OKiDO

OKiDO user guide

How to work with OKiDO, step by step.

Edition: **October 2026**

okido.io/en/docs

OKiDO user guide

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Contents

1. Getting started 7

- Sign in or create an account 8
- Reset a forgotten password 10
- Accept an invitation 12
- Find your way around 14
- Create an organization 17
- Switch between organizations 20
- Change the language and theme 22
- Install OKiDO as an app 23
- Get help from support 25

2. Dashboard, Inbox and Search 28

- Customize your dashboard 29
- Work through your inbox 32
- Turn on push notifications 35
- Find anything with Ctrl+K 37
- Save a search 40

3. Projects 42

- Create a project 43
- Control who can see a project 46
- Switch between List, Board, Calendar and Gantt 48
- Filter, sort and group tasks 52
- Set up board columns 55
- Add rules to a column 58
- Import tasks from Asana, Trello, Jira, Monday or ClickUp 60
- Reuse a project as a template 63
- Archive or delete a project 65
- Give new tasks default labels 66

4. Tasks 68
Create a task 69
Break a task into subtasks 71
Comment, mention people and check activity 72
Follow, share or print a task 74
Attach files and record a briefing 76
Add Smart Labels to a task 78
Make a task wait for another 80
Request an approval 82
Make a task repeat 86
Track time on a task 88
Move a task to another project or organization 90
Hand a task to an AI agent 92

5. Approvals and request forms 94
Follow up on an approval you asked for 95
Create a request form 98
Share a request form with people outside your organization 101
Send a request through a form 103
Handle incoming requests 105

6. Planning: milestones, sprints, reports 107
Create a milestone 108
Track milestones and spot risk 110
Plan a sprint 112
Follow and close a sprint 115
Run a sprint meeting 118
Run a time report 121
Export a report to CSV 124

7. Teams and Smart Labels 126
Create a team 127
Add people to a team 129
Create a Smart Label 131
Add custom fields to a label 133
Organize labels into categories 135
See all tasks with a label 138

8. Playbook 139
Organize the Playbook with folders and processes 140
Give teams access to a folder 142
Write a document 144
Review and publish a document 146
Compare and restore document versions 148
Record your screen 150

9. SOPs and runs 153
Create an SOP template 154
Add checklists, files and variables to steps 157
Add an approval gate to a step 159
Assign steps to teams and AI agents 161
Start a run 163
Complete the steps of a run 165
Approve a step in a run 168
Track and manage runs 170
Schedule a recurring run 173
Share a run with a customer 174

10. Systems and decision trees 176
Build a system 177
Run a system 180
Build a decision tree 183
Run a decision tree 187
Answer a decision tree for a running system 190

11. AI 193
Chat with AI 194
Create an AI agent 197
See your agents and their org chart 200
Configure an agent 202
Set what an agent may do 205
Set agent budgets and watch AI spending 207
Make an agent start on its own 209
Approve or reject agent actions 211
Review agent activity, artifacts and network logs 213
Put an agent to work on a project 216
Connect an MCP server 219
Import skills for agents 222
Have @copilot build a capability 224
Manage what agents remember 226
Give agents credentials for other apps 229

12. Integrations 231
Connect Claude or ChatGPT 232
Ask your AI assistant to work in OKiDO 234
What your AI assistant can do in OKiDO 236
Create an organization API token 248
Create a personal access token 250
Send events to other apps with webhooks 252
Export your organization's data 255
Sync your tasks to Google Tasks 256

13. Organization administration 258
Edit your organization's profile 259
Invite people to your organization 261
Change a member's role or Advanced AI access 263
Change your plan and billing 265
Buy extra storage or AI tokens 269
Choose AI models 271
Set the sprint cadence 272
Import data into your organization 274
Review the audit log 276

14. Your account 278
Update your profile and working hours 279
Choose how you get notified 281
Change your password and sign out other devices 282
Refer someone to OKiDO 284

Appendix 286
Plans and what each includes 287
Glossary 289
Keyboard shortcuts 291
Frequently asked questions 295

CHAPTER 1

Getting started

Sign in or create an account

Reset a forgotten password

Accept an invitation

Find your way around

Create an organization

Switch between organizations

Change the language and theme

Install OKiDO as an app

Get help from support

Read this chapter online

okido.io/en/docs/getting-started

Scan the code or open the link to read this chapter online, where it is always up to date.

Sign in or create an account

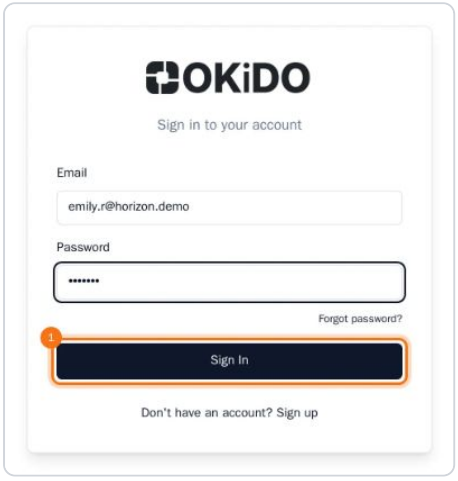
Sign in to OKiDO with your email and password, or create an account with an organization of your own.

Available on: All plans | Who can do this: Everyone in the organization

You sign in to OKiDO with your email address and password. New to OKiDO? Creating an account takes a minute, and it comes with an organization of your own on the Free plan.

Sign in

1. Go to app.okido.io.
2. Enter your **Email** and **Password**.

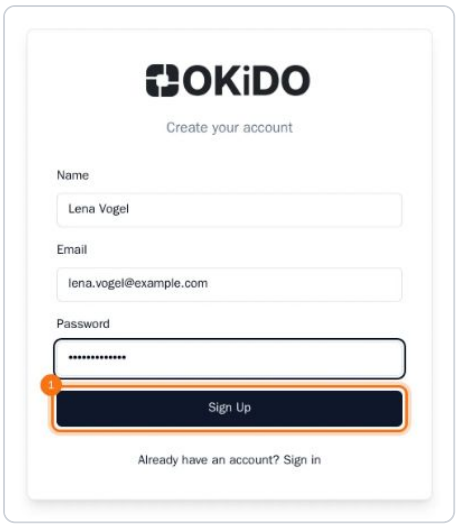


3. Choose **Sign In**.

Your dashboard opens. Forgot your password? Choose **Forgot password?** under the password field (see Reset a forgotten password).

Create an account

1. On the sign-in page, choose **Don't have an account? Sign up**.
2. Enter your **Name**, your **Email** and a **Password** of at least 8 characters.



3. Choose **Sign Up**.

OKiDO creates your account and an organization named after you, on the Free plan, and opens its dashboard. You are its owner, so you can invite your colleagues and set up projects right away.

> **Tip:** Did a colleague invite you? Open the link in your invitation email instead. Your new account then joins their organization straight away (see Accept an invitation).

Reset a forgotten password

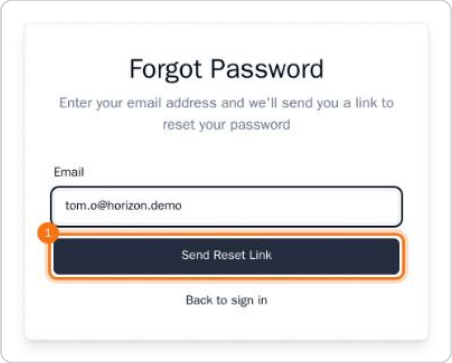
Get a reset link by email and choose a new password when you cannot sign in.

Available on: All plans | Who can do this: Everyone in the organization

Forgot your password? Ask for a reset link on the sign-in page, then choose a new password from the email. You need access to the mailbox of your OKiDO account.

Request a reset link

1. On the sign-in page, choose **Forgot password?**.
2. Enter your **Email**.

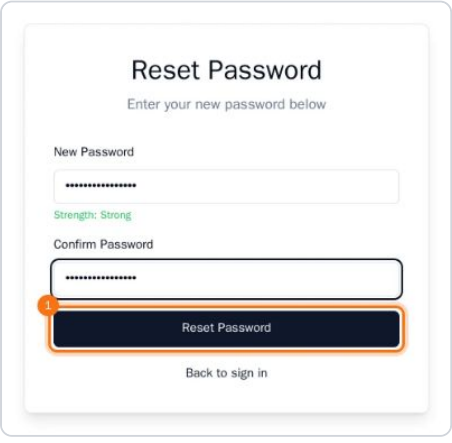


3. Choose **Send Reset Link**.

OKiDO confirms that a link is on its way. The email arrives within a few minutes; check your spam folder if it does not. The link works for one hour, and only the newest link works: if you asked more than once, use the last email.

Choose a new password

1. Open the link in the email.
2. Enter your new password under **New Password**, then again under **Confirm Password**. Use at least 8 characters; OKiDO shows how strong the password is while you type.



3. Choose **Reset Password**.

OKiDO takes you back to the sign-in page. Sign in with your new password. For your safety, the reset also signs your account out on every device where it was still signed in.

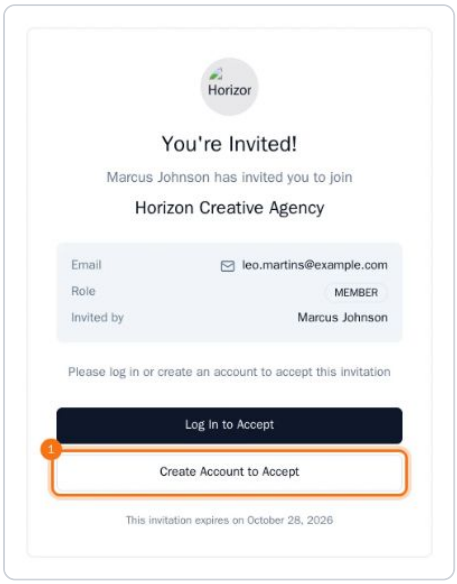
> **Tip:** Does the link show **Invalid Reset Link**? It has expired or was already used. Choose **Request a new reset link** to get a fresh one.

Accept an invitation

Join an organization from the link in your invitation email, with a new account or the one you already have.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

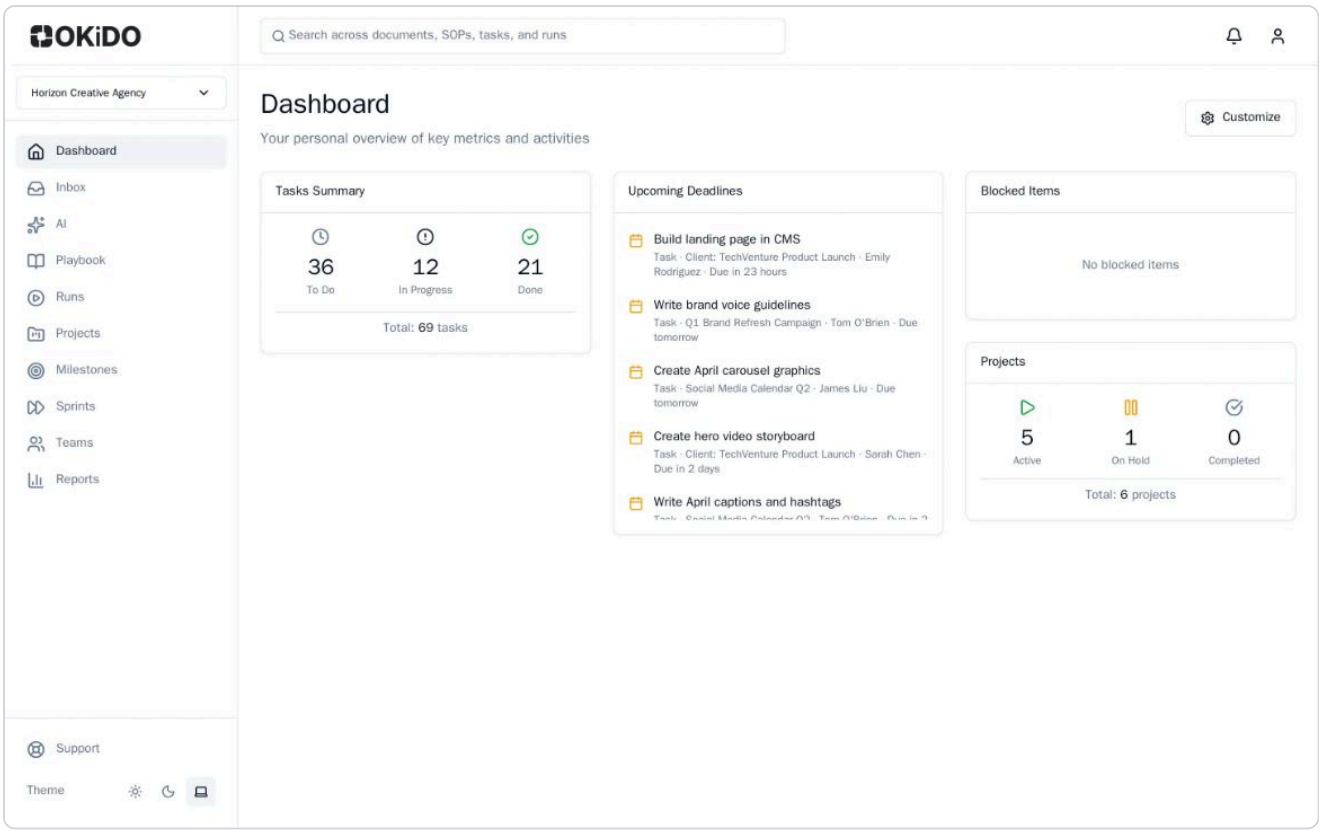
When an owner or admin invites you to their organization, you get an email with an invitation link. The link shows who invited you, to which organization and with which role. It works for 7 days.



Join with a new account

1. Open the link in your invitation email.
2. Choose **Create Account to Accept**.
3. Enter your **Name**, the **Email** address the invitation was sent to, and a **Password** of at least 8 characters.
4. Choose **Sign Up**.

Your account is ready and you are in the organization, with the role from the invitation. Its dashboard opens, and the organization selector at the top of the sidebar shows its name.



Join with the account you already have

1. Open the link in your invitation email.
2. Choose **Log In to Accept** and sign in with the email address the invitation was sent to.
3. Back on the invitation, choose **Accept Invitation**.

The organization is added to your account and opens right away. Your other organizations stay as they are; switch between them with the organization selector (see Switch between organizations).

Not interested? Choose **Decline** in step 3 instead of accepting.

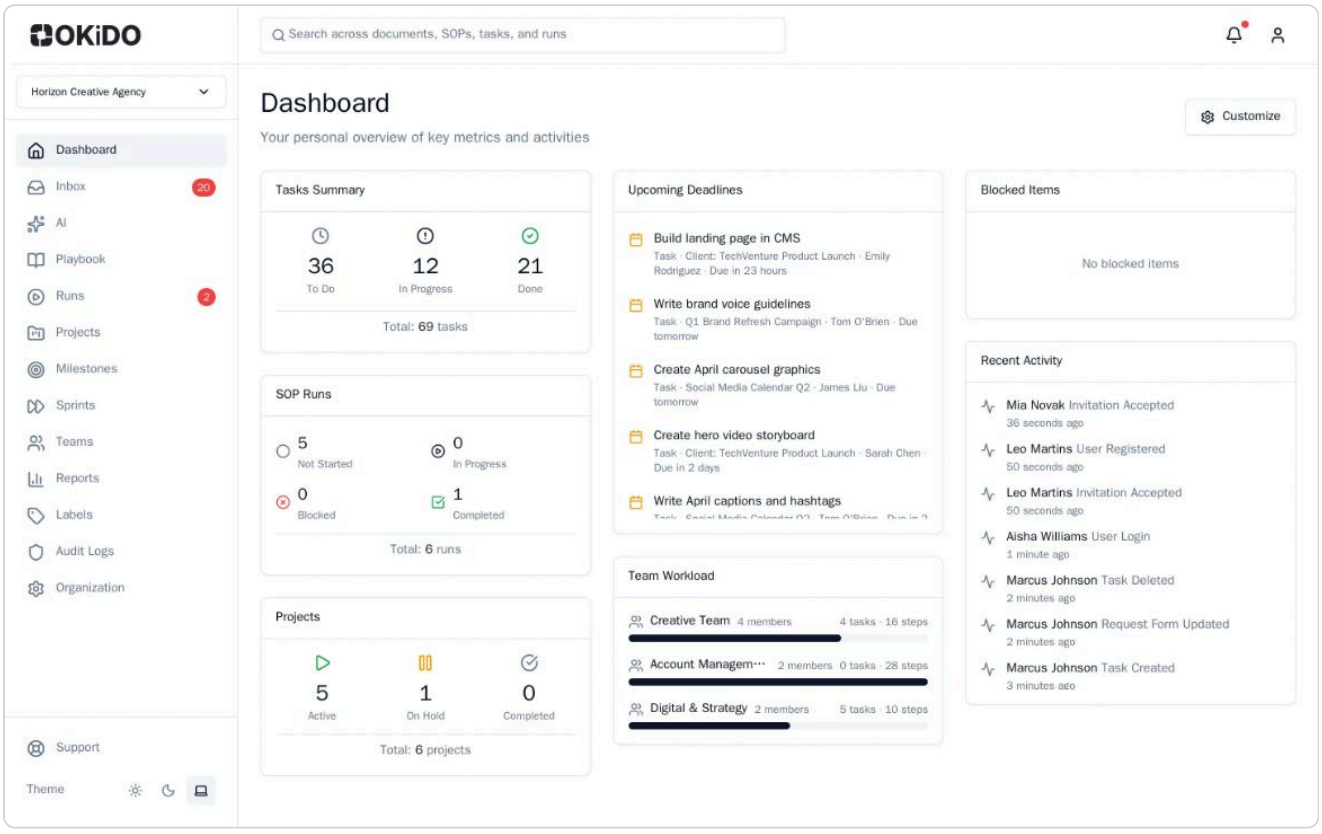
> **Tip:** Use the email address the invitation was sent to: an invitation only works for that address. A new account with another address gets an organization of its own instead of joining.

Find your way around

Learn what each item in the sidebar and the mobile bottom bar opens, and where to find your settings and sign out.

Available on: All plans | Who can do this: Everyone in the organization

Every page in OKiDO has the same frame: the sidebar on the left, a top bar with search, your inbox and your account menu, and the page itself in the middle. A red number next to an item tells you how many things are waiting for you there.



The sidebar

At the top of the sidebar, the organization selector shows which organization you are looking at (see Switch between organizations). Below it:

Item	What it opens
Dashboard	Your own overview, with widgets you choose (see Customize your dashboard)
Inbox	Your notifications: tasks assigned to you, mentions, approvals and more
AI	Chats with your organization's AI agents, and AI actions waiting for your approval

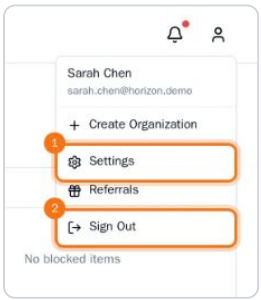
Item	What it opens
Playbook	Your organization's knowledge base: processes, SOPs and documents
Runs	SOP checklists and systems being carried out, with the steps waiting for you
Projects	Your projects and their tasks
Milestones	Every milestone across your projects, with the progress of its tasks
Sprints	Sprints: the work your team plans for the next weeks
Teams	Teams and their members
Reports	Time-tracking reports
Labels	Smart Labels for tasks (owners and admins)
Audit Logs	Security events and actions in your organization (owners and admins)
Organization	Organization settings: members, plan and integrations (owners and admins)

At the bottom of the sidebar you find **Support**, where you ask the OKiDO team for help, and the **Theme** buttons for a light, dark or system theme.

Your account menu

Your settings and sign-out are in the account menu, the person icon at the top right.

1. Choose **Account menu** (the person icon).



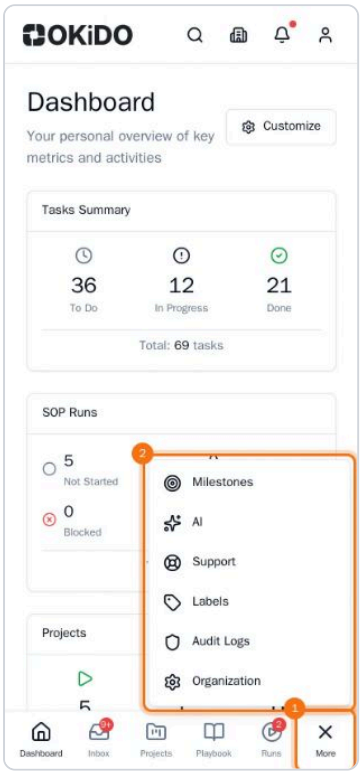
2. Choose what you need:
   - **Create Organization** to set up another organization (see Create an organization).
   - **Settings** for your profile, notifications, password and language.

- **Referrals** to invite others to OKiDO and earn rewards.
- **Sign Out** to sign out on this device.

The bell next to it opens your **Inbox**; a red dot means you have unread notifications. The search box opens quick search (see Find anything with Ctrl+K).

On your phone

On a small screen the sidebar makes way for a bar at the bottom with **Dashboard**, **Inbox**, **Projects**, **Playbook** and **Runs**. Choose **More** for **Milestones**, **AI** and **Support** (plus **Labels**, **Audit Logs** and **Organization** for owners and admins).



At the top, the search, organization, inbox and account buttons work as on a computer.

Create an organization

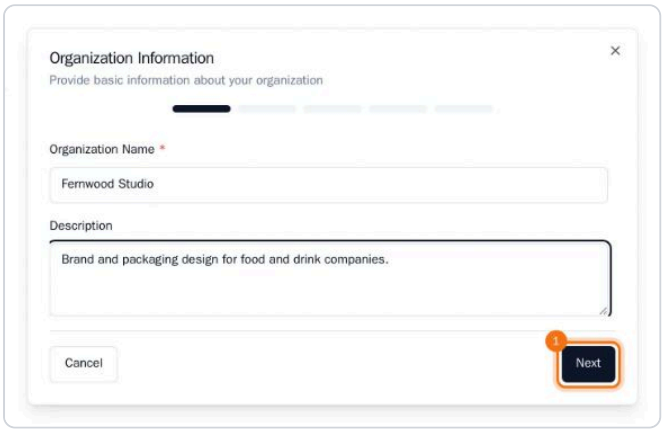
Set up a new organization, pick its plan and finish checkout to start your free trial.

Available on: All plans | Who can do this: Everyone in the organization

An organization is the shared space for a company or team: its projects, Playbook, runs and members. Anyone with an OKiDO account can create one, for example for a second company or a client. You become its owner, and new subscriptions start with a 14-day free trial.

Set up the organization

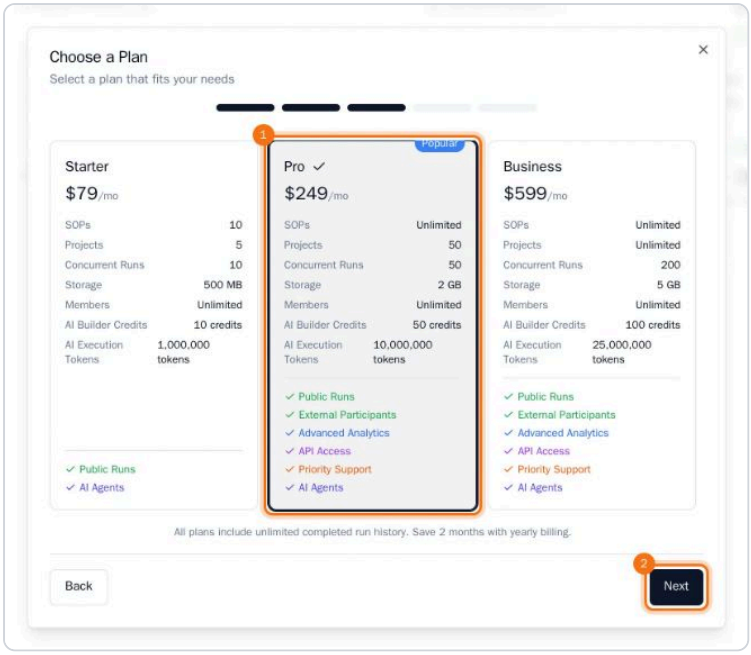
1. Open the account menu (the person icon at the top right) and choose **Create Organization**.
2. Enter the **Organization Name** and, if you like, a **Description**, then choose **Next**.



3. Pick an **Industry Type** if you want recommendations for your line of work, then choose **Next**. You can skip this.

Pick a plan

1. Choose a plan: Starter, Pro or Business. Each card shows the monthly price and what the plan includes, such as the number of SOPs, projects, members and AI credits.

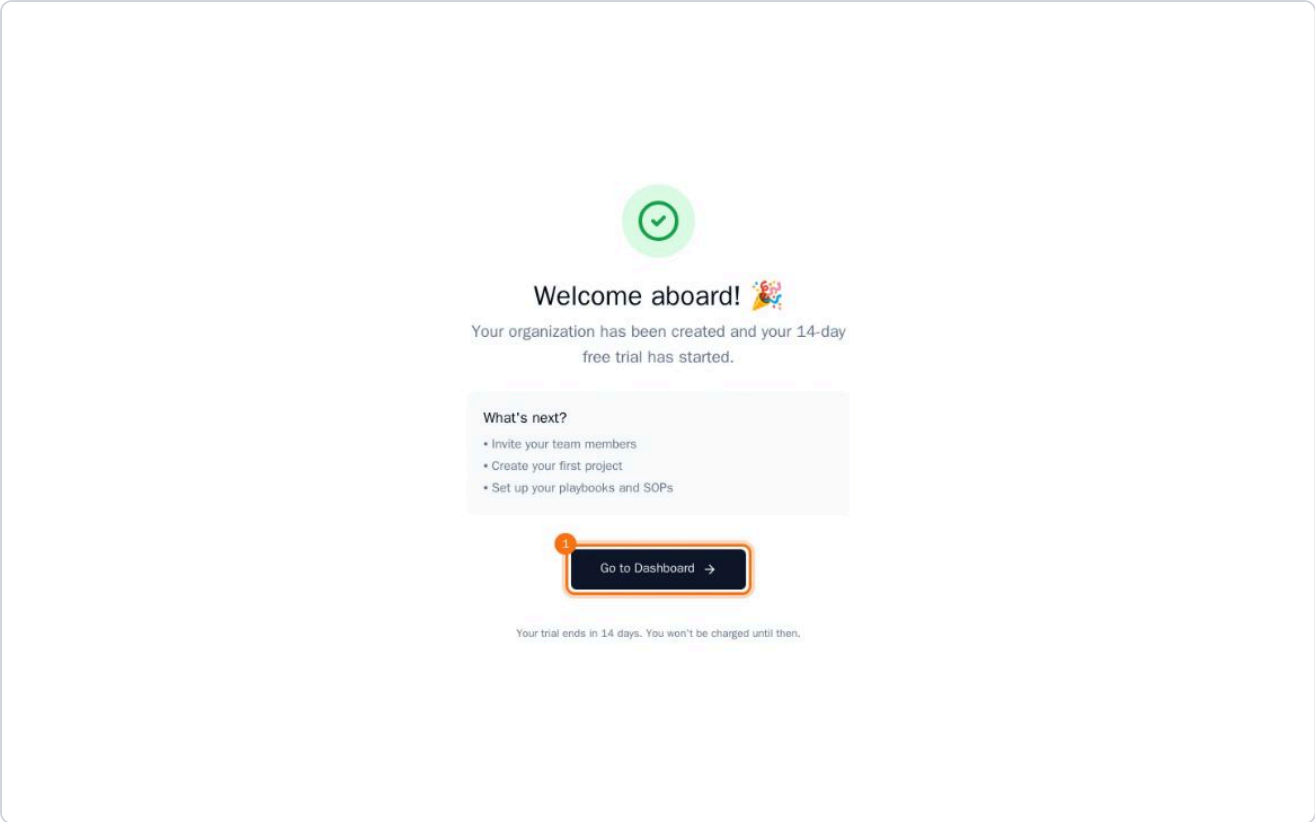


2. Choose **Next**.
3. Choose a **Billing Cycle**: **Monthly** or **Yearly** (two months free), and enter the **Billing Email** for invoices. Then choose **Next**.
4. Check the summary and choose **Create & Continue to Checkout**.

Finish checkout

OKiDO creates the organization and takes you to secure checkout to add a payment method. You are not charged until your 14-day free trial ends.

When checkout is complete, you are back in OKiDO with your trial started. Choose **Go to Dashboard** to start inviting your team and creating projects. The new organization is already selected.



Cancelled checkout, or closed the payment page before it finished? Your organization still exists and uses the Free plan until checkout is complete. On the **Payment Cancelled** page, choose **Try Again** to finish it on the **Plans** tab of the organization's settings, now or later.

Switch between organizations

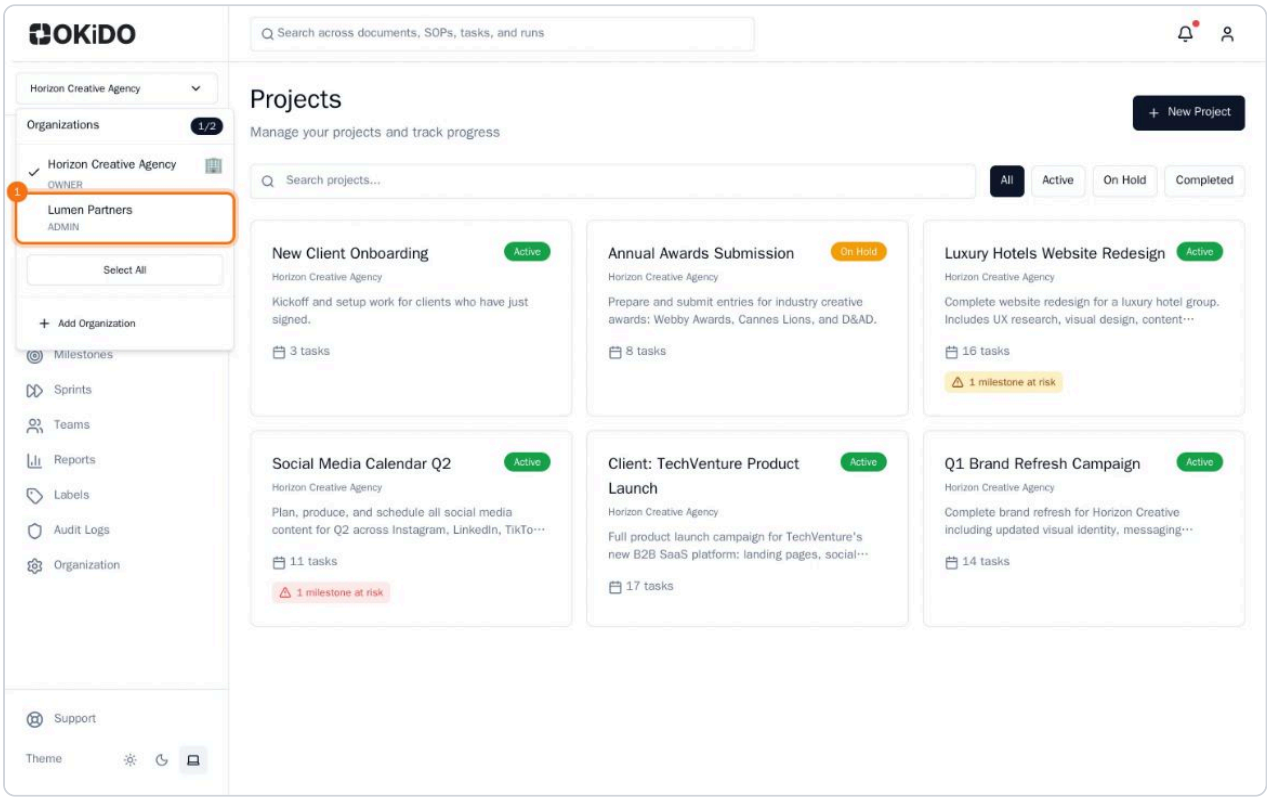
Choose which of your organizations you see, or show several at once, with the organization selector.

Available on: All plans | Who can do this: Everyone in the organization

When you belong to more than one organization, for example your own company and a client who invited you, the organization selector at the top of the sidebar decides whose work you see. You can look at one organization at a time, or at several together.

Switch to another organization

1. Choose the organization selector at the top of the sidebar. It lists every organization you belong to, with your role in each.

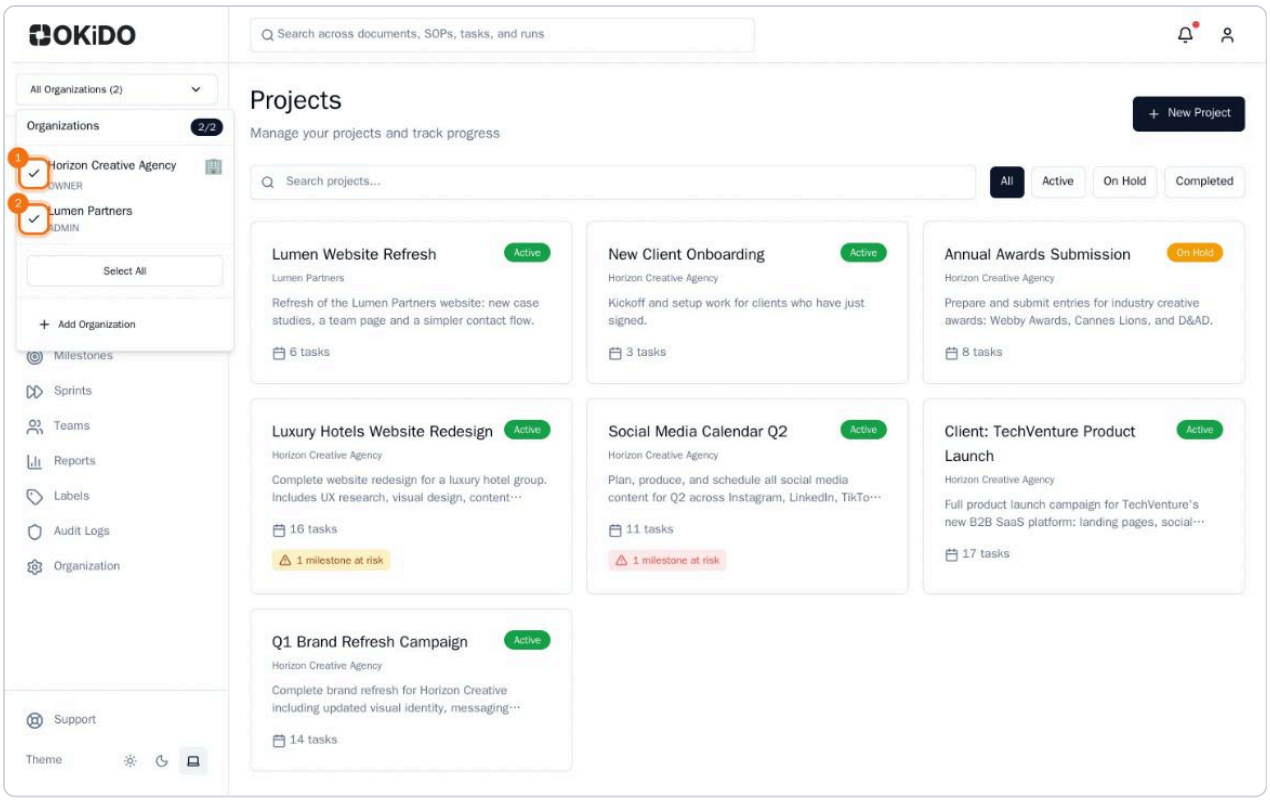


2. Choose the name of the organization you want to see.

The page now shows that organization only, and the selector shows its name. OKiDO remembers your choice on this device.

Show several organizations at once

1. Open the organization selector.
2. Choose the check mark in front of another organization (**Add to selection**). The menu stays open, so you can add more.



3. Or choose **Select All** to see all your organizations at once.

Your projects, inbox, dashboard and search now cover every selected organization, and the selector shows how many you selected. Choose a check mark again to remove an organization (**Remove from selection**); at least one stays selected.

> **Tip:** Need an organization of your own? Choose **Add Organization** at the bottom of the selector (see Create an organization).

Change the language and theme

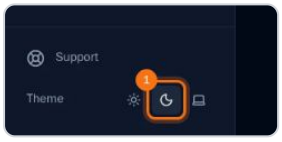
Switch OKiDO to another language, and choose a light, dark or system theme.

Available on: All plans | Who can do this: Everyone in the organization

OKiDO speaks English, Spanish, French, German, Dutch and Portuguese, and comes in a light and a dark theme. Your language is saved with your account; the theme is saved in each browser you use.

Choose a theme

1. At the bottom of the sidebar, next to **Theme**, choose a button:
   - **Light mode** (the sun) for light colors,
   - **Dark mode** (the moon) for dark colors,
   - **System mode** (the screen) to follow the setting of your computer or phone.



OKiDO changes color right away and keeps your choice in this browser. With the system theme, it switches along when your device switches between light and dark.

Change the language

1. Open the account menu (the person icon at the top right) and choose **Settings**.
2. Choose the **Preferences** tab.
3. Under **Language**, choose your language.



4. Choose **Save Preferences**.

OKiDO switches to the new language at once, and dates and times follow it. Your other devices switch the next time you open OKiDO there.

> **Tip:** Before you sign in, the sign-in page and invitation pages use your browser's language.

Install OKiDO as an app

Install OKiDO on your computer or phone so it opens in its own window, like any other app.

Available on: All plans | Who can do this: Everyone in the organization

OKiDO runs in your browser, and you can also install it as an app. It then gets its own icon on your home screen, dock or taskbar and opens in its own window, without the browser's address bar and tabs. Nothing to download from an app store: the browser installs it in a few seconds, and it always runs the latest version.

On a computer (Chrome or Edge)

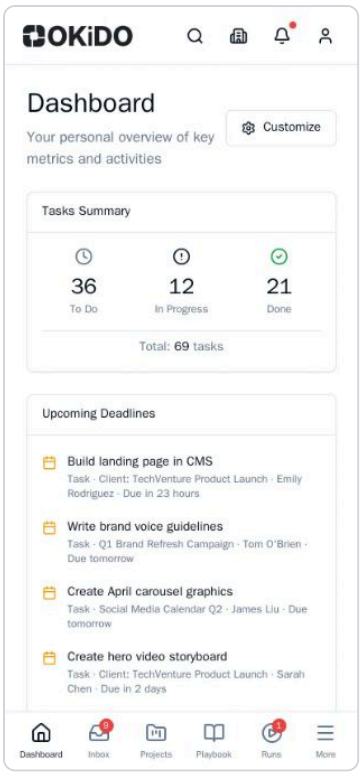
1. Open OKiDO in Chrome or Microsoft Edge and sign in.
2. Choose the install icon at the right end of the address bar. If you don't see it, open the browser menu and look for the option to install OKiDO as an app.
3. Confirm with **Install**.

OKiDO opens in its own window, and you find it with your other apps, for example in the Start menu or Launchpad. In Safari on a Mac, choose **File**, then **Add to Dock**.

On a phone or tablet

- **iPhone and iPad (Safari):** open OKiDO, choose the Share button, then **Add to Home Screen**, then **Add**.
- **Android (Chrome):** open OKiDO, open the browser menu (the three dots), then choose **Install app** or **Add to Home screen**.

Open OKiDO from its new icon: it fills the whole screen, with the bottom bar for getting around (see Find your way around).



> **Tip:** On Android, press and hold the OKiDO icon; on a computer, right-click it. You can then jump straight to the dashboard, your inbox or your projects.

Get help from support

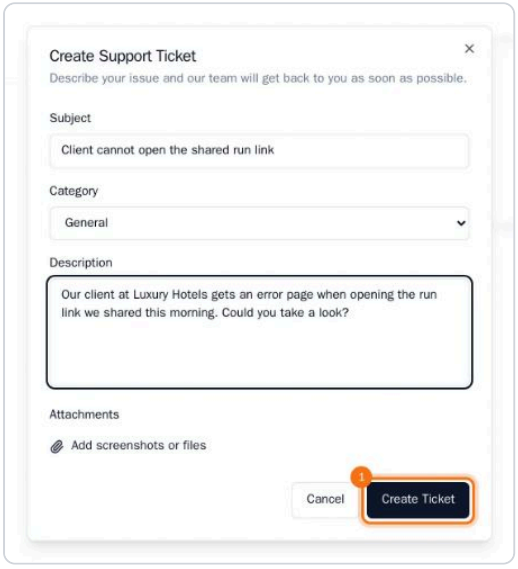
Open a support ticket, follow the conversation and reply to the OKiDO support team.

Available on: All plans | Who can do this: Everyone in the organization

Stuck, found a bug or missing a feature? Open a support ticket in OKiDO. The support team answers in the ticket, and you keep the whole conversation in one place.

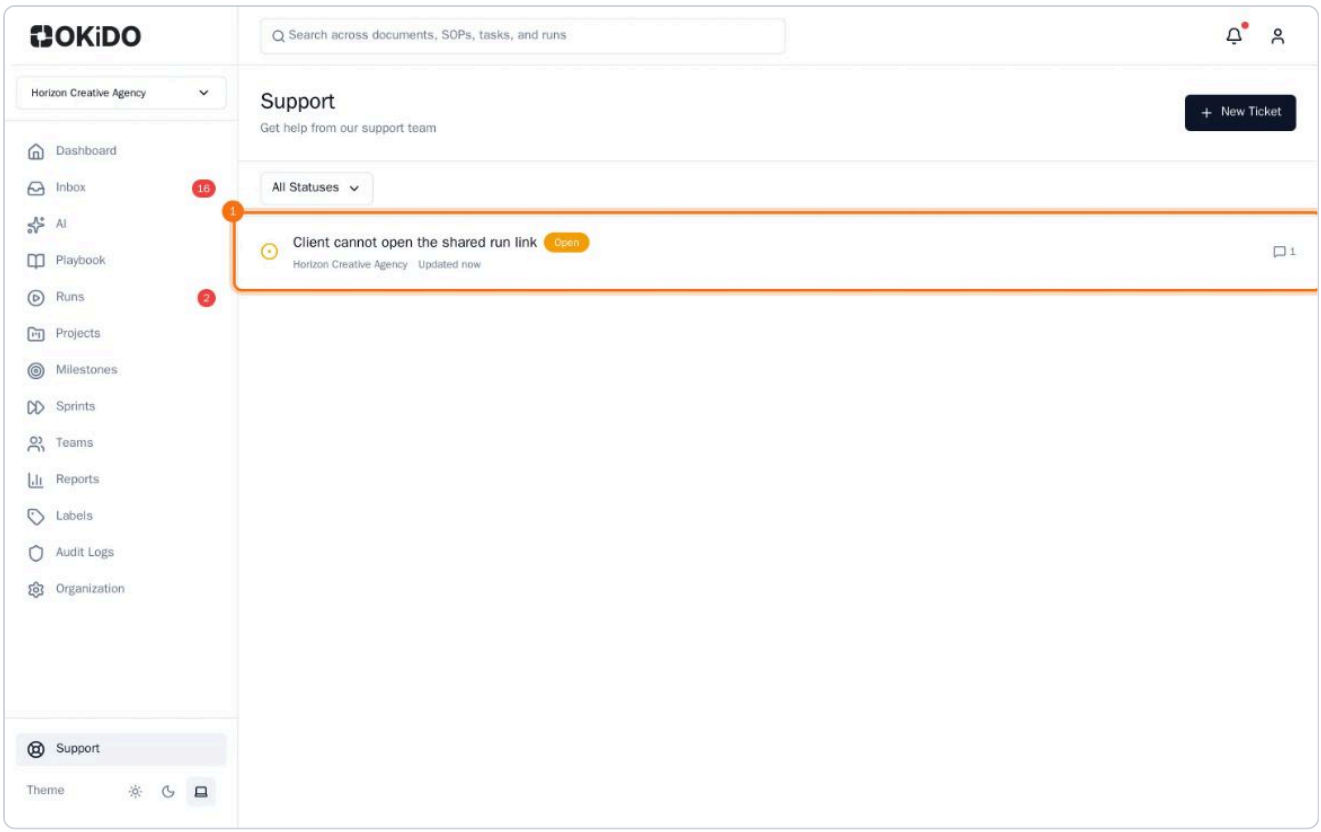
Open a ticket

1. Choose **Support** at the bottom of the sidebar (on a phone: **More**, then **Support**).
2. Choose **New Ticket**.
3. Enter a **Subject**, choose a **Category** if one fits, and describe the issue under **Description**. Choose **Add screenshots or files** to attach screenshots or files.



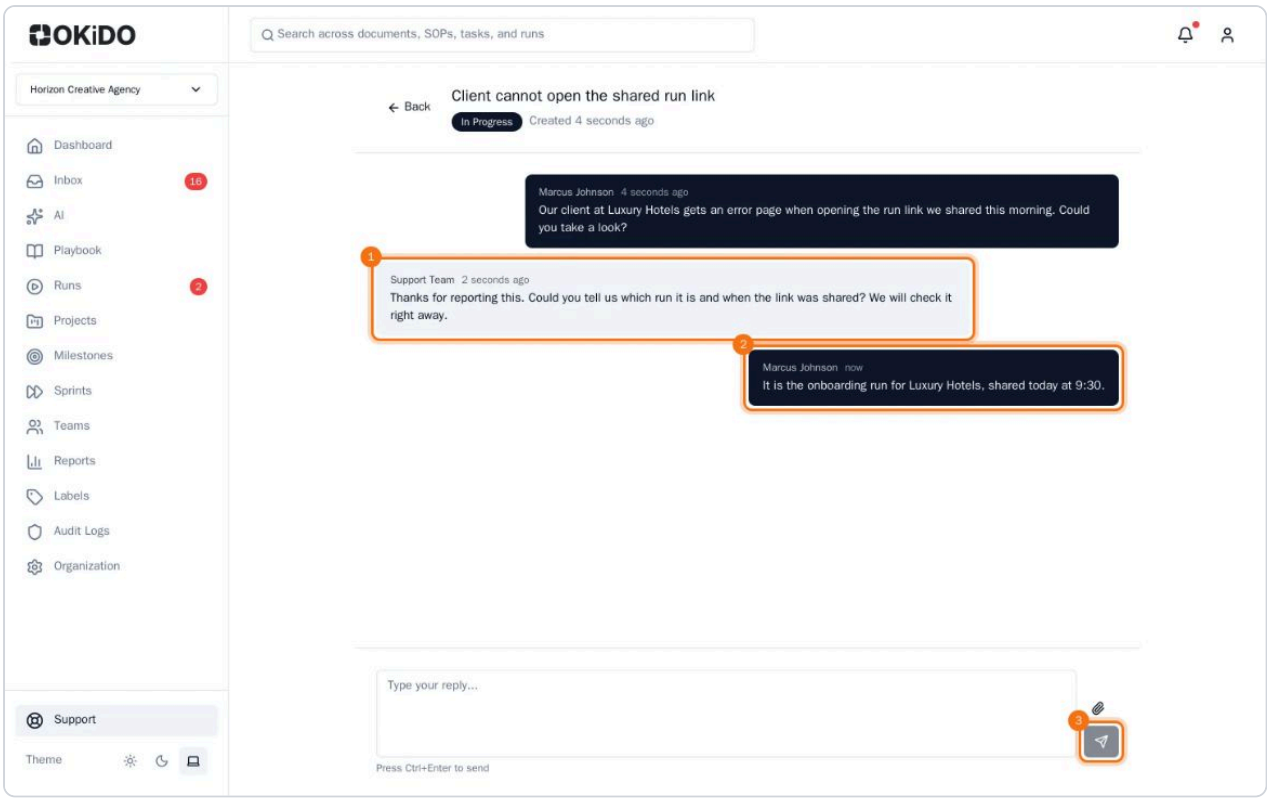
4. Choose **Create Ticket**.

Your ticket appears in the list as **Open**. The list shows the status of each ticket, when it was last updated and how many messages it has.



Follow the conversation and reply

1. Choose the ticket in the list. The support team's answers are on the left, marked **Support Team**; your messages are on the right.
2. Type your reply in the box below the conversation.
3. Choose the send button next to the box, or press Ctrl+Enter.



Your reply is added to the conversation. When the support team takes up your ticket, its status changes to **In Progress**, and later to **Resolved** or **Closed**. Use **All Statuses** above the list to show only tickets with one status.

> **Tip:** A closed ticket takes no more replies. Have a new question about the same topic? Open a new ticket.

CHAPTER 2

Dashboard, Inbox and Search

Customize your dashboard

Work through your inbox

Turn on push notifications

Find anything with Ctrl+K

Save a search

Read this chapter online

okido.io/en/docs/dashboard-inbox-search

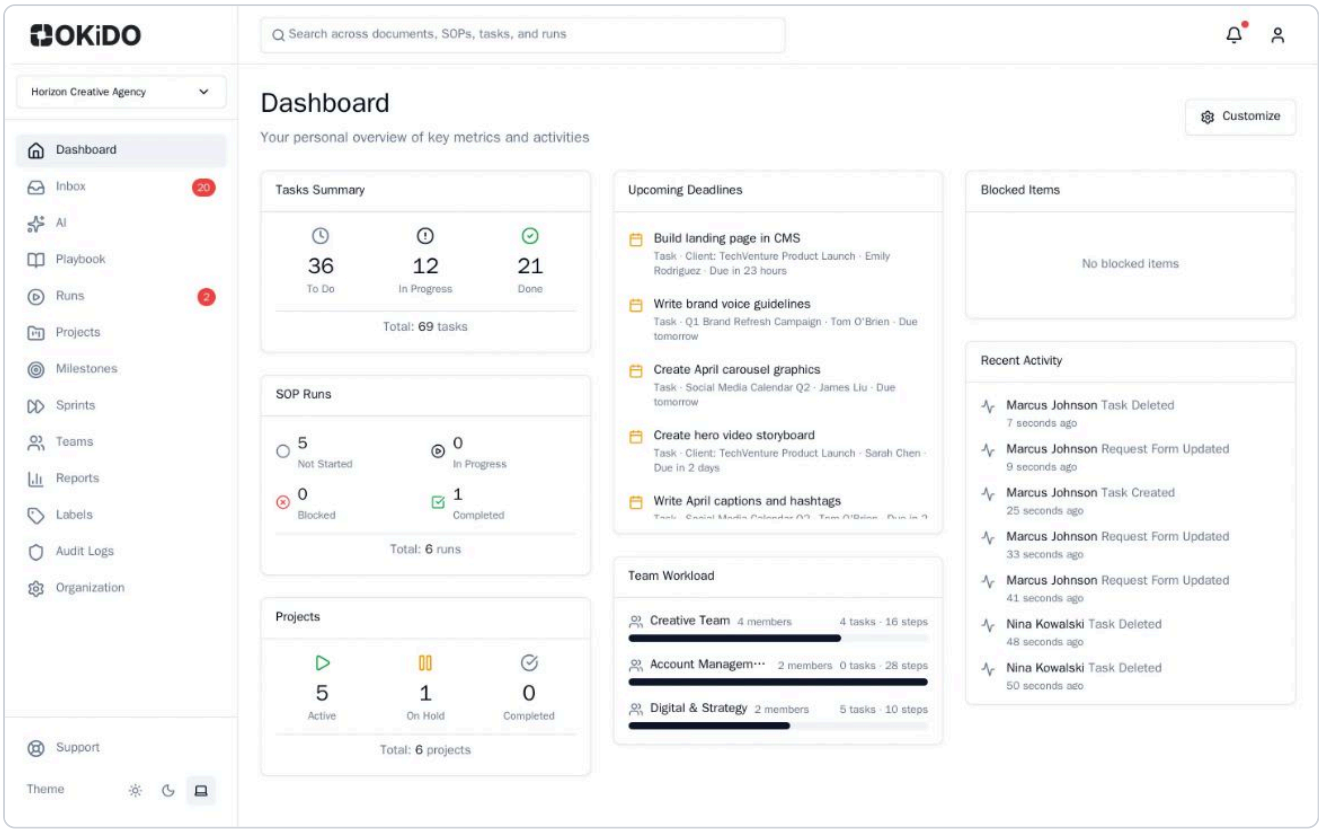
Scan the code or open the link to read this chapter online, where it is always up to date.

Customize your dashboard

Add, remove and rearrange the widgets on your dashboard, such as Tasks Summary, Upcoming Deadlines and My Time.

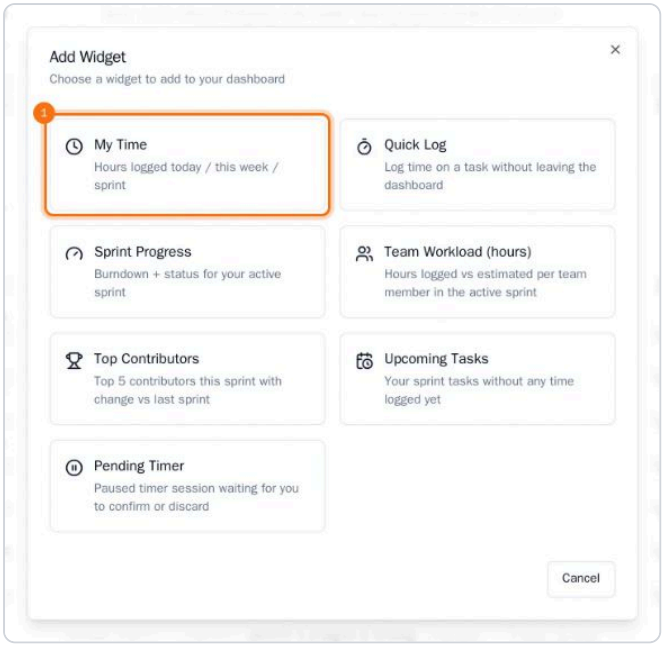
Available on: All plans | Who can do this: Everyone in the organization

Your dashboard is the first page you see after signing in. It is yours alone: choose the widgets that help you most, in the order you like, and nobody else's dashboard changes.



Add a widget

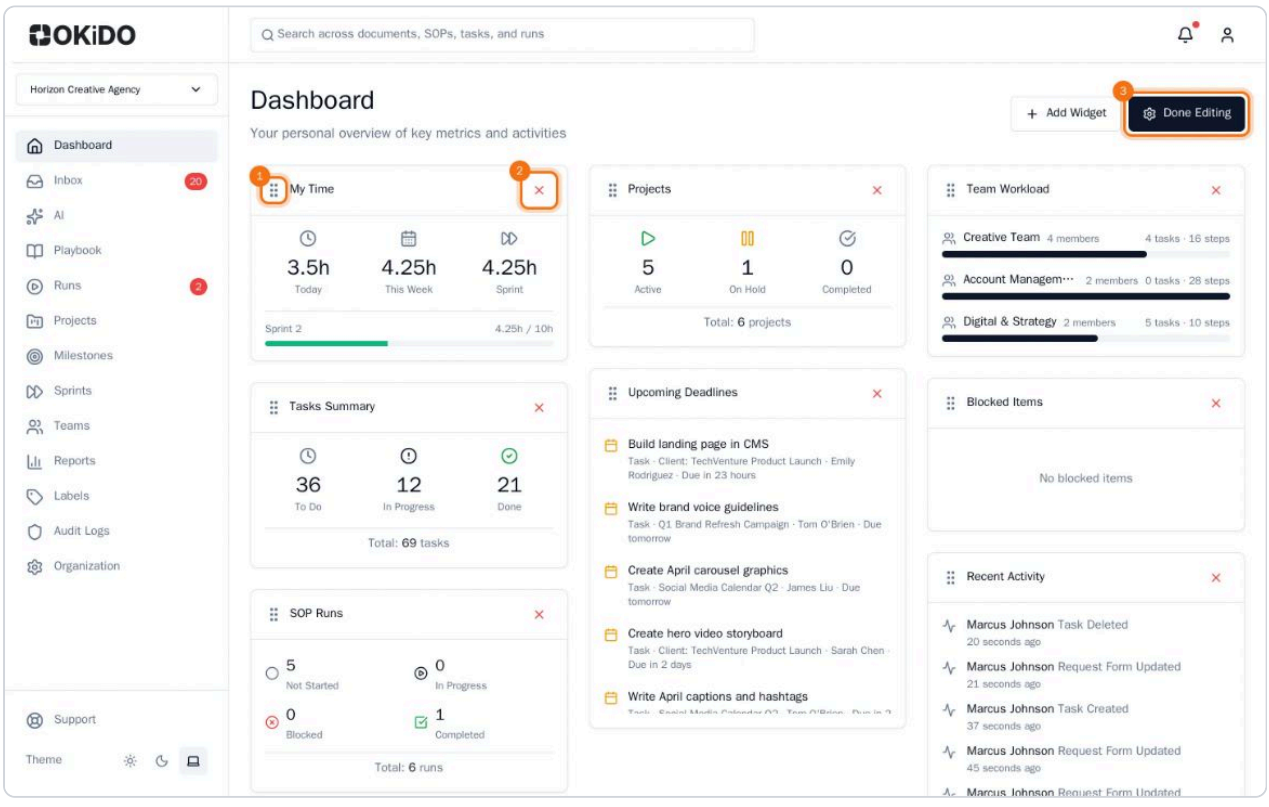
1. On your **Dashboard**, choose **Customize**.
2. Choose **Add Widget**.
3. Choose the widget you want, for example **My Time** for the hours you logged today, this week and in the sprint.



The widget is added at the end of your dashboard. The list only offers widgets that are not on your dashboard yet; **Recent Activity** is for owners and admins only.

Rearrange and remove widgets

1. Choose **Customize**. Every widget now shows a handle on the left of its title and a cross on the right.
2. Drag a widget by its handle and drop it on the place where you want it.
3. Choose the cross on a widget to remove it.



4. Choose **Done Editing**.

OKiDO saves every change right away. Removed a widget by mistake? Add it again with **Add Widget**.

> **Tip:** With several organizations selected, each widget shows which organization it belongs to, and **Add Widget** first asks for the organization.

Work through your inbox

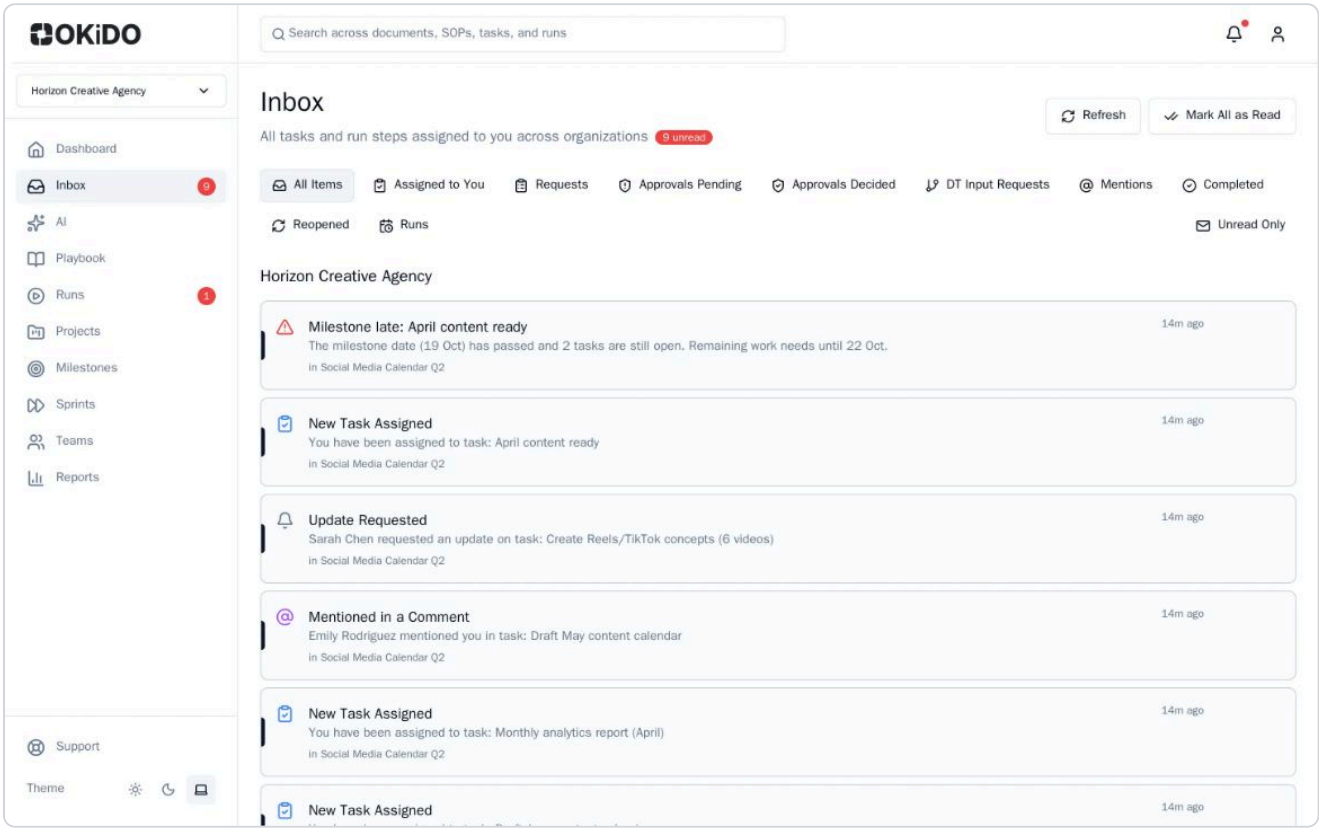
Filter your notifications by type, open the item behind each one and mark them as read.

Available on: All plans | Who can do this: Everyone in the organization

Your inbox collects everything that needs your attention: tasks assigned to you, mentions, approvals to give, submitted requests, run steps and tasks you follow. Work through it from top to bottom, and it tells you when you are all caught up.

Open your inbox

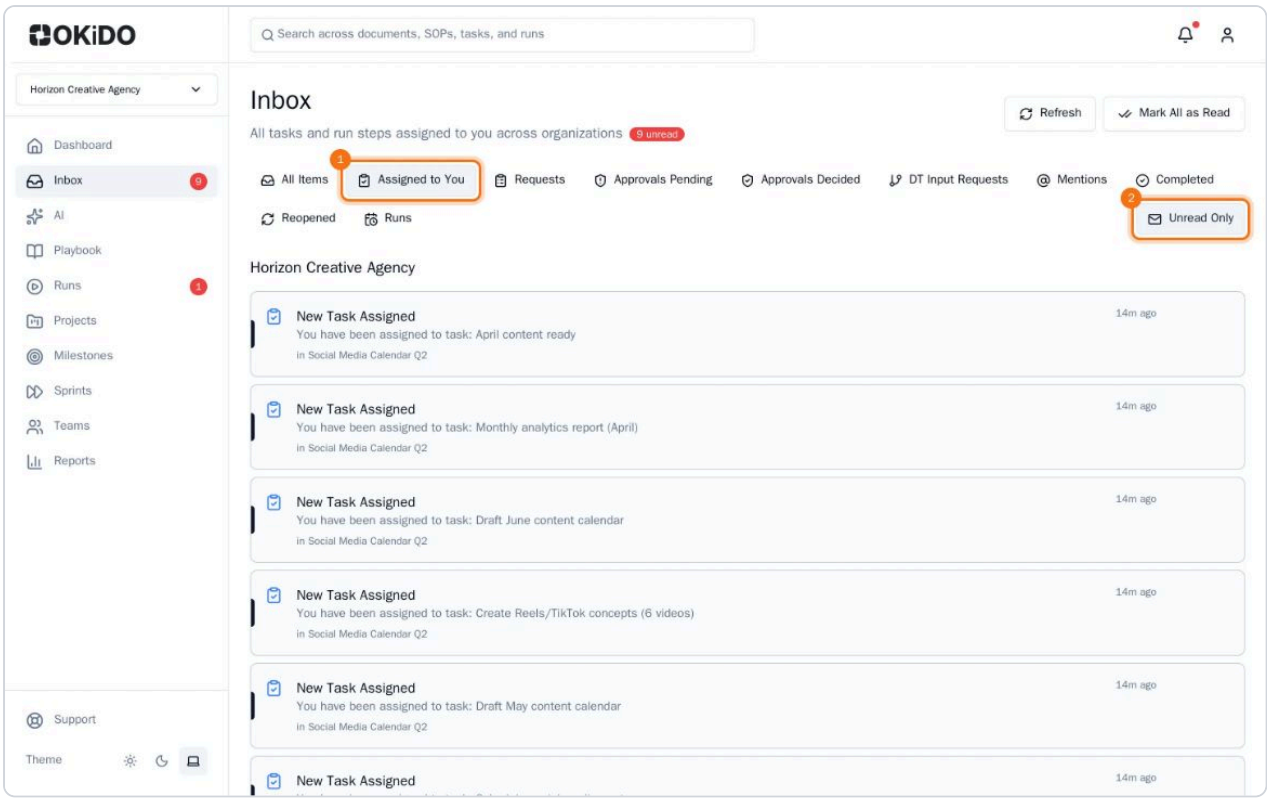
Choose **Inbox** in the sidebar, or the bell at the top right. The number next to **Inbox** shows how many notifications you have not read yet.



Notifications are grouped by organization, newest first. Unread ones have a colored background and a bar on the left. The inbox refreshes by itself; choose **Refresh** to check right away.

Filter by type

1. Choose a filter above the list, for example **Assigned to You**, **Mentions**, **Approvals Pending** or **Requests**.
2. Choose **Unread Only** to hide what you have already read.



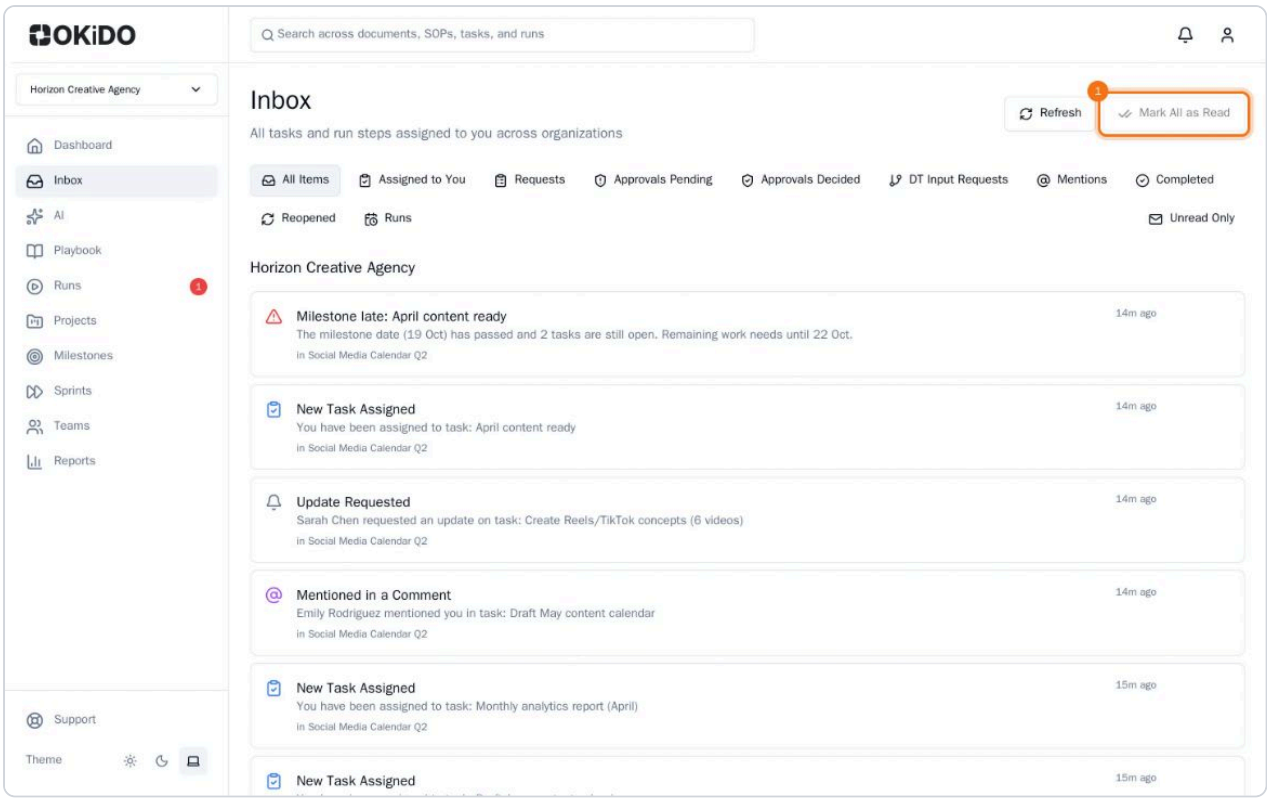
Choose **All Items** to see everything again. On a phone, the filters are under **Filters**.

Open the item behind a notification

Choose a notification. OKiDO opens the task, run or request it is about, and marks the notification as read.

Mark notifications as read

- **One at a time:** point at a notification and choose **Mark as read** (the open envelope) on the right. **Mark as unread** turns it back, and the trash can deletes it.
- **All at once:** choose **Mark All as Read** at the top right.



The count next to **Inbox** in the sidebar catches up within half a minute. Read notifications stay in your inbox, so you can always find them again.

Turn on push notifications

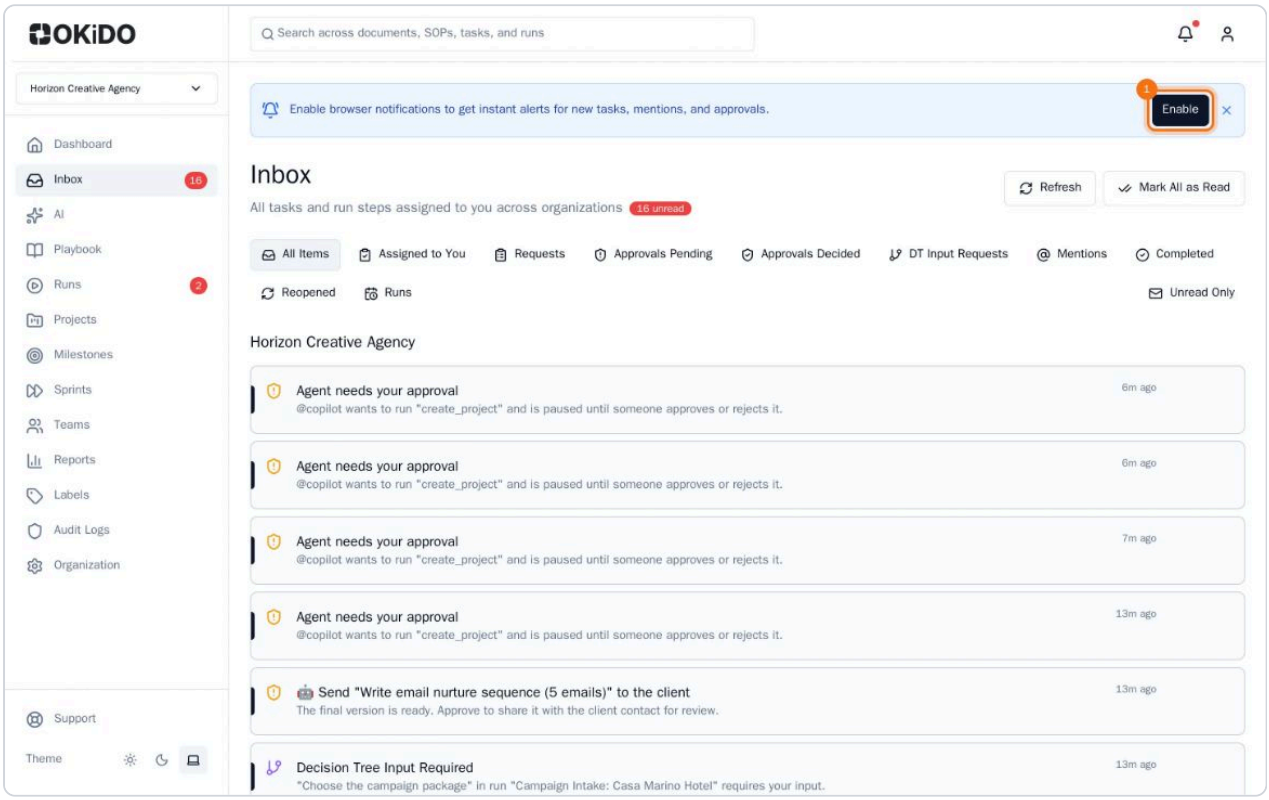
Allow browser push notifications so new tasks, mentions and approvals reach you even when OKiDO is closed.

Available on: All plans | Who can do this: Everyone in the organization

With push notifications on, your computer or phone shows an alert the moment a task is assigned to you, someone mentions you or an approval waits for you, even when OKiDO is not open. Choose an alert to go straight to the item.

Allow notifications in your browser

1. Open your **Inbox**. When your browser has not asked about notifications for OKiDO yet, a blue bar at the top invites you to turn them on.



2. Choose **Enable**.
3. Your browser asks whether OKiDO may show notifications. Choose **Allow**.

The bar disappears, and from now on new notifications pop up on this device. Do this once on every computer and phone where you want alerts.

> **Tip:** On an iPhone or iPad, install OKiDO on your home screen first and open it from there: Safari only shows push notifications for installed apps (see Install OKiDO as an app).

Check that push is on in your settings

Push notifications also have to be on in your OKiDO settings. They are, unless you turned them off.

1. Open the account menu (the person icon at the top right) and choose **Settings**.
2. Choose the **Preferences** tab.
3. Under **Notification Channels**, make sure **Push notifications** is checked.



4. If you changed it, choose **Save Preferences**.

> **Tip:** Chose **Block** by accident? The bar does not come back. Allow notifications for OKiDO in your browser's site settings (in most browsers, the icon to the left of the web address), then reload the page.

Find anything with Ctrl+K

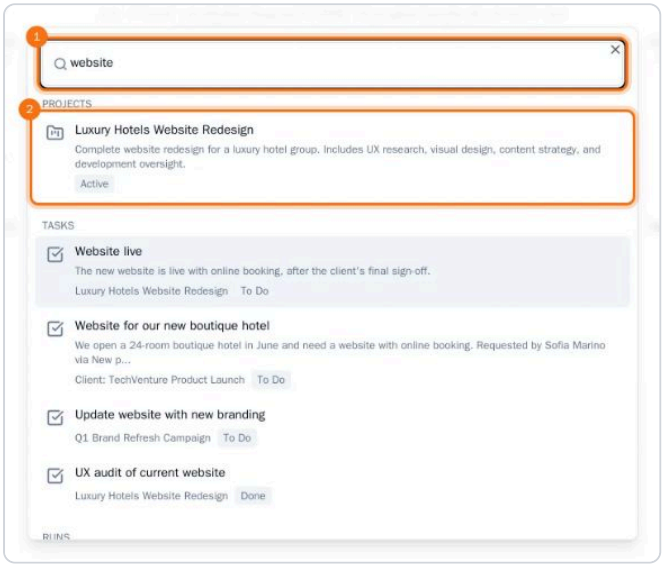
Open quick search with Ctrl+K (Cmd+K on a Mac), jump to a result, or open the full search page and narrow it down with filters.

Available on: All plans | Who can do this: Everyone in the organization

Search finds projects, tasks, runs, SOP templates and documents across your organization, from any page. Quick search gets you to something in seconds; the full search page helps when you need to dig deeper.

Jump to a result with quick search

1. Press Ctrl+K (Cmd+K on a Mac), or choose the search box at the top of any page.
2. Type at least two letters, for example part of a task or project name.



