

Best Practices

Getting Started in Conceptboard

Hit the right arrow  on the keyboard to get started!



Conceptboard

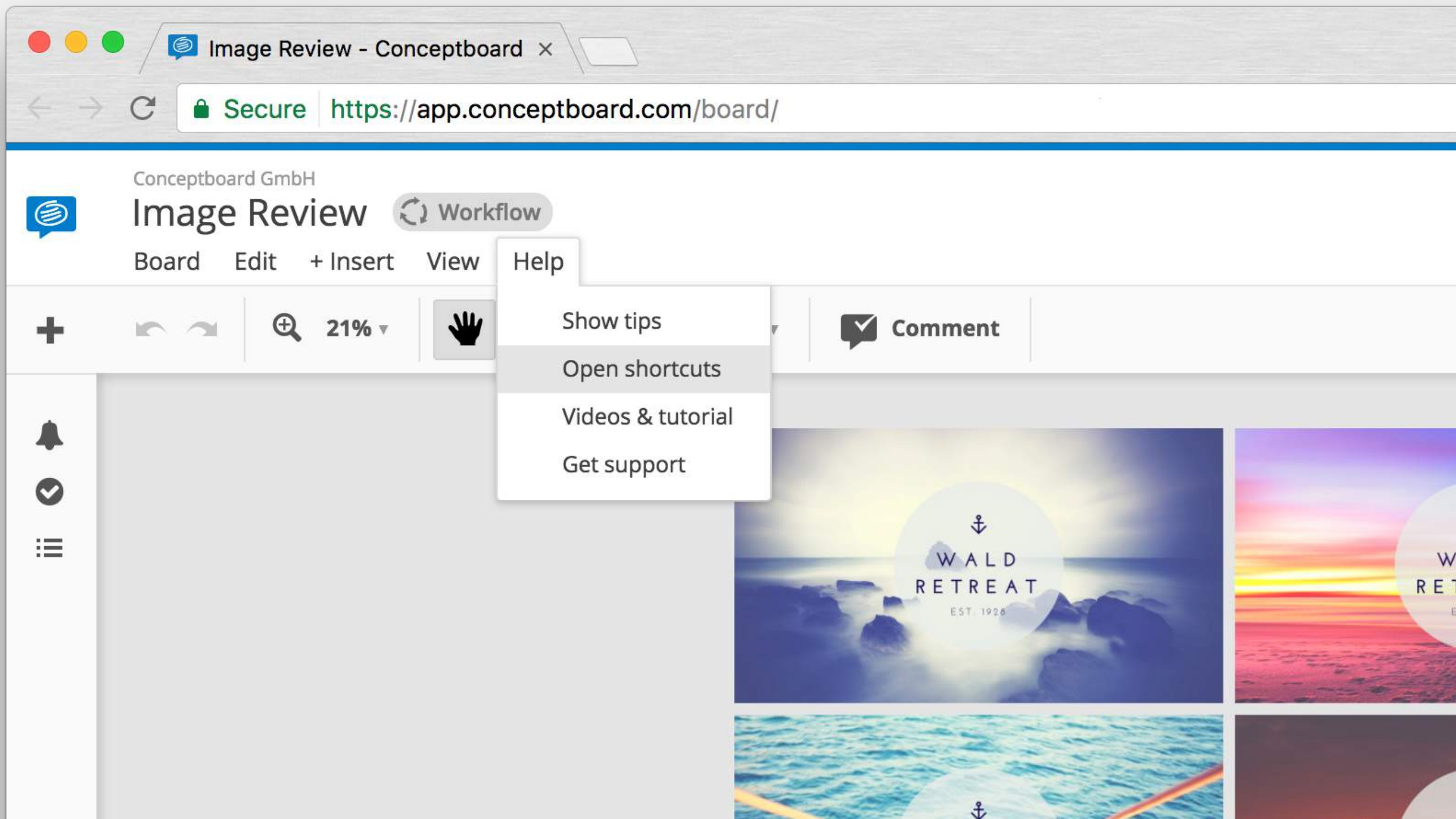
A visual tool for your visual work

- 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.



