

MeisterTask Setup Guide for Vocational Education and Training

This step-by-step guide explains how to set up and use MeisterTask effectively in a vocational education context. It is designed for teachers, trainers, and learners who want to organize projects, collaborate efficiently, and develop self-management skills.

1. Create an Account

Go to www.meistertask.com, click "Sign Up for Free", and register with your email or Microsoft/Google account. Choose the Free plan to start.

2. Create a New Project

Click 'New Project', name it (e.g., 'Retail Training 2025'), and choose a color theme. You'll see a Kanban-style board with default sections (Open, In Progress, Done).

3. Customize Columns

Rename sections to fit your training workflow, e.g. To Do, In Progress, Review, Done. Right-click a section name to rename or add new ones.

4. Add Tasks

Click '+ Add Task' to create assignments. Include a title, description, checklist, attachments, and due date. Assign tasks to specific learners or teams.

5. Invite Team Members

Use the 'Project Members' button (■) to invite learners or colleagues via email. Assign roles: Member (edit) or Viewer (view only).

6. Communication & Feedback

Use comments inside each task for feedback or discussion. Add files, checklists, and notes directly to tasks for transparency.

7. Track Progress

The Dashboard shows which tasks are open, in progress, or done. Use filters or the Timeline view (Pro/Business plan) to monitor progress.

8. Automations (Optional)

Create automations such as: 'When task moved to Done → mark completed' or 'If overdue → send reminder email' (Pro/Business feature).

9. Mobile Use

Install the MeisterTask app (iOS/Android). Log in to sync all projects – ideal for learners in dual training or fieldwork.

10. Reflection & Evaluation

At the end of the project, students can reflect on their progress. Trainers can export or screenshot boards for documentation or assessment purposes.

Example Board: Customer Service Simulation

Column	Purpose
To Do	Trainer assigns upcoming tasks to learners.
In Progress	Tasks currently being worked on.
Review	Trainer checks or provides feedback.
Done	Completed and approved tasks.

This example helps learners organize project-based activities, communicate effectively, and develop teamwork and accountability.