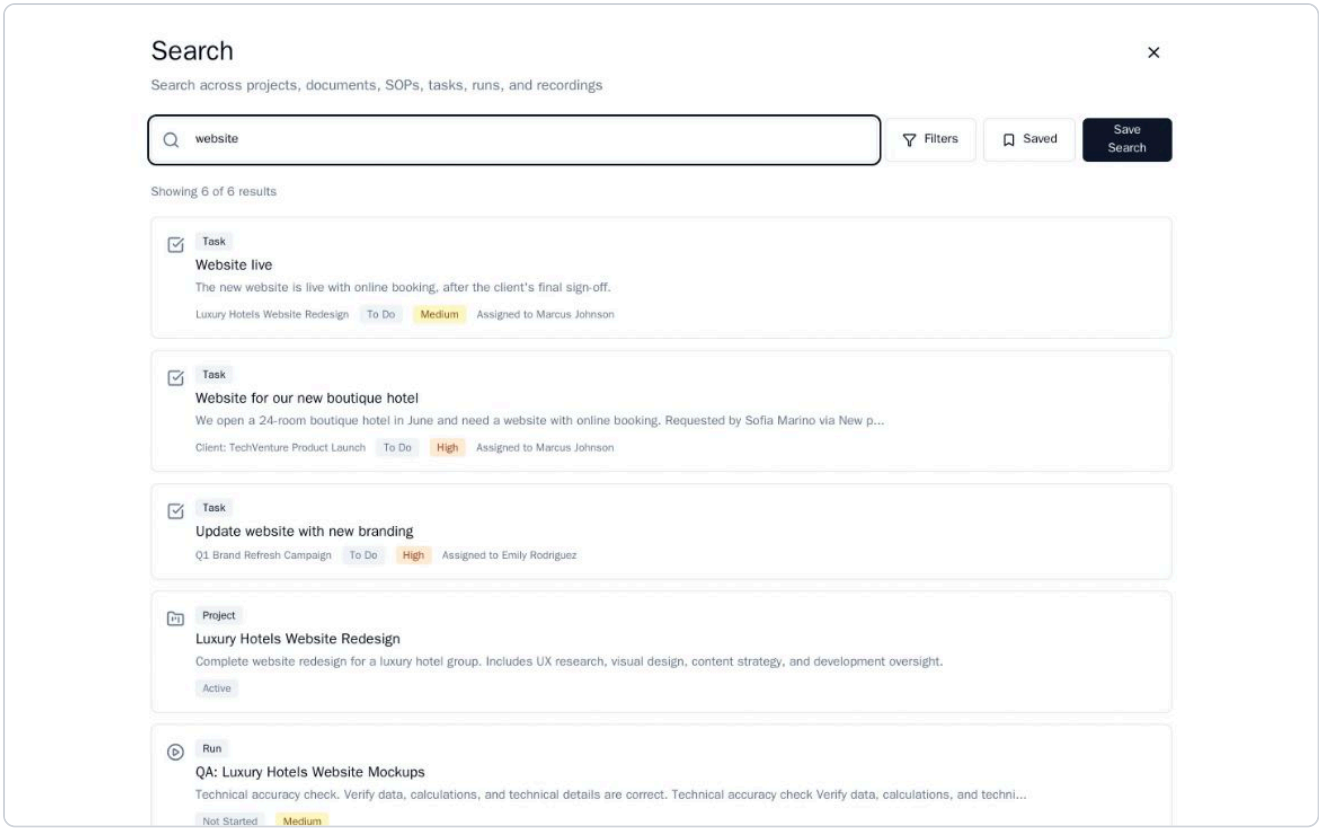
3. Choose a result, or move to it with the arrow keys and press Enter.

The project, task, run or document opens. Results are grouped by type, with the project and status shown under each one. Press Esc to close quick search without opening anything.

Open the full search page

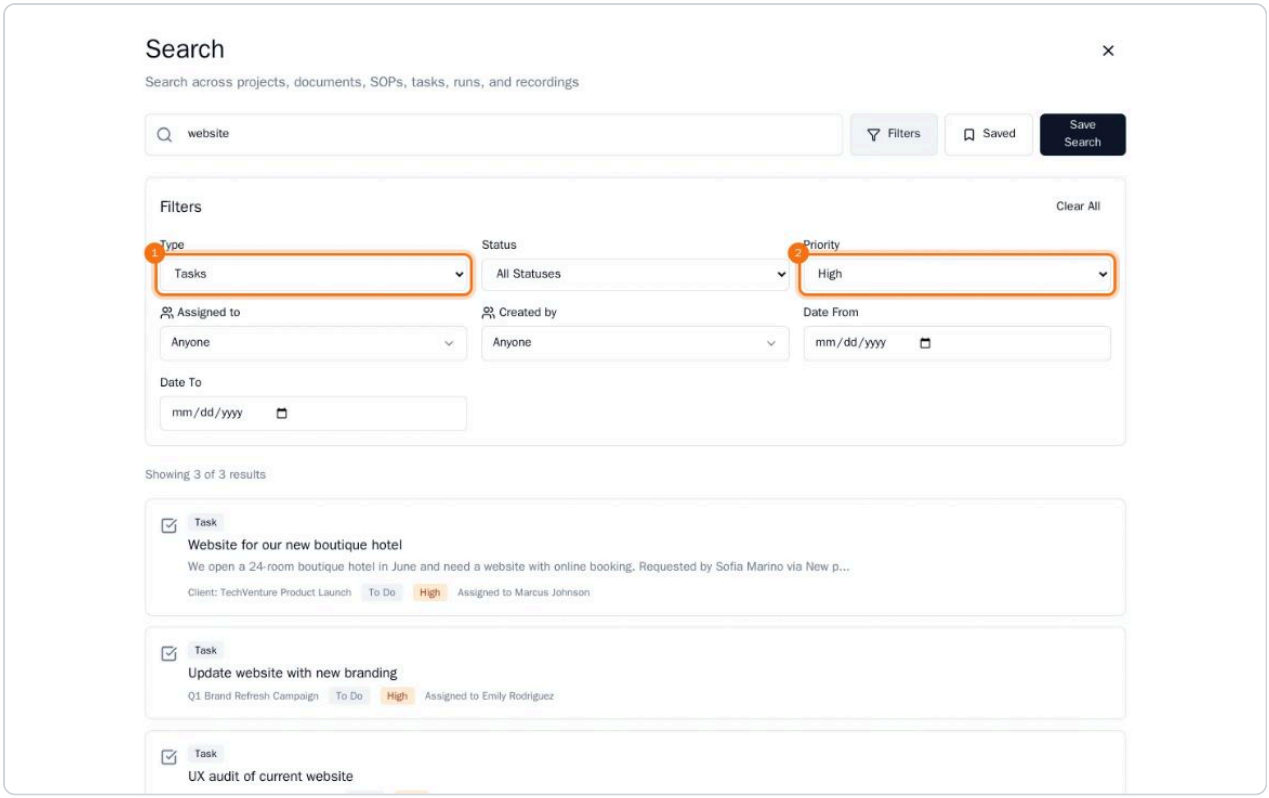
1. In quick search, choose **View all results** below the results.

The **Search** page shows up to 20 results per page, each with its type, a short excerpt and who it is assigned to. Choose a result to open it, or the cross at the top right to go back to where you were.



Narrow it down with filters

1. On the search page, choose **Filters**.
2. Set what you need:
   - **Type**: projects, documents, SOP templates, tasks, runs or Playbook recordings only.
   - **Priority**: tasks of one priority.
   - **Assigned to** and **Created by**: a person or a whole team.
   - **Date From** and **Date To**: only what changed in that period.



The results update as soon as you change a filter. Choose **Clear All** to remove all filters. With several organizations selected, you can also limit the search to one **Organization**.

> **Tip:** Searching for the same thing often? Save it: see Save a search.

Save a search

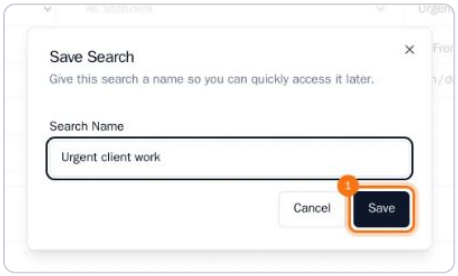
Save a search and its filters under a name, and run it again from Saved Searches.

Available on: All plans | Who can do this: Everyone in the organization

Do you look for the same things every week, such as your team's urgent tasks? Save the search with its filters under a name, and run it again with one click. Your saved searches are yours; nobody else sees them.

Save a search

1. Search for what you need and set the filters on the search page (see Find anything with Ctrl+K).
2. Choose **Save Search** next to the search box.
3. Enter a **Search Name**, for example "Urgent client work".

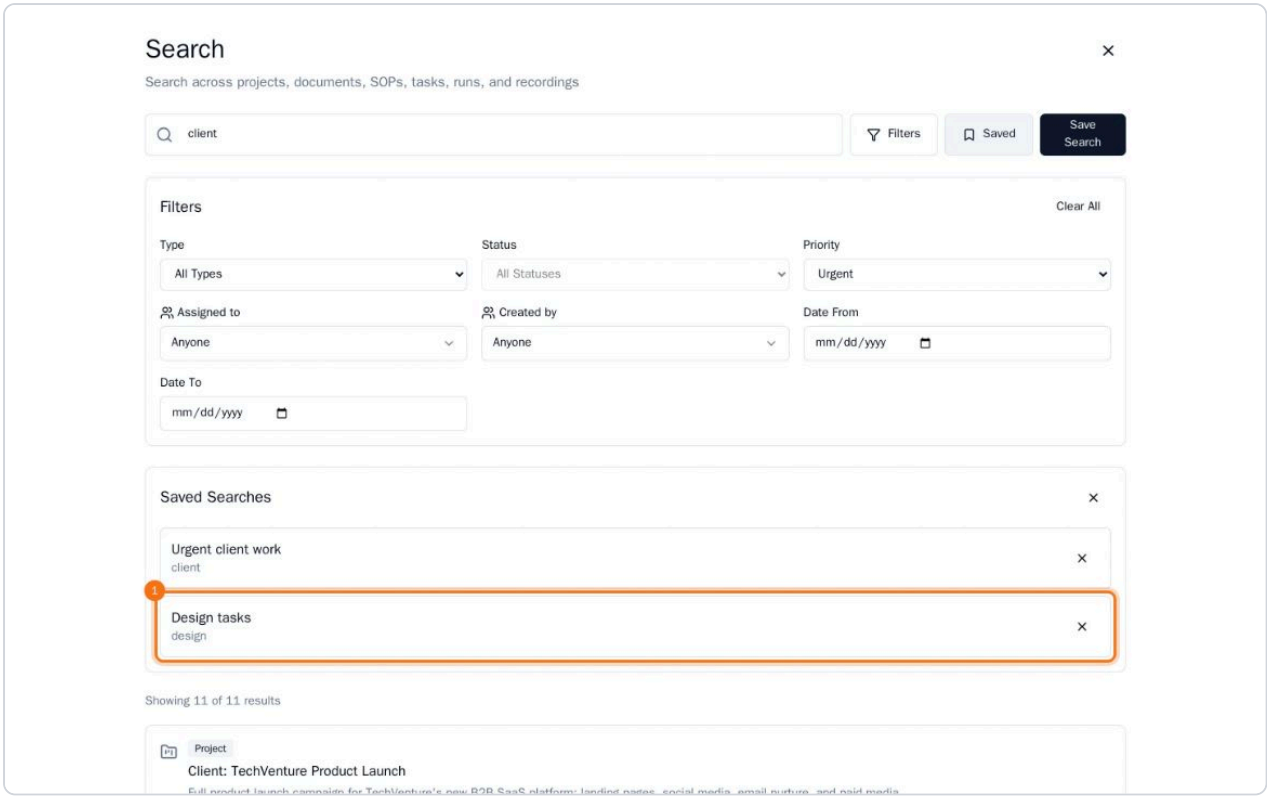


4. Choose **Save**.

OKiDO saves the search words together with all the filters you set.

Run a saved search

1. On the search page, choose **Saved**.
2. Under **Saved Searches**, choose the search you want.



The search words and filters are set again, and the results show what matches today.

Delete a saved search

1. Choose **Saved**, then the cross next to the saved search.
2. Confirm with **Delete**.

CHAPTER 3

Projects

Create a project

Control who can see a project

Switch between List, Board, Calendar and Gantt

Filter, sort and group tasks

Set up board columns

Add rules to a column

Import tasks from Asana, Trello, Jira, Monday or ClickUp

Reuse a project as a template

Archive or delete a project

Give new tasks default labels

Read this chapter online

okido.io/en/docs/projects

Scan the code or open the link to read this chapter online, where it is always up to date.

Create a project

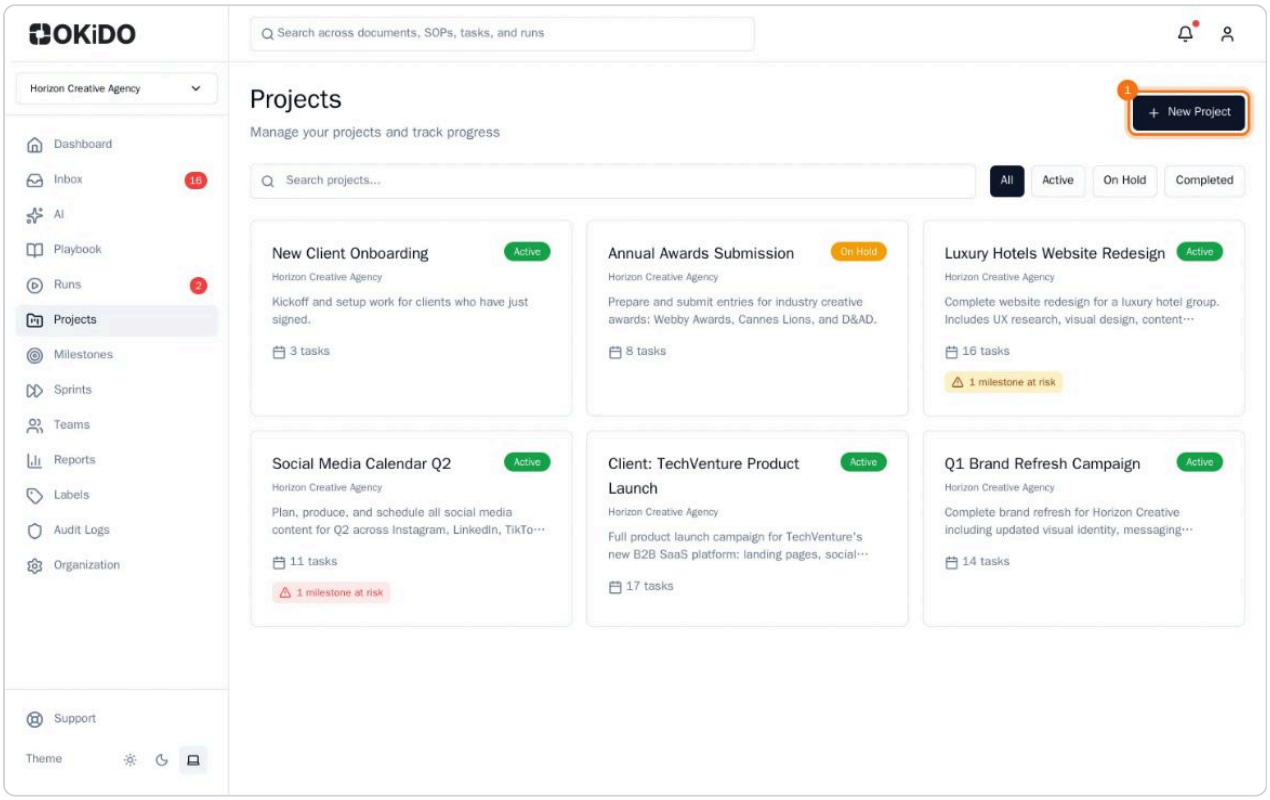
Create a project, choose its type and decide who can see and edit it.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

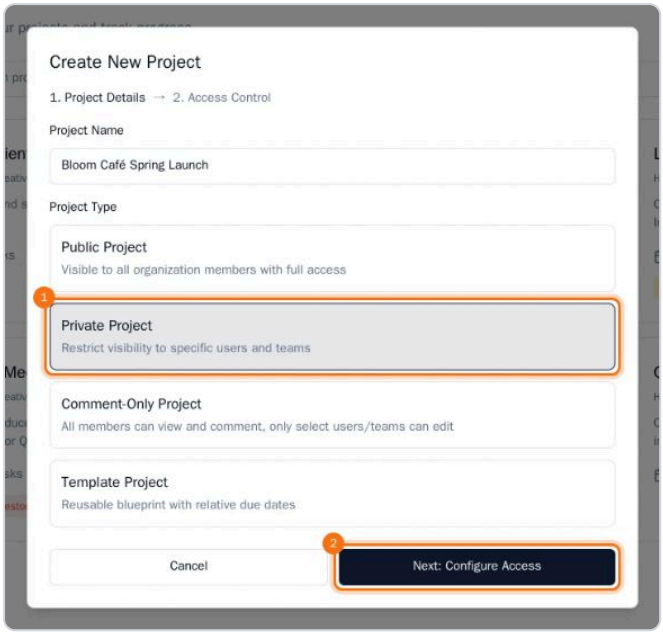
A project holds the tasks for one piece of work, such as a client campaign or a website redesign. Everyone in the organization can create public and template projects. Its type decides who can see it and who can change it.

Create a project

1. Choose **Projects** in the sidebar, then **New Project**.



2. Enter a **Project Name**.
3. Choose a **Project Type**:
   - **Public Project**: everyone in the organization can see and edit it.
   - **Private Project**: only the people and teams you choose can see it.
   - **Comment-Only Project**: everyone can see it and comment, but only the people and teams you choose can edit it.
   - **Template Project**: a reusable blueprint with relative due dates, see Reuse a project as a template.



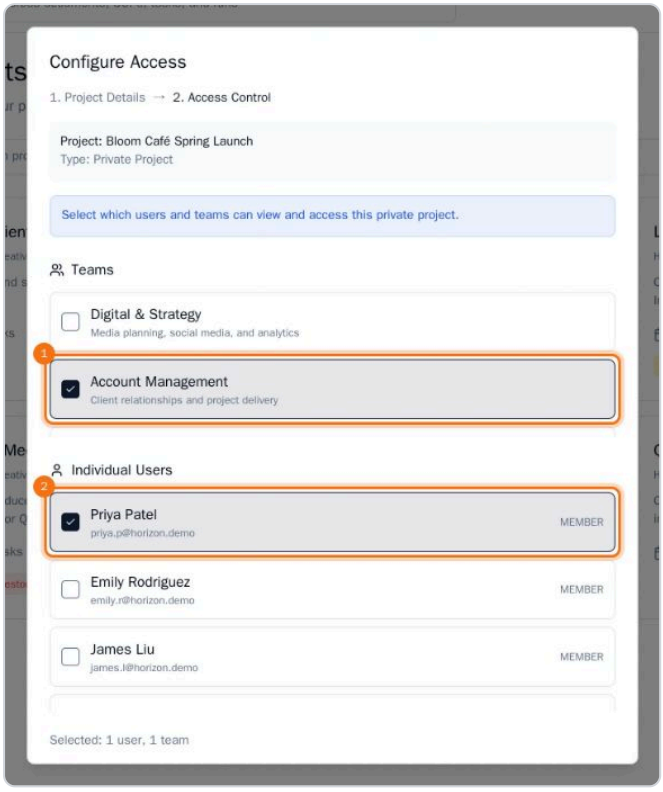
4. For a public or template project, choose **Create Project**. For a private or comment-only project, choose **Next: Configure Access** and continue below.

Private, comment-only and template projects are available on the PRO and BUSINESS plans. On STARTER, every project is public.

Choose who gets access

A private project needs at least one person or team who can see it. A comment-only project needs at least one person or team who can edit it. Choosing them takes an organization owner or admin: for members, this step cannot load the people and teams.

1. Select the teams under **Teams** and the people under **Individual Users**. Select a team to include everyone in it.
2. Choose **Create Project**.



The new project appears at the top of the project list, with a badge for its type. Its board starts with three columns: for tasks to do, in progress and done. You always keep access to a private project you created.

> **Tip:** Changed your mind later? The person who created a project can switch it between public and private, see Control who can see a project.

Control who can see a project

Make a project private or public, and add or remove the people and teams who can open a private project.

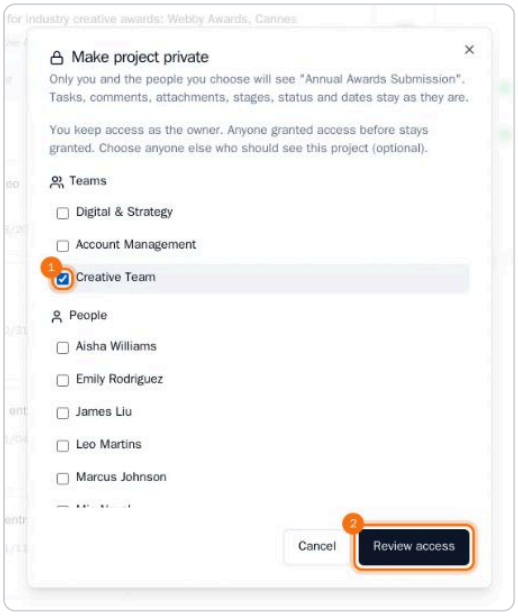
Available on: Pro · Business | Who can do this: Owner, Admin

A public project is open to everyone in the organization. A private project is only for the people and teams you grant access, plus the person who created it. Organization owners and admins do not see a private project automatically: grant them access if they need it.

Make a project private

Only the person who created the project can switch it between public and private.

1. Open the project and choose **Make private**.
2. Select the teams and people who should see the project, then choose **Review access**.



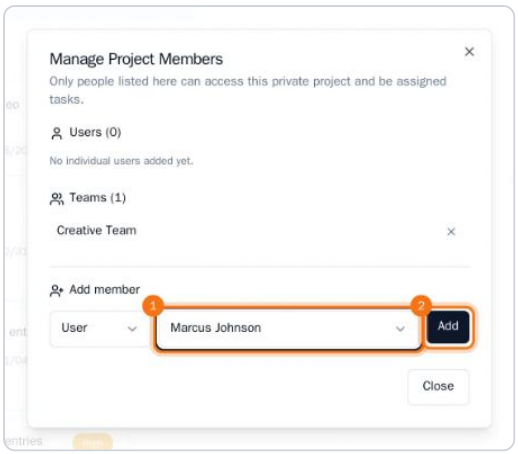
3. Check the list under **Who will have access**, then choose **Make private**.

The project now has a **Private** badge and a **Members** button. Its tasks, comments, columns and dates stay as they are. People who lose access keep the tasks assigned to them, but can no longer open them.

Add or remove people and teams

Organization owners and admins who can see the private project can change who else can.

1. Open the project and choose **Members**.
2. Under **Add member**, choose **User** or **Team**, pick the person or team, then choose **Add**.



3. To remove a team, choose the cross next to its name.
4. To remove a person, choose the cross next to their name. Under **Re-assign their tasks to**, pick who takes over their tasks in this project, or keep **Leave unassigned**, then choose **Remove**.

Only the people listed here, the members of the listed teams and the person who created the project can open it and be assigned its tasks.

Make a project public again

1. Open the project and choose **Make public**.
2. Select **I understand, make it public**, then choose **Make public**.

Everyone in the organization can see the project and all of its tasks again.

Switch between List, Board, Calendar and Gantt

Look at a project's tasks as a list, a board, a calendar or a Gantt chart, and pick the view that fits the job.

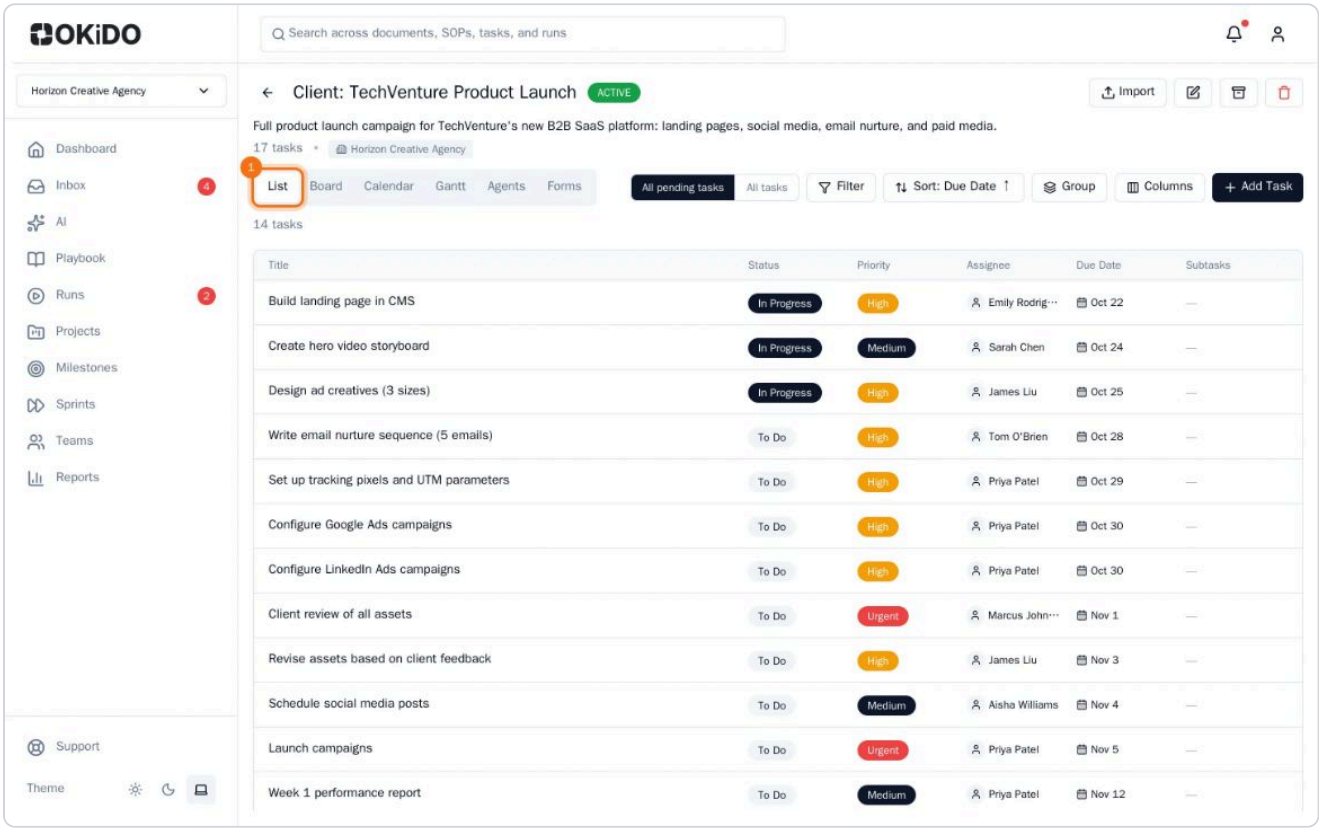
Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Every project can show its tasks in four views. They all show the same tasks, so switch whenever another view suits what you are doing: a list to go through details, a board to move work along, a calendar to see what is due when, and a Gantt chart to plan over time. A project opens on its board.

To switch, open the project and choose **List**, **Board**, **Calendar** or **Gantt** above the tasks.

Go through tasks in a list

1. Choose **List**.
2. Choose **Columns** to show or hide columns, such as **Team** or **Stage**.
3. Click a task to open it.

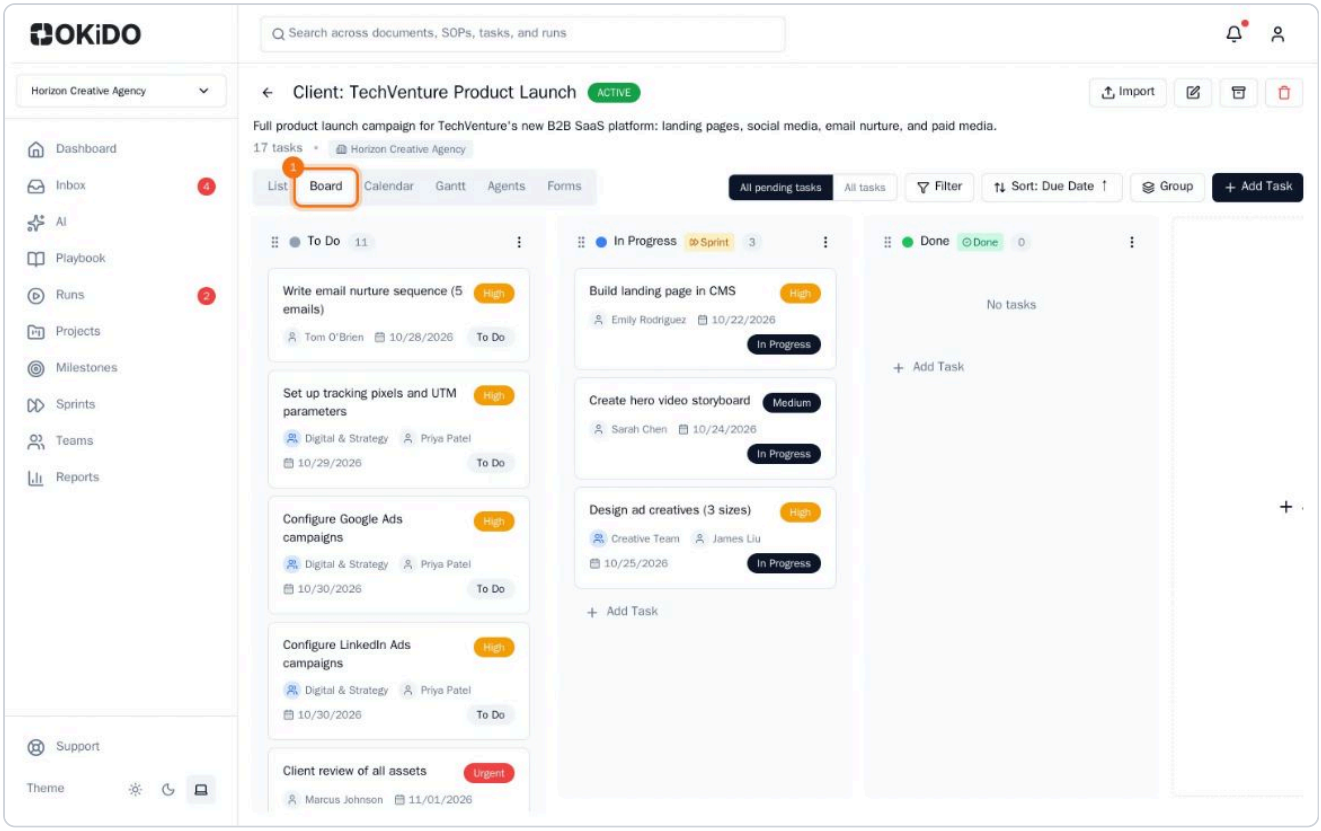


Each task is a row with its status, priority, assignee, due date and subtasks.

Move work along on the board

1. Choose **Board**.

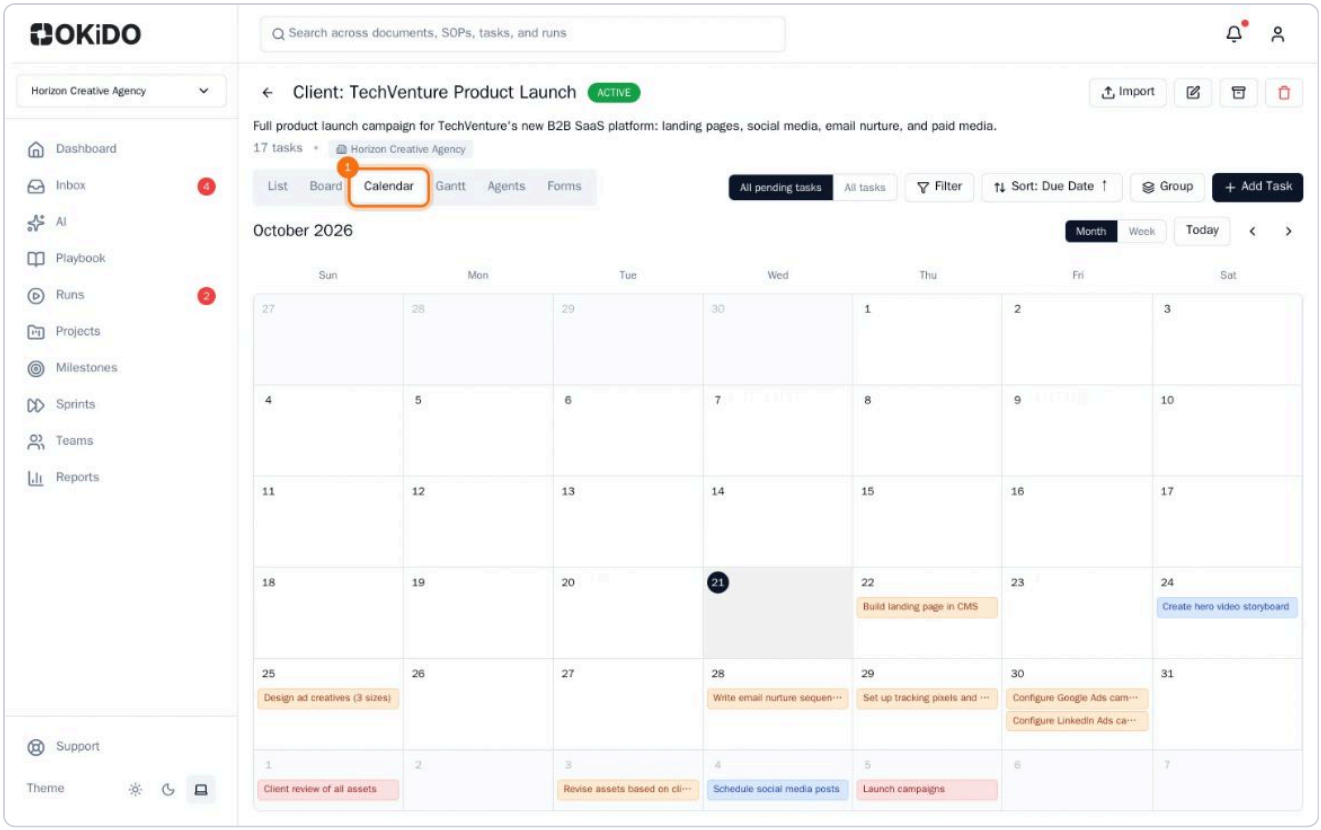
2. Drag a card to another column to move the task to that stage, or up and down to change its order.
3. Choose **Add Task** at the bottom of a column to add a task to it.



Each column is a stage of the work. To add, rename or reorder columns, see Set up board columns.

See what is due in the calendar

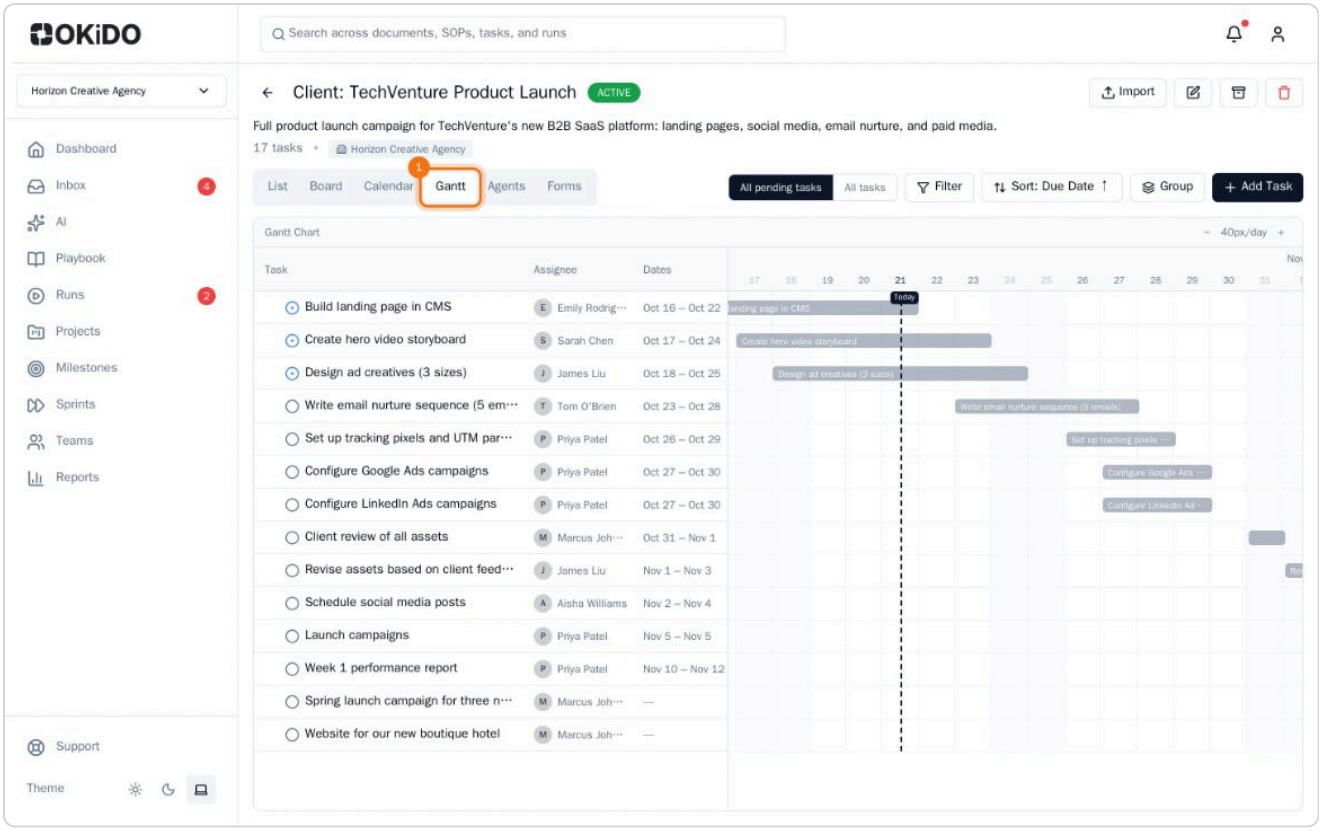
1. Choose **Calendar**.
2. Choose **Month** or **Week**, and use the arrows to go back or forward. **Today** brings you back to today.



Tasks appear on their due date. A task with a scheduled date runs from that date to its due date.

Plan over time in the Gantt chart

1. Choose **Gantt**.
2. Use **–** and **+** at the top right to zoom out and in.



Each task is a bar from its start date to its due date, and a task with only a due date shows as a short bar on that day. Tasks are grouped under their milestones, arrows connect tasks that block each other, and a line marks today. Set start dates in the task to get full bars.

> **Tip:** Every view hides done tasks at first. Choose **All tasks** in the toolbar to see them too. See Filter, sort and group tasks.

Filter, sort and group tasks

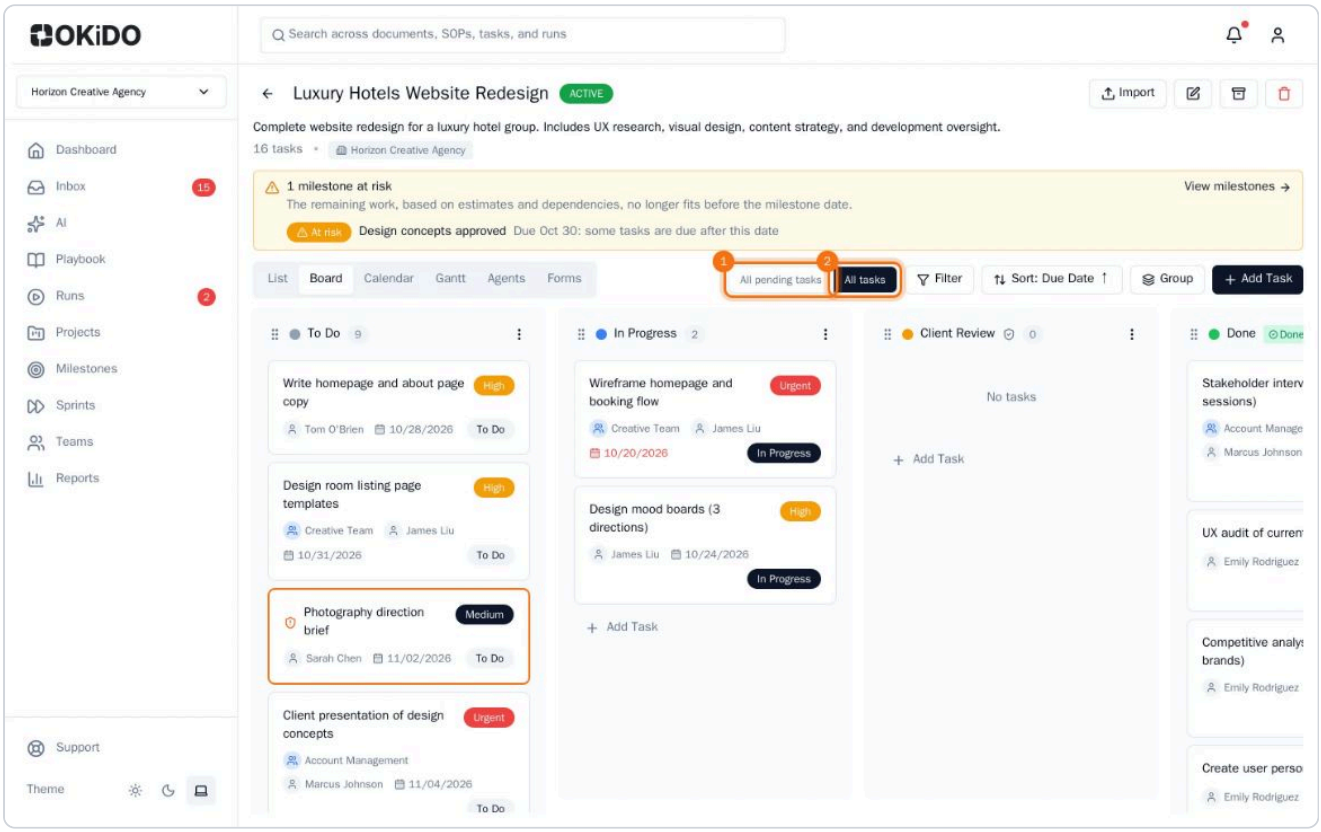
Use quick filters, field filters, sorting, grouping and list columns to find the tasks you need in a project.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

The toolbar above a project's tasks narrows down what you see, in every view. Your choices last while you work in the project and reset when you leave it. They change only what you see, never the tasks themselves.

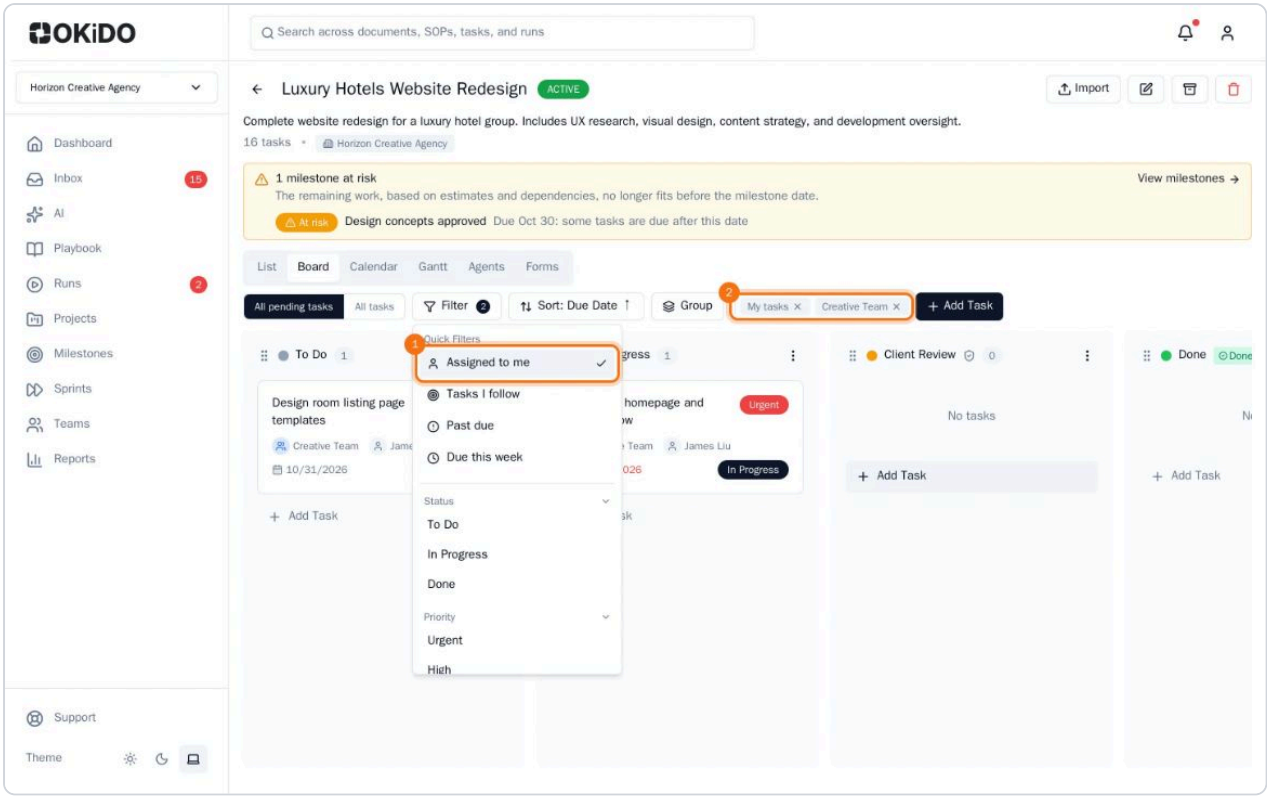
Show pending or all tasks

Choose **All pending tasks** to hide done tasks, or **All tasks** to see them too. A project opens with done tasks hidden.



Filter tasks

1. Choose **Filter**.
2. Under **Quick Filters**, choose **Assigned to me**, **Past due** or **Due this week**.
3. Or choose a value under **Status**, **Priority**, **Assignee**, **Team**, **Sprint** or **Created By**. **Sprint** only appears in projects with sprints.



Each filter you choose narrows the tasks further: a task shows only when it matches all of them. **Assigned to me** also includes tasks waiting for your approval.

The **Filter** button shows how many filters are on, and the filters appear next to the toolbar. Choose the cross on one to remove it, or **Clear all filters** in the filter panel to remove them all.

Sort tasks

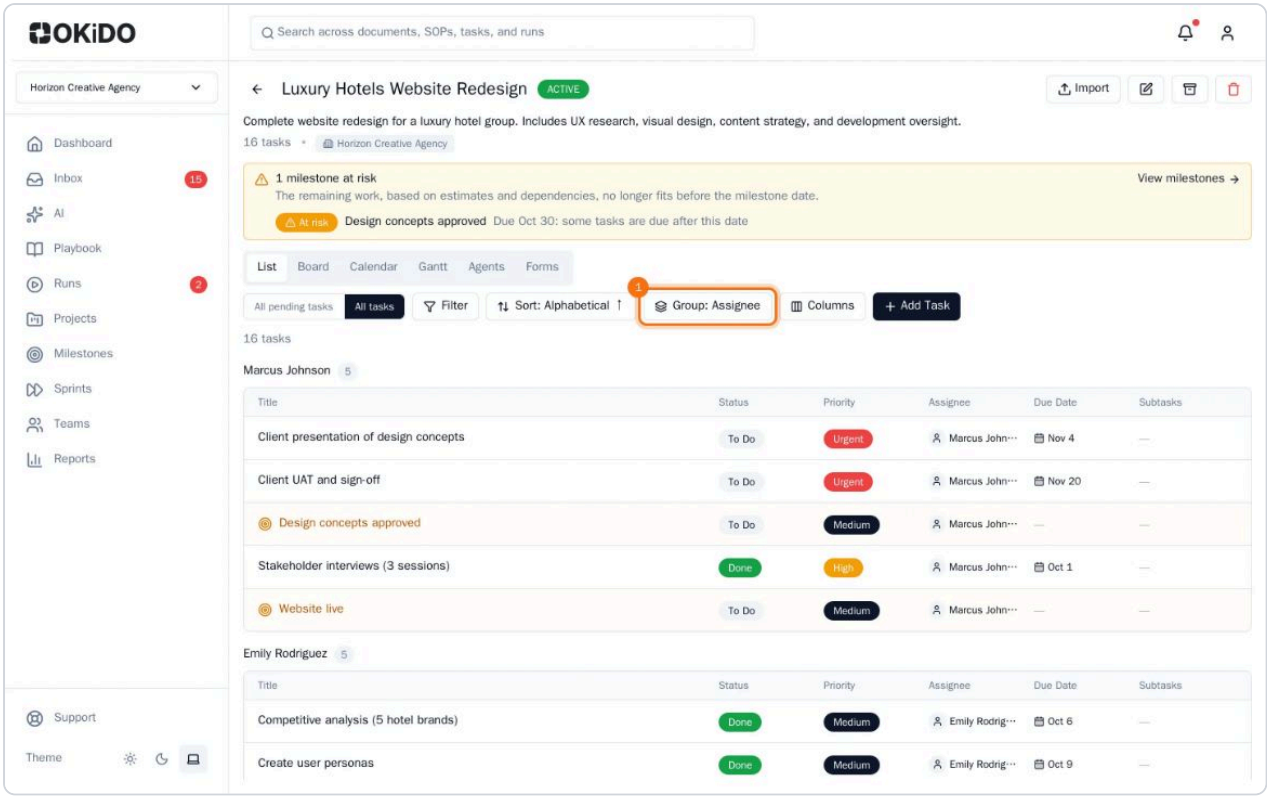
1. Choose the sort button next to **Filter**. It shows the current order.
2. Choose **Due Date**, **Assignee**, **Created**, **Modified**, **Completed**, **Priority** or **Alphabetical**.

Choose the same field again to reverse the order. Tasks are sorted by due date at first, earliest first.

Group tasks in the list

Grouping works in the **List** view.

1. Choose **Group**.
2. Choose **Status**, **Priority**, **Assignee**, **Team**, **Stage** or **Sprint**.



The list now shows a heading with a count for each group. Choose **None** to show one list again.

Choose the list columns

1. In the **List** view, choose **Columns**.
2. Choose a column to show or hide it, for example **Team**, **Stage** or **Created**.

A check mark shows which columns are on.

Set up board columns

Add, rename, recolor, reorder, collapse, merge and delete the columns of a project's board, and choose the column for finished work.

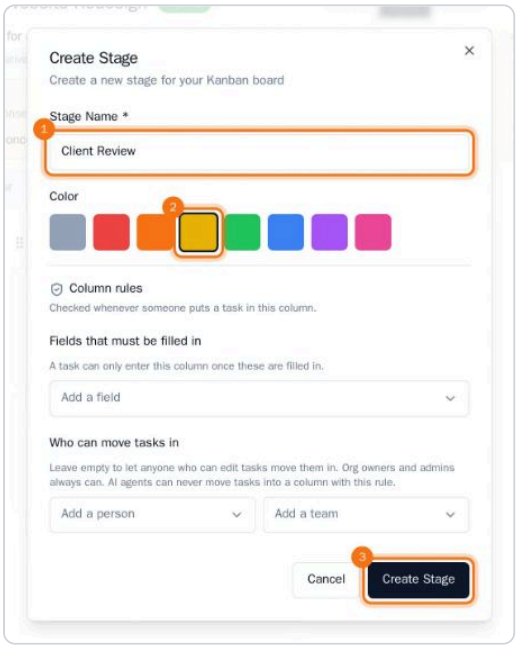
Available on: Starter · Pro · Business | Who can do this: Owner, Admin

Each column on a project's board is a stage the work goes through. Shape the columns to match how your team works, for example with a column for client review before work is done.

Organization owners and admins can add, rename, recolor, move and delete columns and choose the done column. Anyone in the project can collapse and merge columns, and that changes the board for everyone.

Add a column

1. Open the project's **Board** and choose **Add Stage** to the right of the last column.
2. Enter a name and pick a **Color**.
3. Choose **Create Stage**.



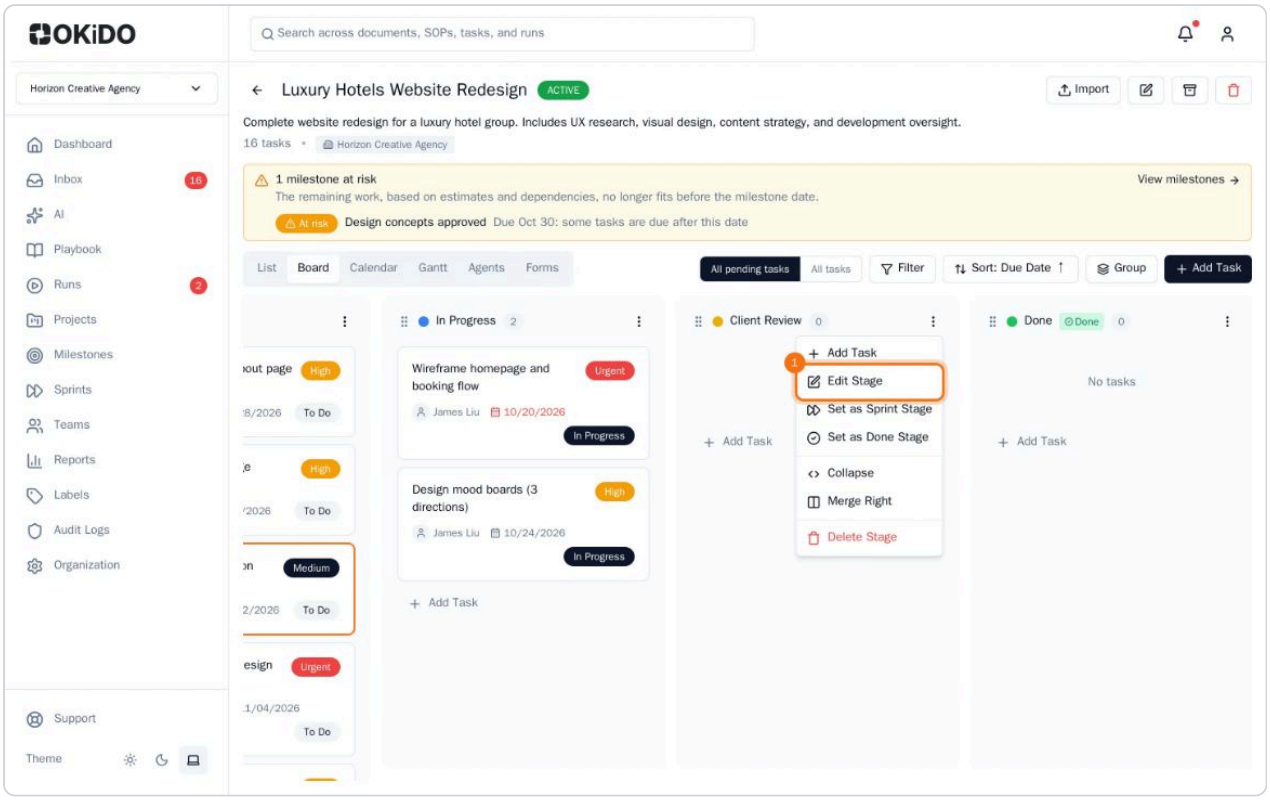
The new column appears at the right end of the board.

Move a column

Drag the column by the grip (the dotted icon) to the left of its name to the new place. The board saves the new order right away.

Rename or recolor a column

1. Choose the menu button at the top right of the column, then **Edit Stage**.



2. Change the name or the color.
3. Choose **Update Stage**.

The same dialog also holds the column's rules, see Add rules to a column.

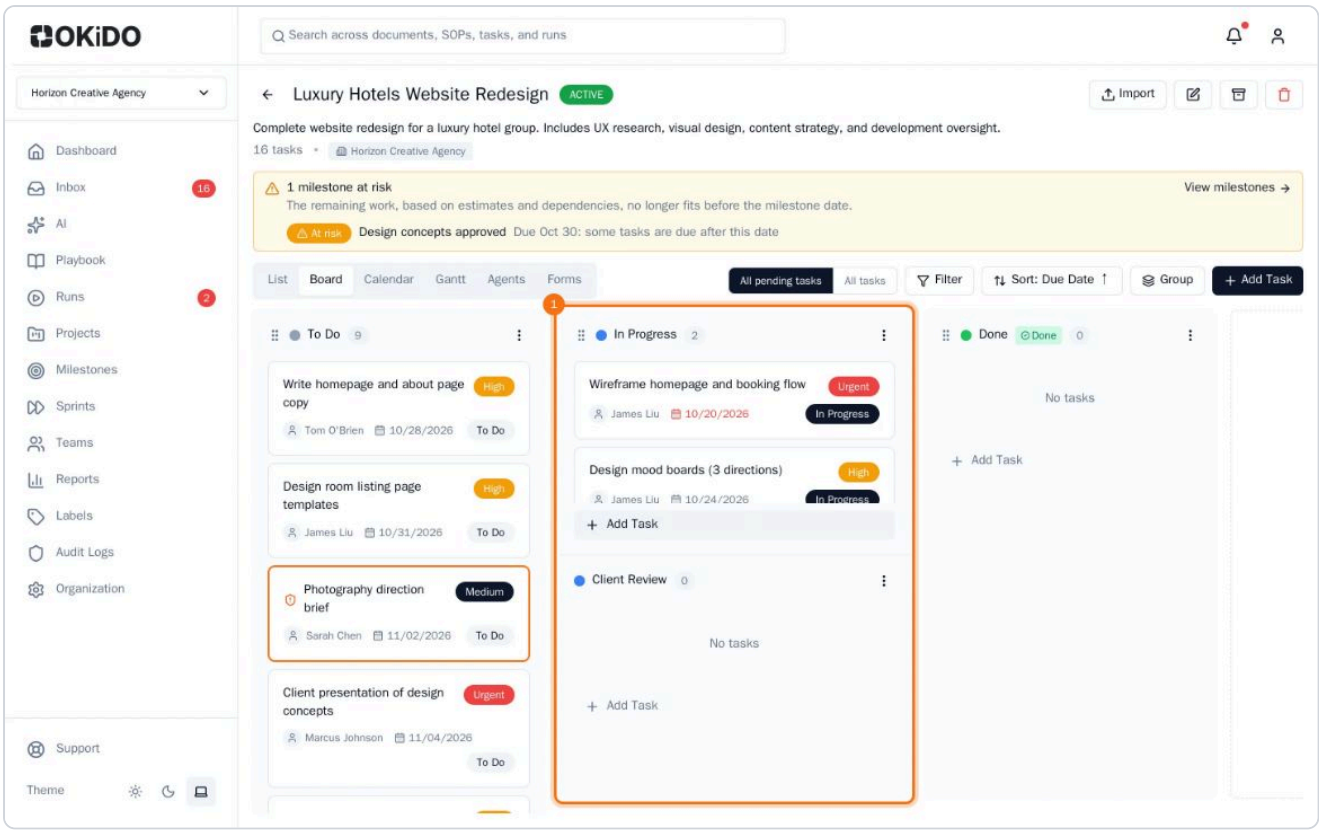
Choose the done column

1. Choose the column's menu button, then **Set as Done Stage**.

The column gets a **Done** badge. When someone marks a task as done, it moves into the first done column to its right on its own. A new project's last column is a done column from the start. Choose **Remove Done Stage** to turn it off.

Collapse or merge columns

- To collapse a column, choose **Collapse** in its menu. It becomes a narrow strip with its name and number of tasks. Click the strip to open it again.
- To merge a column with the one to its right, choose **Merge Right** in its menu. Both stay separate stages, stacked in one column. Choose **Unmerge** in the menu of the top stage to split them again.



Delete a column

1. Move the column's tasks to another column first: a column with tasks cannot be deleted.
2. Choose the column's menu button, then **Delete Stage**.

The column is deleted at once, without a question.

Add rules to a column

Require fields to be filled in before a task can enter a column, and limit who may move tasks into it.

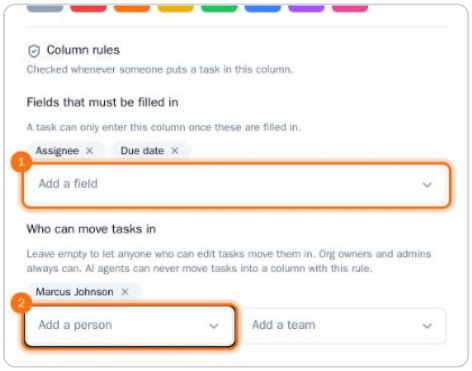
Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Column rules keep work from moving on before it is ready. For example, a task can only go to client review once it has an assignee and a due date, and only the account manager decides what goes to the client.

The project owner sets the rules: the person who created the project, or an organization owner or admin.

Set the rules of a column

1. On the project's **Board**, choose the menu button at the top right of the column, then **Edit Stage**.
2. Under **Fields that must be filled in**, choose **Add a field** and pick a field, such as **Assignee** or **Due date**. Repeat for each field.
3. To require a label, or a field of a label, pick **Label fields** and then the label or field in the second list.
4. Under **Who can move tasks in**, choose **Add a person** or **Add a team** to name who may move tasks in. Leave it empty to let everyone who can edit tasks move them in.
5. Choose **Update Stage**.

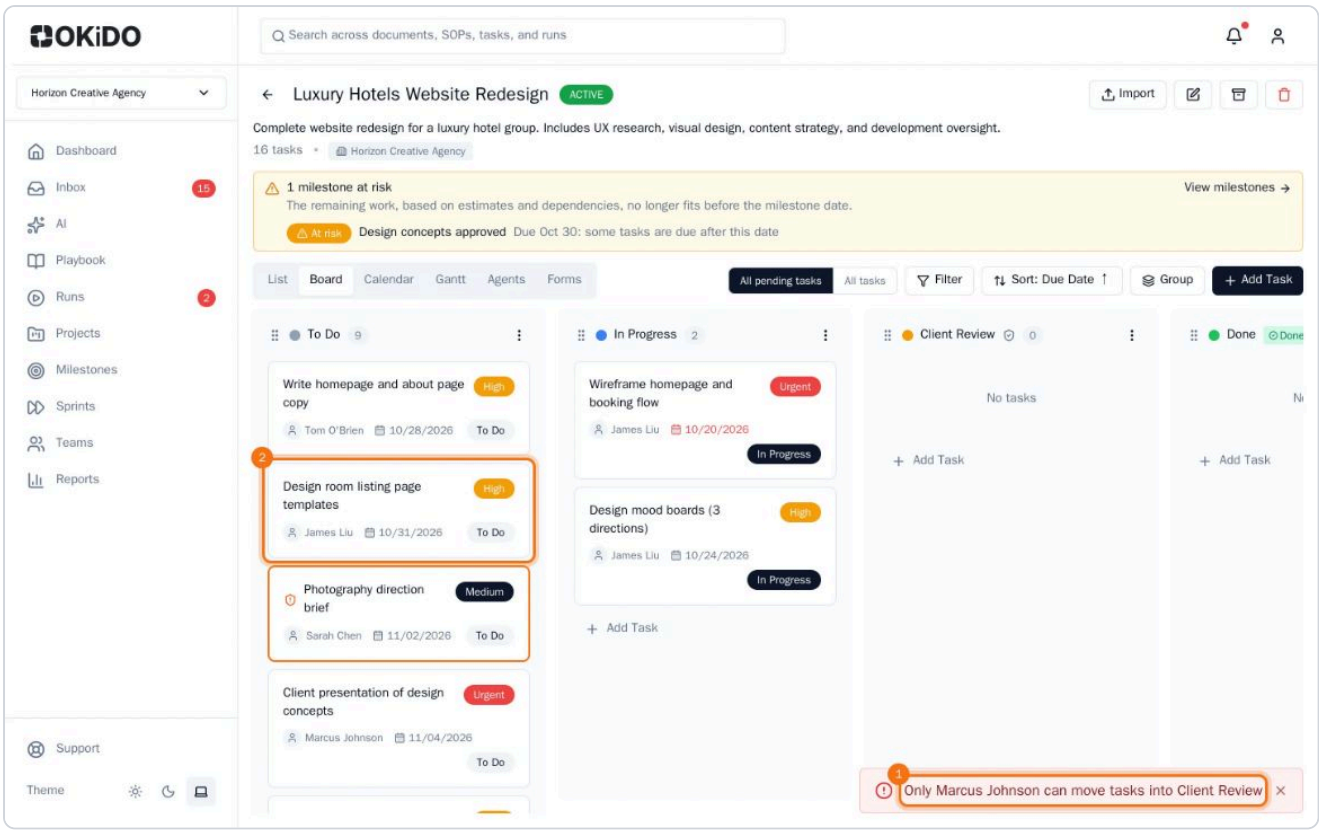


To remove a rule, choose the cross on it and save again.

What the rules do

The column shows a shield next to its name. Point at it to read its rules.

The rules are checked whenever a task enters the column: when someone drags it there, creates it there, or moves it there from the task. If a field is missing, the task stays where it was and a message says what to fill in. If the person may not move tasks into the column, the message says who can.



Organization owners and admins can always move tasks into the column, but the required fields still apply to them. AI agents can never move tasks into a column that limits who may move tasks in.

Import tasks from Asana, Trello, Jira, Monday or ClickUp

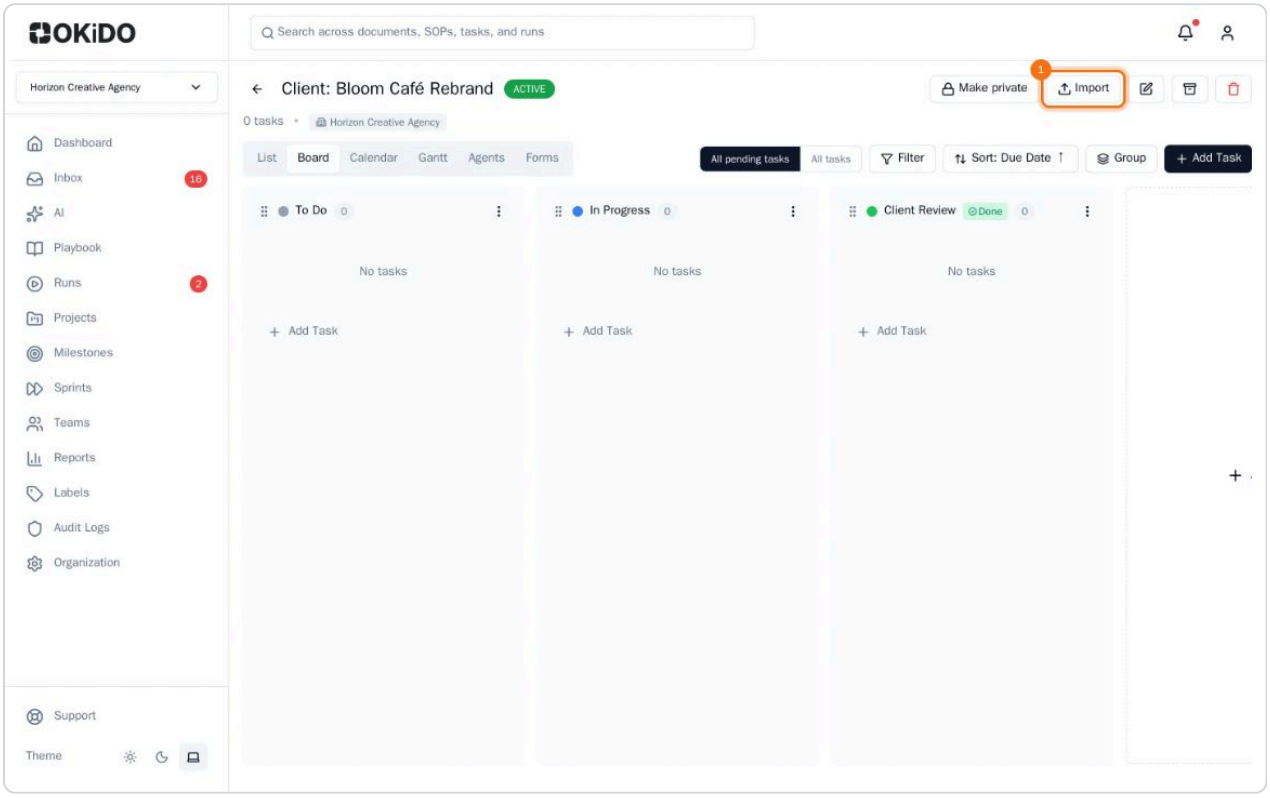
Bring tasks over from Asana, Trello, Jira, Monday.com or ClickUp into a project with the import wizard.

Available on: Starter · Pro · Business | Who can do this: Owner, Admin

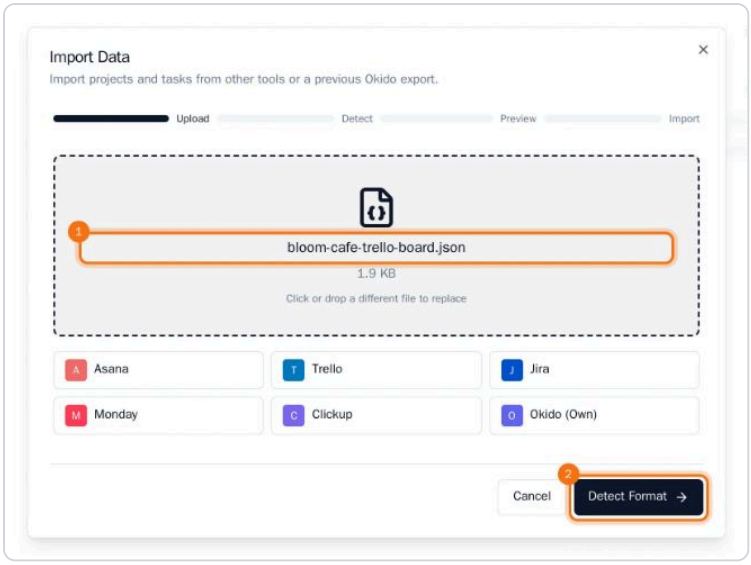
Moving to OKiDO from another tool? Export your board or project there as a JSON file, and the import wizard turns it into tasks. It recognizes exports from Asana, Trello, Jira, Monday.com and ClickUp, and OKiDO's own export. Organization owners and admins can import.

Import into a project

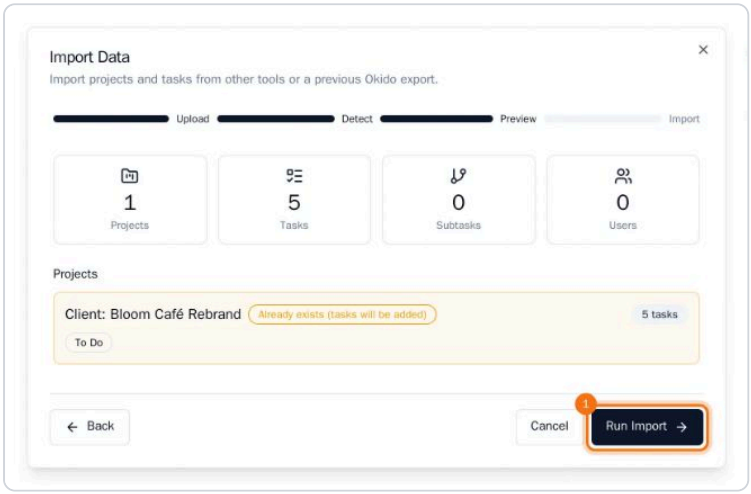
1. In the other tool, export the board or project as a JSON file.
2. Open the OKiDO project the tasks should go to and choose **Import**.



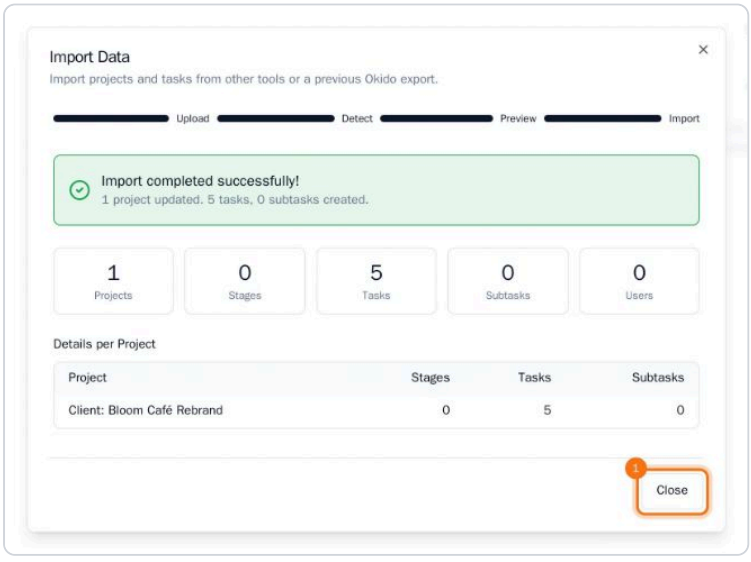
3. Drop the file on the wizard, or click there to pick it. Choose **Detect Format**.



4. Check that the wizard picked the right tool, then choose **Preview Import**.
5. Check the preview: how many tasks, subtasks and people come over, and the columns they go to. Choose **Run Import**.



6. When the wizard shows the result, choose **Close**.



The tasks are now in the project. Each one lands in the board column with the same name as its list or column in the other tool, and the wizard adds a column for any name the project does not have yet. Checklists become subtasks, and start and due dates come along.

People named in the file who are not in OKiDO get placeholder accounts in your organization. They cannot sign in until you connect their real accounts.

Import into new projects

To create projects from the file instead, choose **Organization** in the sidebar, open the **Data** tab and choose **Import Data**. The wizard works the same way. Each board or project in the file becomes a project with its name, or adds its tasks to an existing project with that name. See Import data into your organization.

> **Tip:** Importing the same file into the same project again does not create the tasks twice: tasks already there are skipped. Imported into another project, they are linked to it instead of copied.

Reuse a project as a template

Build a template project with relative due dates and start new projects from it with Clone.

Available on: Pro · Business | Who can do this: Everyone in the organization

Do you run the same kind of project again and again, such as a website launch for each new client? Build it once as a template. Its tasks get due dates relative to the project's start or launch date, and every new project you start from it gets real dates.

Create a template project

1. Choose **Projects**, then **New Project**.
2. Enter a name, choose **Template Project**, then choose **Create Project**.
3. Open the new project from the project list.

The project has a **Template** badge and a **Clone** button. Add columns and tasks as in any project.

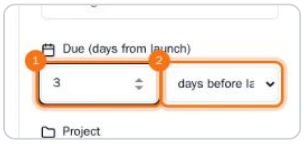
Count back from a launch date

A template plans from its start date at first: "5 days after start". For launches, events and deadlines, count back from the end instead: "10 days before launch". Organization owners and admins can change this.

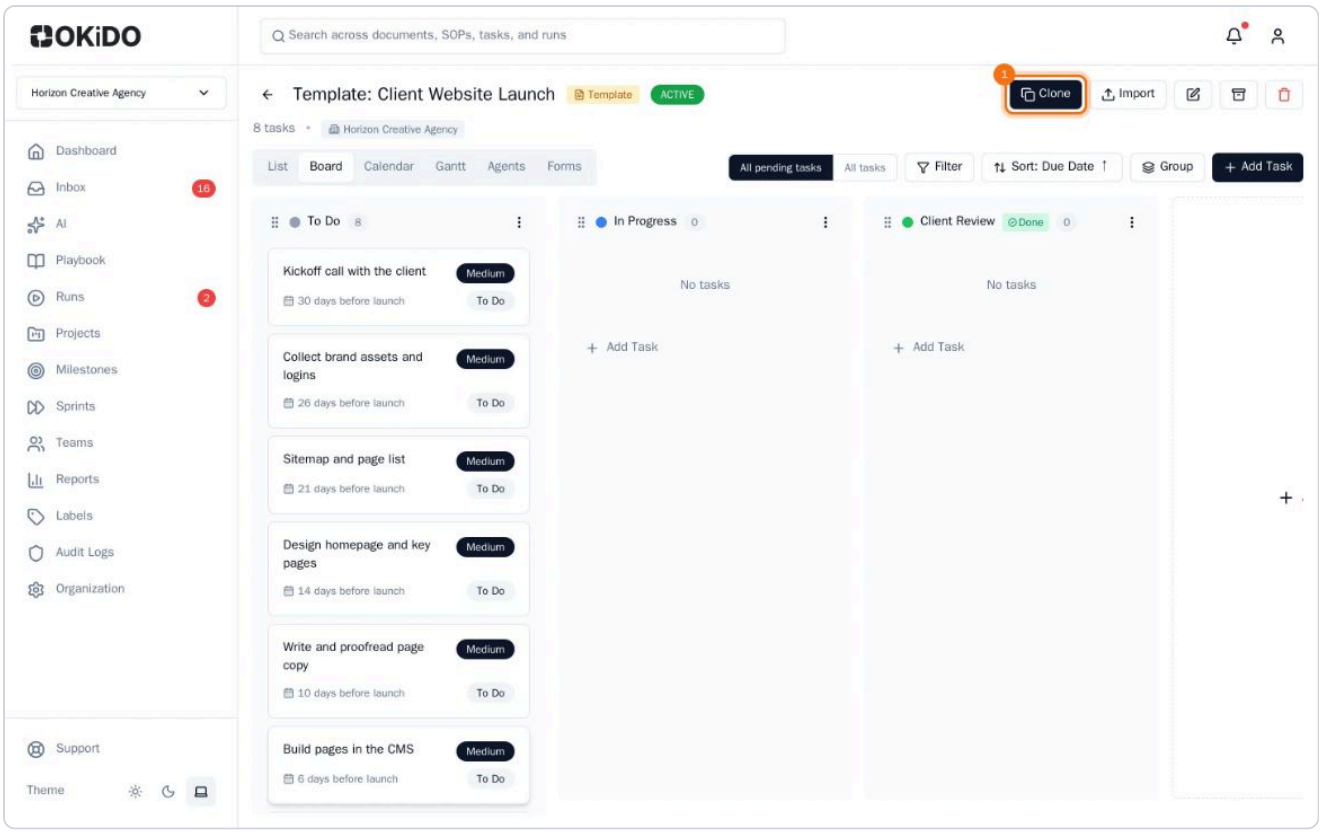
1. In the template, choose the project settings button (the pencil) at the top right.
2. On the **General** tab, set **Plan dates from** to **Launch or end date**.
3. Choose **Update Project**.

