



ClickUp

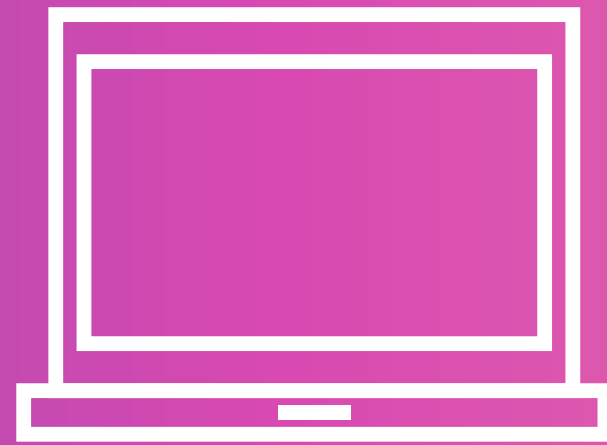
Basics

USER ROLES



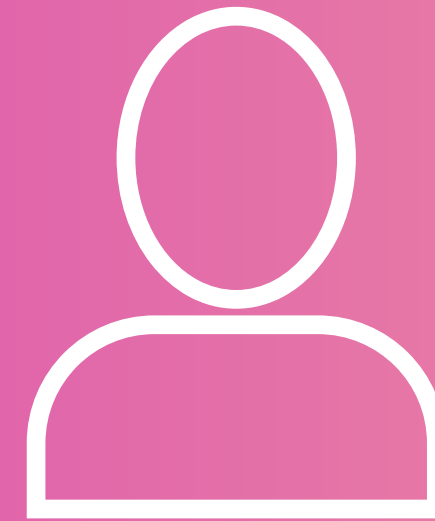
owner

Yourself
(person who created the
workspace)



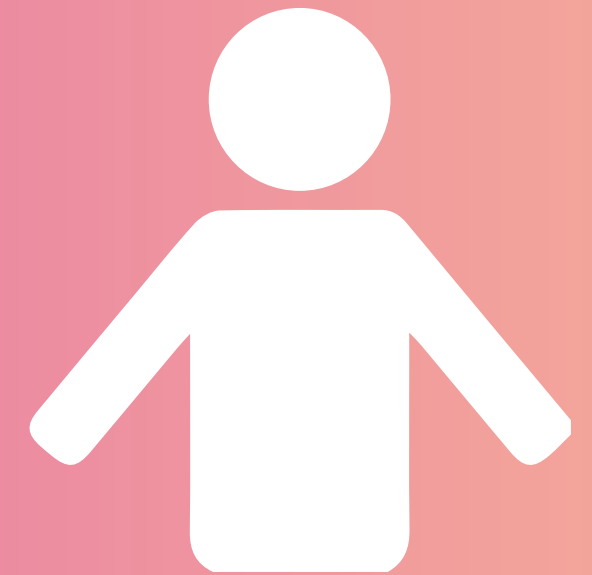
admin

Internal Management
Highly trusted to manage
your workspace
full access



member

Internal
Other employees or
trusted team members
medium access



guest

External
Vendors, Clients or
outside with limited
access

Free Forever Plan

- Unlimited tasks
- 100MB file storage
- 100 uses of Custom Fields
- 100 uses of Goals
- 100 uses of Portfolios
- 100 uses of Dashboards
- 100 Custom Views
- 400 Folders in a Space
- 100 Lists in a Space
- 100 Lists in a Folder
- 5 Spaces
- Create and edit Permissions
- Basic Reporting

Unlimited Plan

- Unlimited file storage
- Unlimited Spaces, Folders and Lists
- Cloud storage integrations
- Advanced Reporting
- Unlimited Custom Fields
- Unlimited Goals
- Unlimited Portfolios
- Unlimited Views
- Unlimited Dashboards
- List View Column Calculations
- Delegate Reminders
- Gantt View
- Box View
- Form View
- Advanced member and guest Permissions
- Unlimited read-only guests
- Future Recurring Tasks on Calendar
- Restrict guest visibility for Time Estimates, Time Tracked, Tags, and Custom Fields
- 5 permission controlled guests + 2 additional per Workspace member

Business Plan

- Everything in the Unlimited Plan plus:
- Two Factor Authentication (2FA)
- Google Single Sign On (SSO)
- Share Portfolios
- Goal Folders
- List View Exports
- Protect Views
- Workload Chart
- Set Default Views
- Personal Views
- Forms branding, customization, and field options
- All Dashboard widgets
- Unlimited Critical Path calculations
- 10 permission controlled guests + 5 additional per Workspace member

Enterprise Plan

- Everything in the Business Plan plus:
- Single Sign-On (SSO)
- Contract review & HIPAA
- Increased API limits
- Custom onboarding
- Dedicated success manager
- Advanced permissions