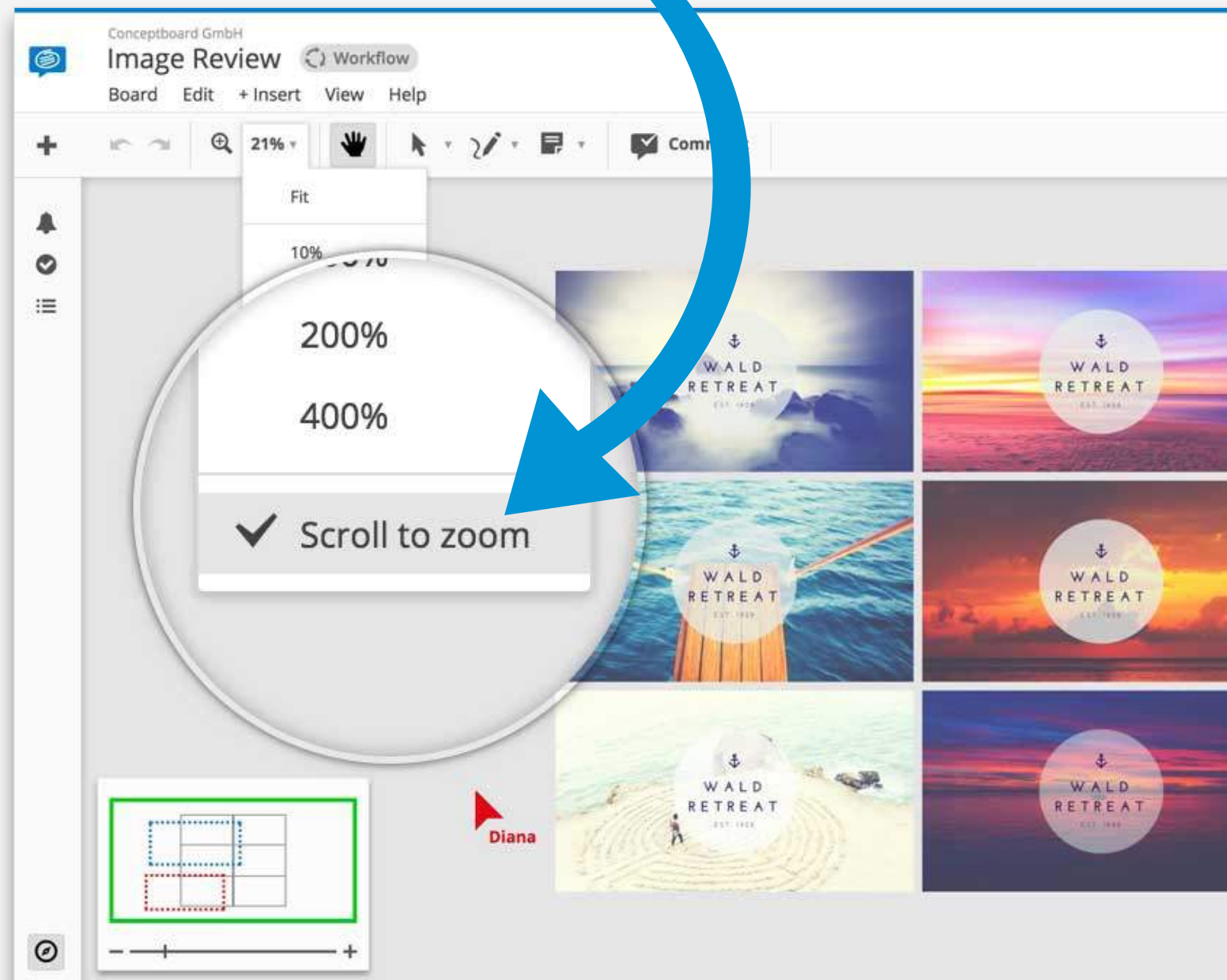


1b. Learn to work with scale

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 displays the Conceptboard interface for a user named Ben. The top navigation bar is blue and contains the Conceptboard logo, the company name "CoolBrandCo", and a notification bell with 7 alerts. The left sidebar is white and features a "+ NEW BOARD" button, a "Home" link, a "Boards" link, a "PROJECTS" section with a list of folders (Marketing, Content Creation, Customer Support, Example Boards, Sales conference, Training) and their respective board counts, a "+ Create a project" button, and links for "Archive", "Users", and "Account". The main content area is titled "Boards" and includes a search bar, filter buttons for "ALL", "LAST MODIFIED", and "SHOW PROJECTS", and a grid of board thumbnails. The thumbnails are categorized by status: "Pending approval" (orange header) and "Approved" (green header). The "Pending approval" category includes an "Image Review" board (4:14 PM, 0.4 m²) and a "Journey Map" board (11:25 AM, 15.6 m²). The "Approved" category includes a "Campaign Review" board (11:25 AM, 15.6 m²). Other visible thumbnails include a board titled "Example Boards_Or..." and a board titled "DISCUSS FURTHER".