Give tasks relative due dates

1. Open a task in the template.
2. Under the due date, enter a number of days. In a template that counts back from launch, also choose **days before launch** or **days after launch**.

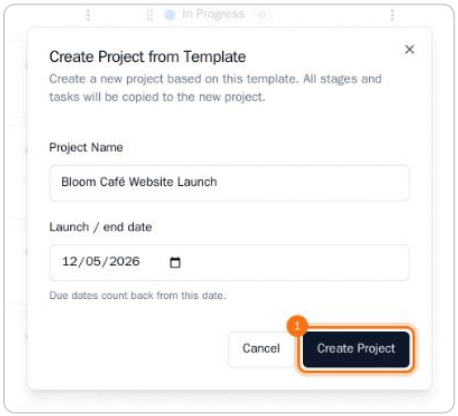


The task cards now show the relative due date instead of a calendar date.



Start a project from the template

1. Open the template and choose **Clone**.
2. Enter the **Project Name**.
3. Pick the date the template counts from: the **Launch / end date**, or the start date (optional: without one, today is the start).
4. Choose **Create Project**.



OKiDO opens the new project. It is a regular public project with the template's columns, tasks, labels and default labels, and each task has a real due date worked out from the date you picked. The template stays as it is, ready for the next one.

Archive or delete a project

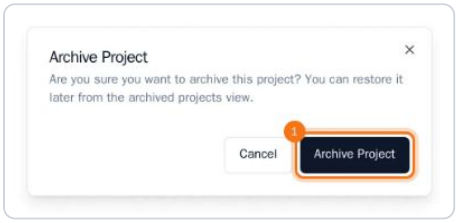
Archive a finished project to hide it from the project list, or delete a project with all its tasks for good.

Available on: Starter · Pro · Business | Who can do this: Owner, Admin

When a project is finished, archive it to keep the project list short. Delete a project only when you want it and everything in it gone. Only organization owners and admins can archive or delete projects.

Archive a project

1. Open the project and choose the archive button (the box) at the top right.
2. Choose **Archive Project**.

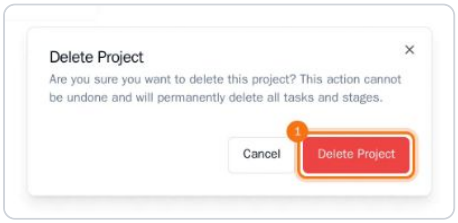


OKiDO takes you back to the project list, and the archived project no longer appears in it. Its tasks are kept.

> **Tip:** OKiDO has no list of archived projects yet, so you cannot bring one back from the app. Archive only projects that are really finished.

Delete a project

1. Open the project and choose the red delete button (the bin) at the top right.
2. Choose **Delete Project**.



The project is deleted with all its tasks and columns. This cannot be undone.

Give new tasks default labels

Choose the labels every new task in a project starts with, in the project settings.

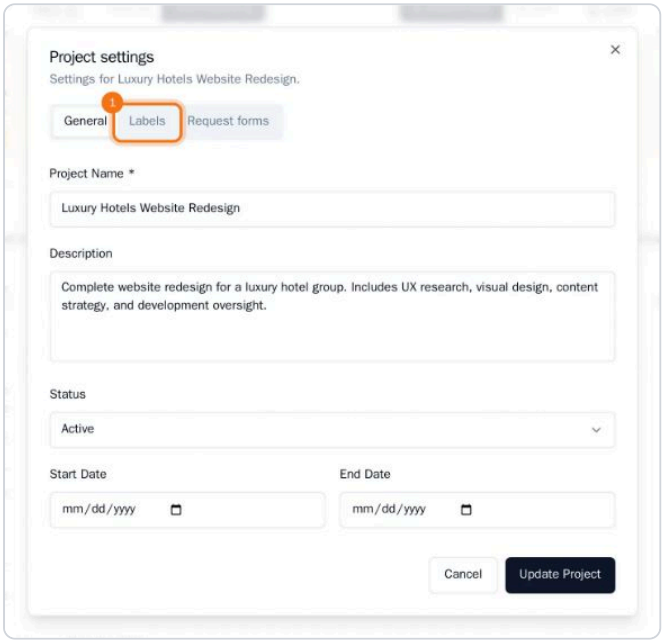
Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

When every task in a project should carry the same labels, such as Client Work for a client project, make them default labels. Every new task in the project then starts with them, whoever creates it. People can still remove a label from a single task.

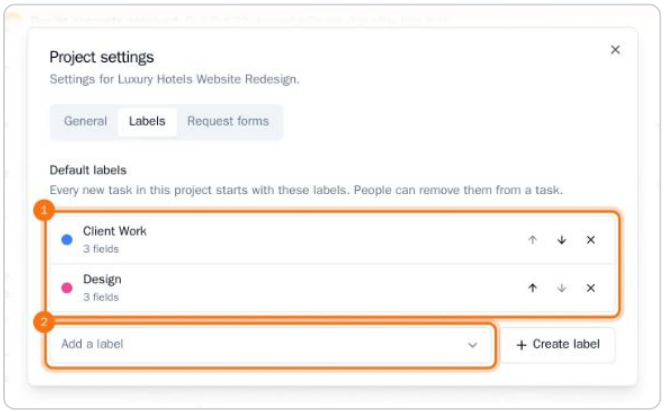
The project owner chooses the default labels: the person who created the project, or an organization owner or admin. Everyone else can look at them.

Choose the default labels

1. Open the project and choose the project settings button (the pencil) at the top right.



2. Open the **Labels** tab.
3. Choose **Add a label** and pick a label. Repeat for each label.



Every change is saved right away. The labels apply to tasks created from now on: tasks already in the project keep the labels they have.

Change the default labels

- Use the arrows next to a label to change the order.
- Choose the cross next to a label to remove it.
- Need a label that does not exist yet? Choose **Create label**, fill in the label and save. It is created for the whole organization and added to the project's default labels. See Create a Smart Label.

> **Tip:** Default labels also come along when you start a project from a template. See Reuse a project as a template.

CHAPTER 4

Tasks

Create a task

Break a task into subtasks

Comment, mention people and check activity

Follow, share or print a task

Attach files and record a briefing

Add Smart Labels to a task

Make a task wait for another

Request an approval

Make a task repeat

Track time on a task

Move a task to another project or organization

Hand a task to an AI agent

Read this chapter online

okido.io/en/docs/tasks

Scan the code or open the link to read this chapter online, where it is always up to date.

Create a task

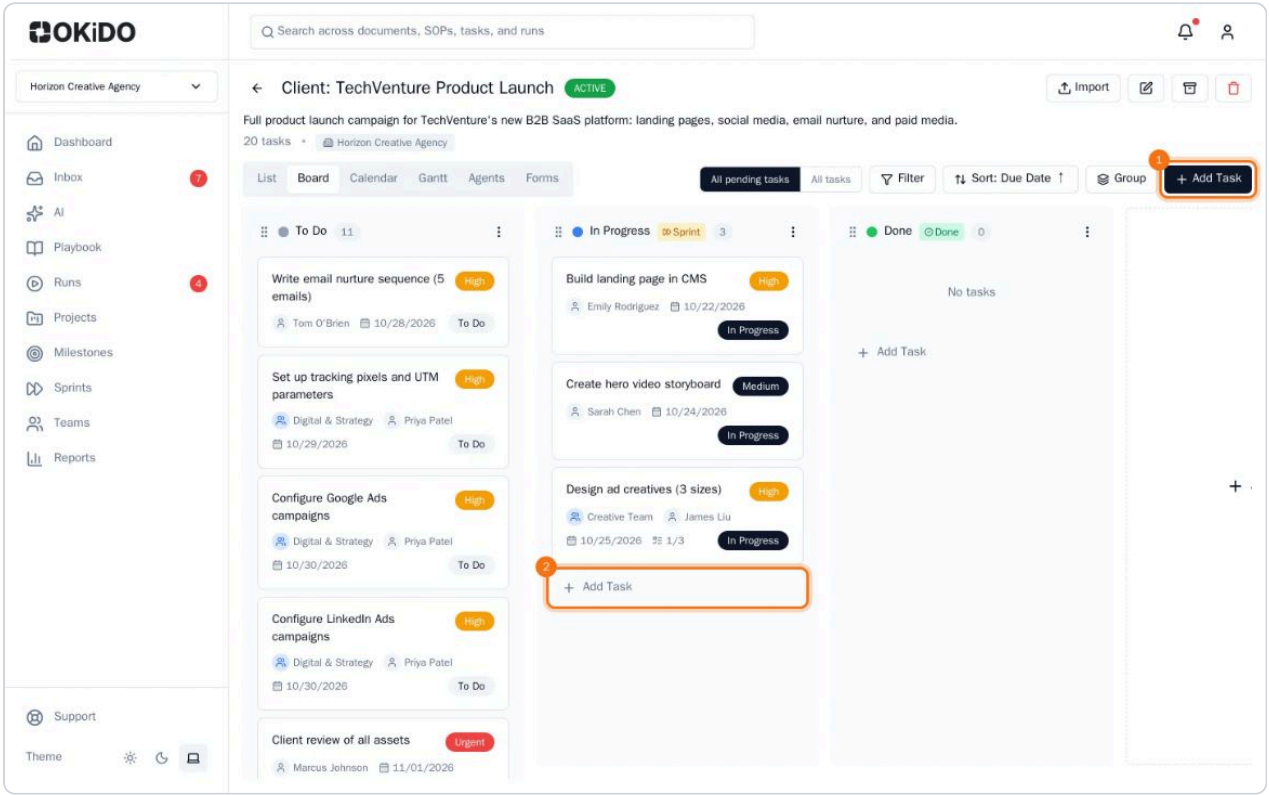
Add a task to a project and fill in who does it, its status, priority, dates, sprint and description.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Every piece of work in a project is a task. A new task opens as soon as you add it, so you can give it a title and fill in the details right away.

Add a task

1. Open the project and choose **Add Task** at the top right. The task is added to the first column of the board.
2. To add a task to another column instead, choose **Add Task** at the bottom of that column.

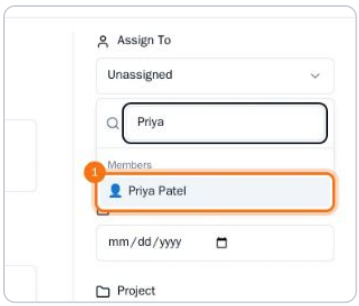


3. The new task opens with its title selected. Type a title and press Enter.

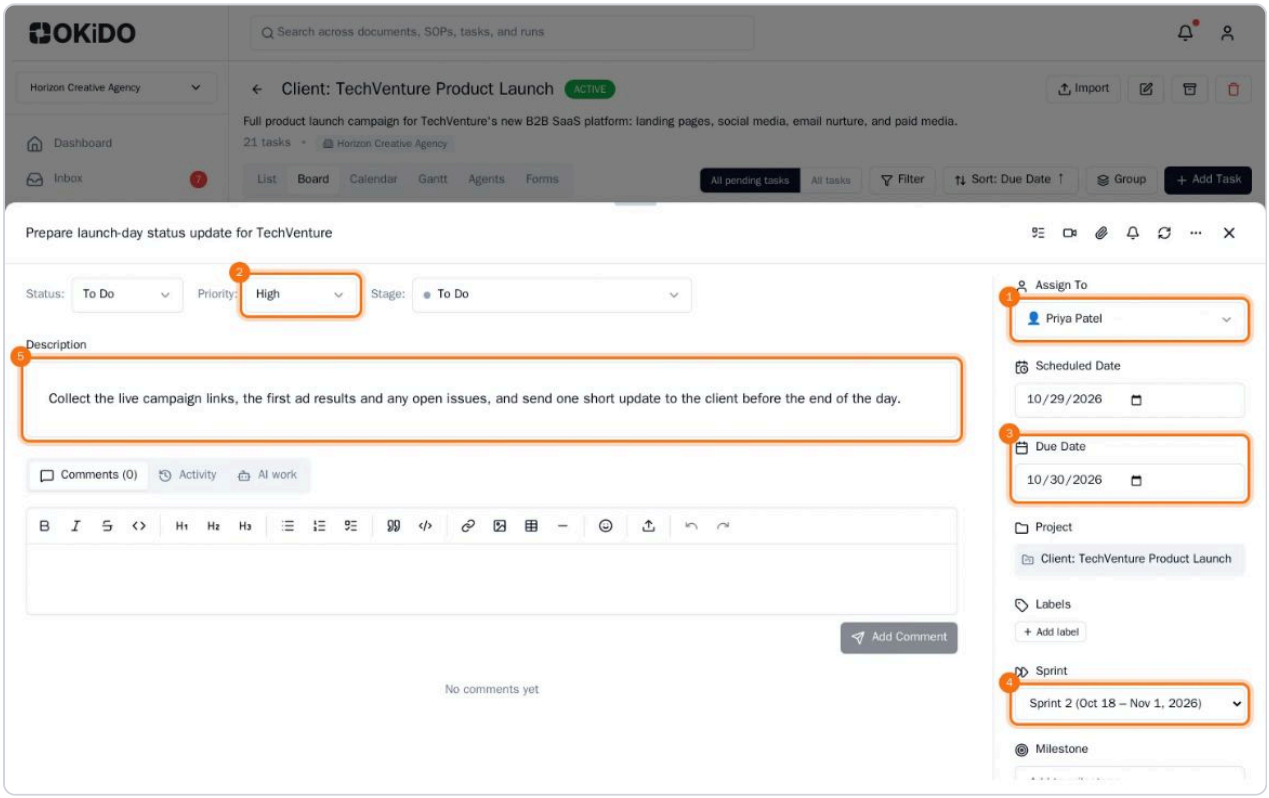
Fill in the details

Everything you change in the task saves right away.

1. Under **Assign To**, choose who does the work: a person, a team or an AI agent. Type a few letters to find them.



2. At the top of the task, choose its **Status** and **Priority**.
3. In the panel on the right, set the **Due Date**. Set a **Scheduled Date** as well if you plan to work on it on a particular day.
4. Under **Sprint**, choose the sprint the task belongs to if the project works in sprints.
5. Click the box under **Description** and write what needs to be done. The description saves while you type. Choose **Done** when you are finished.



Close the task to go back to the board. Its card shows the title, the assignee, the due date, the priority and the status.

> **Tip:** Click the title at the top of an open task to rename it at any time.

Break a task into subtasks

Split a task into smaller steps, put them in order and tick them off as the work gets done.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

When a task has several steps, add them as subtasks. Everyone can see what is left, and the card on the board counts how many steps are done.

Add subtasks

1. Open the task and choose **Add subtask** (the list icon at the top of the task).
2. Type the title of the first step and press Enter, or choose **Add**.



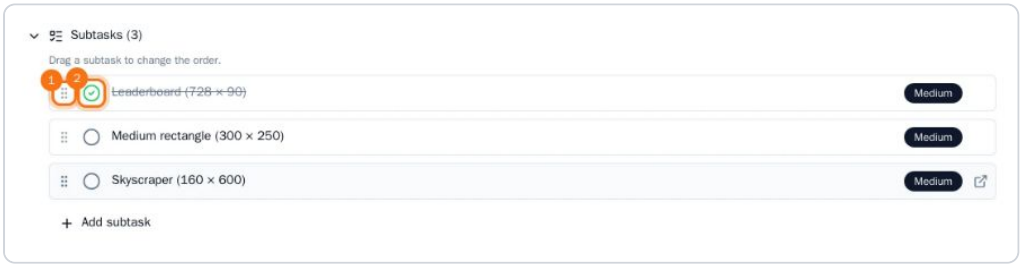
3. For the next step, choose **Add subtask** below the list and repeat.

Put them in order

Drag a subtask up or down the list by its handle on the left. The new order is saved as soon as you let go.

Tick them off

Click the circle in front of a subtask to mark it as done. Click it again if you need to reopen it.



The card on the board shows how many subtasks are done, for example 1/3, and turns green when all of them are.

> **Tip:** A subtask is a task of its own. Click its title to open it and give it an assignee, a due date or a description. The name of the main task at the top takes you back.

Comment, mention people and check activity

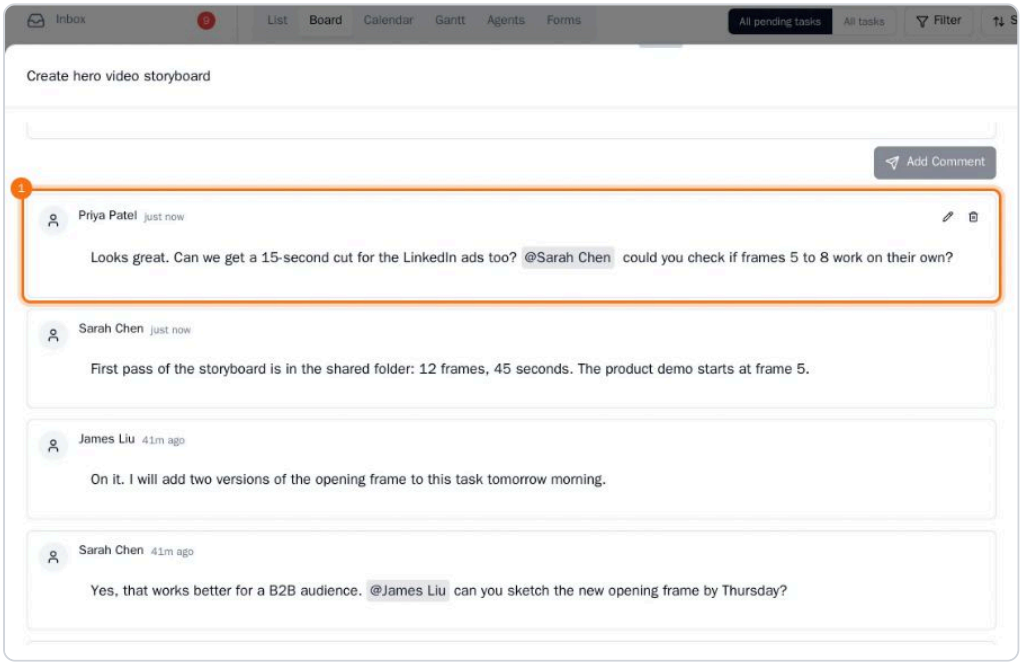
Discuss a task in its comments, @mention people or AI agents, and read the log of every change.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Talk about the work where it happens. Comments stay with the task, so whoever picks it up later can read the whole discussion, and the activity log shows everything that changed.

Add a comment

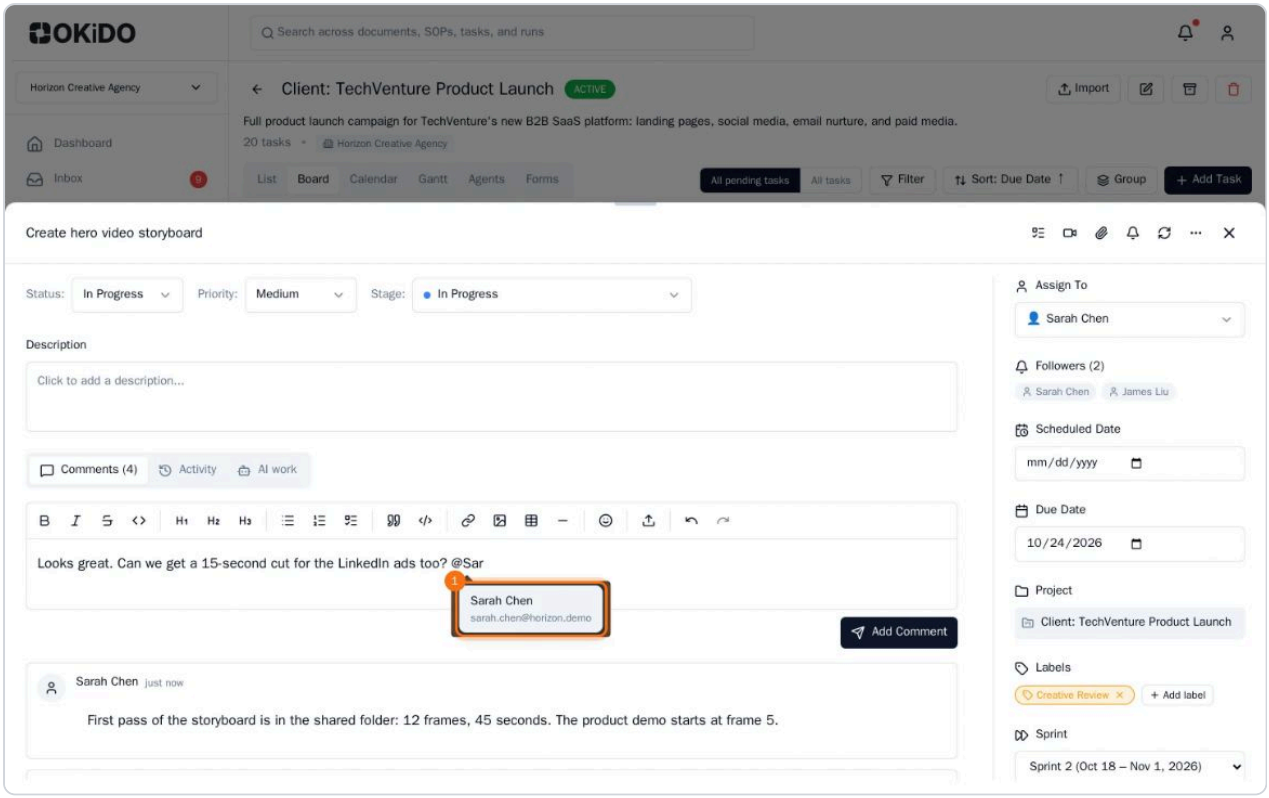
1. Open the task. The **Comments** tab is open below the description.
2. Write your comment in the box. Use the toolbar above it to format the text or to add a link, an image or a file.
3. Choose **Add Comment**.



Your comment appears at the top of the list. While it is the newest comment on the task, you can still change it with **Edit comment** or remove it with **Delete comment** (the pencil and the bin next to it). Once someone else has commented, it stays as it is.

Mention someone

1. In the comment box, type @ and the first letters of a name.
2. Choose the person from the list.

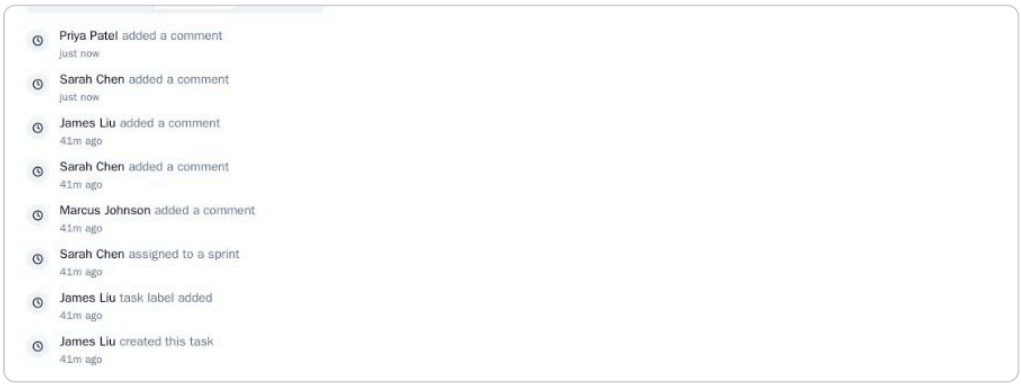


3. Finish the comment and choose **Add Comment**.

The person you mentioned gets a notification and starts following the task. AI agents appear in the same list, marked with a robot icon: an agent you mention reads the comment and replies in the comments.

Check the activity

Choose the **Activity** tab to see who created the task, who assigned it, and every change since, with the most recent first.



Follow, share or print a task

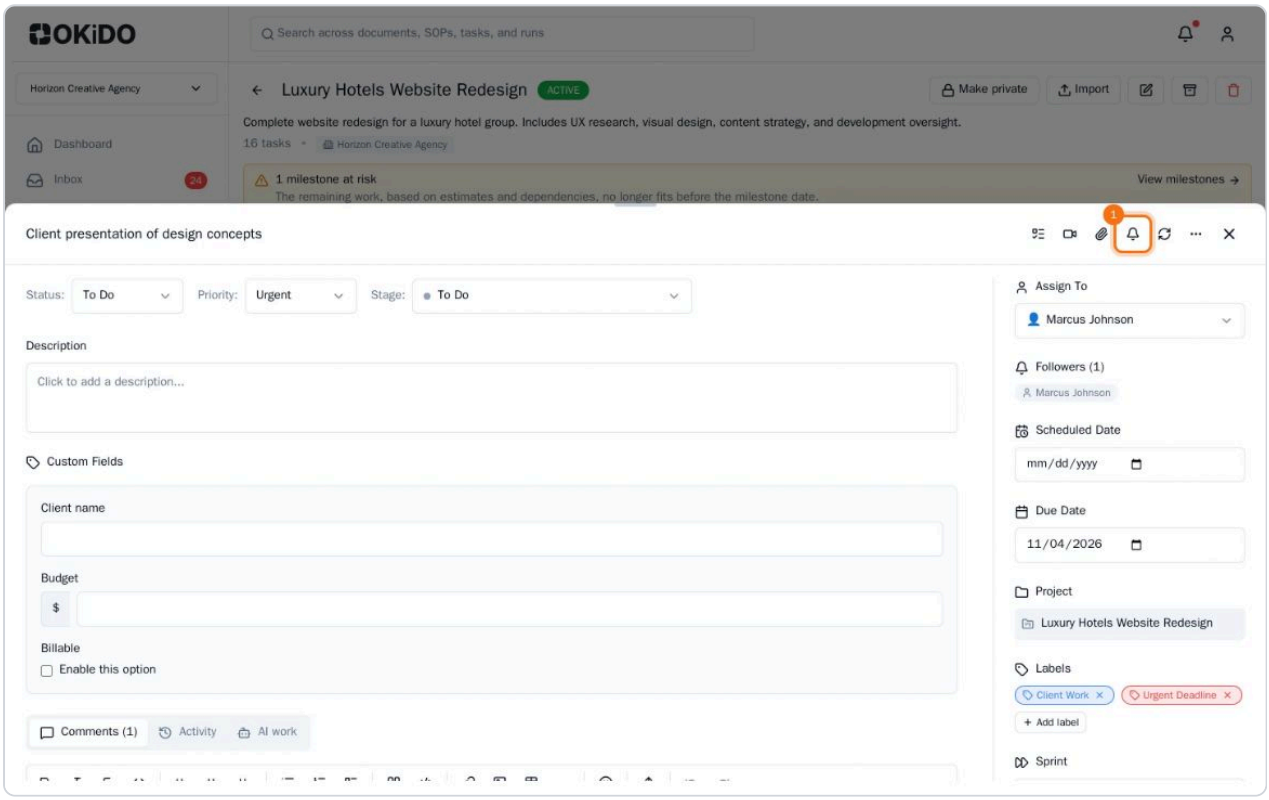
Follow a task to hear when it is done, ask the assignee for an update, copy its link, print it or create a follow-up task.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Keep an eye on work that matters to you without doing it yourself. Follow the task, nudge the person who does it, or pass the task on with a link.

Follow a task

1. Open the task and choose **Follow task** (the bell at the top of the task).



The bell turns blue and your name is added to the followers in the panel on the right. You get a notification when the task is completed or reopened. To stop, choose the bell again (**Unfollow task**).



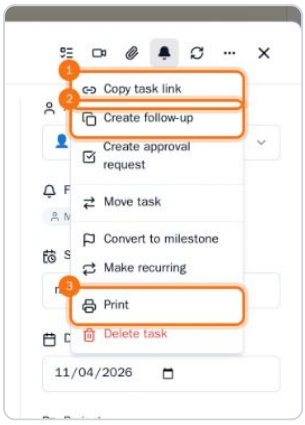
People you @mention in a comment start following the task as well.

Ask for an update

Choose **Request update** (the circular arrows at the top of the task). The person assigned to the task gets a notification asking for an update. This works on tasks assigned to someone else.

Copy the link, print or follow up

1. Choose **More actions** (the three dots at the top of the task).



2. Choose what you need:
   - **Copy task link** copies a link to the task. Paste it in a chat or an email: a colleague who opens it lands on this task.
   - **Create follow-up** adds a new task in the same column with the same priority, named after this one. Its description links back to this task. The new task opens right away.
   - **Print** opens your browser's print window for the task.

Attach files and record a briefing

Attach files to a task and record a short video of your screen and voice that explains the work.

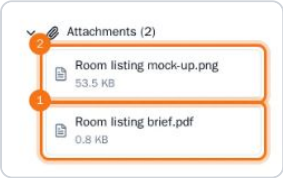
Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Give the person doing the work everything they need in one place. Attach the brief and the examples to the task, and record a short briefing in which you show your screen and talk them through it.

Attach files

1. Open the task and choose **Add attachment** (the paper clip at the top of the task).
2. Pick the file on your computer.

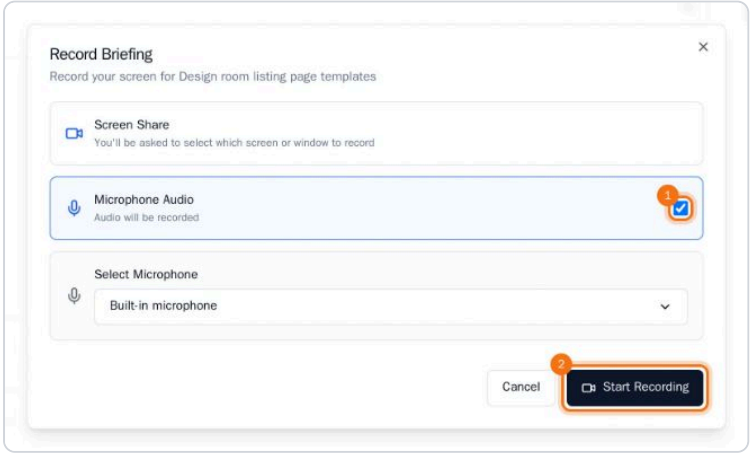
The file is listed under **Attachments** in the panel on the right, with its size. Click it to open it in a new tab. Repeat the steps for every file you want to attach.



> **Tip:** To put an image or a file inside the description or a comment, use the upload button in its toolbar.

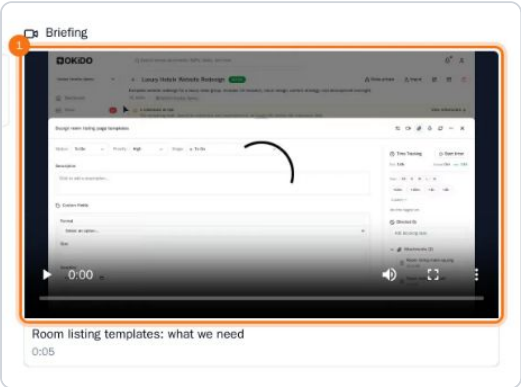
Record a briefing

1. Choose **Record briefing** (the camera at the top of the task).
2. Leave **Microphone Audio** on to record your voice, and choose your microphone if you have more than one.
3. Choose **Start Recording**. Your browser asks which screen, window or tab to share: choose one and confirm.



4. After a countdown of three seconds the recording starts. Show the work and explain it. Choose **Pause** if you need a moment, and **Stop Recording** when you are done.
5. Watch the preview. Give the briefing a title, add a description if you like and choose **Save Recording**. Not happy with it? Choose **Re-record** to start again.

The briefing now sits next to the task's description, ready to play for everyone who opens the task.



Add Smart Labels to a task

Put Smart Labels on a task and fill in the custom fields they bring along.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Labels group related work across all projects, such as everything for clients or everything that needs a design. A Smart Label can bring its own fields along, for example the client's name and the budget: put the label on a task and fill them in.

Add a label

1. Open the task. Under **Labels** in the panel on the right, choose **Add label**.
2. Tick each label the task should have. Type in the search box to find a label quickly. A number after a label's name tells you how many fields it brings along.
3. Choose **Done**.



Each label you tick is saved right away and shows on the task in its color. Click the × on a label to take it off again.

Fill in the custom fields

When a label brings fields along, they appear under **Custom Fields**, below the description. Fill them in: every change is saved straight away.



When two labels on a task have a field with the same name, the field shows only once.

> **Tip:** Owners and admins create labels and their fields on the Labels page: choose **Manage labels** at the bottom of the label list. See Add custom fields to a label.

Make a task wait for another

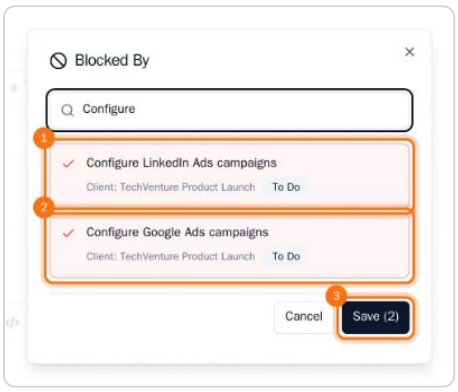
Mark which tasks block a task, spot date conflicts and see blocked work on the board and the dashboard.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Some work can only start when other work is finished: the campaigns can only go live once the ads are set up. Mark those other tasks as blocking it, and everyone sees what the task is waiting for.

Mark what blocks a task

1. Open the task that has to wait. Under **Blocked By** in the panel on the right, choose **Add blocking task**.
2. Search for the tasks that have to be finished first. The search covers every project, so a task can wait for work in another project.
3. Click each task that blocks this one, then choose **Save**.



The tasks you chose are listed under **Blocked By**, with their project and status. Click one to open it. That task lists the waiting task under **Blocking**.

When a blocking task is completed, it leaves the list. When the last one is done, the person assigned to the waiting task gets a notification that the work can start.

Spot date conflicts

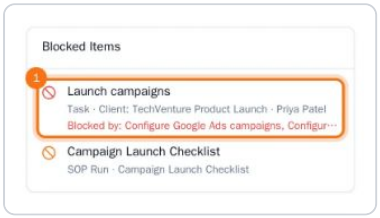
When a blocking task is due after the task that waits for it, the plan cannot work. The blocking task then shows **Due date conflict: blocker due later** in red. Move one of the two due dates to solve it.



To change the list later, choose **Edit blockers**.

See blocked work

On the board, a blocked task has a red no-entry sign in front of its title. On the dashboard, the **Blocked Items** widget lists every blocked task with the tasks it waits for.



> **Tip:** No Blocked Items widget on your dashboard? Choose **Customize**, then **Add Widget**. See Customize your dashboard.

Request an approval

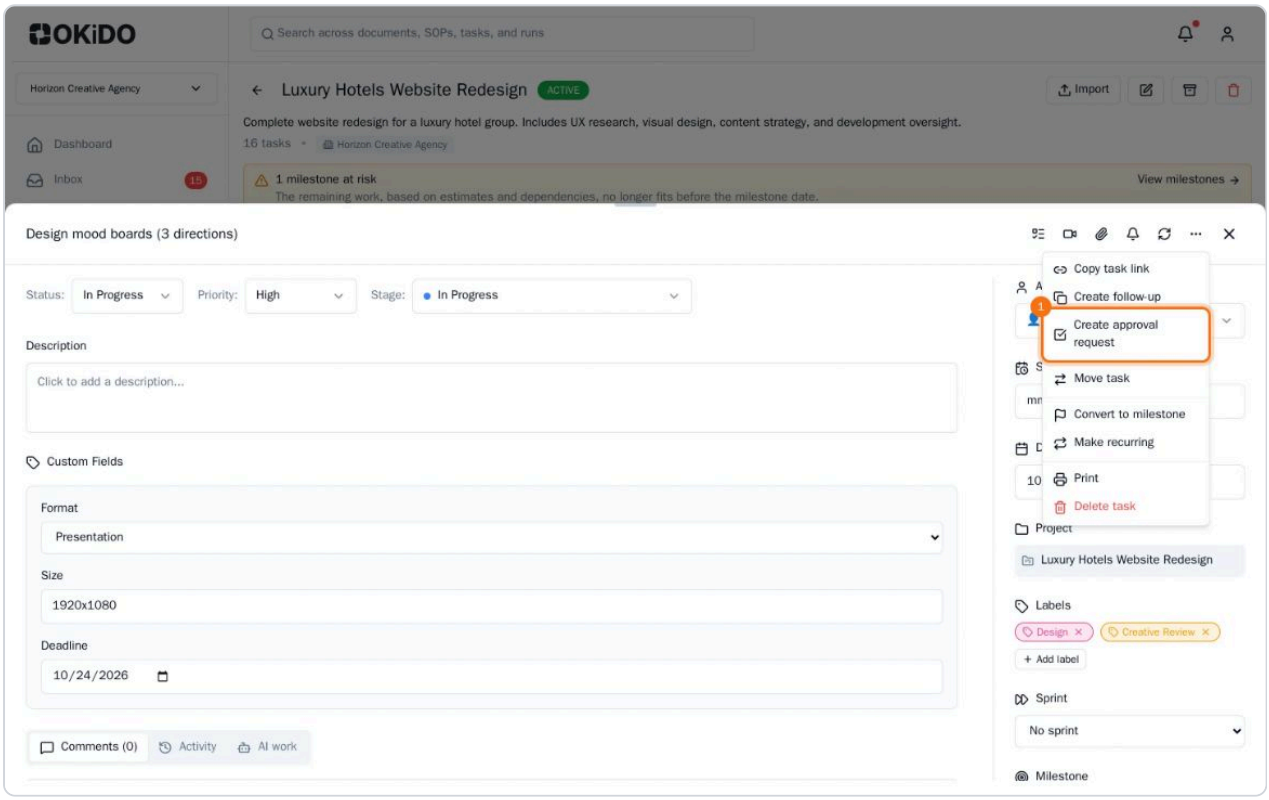
Ask one or more people to approve a task. The task completes when everyone has approved.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

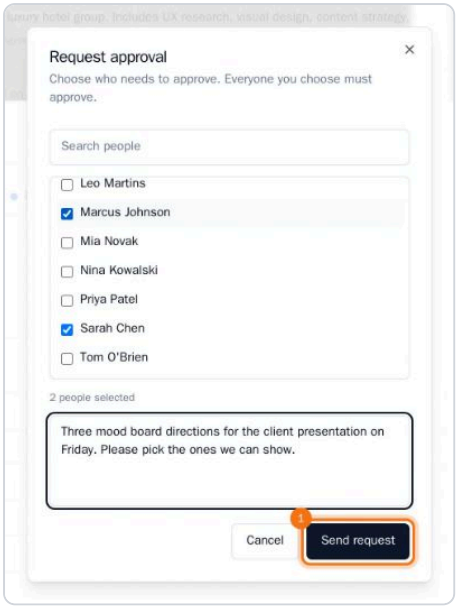
Use an approval when a task needs a sign-off before it counts as done, for example a design the creative director has to accept. Everyone you ask has to approve, and only they can decide.

Request approval

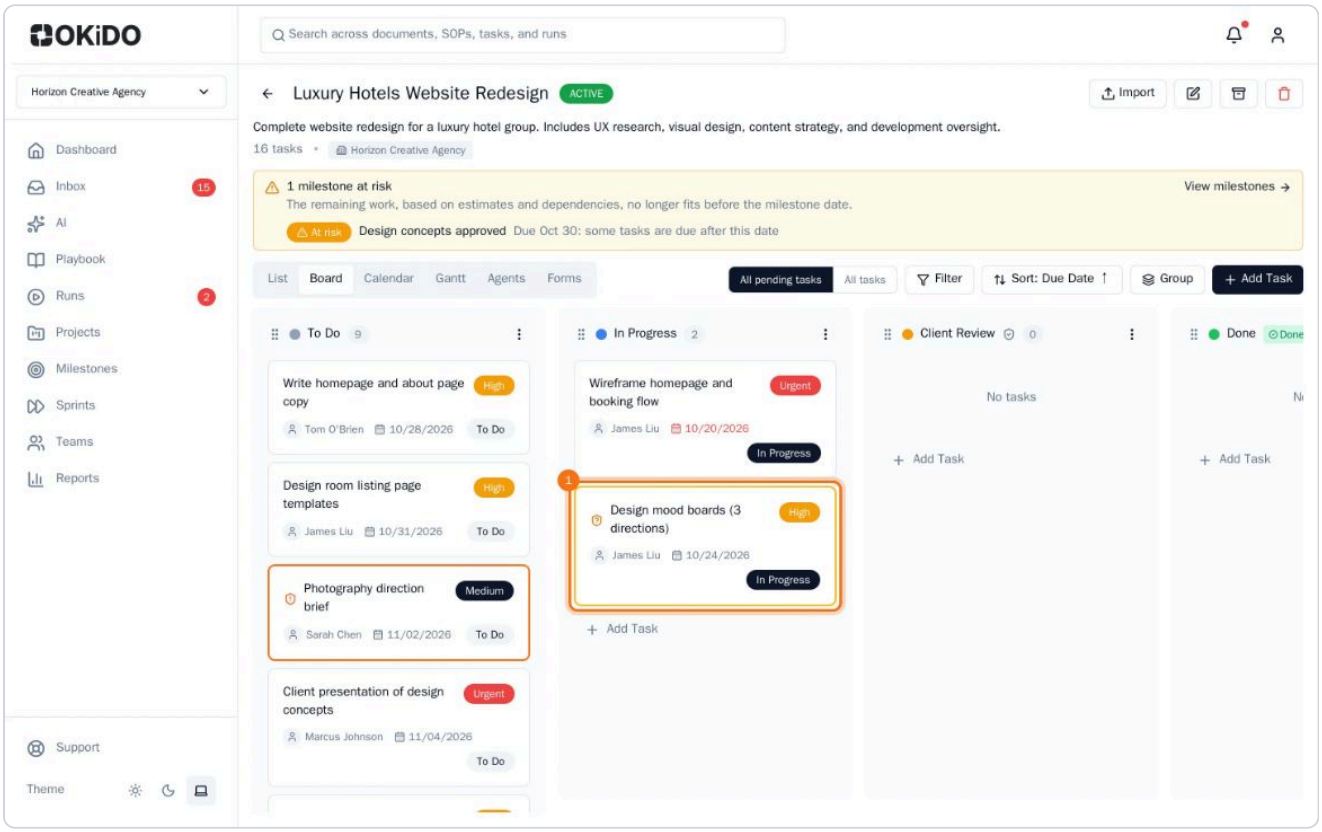
1. Open the task, choose **More actions** (the three dots at the top), then **Create approval request**.



2. Select the people who should approve and add a note for them if you like.
3. Choose **Send request**.

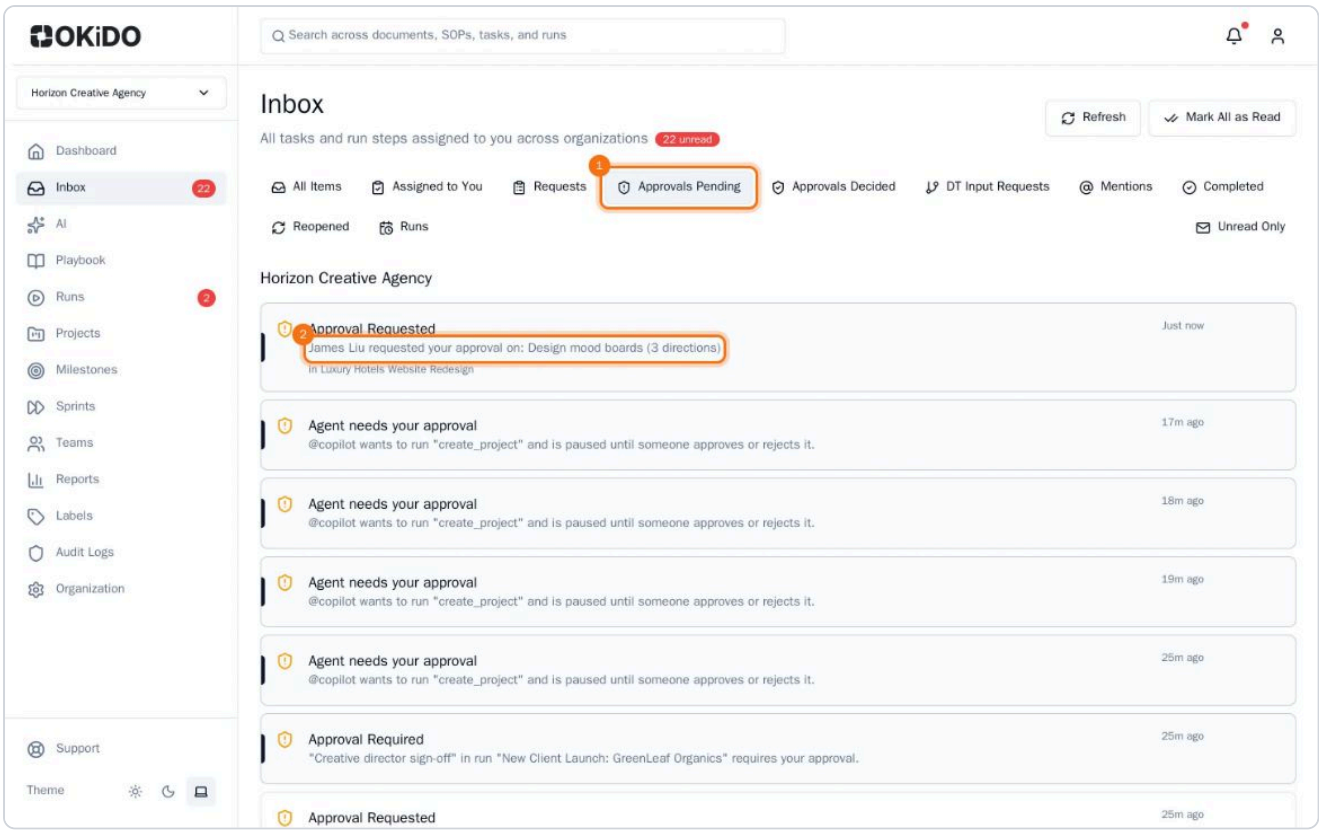


The task now waits for approval. On the board it gets an amber border and an icon that shows who still has to approve. The task keeps its assignee.

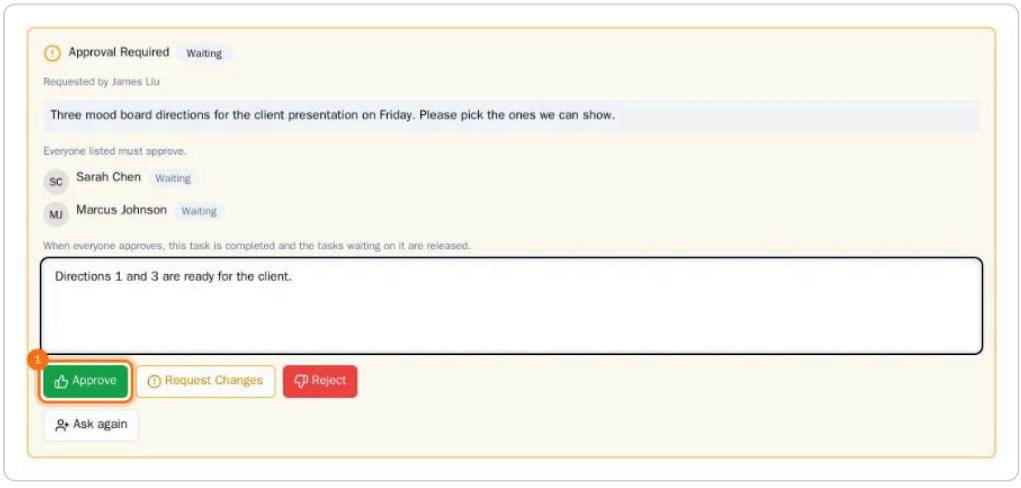


Approve, reject or request changes

The people you asked find the request in their **Inbox**, under **Approvals Pending**.



1. Open the task from the inbox.
2. Add a note if you like, then choose **Approve**, **Request Changes** or **Reject**.



When the last person approves, the task completes on its own. One rejection decides the task, even while others have not answered yet.



Tip: Made a mistake? Choose **Change my decision** in the task to answer again. After changes, the person who asked can choose **Ask again** to start a new round.

Make a task repeat

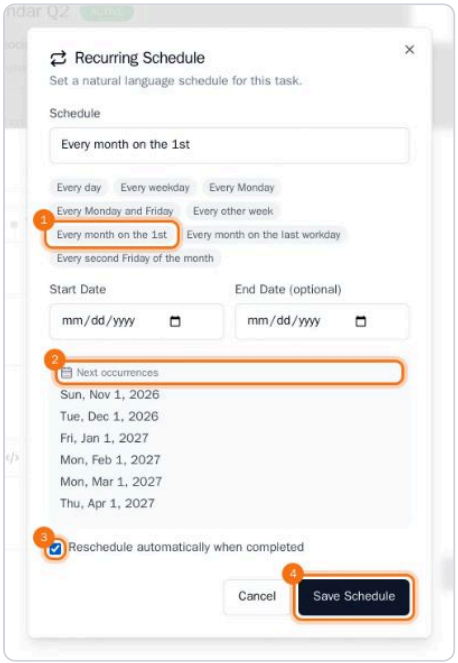
Give a task a schedule, so that it comes back by itself with the next date each time you complete it.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

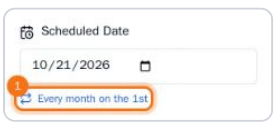
Work that comes back every week or every month, such as a monthly report, needs only one task. Give it a schedule: each time you complete it, it reopens with the next date on the schedule.

Set a schedule

1. Open the task, choose **More actions** (the three dots at the top), then **Make recurring**.
2. Under **Schedule**, describe when the task comes back, for example `Every month on the 1st`, or click one of the suggestions below the box. Write the schedule in English, like the suggestions.
3. If the schedule should only start later or end on a date, fill in the **Start Date** and the end date.
4. Check the dates under **Next occurrences**.
5. Tick **Reschedule automatically when completed**: this is what brings the task back. Then choose **Save Schedule**.



The schedule now shows under **Scheduled Date** in the task.



Complete a repeating task

Mark the task as done when the work is finished. It comes straight back with the status **To Do**, and its scheduled date moves to the next date on the schedule.

Change or stop the schedule

Click the schedule under **Scheduled Date**, or choose **Edit recurring schedule** in the task menu. Change the schedule and save it, or choose **Remove** to stop the task from repeating.

Track time on a task

Estimate a task, log time with one click or your own entry, and run the timer while you work.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

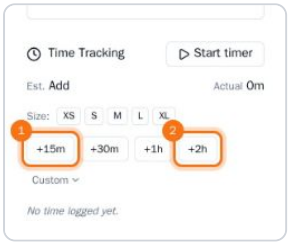
Write down how long a task should take and how long it really took. Log time afterwards with one click, or let the timer run while you work.

Estimate the task

1. Open the task. **Time Tracking** is in the panel on the right.
2. Click **Est.**, type the estimate in minutes and choose **Save estimate** (the check mark).

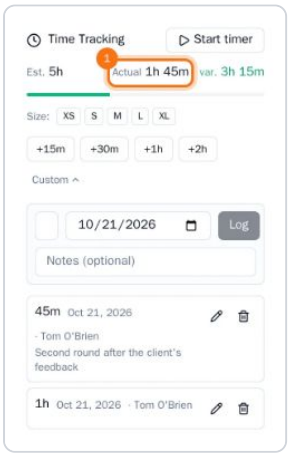
Log time

Choose one of the quick buttons (15 minutes, 30 minutes, 1 hour or 2 hours) to log that time for today.



For any other amount, choose **Custom**, type the minutes, change the date if the work was on another day, add a note if you like and choose **Log**.

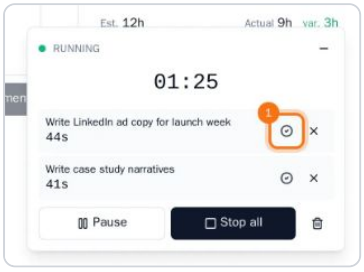
Every entry is listed with who logged it and when. **Actual** adds them up and shows the difference from the estimate. The bar under it turns amber when you get close to the estimate and red when you go over.



To correct an entry, choose **Edit entry** or **Delete entry** next to it.

Run the timer

1. Choose **Start timer**. The timer appears at the bottom right and keeps running while you move around OKiDO.
2. Working on several tasks at once? Open another task and choose **Add to timer**. The time is shared equally between the tasks on the timer.
3. When you finish a task, choose **Stop and log this task** (the check mark next to it) to log its time. The other tasks keep running.



4. To finish everything, choose **Stop all**. Check the minutes for each task, add notes or mark time as billable, then choose **Confirm & log**.

Choose **Pause** for a break. The minus sign at the top tucks the timer away in the header, where you can open it again.

Move a task to another project or organization

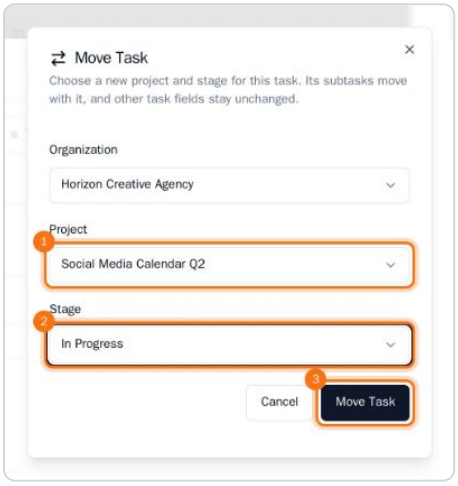
Move a task and its subtasks to another project, column or organization, and see who would lose access before you do.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Added a task to the wrong project, or does the work belong somewhere else now? Move it. Its subtasks go with it.

Move a task to another project

1. Open the task, choose **More actions** (the three dots at the top), then **Move task**.
2. Under **Project**, choose the project the task moves to.
3. Under **Stage**, choose the column it goes into.
4. Choose **Move Task**.

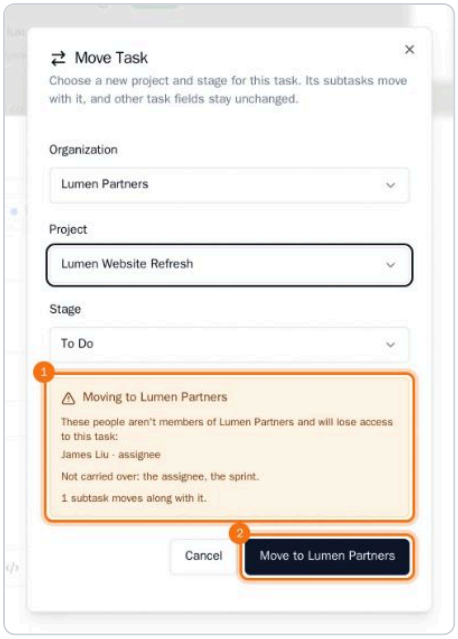


The task and its subtasks are now in the other project, in the column you chose. Everything else about the task stays the same. If the column has rules the task does not meet, OKiDO tells you what is missing and the task stays where it was.

Move a task to another organization

When you belong to more than one organization, the dialog also asks for the **Organization**.

1. Under **Organization**, choose the other organization, then the project and the column.
2. Read the warning before you move. It names everyone involved in the task who is not a member of the other organization: they lose access to the task. It also lists what stays behind, such as the assignee, the sprint and the labels, because they belong to this organization.
3. Choose the move button, which names the other organization.



The task leaves this organization. Switch to the other organization to find it in its new project.

Hand a task to an AI agent

Assign a task to an AI agent or @mention one in a comment, then follow its runs, results and approvals on the task.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Your organization's AI agents can take on tasks the way a colleague does: a copywriting agent drafts the emails, a QA agent checks a deliverable. Assign the task to the agent, or mention the agent in a comment, and follow what it does on the task itself. Everyone in the organization can hand tasks to agents.

Assign a task to an agent

1. Open the task.
2. Choose the **Assign To** field on the right and pick an agent under **AI Agents**. Type part of its name to find it faster.



The agent starts at once. Below the field you see what it is doing: queued, working and for how long, and when it is done. When it finishes, its reply appears in the task's comments, and the files it made are saved on the task.

An agent can stop and wait for a person's approval, for example before it sends something outside OKiDO. The line below the field then says it needs approval.

Mention an agent in a comment

In a comment, type **@** and the first letters of the agent's name, choose the agent and add the comment. The agent reads the comment and replies in the comments, the same way as when you assign it the task. See Comment, mention people and check activity.

Follow the AI work on a task

1. Open the task and choose the **AI work** tab. The number on the tab shows how many runs and files there are.

Each run shows its status, the agent, when it ran and who asked. Below a run you see the actions that needed approval, with who approved or rejected them and when, and the files the agent made. Choose **Open run** to see the whole run under **AI**, and a file's name to open it.



Opening runs and files needs the Advanced AI features: owners and admins have them, and members get them from an owner or admin (see Change a member's role or Advanced AI access).

CHAPTER 5

Approvals and request forms

Follow up on an approval you asked for

Create a request form

Share a request form with people outside your organization

Send a request through a form

Handle incoming requests

Read this chapter online

okido.io/en/docs/approvals-forms

Scan the code or open the link to read this chapter online, where it is always up to date.

Follow up on an approval you asked for

See who still has to decide, get notified when the approval is decided and ask again after you have made changes.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

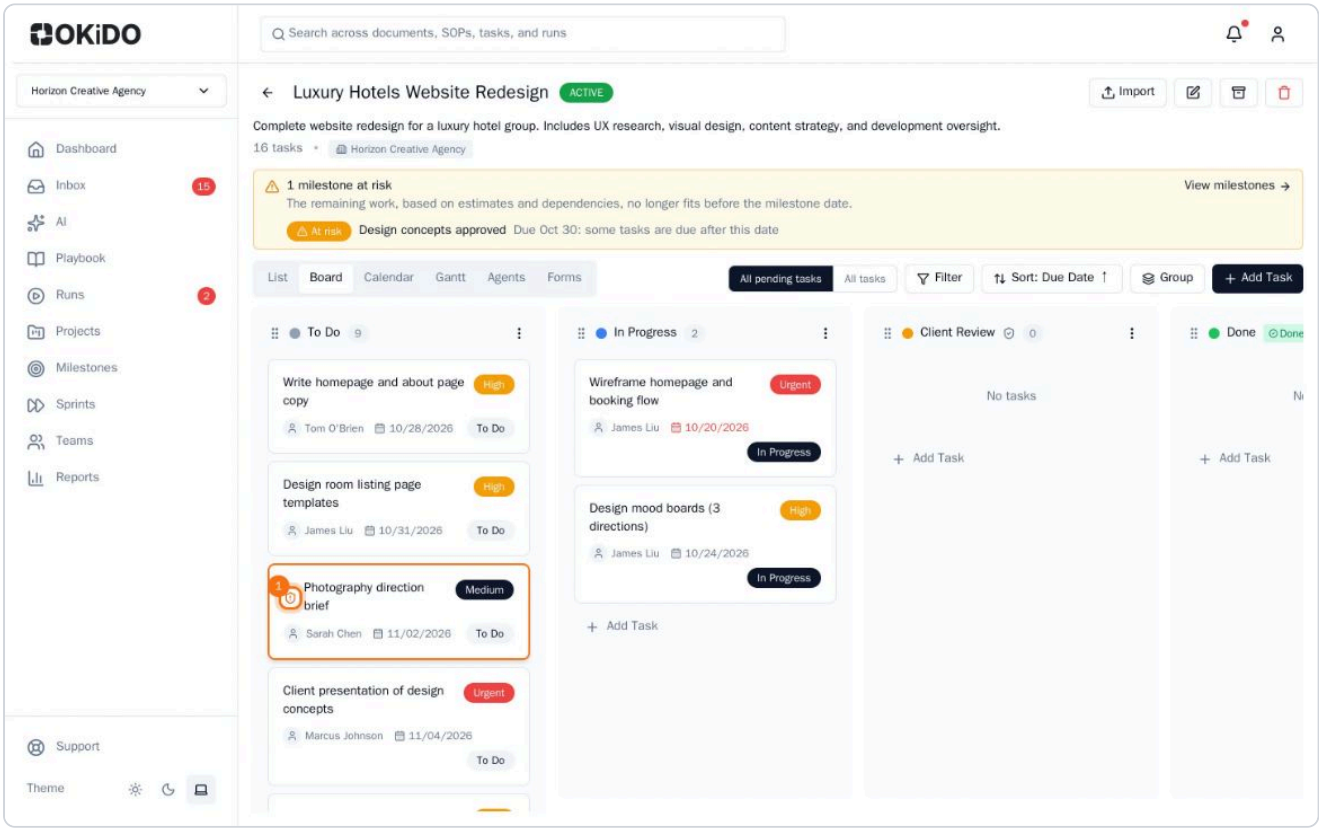
Once you have asked people to approve a task, the task shows where things stand: who has approved, who still has to decide and what someone asked you to change. OKiDO tells you when the approval is decided, and after you have made the changes you can ask again. To ask for an approval in the first place, see Request an approval.

See who still has to decide

On the board, a task that waits for approval has a colored border and a shield icon in front of its title:

- **Amber:** people still have to decide.
- **Orange:** someone requested changes.
- **Red:** someone rejected it.

When everyone has approved, the border goes back to normal and a green check shows in front of the title. Point at the icon to see the names, for example who requested changes.



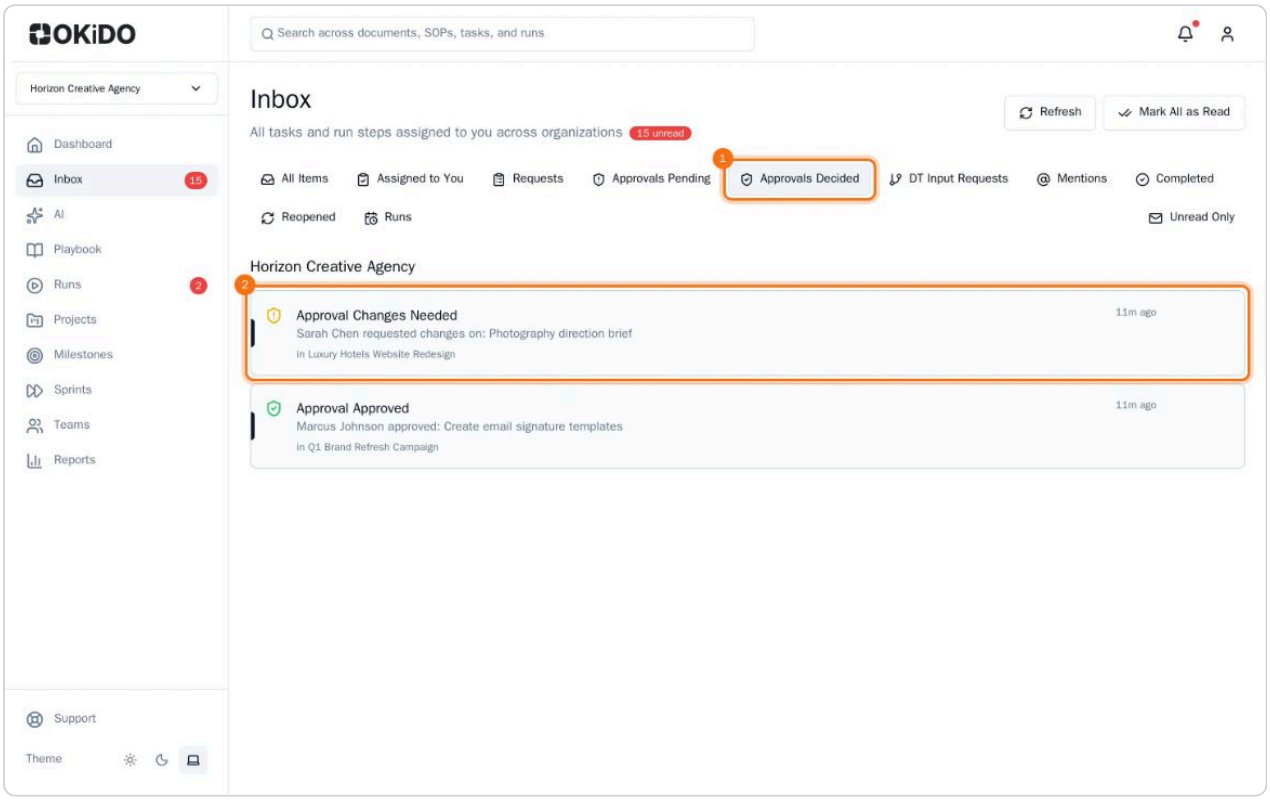
Open the task for the details. The **Approval Required** panel lists everyone you asked, with their decision (**Waiting**, **Approved**, **Changes requested** or **Rejected**), the date they decided and the

note they left.

Get notified when it is decided

You get a notification as soon as the approval is decided: when the last person approves, or as soon as one person requests changes or rejects it. The person the task is assigned to gets one too. An approval while others still have to decide shows in the task, without a notification.

1. Choose **Inbox** in the sidebar.
2. Choose **Approvals Decided**.



3. Choose a notification to open its task.

When everyone has approved, the task is completed on its own and the tasks waiting for it can start.

Ask again after changes

1. Make the changes, then open the task.
2. In the **Approval Required** panel, choose **Ask again**.



3. The people you asked last time are already selected. Clear anyone who does not need to look again, select anyone else who should, and add a note about what you changed.
4. Choose **Send request**.

Everyone you selected has to decide again, including the people who approved before. They get a new request in their inbox, and the task waits for approval again. People you cleared are no longer asked.

Only the person who asked for the approval, or an organization owner or admin, can ask again.

Create a request form

Build a form whose answers become tasks in a project, with the labels, column, assignee and priority you choose.

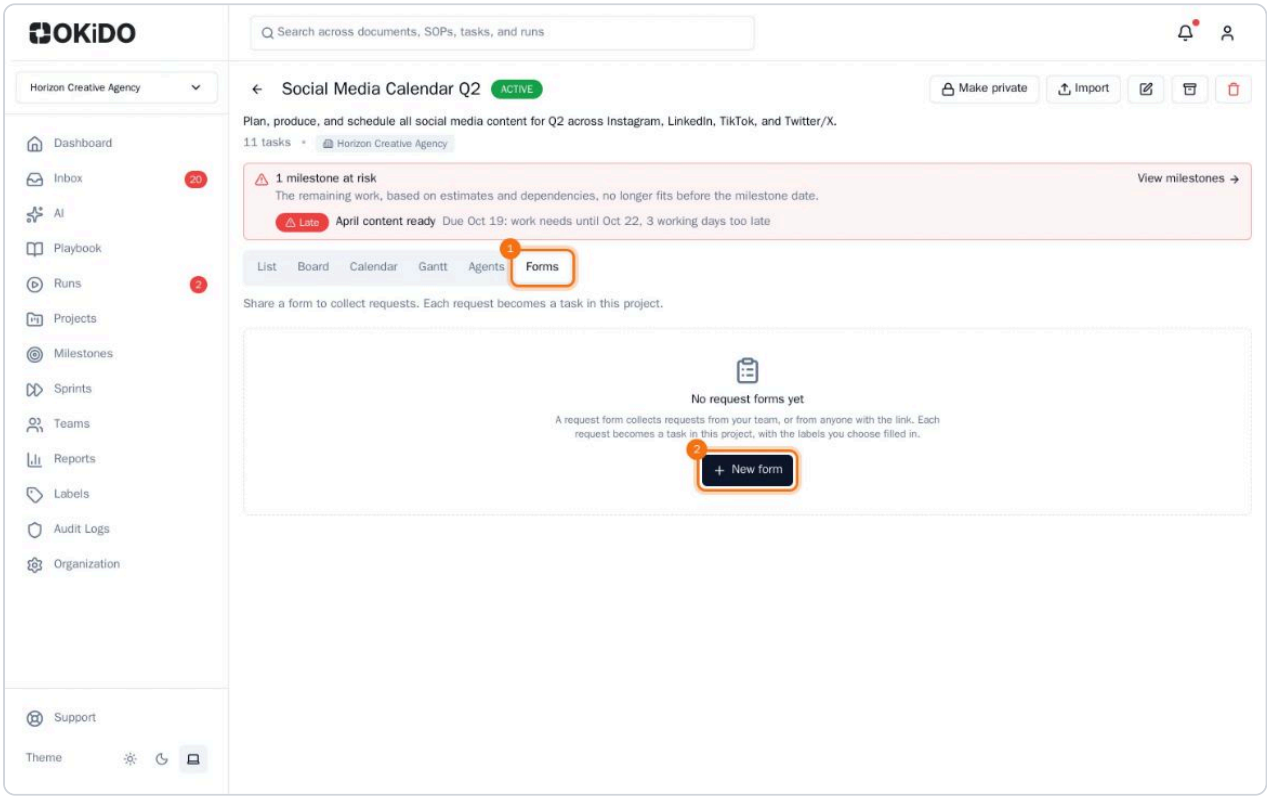
Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

A request form collects requests in one shape, so nobody has to chase the details later. Each request someone sends becomes a task in your project, with the fields of the smart labels you chose already filled in. The Design label, for example, asks for the format, the size and the deadline.

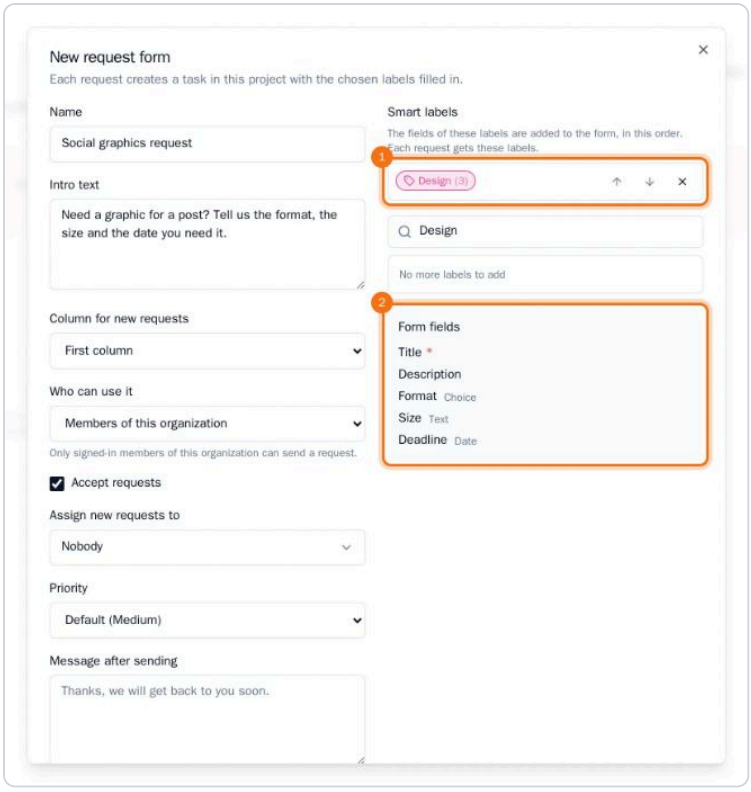
Organization owners and admins can create request forms in every project. Members can create them in the projects they created themselves.

Create the form

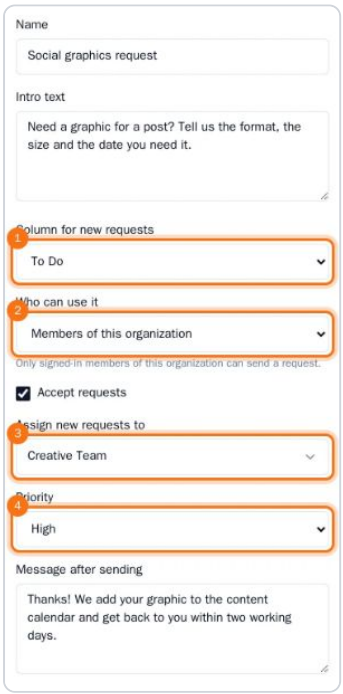
1. Open the project and choose the **Forms** tab.



2. Choose **New form**.
3. Give the form a **Name** and, if you like, an **Intro text**. The intro text is shown above the form.
4. Under **Smart labels**, search for a label and click it to add it. Its fields are added to the form, and every request gets the label.



5. Set what happens with each new request:
   - **Column for new requests**: the board column the new task goes to.
   - **Who can use it**: **Members of this organization**, or **Anyone with the link** to share the form outside your organization.
   - **Assign new requests to**: a person or a team.
   - **Priority**: the priority the new task gets.
   - **Message after sending**: what people read after sending.



6. Choose **Create**.

The form is now on the **Forms** tab, with the column its requests go to and who gets them. **Copy internal link** copies the link to share with your colleagues. On the board, the form also shows as a button under its column, so anyone in the project can fill it in from there.

The form always asks for a title and a description first, then the fields of each label, in the order of the labels. Use the arrows next to a label to change the order. File fields are not asked on a form.

Change a form

On the **Forms** tab, choose the pencil next to the form, change what you need and choose **Save**. Clear **Accept requests** to stop taking requests for a while.

Next: Send a request through a form and Share a request form with people outside your organization.

Share a request form with people outside your organization

Open a request form to anyone with the link, so customers can send requests without signing in.

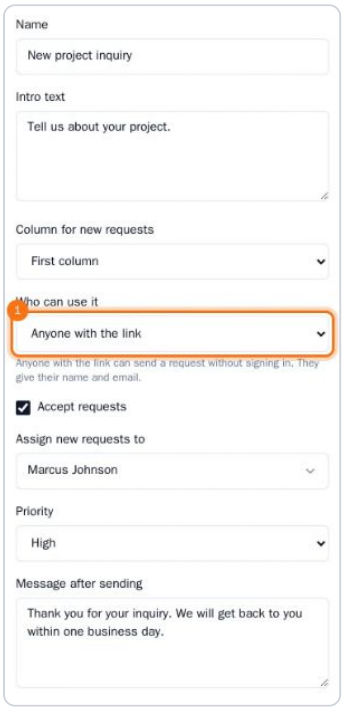
Available on: Starter · Pro · Business | Who can do this: Owner, Admin

A public request form lets customers and other people outside your organization send you a request without an account. Put the link on your website or in an email, and every request lands as a task in your project, with the sender's name and email.

Only organization owners and admins can make a form public, on a paid plan.

Make the form public

1. Open the project, choose the **Forms** tab and choose the pencil next to the form.
2. Under **Who can use it**, choose **Anyone with the link**.

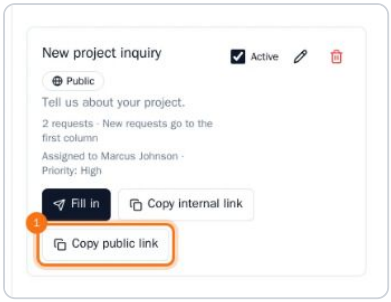


3. Choose **Save**.

The form now has the **Public** badge. To make it internal again, choose **Members of this organization** in the same place. The public link then stops working.

Share the link

1. Choose **Copy public link** on the form.

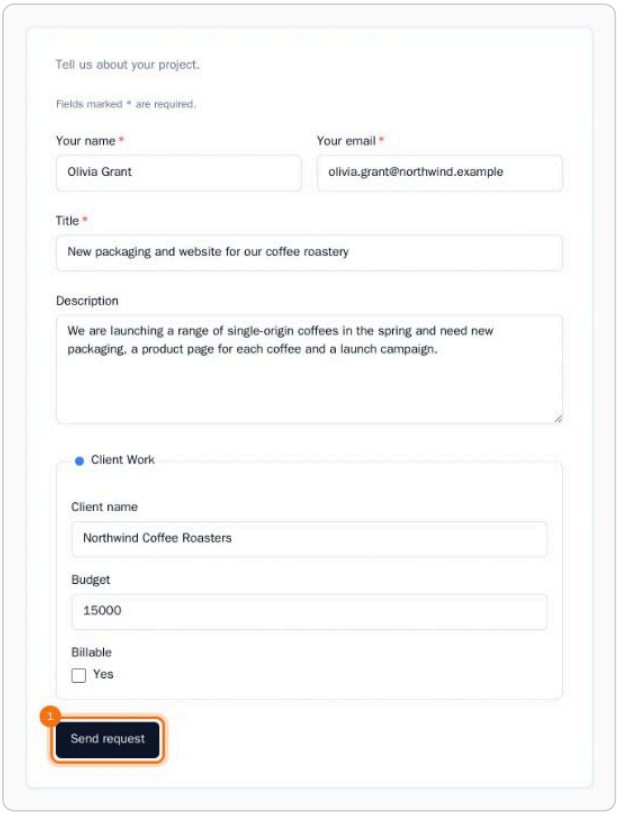


2. Paste the link where your customers find it, for example on your website or in an email.

Copy internal link is for your colleagues: it opens the form inside OKiDO, for people who are signed in.