ACCESS



WEB BROWSER



DESKTOP

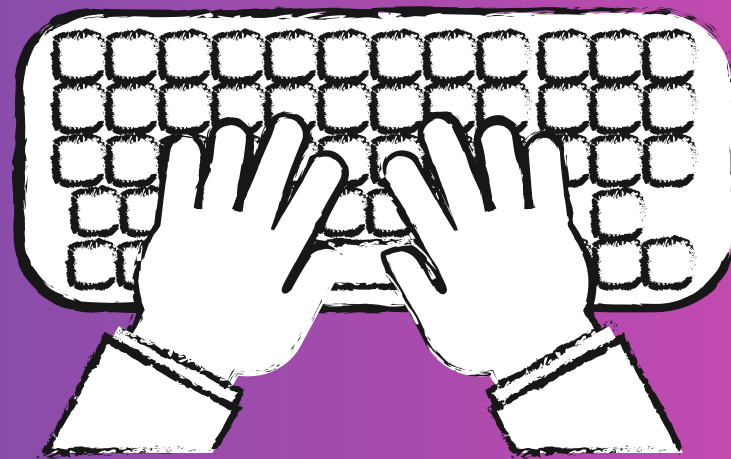
iOS

iPAD & iPHONE

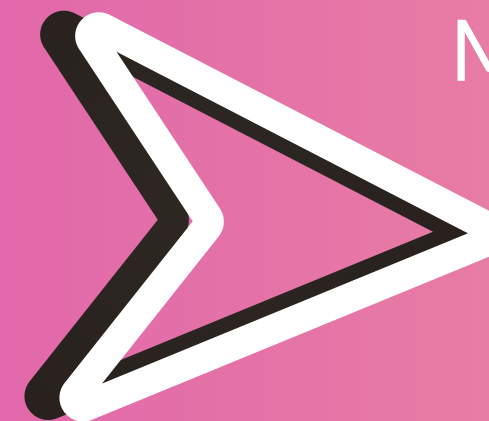
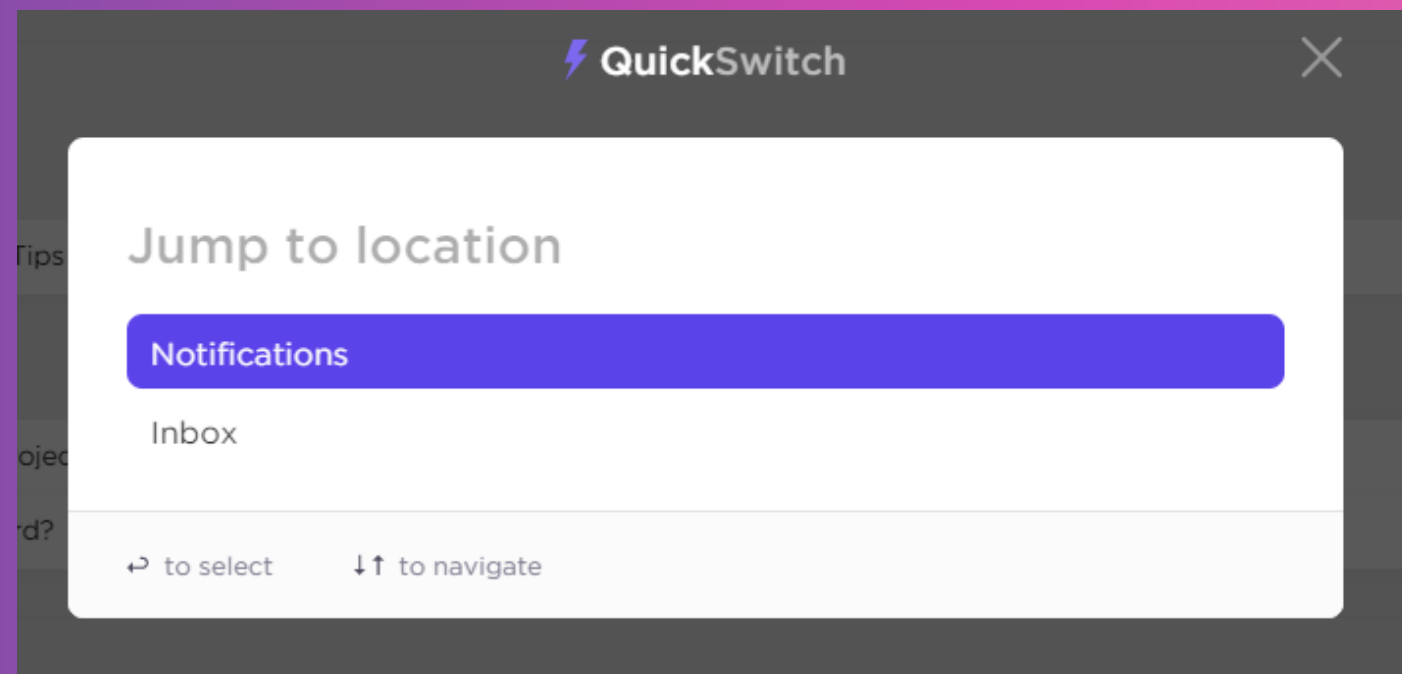


