture ideas, brainstorm, create moodboards, get feedback, plan initiatives, and map out strategies.



# 1a. Learn to work with scale

Zoom out to see the big picture, zoom in to see the detail.  
Try out all the shortcuts to make navigation feel like second nature.



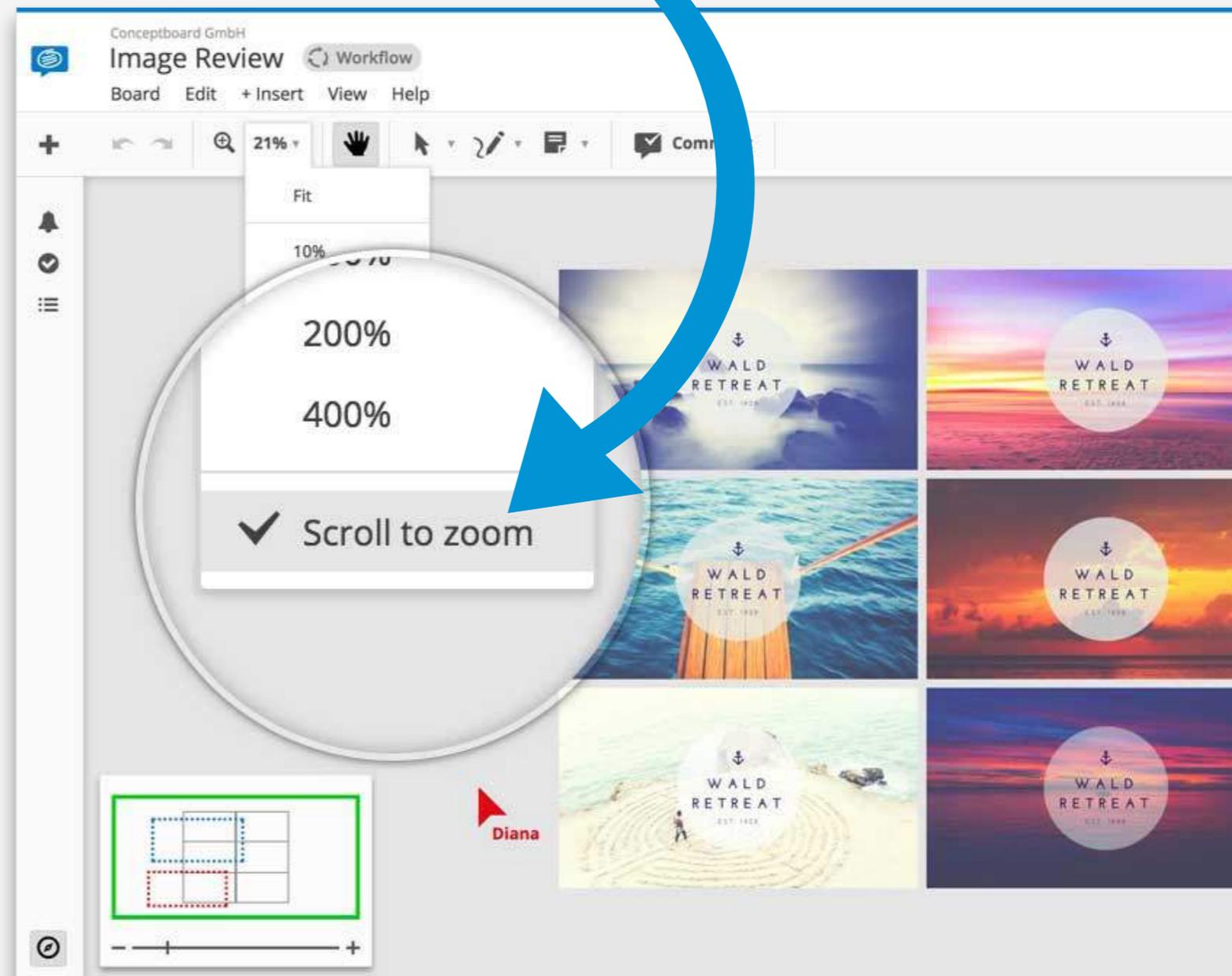


# 1b. Learn to work with scale

In any tool mode, press and hold **Spacebar** to use the Move tool.  
If you prefer using the trackpad, turn off “Scroll to zoom”, and use two fingers to pan.

## Basic Zoom Shortcuts

+	Zoom in
-	Zoom out
1	100% zoom
0	Fit content to view





# 2a. Keep organized

Use Projects to keep work organized and easily share it with your teammates. See active users and pending approvals directly from your boards overview.

The screenshot shows the Conceptboard interface for a user named Ben. The main header includes the Conceptboard logo, the organization name 'CoolBrandCo', and a notification bell with 7 alerts. The left sidebar contains navigation options: Home, Boards, and a list of Projects including Marketing (78), Content Creation (57), Customer Support (40), Example Boards (34), Sales conference (4), and Training (9). There is also a '+ Create a project' button and links for Archive, Users, and Account.