What your customers see

The link opens the form on its own page, without signing in. It shows the form's intro text and asks for the sender's name and email, a title, a description and the fields of the form's labels.



When they choose **Send request**, they see the form's message after sending, and OKiDO creates the task in your project. The task shows who sent it, with their email address, so you can reply. The person who made the form and the project's owner get a notification in their inbox.

> **Tip:** Clear **Accept requests** on the form to stop taking requests for a while. The link stays the same, and people who open it read that the form is closed.

Send a request through a form

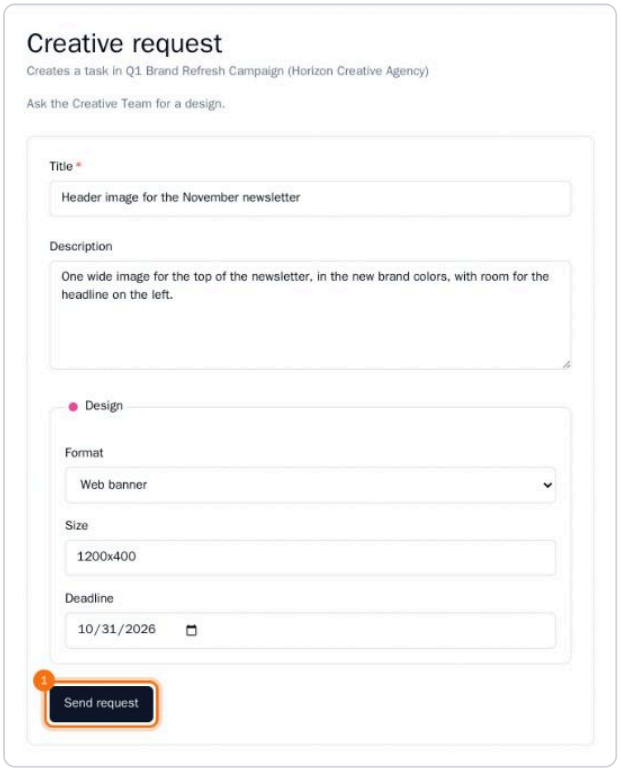
Fill in a colleague's request form from its link or from a board column, then open the task it creates.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

When a team takes work in through a request form, use the form instead of a message or a hallway chat. The form asks for everything the team needs, and your request becomes a task on their board that you can follow.

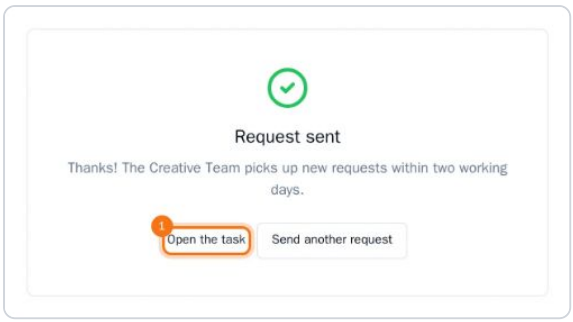
Fill in a form from its link

1. Open the link a colleague shared with you. You need to be signed in to OKiDO.
2. Enter a **Title** and, if you like, a **Description**.
3. Fill in the form's other fields. Fields marked with a red star are required.



4. Choose **Send request**.

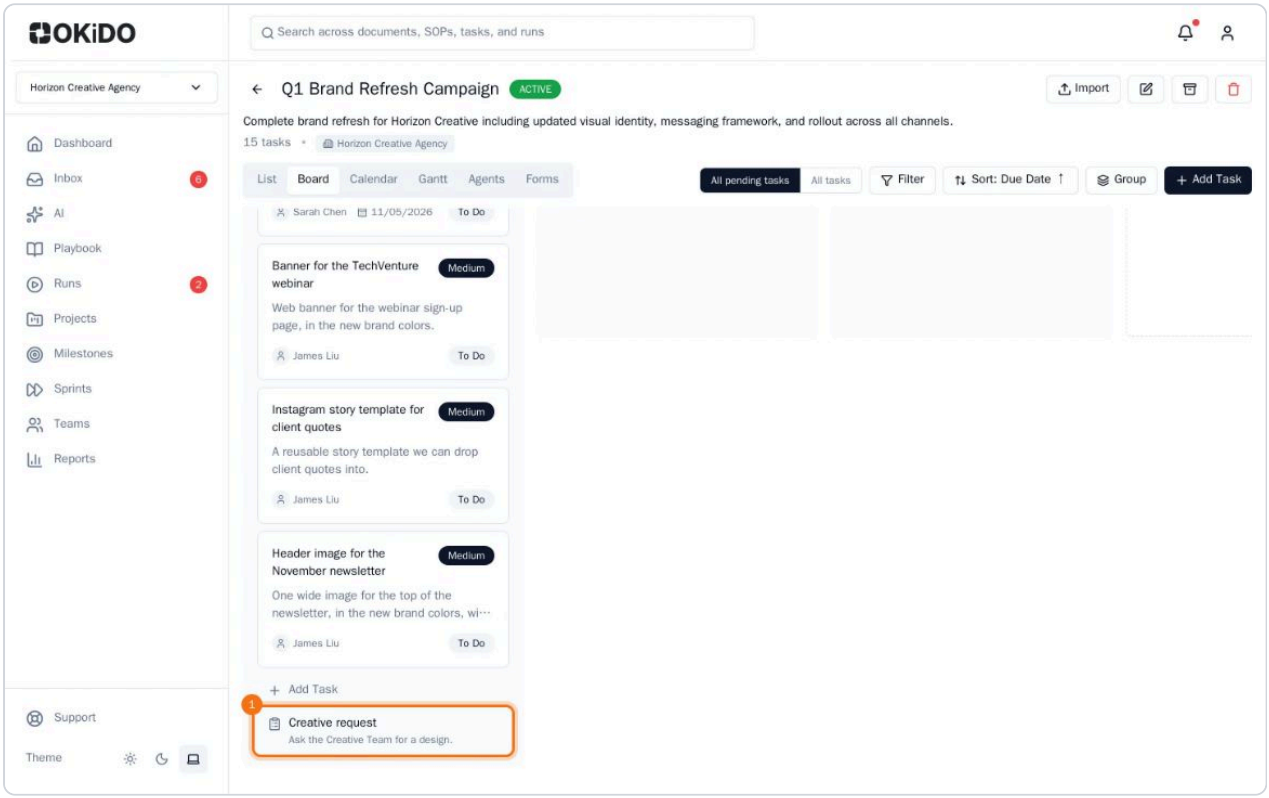
You see the form's message after sending. Choose **Open the task** to see the task your request became, or **Send another request** to send one more.



Fill in a form from the board

Every active form of a project shows as a button under the column its requests go to, below **Add Task**.

1. Open the project and find the form under its column.



2. Choose the form, fill it in and choose **Send request**.
3. Choose **Open the task** to open the new task right there.

You can also choose **Fill in** on the form in the project's **Forms** tab.

What happens next

The new task is in the form's column, with the form's labels and the values you filled in. It shows which form it came from and who sent it. If the form assigns new requests to a person or a team, they get it right away, and the person who made the form gets a notification.

Handle incoming requests

Find new requests in your inbox, see which form each came from, and pause or delete a form.

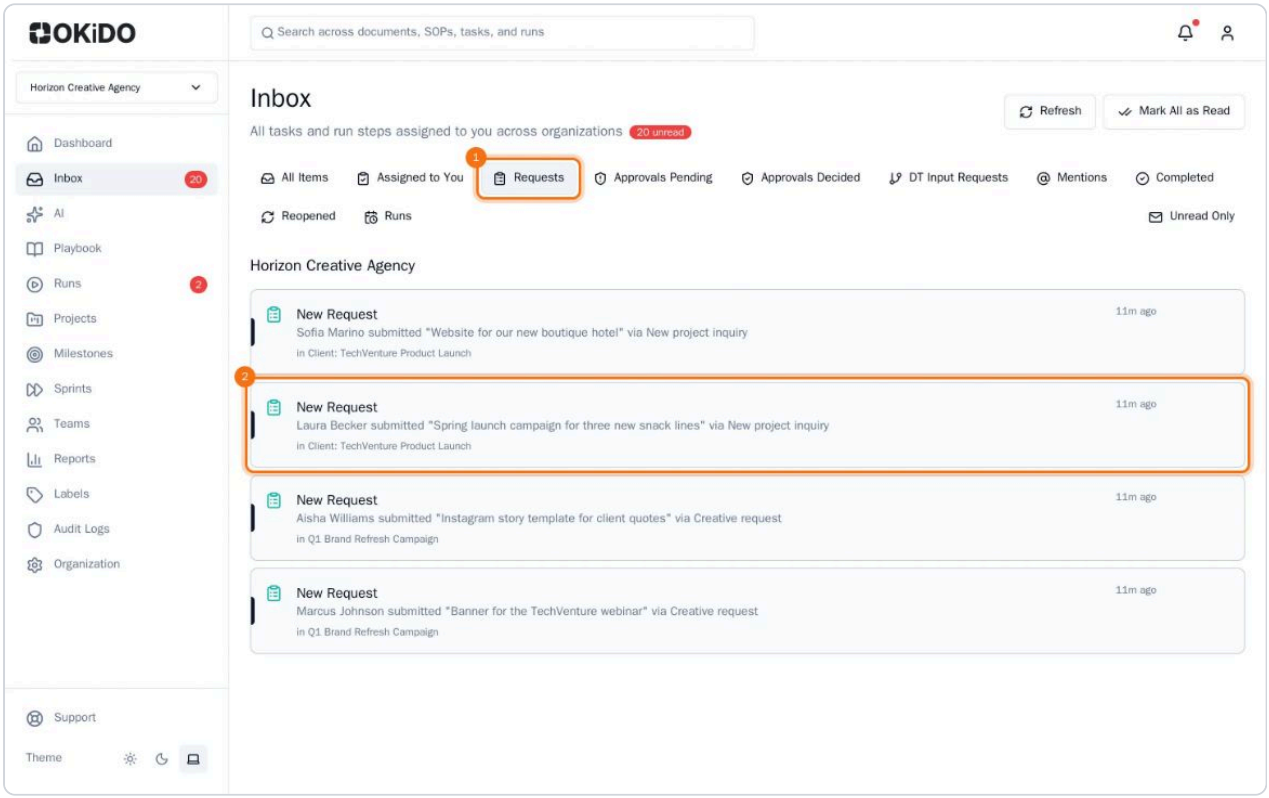
Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Each request sent through one of your forms is a task in your project, ready to plan like any other. OKiDO tells you when one comes in, and each task shows where it came from and who sent it.

Find new requests

When someone sends a request through a form, the person who made the form and the project's owner get a notification. The person the form assigns new requests to finds the task among their assigned work.

1. Choose **Inbox** in the sidebar.
2. Choose **Requests**.



3. Choose a request to open its task.

See where a request came from

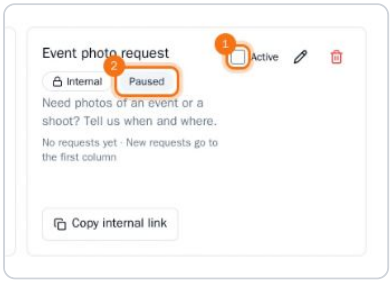
The task of a request shows the form it came from and who sent it, under its title. For a request through a public form, that is the sender's name and email address, so you can get back to them.

The values the sender filled in are in the label fields of the task. Change them like any other field, and plan, assign and move the task as usual.

Pause or delete a form

Open the project and choose the **Forms** tab. Each form shows how many requests it received.

- **Pause:** clear **Active** on the form. It gets the **Paused** badge, its button on the board disappears and people who open its link read that it is not accepting requests. Select **Active** again to reopen it.



- **Delete:** choose the trash can on the form, then **Delete form**. Its links stop working right away. The tasks it created stay in the project.

Only organization owners and admins, and the person who created the project, can pause or delete its forms.

CHAPTER 6

Planning: milestones, sprints, reports

Create a milestone

Track milestones and spot risk

Plan a sprint

Follow and close a sprint

Run a sprint meeting

Run a time report

Export a report to CSV

Read this chapter online

okido.io/en/docs/planning

Scan the code or open the link to read this chapter online, where it is always up to date.

Create a milestone

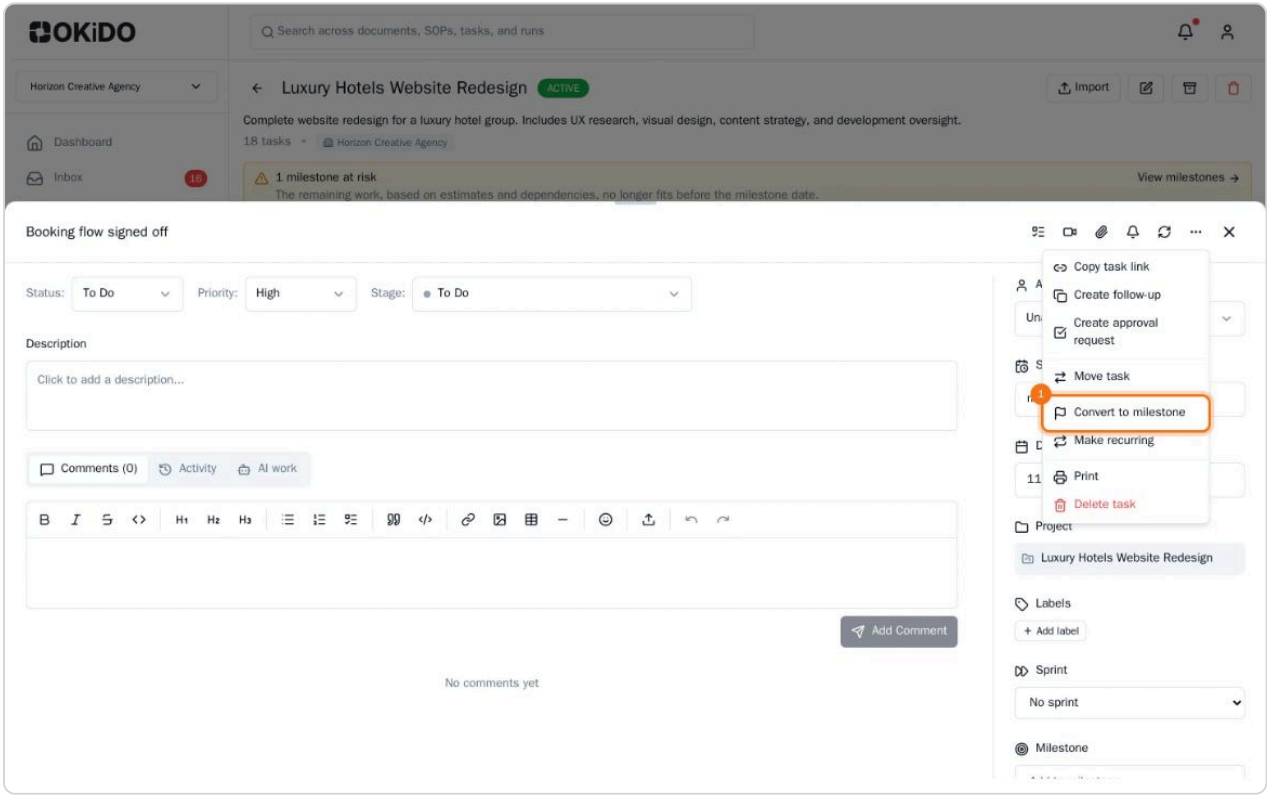
Turn a task into a milestone and link the tasks that lead up to it.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

A milestone marks a moment your project works toward, such as the client approving the designs or the website going live. Link the tasks that have to be finished first: the milestone shows how many of them are done, and OKiDO warns you when the remaining work no longer fits before its date.

Turn a task into a milestone

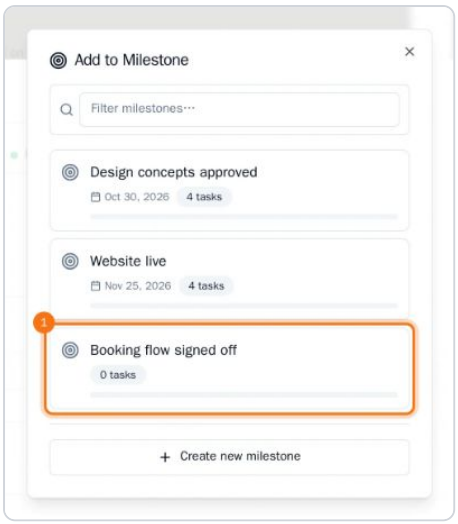
1. Open the task that stands for the moment, for example "Booking flow signed off". Give it a **Due Date**: that is the date of the milestone.
2. Choose **More actions** (the three dots at the top), then **Convert to milestone**.



The task is now a milestone. On the board it has an amber border and a target icon, and in the task a **Milestone** panel shows its progress.

Link the tasks that lead up to it

1. Open a task that has to be finished before the milestone.
2. In the panel on the right, under **Milestone**, choose **Add to milestone**.
3. Choose the milestone.

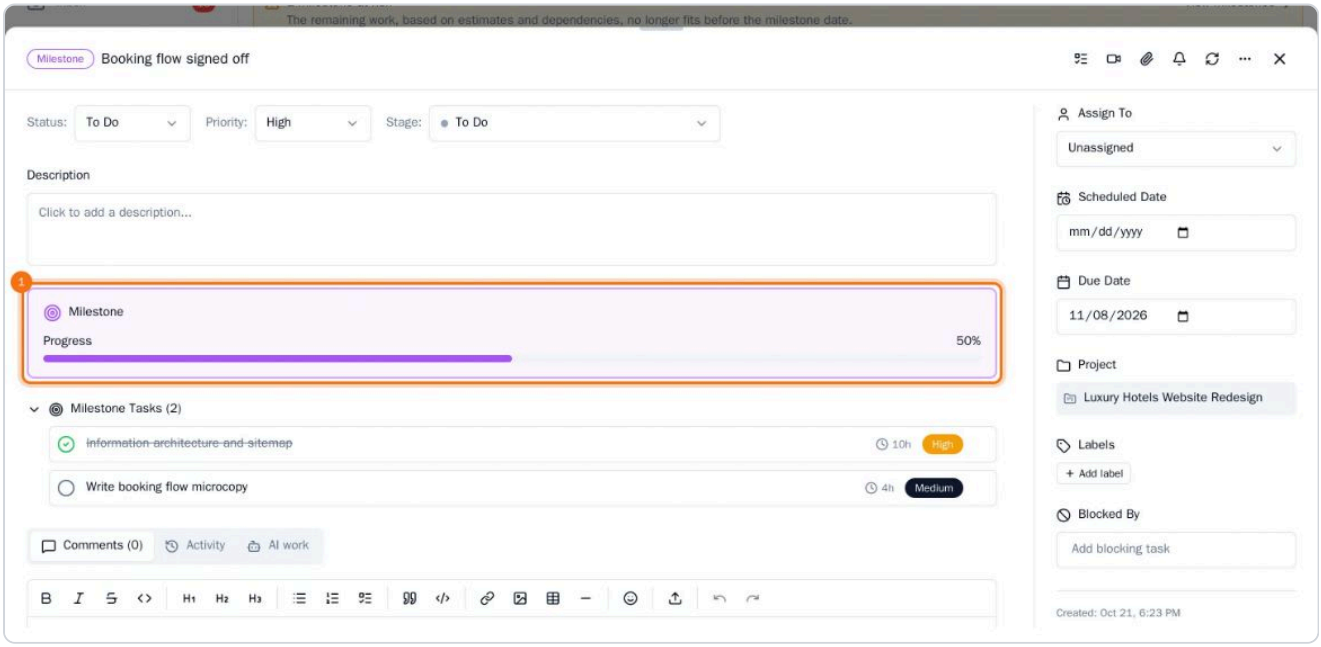


Repeat this for each task that leads up to the milestone. A task belongs to one milestone at a time. The button in the task now reads **View milestone**: choose it to link the task to another milestone, or choose **Remove from milestone** to unlink it.

> **Tip:** No milestone yet? In the same list, choose **Create new milestone**, type its name and choose **Create & Add**. OKiDO creates the milestone and links the task in one go. Give the new milestone a due date afterwards.

Follow its progress

Open the milestone. Its **Milestone** panel shows the share of its tasks that are done, with the tasks listed below it. Click a task in the list to open it.



Every milestone from all your projects is also on the **Milestones** page, with a warning when the remaining work no longer fits before its date. See Track milestones and spot risk.

Track milestones and spot risk

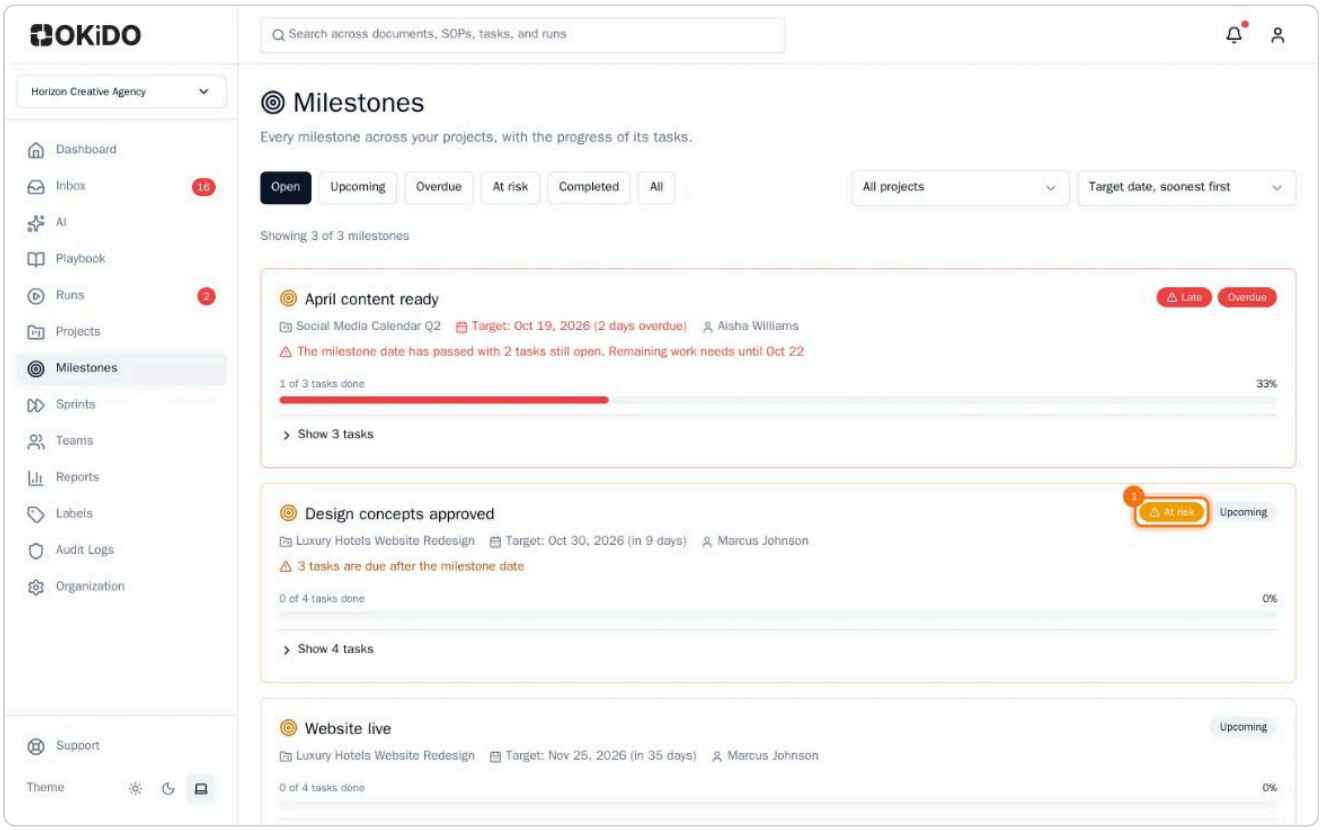
Follow every milestone's progress on the Milestones page and act on at-risk and late warnings.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

OKiDO keeps checking every open milestone against the work that still has to happen before it. When the remaining work, based on estimates and dependencies, no longer fits before the milestone's date, it warns you while there is still time to act.

See all your milestones

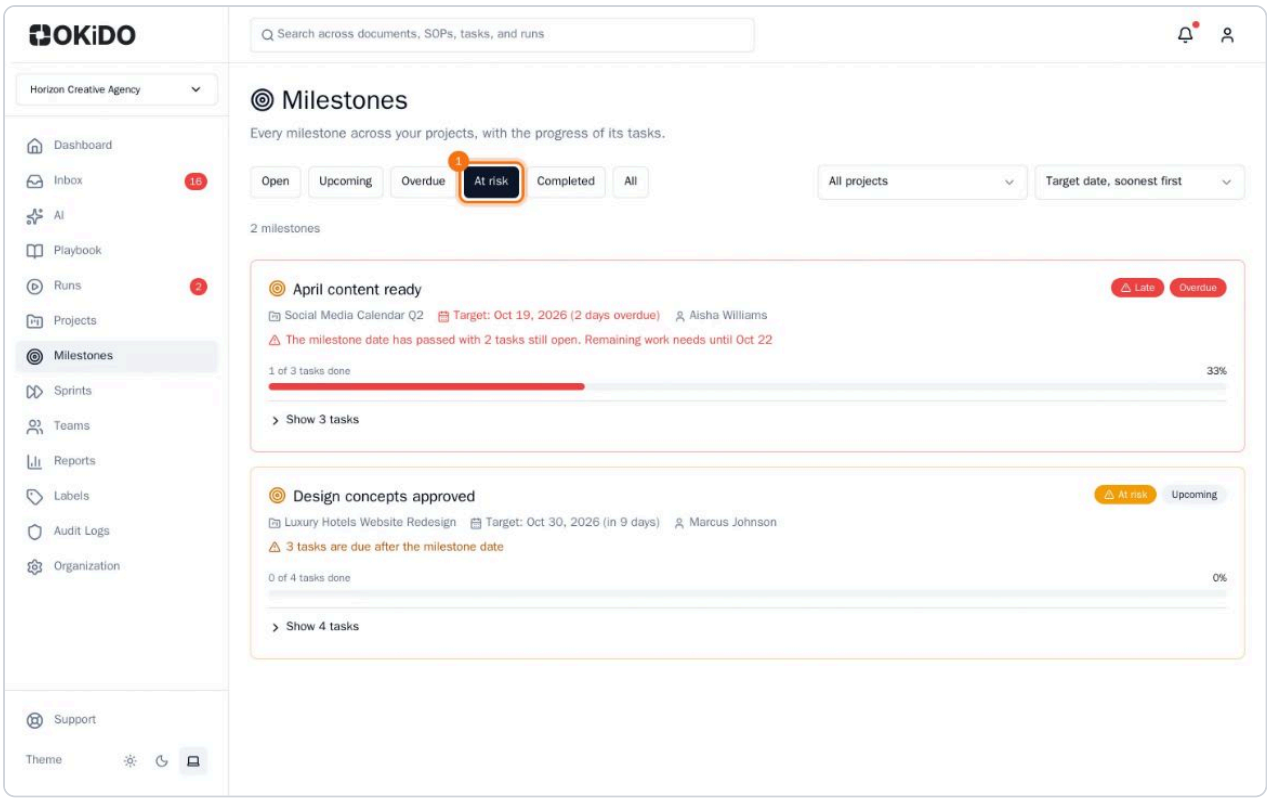
Choose **Milestones** in the sidebar.



Each milestone shows its project, its target date with the days left or overdue, the person it is assigned to and a bar with how many of its tasks are done. A milestone with a warning shows **At risk** or **Late**, with the reason. Choose the button under the bar to see its tasks, the title to open the milestone, or the project name to open the project.

Filter and sort

1. Choose a status at the top: **Open**, **Upcoming**, **Overdue**, **At risk**, **Completed** or **All**.
2. To see one project only, choose it in the list next to the statuses. The other list sorts by target date, soonest or latest first.



At risk shows both kinds of warnings: milestones at risk and late milestones.

Act on a warning

There are two warnings:

- **At risk:** the remaining work needs more working days than are left before the milestone's date, or some of its tasks are due after that date.
- **Late:** the milestone's date has passed and some of its tasks are still open.

The project shows the same warnings in a banner above its tasks. Click a milestone's name in the banner to open it, or choose **View milestones**.



To get the milestone back on track, open it and look at its tasks: move due dates that fall after the milestone, add estimates where they are missing, hand work to someone with more time, or move the milestone's own date. A task without an estimate counts as no work, so the warning also tells you how many tasks have no estimate.

OKiDO checks every milestone once an hour, and again shortly after one of its tasks changes. When a milestone becomes at risk or late, the person it is assigned to and the project's owner get a notification in their inbox.

Plan a sprint

Put tasks into a sprint from the task itself, and mark the board column that holds the sprint's work.

Available on: Pro · Business | Who can do this: Everyone in the organization

A sprint is a short, fixed stretch of work, for example two weeks. Plan it by putting the tasks your team takes on into it. Each project gets its sprints from your organization's sprint cadence; to set that up, see Set the sprint cadence.

Put a task into a sprint

1. Open the task.
2. In the panel on the right, choose a sprint under **Sprint**. The list shows the project's sprints with their dates.

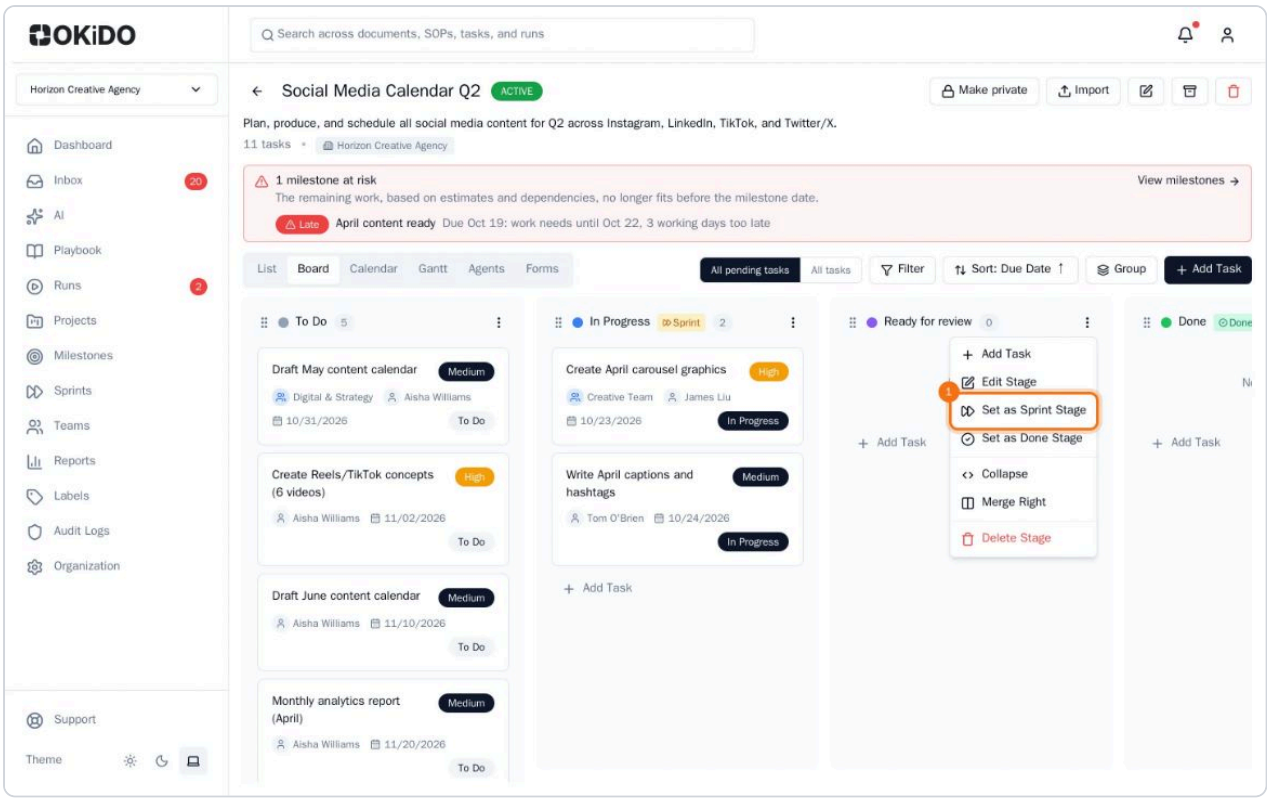


The task is now part of that sprint's work on the **Sprints** page. Choose **No sprint** to take it out again.

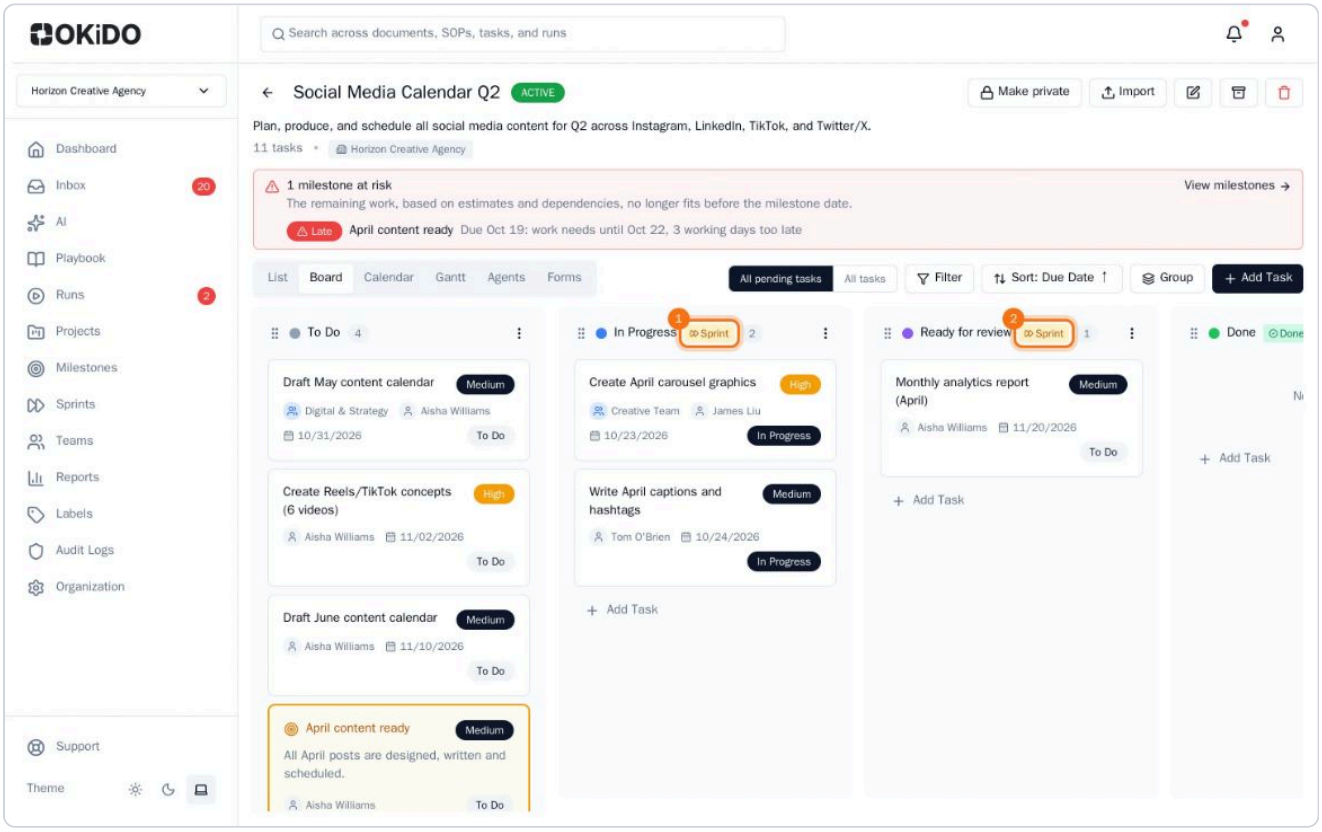
Mark the sprint column

On the board, one column can hold the work of the current sprint, for example **In Progress**. It has the **Sprint** badge. Every task that moves into that column joins the current sprint, so the sprint fills up as your team picks up work.

1. On the board, choose the menu (the three dots) at the top of the column.
2. Choose **Set as Sprint Stage**.



The column now has the **Sprint** badge, and the tasks already in it that have no sprint join the current sprint.



To undo it, choose **Remove Sprint Stage** in the same menu. The tasks keep their sprint.

Only organization owners and admins can mark a sprint column. Everyone who can edit tasks can put a task into a sprint.

Follow and close a sprint

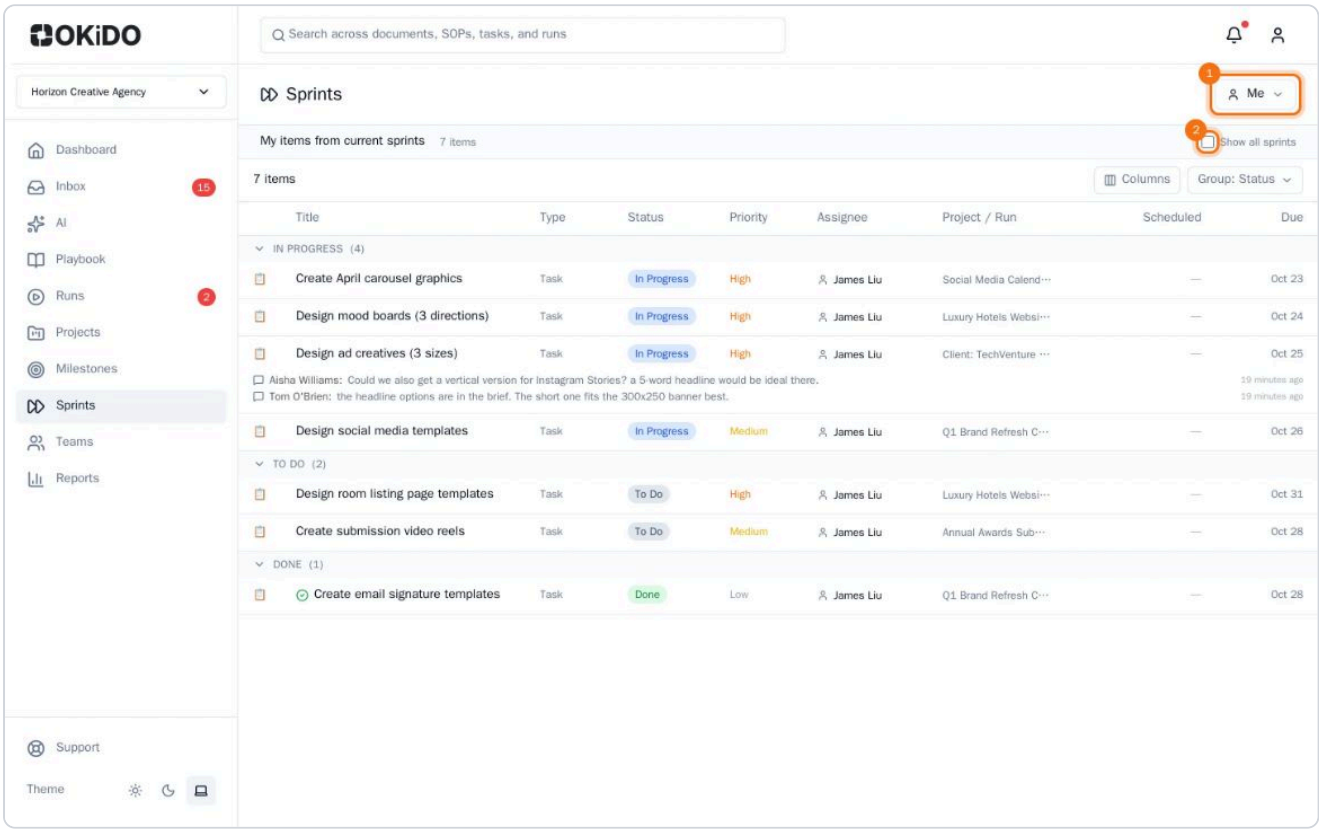
See the sprint work for you, your teams or one project or team on the Sprints page, then close the sprint and carry unfinished tasks over.

Available on: Pro · Business | Who can do this: Everyone in the organization

The **Sprints** page shows the work of the current sprints in one table: your own, your teams', or everything in the sprint of one project or team. When a sprint is over, close it there, and the tasks that are not finished move on to the next sprint.

See your sprint work

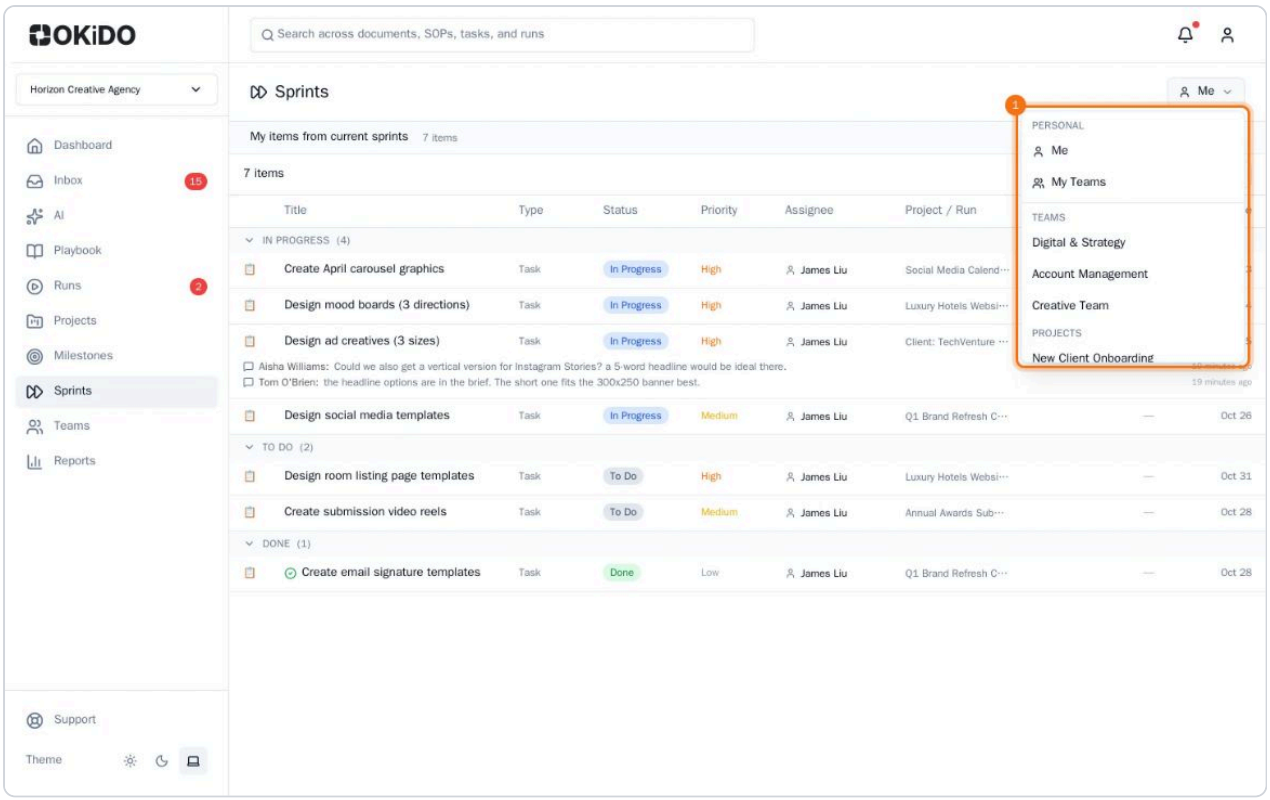
Choose **Sprints** in the sidebar. The page opens on **Me**: the tasks and run steps assigned to you in the current sprints of all your projects.



The items are grouped by status. Use the buttons above the table to group them differently or to choose the columns. Click a task to open it. Select **Show all sprints** to see your work in every sprint, not only the current ones.

Choose whose work you see

1. Choose the button at the top right that shows whose work you see.
2. Choose **Me**, **My Teams**, a team or a project.

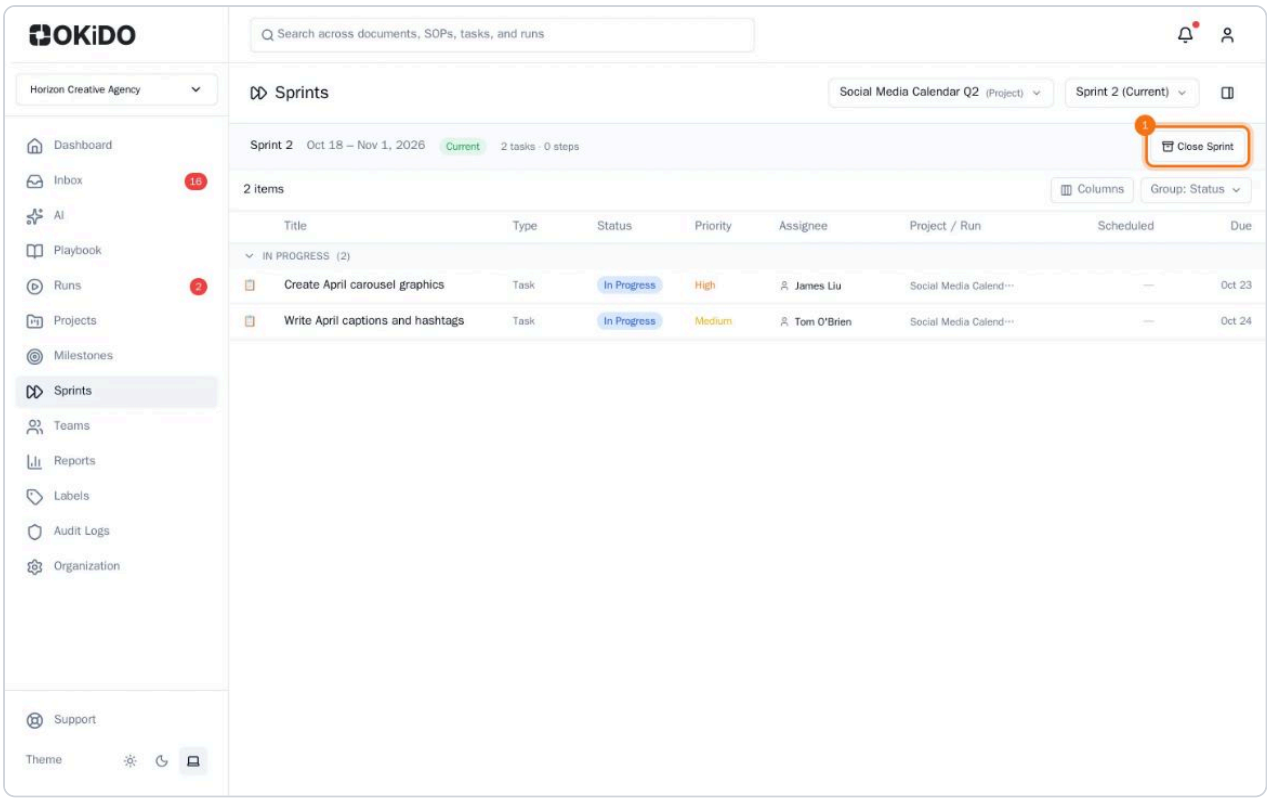


3. For a team or a project, choose a sprint in the list next to it. The sprint that runs today is chosen for you.

For a team or a project, the bar above the table shows the sprint's dates, its status and how many tasks and run steps it holds. On the right, the meeting notes of the sprint open; see Run a sprint meeting. The button with the panel icon at the top right hides them, to give the table more room.

Close a sprint

1. Choose the project or team and the sprint.
2. Choose **Close Sprint**.



OKiDO closes the sprint and moves its unfinished tasks to the next sprint of the same project or team: the first active or planned sprint that starts after this one ends. Finished tasks stay in the closed sprint, and a closed sprint can no longer be chosen in a task's **Sprint** field.

Only organization owners and admins can close a sprint.

Run a sprint meeting

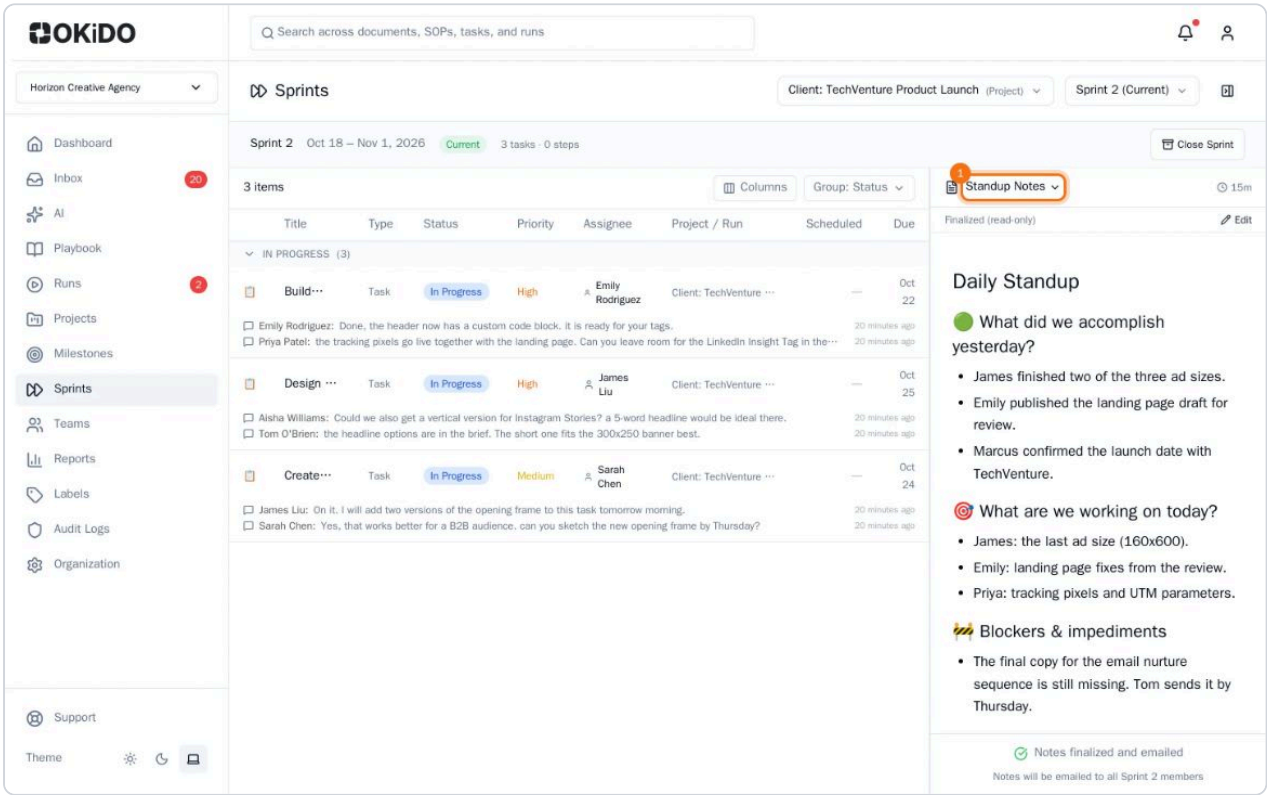
Take standup, retrospective or catchup notes, record and transcribe the meeting, and email the notes to the team.

Available on: Pro · Business | Who can do this: Everyone in the organization

Every sprint has a place for the notes of its meetings: the daily standup, the retrospective at the end and a weekly catchup. Take the notes together during the meeting, or record it and let OKiDO turn the recording into a meeting report. When the meeting is over, send the notes to the whole team.

Open the meeting notes

1. Choose **Sprints** in the sidebar.
2. Choose the project or team at the top right, then the sprint. See Follow and close a sprint.
3. The meeting notes open on the right. Choose the title of the notes to switch between **Daily Standup**, **Sprint Retrospective** and **Weekly Catchup**.

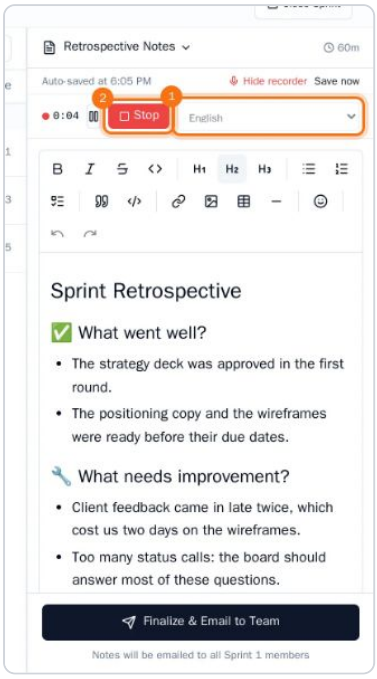


Next to the title is the planned length of the meeting. Type your notes in the editor: mention someone with @ and link a task or document with #. Notes are saved automatically every minute; choose **Save now** to save them right away. Everyone who opens the same sprint sees the same notes.

The button with the panel icon at the top right hides the notes and shows them again.

Record and transcribe the meeting

1. Choose **Record** above the notes.
2. Choose the language of the meeting, or leave **Auto-detect**.
3. Choose **Record** and allow your browser to use the microphone.



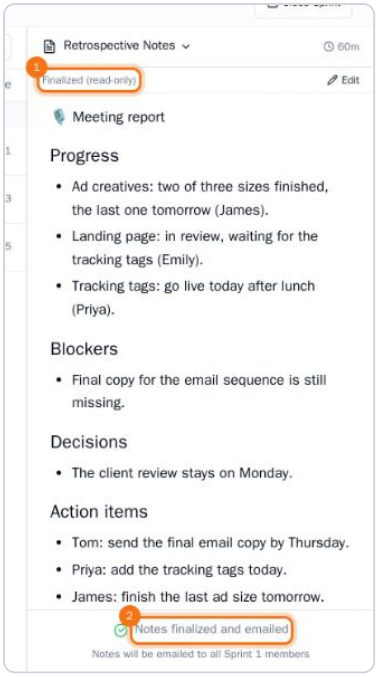
4. When the meeting is over, choose **Stop**.

OKiDO transcribes the recording and adds a meeting report to the notes, under **Meeting report**. Check it and change what you need.

While you record, the notes are read-only for everyone else. When the meeting runs longer than planned, you hear a short beep.

Send the notes to the team

1. Choose **Finalize & Email to Team** below the notes.



OKiDO emails the notes to the members of the project or team. The notes are now **Finalized (read-only)**. To change them later, choose **Edit**, then **Re-finalize & Email to Team** to send the new version.

Run a time report

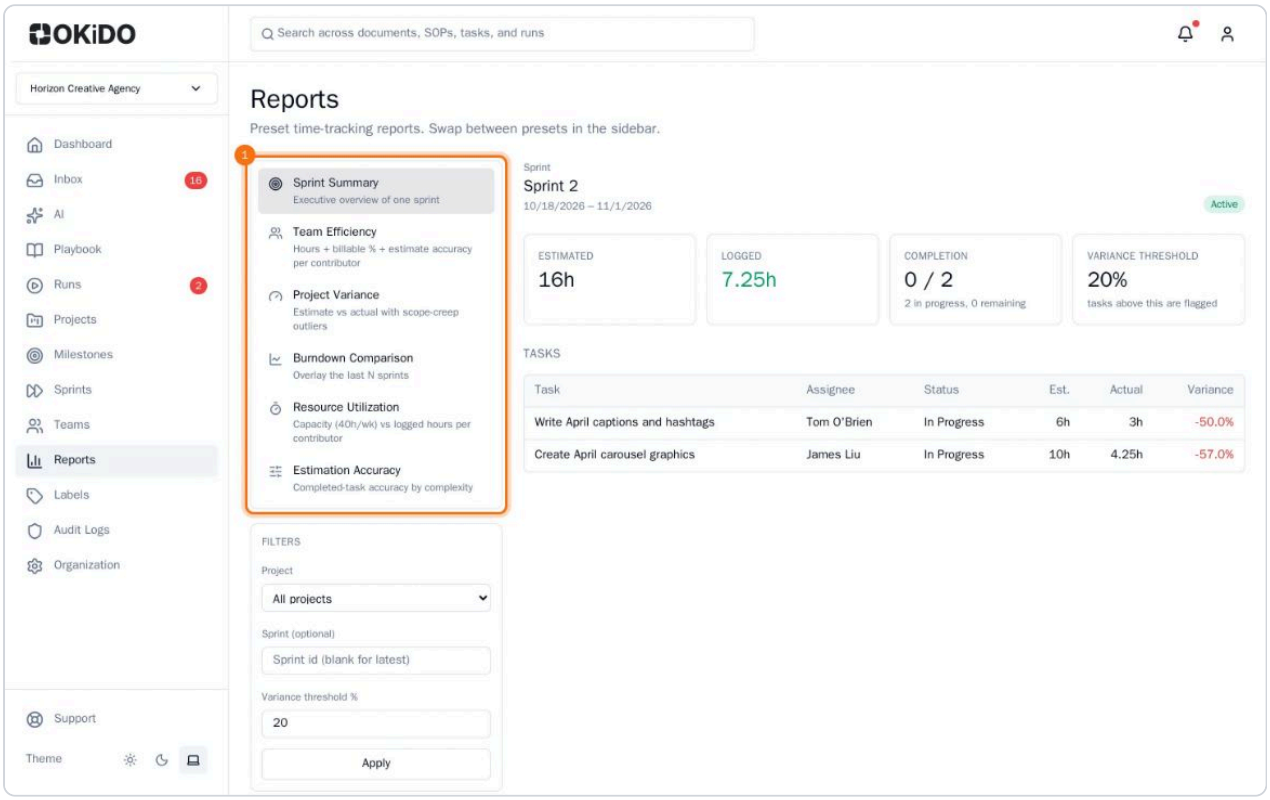
Pick one of the six time reports, set its filters and read the results.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

The **Reports** page turns the time your team logs and the estimates on your tasks into six ready-made reports. Use them to see where the hours go, how well your team estimates and whether a sprint goes to plan. The reports cover the whole team, not only your own time.

Pick a report

1. Choose **Reports** in the sidebar.
2. Choose a report on the left.



Report	What it shows
Sprint Summary	One sprint at a glance: estimated and logged hours, how many tasks are done, and each task's estimate next to the time logged on it.
Team Efficiency	Per person: hours logged, the billable share and how close their time came to the estimates.
Project Variance	Per project: estimated against actual hours, and the tasks that took more than 50% longer than estimated.

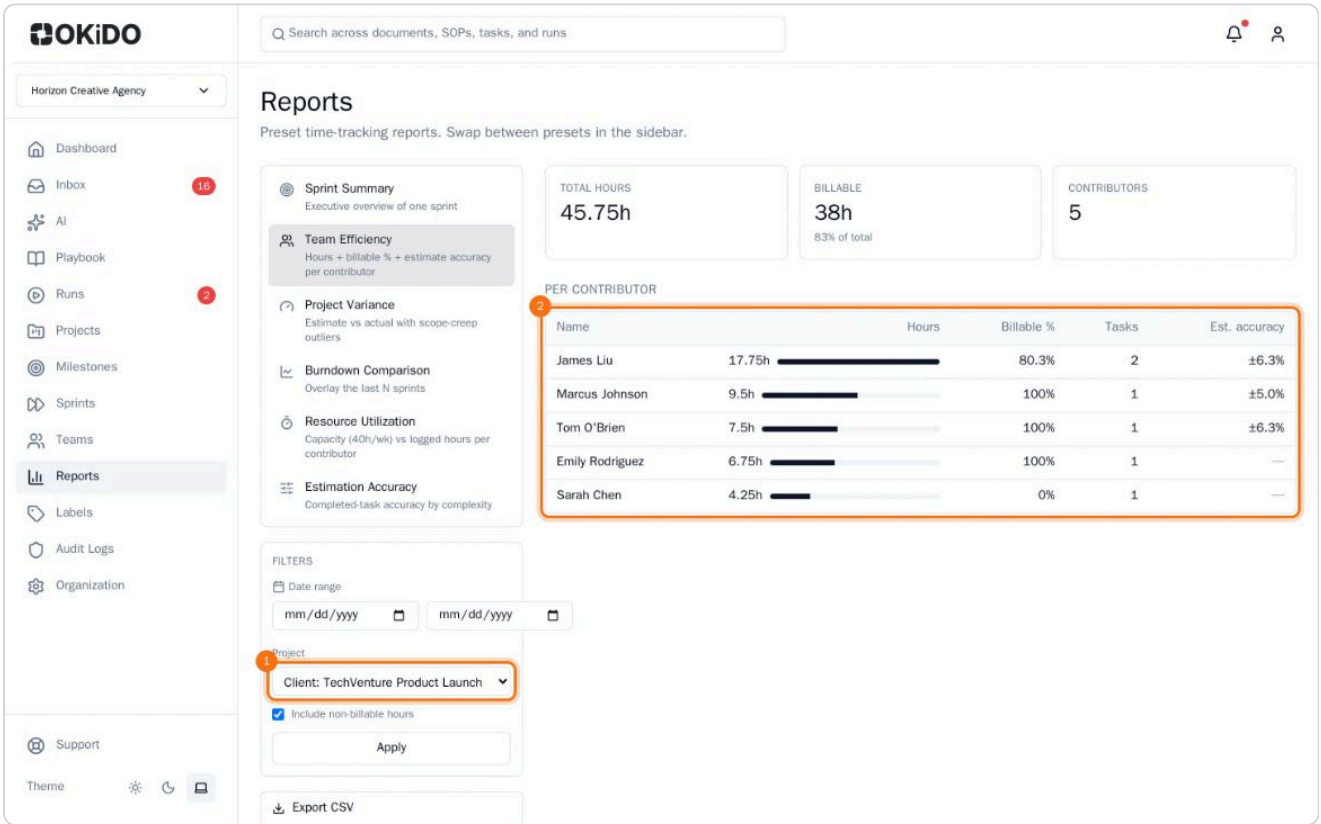
Report	What it shows
Burndown Comparison	The burndown of your last sprints in one chart, with the velocity of each sprint.
Resource Utilization	Per person: hours logged against a capacity of 40 hours a week, with who has too much or too little work.
Estimation Accuracy	How close finished tasks came to their estimate, by task size, and whether your team tends to estimate too high or too low.

Set the filters

Under the reports, each report shows only the filters it uses:

- **Date range**: the first and last day to include.
- **Project**: one project, or **All projects**.
- **Sprints to compare**: how many recent sprints the burndown compares, up to 10.
- **Variance threshold %**: how far a task may be off its estimate before it is flagged.
- **Include non-billable hours**: clear it to count billable hours only.

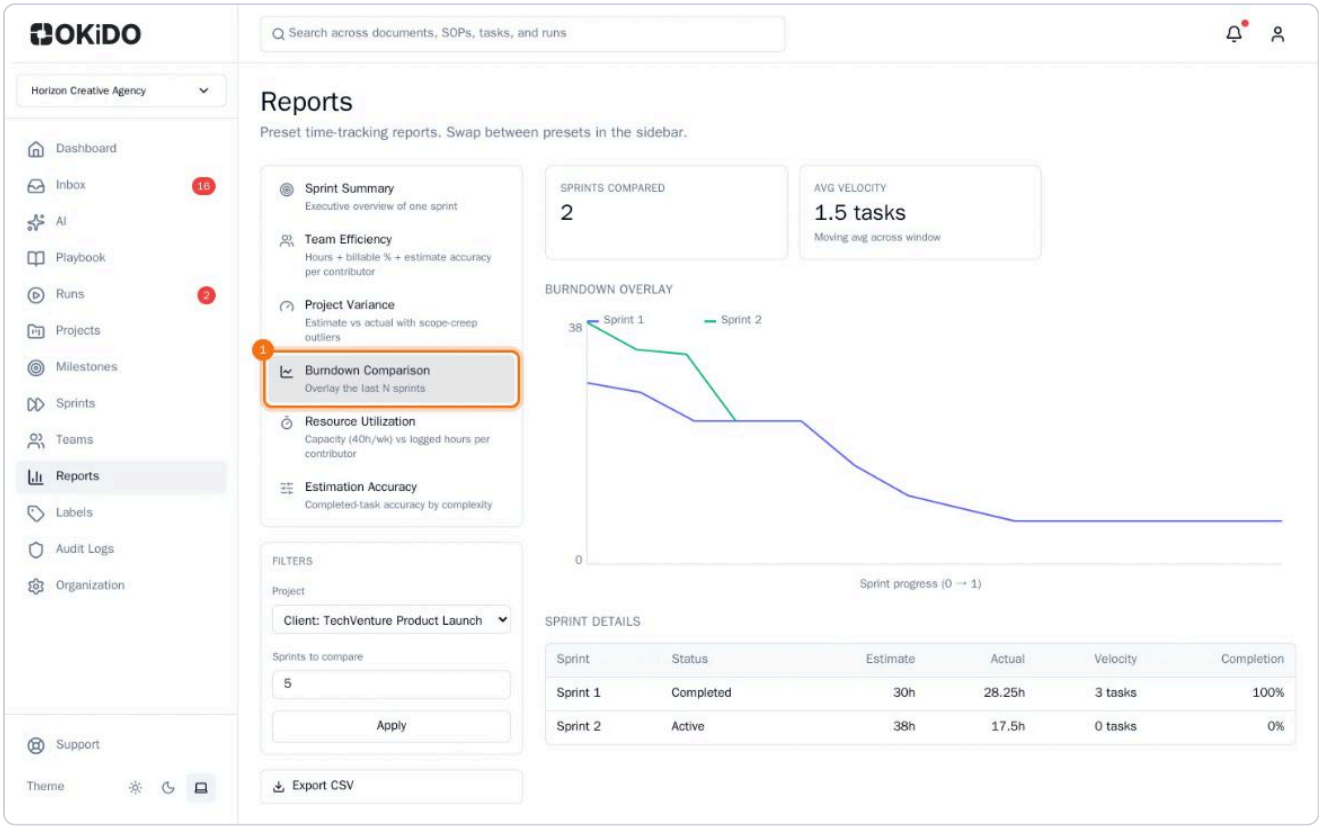
The report updates as soon as you change a filter. Choose **Apply** to build it again with the latest time entries.



The **Sprint Summary** shows the current sprint of the project you choose, or the last finished one when no sprint is running.

Read the results

Each report starts with its totals at the top, followed by a table. In **Team Efficiency**, for example, a higher estimate accuracy percentage means the time logged was further off the estimates. In **Burndown Comparison**, each line is one sprint: the steeper it falls, the faster that sprint's work was done.



To take a report into a spreadsheet, see Export a report to CSV.

Export a report to CSV

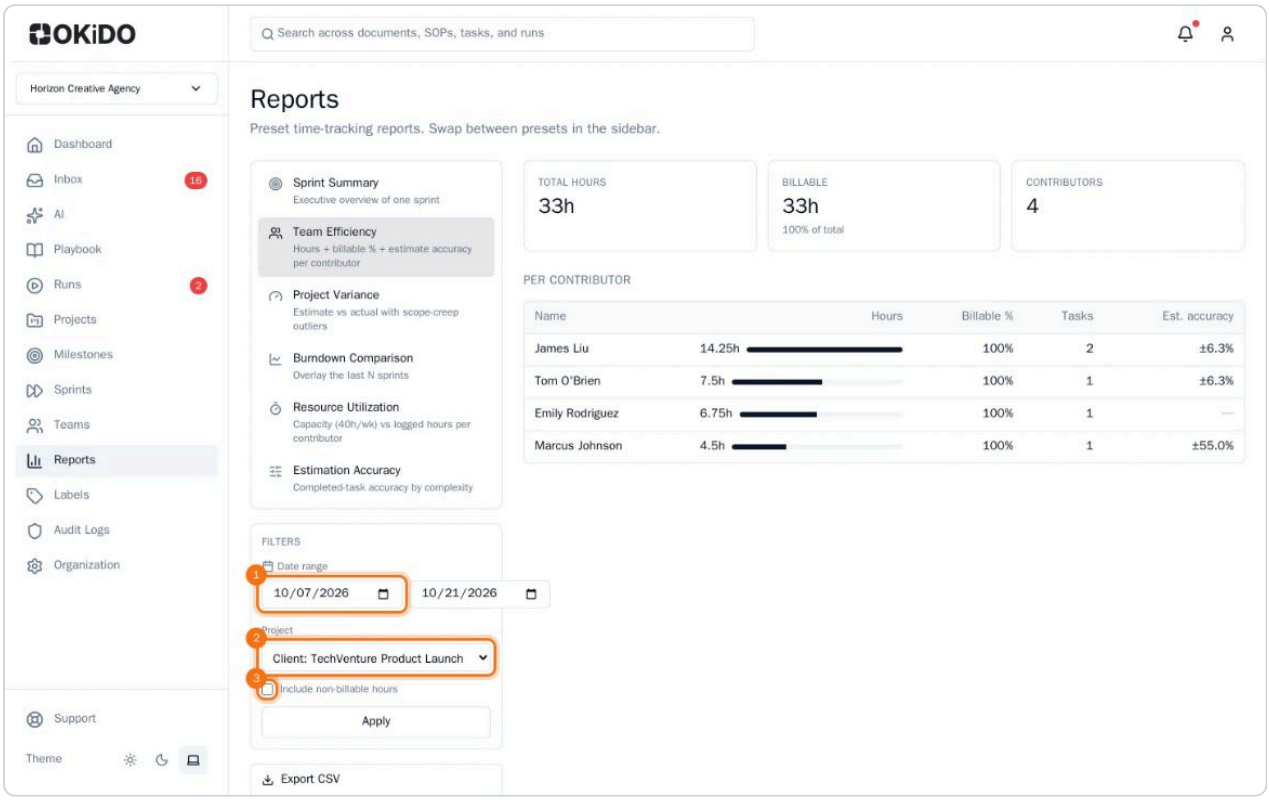
Download the report you are looking at as a CSV file for a spreadsheet or an invoice.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

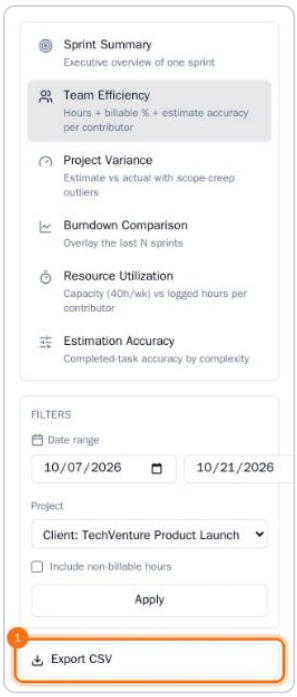
Every time report can go to a spreadsheet: export it as a CSV file, with the same filters you see on the page. That is handy for an invoice, a client update or your own calculations.

Export a report

1. Choose **Reports** in the sidebar and open the report. See Run a time report.
2. Set the filters, for example a date range, one project and only billable hours (clear **Include non-billable hours**).



3. Choose **Export CSV** under the filters.



Your browser downloads the file, named after the report and today's date, for example `report-team-efficiency-2026-10-21.csv`. It holds one line per row of the report's table, such as one line per person or per task.

Open it in a spreadsheet such as Excel, Numbers or Google Sheets.

CHAPTER 7

Teams and Smart Labels

Create a team

Add people to a team

Create a Smart Label

Add custom fields to a label

Organize labels into categories

See all tasks with a label

Read this chapter online

okido.io/en/docs/teams-labels

Scan the code or open the link to read this chapter online, where it is always up to date.

Create a team

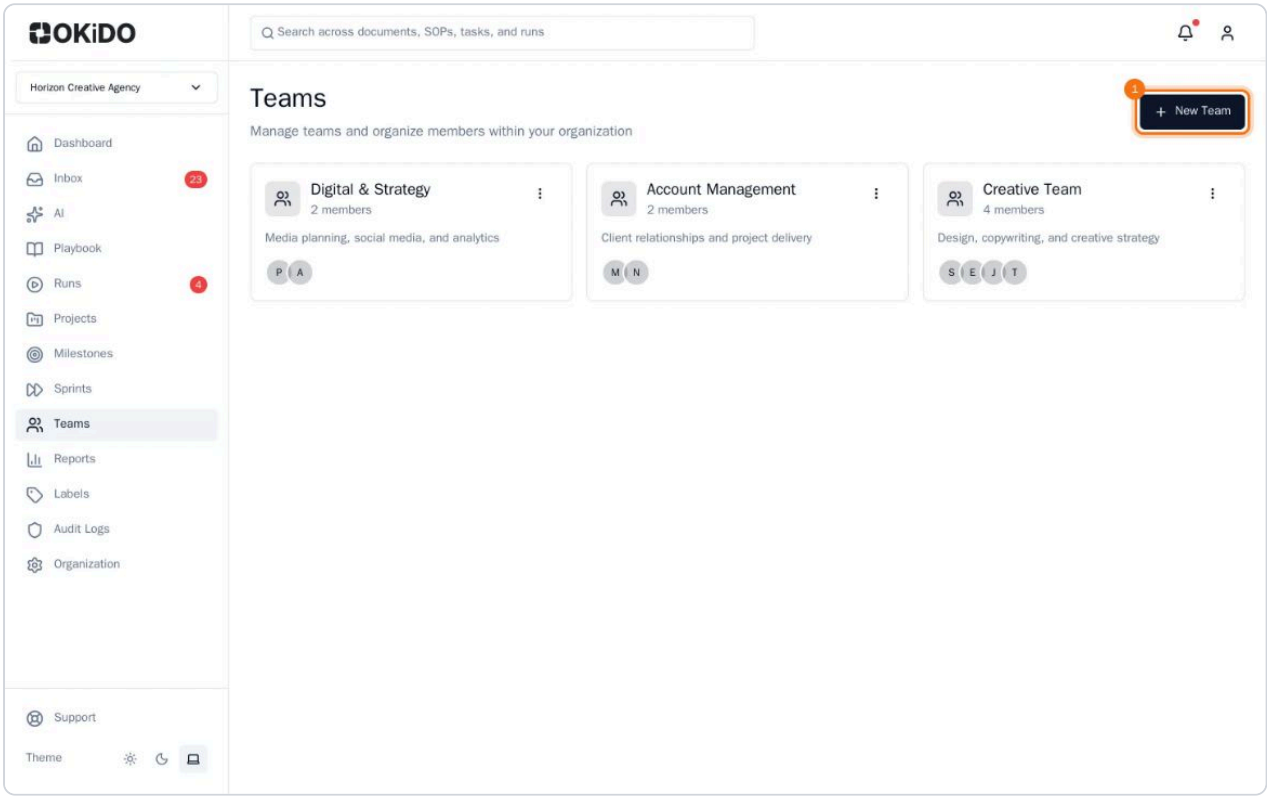
Create a team to group people for assignments, project and Playbook access, and filters.

Available on: Starter · Pro · Business | Who can do this: Owner, Admin

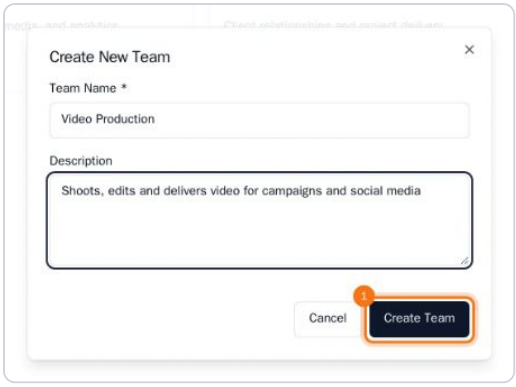
A team groups the people who work together, such as the creative team or account management. Assign a task to a whole team, give a team access to a private project or a Playbook folder in one go, and filter a project's tasks by team. Organization owners and admins create teams; everyone can see them.

Create a team

1. Choose **Teams** in the sidebar, then **New Team**.



2. Enter the team name and, if you like, a **Description** of what the team does.
3. Choose **Create Team**.



The team appears first in the list, with no members yet. Next, add people to the team.

Rename or delete a team

- To rename a team or change its description, click the team, choose **Edit**, make the change and choose **Save Changes**.
- To delete a team, choose the menu button on its card, then **Delete Team**, and confirm with **Delete**. This cannot be undone.

Teams are part of the STARTER, PRO and BUSINESS plans.