ANDROID

QUICKSWITCH



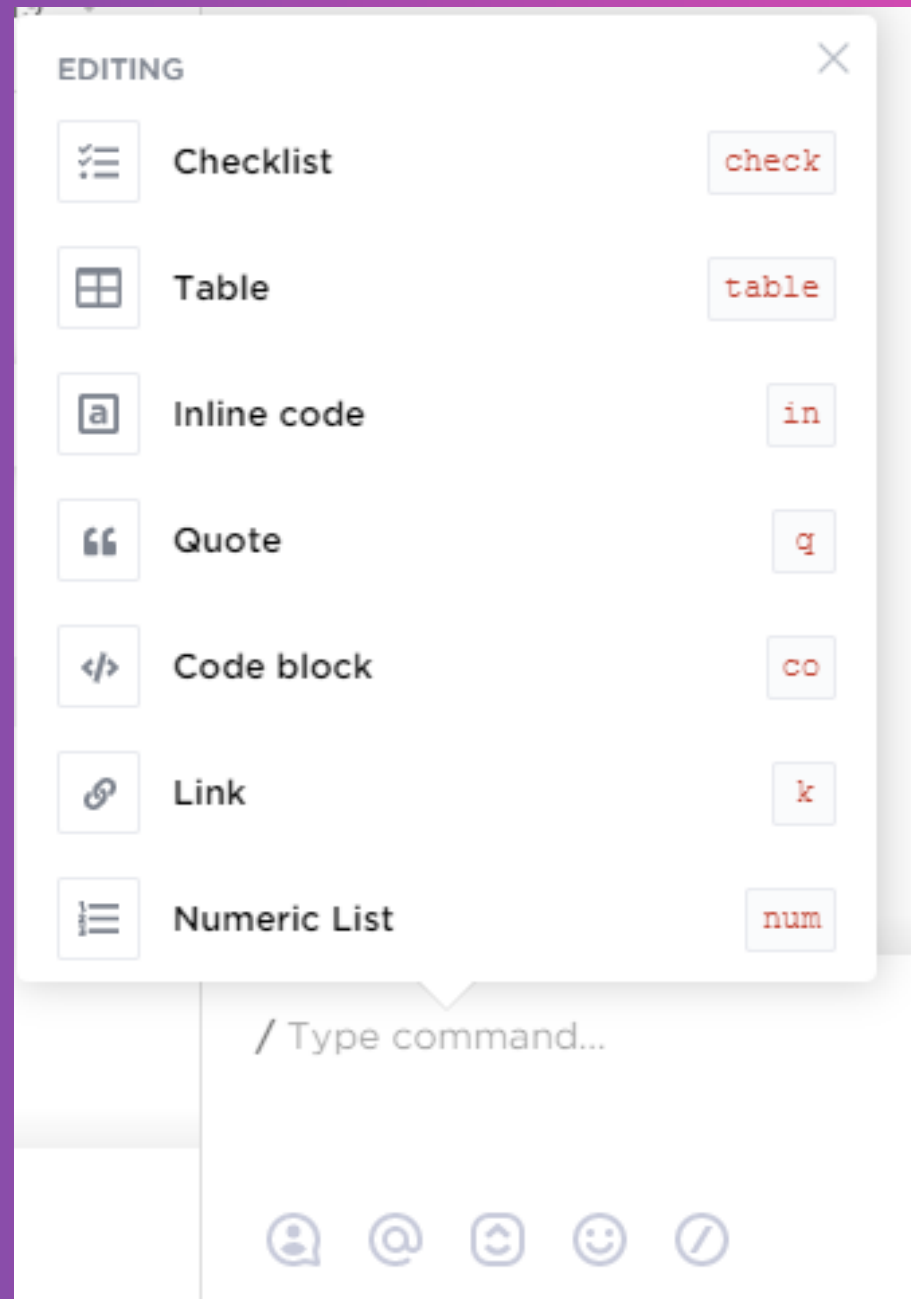
Keyboard navigation by pressing the letter K or



Move quickly between:

- Spaces
- Folders & Lists
- Views
- Inbox & Profiles

SLASH COMMANDS



Use / with the quick switcher for more powerful navigation!

Pro Tips:

- Type / me to quickly assign a task to yourself
- Type /closed to quickly close a task (or just use / cl to be even faster) this also works for /done and /complete
- You can use space or enter to select a command
- You can use tab or the arrow keys to browse through commands
- In a task, create subtasks super quick by typing / -

VIEWS

Task Views

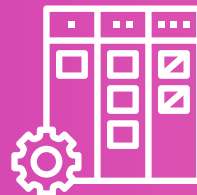
See all your data from different angles

List



Best for sorting, filtering, grouping and customizing columns

Board



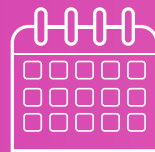
Best for visually seeing status and whats next

Box



Best for managing workload

Calendar



Best for planning and scheduling

Gantt



Best for dependencies and project mapping

Page Views

For adding/gathering more information and references

DOC



Best for creating and sharing SOPs and other knowledge bases

Conversation



Best for chatting in real-time about tasks with your team

Embed



Best for linking outside apps & websites directly inside your ClickUp

Form



Best for gathering, organizing and collecting new data



ClickUp

Basics

To learn more about a specific topic, click on the individual pages.