The main 'Boards' section features a search bar and filters for 'ALL', 'LAST MODIFIED', and 'SHOW PROJECTS'. It displays a grid of boards:

- Image Review**: 4:14 PM · 0.4 m<sup>2</sup>. Status: Pending approval. Shows a collage of images with the text 'WALD SPREIZEN' and three user avatars.
- Journey Map**: 11:25 AM · 15.6 m<sup>2</sup>. Status: Pending approval. Shows a flowchart diagram.
- Campaign Review**: 11:25 AM · 15.6 m<sup>2</sup>. Status: Approved. Shows a collage of images.
- Example Boards\_Or...**: Status: Approved. Shows a grid of various board thumbnails.



# 2b. Keep organized

You can add sticky notes, scribbles, images, pdfs, and embed videos all in the same board. Use sections to map out steps in your workflow.

The screenshot displays a Conceptboard interface for a project titled "April Release". The board is organized into three vertical columns representing different stages of a workflow: "FIRST DRAFT" (blue background), "SECOND DRAFT" (orange background), and "FINAL" (green background). Each column contains a vertical stack of design mockups for a website or application. The "FIRST DRAFT" column includes a large central area with various charts, maps, and text blocks, indicating a more detailed and complex initial design. The "SECOND DRAFT" and "FINAL" columns show progressively simplified and refined versions of the design. The interface includes a top navigation bar with "Board", "Edit", "+ Insert", "View", and "Help" options, and a right-hand side with a "Share" button and user avatars. A toolbar at the top left provides editing tools like zoom (7%), pan, and comment. A vertical sidebar on the left contains navigation icons. A red arrow labeled "Steve" points to the bottom of the "FIRST DRAFT" column, and a green arrow labeled "Diana" points to the right side of the "FINAL" column.



# 3a. Work visually

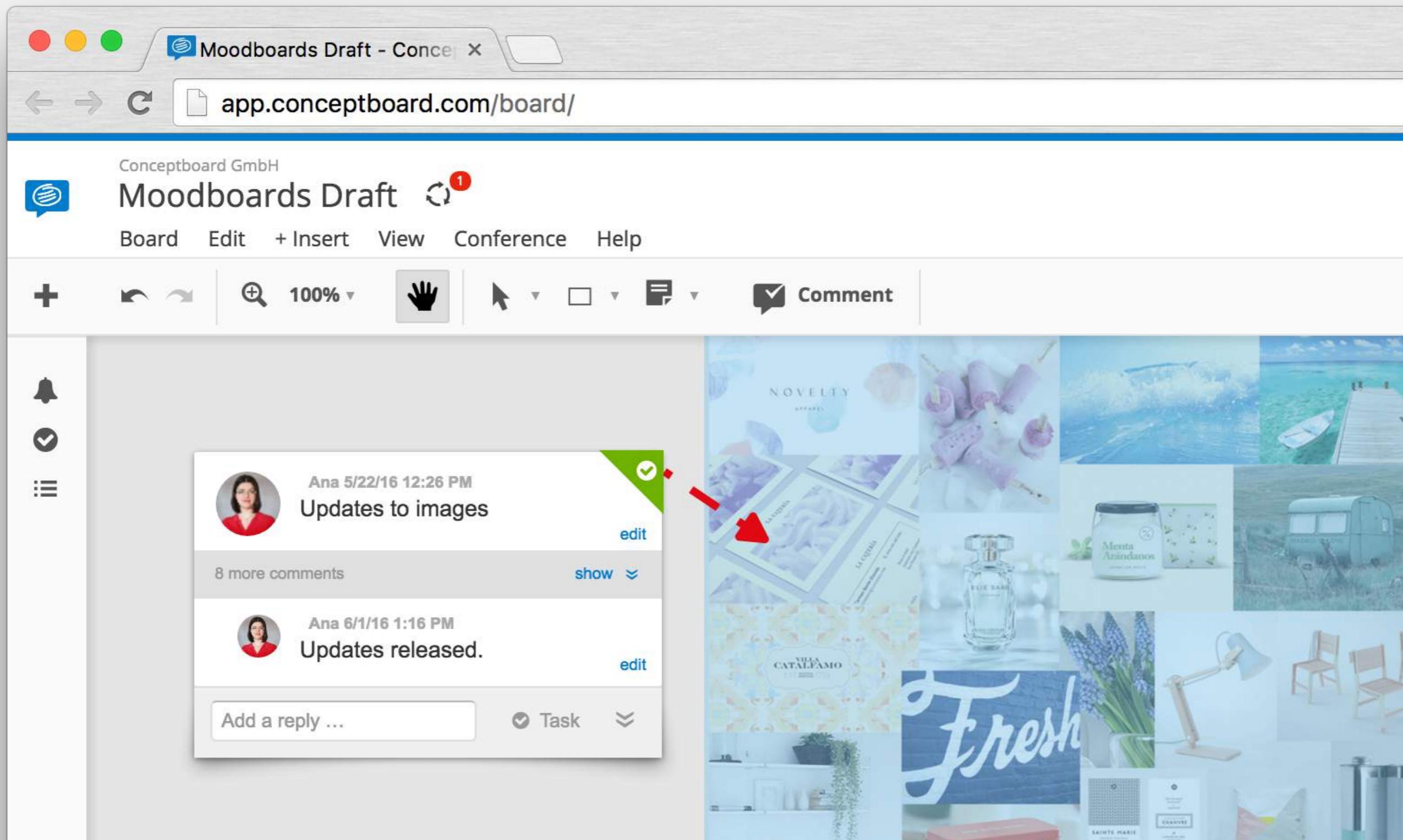
Use colors, images, and markup to communicate visually with your team.  
Group content and connect similar ideas using arrows/sections.