Add people to a team

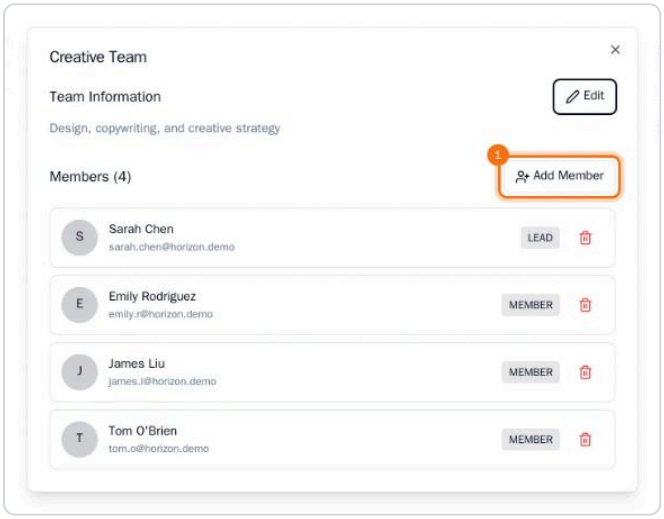
Add people to a team as Member, Lead or Admin, change their team role and remove them again.

Available on: Starter · Pro · Business | Who can do this: Owner, Admin

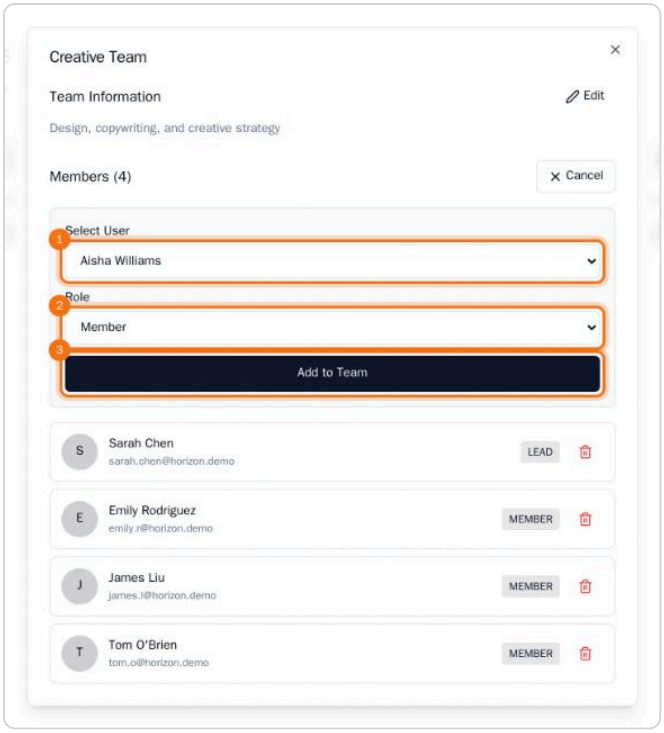
A team is only as useful as the people in it. Add everyone who works in the team, and mark who leads it. Organization owners and admins can add and remove team members. Anyone in the organization can be in several teams.

Add a person

1. Choose **Teams** in the sidebar and click the team.



2. Choose **Add Member**.
3. Under **Select User**, choose the person.
4. Under **Role**, choose **Member**, **Lead** or **Admin**.
5. Choose **Add to Team**.



The person now appears in the team, with their role next to their name. Only people who are already in your organization can be added: invite new people first.

Remove a person

1. Click the team.
2. Choose the bin next to the person.
3. Choose **Remove**.

The person leaves the team. They stay in the organization and keep the tasks assigned to them.

Change someone's team role

A team role cannot be changed in place. Remove the person from the team, then add them again with the new role.

Create a Smart Label

Create a label with a name, color, category and description to put on tasks, documents and SOP templates.

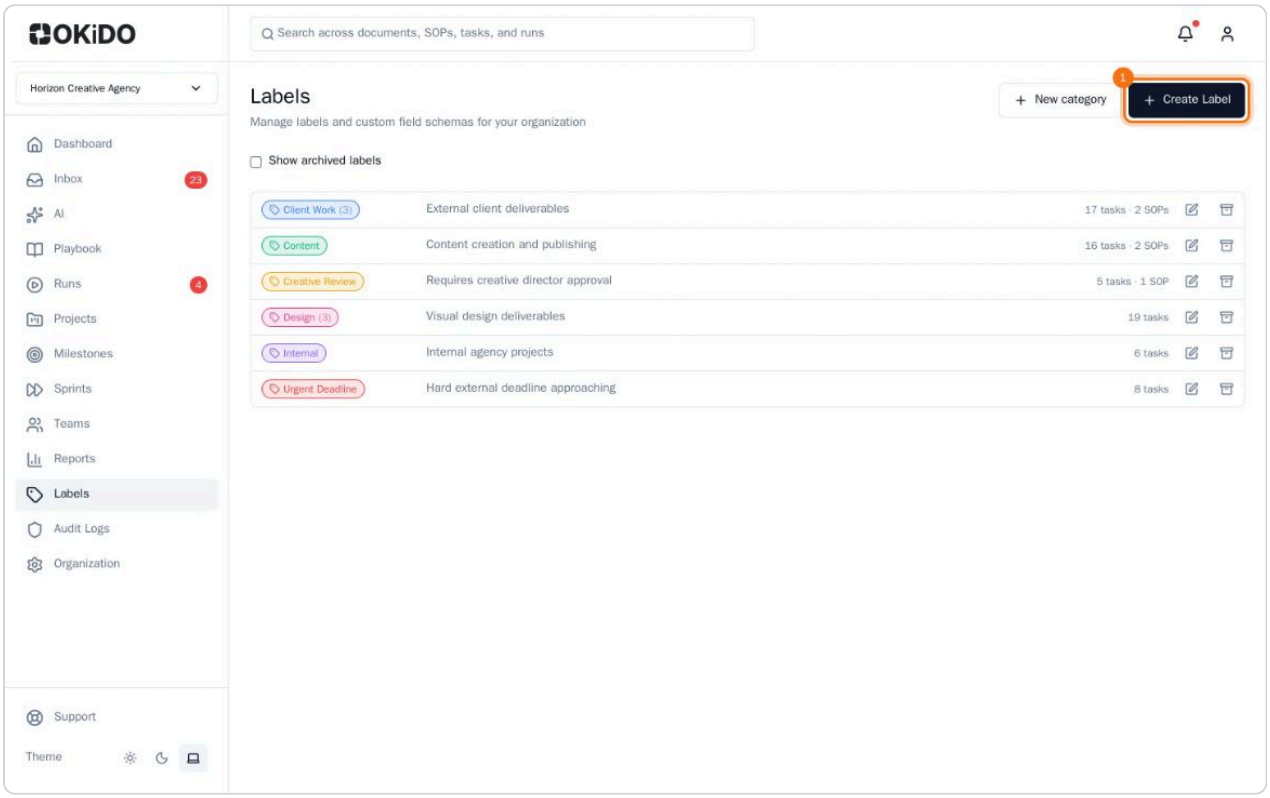
Available on: All plans | Who can do this: Owner, Admin

Labels mark what work is about, such as a client, a type of work or a deadline. One set of labels serves the whole organization: put them on tasks, documents and SOP templates, and filter by them. Labels in OKiDO are Smart Labels: besides a name and a color, they can carry their own fields, see Add custom fields to a label.

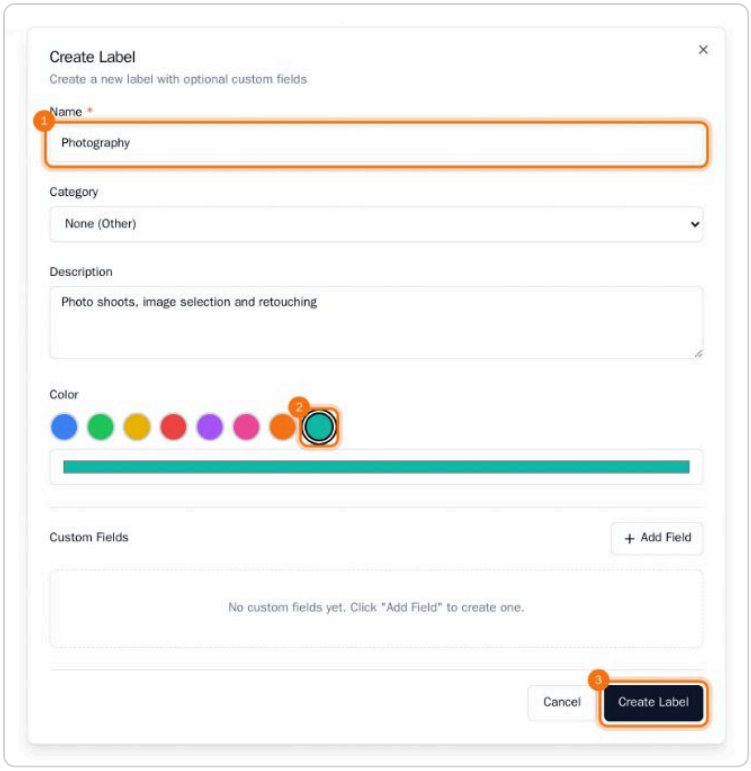
Organization owners and admins create and change labels. Everyone else sees them read-only.

Create a label

1. Choose **Labels** in the sidebar.



2. Choose **Create Label**.
3. Enter a **Name**.
4. Choose a **Category** if you group your labels, or keep **None (Other)**.
5. Add a **Description** that says when to use the label.
6. Pick a **Color**, or choose any color with the color field below the swatches.
7. Choose **Create Label**.



The label appears on the Labels page, marked "Not used yet" until it is on a task, document or SOP template. Two labels in the same category cannot have the same name.

Change a label

1. On the **Labels** page, choose the pencil next to the label.
2. Change what you need, then choose **Update Label**.

The change shows everywhere the label is used. To stop using a label, archive it: see Organize labels into categories.

Add custom fields to a label

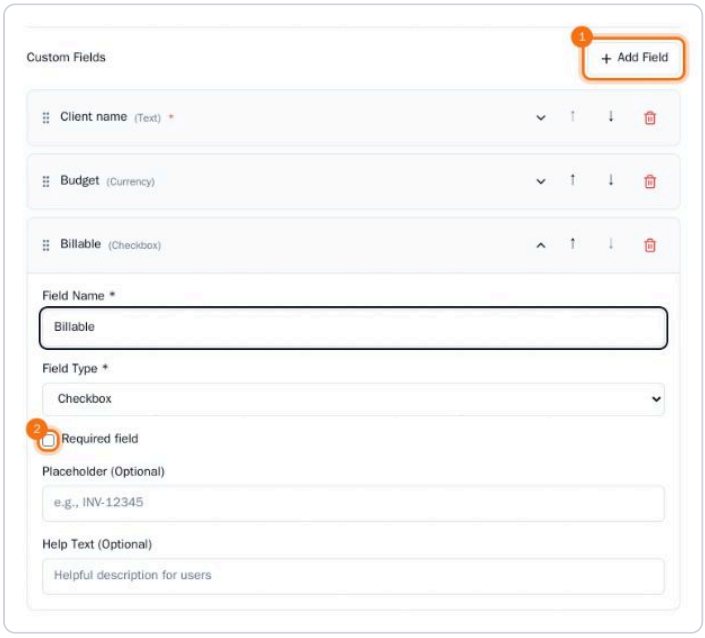
Give a label its own fields, such as text, an amount, a date or a choice, to fill in on every task that carries the label.

Available on: All plans | Who can do this: Owner, Admin

A label can bring its own fields. Give the Client Work label a client name, a budget and whether the work is billable, and every task with that label gets those fields to fill in. Organization owners and admins set up the fields.

Add fields to a label

1. Choose **Labels** in the sidebar, then the pencil next to the label.
2. Under **Custom Fields**, choose **Add Field**. A new field opens.
3. Enter the **Field Name**.
4. Choose the **Field Type**, for example **Text**, **Number**, **Currency**, **Date**, **Select (Dropdown)** or **Checkbox**.
5. Select **Required field** if the field must always be filled in. Add a placeholder or help text if it helps people fill it in.
6. Repeat for each field, then choose **Update Label**.

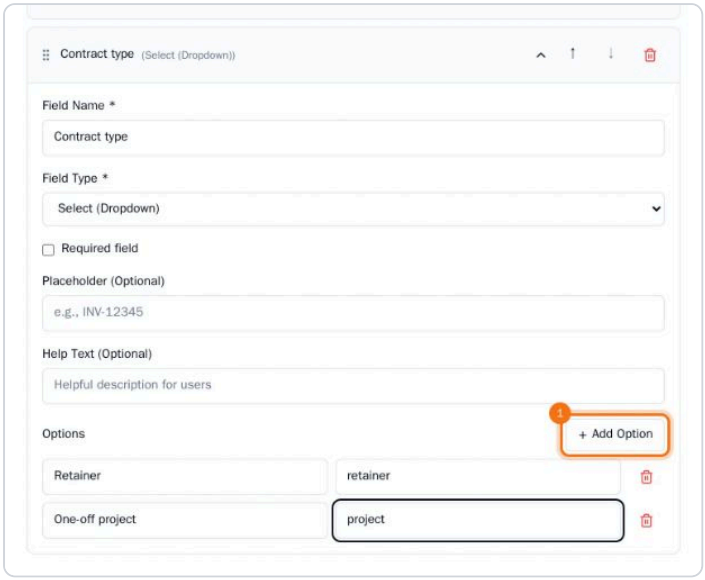


Click a field's name to open or close it. Use the arrows to change the order of the fields, and the bin to remove one.

Offer a list of choices

For a **Select (Dropdown)** or **Multi-Select** field:

1. Choose **Add Option** under **Options**.
2. Enter what people see in the first box, and the value to store in the second.
3. Repeat for each choice.



For a number or an amount, you can also set the lowest and highest value. For text, set the shortest and longest length.

Where the fields show up

On the **Labels** page, the label shows its number of fields. Every task that carries the label shows the fields under **Custom Fields** in the task, where they save as you type. See Add Smart Labels to a task.

A label field can also be required before a task enters a board column. See Add rules to a column.

Organize labels into categories

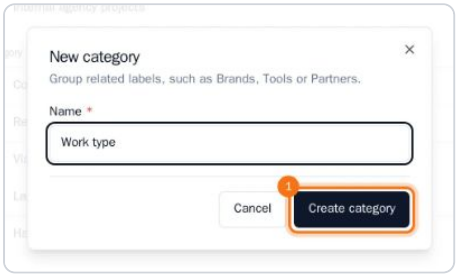
Group labels into categories, put the categories in order and archive the labels you no longer use.

Available on: All plans | Who can do this: Owner, Admin

As the number of labels grows, categories keep them easy to find: one for the type of work, one for clients, one for brands. Labels are grouped by category on the Labels page and when someone picks labels for a task. Organization owners and admins organize the labels.

Create a category

1. Choose **Labels** in the sidebar, then **New category**.
2. Enter the name and choose **Create category**.



The category appears on the Labels page, still empty.

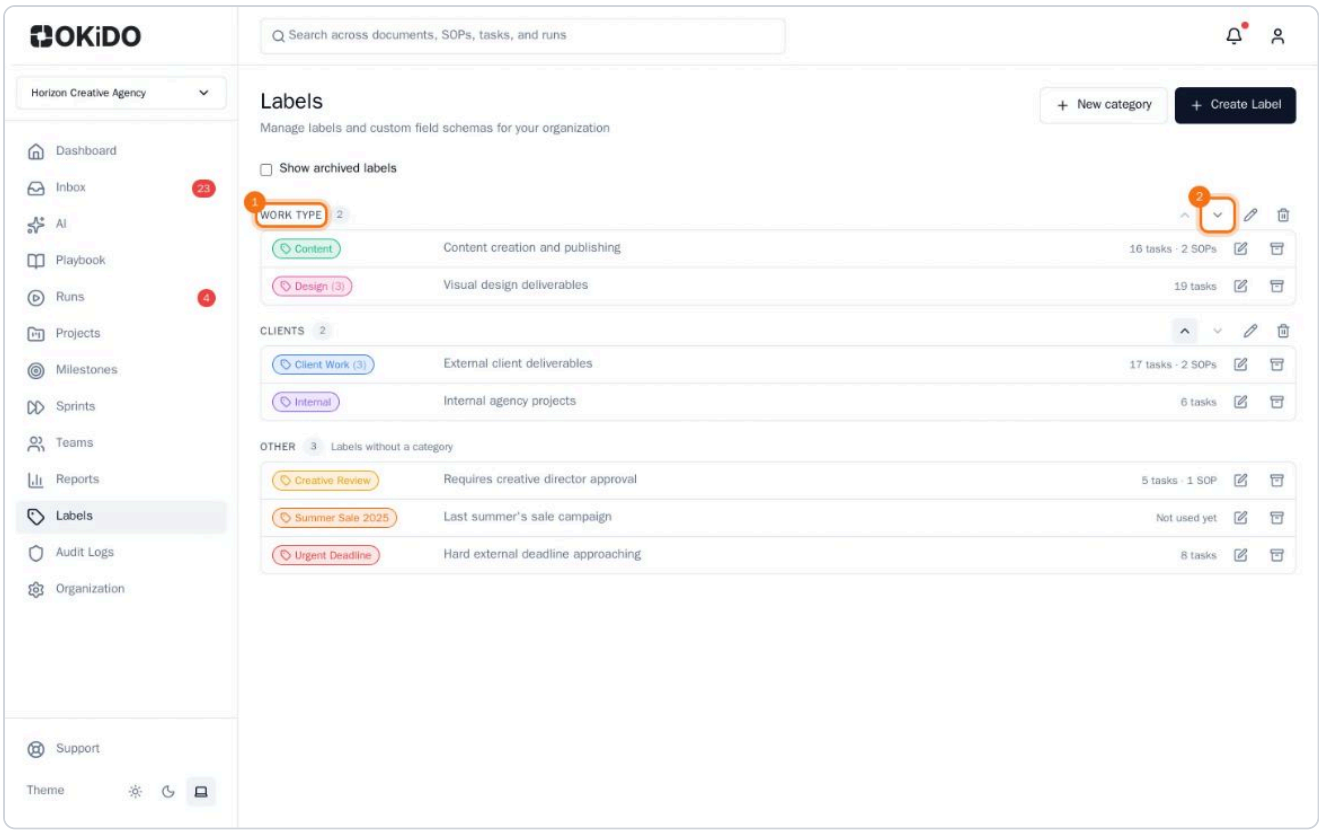
Put a label in a category

1. Choose the pencil next to the label.
2. Choose the **Category**.
3. Choose **Update Label**.

The label moves under its category. Labels without a category are listed under **Other**. Two labels can have the same name when they are in different categories.

Put the categories in order

Use the arrows next to a category's name to move it up or down.



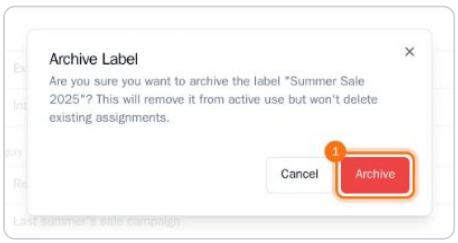
Rename or delete a category

- Choose the pencil next to a category's name to rename it.
- Choose the bin next to a category's name, then **Delete**, to delete it. Its labels move to **Other** and stay on their tasks and documents.

Archive a label

Archive a label you no longer use, such as last year's campaign.

1. Choose the archive button (the box) next to the label.
2. Choose **Archive**.



The label leaves the list and is no longer offered for new tasks and documents, but it stays where it is already used. To see archived labels, select **Show archived labels**.

> **Tip:** An archived label cannot be brought back from the app, and its name stays taken in its category. Archive only labels you are done with.

See all tasks with a label

Open a label's page to see every task that carries it, across all projects.

Available on: All plans | Who can do this: Everyone in the organization

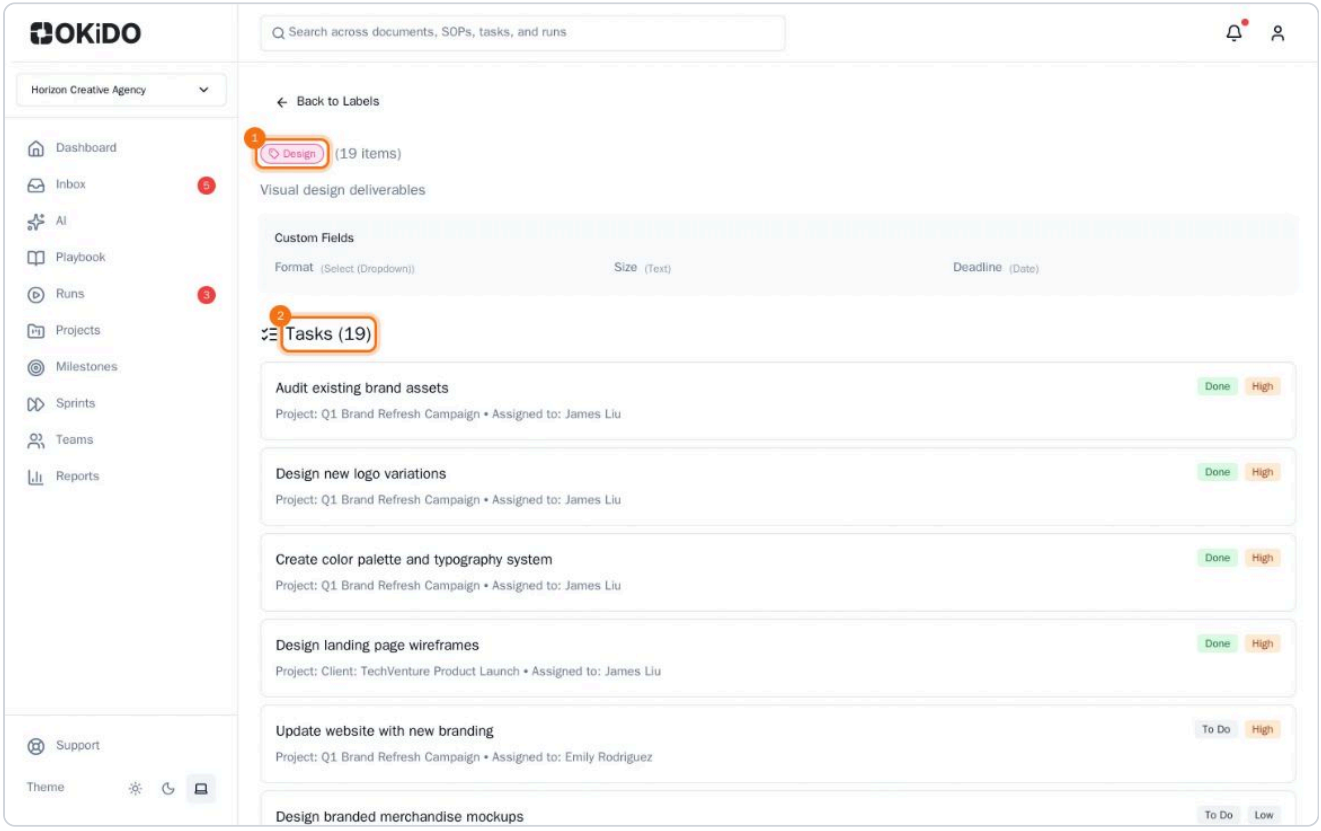
Every label has its own page that brings together the tasks carrying it, from every project. Use it to see all the design work in the agency, or everything for one client, in one place. Everyone in the organization can open it.

Open a label's page

The Labels page does not link to a label's page yet, so open it by its address: your OKiDO address followed by `/labels/` and the label's name in lowercase, with dashes instead of spaces. For example, the page of the Design label is at `/labels/design`. For a label in a category, the category's name comes first, as in `/labels/work-type-design`.

What the page shows

At the top are the label, its description, the number of items that carry it and the label's custom fields, if it has any. Below is the list of tasks, each with its project, assignee, status and priority.



Click a task to open its project. Choose **Back to Labels** to go to the Labels page.

To put a label on a task, see Add Smart Labels to a task.

CHAPTER 8

Playbook

Organize the Playbook with folders and processes

Give teams access to a folder

Write a document

Review and publish a document

Compare and restore document versions

Record your screen

Read this chapter online

okido.io/en/docs/playbook

Scan the code or open the link to read this chapter online, where it is always up to date.

Organize the Playbook with folders and processes

Create folders and processes, rename and move them, and add documents, SOPs, recordings and decision trees to a process.

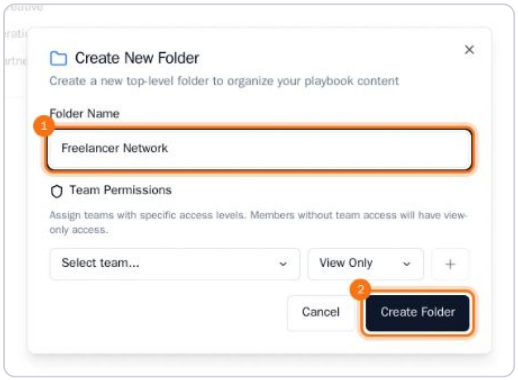
Available on: All plans | Who can do this: Owner, Admin

The Playbook holds how your organization works. Folders group the areas of your work, such as client operations. A process inside a folder describes one way of working, such as onboarding a client, and holds its documents, SOP checklists, recordings and decision trees.

Only owners and admins can create, rename and move folders and processes.

Create a folder

1. Open the **Playbook** and choose **New Folder**.
2. Type the **Folder Name**. To decide right away which teams may work in it, add them under **Team Permissions** (see Give teams access to a folder).
3. Choose **Create Folder**.

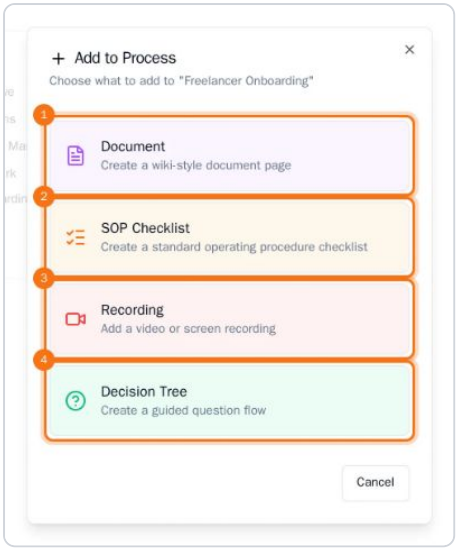


Add a process

1. Click the folder to open it, then choose **Add** below its contents.
2. Choose **Process**. You can also add a subfolder here (**Folder**) or a system.
3. Type the **Process Name** and choose **Create**.

Add documents, SOPs, recordings and decision trees

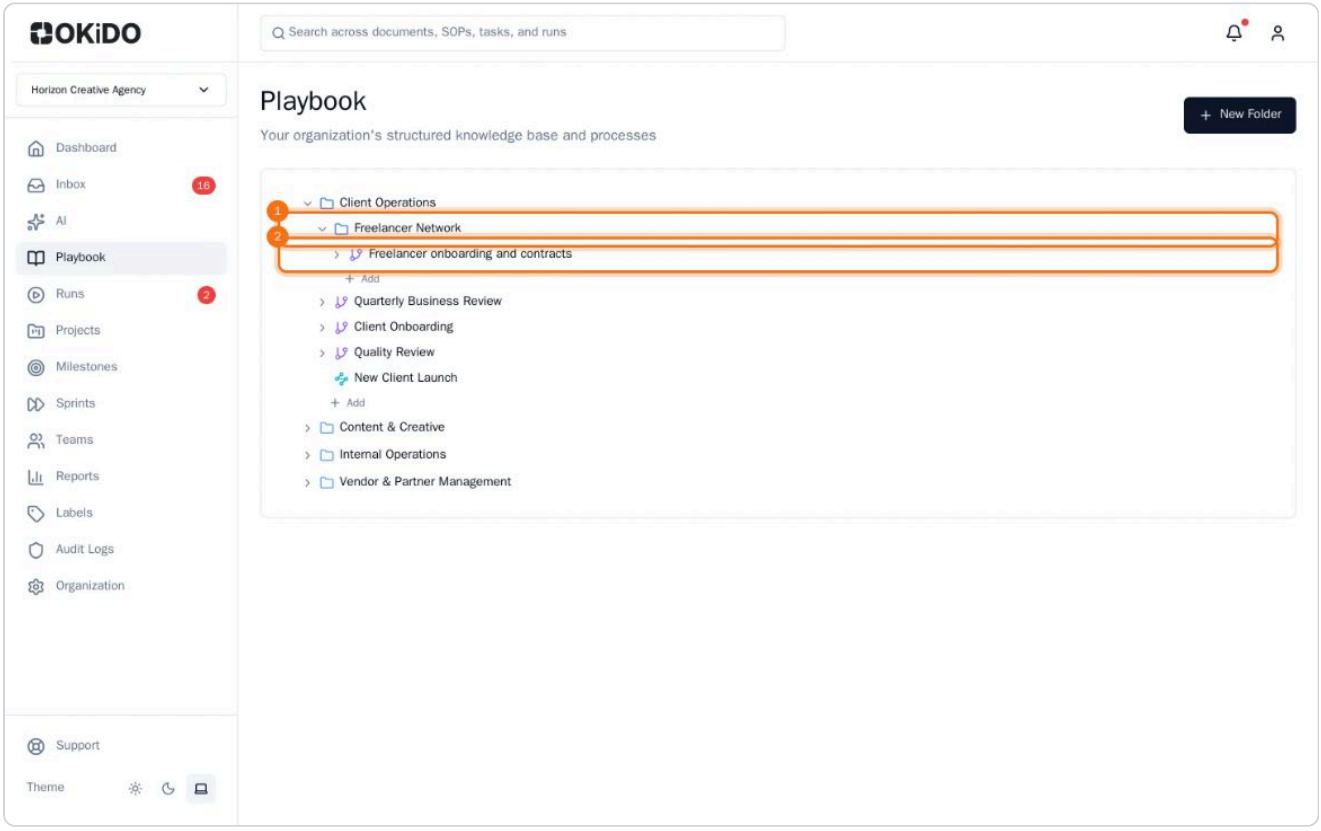
1. Click the process to open it, then choose **Add** below its items.
2. Choose what to add: a **Document**, an **SOP Checklist**, a **Recording** or a **Decision Tree**.



OKiDO then opens the editor or the recorder for the new item. See Write a document, Record your screen, Create an SOP template and Build a decision tree.

Rename and move

- To rename a folder or a process, right-click it and choose **Rename**. Type the new name and choose **Rename** again.
- To move a folder into another folder, drag it onto that folder. Drag it just above or below another folder to change the order instead.
- To move a process to another folder, drag it onto that folder. Drag it onto another process in the same folder to change the order.



Give teams access to a folder

Choose which teams can only read a Playbook folder and which can change what is in it.

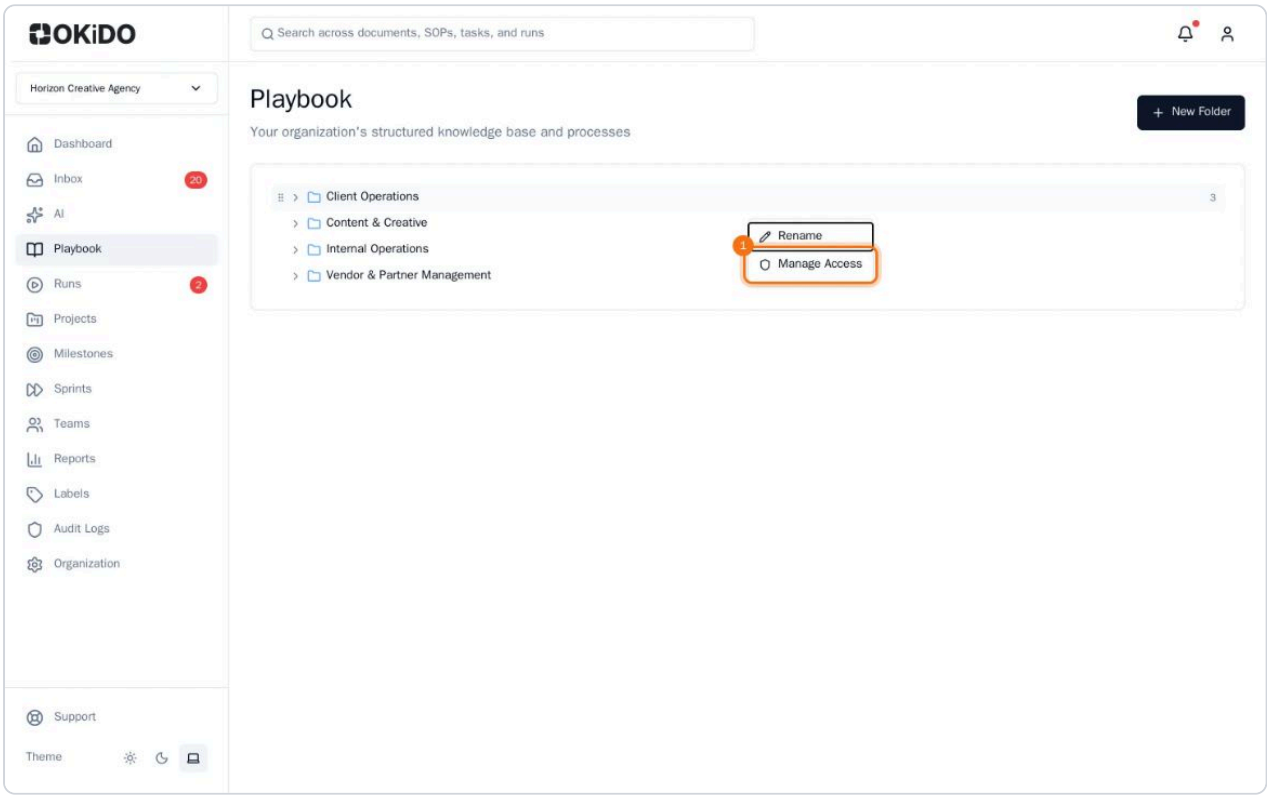
Available on: Starter · Pro · Business | Who can do this: Owner, Admin

Owners and admins can change everything in the Playbook. Other members can read it all, but they can only change what their team has been given access to. Give the team that runs a process full access to its folder, so they can keep its documents and SOPs up to date.

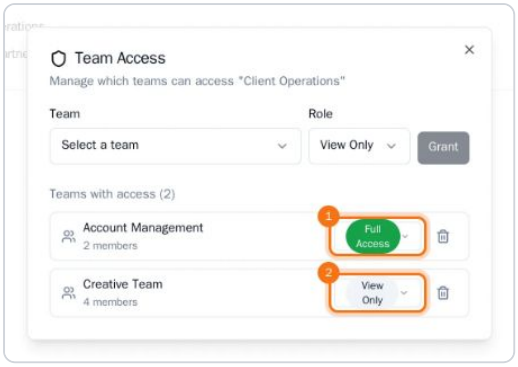
Only owners and admins can manage access.

Give a team access

1. Open the **Playbook**, right-click the folder and choose **Manage Access**.



2. Under **Team**, choose the team.
3. Under **Role**, choose **View Only** or **Full Access**.
4. Choose **Grant**.



The team is added to the list with its number of members. Repeat the steps for every team.

What the access means for the members of a team:

- **View Only**: they can open and read everything in the folder's processes.
- **Full Access**: they can also create and change documents, SOPs and decision trees there.

Someone in several teams gets the highest access of their teams.

Change or remove access

Open **Manage Access** again. In the list, choose another access for a team, or choose the bin next to it to take its access away.

> **Tip:** You can give access to a single process in the same way: right-click the process instead of the folder. Its members then get the higher of the two.

Write a document

Create a wiki-style document in a process and write it with the rich-text editor.

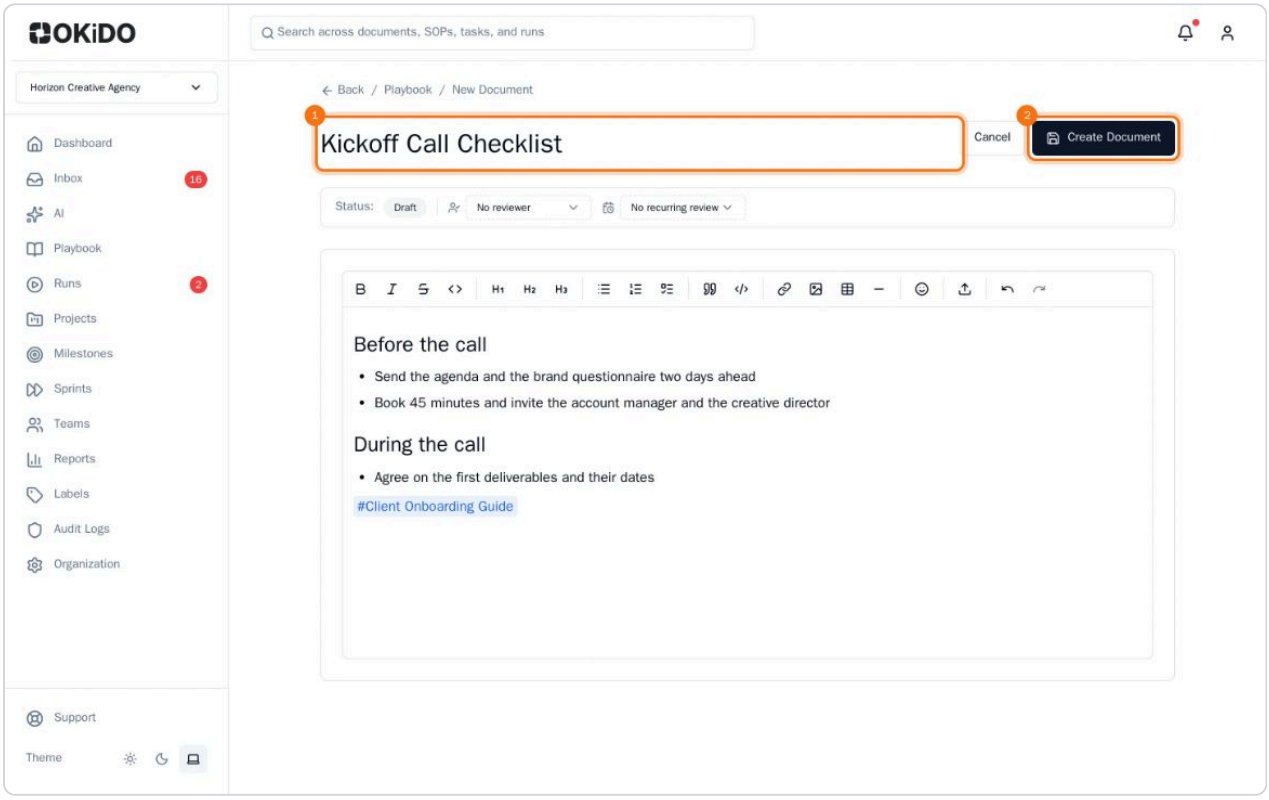
Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Documents hold the knowledge behind a process: guides, checklists, agendas, style rules. Write them once in the Playbook, and everyone finds them next to the process they belong to.

Owners and admins can write documents everywhere. Other members need full access to the folder through their team (see Give teams access to a folder).

Create a document

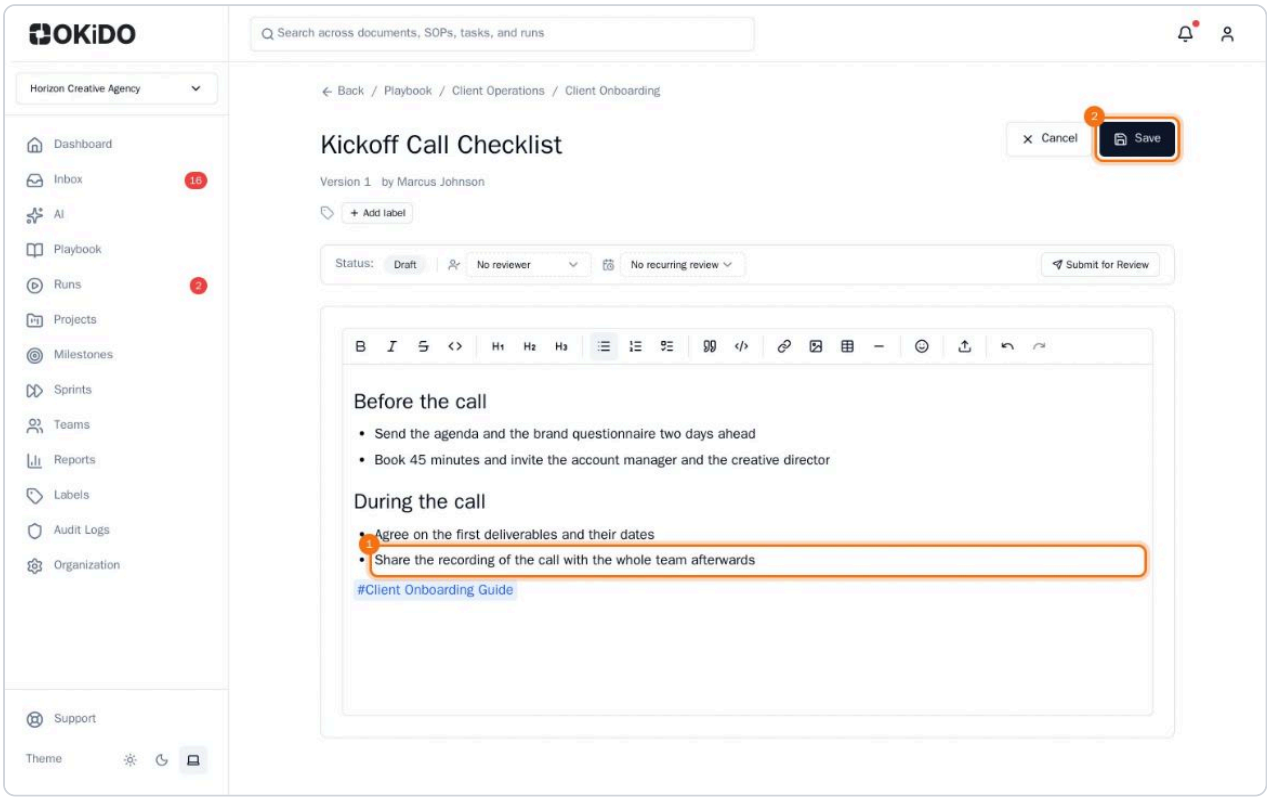
1. Open the **Playbook**, then the folder and the process the document belongs to.
2. Choose **Add** below the process, then **Document**.
3. Type the title at the top, where it says **Document title...**.
4. Write the document in the editor below. Use the toolbar for headings, lists, tables, images and links. Type # and a few letters to link to a task, another document or an SOP.
5. Choose **Create Document**.



The document opens as readers see it. It starts as a draft: to have it checked and published, see Review and publish a document.

Change a document

1. Open the document and choose **Edit**.
2. Make your changes in the editor. You can change the title as well.
3. Choose **Save**.



Every save that changes the text adds a version to the document's history, so nothing is lost. See Compare and restore document versions.

Review and publish a document

Send a document for review, approve it, publish it for readers and set how often it must be reviewed again.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Before a document becomes the way your organization works, someone checks it. A new document is a draft. Once it is approved you publish it: from then on, readers see the published version, while you can keep working on the next one.

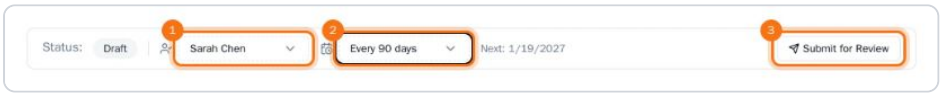
The review bar at the top of the document shows its status and the next step. You see it when you may edit the document.

Choose a reviewer and a review cycle

1. Open the document. In the review bar, choose the reviewer where it says **No reviewer**.
2. Next to it, choose how often the document must be reviewed, for example **Every 90 days**. The bar then shows the date of the next review.

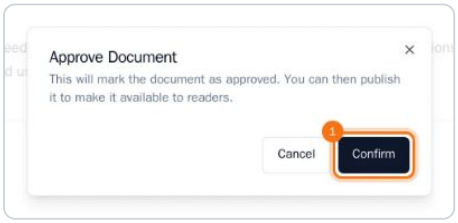
Send it for review

Choose **Submit for Review**. The status changes to **In Review**, and the reviewer gets a notification.



Approve it or ask for changes

1. The reviewer opens the document and reads it.
2. They choose **Approve**, then **Confirm**. If something has to change, they choose **Request Changes** instead, and the document goes back to **Draft**.

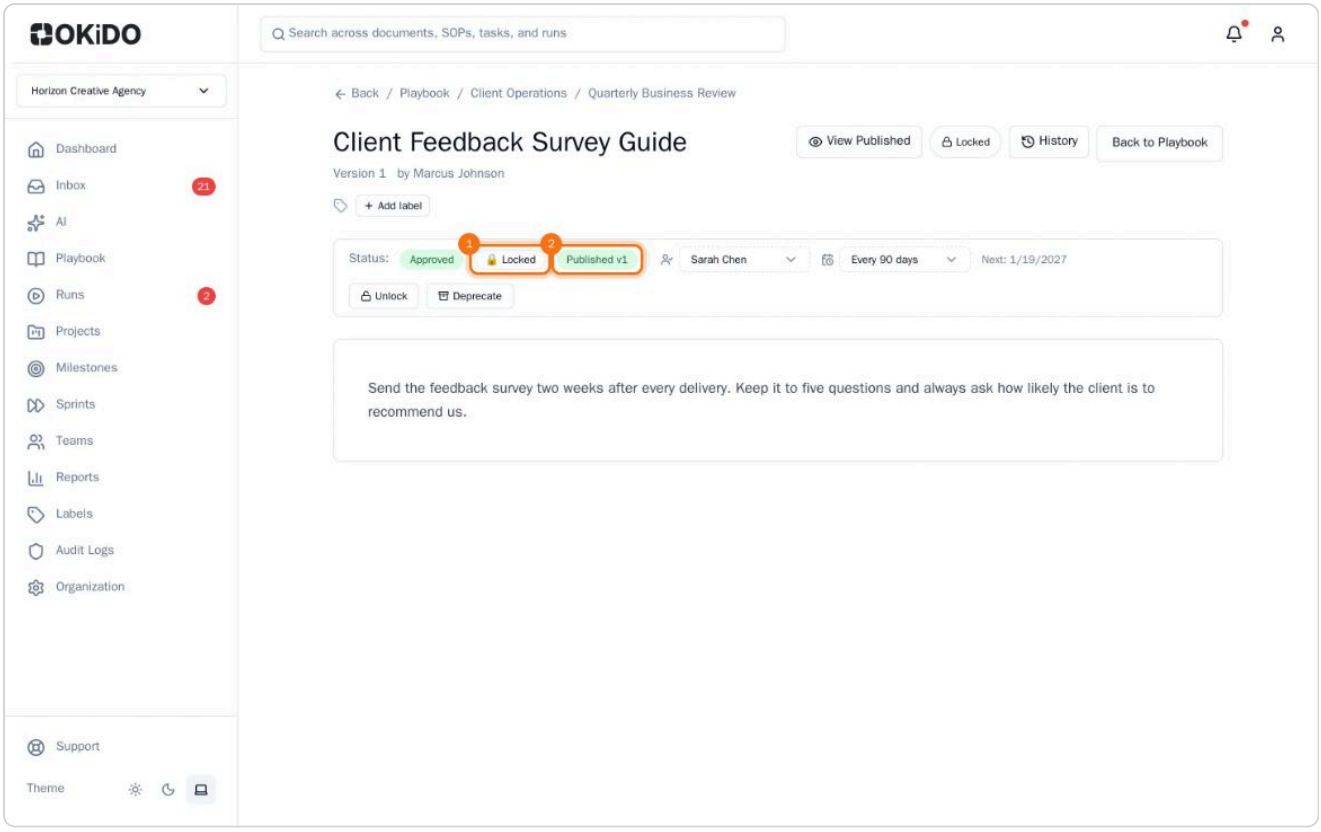


Anyone who may edit the document can approve it; the reviewer is the person who is asked to.

Publish it

Once the document is **Approved**, choose **Publish**, then **Confirm**.

The bar now shows the published version, and the document is locked against changes. Members who may only read the document see this published version.



To work on a new version, choose **Unlock** and confirm. The document becomes a draft again, but readers keep seeing the published version until you publish again. Until then the bar shows **Unpublished changes**, and **Compare** shows what changed since the published version.

Compare and restore document versions

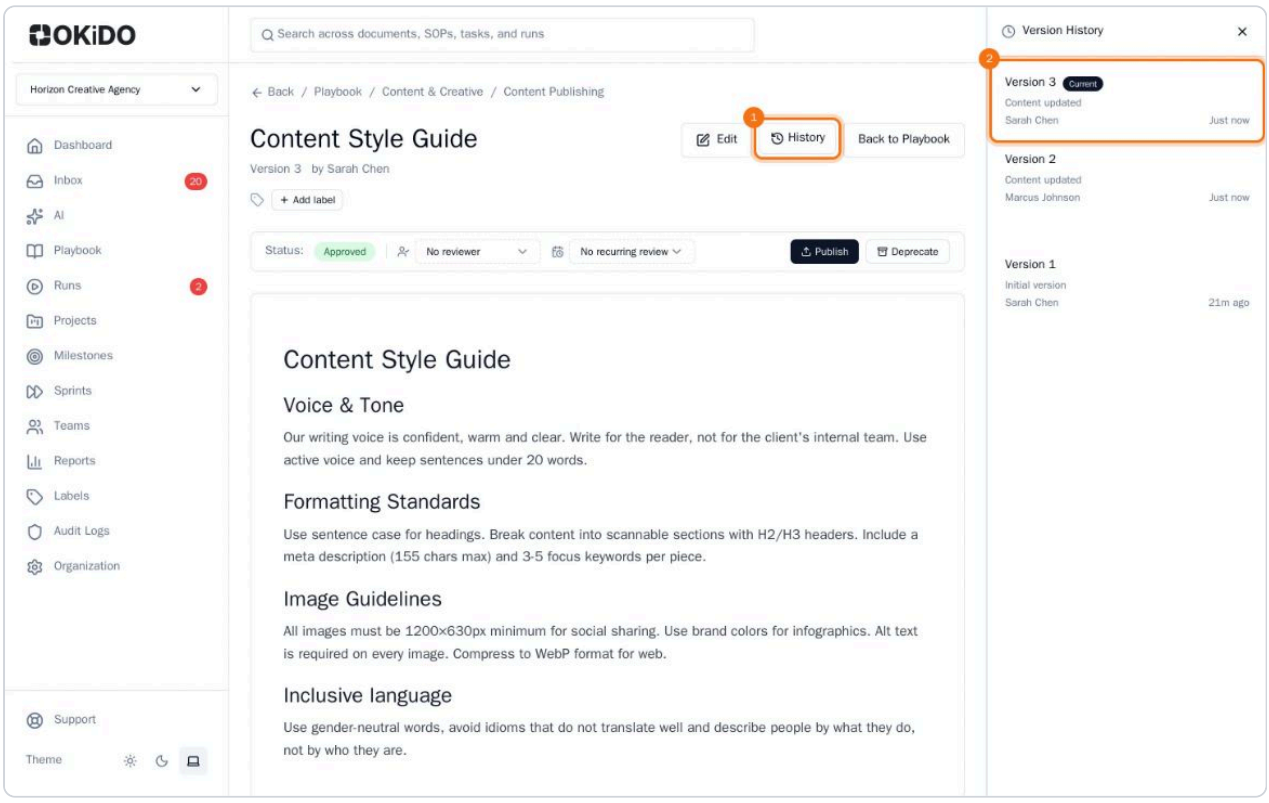
Open a document's version history, compare a version with the current text and restore an older one.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Every time someone saves a change to a document's text, OKiDO keeps the version before it. See who changed what and when, and go back to an earlier version if a change was a mistake.

Open the version history

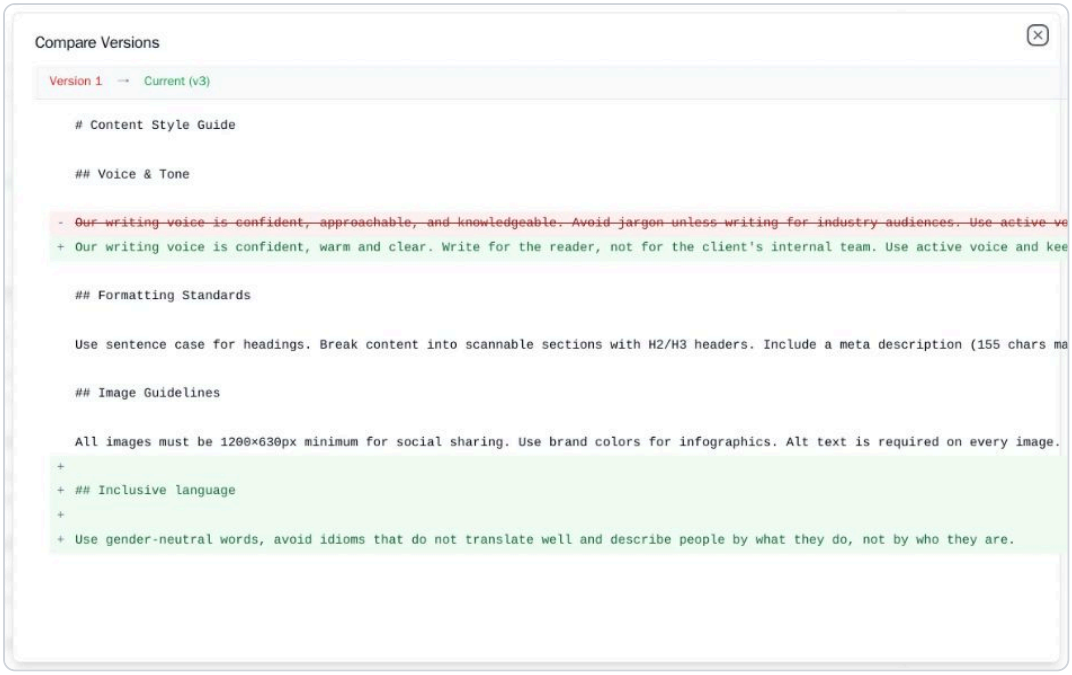
1. Open the document and choose **History**.
2. The **Version History** opens on the right, newest version first, with who saved each version and when. The version you are reading is marked **Current**, the one readers see is marked **Published**.



3. Click a version to read it as it was. Choose **Exit Preview** to go back to the current text.

Compare a version with the current text

Point at a version in the history and choose **Compare**. The comparison lists the text line by line: lines that were added since that version are green, lines that were removed are red and struck through.



Restore an older version

1. Point at the version you want back and choose **Restore**.
2. Confirm with **Restore**.

The text of that version becomes the current text, as a new version. The versions in between stay in the history, so you can always go forward again. A published document is locked: unlock it first (see Review and publish a document).

Record your screen

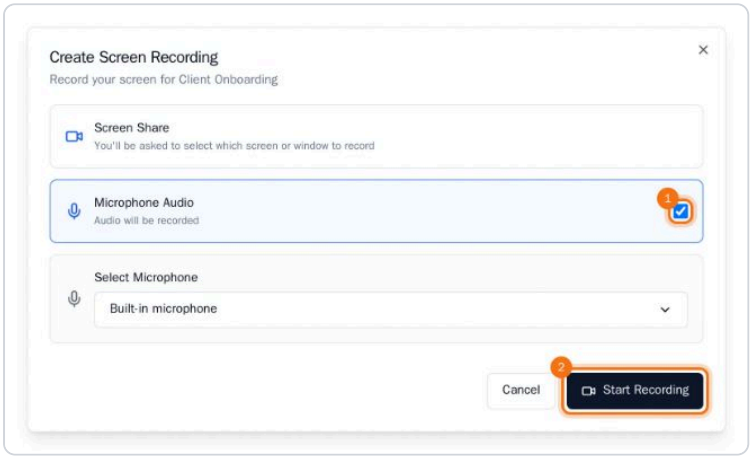
Record a video of your screen with your voice in a process and watch it back.

Available on: All plans | Who can do this: Everyone in the organization

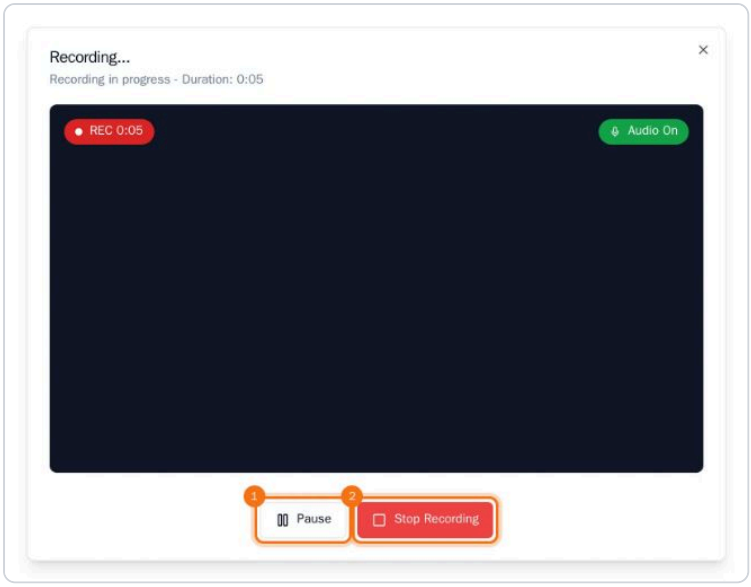
Showing is often faster than writing. Record your screen while you talk someone through the work, and keep the video in the process where people look for it.

Record a video

1. Open the **Playbook**, then the folder and the process the recording belongs to.
2. Choose **Add** below the process, then **Recording**.
3. Leave **Microphone Audio** on to record your voice, and choose your microphone if you have more than one.
4. Choose **Start Recording**. Your browser asks which screen, window or tab to share: choose one and confirm.



5. After a countdown of three seconds the recording starts, and the window shows what is being recorded. Choose **Pause** if you need a moment, and **Stop Recording** when you are done.

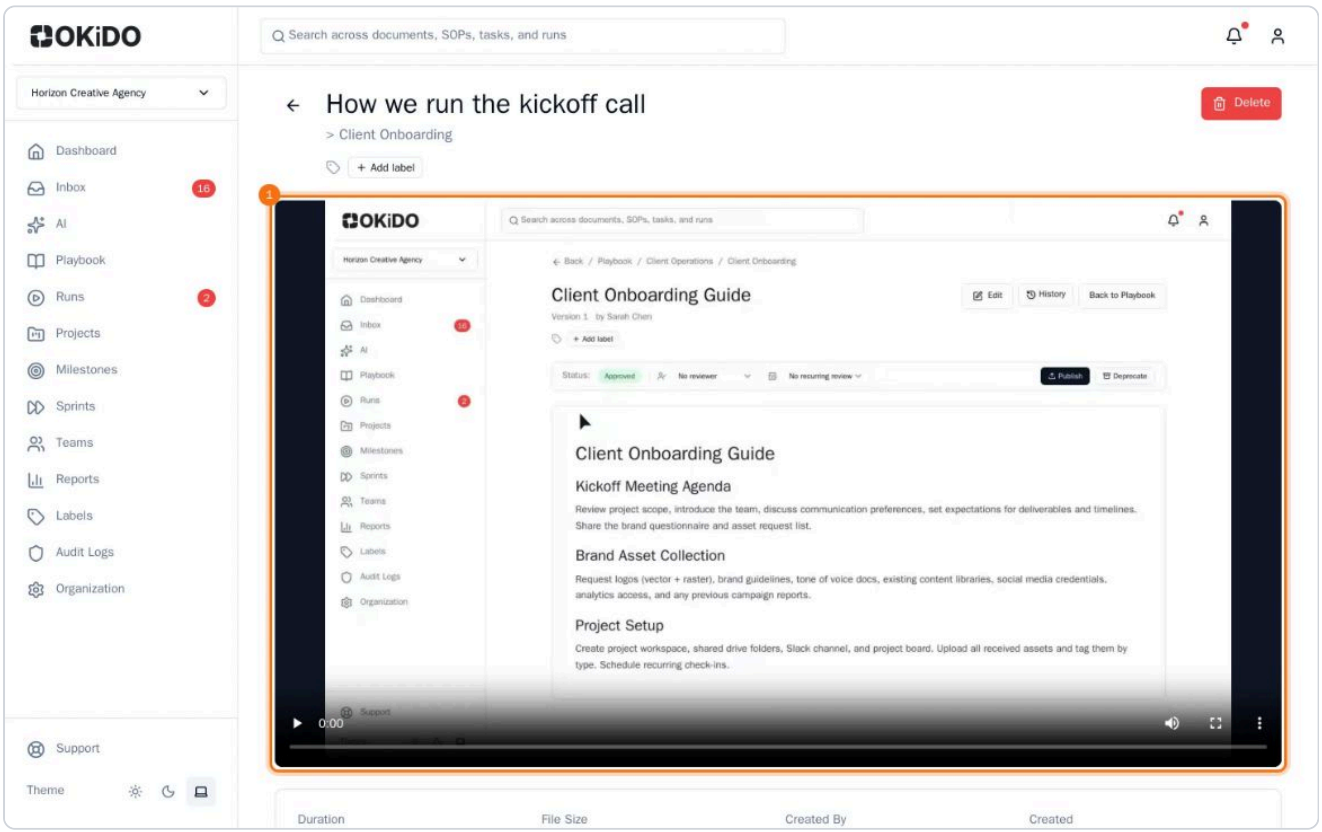


6. Watch the preview. Give the recording a title, add a description if you like and choose **Save Recording**. Not happy with it? Choose **Re-record** to start again.

The recording is now listed under the process, with a red video icon.

Watch a recording

Click the recording in the Playbook. It opens with its player, how long it is, who recorded it and when.



> **Tip:** To explain a single task, record a briefing on the task itself. See Attach files and record a briefing.

CHAPTER 9

SOPs and runs

Create an SOP template

Add checklists, files and variables to steps

Add an approval gate to a step

Assign steps to teams and AI agents

Start a run

Complete the steps of a run

Approve a step in a run

Track and manage runs

Schedule a recurring run

Share a run with a customer

Read this chapter online

okido.io/en/docs/sops-runs

Scan the code or open the link to read this chapter online, where it is always up to date.

Create an SOP template

Create an SOP checklist in a Playbook process, add its steps and publish a version your team can run.

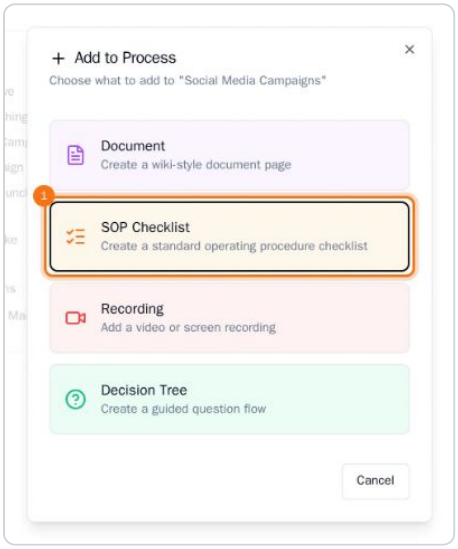
Available on: All plans | Who can do this: Owner, Admin

An SOP template is the checklist for work your team does again and again, such as onboarding a client or wrapping up a campaign. You create it inside a process of your Playbook, add its steps once, and from then on anyone can start a run from it.

Only owners and admins can create SOP templates.

Create the template

1. Open **Playbook**, then open the folder and the process the SOP belongs to.
2. Under the process, choose **Add**, then **SOP Checklist**.

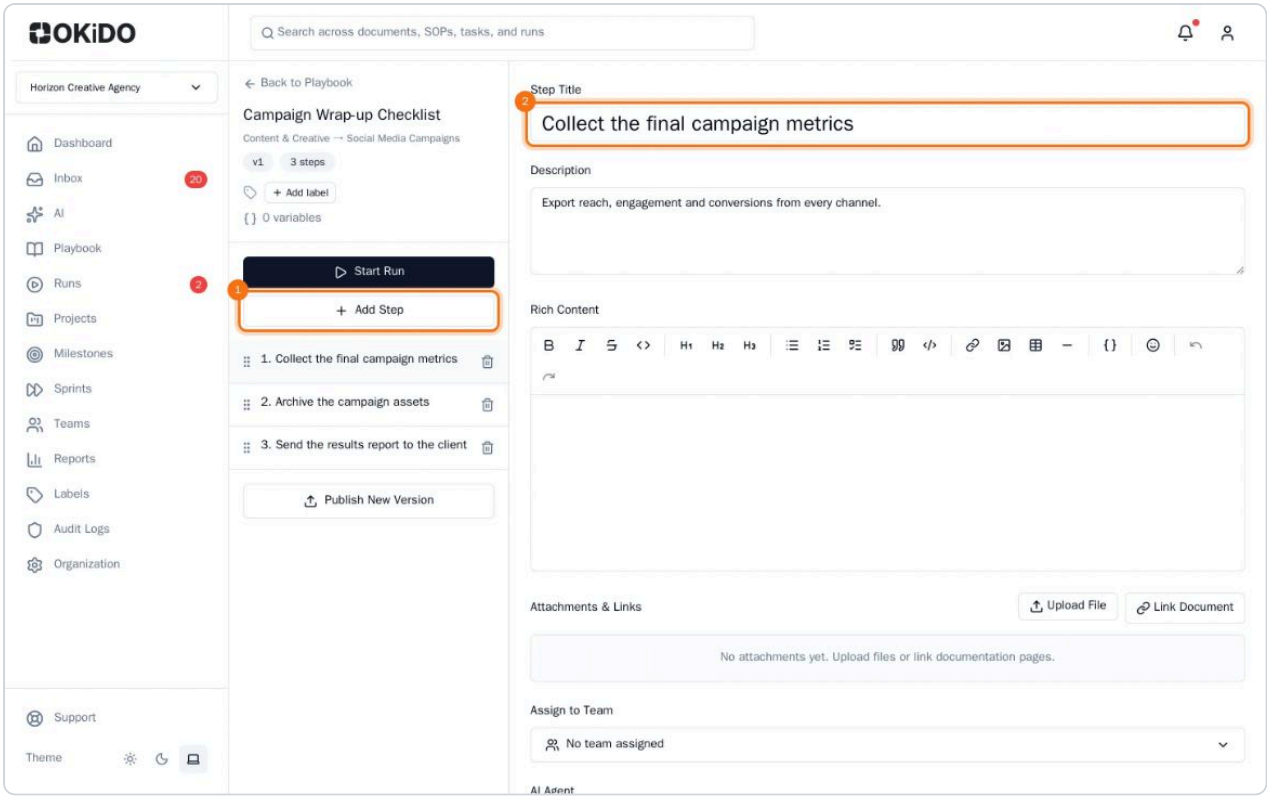


3. Enter a name under **SOP Name** and choose **Create SOP**.

The new SOP template opens in the editor. It has no steps yet.

Add the steps

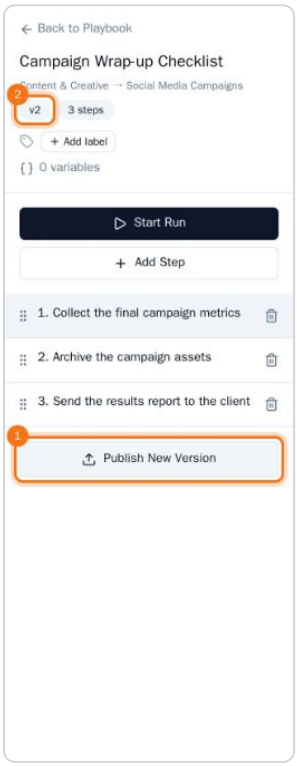
1. Choose **Add Step**. The new step appears in the list on the left and opens on the right.
2. Replace the title under **Step Title** with what the step is about. Add a short **Description** if it helps, and detailed instructions under **Rich Content**.
3. Repeat for every step, in the order people should do them.



You don't have to save: your changes are saved a moment after you stop typing. To edit a step later, select it in the list.

Publish a version

When the steps are ready, choose **Publish New Version** at the bottom of the step list.



The version number under the name goes up by one. Each run shows the version of the template it was started from, so you can tell which runs started before a change.

Next, add checklists, files and variables to the steps or start a run.

Add checklists, files and variables to steps

Give the steps of an SOP checklist items, files and linked documents, and add variables that people fill in during a run.

Available on: All plans | Who can do this: Everyone in the organization

A step often needs more than a title: a few things to tick off, the file or guide people work from, and the details that change every time, such as the client's name. You add them once in the SOP template, and every run started from it gets them.

Owners and admins can edit every SOP template. Members can edit an SOP template when their team has edit access to its process; otherwise they see it read-only.

Add checklist items

1. Open the SOP template from the **Playbook** and select a step in the list on the left.
2. Under **Checklist Items**, choose **Add Item** and type the item.
3. Tick **Required** next to the items that must be ticked before the step can be completed.
4. Repeat for the other items.

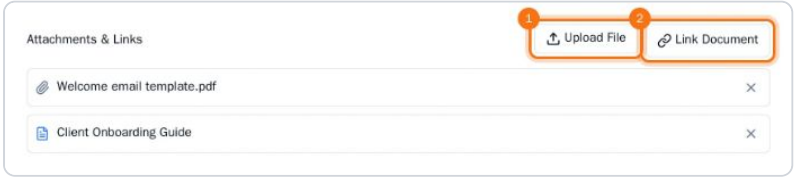


The list of steps shows how many checklist items a step has. In a run, the step can only be marked complete once its required items are ticked.

Attach files and link documents

Under **Attachments & Links**:

- Choose **Upload File** to attach a file from your computer.
- Choose **Link Document** and pick a document of the same process to link a Playbook page.

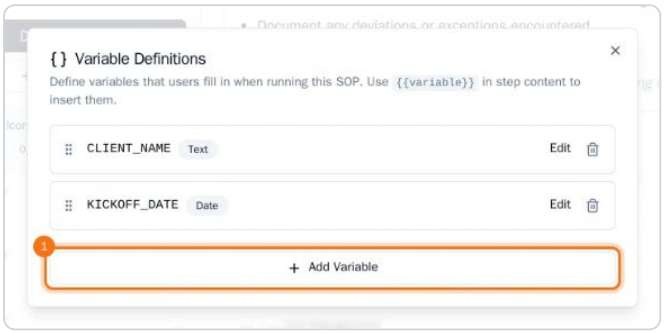


The file and the document are listed under the step, so whoever edits the SOP finds them in one place.

Add variables

Variables are the details people fill in when they run the SOP, such as a client's name or a kickoff date. You define them once for the whole template and place them in the text of any step.

1. Under the name of the template, choose the number of variables (for example "0 variables").
2. Choose **Add Variable**, enter a **Name** such as CLIENT_NAME and pick a **Type**, such as **Text** or **Date**.
3. Choose **Create Variable**. Repeat for each variable, then close the window.



4. Select a step and click in its **Rich Content** where the value should go. Type `{{`, then pick the variable from the list.

The variable appears as a purple label in the text. During a run it becomes a field: what someone fills in there is used everywhere the same variable appears. See Complete the steps of a run.

Add an approval gate to a step

Make a step of an SOP wait for approval from the people you choose before the run can go on.

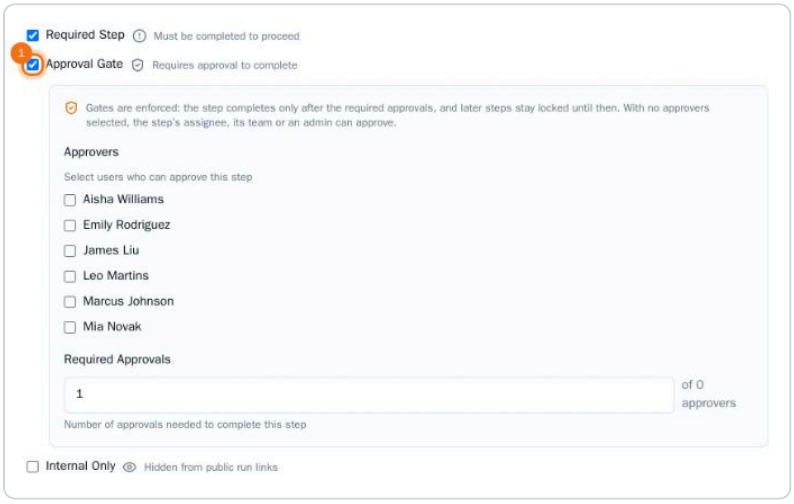
Available on: All plans | Who can do this: Everyone in the organization

Some steps need a sign-off, such as the final check before a deliverable goes to the client. An approval gate makes that step wait until enough of the chosen approvers approve it. Until then, the steps after it stay locked.

Owners and admins can edit every SOP template. Members can edit an SOP template when their team has edit access to its process.

Turn on the gate

1. Open the SOP template from the **Playbook** and select the step that needs approval.
2. Tick **Approval Gate**.



The step now shows a **Gate** label in the list of steps.

Choose the approvers

1. Under **Approvers**, tick the people who may approve the step.
2. Under **Required Approvals**, enter how many of them have to approve. With two approvers and 1 required approval, either of them can give the sign-off.



Your changes are saved automatically. Every run started from the template from now on waits at this step until it has enough approvals. If you choose no approvers, the step's assignee, its team or an admin can approve it.

To learn how approvers decide, see Approve a step in a run.

Assign steps to teams and AI agents

Decide who does each step of an SOP: a team, or an AI agent that carries the step out on its own.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Each step of an SOP template can say who does it. Give a step to a team, and it lands with someone of that team in every run. Give it to an AI agent, and the agent does the step by itself when a run gets there, such as a QA agent that checks a deliverable for accessibility.

To change a template you need permission to edit it: owners and admins always have it, members when their team has full access to the folder (see Give teams access to a folder).

Give a step to a team

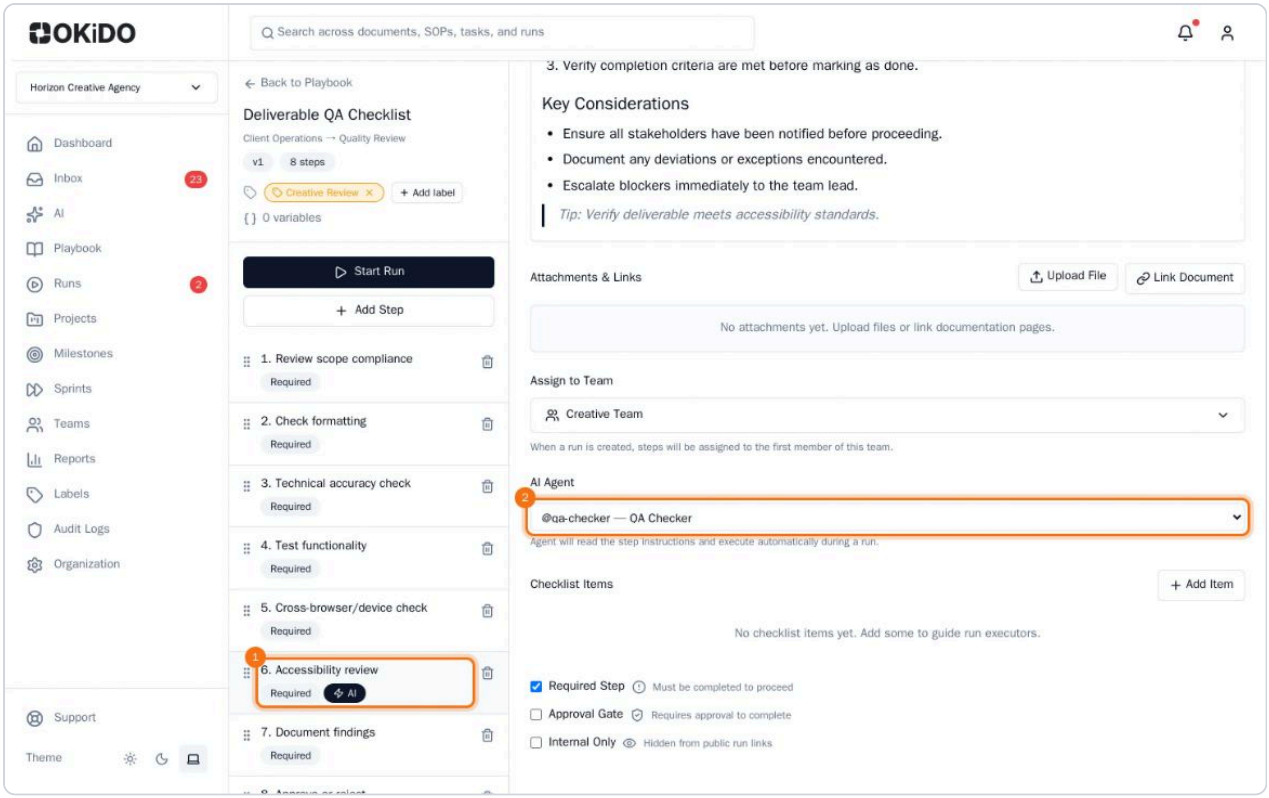
1. Open the SOP template and choose the step in the list on the left.
2. Under **Assign to Team**, choose the team.



