

MeisterTask Setup Guide for Vocational Education and Training

Introduction 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**”
- Register using your email or Microsoft/Google account
- Choose the **Free plan** to start

2. Create a New Project

- Click “**New Project**”
- Name the project (e.g., *Retail Training 2025*)
- Choose a color theme
- You’ll see a **Kanban-style board** with default sections: Open, In Progress, Done

3. Customize Columns

- Rename columns to fit your workflow: *To Do, In Progress, Review, Done*
- Right-click a column title to rename or add new columns

4. Add Tasks

- Click “**+ Add Task**”
- Add a **title, description, checklist, attachments, and due date**
- Assign the task to learners or groups

5. Invite Team Members

- Click **Project Members** ()
- Invite learners or colleagues via email
- Assign roles: **Member** (edit) or **Viewer** (view only)

6. Communication & Feedback

- Use **comments** inside tasks for discussion or feedback
- Attach files, checklists, and notes
- Provides transparent communication without extra emails

7. Track Progress

- Dashboard shows tasks: **Open, In Progress, Done**
- Use filters or Timeline (Pro/Business plan) to monitor progress

8. Automations (Optional)

- Automate repetitive tasks (Pro/Business plan):
 - “When task moved to Done → mark completed”
 - “If overdue → send reminder email”

9. Mobile Use

- Install the **MeisterTask app** on iOS/Android
- Log in to sync all projects
- Ideal for learners in dual training or fieldwork

10. Reflection & Evaluation

- At the end of projects, learners reflect on their progress
- Trainers can export or screenshot boards for documentation and assessment

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
Purpose: Helps learners organize project-based activities, communicate effectively, and develop teamwork and accountability.	