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 the Conceptboard interface for a project titled "April Release". The top navigation bar includes the Conceptboard logo, the title "April Release", a "Workflow" button with a red notification badge, and a "Share" button. Below the navigation bar is a toolbar with various editing tools like a plus sign, undo, redo, zoom (7%), hand, selection, lasso, and a "Comment" button. The main workspace is divided into three vertical sections: "FIRST DRAFT" (blue background), "SECOND DRAFT" (orange background), and "FINAL" (green background). Each section contains a vertical stack of images and documents representing different stages of a workflow. A red arrow labeled "Steve" points to a document in the "FIRST DRAFT" section. A green arrow labeled "Diana" points to a document in the "FINAL" section. The interface also shows a sidebar on the left with a bell icon, a checkmark icon, and a menu icon, and a bottom status bar with a circular icon.



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 GmbH Remote Brainstorming Session interface. The top navigation bar includes the Conceptboard logo, the session title "Remote Brainstorming Session", a "Workflow" button, and user avatars for Ana, Steve, and Diana. The main toolbar features icons for adding content, undo, redo, zoom (15%), pan, select, lasso, and comment. A left sidebar shows a "SECTIONS" list with checkboxes for Round 1, Round 2, Discuss Further, Rejected, and Round 3, along 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 for "DISCUSS FURTHER" and "REJECTED"), and "ROUND 3: Idea Exploration" (a white board with a flowchart diagram involving nodes labeled 1, 2, 3, 4, and a "Provider" node, with arrows indicating connections and a dashed feedback loop between nodes 3 and 4).



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.

The screenshot displays the Conceptboard web application interface. At the top, a browser window shows the URL `app.conceptboard.com/board/`. The main header includes the Conceptboard GmbH logo, the board title "Moodboards Draft" with a refresh icon and a red notification badge, and navigation links: "Board", "Edit", "+ Insert", "View", "Conference", and "Help". Below the header is a toolbar with icons for adding content, undo/redo, zoom (set to 100%), pan, select, lasso, and a "Comment" button. On the left, a vertical sidebar contains icons for notifications, a checkmark, and a menu. The main workspace is filled with a moodboard collage of various images, including product packaging, landscapes, and interior design. A comment overlay is positioned on the left side of the workspace, showing two comments from user "Ana":

- Comment 1: "Updates to images" (dated 5/22/16 12:26 PM) with an "edit" link and a green checkmark icon.
- Comment 2: "Updates released." (dated 6/1/16 1:16 PM) with an "edit" link.

Below the comments is a text input field labeled "Add a reply ..." and a "Task" button. A red arrow points from the first comment to a specific image in the moodboard.



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 collaborative workspace titled "Fattelo Lamp Prototype" under the "CoolBrandCo" brand. The interface includes a top navigation bar with options like "Board", "Edit", "+ Insert", "View", "Conference", and "Help". A toolbar below the navigation bar offers various editing tools such as undo, redo, zoom (set to 100%), pan, and a "Comment" button. On the right side of the top bar, there are icons for video chat, audio chat, and a "Share" button, along with a list of active participants: Steve, Diana, and Ben.

The main workspace area is divided into several sections. On the left, a vertical sidebar shows a list of participants: Ben (with a blue arrow pointing to him) and Diana (with a red arrow pointing to her). The central workspace features a title "Fattelo Initial Lamp prototypes" above a vertical stack of three photographs showing different angles of a wooden lamp prototype. To the right of these photos is a large blue grid containing a white line drawing of the lamp's internal structure. A red dashed arrow points from a comment box to the top of the grid. The comment box, which is open, shows a conversation between Ben and Steve. Ben's message says "@Steve @Diana the initial fattelo lamp prototypes are ready!". Steve's response asks, "Do we have the colored version prototypes as well?". Ben's final reply is, "Yes, I'll add them below.".

On the right side of the workspace, there is a vertical stack of video chat windows. The top window shows Steve, and the bottom window shows Diana. Below the video chat windows are three buttons: "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 within the Conceptboard interface. The dialog is divided into two main sections: 'Invite users' and 'Who has access'.

Invite users section:

- Buttons: 'Invite users' (active) and 'Send link'.
- Input field: 'Select users or start typing' with a dropdown arrow.
- Role selection: Radio buttons for 'Editor' (selected), 'Reviewer', and 'Reader'.
- Text area: 'Optional message (shown in the board updates)'.
- Button: 'Send invitations'.

Who has access section:

- Link sharing: 'Anyone with the link' will access as: **Reader** (with a 'Change' button).
- Link: 'd.com/board/88b8-0ugs-r1nh-cbhd-4m8g' with icons for copy and QR code.
- User list:
 - Ana (Conceptboard) - Owner (with bell and close icons).
 - Steve (CoolBrandCo).
 - Diana (CoolBrandCo).

Access level dropdown:

- A circular callout shows a dropdown menu for the 'Editor' role, with options: 'Editor' (selected), 'Editor', and 'Reviewer'.

Next Steps

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



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