The change is saved a moment later. When a run is created, the step is assigned to the first member of the team. Choose **No team assigned** to take the team off the step again.

Give a step to an AI agent

1. Choose the step in the list on the left.
2. Under **AI Agent**, choose the agent.



The step gets an **AI** label in the list. In a run, the agent reads the step's instructions and carries the step out on its own. Choose **No agent assigned** to give the step back to people.

> **Tip:** Write clear instructions in the step for an agent: it follows them as written. See Create an SOP template.

Start a run

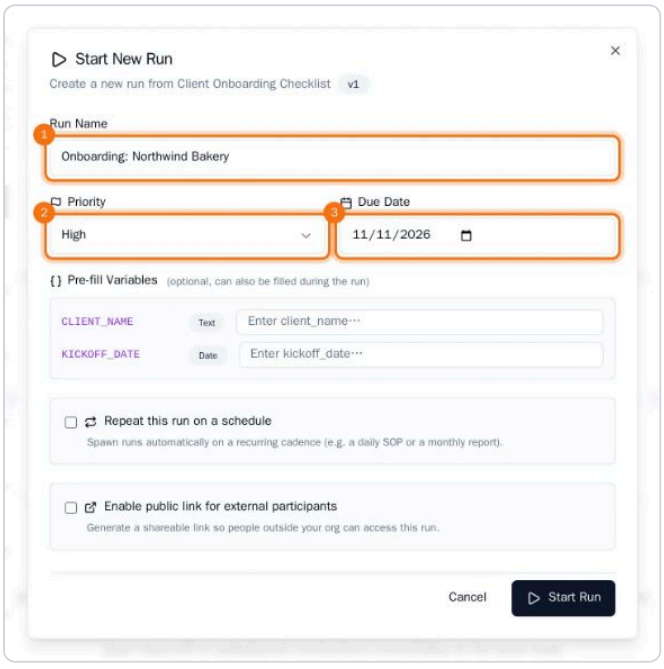
Start a run from an SOP template with its own name, priority and due date, and fill in its variables right away.

Available on: All plans | Who can do this: Everyone in the organization

A run is one pass through an SOP template, for example the onboarding of one new client. It gets its own copy of the template's steps, so your team can work through them while the template stays as it is.

Start a run

1. Open the SOP template in the **Playbook**. (On the **Runs** page, **Create Run** takes you there too.)
2. Choose **Start Run**.
3. Under **Run Name**, replace the suggested name with one you will recognize, such as the client's name.
4. Choose a **Priority** and, if the run has a deadline, a **Due Date**.

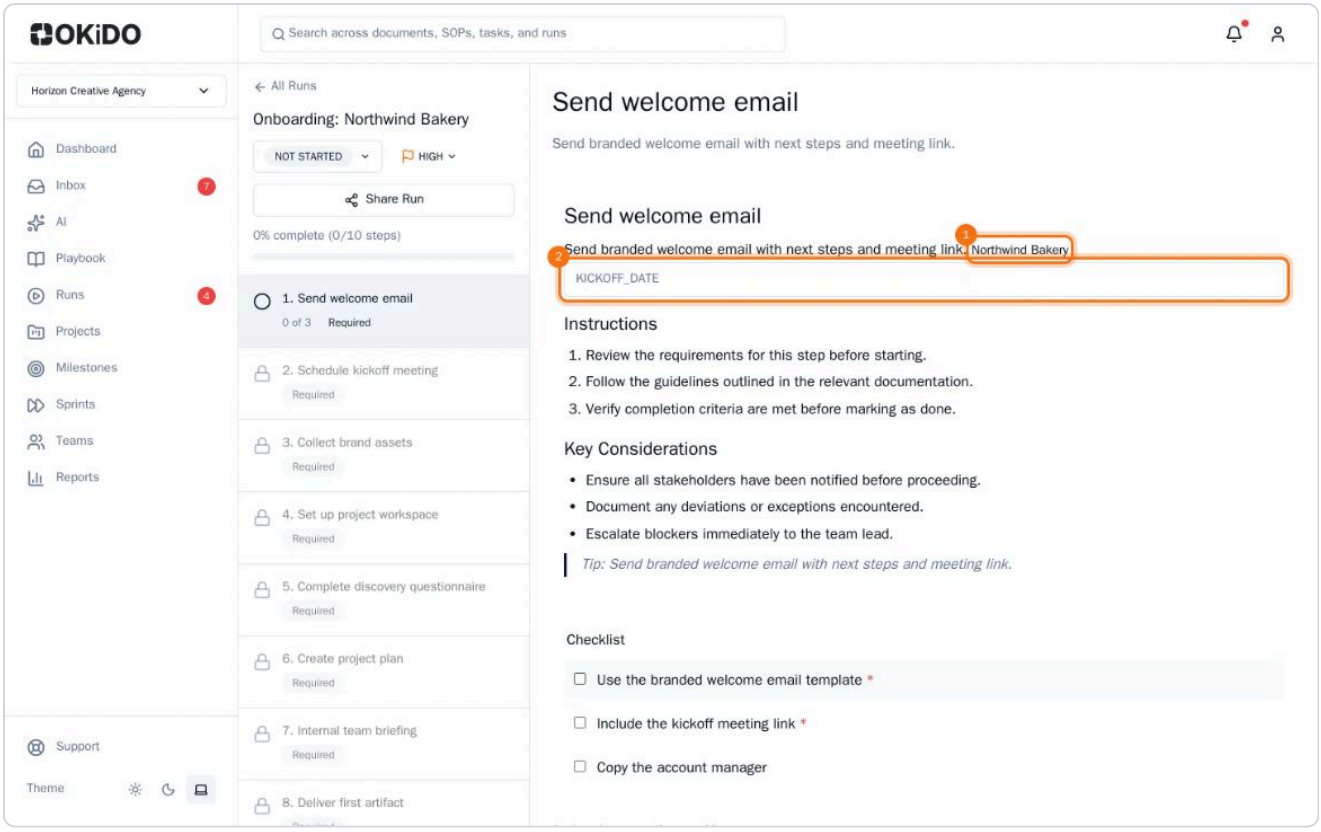


5. If the template has variables, fill in the ones you already know under **Pre-fill Variables**. Leave the others empty: they can be filled in during the run.



6. Choose **Start Run**.

The run opens with all the steps of the template. The values you filled in already show in the step text.



You find the run on the **Runs** page, under **SOP Runs**.

> **Tip:** In the same window you can make the run repeat on a schedule or share it with a customer.

Complete the steps of a run

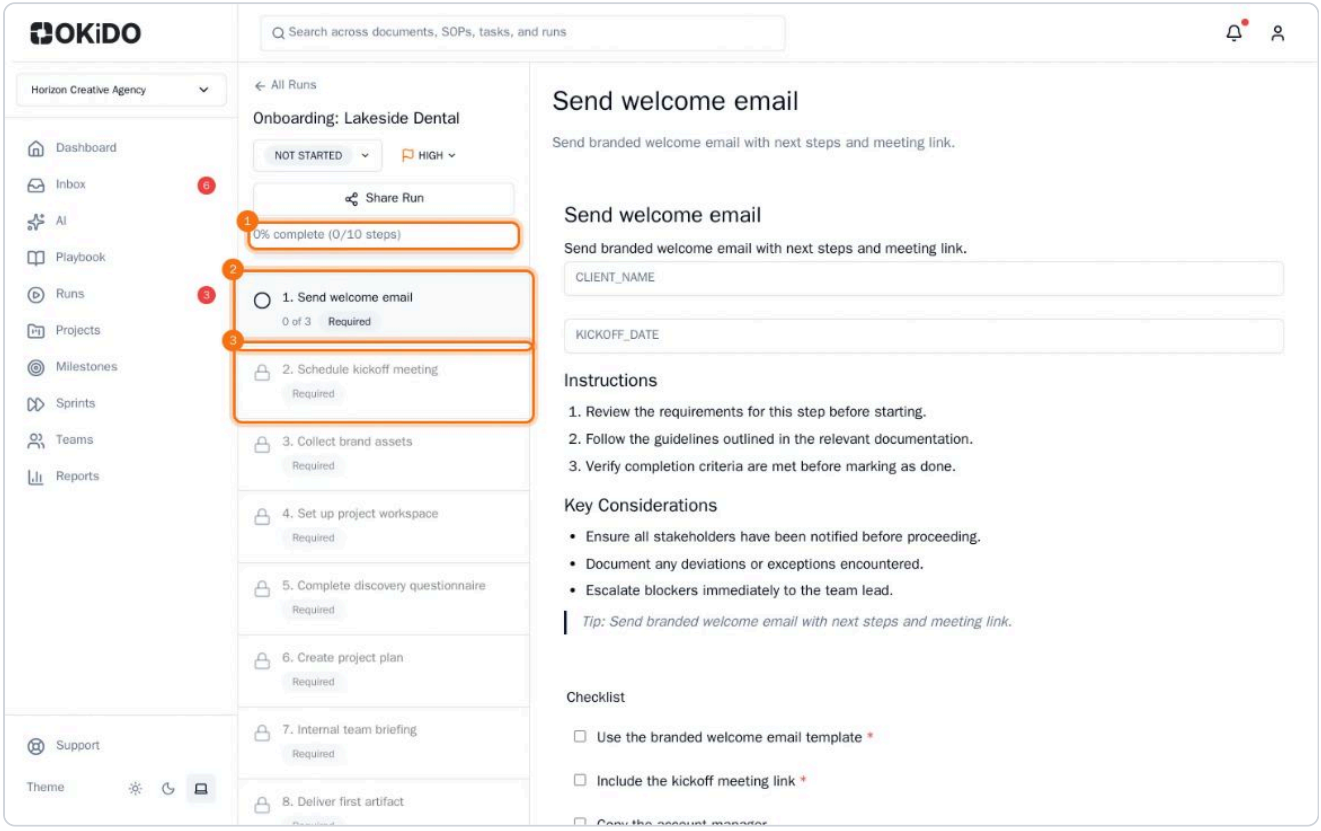
Work through a run step by step: fill in its fields, tick its checklist and mark each step complete.

Available on: All plans | Who can do this: Everyone in the organization

A run lists its steps on the left. Select a step to see its instructions, fields and checklist on the right, and work through the steps from top to bottom.

Open the run

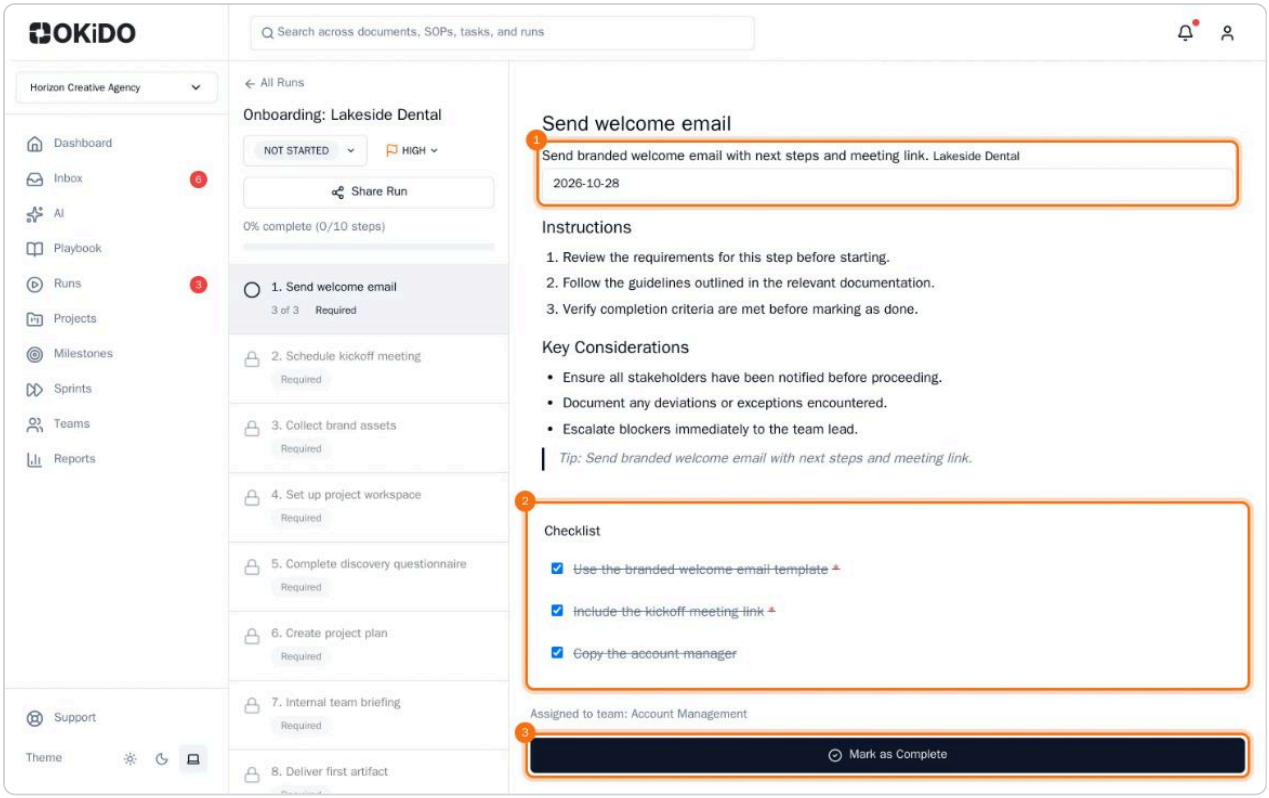
Go to **Runs** and select the run.



The run opens at the first step that is not done yet. Above the steps you see how far the run is. A lock in front of a step means it has to wait: the required steps above it come first.

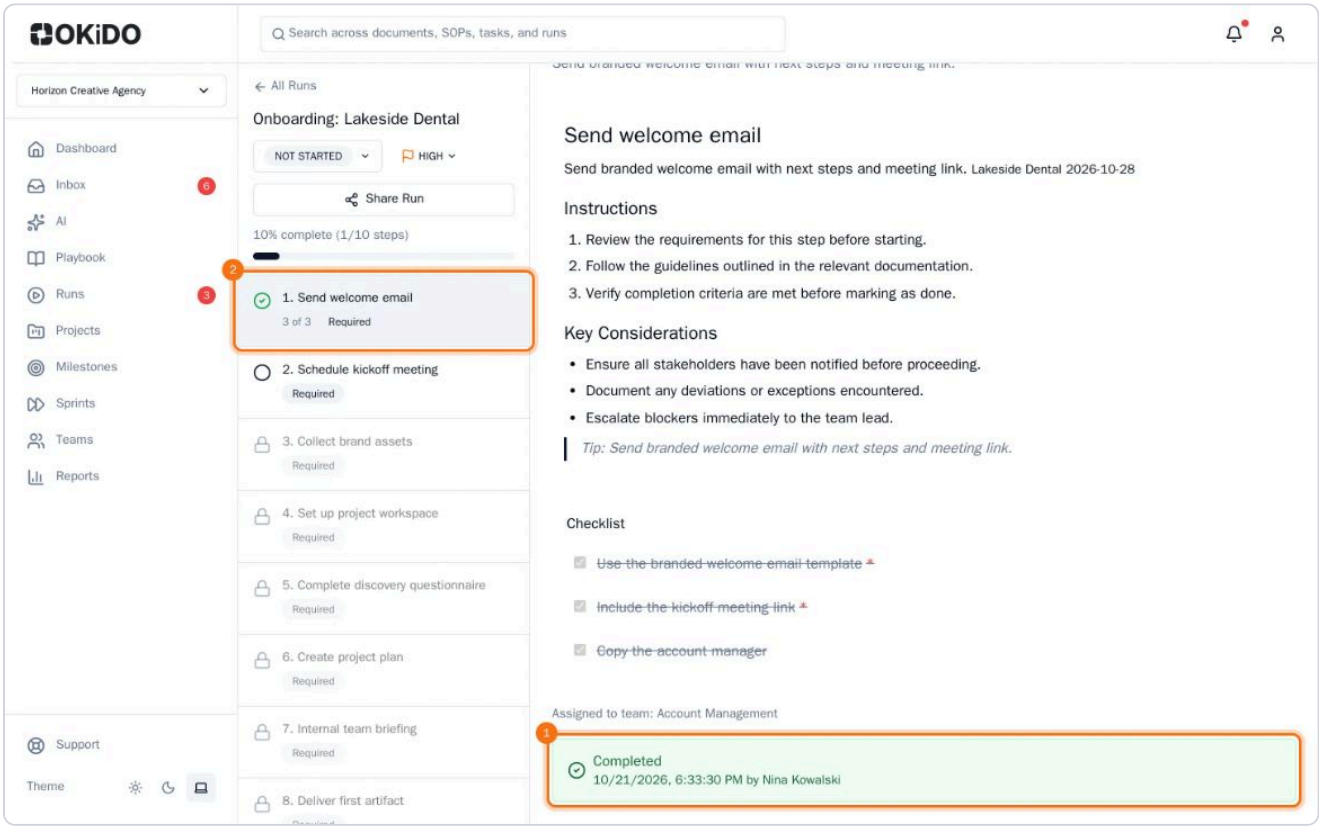
Work through a step

1. Fill in the fields in the step text, such as the client's name or a date. What you enter is saved right away.
2. Tick the items under **Checklist** as you do them. Items with a red star are required.



3. Choose **Mark as Complete**.

The step now shows **Completed**, with the date, the time and your name. The progress goes up and the next step unlocks.



Mark as Complete stays unavailable while a required checklist item is not ticked or a required step above is not done yet. A step with an approval gate completes through its approvers instead, see

Approve a step in a run.

When the last step is done, the run is completed.

Approve a step in a run

Approve, reject or request changes on a run step that waits for your approval, so the run can go on.

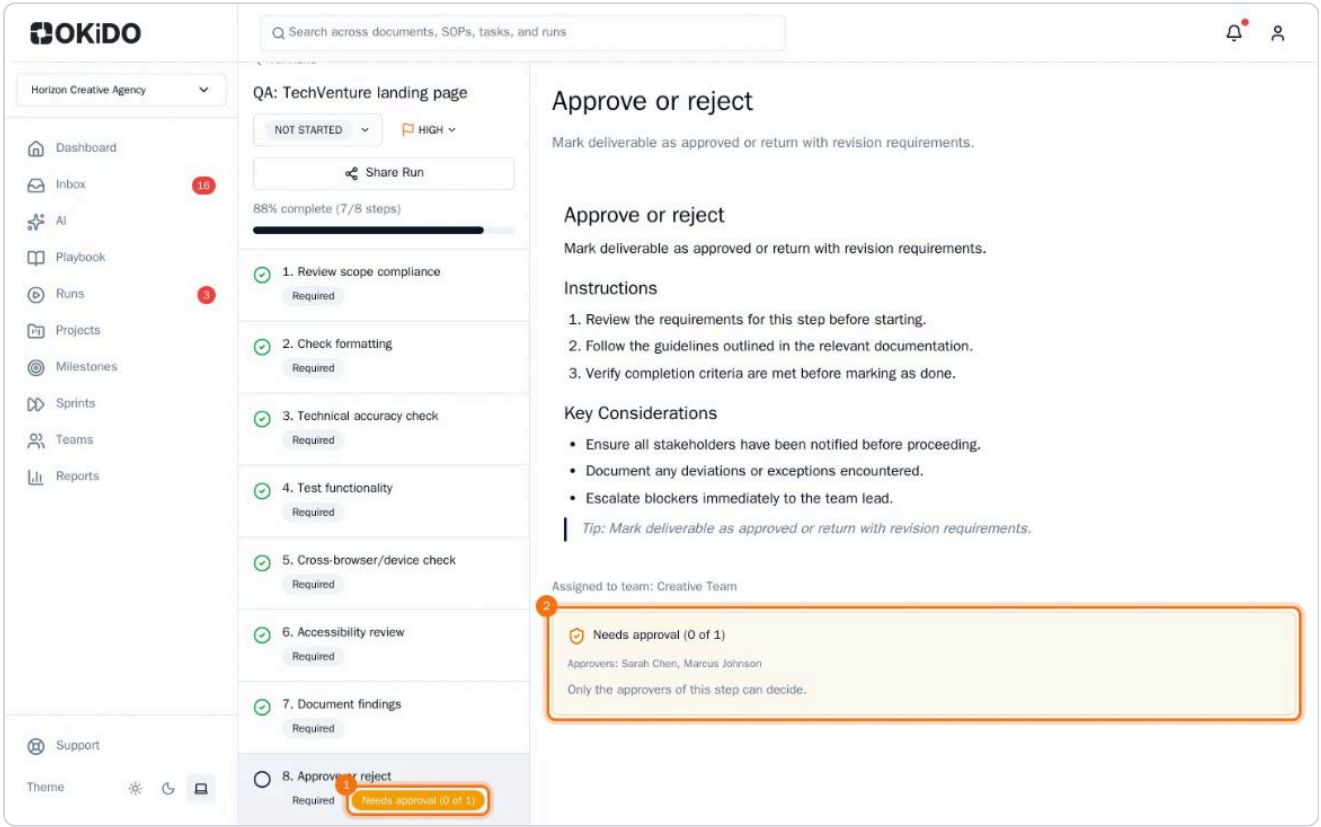
Available on: All plans | Who can do this: Everyone in the organization

A step with an approval gate waits for its approvers. Until enough of them approve, nobody can mark the step complete and the steps after it stay locked. To set up such a step, see Add an approval gate to a step.

See what a run waits for

When a run reaches a step with a gate, its approvers get a notification in their **Inbox**, under **Approvals Pending**.

Everyone can see on the run what it waits for. In the list of steps, the step shows how many approvals it has and needs. Select the step to see who can approve it and the decisions so far.

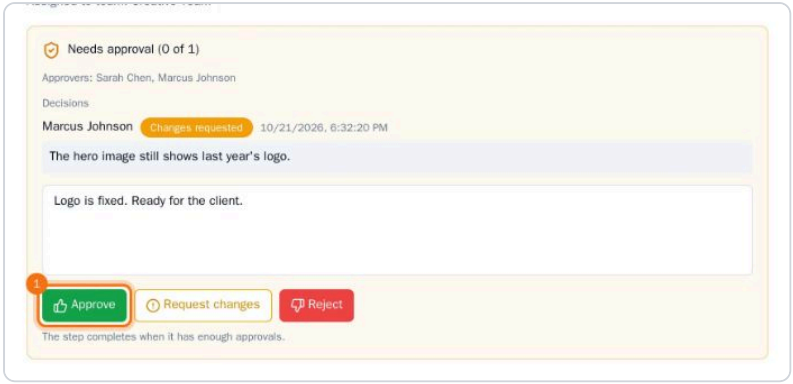


Approve, reject or request changes

Only the approvers of a step can decide.

1. Open the run and select the step that waits for your approval.
2. Add a note if you like.

3. Choose **Approve**, **Request changes** or **Reject**.



When the step has enough approvals, it completes on its own and the next steps unlock. If it was the last open step, the run is completed as well.

Request changes and **Reject** keep the step waiting. Your decision and note show on the step, and the person who started the run gets a notification. Changed your mind? Choose another button: your new decision replaces the old one.

Track and manage runs

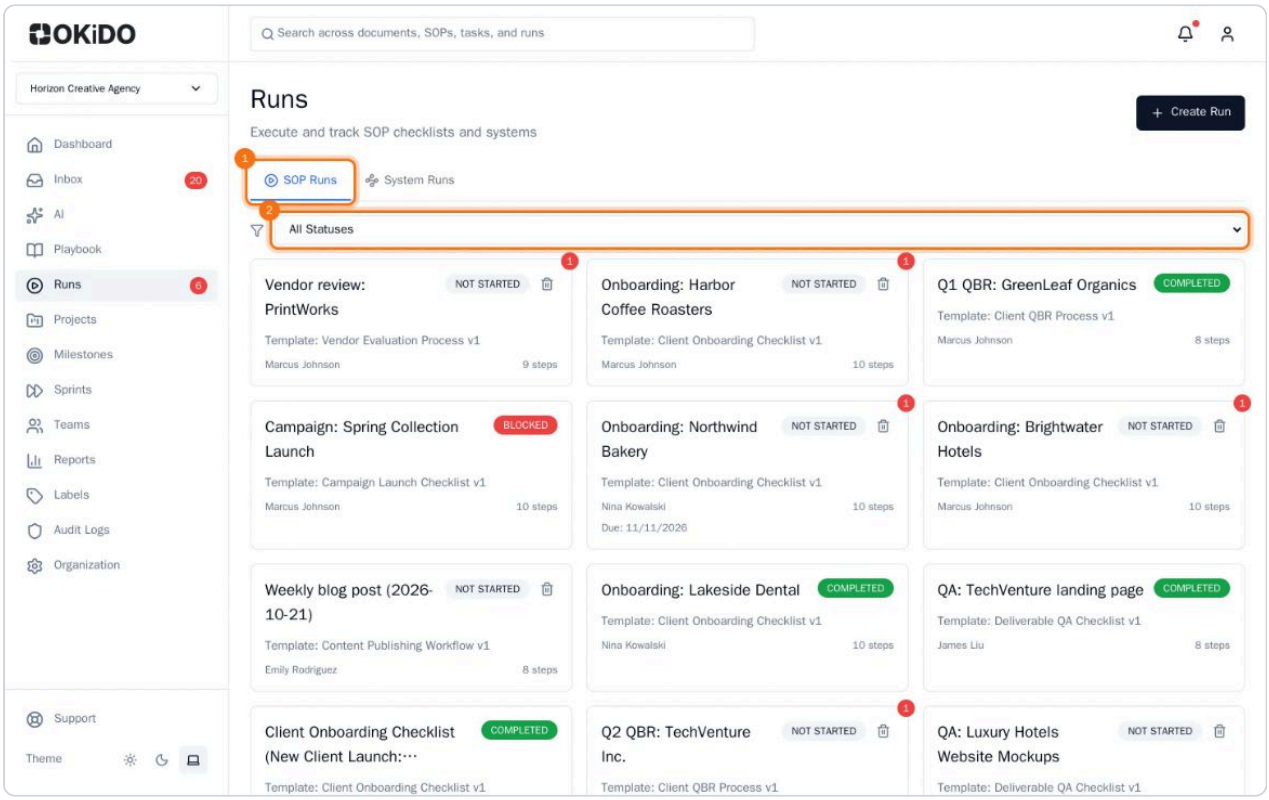
Find runs by status, change a run's status or priority, and cancel or delete runs you no longer need.

Available on: All plans | Who can do this: Everyone in the organization

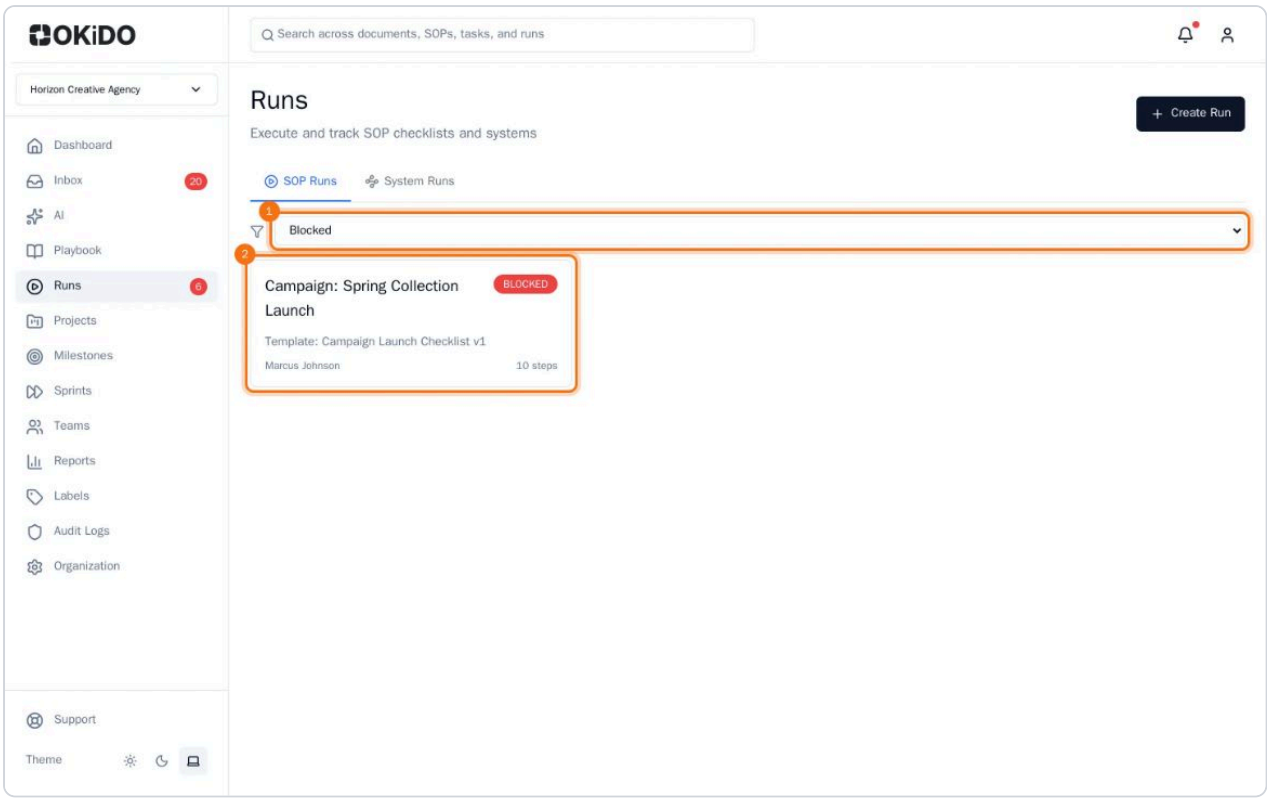
All runs of your organization are on the **Runs** page. There you see at a glance which runs are under way, which are stuck and which are done.

Find a run

1. In the menu on the left, choose **Runs**. The **SOP Runs** tab shows every run as a card, with its status, the template and version it was started from, who started it, its number of steps and its due date.



2. To see only runs with a certain status, choose it in the list above the cards, for example **Blocked**.

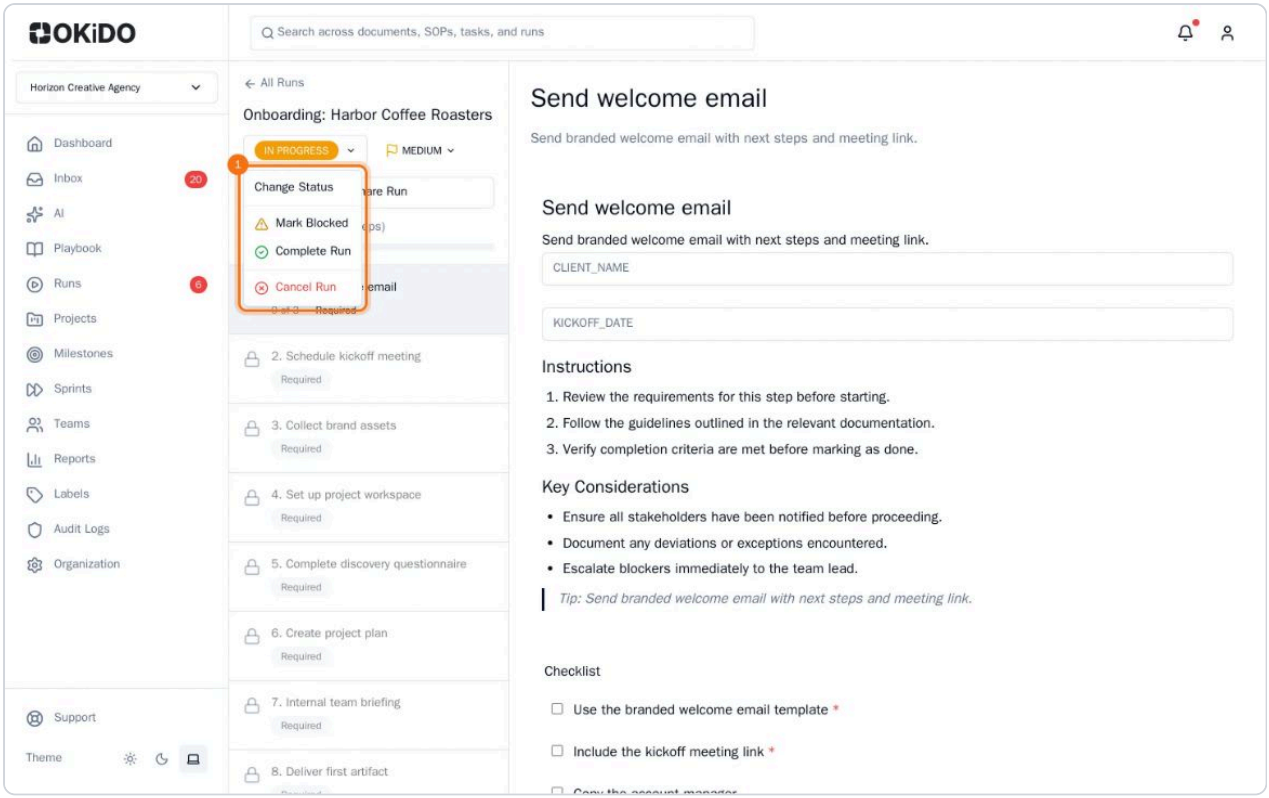


Select a card to open the run.

Change the status or the priority

The person who started a run can change its status and priority, and so can owners and admins. Everyone else sees them without a menu.

1. Open the run.
2. Choose the status under the run's name, and pick what to do:
   - **Start Run** for a run that has not started yet,
   - **Mark Blocked** when the run is stuck, then **Resume Run** to carry on,
   - **Complete Run** to finish it.



3. To change the priority, choose the priority next to the status and pick another one.

Cancel or delete a run

- To stop a run you no longer need, open it, choose its status, then **Cancel Run**. The run keeps its history and shows as cancelled; its steps can no longer be completed.
- Owners and admins can delete a run that has not started. On the **Runs** page, choose **Delete run** (the bin on the run's card), then **Delete Run**. This cannot be undone.

Schedule a recurring run

Let runs of an SOP start by themselves on a schedule, such as every Monday.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

For work on a fixed rhythm, such as a weekly content plan or a monthly report, OKiDO can start the runs for you. You set up the schedule once, when you start a run.

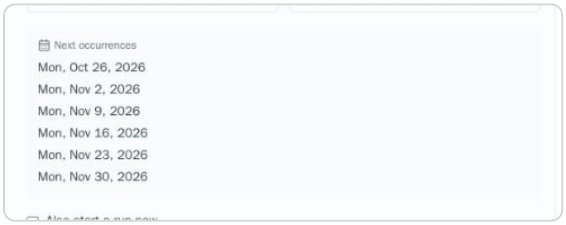
Recurring runs are available on the Starter, Pro and Business plans.

Set up the schedule

1. Open the SOP template in the **Playbook** and choose **Start Run**.
2. Enter the **Run Name** and choose the **Priority**. Every run the schedule starts gets this name, followed by its date.
3. Tick **Repeat this run on a schedule**.



4. Under **Schedule**, pick one of the suggestions below the field, or type your own schedule the same way, in English.
5. If the schedule should start later or stop on a certain day, fill in **Start Date** and **End Date (optional)**.
6. Check the dates under **Next occurrences**: these are the next days a run starts.



7. To start the first run right away as well, tick **Also start a run now**.
8. Choose **Schedule**.

From now on, a new run starts on every date of the schedule, with the priority you chose. If you ticked **Also start a run now**, the first run opens right away.

Share a run with a customer

Give people outside your organization a link to follow and complete a run, with an optional password and end date.

Available on: Starter · Pro · Business | Who can do this: Owner, Admin

Some runs involve people outside your team, such as a client who has to send their logo files during onboarding. Share the run with a public link: they can follow its progress and complete steps without an OKiDO account.

Only owners and admins can share a run. Public run links are available on the Starter, Pro and Business plans.

Keep internal steps out of the link

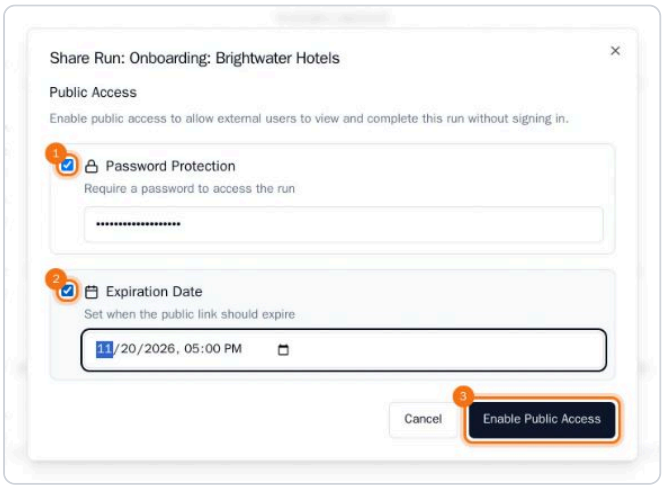
Steps that are only for your team, such as an internal briefing, can be hidden from the link. Do this in the SOP template, before you start the run:

1. Open the SOP template and select the step.
2. Tick **Internal Only**.

The step gets an **Internal** label in the list of steps. Runs started from the template from now on leave this step out of their public link.

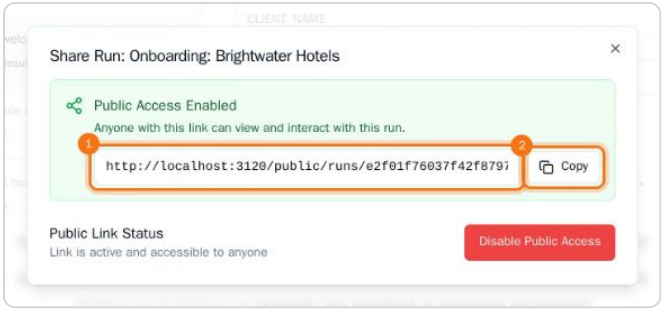
Share the run

1. Open the run and choose **Share Run**.
2. To protect the link, tick **Password Protection** and enter a password.
3. To make the link stop working at a certain moment, tick **Expiration Date** and choose the date and time.



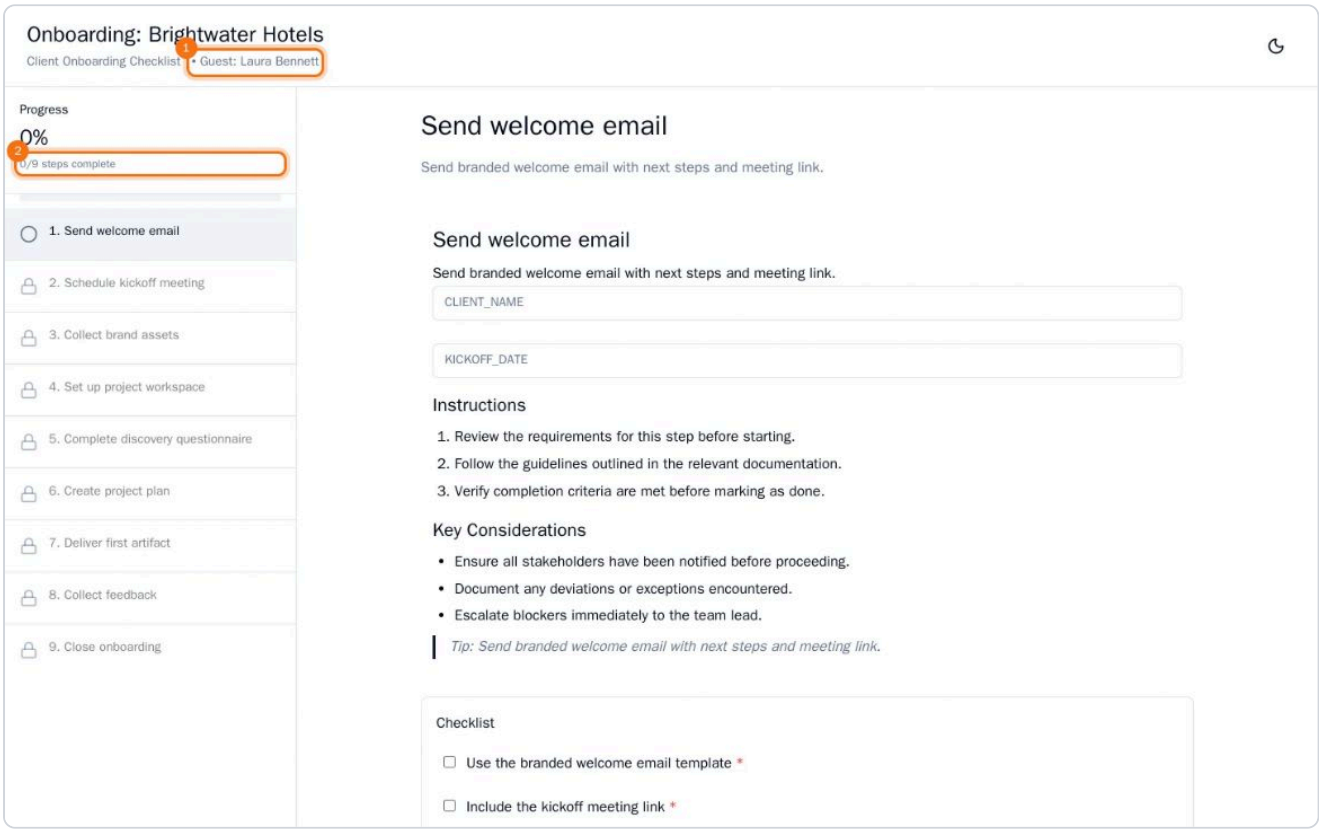
4. Choose **Enable Public Access**.

5. Choose **Copy** and send the link to your customer, with the password if you set one.



What your customer sees

When your customer opens the link, they enter the password (if you set one), then their name and email address, and agree to the terms. They then see the run with its progress and all its steps except the internal ones. They can tick checklist items and mark steps as complete, just like your team.



Steps your customer completes show their name in the run.

Turn the link off

Open the run, choose **Share Run**, then **Disable Public Access**, and confirm with **Disable**. The link stops working right away.

CHAPTER 10

Systems and decision trees

Build a system

Run a system

Build a decision tree

Run a decision tree

Answer a decision tree for a running system

Read this chapter online

okido.io/en/docs/systems-decision-trees

Scan the code or open the link to read this chapter online, where it is always up to date.

Build a system

Chain SOP checklists, approvals, tasks and decision trees into one flow that OKiDO runs step by step.

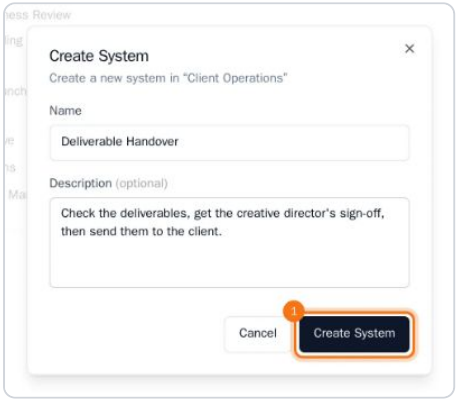
Available on: All plans | Who can do this: Owner, Admin

A system links the parts of a bigger process into one flow, for example a client onboarding: first the onboarding checklist, then the creative director's sign-off, then the kickoff call. When you run it, OKiDO starts each step as soon as the step before it is done. You build a system once on a canvas, check it and publish it.

Only owners and admins can publish a system.

Create a system

1. In the menu on the left, choose **Playbook** and open the folder the system belongs in.
2. Choose **Add** at the end of the folder, then **System**.
3. Enter a **Name** and, if you like, a **Description**.



4. Choose **Create System**.

The editor opens, with a **Start** node on the canvas.

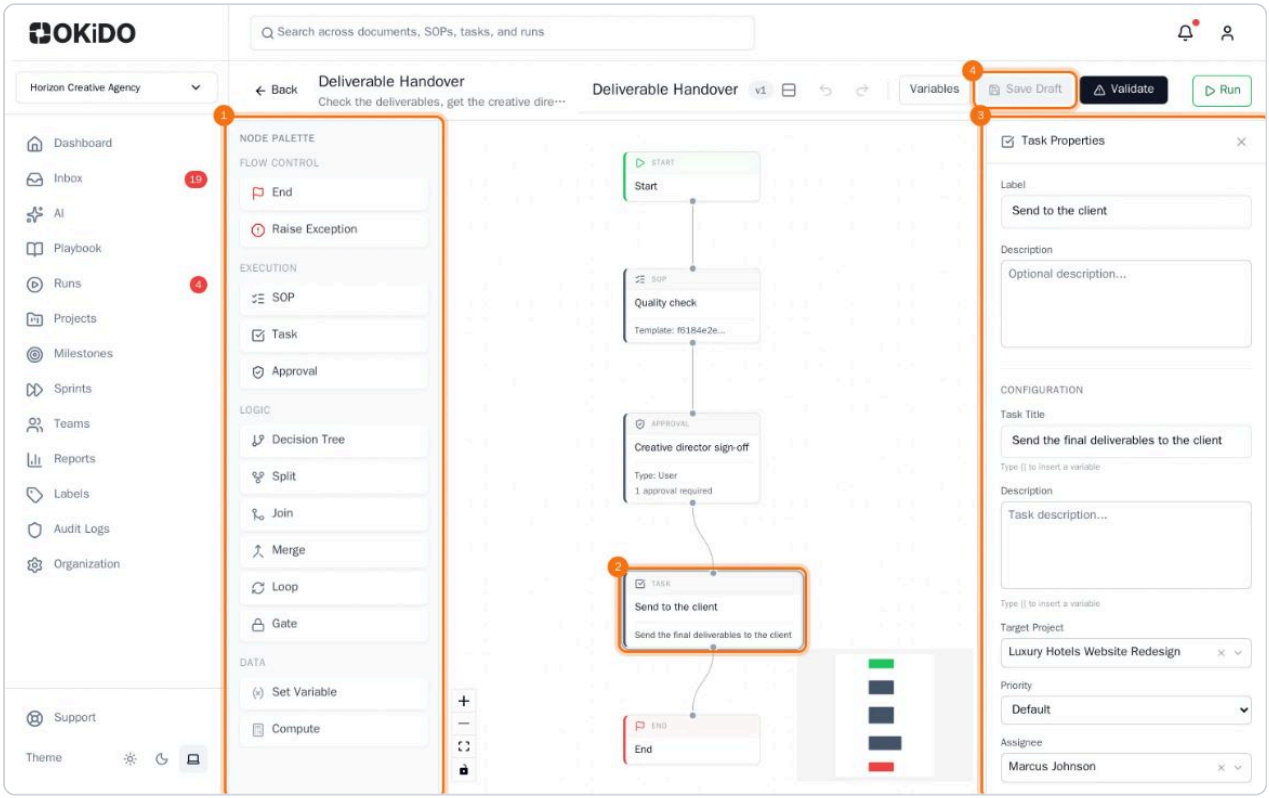
Add and connect the steps

1. In the **Node Palette** on the left, choose a node to add it to the canvas, for example **SOP**, **Approval** and **Task**. Add an **End** node too: every system needs one.
2. Drag the nodes into the order they run in, from top to bottom.
3. Drag from the dot at the bottom of a node to the dot at the top of the node that comes next. Start at the **Start** node and end at the **End** node.

The buttons in the lower-left corner of the canvas zoom in and out, or fit the whole system on the screen.

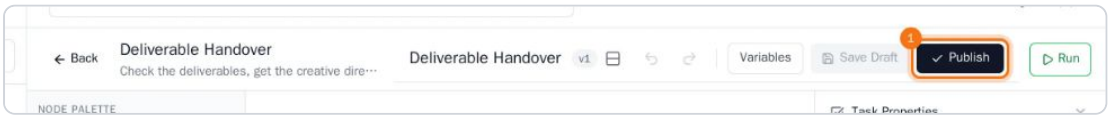
Set up each step

1. Select a node on the canvas. Its properties open on the right.
2. Give the node a **Label**, the name it has in the flow, and fill in its settings:
   - **SOP**: the **SOP Template** that starts as a run.
   - **Approval**: the **Approver** (or, under **Approver Type**, a team) and the number of **Required Approvals**.
   - **Task**: the **Task Title**, the **Target Project** the task is created in, and its **Assignee**.
   - **Decision Tree**: the **Decision Tree** someone answers, and the **Assignee** who answers it. Each outcome of the tree gets its own way out of the node.
3. To keep your work without publishing it yet, choose **Save Draft**.



Validate and publish

1. Choose **Validate**. OKiDO saves the draft and checks the system: every node needs its settings and has to be connected. If something is missing, a list shows what to fix.
2. When the system is valid, the button changes to **Publish**. Choose **Publish**.



The system is published and ready to run: see Run a system.

> **Tip:** To change a published system, open it and choose **Edit System**. When you publish again, the system gets a new version. Runs that have already started keep the version they started with.

Run a system

Start a run of a published system, follow it node by node, approve its sign-offs and cancel it when it is no longer needed.

Available on: All plans | Who can do this: Everyone in the organization

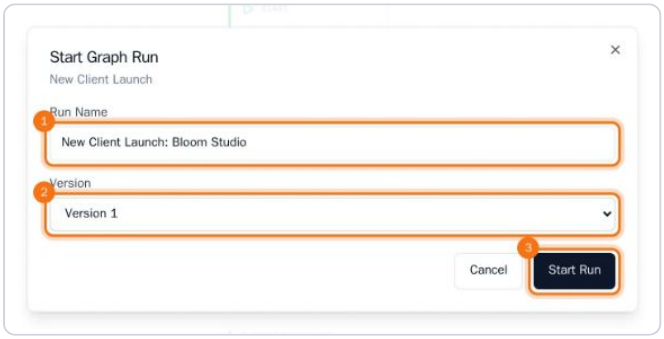
A run is one pass through a system, for example the launch of one new client. OKiDO works through the nodes in order: it starts the SOP runs, creates the tasks, and waits wherever a person has to approve or decide.

Start a run

1. In the **Playbook**, open the folder and choose the system. You see its flow and, on the right, its **Recent Runs**.
2. Choose **Run System**.



3. Enter a **Run Name**, such as the client's name. The newest published **Version** is already chosen.

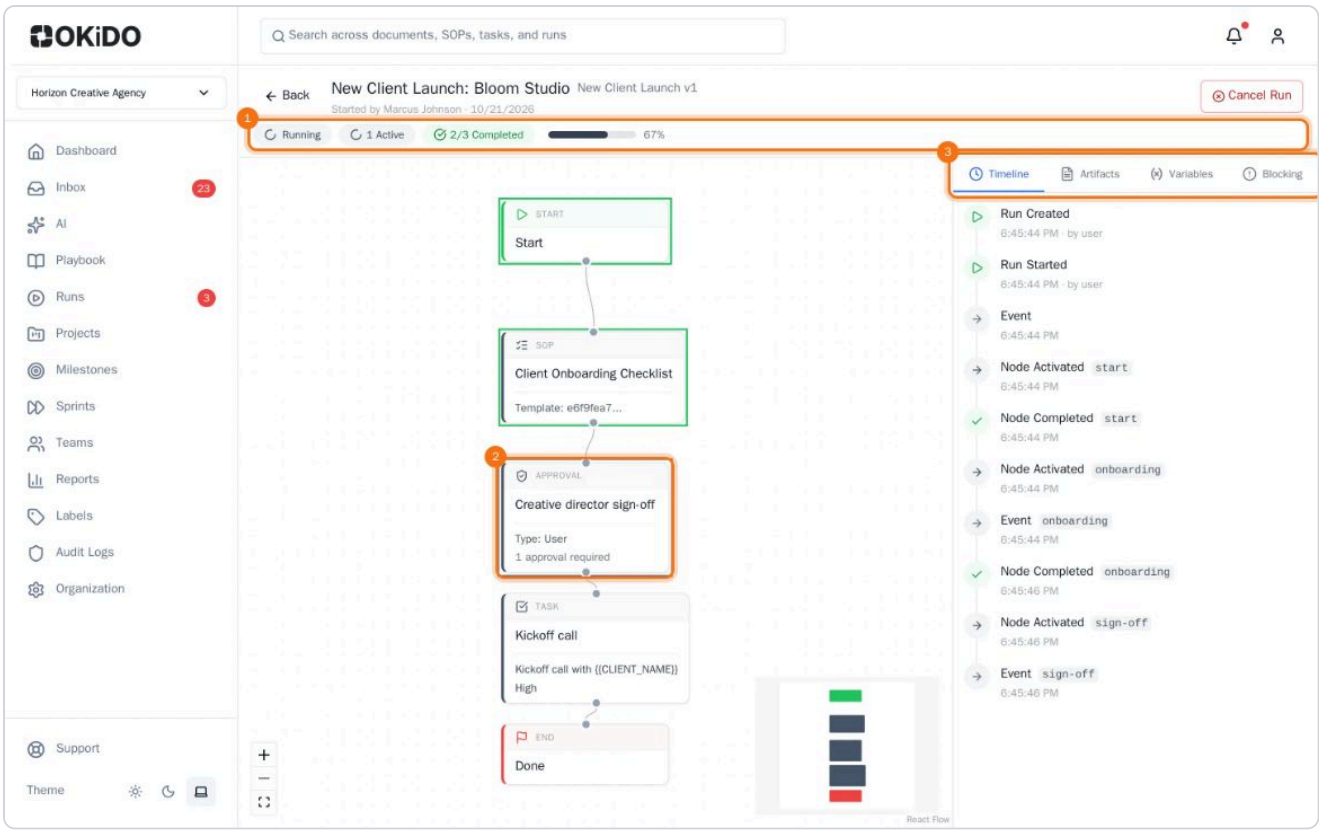


4. Choose **Start Run**.

The run opens and its first nodes start right away. You find every run on the **Runs** page, under **System Runs**.

Follow a run

The run shows the system with its progress: a green frame around the nodes that are done, and a pulsing ring around a node that waits for a person. Above it you see the run's status and how far it has come.



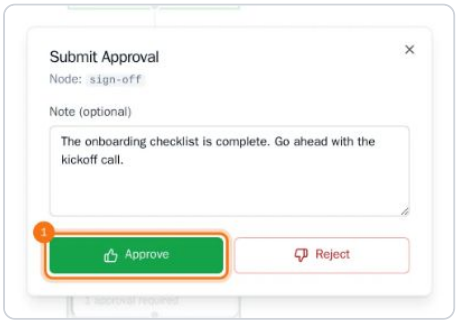
The tabs on the right show more:

- **Timeline**: everything that happened in the run, with the time.
- **Artifacts**: what the run created, such as SOP runs and tasks.
- **Variables**: the values the run works with.
- **Blocking**: why a node is waiting.

Approve or reject a step

When a run reaches an **Approval** node, the approver gets a notification in the **Inbox**, under **Approvals Pending**. The notification opens the run.

1. In the run, choose the approval node with the pulsing ring.
2. Add a note if you like.
3. Choose **Approve** or **Reject**.



After an approval the run goes on with the next node. After a rejection the run stops at this node.

The approver set on the node (or a member of the approving team) can approve or reject it, and so can owners and admins.

Cancel a run

1. Open the run and choose **Cancel Run** at the top.
2. Confirm with **Cancel Run**.

The run stops and shows as cancelled. Owners, admins and the person who started the run can cancel it.

Build a decision tree

Turn a decision your team makes again and again into a guided flow of questions, branches and outcomes.

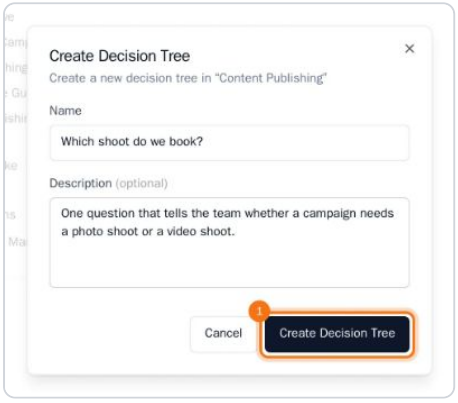
Available on: All plans | Who can do this: Owner, Admin

A decision tree asks a few questions and, depending on the answers, leads to an outcome: which campaign package fits a client, or whether a campaign needs a photo or a video shoot. Everyone who runs it reaches the same decision in the same way, and every run is logged.

You build a decision tree in a process of the Playbook: questions that store their answers in variables, outcomes, and branches that lead from one to the next.

Create a decision tree

1. In the **Playbook**, open the folder and the process the tree belongs to.
2. Choose **Add** at the end of the process, then **Decision Tree**.
3. Enter a **Name** and, if you like, a **Description**.



4. Choose **Create Decision Tree**.

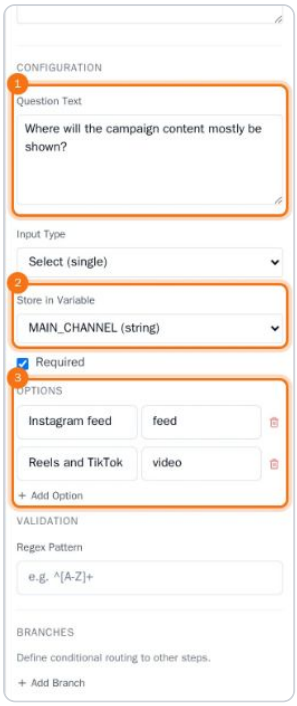
The editor opens, with a **Start** step on the canvas.

Add a question

Each question stores its answer in a variable, so the branches can check it. Declare the variable first.

1. Choose **Variables**, type a key for the answer in capitals (for example MAIN_CHANNEL), and choose **Add Variable**. Close the panel.
2. In the **Step Palette** on the left, choose **Question**, then select the new step on the canvas.
3. Fill in its **Label** and its **Question Text**.

4. Choose an **Input Type**, for example **Select (single)**, and under **Store in Variable** the variable for the answer.
5. For a choice, choose **Add Option** for each answer and fill in its label and value.



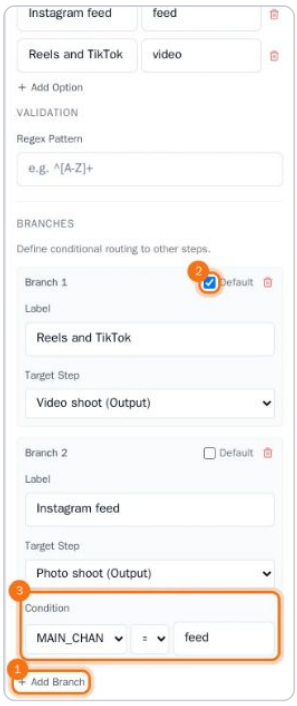
Add a question in the same way for every question of the tree.

Add the outcomes

1. In the **Step Palette**, under **Result**, choose **Output** for each possible outcome.
2. Select each outcome and give it a **Label**, such as "Photo shoot". Under **Output Fields**, fill in the result it gives.

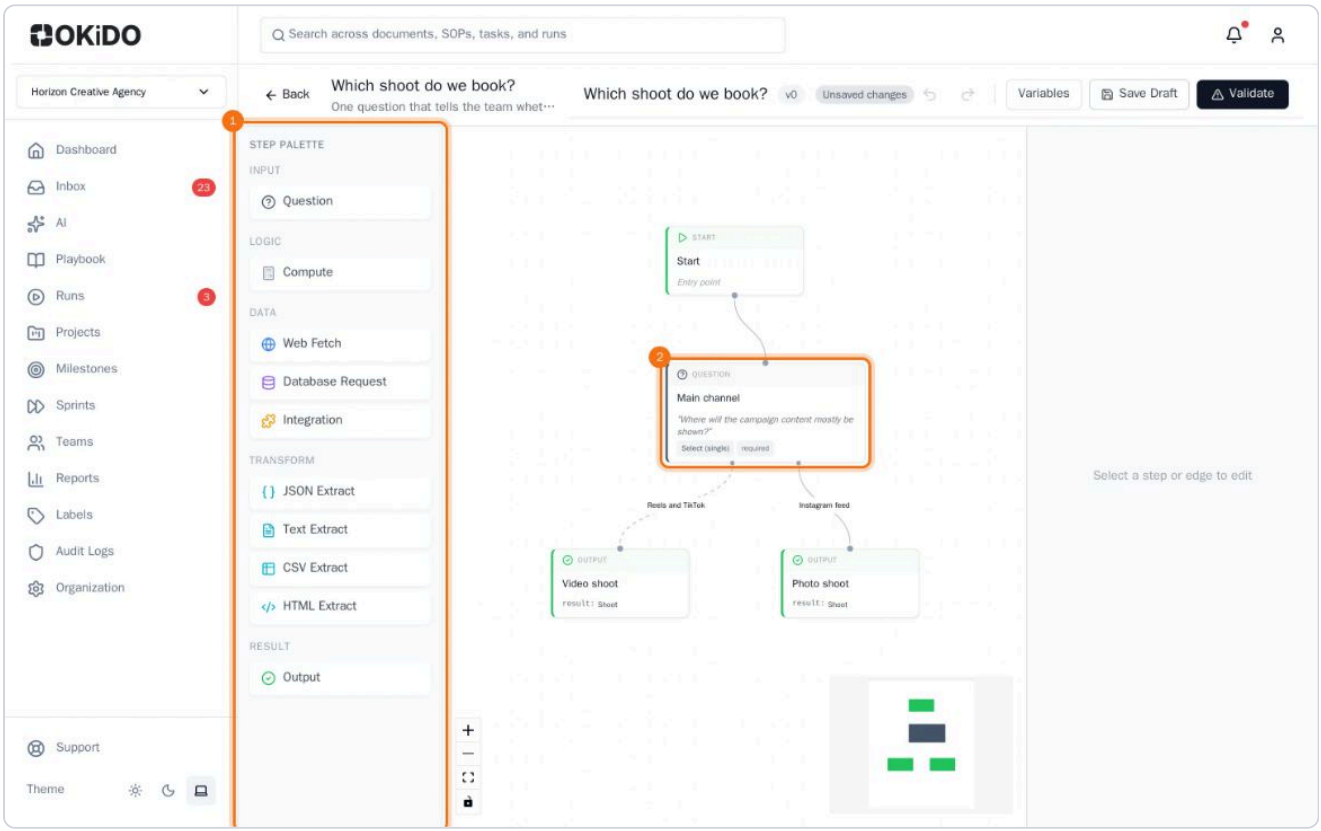
Connect the steps

1. Drag the steps into place on the canvas: the first question under the **Start** step, and the outcomes under the question.
2. Drag from the dot at the bottom of the **Start** step to the dot at the top of the first question.
3. Select the question. Under **Branches**, choose **Add Branch** for each way the tree can go on.
4. For each branch, choose its **Target Step**, the next question or an outcome. Under **Condition**, choose the variable and enter the value of the answer that leads there.
5. Tick **Default** on the branch to take when no other branch matches. The first branch you add is the default.



6. Choose **Save Draft**.

The branches show as lines on the canvas once you save the tree and open it again.



Validate and publish

1. Choose **Validate**. OKiDO saves the draft and checks the tree: every question needs a text, a declared variable and a branch, and the tree needs at least one outcome. If something is

missing, a list shows what to fix.

2. When the tree is valid, the button changes to **Publish**. Choose **Publish**.

The tree is published and ready to run: see Run a decision tree. A system can also ask someone to answer it (see Build a system).

Run a decision tree

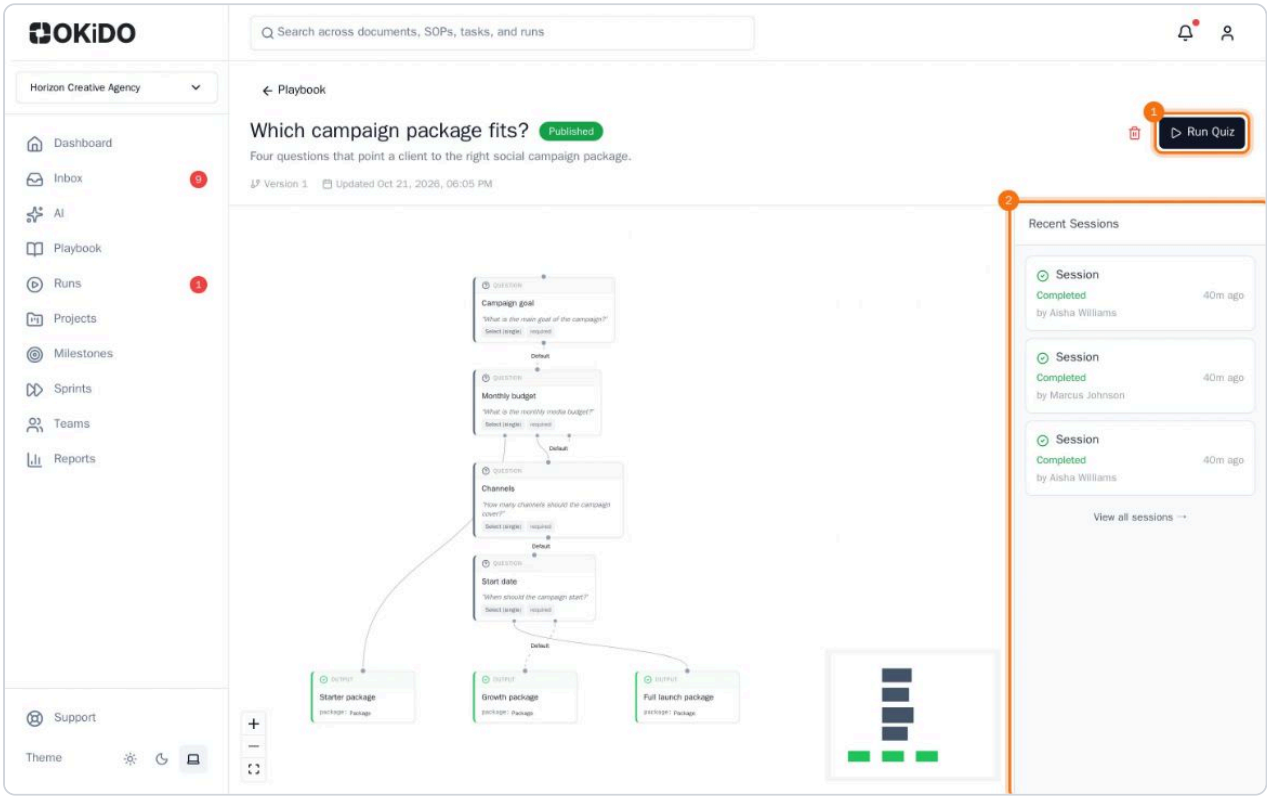
Answer a decision tree's questions to reach a decision, and keep the decision log as a PDF.

Available on: All plans | Who can do this: Everyone in the organization

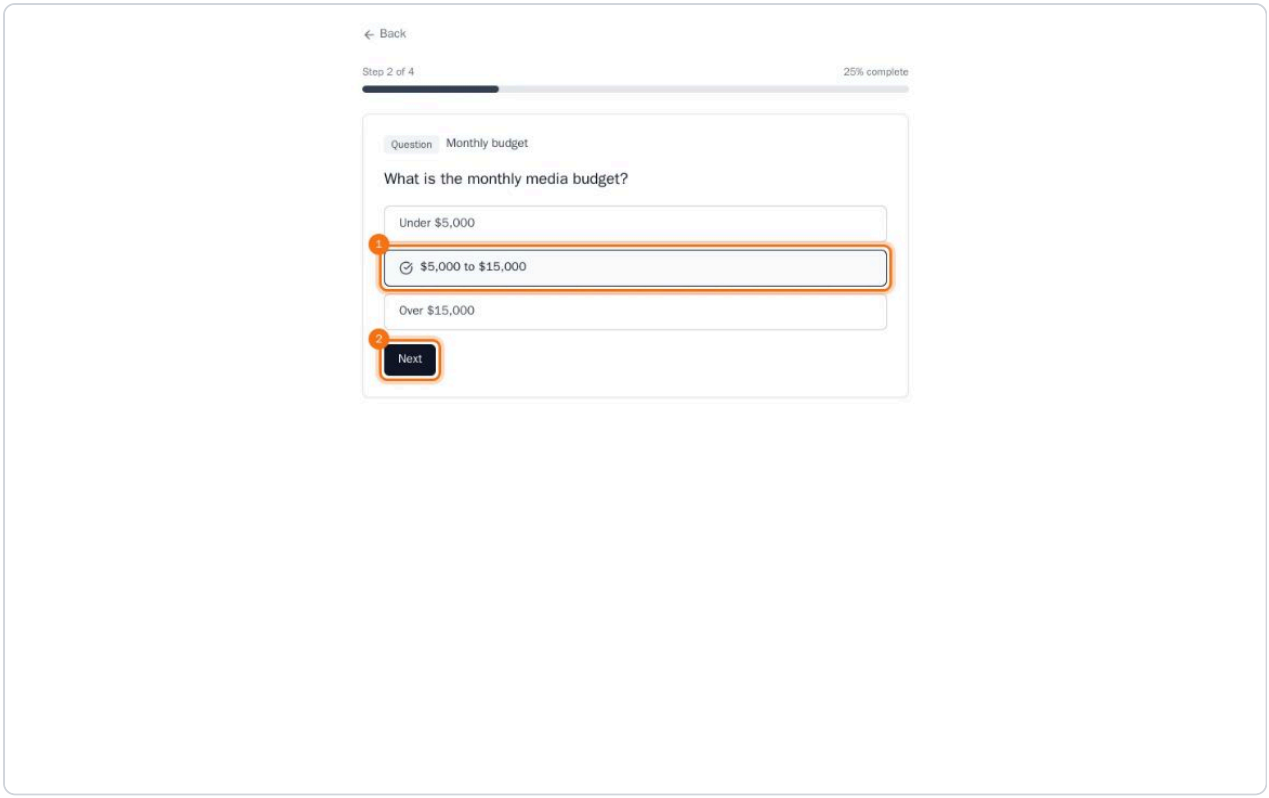
Run a decision tree when you have to make the decision it describes, for example which campaign package to offer a client. OKiDO asks the questions one by one, takes the branch that fits each answer, and shows the decision at the end, with a log of every answer.

Answer the questions

1. In the **Playbook**, open the folder and the process, and choose the decision tree. You see its questions and outcomes, and on the right its **Recent Sessions**.

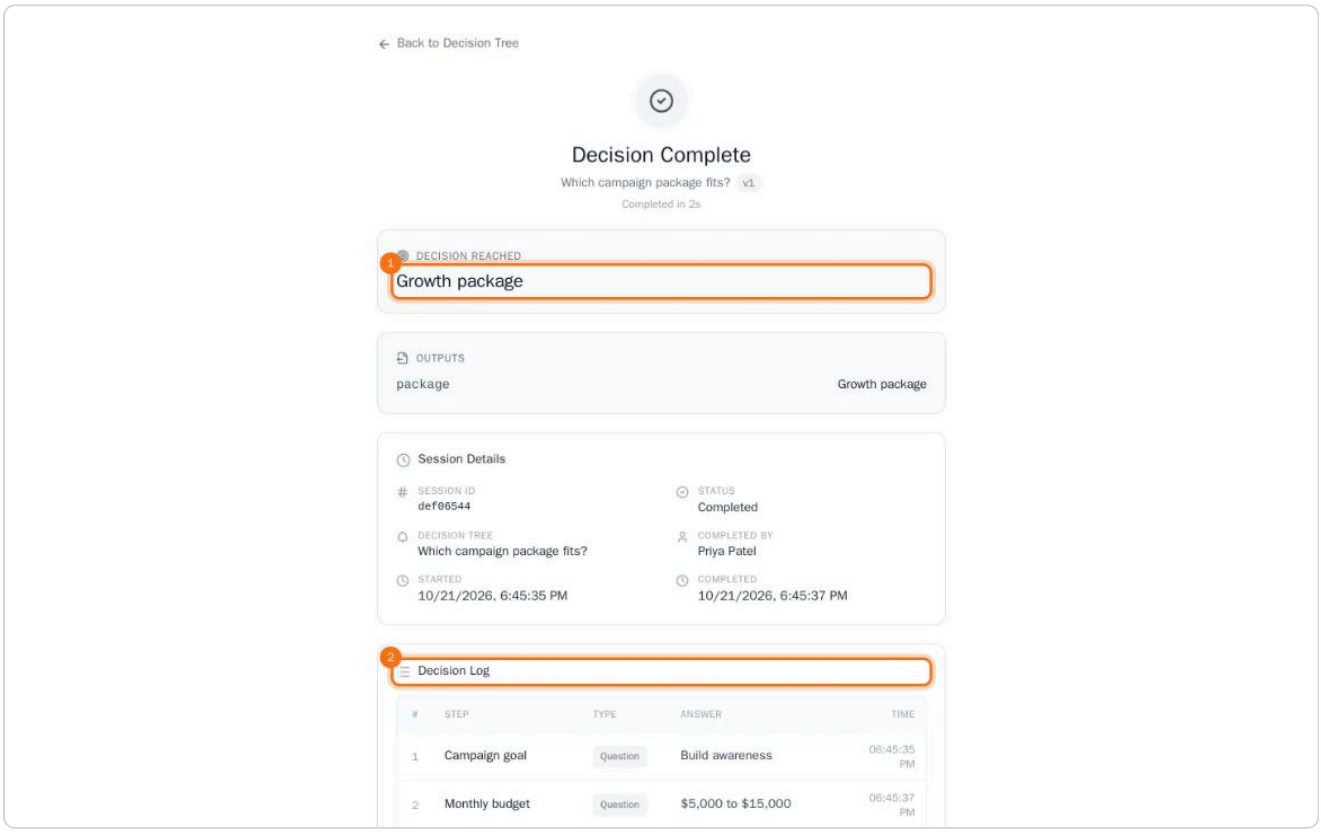


2. Choose **Run Quiz**. The first question opens. Above it you see which step you are on and how far you are.
3. Choose your answer, then **Next**.



4. Answer the next questions in the same way. Which questions come next depends on your answers.

After the last answer you see **Decision Complete**: the **Decision Reached**, its **Outputs**, and the **Decision Log** with every question and your answer.



Every run is kept as a session: it shows under **Recent Sessions** on the decision tree, and you can open it again to see the decision.

Keep the decision as a PDF

1. At the bottom of the page, choose **Download PDF**. A window with the decision log opens, together with your browser's print dialog.
2. In the print dialog, choose to save as PDF.

To print the decision log on paper, choose **Print** instead.

Answer a decision tree for a running system

When a running system needs your decision, find the request in your inbox and answer the decision tree so the system can go on.

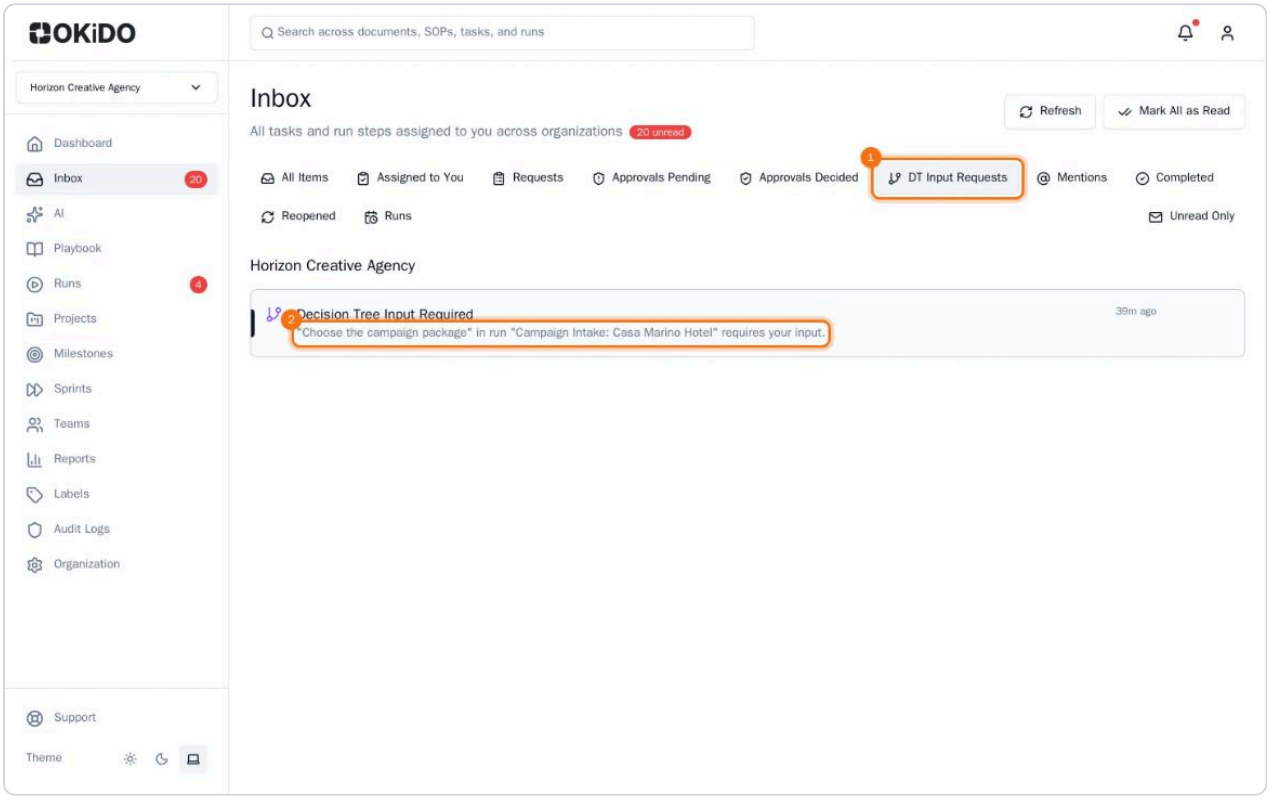
Available on: All plans | Who can do this: Everyone in the organization

Some systems stop at a decision: for a new campaign request, for example, the account manager chooses the package before the system creates the matching proposal task. The system then waits until the person it asks has answered the decision tree.