The screenshot displays the Conceptboard interface for a "Remote Brainstorming Session". The top navigation bar includes the company name "Conceptboard GmbH", the session title, a "Workflow" button, and user avatars for "Ana" and "Share". A secondary menu contains "Board", "Edit", "+ Insert", "View", and "Help". The main toolbar features icons for zooming (set to 15%), panning, selecting, erasing, and commenting. On the left, a "SECTIONS" sidebar lists "Round 1", "Round 2", "Discuss Further", "Rejected", and "Round 3", with a "create a new section" button. The main workspace is divided into three panels: "ROUND 1" (a dark grey board with various colored sticky notes), "ROUND 2" (a dark grey board with sections titled "DISCUSS FURTHER" and "REJECTED" containing sticky notes), and "ROUND 3: Idea Exploration" (a white board with a flowchart diagram involving nodes labeled "Steve", "Provider", "1", "2", "3", "4", and "Diana", connected by arrows and a dashed oval).



# 3b. Work visually

Keep iterations in the same board to show the process from the initial idea to the final draft. Collapse finished discussions to visually mark solved comments.





# 4a. Collaborate and share

Built for both asynchronous communication and real-time collaboration. Start a presentation, audio chat, or a screen-share directly in the board. Changes get saved in real-time.

The screenshot displays a Miro collaboration board titled "Fattelo Lamp Prototype" under the organization "CoolBrandCo". The interface includes a top navigation bar with "Board", "Edit", "+ Insert", "View", "Conference", and "Help" menus. A toolbar below the navigation bar contains icons for undo, redo, zoom (set to 100%), hand, mouse, eraser, and a "Comment" button. On the right side, there are icons for call, chat, and a "Share" button. The main workspace is divided into several sections:

- Left Panel:** A vertical sidebar with a notification bell, a checkmark, and a menu icon. A blue arrow points to a user named "Ben".
- Top Left:** A title "Fattelo Initial Lamp prototypes" with a red dashed arrow pointing to a chat window.
- Center:** A large blue grid containing a white line-art technical drawing of a lamp's components.
- Bottom Left:** A vertical stack of three photographs showing physical prototypes of the lamp. A red arrow points to the bottom photo, identifying a user named "Diana".
- Chat Window (Top Center):** A conversation with three messages:
  - Ben 7/14/14 1:11 PM: "@Steve @Diana the initial fattelo lamp prototypes are ready!"
  - Steve 7/14/14 1:15 PM: "Do we have the colored version prototypes as well?"
  - Ben 7/14/14 1:16 PM: "Yes, I'll add them below."
- Right Panel:** A video chat window showing a user named "Steve" and a woman. Below the video are controls for "Video chat", "Audio chat", and "Share screen".



# 4. Collaborate and share

Set access rights for Projects and Boards. Editors can edit/move all content. Reviewers can comment and add their own content. Readers can view the board to stay updated.

The screenshot displays the 'Share Empathy Map' dialog box in the Conceptboard interface. The dialog is split into two main sections: 'Invite users' and 'Send link'.  
In the 'Invite users' section, there is a search input field labeled 'Select users or start typing'. Below it are three radio buttons for role selection: 'Editor' (selected), 'Reviewer', and 'Reader'. An 'Optional message (shown in the board updates)' text area is present, followed by a blue 'Send Invitations' button.  
The 'Send link' section is titled 'Who has access' and shows a link sharing option set to 'Anyone with the link' with a role of 'Reader'. Below this, a list of users is shown: Ana (Conceptboard, Owner), Steve (CoolBrandCo), and Diana (CoolBrandCo). A circular callout highlights the role selection dropdown for a user, showing 'Editor' selected, with 'Editor' and 'Reviewer' as visible options.

# Next Steps

1. Grab one of our [pre-made templates](#).
2. Learn more about [real-time collaboration](#).
3. Check out other [Conceptboard guides](#).