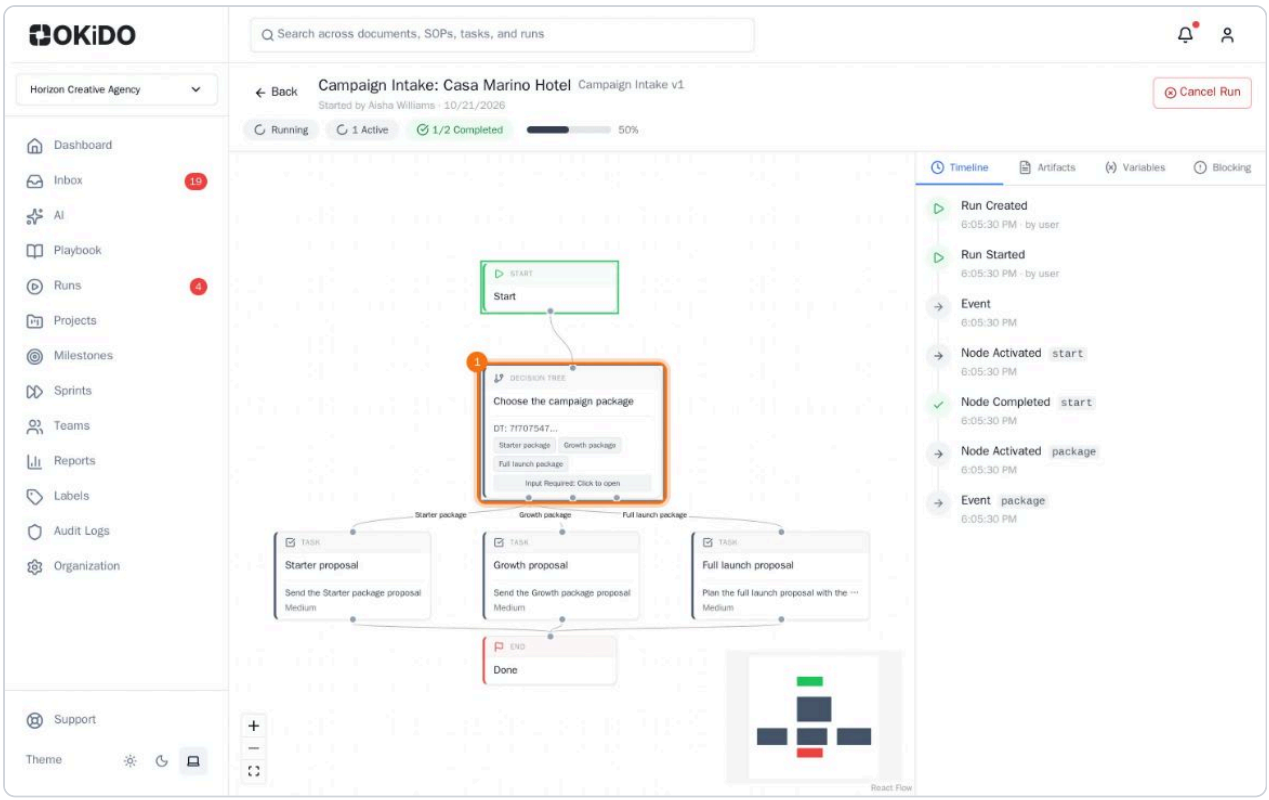
Find the request

When a system needs your decision, you get a notification in your **Inbox**.

1. Open the **Inbox** and choose **DT Input Requests**.

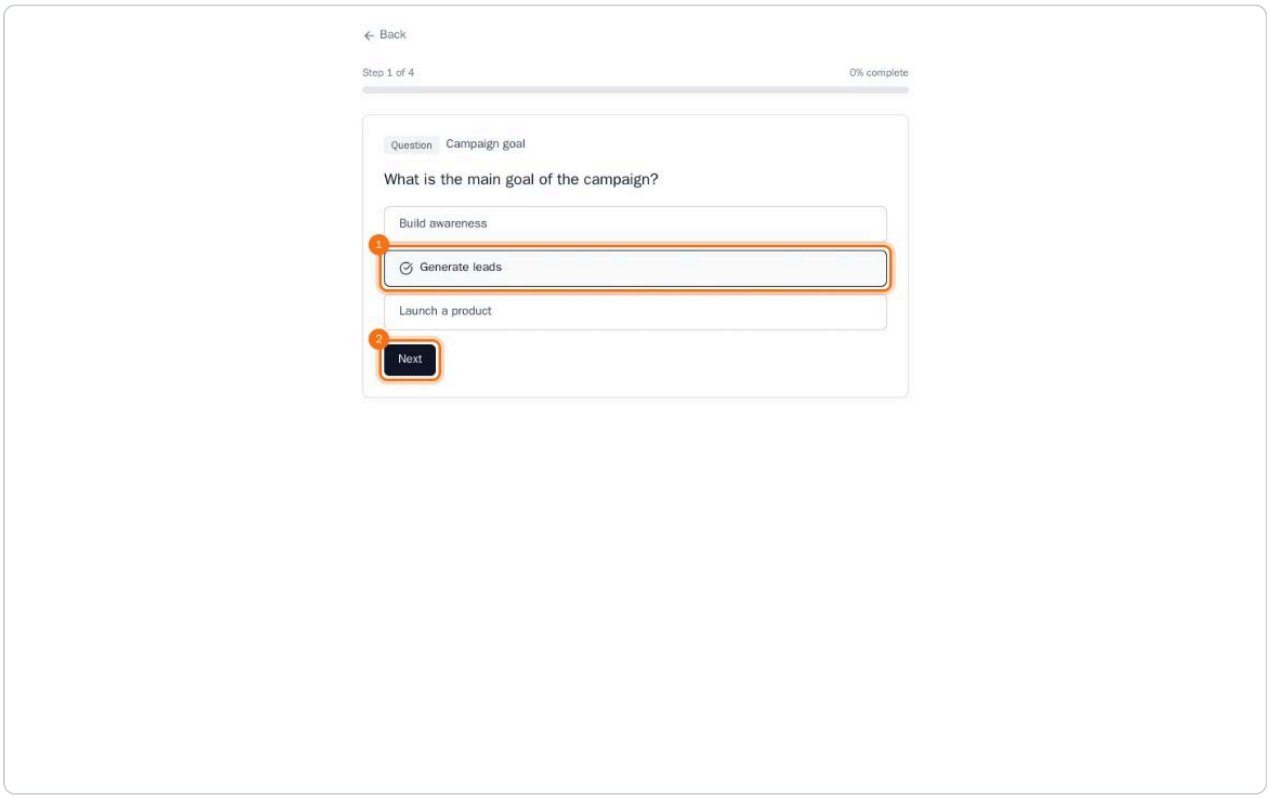


2. Choose the request. The run of the system opens. The decision tree that waits for you has a pulsing ring.



Answer the decision tree

1. Choose the decision tree with the pulsing ring. Its first question opens.
2. Choose your answer, then **Next**. Answer the next questions in the same way.



After the last answer you see the decision. The system goes on right away with the step that belongs to your decision, for example the proposal task for the package you chose. Open the run again to follow it.

For more about the questions and the decision log, see Run a decision tree.

CHAPTER 11

AI

Chat with AI

Create an AI agent

See your agents and their org chart

Configure an agent

Set what an agent may do

Set agent budgets and watch AI spending

Make an agent start on its own

Approve or reject agent actions

Review agent activity, artifacts and network logs

Put an agent to work on a project

Connect an MCP server

Import skills for agents

Have @copilot build a capability

Manage what agents remember

Give agents credentials for other apps

Read this chapter online

okido.io/en/docs/ai

Scan the code or open the link to read this chapter online, where it is always up to date.

Chat with AI

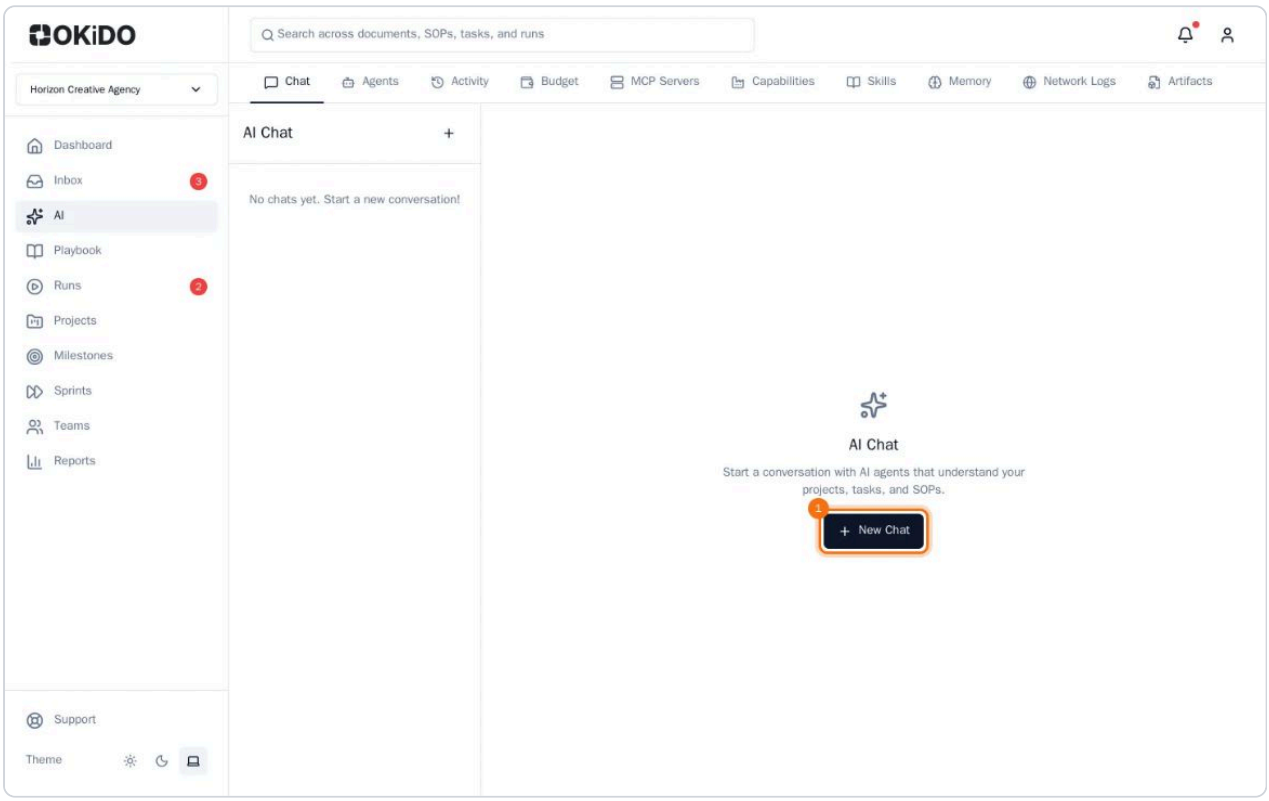
Ask the AI about your work, bring in an agent with @, point it at a project or task with #, and approve the changes it wants to make.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

AI Chat answers questions about your projects, tasks and runs, drafts text for you and can make changes in OKiDO for you. Copilot, your organization's AI, answers by default; mention one of your agents to ask it directly. When the AI wants to make a change that needs approval, such as creating a project, it stops and waits for a decision first.

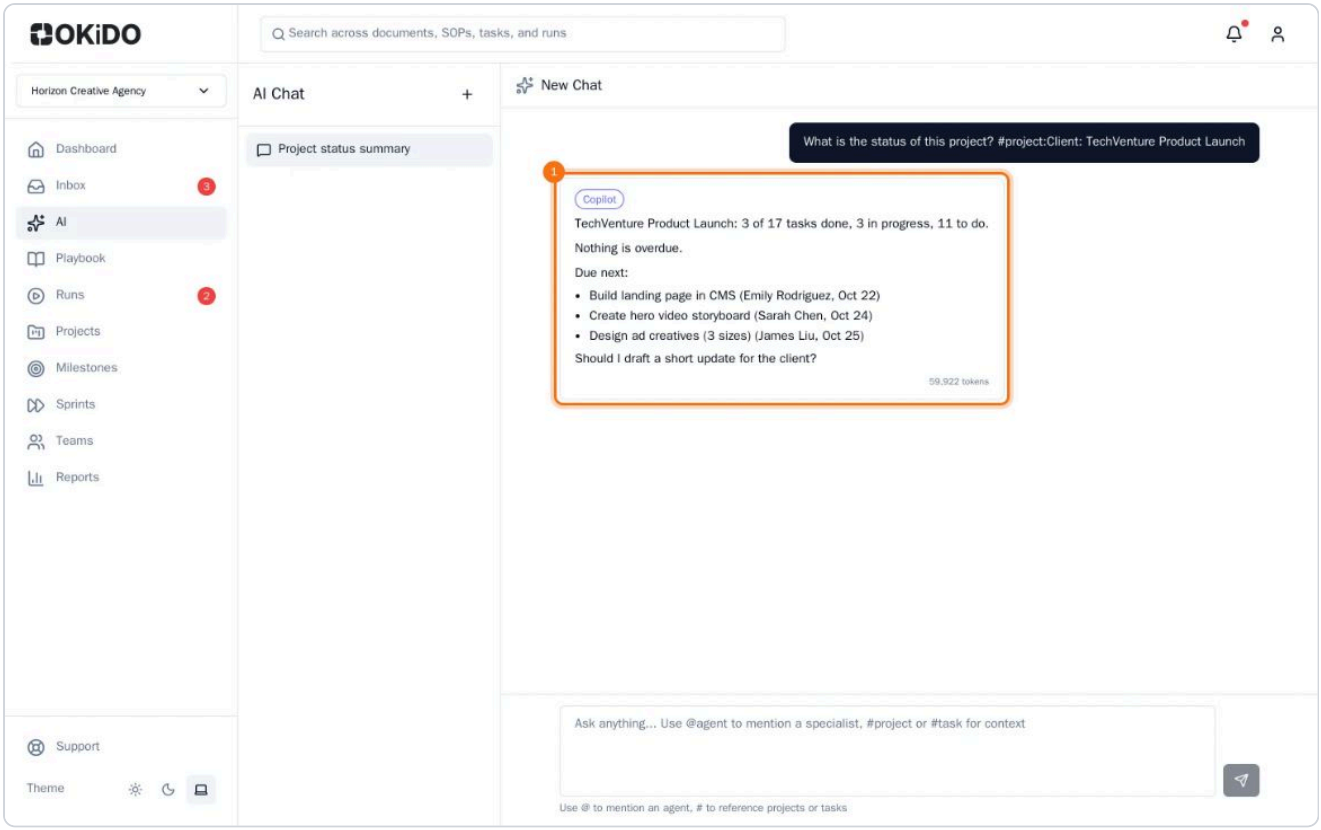
Ask a question

1. In the menu on the left, choose **AI**. **AI Chat** opens, with your earlier chats on the left.
2. Choose **New Chat**. When you already have chats, choose **+** next to **AI Chat** instead.



3. Type your question. To point the AI at a project, type **#** and choose the project from the list. For a task, type **#task:** and the first letters of its title.
4. Press Enter.

The answer appears under your question, with the name of the agent that answered. The chat gets a title in the list on the left, so you can find it again later.



Ask one of your agents

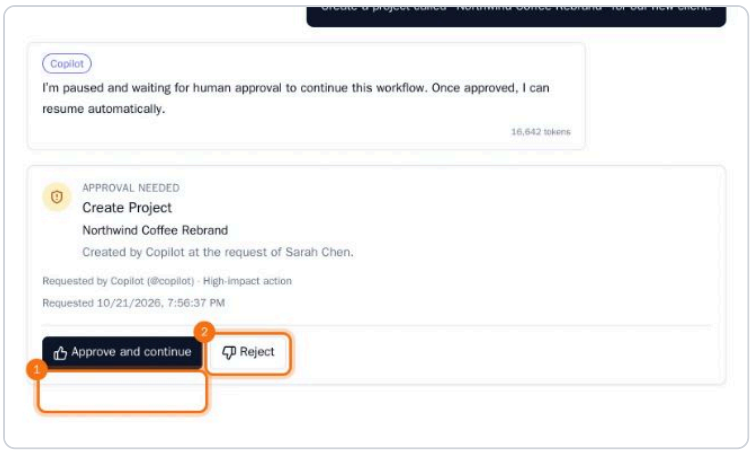
1. In the message box, type **@** and choose an agent from the list, for example **@copywriter-bot**.
2. Type what you need and press Enter.

That agent answers instead of Copilot, and its name is shown above the answer.

Approve or reject a change

When the AI wants to do something that needs approval, the chat shows the request and the label **Approval needed**. The AI waits until someone decides. Owners and admins make that decision.

1. Read what the AI wants to do and the details below it.
2. Choose **Approve and continue**. The AI makes the change and carries on with your request.



To stop it instead, choose **Reject**, tell the AI why if you like, and choose **Confirm rejection**. The AI gets your reason and does not make the change.

> **Tip:** To rename or delete a chat, point at it in the list on the left and choose the pencil or the bin.

Create an AI agent

Create a manager or specialist agent with the wizard, step by step from its role to its resource limits.

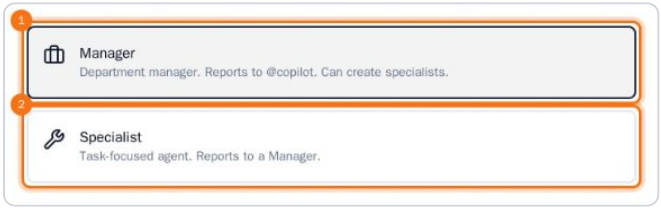
Available on: Starter · Pro · Business | Who can do this: Owner, Admin

An agent is an AI team member with its own job: a manager that plans work and hands it on, or a specialist that does one kind of work well. The wizard asks for its role, its identity, how it behaves and how much it may use, then shows everything once more before you create it.

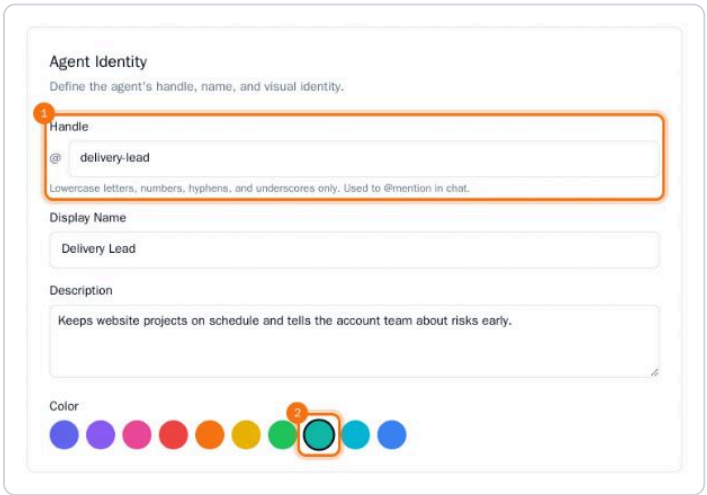
Owners and admins create agents, and members who have the Advanced AI features (see Change a member's role or Advanced AI access).

Create an agent

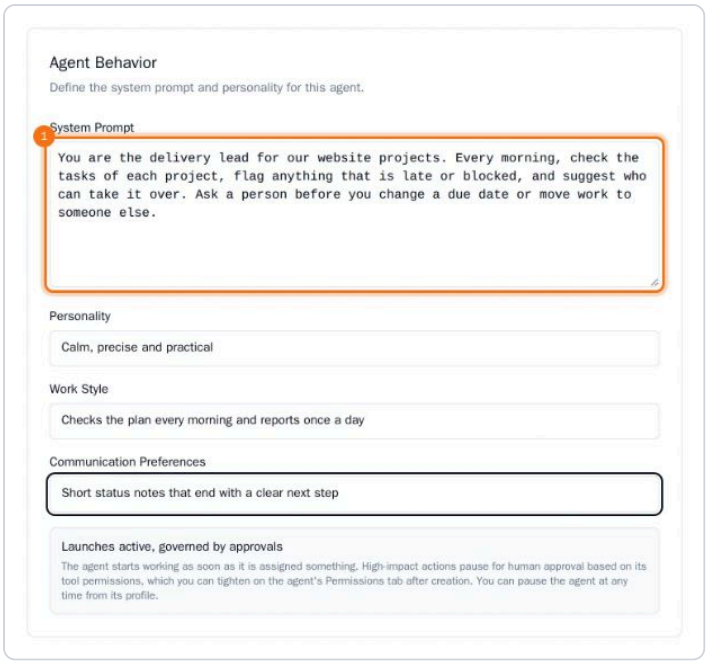
1. In the menu on the left, choose **AI**, then the **Agents** tab, then **Create Agent**.
2. Choose the role:
   - **Manager**: reports to @copilot and can have specialists of its own. Under **Choose a template (optional)** you can start from a ready-made manager, which fills in the next steps for you.
   - **Specialist**: does focused work and reports to a manager. Choose the manager under **Reports to**.



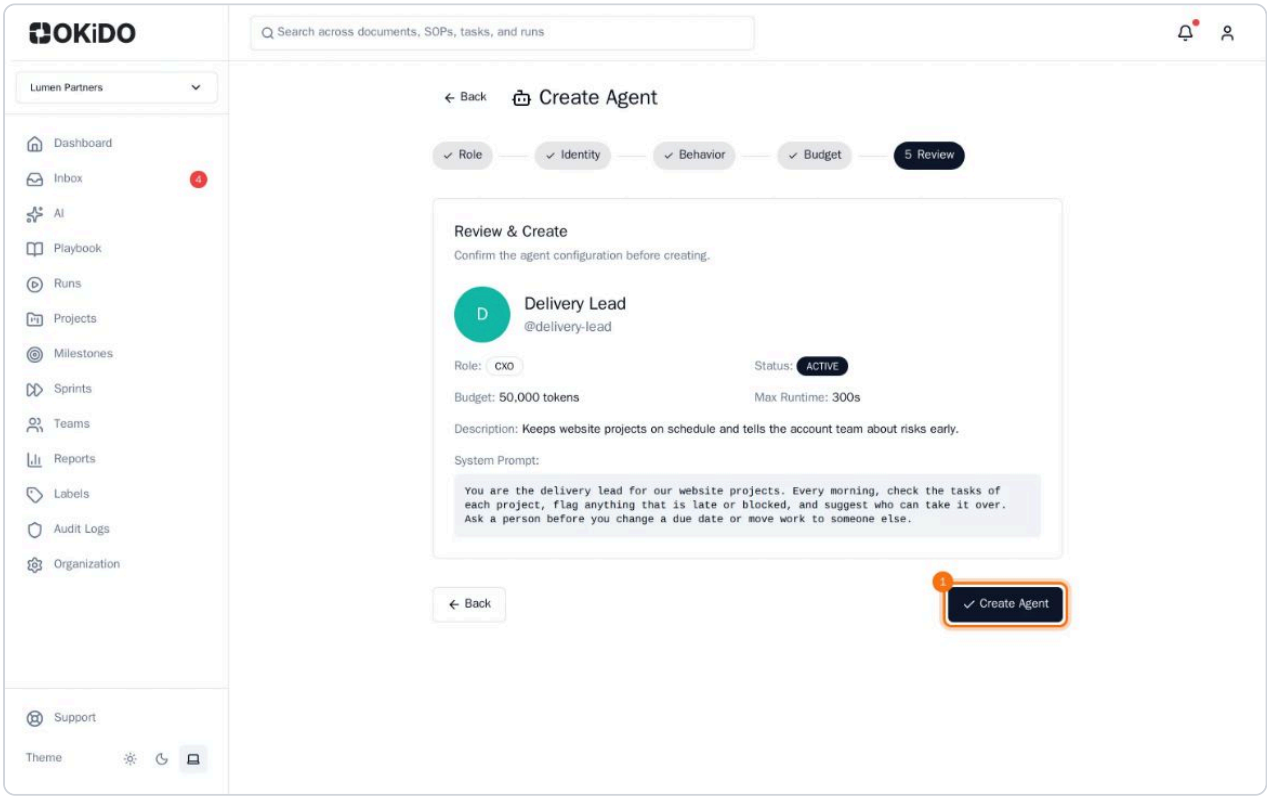
3. Choose **Next**, then fill in the agent's identity: the **Handle** you use to @mention it, its **Display Name**, a **Description** and a **Color**.



4. Choose **Next** and write the **System Prompt**: what the agent is responsible for and how it should work. Add its **Personality**, **Work Style** and **Communication Preferences** if you like.



5. Choose **Next** and set the resource limits: the **Token Budget (per period)**, and how many tool calls, steps and seconds one run may take.
6. Choose **Next**, check the summary and choose **Create Agent**.



The agent's page opens. The agent is active right away: it starts working as soon as it is given work, for example a task assigned to it. Changes with a big impact wait for a person's approval,

depending on its permissions (see Set what an agent may do).

> **Tip:** Made a mistake in an earlier step? Choose the step's name at the top of the wizard to go back to it.

See your agents and their org chart

Browse your AI agents as an org chart or as a list, and see who reports to whom.

Available on: Starter · Pro · Business | Who can do this: Owner, Admin

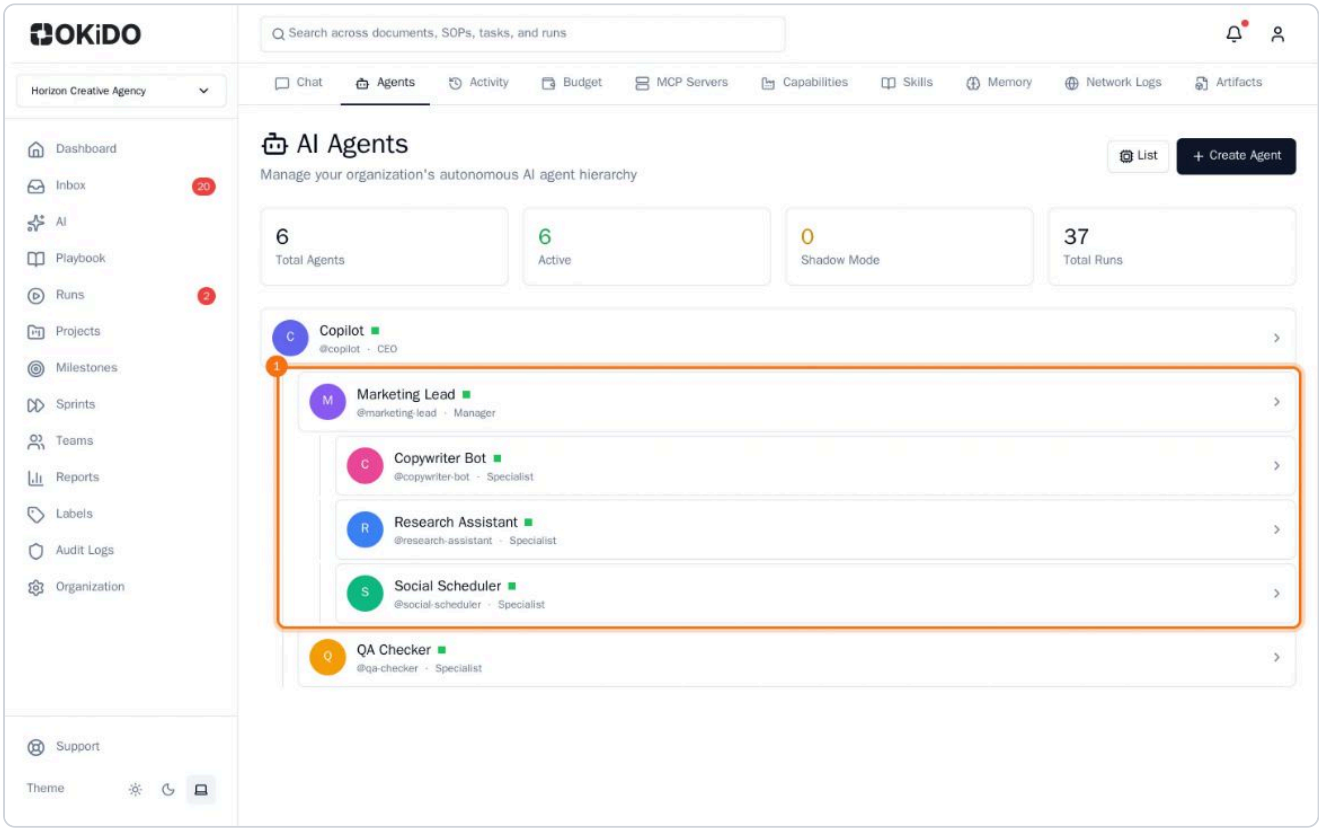
Your AI agents are organized like a team. Copilot (**@copilot**) is at the top as the CEO. Managers report to Copilot and hand work to the specialists who report to them. The **Agents** page shows them all, with their place in that hierarchy.

Owners and admins see this page, and members who have the Advanced AI features (see Change a member's role or Advanced AI access).

See the org chart

1. In the menu on the left, choose **AI**, then the **Agents** tab.

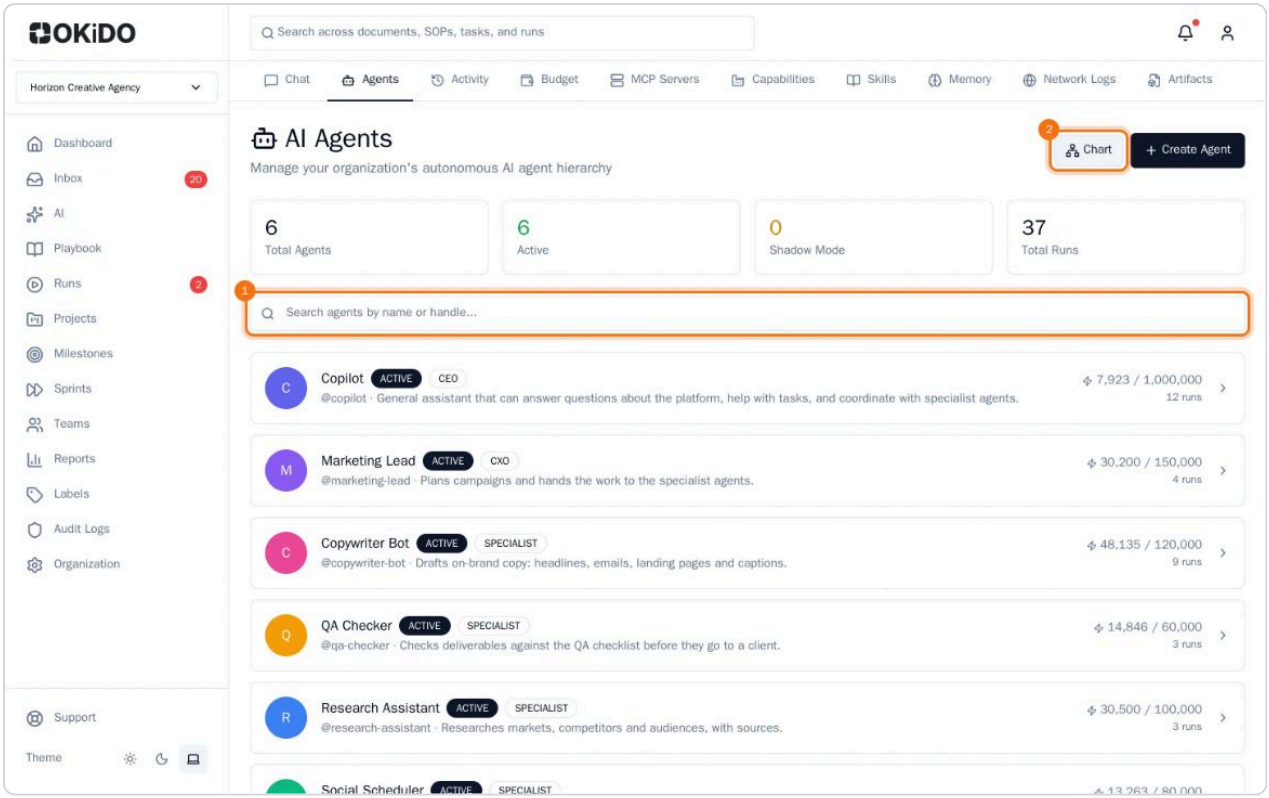
The page opens with the org chart. Each agent shows its name, its handle and its role. Agents are indented under the agent they report to, and the dot after the name shows the status: green while the agent is active, yellow when it is paused. At the top you see how many agents you have, how many are active and how many runs they did in total.



Choose an agent to open its page.

Find an agent in the list

1. Choose **List**. The list shows each agent's status, role and description, the tokens it used out of its budget, and its number of runs.



2. Type part of a name or handle in the search box (**Search agents by name or handle...**).

Only the agents that match stay in the list. Choose **Chart** to go back to the org chart.

Configure an agent

Change an agent's instructions, model and runtime limits, and pause, activate or deactivate it.

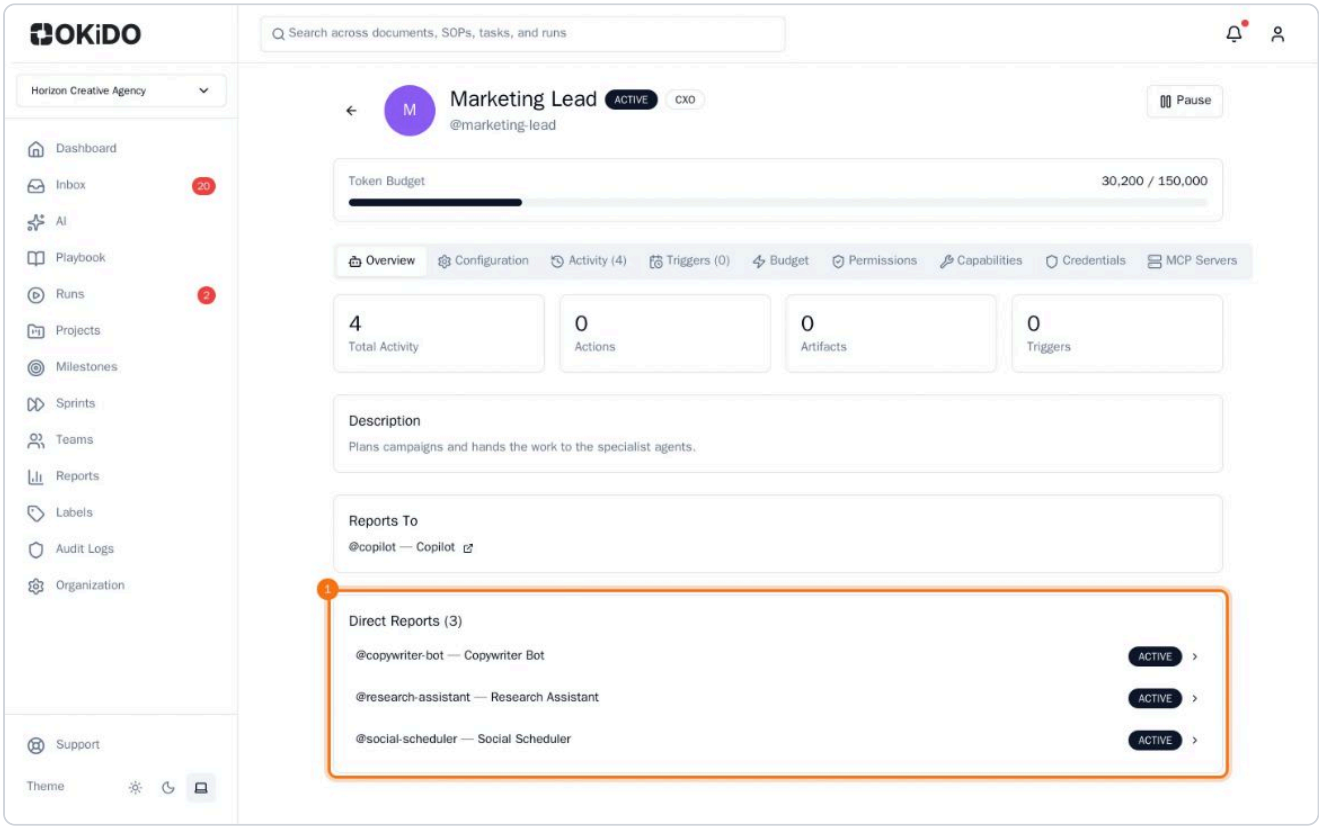
Available on: Starter · Pro · Business | Who can do this: Owner, Admin

Each agent has its own page with everything about it: what it did, how it is set up and what it may do. Here you sharpen its instructions, give it another AI model, limit how much one run may take, and stop it for a while or for good.

Open an agent

1. In the menu on the left, choose **AI**, then the **Agents** tab.
2. Choose the agent.

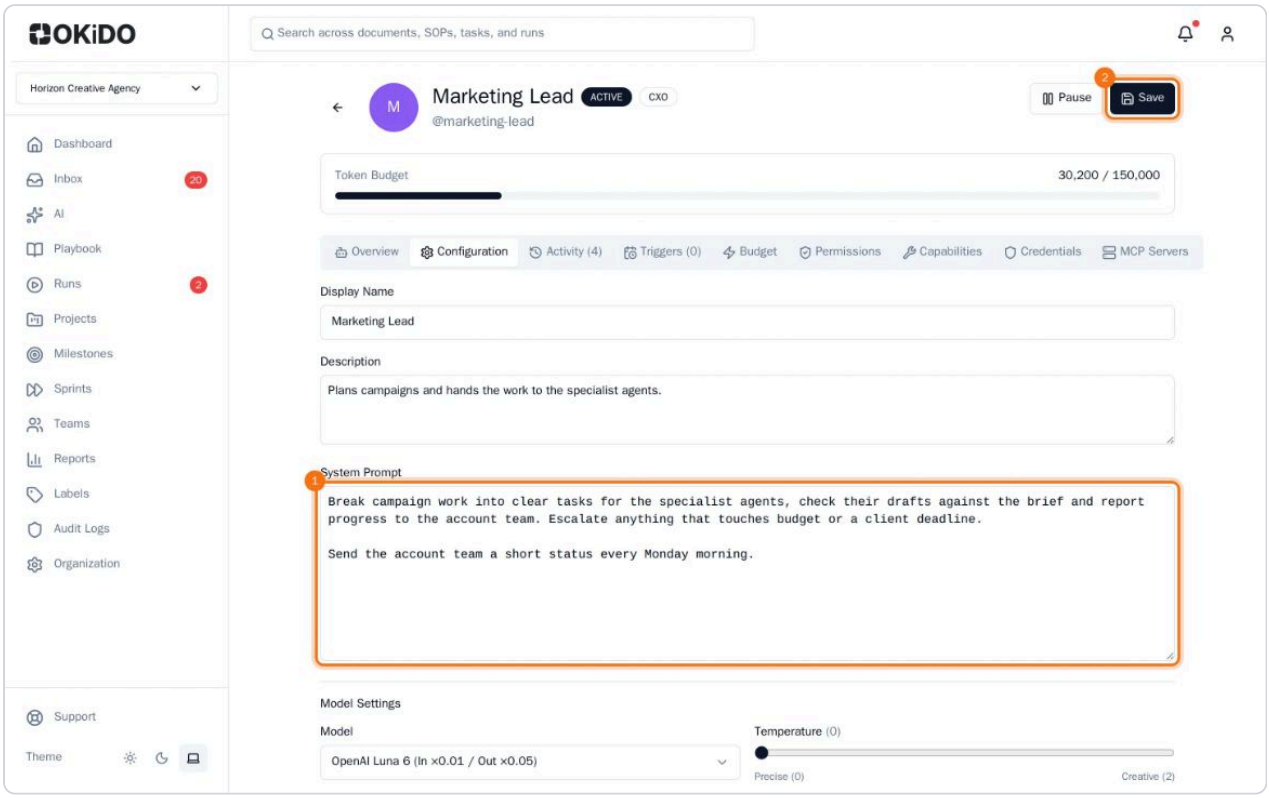
The agent's page opens on **Overview**: how many runs, actions, artifacts and triggers it has, what it does, who it reports to and which agents report to it. The bar at the top shows how much of its token budget it has used.



Change its instructions, model and limits

1. Choose the **Configuration** tab.
2. Change the **Display Name**, the **Description** or the **System Prompt**: the instructions the agent follows on every run.

3. Under **Model Settings**, choose a **Model**. With **Organization default**, the agent uses the models set for your organization (see Choose AI models and auto-recharge). Move **Temperature** to the left for precise answers, to the right for more creative ones.
4. Under **Runtime Limits**, set the **Token Budget** and how much one run may take: **Max Tokens / Response**, **Max Tool Calls / Run**, **Max Iterations** and **Max Runtime (seconds)**.
5. Choose **Save** at the top of the page. The button appears as soon as you change something.



The agent uses the new settings from its next run on.

Pause or activate an agent

Choose **Pause** at the top right. The agent's status changes to **PAUSED**, and it takes on no new work until you choose **Activate**.



Deactivate an agent

When you no longer need an agent:

1. On the **Configuration** tab, under **Danger Zone**, choose **Deactivate Agent**.
2. Choose **Deactivate**.

The agent stops working and you are back on the agent list, where the agent stays with the status **ARCHIVED**. Agents that reported to it are deactivated as well. To use it again, open it and choose **Activate**.

Set what an agent may do

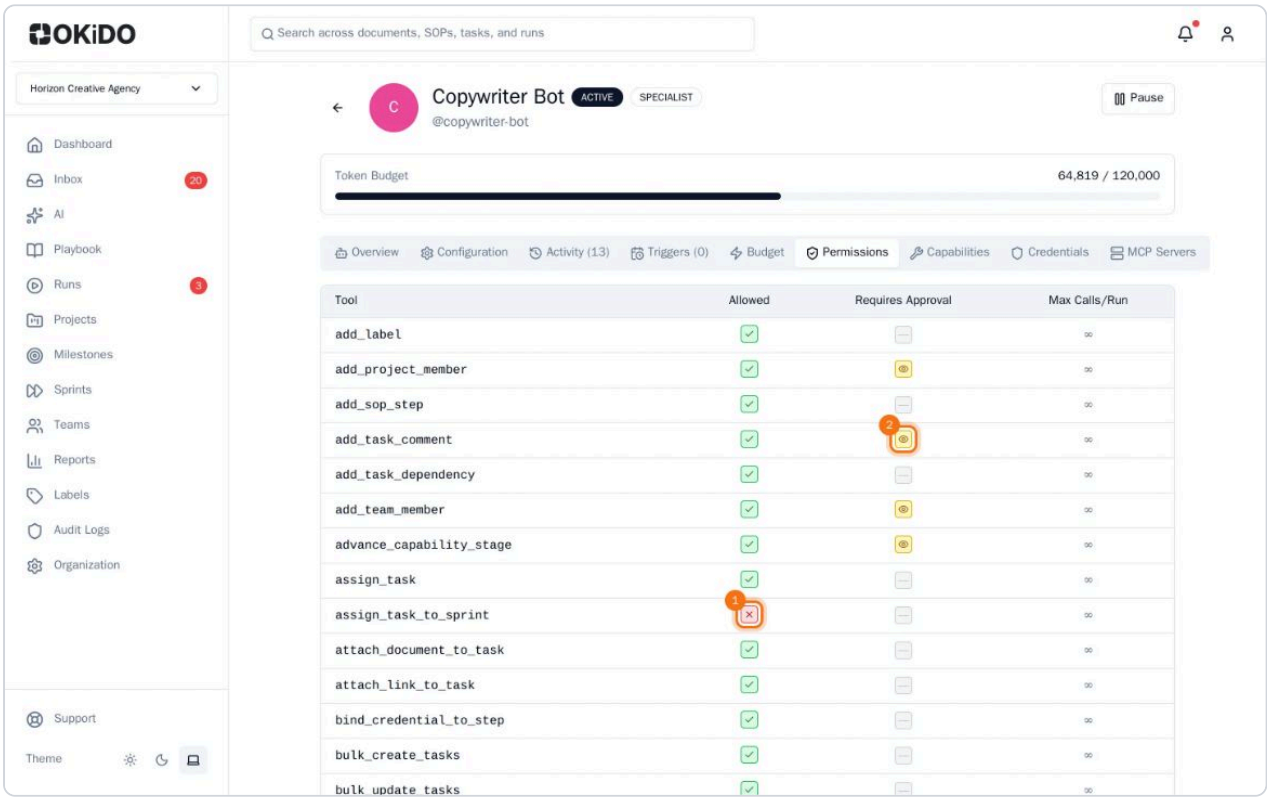
Allow or block the tools an agent works with, decide which ones need your approval first, and limit the tool calls of a run.

Available on: Starter · Pro · Business | Who can do this: Owner, Admin

Agents work through tools: one tool reads tasks, another writes a comment, sends an email or creates a project. For each agent you decide which tools it may use, and which ones it may only use after a person approved.

Allow or block a tool, or make it ask first

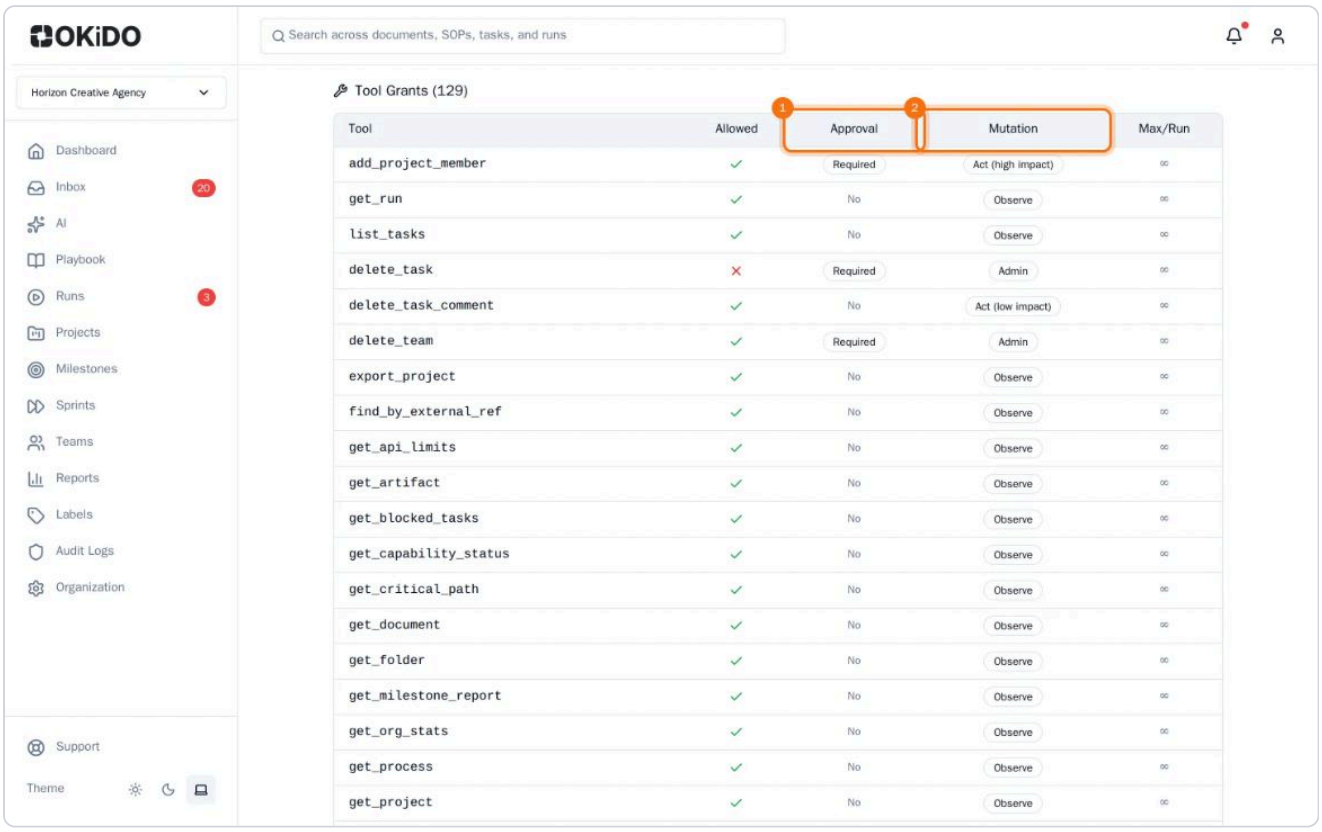
1. Open the agent: **AI**, the **Agents** tab, then the agent.
2. Choose the **Permissions** tab.
3. In the **Allowed** column, choose the box next to a tool to block it (a red cross) or to allow it again (a green check).
4. In the **Requires Approval** column, choose the box to make the agent ask first (an eye) or to let it use the tool without asking (a dash).



Each change is saved right away. When the agent wants to use a tool that asks first, the action waits under **Activity** until someone approves it (see Approve or reject agent actions). A blocked tool is not available to the agent at all.

See what each tool can change

On the **Capabilities** tab, the list of tool grants shows the same tools with how much each one can change in the **Mutation** column: from **Observe** (only reads) through **Act (low impact)** and **Act (high impact)** to **Admin** (changes to the organization itself). Tools that ask first are marked **Required**.



Limit the tool calls of a run

To stop one run from using tools endlessly, set **Max Tool Calls / Run** on the **Configuration** tab and choose **Save** (see Configure an agent).

Set agent budgets and watch AI spending

Give an agent a token budget, and follow how many tokens your agents use on the budget dashboard.

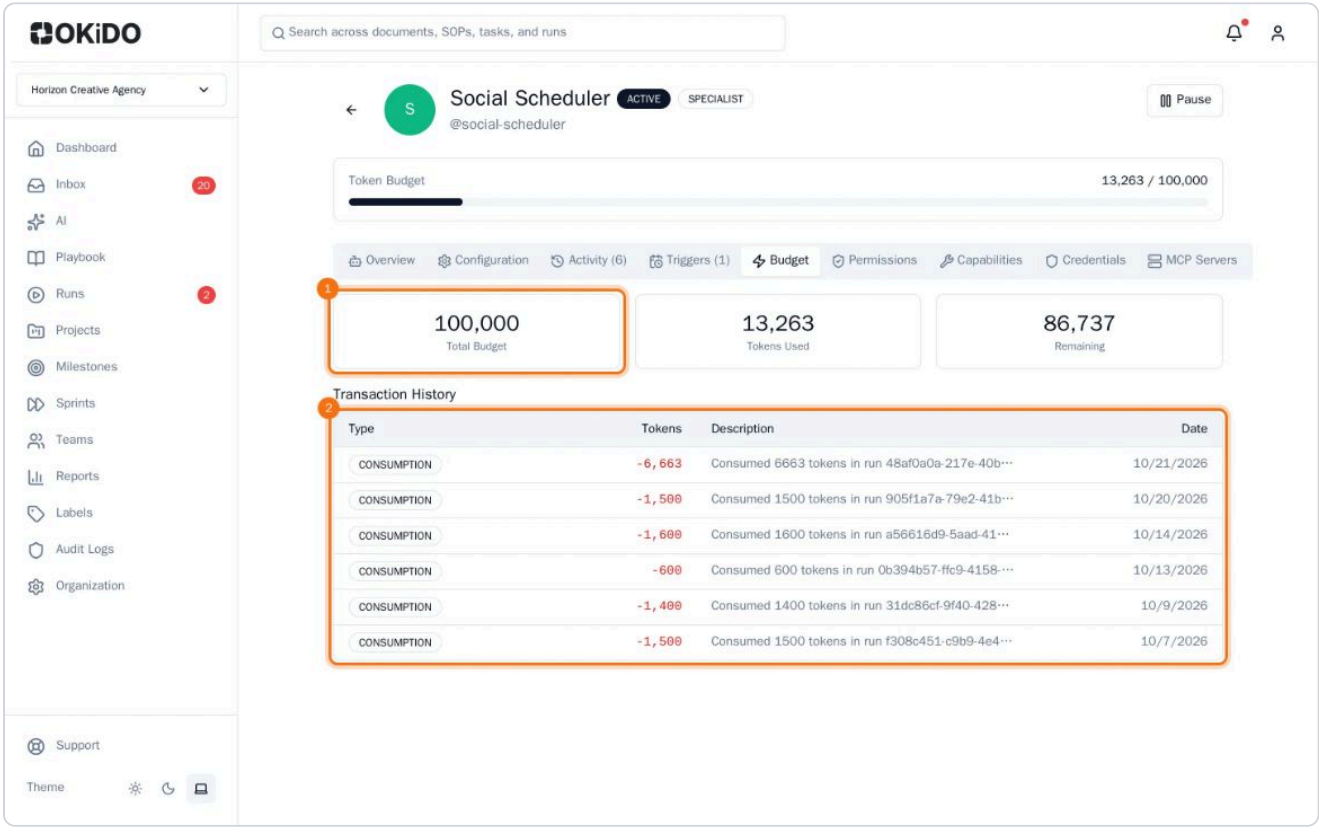
Available on: Starter · Pro · Business | Who can do this: Owner, Admin

Everything an agent does costs tokens: the AI reads and writes in tokens. Each agent has a token budget, so one busy agent cannot use up what your organization has. The budget dashboard shows how much every agent and every project used.

Give an agent a token budget

1. Open the agent: **AI**, the **Agents** tab, then the agent.
2. On the **Configuration** tab, under **Runtime Limits**, enter the **Token Budget**.
3. Choose **Save** at the top of the page.
4. Choose the **Budget** tab to check it.

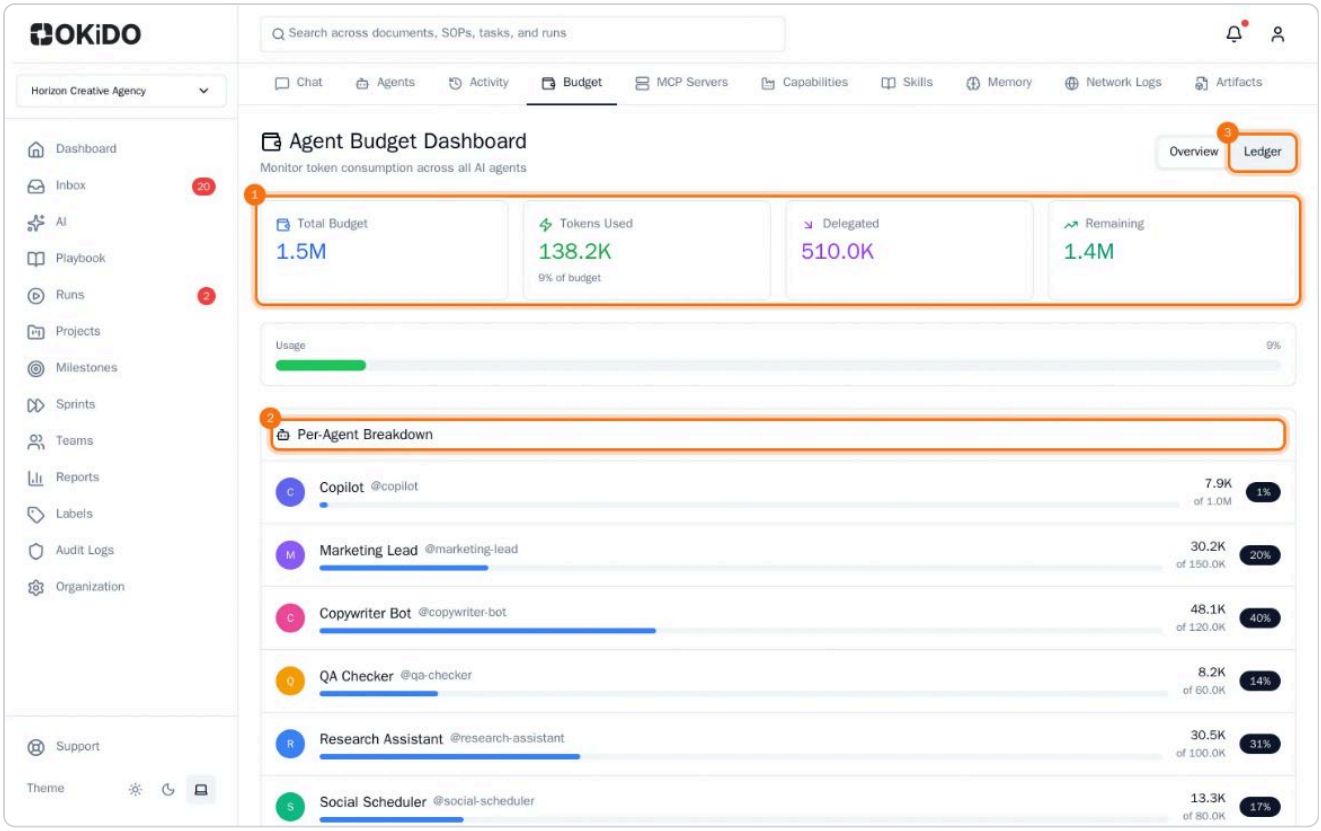
The **Budget** tab shows the agent's **Total Budget**, the **Tokens Used** and what is **Remaining**. Below, the **Transaction History** lists the tokens each run used. The bar at the top of the agent's page turns yellow and then red as the agent gets close to its budget.



Watch AI spending across agents

1. In the menu on the left, choose **AI**, then the **Budget** tab.

The **Agent Budget Dashboard** adds up the budgets of all your agents and shows how much of it is used and what is left. Under **Per-Agent Breakdown** you see each agent's use against its own budget, and under **Per-Project Usage** the projects the tokens were used for. Choose an agent's name to open its page.



Choose **Ledger** at the top right to see every transaction, newest first, with the agent, the amount and the balance after it.

Make an agent start on its own

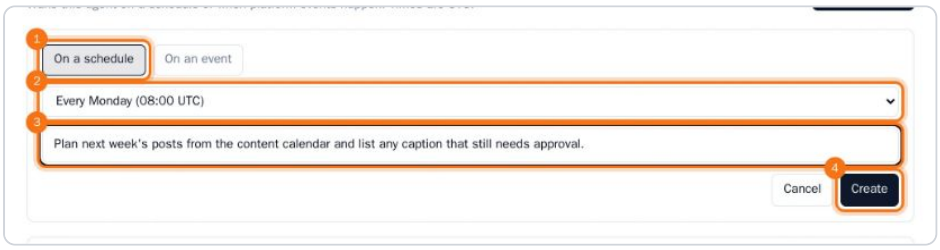
Add triggers so an agent wakes up on a schedule or when something happens in OKiDO.

Available on: Starter · Pro · Business | Who can do this: Owner, Admin

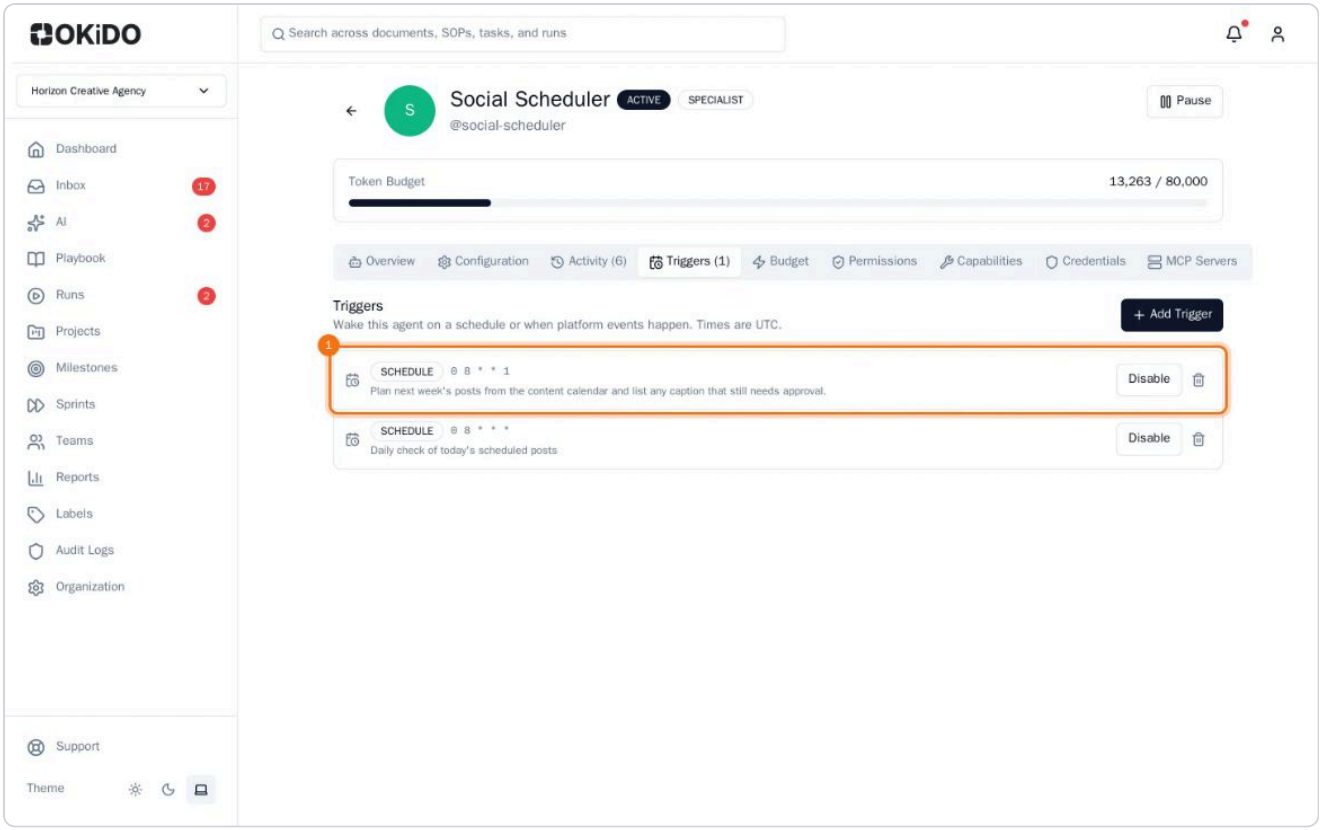
Without triggers, an agent only works when someone gives it work: a task assigned to it, a mention or a question in AI Chat. A trigger makes it start by itself, for example every Monday morning, or each time a task is completed.

Add a trigger

1. Open the agent: **AI**, the **Agents** tab, then the agent.
2. Choose the **Triggers** tab, then **Add Trigger**.
3. Choose when the agent starts:
   - **On a schedule**: pick a moment from the list, such as **Every Monday (08:00 UTC)**. With **Custom...** you type a cron expression for any other schedule. Times are in UTC.
   - **On an event**: pick what happens in OKiDO, for example `task.completed` when a task is completed or `comment.created` when someone comments.
4. Describe what the agent should do when the trigger fires. This is optional, but it tells the agent why it woke up.
5. Choose **Create**.



The trigger is added to the list with its schedule or event and its description.



Turn a trigger off or delete it

- Choose **Disable** to pause a trigger; it is marked **Disabled** until you choose **Enable**.
- To remove a trigger, choose the bin next to it, then **Delete**.

> **Tip:** To make an agent react to what happens in one project only, such as new tasks or comments there, deploy it to that project and pick its triggers in the project's briefing (see Put an agent to work on a project).

Approve or reject agent actions

Review the actions and tool access your agents are waiting for, then approve, reject with a reason, or grant access.

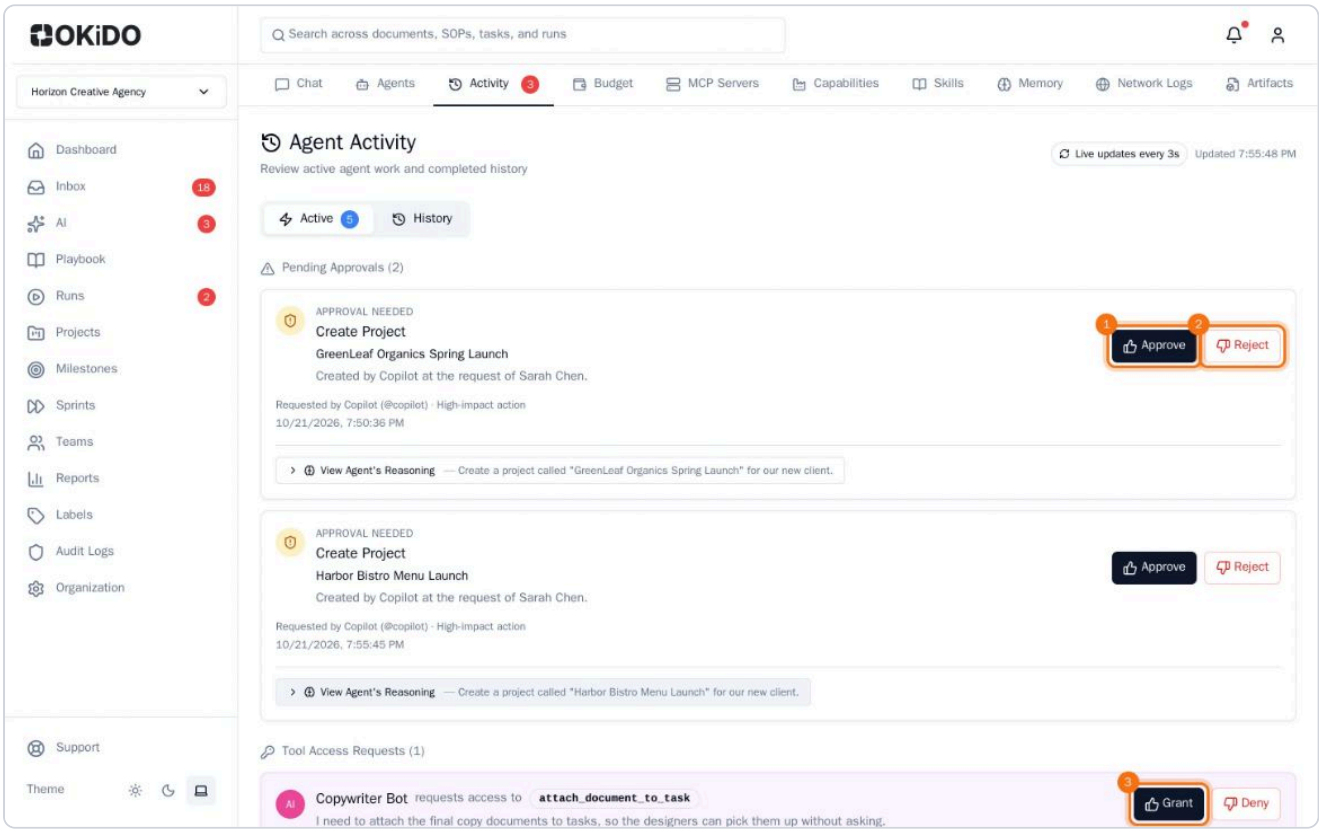
Available on: Starter · Pro · Business | Who can do this: Owner, Admin

Agents stop and wait before an action that needs a person's approval, such as creating a project or sending an email, and when they need a tool they are not allowed to use yet. All of this waits for you in one place: the **Activity** tab under **AI**. A red number on the tab shows how many items wait.

See what waits for you

1. In the menu on the left, choose **AI**, then the **Activity** tab.

The **Active** tab lists the actions waiting for approval and, below them, the tool access requests. Each action shows what the agent wants to do, which agent asks, how big the impact is and when it asked. Choose **View Agent's Reasoning** to see the run behind it: what the agent read and did before it stopped.



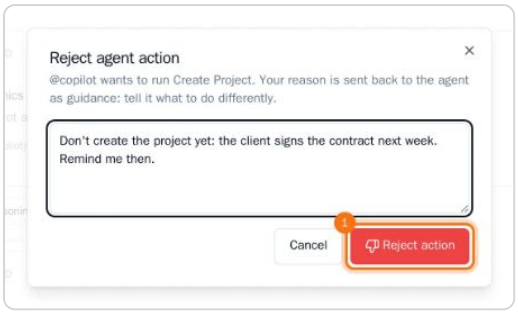
Approve an action

1. Choose **Approve** next to the action.
2. For an action with a big impact, confirm with **Approve & execute**.

The agent carries out the action right away and continues its work.

Reject an action

1. Choose **Reject** next to the action.
2. Tell the agent what to do instead. Your reason is sent to the agent as guidance.
3. Choose **Reject action**.

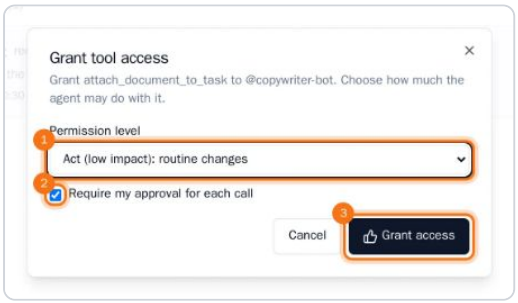


The action is not carried out, and the agent gets your reason.

Grant or deny tool access

When an agent asks for a tool it may not use yet, the request shows the tool and the agent's reason.

1. Choose **Grant**.
2. Under **Permission level**, choose how much the agent may do with the tool, from **Observe: read-only** to **Act (high impact): destructive or broad changes**.
3. Keep **Require my approval for each call** ticked if the agent should still ask you each time it uses the tool.
4. Choose **Grant access**.



The agent can use the tool from now on, and it appears on the agent's **Permissions** tab. To refuse the request, choose **Deny** instead.

Review agent activity, artifacts and network logs

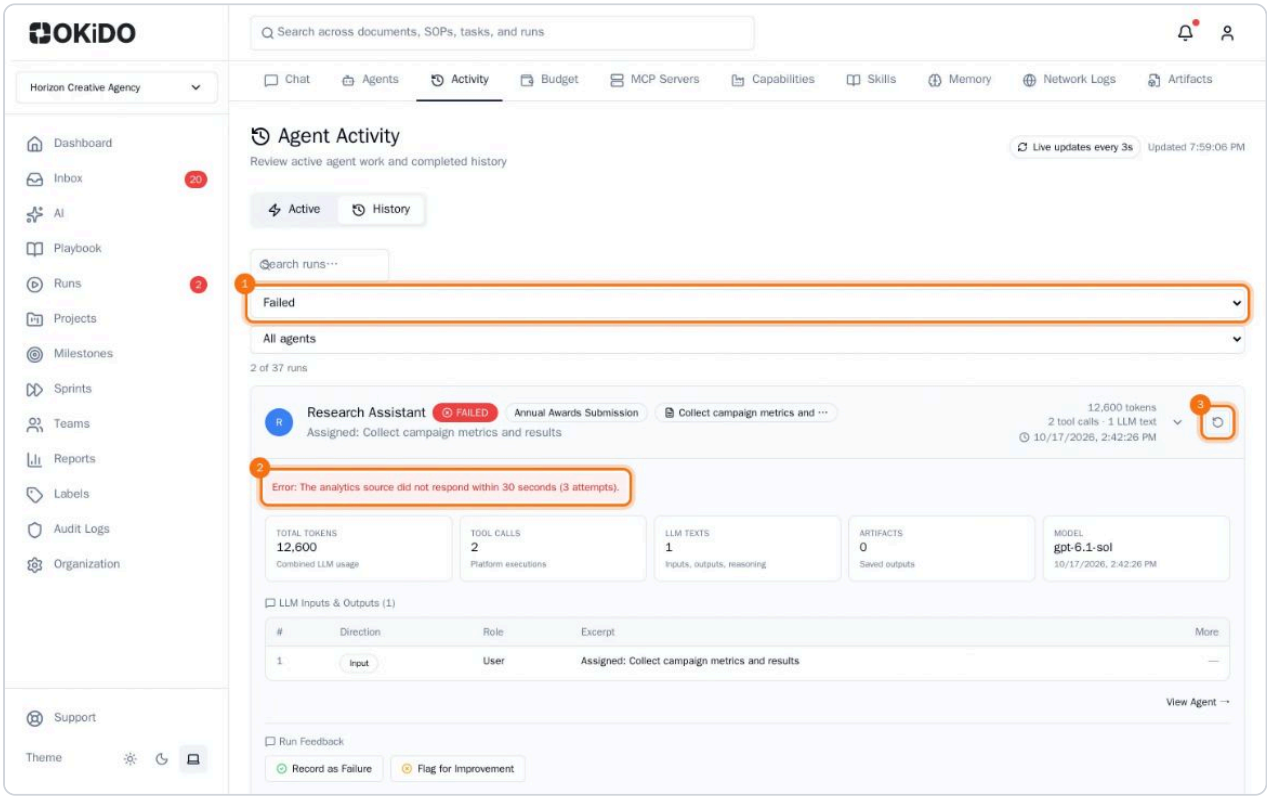
See what your agents are doing and have done, open the reports and files they made, and check every request they sent outside OKiDO.

Available on: Starter · Pro · Business | Who can do this: Owner, Admin

Every time an agent works, OKiDO records a run: what started it, what the agent read and did, how many tokens it used and what it produced. Three pages under **AI** let you follow this: **Activity** for the runs, **Artifacts** for what the agents produced and **Network Logs** for the requests they sent to other websites.

See what agents did

1. In the menu on the left, choose **AI**, then the **Activity** tab.
2. Choose **History**. The **Active** tab shows the runs that are still going and what waits for approval.
3. Narrow the list down if you like: search the runs, or pick a status such as **Failed** or an agent.
4. Choose a run to open it.



An open run shows its tokens, tool calls and saved outputs, what the agent was asked and answered, and the tool calls it made. A failed run shows what went wrong. To try it again, choose **Retry run** (the round arrow next to the run). **View Agent →** opens the agent that did the run.

The page updates itself every few seconds, so you can watch a run while it works.

Open what agents produced

Agents save their reports, drafts and data files as artifacts.

1. Choose the **Artifacts** tab.
2. Choose an artifact in the list. Use the buttons above the list to show only one type, such as **REPORT**.

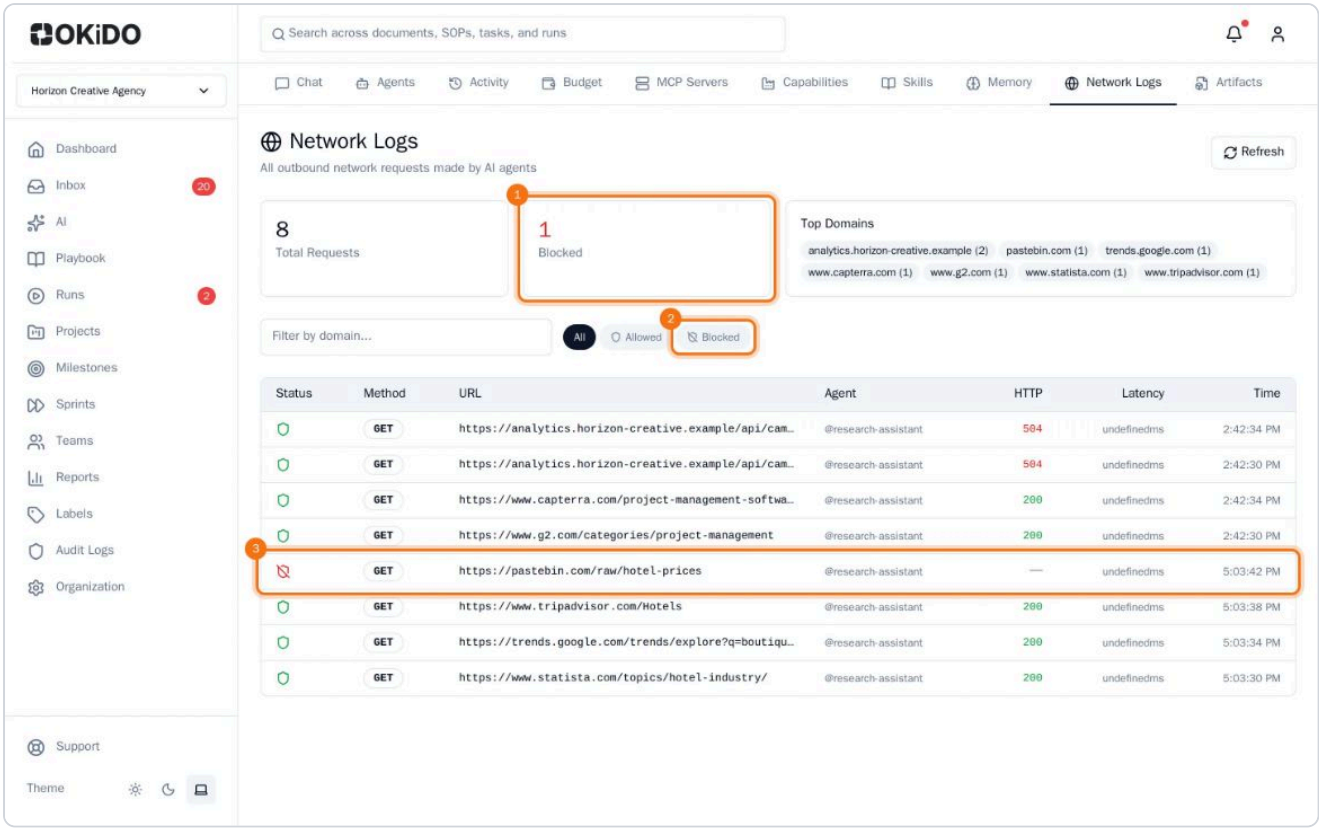
The artifact opens on the right with the agent that made it, when, and its content.



Check requests to other websites

1. Choose the **Network Logs** tab.

The page counts all requests and the **Blocked** ones, and shows the websites agents visit most. The list shows each request with its address, the agent that sent it and the answer it got; a red shield marks a request OKiDO blocked because the website is not on the agent's list of allowed sites. Choose **Blocked** to see only those, or type a website in **Filter by domain...**.


OKiDO
Search across documents, SOPs, tasks, and runs
Horizon Creative Agency
Chat
Agents
Activity
Budget
MCP Servers
Capabilities
Skills
Memory
Network Logs
Artifacts
Dashboard
Inbox
20
AI
Playbook
Runs
2
Projects
Milestones
Sprints
Teams
Reports
Labels
Audit Logs
Organization
Support
Theme
Network Logs
All outbound network requests made by AI agents
Refresh
8
Total Requests
1
Blocked
Top Domains
analytics.horizon-creative.example (2)
pastebin.com (1)
trends.google.com (1)
www.capterra.com (1)
www.g2.com (1)
www.statista.com (1)
www.tripadvisor.com (1)
Filter by domain...
All
Allowed
Blocked
Status
Method
URL
Agent
HTTP
Latency
Time
GET https://analytics.horizon-creative.example/api/cam… @research-assistant 504 undefinedms 2:42:34 PM
GET https://analytics.horizon-creative.example/api/cam… @research-assistant 504 undefinedms 2:42:30 PM
GET https://www.capterra.com/project-management-softwa… @research-assistant 200 undefinedms 2:42:34 PM
GET https://www.g2.com/categories/project-management @research-assistant 200 undefinedms 2:42:30 PM
GET https://pastebin.com/raw/hotel-prices @research-assistant — undefinedms 5:03:42 PM
GET https://www.tripadvisor.com/Hotels @research-assistant 200 undefinedms 5:03:38 PM
GET https://trends.google.com/trends/explore?q=boutiqu… @research-assistant 200 undefinedms 5:03:34 PM
GET https://www.statista.com/topics/hotel-industry/ @research-assistant 200 undefinedms 5:03:30 PM

Put an agent to work on a project

Deploy an agent to a project, brief it with a goal and instructions, choose what starts it and test it on a sample event.

Available on: Starter · Pro · Business | Who can do this: Owner, Admin

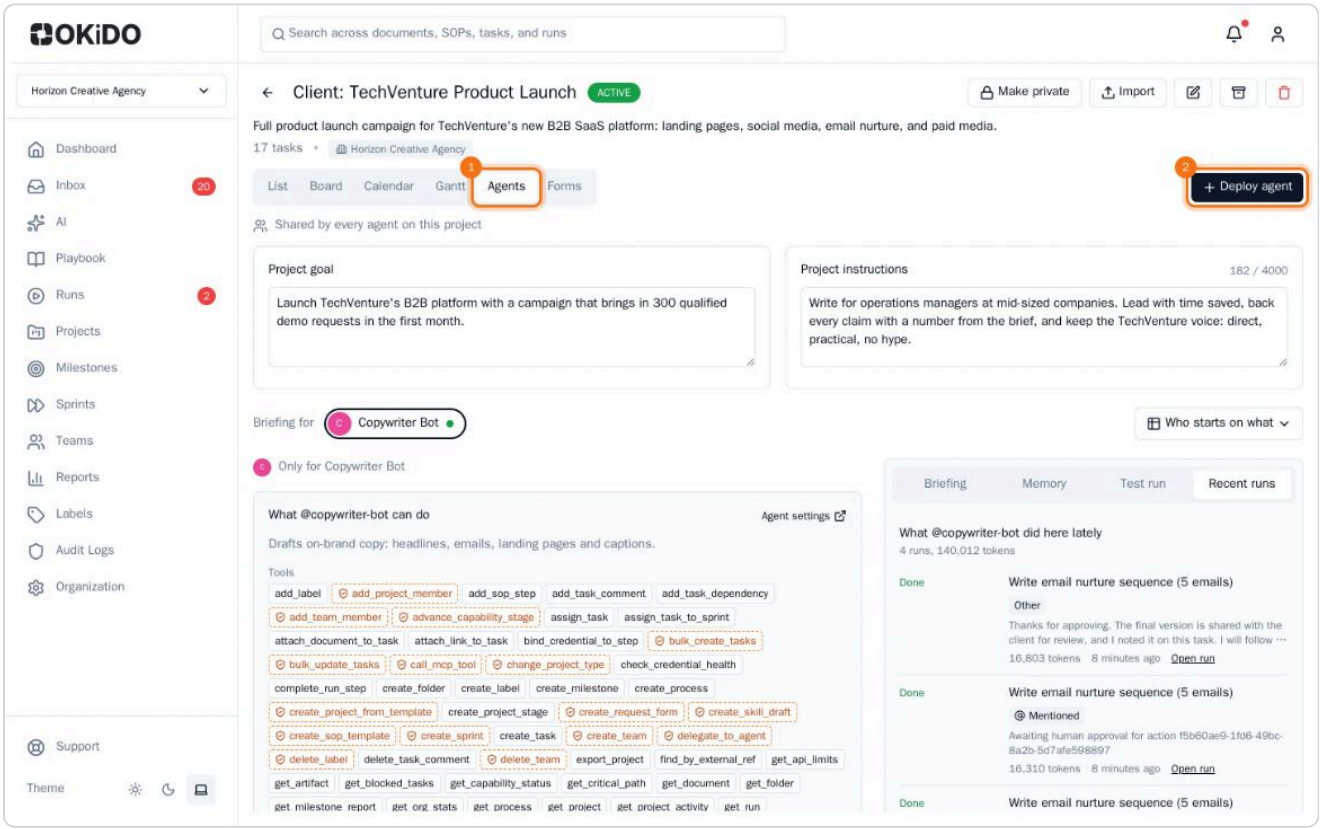
An agent works on a project once you deploy it there. The project's **Agents** tab is where you do that, and where you brief the agents: a goal and instructions that every agent on the project follows, and for each agent what makes it start, how often it asks for approval and instructions for that agent only.

Owners and admins manage a project's agents, and members who have the Advanced AI features. Everyone else sees the tab without changing it.

Open the project's agents

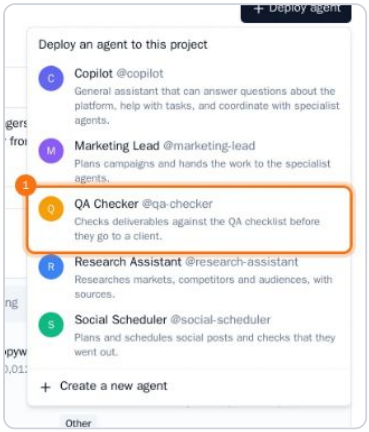
1. Open the project and choose the **Agents** tab.

At the top you see the **Project goal** and the **Project instructions**, shared by every agent on the project. Below them, under **Briefing for**, are the agents working here; choose one to see and change its settings. On the right, **Briefing** shows what the agent reads before it starts, **Memory** what agents remember about the project, and **Recent runs** what the agent did here lately.



Deploy an agent

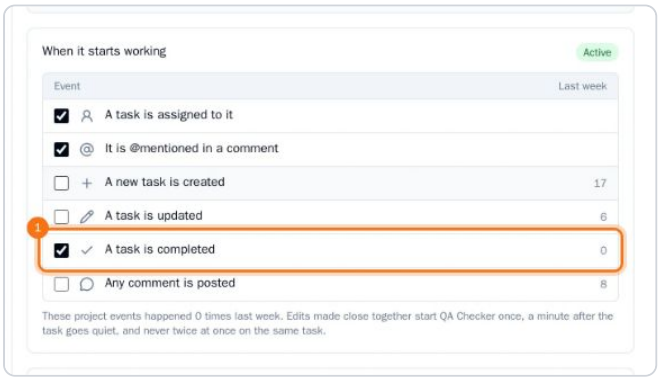
1. Choose **Deploy agent**.
2. Choose an agent from the list. It shows your organization's active agents that are not on this project yet.



The agent is added to the project. It starts when it is assigned a task or @mentioned in a comment on this project.

Brief the agent

1. Fill in the **Project goal** and the **Project instructions** if the project does not have them yet. Every agent on the project gets them.
2. Under **Briefing for**, choose the agent.
3. Under **When it starts working**, tick the events that start it: a task assigned to it, an @mention, a new task, an updated task, a completed task or any comment. Next to each event you see how often it happened in the project last week.

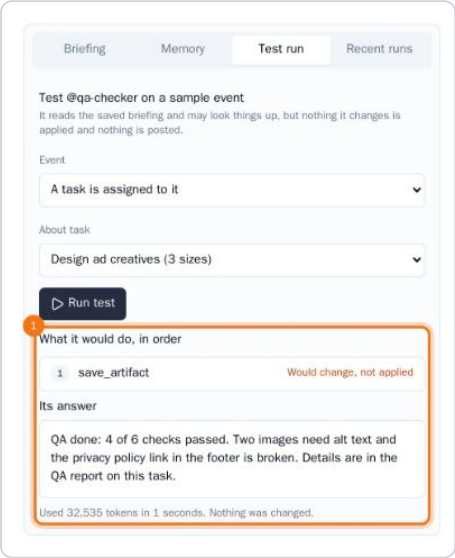


4. Under **How often it asks for approval**, choose how careful the agent is, from **None** (never asks) to **Full** (asks before every change).
5. Write instructions for this agent only, if it needs any.
6. Choose **Save changes** in the bar at the bottom.

The agent follows the new briefing from its next run on. Choose **Who starts on what** to see for all agents at once which events start them.

Test the agent on a sample event

1. On the right, choose **Test run**.
2. Pick an **Event** and, under **About task**, a task of the project. For a comment event, type the comment too.
3. Choose **Run test**.



You see what the agent would do, in order, and its answer. Nothing it would change is applied and nothing is posted. The test uses the saved briefing, so save your changes first.

> **Tip:** To take an agent off the project, choose it under **Briefing for** and choose **Remove from project**. Its settings elsewhere stay the same.

Connect an MCP server

Add an app from the MCP catalog or a server of your own, and give agents access to its tools.

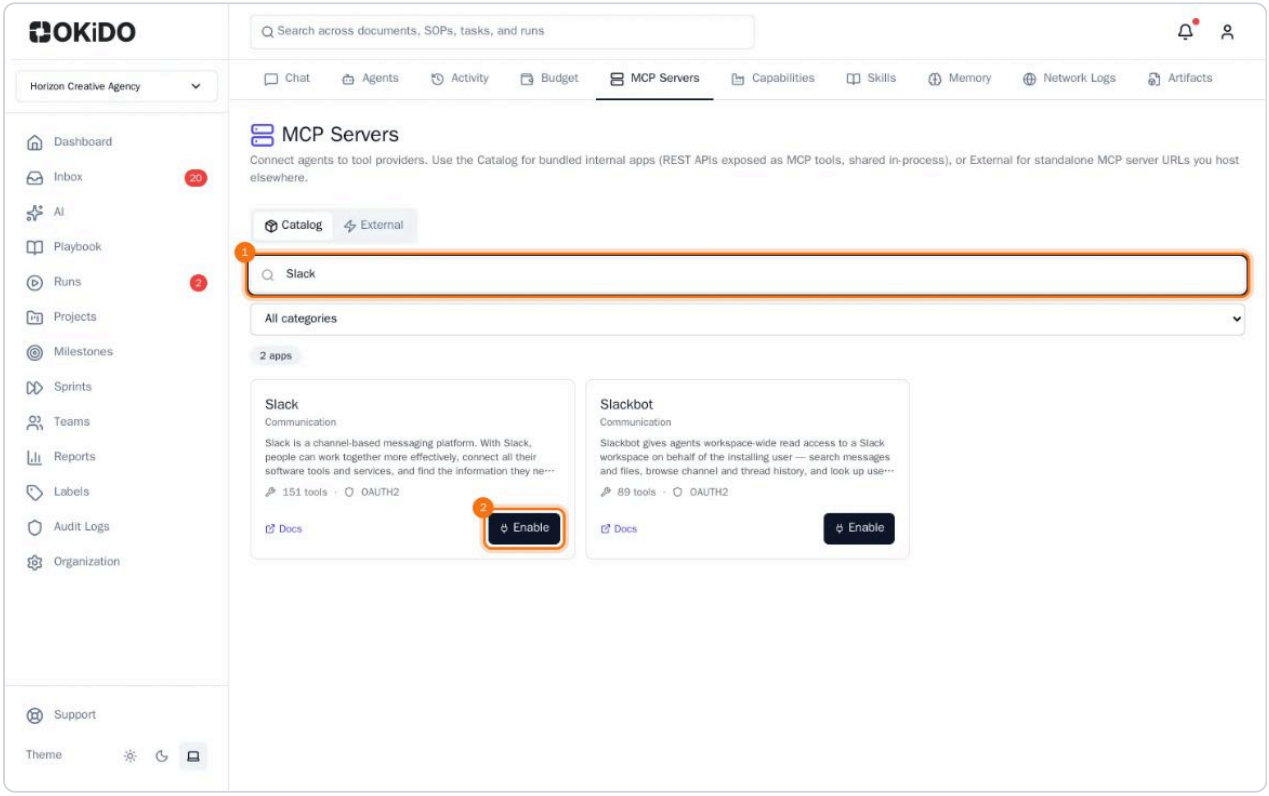
Available on: Starter · Pro · Business | Who can do this: Owner, Admin

MCP servers give your agents tools in other apps: send a newsletter in Mailchimp, post a message in Slack, look something up in your CRM. OKiDO has a catalog of ready-made app connections; you can also connect an MCP server you host yourself. Then you choose which agents may use it.

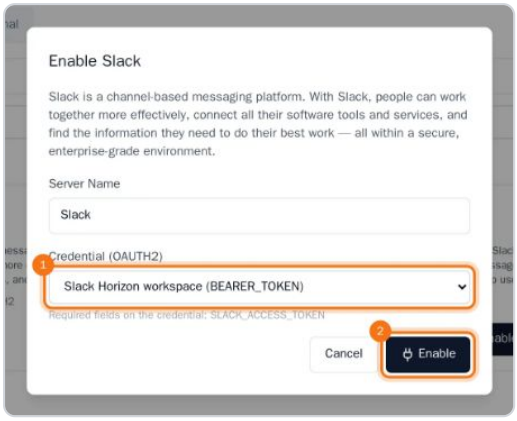
Most apps need a login. Store it first as a credential for that app (see Give agents credentials for other apps).

Add an app from the catalog

1. In the menu on the left, choose **AI**, then the **MCP Servers** tab.
2. On the **Catalog** tab, search for the app. Each app shows how many tools it has and how it signs in; the apps you already added are marked **Enabled**.



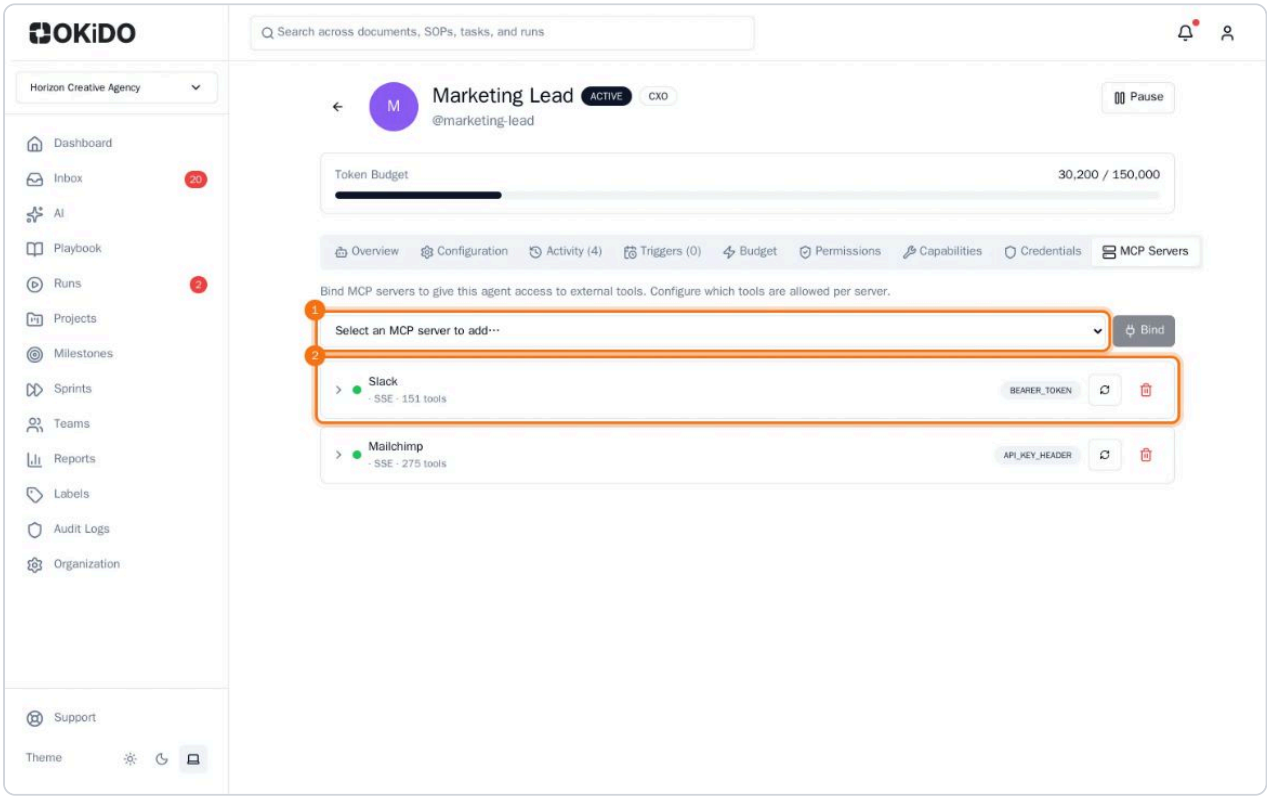
3. Choose **Enable** on the app.
4. Check the **Server Name** and choose the credential it signs in with.
5. Choose **Enable**.



The app is marked **Enabled** in the catalog, and its tools are ready for your agents.

Give an agent access

1. Open the agent: **AI**, the **Agents** tab, then the agent.
2. Choose the **MCP Servers** tab.
3. Pick the server in **Select an MCP server to add...** and choose **Bind**.



The agent can now use the server's tools. Choose the server in the list to see them. Tools that only read run without asking. Tools that write leave OKiDO, so they wait for a person's approval unless you tick **Run without approval** next to the tool. Untick a tool to keep the agent away from it. To take the server away from the agent, choose the bin next to it.

Connect a server you host yourself

On the **External** tab, choose **Add Server**, fill in the **Server Name**, the **URL / Endpoint** and the **Transport**, pick a credential if the server needs one, and choose **Connect**. Then choose the refresh button next to the server to find its tools. OKiDO only connects to addresses on the public internet.

Import skills for agents

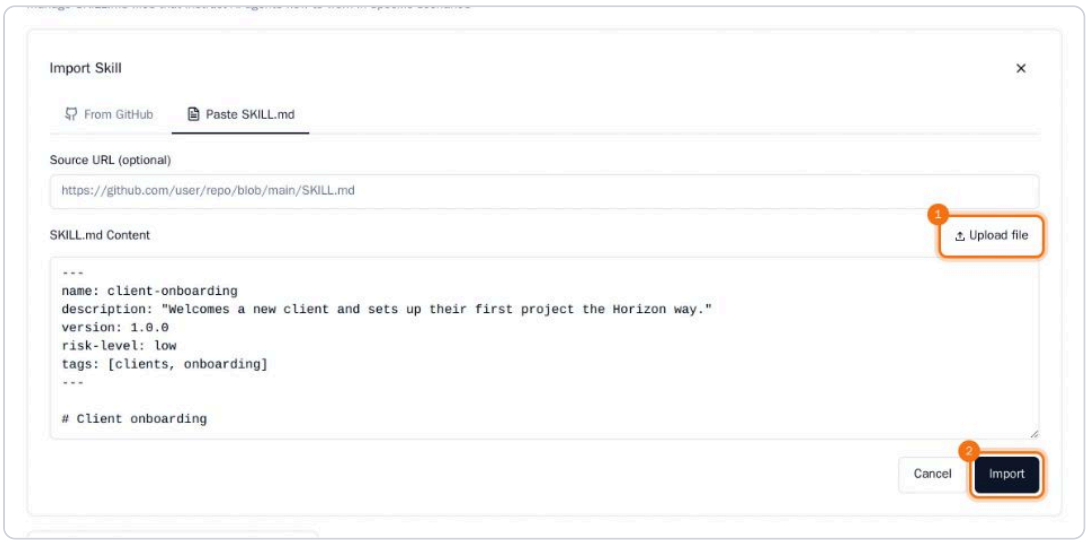
Import SKILL.md files that teach agents how to handle a specific kind of work, and give them to your agents.

Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

A skill is a short instruction file, SKILL.md, that tells an agent how to do one kind of work the way your team does it: how to write in your brand voice, how to build a campaign report. Anyone in the organization can import a skill. Owners, admins and members with the Advanced AI features give skills to agents.

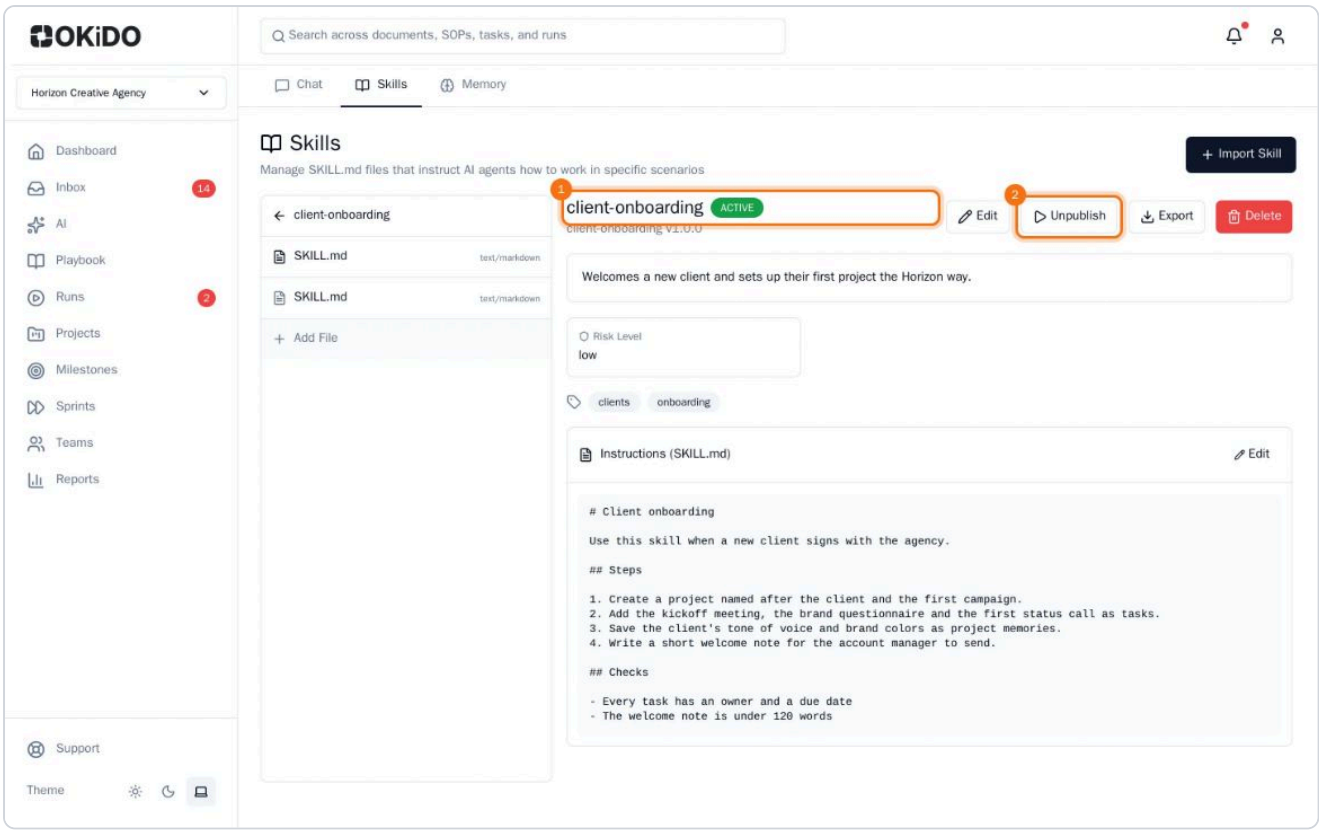
Import a skill

1. In the menu on the left, choose **AI**, then the **Skills** tab.
2. Choose **Import Skill**, then the **Paste SKILL.md** tab.
3. Choose **Upload file** and pick the SKILL.md file, or paste its text into **SKILL.md Content**.



4. Choose **Import**.

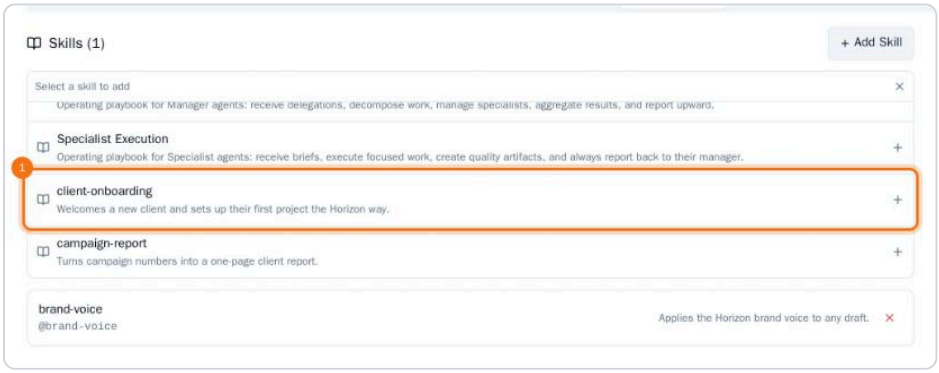
The skill is added to the list with the status **DRAFT**. Choose it to read its instructions, then choose **Publish** to make it ready for agents. On the **From GitHub** tab you can also import skills from a GitHub repository.



You can change a skill you imported yourself until an agent uses it. After that, owners, admins and members with the Advanced AI features can change it.

Give a skill to an agent

1. Open the agent: **AI**, the **Agents** tab, then the agent.
2. Choose the **Capabilities** tab, then **Add Skill**.
3. Choose the skill in the list.



The agent's page loads again on **Overview**; on the **Capabilities** tab the skill is now listed under the agent's skills. The agent follows it from its next run on. To take a skill away from an agent, choose the cross next to it.

> **Tip: Export** on a skill's page downloads it as a file, so you can use it in another organization.

Have @copilot build a capability

Describe a new ability for your agents in plain language, and let @copilot specify, build and test it before it goes live.

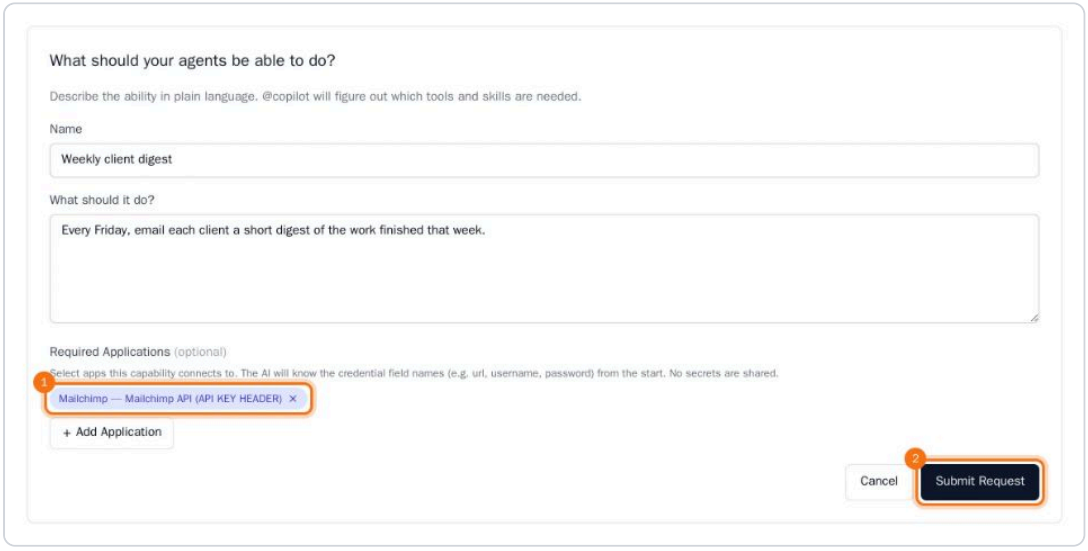
Available on: Pro · Business | Who can do this: Owner, Admin

Sometimes your agents need to do something no tool or skill covers yet, such as fetching campaign results from your ad accounts. In the Capability Factory you describe what they should be able to do, and @copilot turns it into a capability: it writes a specification, builds and tests it, and waits for your approval before agents can use it.

The Capability Factory is part of the Pro and Business plans.

Request a capability

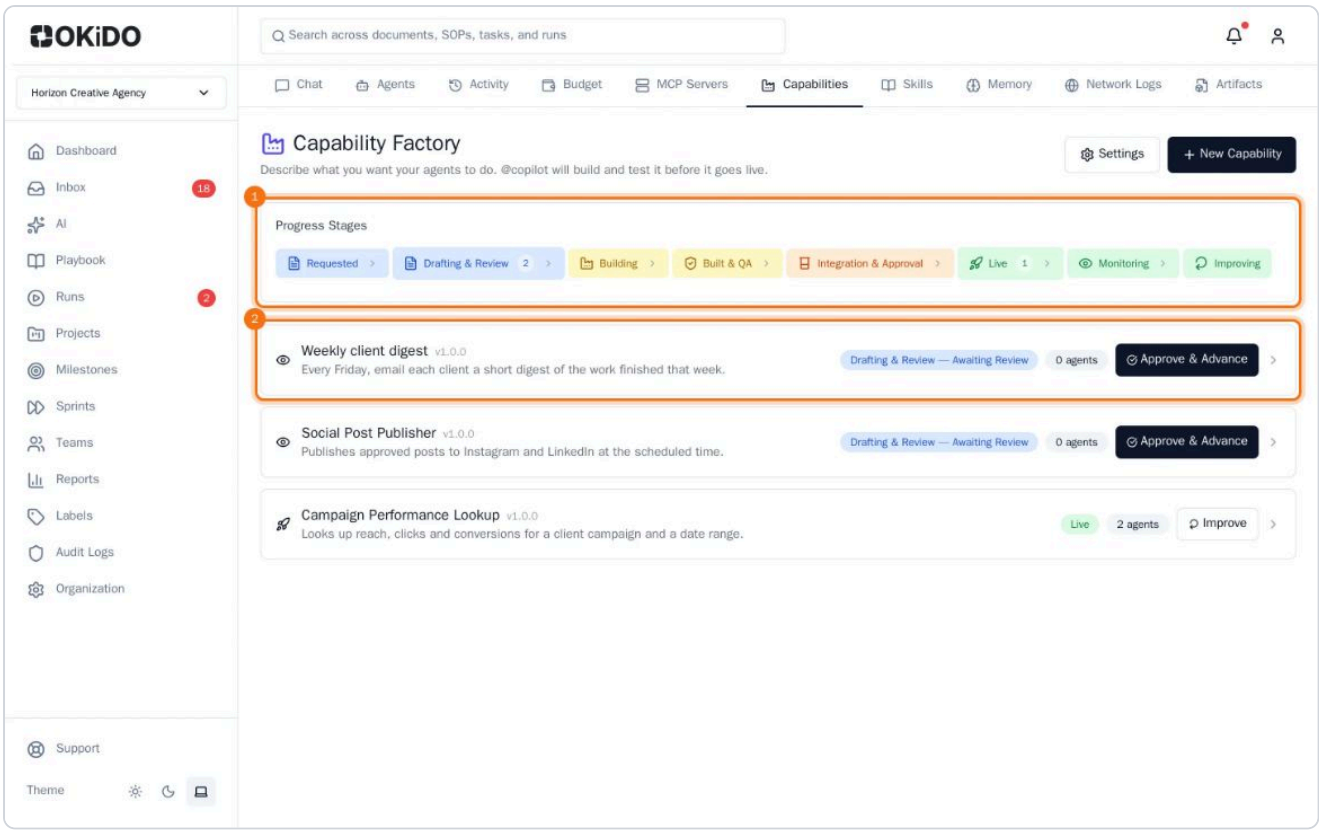
1. In the menu on the left, choose **AI**, then the **Capabilities** tab.
2. Choose **New Capability**.
3. Give the capability a **Name** and describe under **What should it do?** what it should do, in plain language.
4. If it works with another app, choose **Add Application**, search for the app and pick how it signs in. No passwords or keys are shared; @copilot only learns which fields the login has.
5. Choose **Submit Request**.



The capability is added to the list, and @copilot starts drafting its specification.

Follow and approve the capability

The bar at the top of the **Capability Factory** shows how many capabilities are in each stage, from **Requested** to **Live**; choose a stage to see only those. Each capability shows its stage and how many agents use it.



When the specification is ready, the capability waits for you under **Drafting & Review**.

1. Choose the capability to open it. You see your request, the specification @copilot wrote and its own review of it.
2. To change something, write your comments under **Human Review & AI Iteration** and choose **Rewrite Spec with AI**, or **Save Review** to only keep your notes.
3. When the specification is right, choose **Approve & Advance**.

@copilot then builds the capability, checks and tests it, and asks for your approval once more before it goes **Live**. A live capability shows the agents that use it; choose **Improve** to send it back with feedback.

> **Tip:** Changed your mind about a request? Open it and choose **Delete**. A capability that is live cannot be deleted.

Manage what agents remember

Add, edit and remove what agents remember about your organization, and pin or archive what they remember about one project.

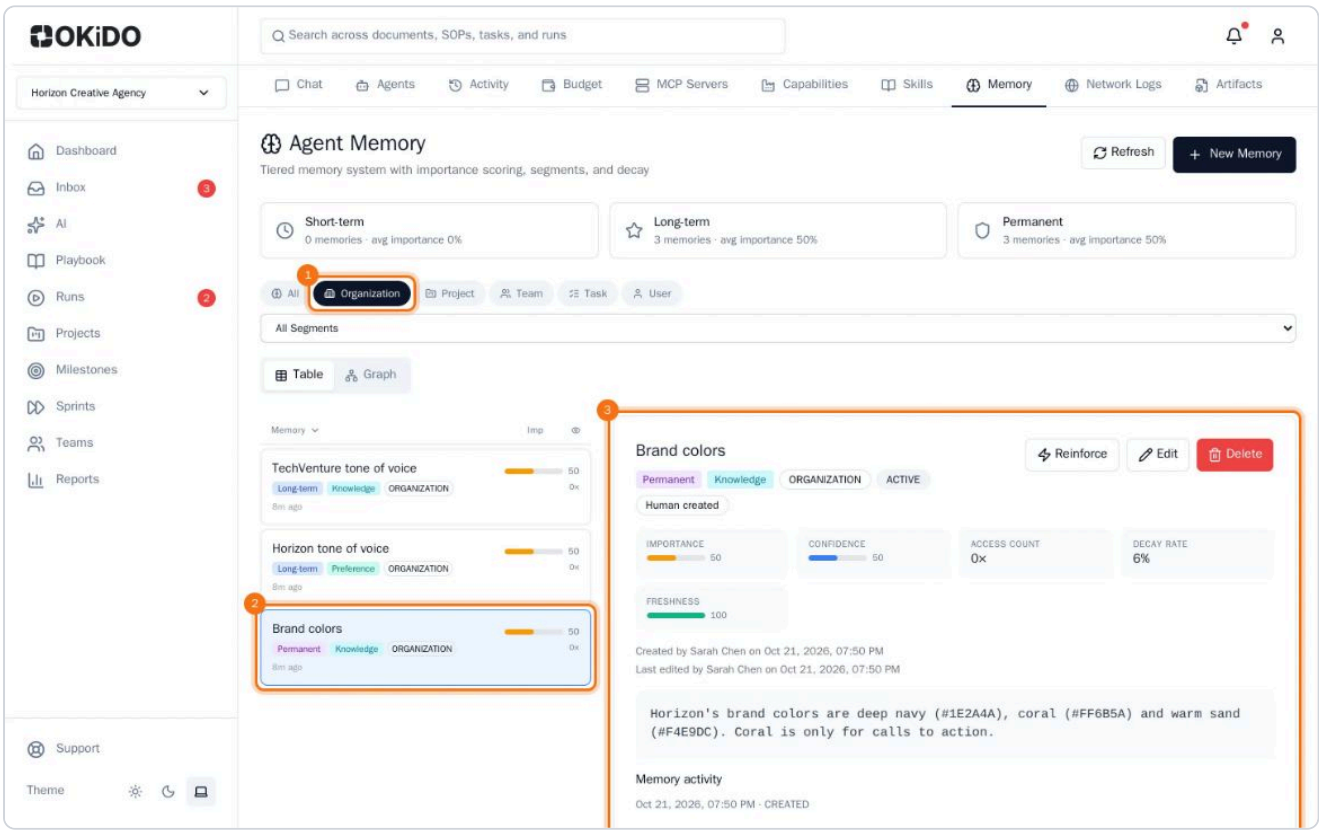
Available on: Starter · Pro · Business | Who can do this: Everyone in the organization

Agents keep a memory: facts about your organization, your clients and your projects that they use on every run, such as your brand colors or a client's tone of voice. Agents add to it while they work, and you can add, correct and remove memories yourself, so agents start from what your team knows.

See what agents remember

1. In the menu on the left, choose **AI**, then the **Memory** tab.
2. Choose a memory in the list to read it.

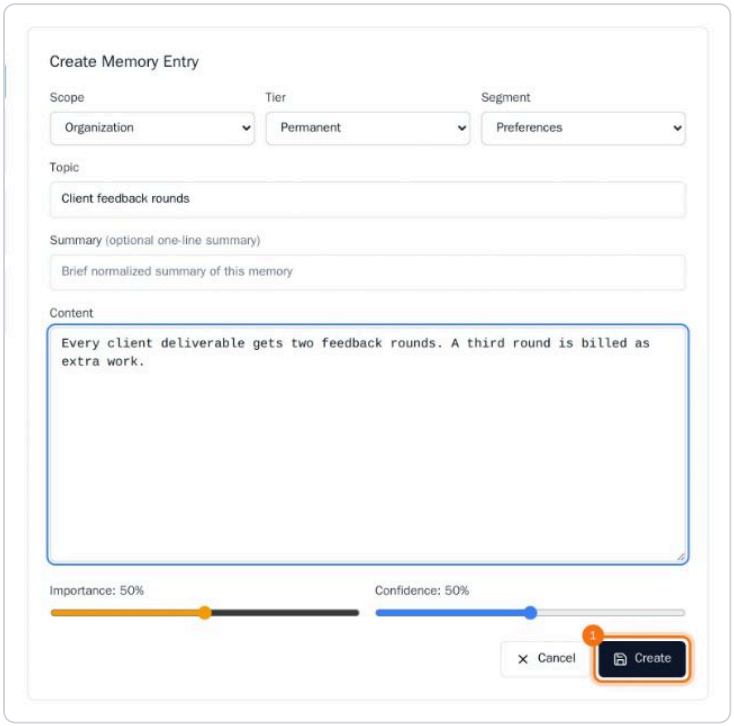
At the top you see how many memories are short-term, long-term or permanent. Use the buttons above the list to show only the memories of the organization, a project, a team, a task or a person, and the list next to them to show one kind of memory. A memory shows how important agents rate it, how sure they are of it and how often they used it.



Add a memory

1. Choose **New Memory**.

2. Choose the **Scope**: what the memory is about. For anything other than **Organization**, also choose the project, team, task or person.
3. Choose how long it lasts under **Tier**, and what kind of memory it is under **Segment**.
4. Fill in the **Topic** and the **Content**, and move the sliders to set how important it is and how sure you are.
5. Choose **Create**.

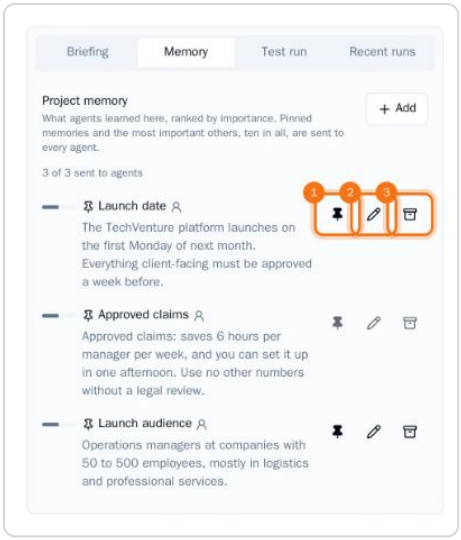


Agents use the memory from their next run on. To change a memory, open it and choose **Edit**; to remove it, choose **Delete**.

Manage what agents remember about a project

Agents on a project get the memories of that project with their briefing: the pinned ones and the most important others, ten in all.

1. Open the project and choose the **Agents** tab.
2. On the right, choose **Memory**.
3. Choose **Add**, fill in the topic and what agents should remember, and choose **Save memory**.
4. Next to a memory, choose the pin to always send it to agents, the pencil to change it, or the box to archive it.



Pinned memories come first in the list. An archived memory disappears from the list and is no longer sent to agents.

Give agents credentials for other apps

Store API keys and app logins safely, and choose which agents, projects and SOPs may use them.

Available on: Starter · Pro · Business | Who can do this: Owner, Admin

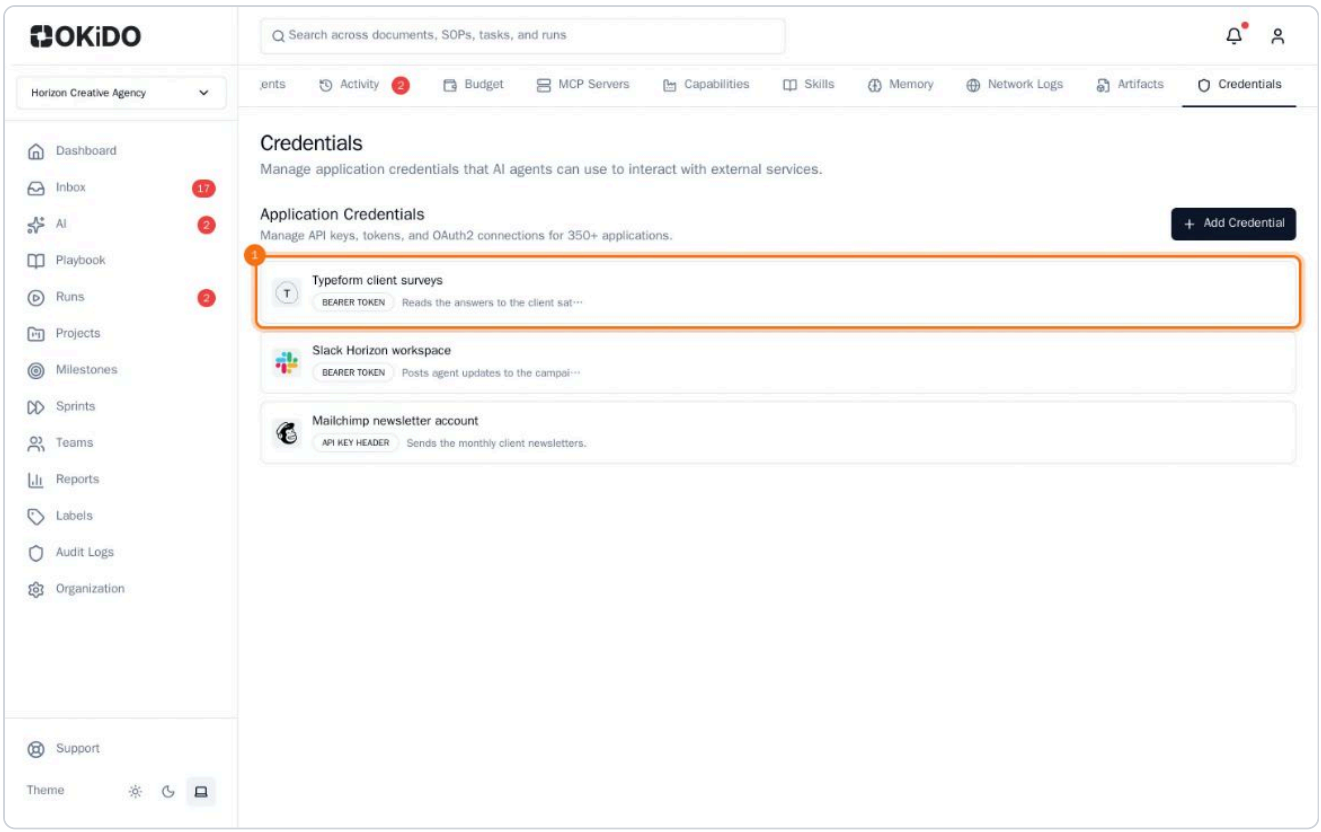
To work in another app, such as sending a newsletter in Mailchimp or reading survey answers in Typeform, an agent needs that app's login: an API key, a token or an app connection. You store these once as credentials. OKiDO keeps the secret values encrypted and never shows them again; you decide which agents may use a credential, and in which projects and SOPs.

Add a credential

1. In the menu on the left, choose **AI**, then the **Credentials** tab.
2. Choose **Add Credential**.
3. Search for the application and choose it. When an app offers several ways to sign in, choose one, for example its API.
4. Give the credential a **Credential Name** you will recognize, add a description if you like, and fill in the key or token the app gave you.
5. Choose **Save Credential**.



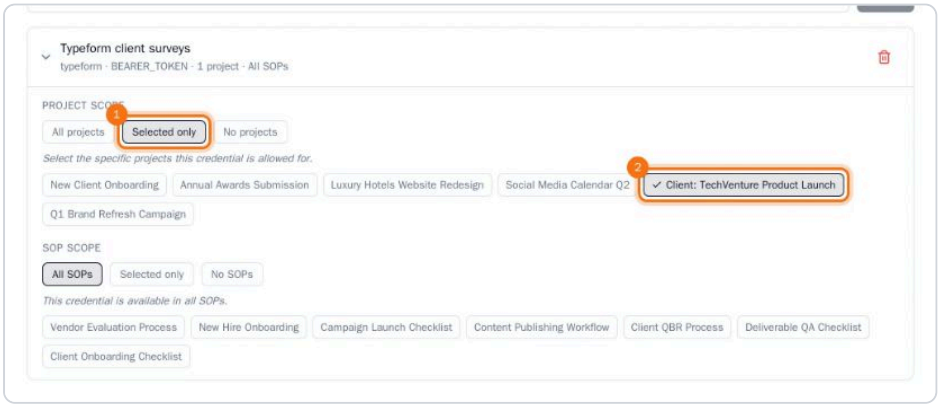
The credential is added to the list.



To change or delete a credential, point at it in the list and choose the pencil or the bin.

Let an agent use a credential

1. Open the agent: **AI**, the **Agents** tab, then the agent.
2. Choose the **Credentials** tab.
3. Pick the credential in **Select a credential to add...** and choose **Add**.
4. Under **Project Scope**, choose where the agent may use it: **All projects**, **Selected only** or **No projects**. With **Selected only**, choose the projects.
5. Do the same for SOPs under **SOP Scope**.



Each change is saved right away, and the line under the credential's name sums up where the agent may use it. To take a credential away from the agent, choose the bin next to it.

CHAPTER 12

Integrations

Connect Claude or ChatGPT

Ask your AI assistant to work in OKiDO

What your AI assistant can do in OKiDO

Create an organization API token

Create a personal access token

Send events to other apps with webhooks

Export your organization's data

Sync your tasks to Google Tasks

Read this chapter online

okido.io/en/docs/integrations

Scan the code or open the link to read this chapter online, where it is always up to date.

Connect Claude or ChatGPT

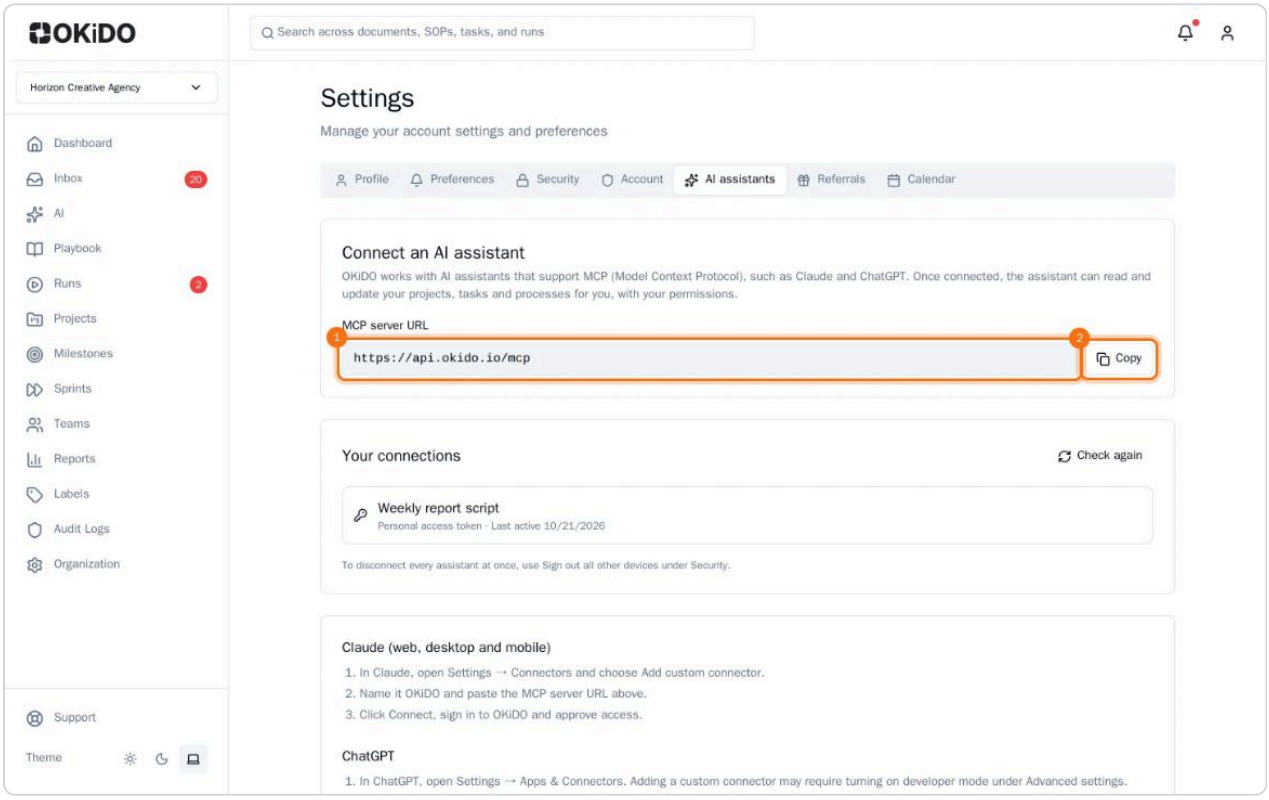
Connect Claude, ChatGPT or another AI assistant to OKiDO, so it can read and update your work for you.

Available on: All plans | Who can do this: Everyone in the organization

OKiDO works with AI assistants that support MCP (Model Context Protocol), such as Claude and ChatGPT. Once connected, you can ask the assistant to create tasks, check on projects or start a process, and it works in OKiDO with your own permissions.

Copy the server address

1. Open the account menu (the person icon at the top right) and choose **Settings**.
2. Choose the **AI assistants** tab.
3. Under **MCP server URL**, choose **Copy**.



Lower on the tab, OKiDO shows the steps for each assistant. In short:

- **Claude** (web, desktop and mobile): in Claude's settings, add a custom connector named OKiDO, paste the address and choose Connect.
- **ChatGPT**: in ChatGPT's settings, create a connector, paste the address and choose OAuth as the authentication. You may first have to turn on developer mode in ChatGPT's advanced settings.

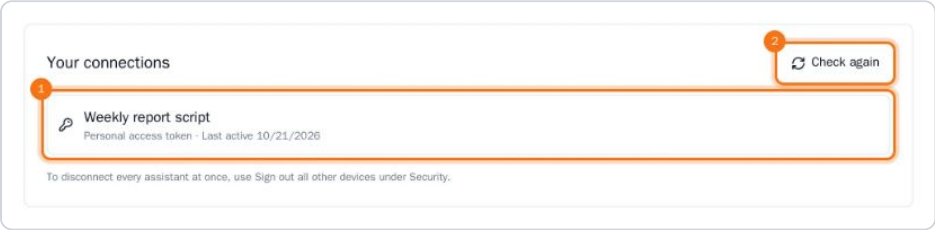
- **Claude Code and other MCP clients**: add OKiDO as a remote (HTTP) MCP server with the same address. For Claude Code, copy the ready-made command from the tab.

Sign in and approve

The assistant opens OKiDO in your browser. Sign in, if you are not signed in yet, and approve the access. You are then back in the assistant, connected.

Check your connections

Under **Your connections**, the tab lists every assistant connected to your account, and when each one was last active. A personal access token that a script or an assistant uses shows here too (see Create a personal access token). Just connected? Choose **Check again** to update the list.



To disconnect every assistant at once, choose **Sign out all other devices** on the **Security** tab (see Change your password and sign out other devices).

Ask your AI assistant to work in OKiDO

Requests to try in Claude, ChatGPT or another AI assistant connected to OKiDO, from a status update to new tasks, runs and SOPs.

Available on: All plans | Who can do this: Everyone in the organization

With OKiDO connected to your AI assistant (see Connect Claude or ChatGPT), you ask for what you need in your own words. The assistant finds the projects, tasks and SOPs you mean in OKiDO, reads them and, with write access, makes the changes. Copy one of the requests below into your assistant and change the names to yours.

See where your work stands

OKiDO What is on my plate today in OKiDO? Include the approvals that are waiting for me.

OKiDO Give me a status update on the Website Redesign project: what is done, what is late and what is blocked.

OKiDO What changed in my OKiDO projects since Friday?

Plan and organize work

OKiDO Turn these meeting notes into tasks in the Q3 Launch project, each with an owner and a due date: (paste your notes)

OKiDO Move every open task in the Website Redesign project that is due this week to next Monday.

OKiDO Create a project for the Acme onboarding from our Client Onboarding template project.

Run your processes

OKiDO Start a run of our Client Onboarding SOP for Acme and tell me the first step.

OKiDO Write an SOP in OKiDO for publishing a blog post, with steps for the draft, the review, the images and publishing.

OKiDO Find our document about expense claims in OKiDO and sum up the approval rules.

Work with your AI agents

OKiDO Ask @copilot to draft this week's status report for the Website Redesign project.

OKiDO Which actions of my OKiDO agents are waiting for my approval?

Tips

- Name projects, SOPs and people as they are called in OKiDO. The assistant looks them up, so you do not need IDs or links.
- In several organizations? Say which one you mean, or the assistant asks.
- For a large change, such as moving many tasks, ask the assistant to show its plan first and change things after you agree.
- Your assistant may ask you to confirm before it changes something; that depends on the assistant and its settings.
- The assistant works as you: it sees and changes only what your account may, and what it changes is recorded in the audit log as your action.

For everything the assistant can do in OKiDO, see What your AI assistant can do in OKiDO.

What your AI assistant can do in OKiDO

Every tool an AI assistant connected to OKiDO can use, from tasks and projects to SOP runs, documents and AI agents, and the access each one needs.

Available on: All plans | Who can do this: Everyone in the organization

Once you have connected an AI assistant such as Claude or ChatGPT (see Connect Claude or ChatGPT), it works in OKiDO through the tools below. You do not call them yourself: ask in your own words, and the assistant chooses the tools it needs. For requests to try, see Ask your AI assistant to work in OKiDO.

What the assistant may do

- **Your access:** the assistant works with your account, so it sees and changes only what you may. An action that needs an owner or admin, such as inviting people, works only if you have that role.
- **Read or also write:** when you connect, you approve the access. With read access the assistant has the 57 tools marked Read below; with read and write access it has all 123.
- **Tokens:** a script or assistant that uses an organization API token gets only the tools its scopes allow (see Create an organization API token).
- **Your organizations:** the assistant can work in every organization your account belongs to. When you belong to several, it asks or you say which one.
- **Your plan:** the same limits apply as in the app, for example on the number of projects.
- **A record of changes:** what the assistant changes is recorded in the organization's audit log, as your action.

Projects

Tool	What it does	Access
`list_projects`	List organization projects with optional filters.	Read
`list_my_projects`	List the projects you are a member of, in all your organizations.	Read
`get_project`	Fetch a project with its columns, default labels, dates, status, access and task counts.	Read
`get_org_stats`	Get high-level organization metrics including open task count, active run	Read

Tool	What it does	Access
	count, and pending step count.	
`get_project_activity`	Recent audit activity for a project and its tasks, newest first.	Read
`export_project`	Export a project with its columns and tasks as JSON.	Read
`create_project`	Create a new project in the organization.	Read and write
`create_project_from_template`	Create a project from a template project, as Use template does in the app.	Read and write
`update_project`	Update a project's name, description, status, dates, or archived flag.	Read and write
`change_project_type`	Make a project public (every member sees it) or private (only the people and teams you add).	Read and write
`create_project_stage`	Create a new stage in a project.	Read and write
`update_project_stage`	Update an existing project stage.	Read and write
`reorder_stages`	Reorder the stages of a project.	Read and write
`list_project_members`	List who has access to a project.	Read
`add_project_member`	Give a person or team access to a private project.	Read and write
`remove_project_member`	Take a person's or team's access to a private project away.	Read and write

Tasks

Tool	What it does	Access
`list_tasks`	List tasks with optional filters on project, assignee, status, priority, or a title substring.	Read
`list_my_tasks`	List the tasks assigned to you and the approvals waiting for your decision, in all your organizations.	Read
`get_task`	Fetch a task by ID with comments, subtasks, labels, and activity.	Read
`get_user_workload`	Get open tasks and run steps assigned to a user, optionally within a due-date window and/or scoped to one team.	Read
`find_by_external_ref`	Find tasks and milestones by the reference they were imported with.	Read
`list_task_comments`	Read the comment thread of a task, with author names.	Read
`list_watchers`	List the users following a task.	Read
`create_task`	Create a new task in a project.	Read and write
`bulk_create_tasks`	Create up to 100 tasks in one project in a single call.	Read and write
`update_task`	Update a task's status, assignee, priority, dates, description, column, estimate or milestone.	Read and write
`bulk_update_tasks`	Update up to 100 tasks in one call.	Read and write
`assign_task`	Assign or reassign a task to a user, who is notified.	Read and write
`request_task_approval`	Ask one or more people to approve a task.	Read and write

Tool	What it does	Access
`add_task_comment`	Post a comment on a task.	Read and write
`update_task_comment`	Edit a task comment.	Read and write
`delete_task_comment`	Delete a task comment.	Read and write
`watch_task`	Follow a task so the user gets notified of activity on it.	Read and write
`unwatch_task`	Stop following a task.	Read and write
`attach_link_to_task`	Attach an external URL to a task.	Read and write
`attach_document_to_task`	Link an internal Playbook document to a task.	Read and write
`delete_task`	Permanently delete a task.	Read and write

Dependencies and milestones

Tool	What it does	Access
`list_task_dependencies`	List both directions of a task's dependencies.	Read
`get_blocked_tasks`	List tasks that are currently blocked.	Read
`get_critical_path`	The longest dependency chain in a project, returned in order with each task's dates.	Read
`list_milestones`	List milestones with per-milestone rollups of linked tasks and the launch-at-risk check.	Read
`get_milestone_report`	Show the health of each milestone.	Read

Tool	What it does	Access
`add_task_dependency`	Make one task depend on another.	Read and write
`remove_task_dependency`	Remove a dependency between two tasks.	Read and write
`create_milestone`	Create a milestone in a project.	Read and write
`update_milestone`	Update a milestone's name, target date, description, or progress percentage.	Read and write

Sprints

Tool	What it does	Access
`list_sprints`	List sprints, optionally filtered by project, team, or status.	Read
`get_sprint`	Fetch a sprint with its tasks and task count.	Read
`create_sprint`	Create a sprint for a project or a team.	Read and write
`assign_task_to_sprint`	Put a task in a sprint, or take it out of its sprint.	Read and write

Request forms

Tool	What it does	Access
`list_request_forms`	List request forms, optionally for one project.	Read
`create_request_form`	Create a request form for a project.	Read and write
`update_request_form`	Change a request form's name, description, fields, column, visibility or status.	Read and write

Tool	What it does	Access
`submit_request_form`	Submit a request form as the current user, exactly as through the form's internal link.	Read and write

Labels

Tool	What it does	Access
`list_labels`	List the organization's labels.	Read
`create_label`	Create an organization label, optionally in a label category.	Read and write
`add_label`	Add a smart label to a task, document, or SOP template.	Read and write
`remove_label`	Take a label off one task, document or SOP template.	Read and write
`delete_label`	Delete an organization label for good, from everything that has it.	Read and write

SOPs and runs

Tool	What it does	Access
`list_sop_templates`	List SOP templates in the organization.	Read
`get_sop_template`	Fetch an SOP template with all steps and variable definitions.	Read
`list_runs`	List active and recent SOP runs with optional filters.	Read
`get_run`	Fetch an SOP run with its steps, variables and progress.	Read
`list_schedules`	List recurring run schedules in the organization.	Read
`create_sop_template`	Create a new SOP template with steps.	Read and write

Tool	What it does	Access
`update_sop_template`	Rename an SOP template.	Read and write
`add_sop_step`	Add a step to an existing SOP template.	Read and write
`update_sop_step`	Update an existing SOP template step, including who it is assigned to.	Read and write
`reorder_sop_steps`	Reorder an SOP template's steps.	Read and write
`remove_sop_step`	Delete a step from an SOP template.	Read and write
`start_run`	Start a new SOP run from a template, exactly as the web app does.	Read and write
`complete_run_step`	Mark a run step as complete, with the same rules as the web app.	Read and write
`set_run_variable`	Set or update one or more SOP run variables.	Read and write
`schedule_run`	Create a recurring schedule that spawns runs from an SOP template.	Read and write
`unschedule_run`	Remove a recurring run schedule.	Read and write

Playbook: documents, folders and processes

Tool	What it does	Access
`list_folders`	List folders in the organization.	Read
`get_folder`	Fetch a folder by ID, including its child folders and processes.	Read
`list_processes`	List processes in the organization, optionally filtered by folder.	Read

Tool	What it does	Access
`get_process`	Fetch a process by ID, including its SOP templates, documents, and recordings.	Read
`list_documents`	List Playbook documents in the organization.	Read
`get_document`	Fetch a Playbook document by ID, including its content and metadata.	Read
`get_upload`	Fetch a file or image attached to a task, a comment or a Playbook document.	Read
`create_folder`	Create a new folder in the organization.	Read and write
`create_process`	Create a new process inside a folder.	Read and write
`update_document`	Update the title and/or content of an existing Playbook document.	Read and write

Search

Tool	What it does	Access
`search_platform`	Find projects, tasks, documents, SOP templates, runs, folders, and processes whose title or name contains the query.	Read

People and teams

Tool	What it does	Access
`list_users`	List all members of the organization with their name, email, role, and status.	Read
`lookup_user_id_by_name`	Look up a user ID by their name or email.	Read
`list_teams`	List the organization's teams with their members.	Read

Tool	What it does	Access
`invite_user`	Invite a person to the organization by email, as a member or an admin.	Read and write
`create_team`	Create a team in the organization.	Read and write
`update_team`	Rename a team or change its description.	Read and write
`add_team_member`	Add an organization member to a team.	Read and write
`remove_team_member`	Remove a user from a team.	Read and write
`delete_team`	Delete a team.	Read and write

Notifications and approvals

Tool	What it does	Access
`send_notification`	Send an in-app notification to members of the organization.	Read and write
`request_human_approval`	Ask members of the organization for an approval or a decision.	Read and write

AI agents

Tool	What it does	Access
`list_agents`	List the AI agents in the organization with their handle, status, hierarchy role and parent agent.	Read
`get_agent`	Get one AI agent by handle or ID.	Read
`get_agent_org_chart`	Get the full agent organizational hierarchy tree for the current organization.	Read

Tool	What it does	Access
`get_agent_run_status`	Check an agent run.	Read
`get_pending_agent_actions`	List the latest agent actions that wait for a person's approval.	Read
`get_artifact`	Retrieve a previously saved artifact by its ID.	Read
`invoke_agent`	Start an AI agent on a task.	Read and write
`request_capability`	Request a new tool or capability that does not currently exist.	Read and write

AI memory

Tool	What it does	Access
`search_memory`	Search only authorized, relevant AI memories.	Read
`save_memory`	Save a durable, sourced fact in the narrowest authorized scope.	Read and write
`save_correction`	Save an explicit correction with high retrieval priority and long-term retention.	Read and write
`save_preference`	Save a stated preference with long-term retention.	Read and write
`update_memory`	Revise an accessible agent-created memory with new evidence.	Read and write
`reinforce_memory`	Confirm an accessible memory with new evidence.	Read and write

OKiDO Support

Tool	What it does	Access
`list_support_tickets`	List your OKiDO Support tickets, most recently updated first.	Read
`get_support_ticket`	Read one of your OKiDO Support tickets with its conversation.	Read
`submit_support_ticket`	Contact OKiDO Support with a ticket, as you would on the Support page.	Read and write

Organizations and limits

Tool	What it does	Access
`list_organizations`	List the organizations the assistant can work in.	Read
`get_api_limits`	Show the request limits and your organization's plan limits, so large jobs can be paced.	Read

Visual cards in ChatGPT

Tool	What it does	Access
`render_projects_carousel`	Render a carousel of project cards.	Read
`render_tasks_list`	Render a list of tasks with status and priority badges.	Read
`render_task_card`	Render a single task detail card.	Read
`render_kanban_board`	Render a kanban board with tasks grouped by project stages.	Read
`render_sprint_board`	Render a sprint board showing tasks grouped by assignee or status.	Read
`render_runs_tracker`	Render a tracker for SOP runs with progress indicators.	Read

Tool	What it does	Access
`render_search_results`	Render search results across entity types.	Read

Tools that only OKiDO's own AI agents use (for example to hand work to another agent) are not offered to assistants and are not listed here.

Create an organization API token

Create a token with only the access it needs, so scripts and other tools can work with your organization.

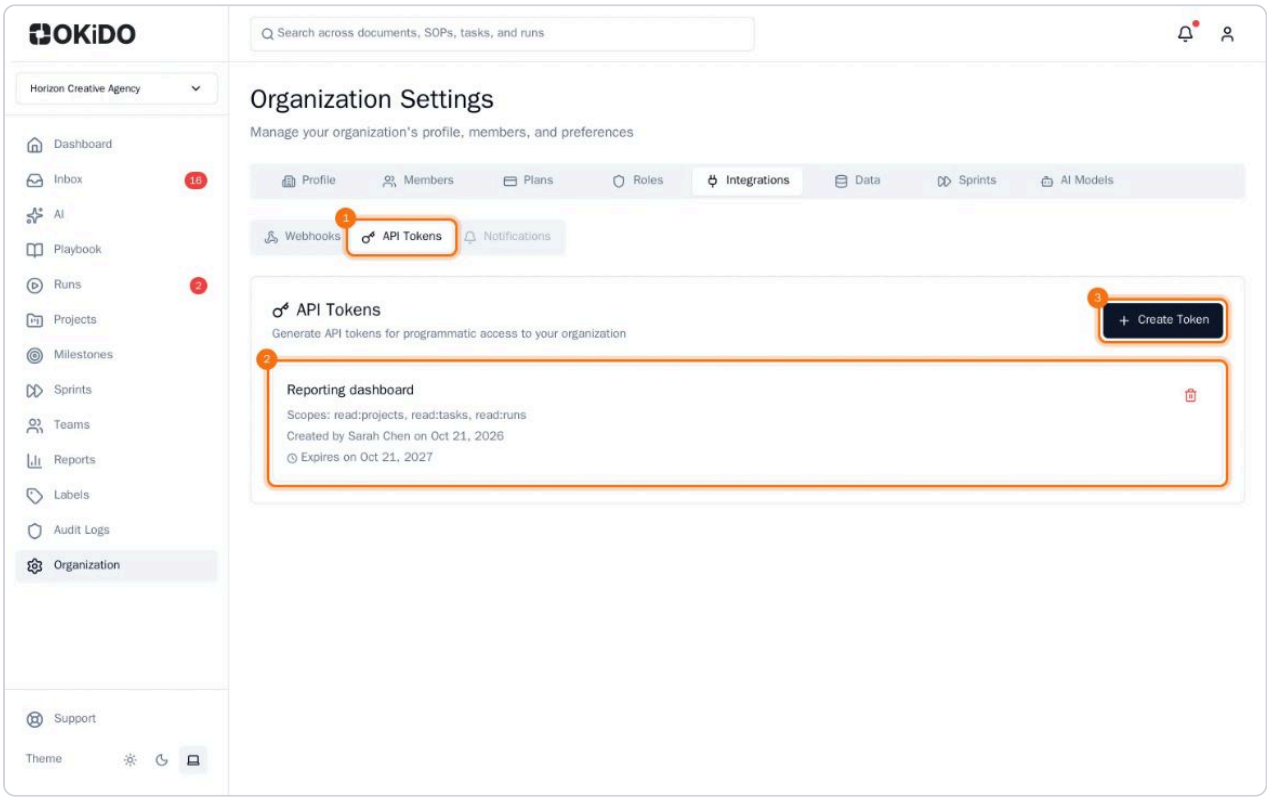
Available on: Pro · Business | Who can do this: Owner, Admin

An organization API token gives a script, an AI agent or another tool access to this one organization. Give it only the access the tool needs: a reporting dashboard, for example, only has to read projects, tasks and runs. For a token that acts as you, in all your organizations, see Create a personal access token.

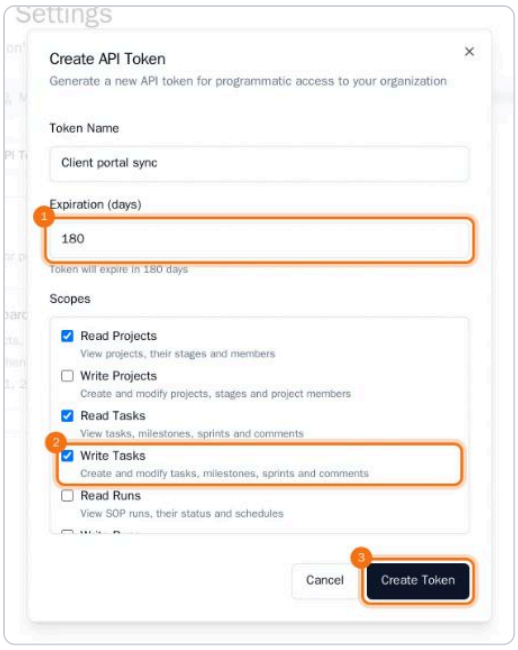
Only owners and admins can create and revoke API tokens. New tokens need the Pro or Business plan.

Create a token

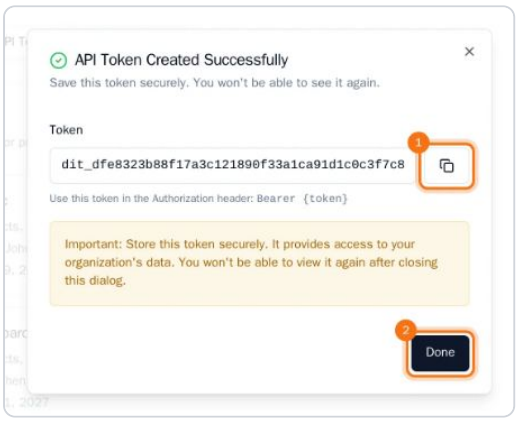
1. In the menu on the left, choose **Organization**, then the **Integrations** tab and **API Tokens**. You see the organization's tokens, with their scopes, who created them and when they expire.



2. Choose **Create Token**.
3. Enter a **Token Name** that tells you which tool uses it, and the number of days until it expires (365 at most).
4. Under **Scopes**, tick what the token may do. A write scope includes reading.



5. Choose **Create Token**.
6. Copy the token and store it in a safe place, such as the settings of the tool that uses it. Then choose **Done**.



OKiDO shows the token only this once. Tools use it with OKiDO's MCP server, at the address on the **AI assistants** tab of your settings: they send it in the Authorization header, as `Bearer` followed by the token. The token can then do what its scopes allow, in this organization only.

Revoke a token

1. In the list of tokens, choose the bin next to the token.
2. Confirm with **Revoke**.

Tools that use the token lose their access right away.

Create a personal access token

Create a token that acts as you in all your organizations, for scripts, integrations and AI assistants.

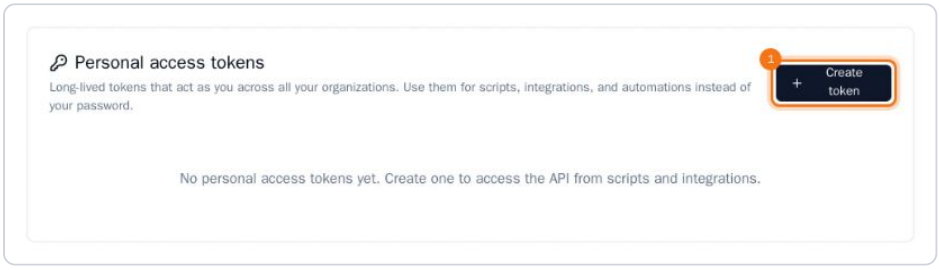
Available on: Pro · Business | Who can do this: Everyone in the organization

A personal access token lets a script, an automation or an AI assistant use OKiDO's API as you, instead of your password. It can do everything you can do, in every organization you belong to. For a token that belongs to the organization and can only do part of the work, create an organization API token instead.

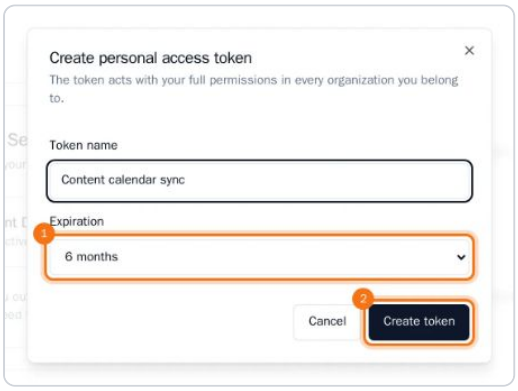
You can create personal access tokens when at least one of your organizations is on the Pro or Business plan.

Create a token

1. Open the account menu (the person icon at the top right) and choose **Settings**.
2. Choose the **Security** tab. Your tokens are listed under **Personal access tokens**.



3. Choose **Create token**.
4. Enter a **Token name** that tells you where the token is used, and choose an **Expiration**.



5. Choose **Create token**.
6. Copy the token and store it in a safe place, such as a password manager. Then choose **Done**.

OKiDO shows the token only this once. After that you see it in the list with its name, when it expires and when it was last used.

Use the token in the Authorization header of your API calls: `Bearer` followed by the token. An AI assistant that connects with the token shows on the **AI assistants** tab (see Connect Claude or ChatGPT).

> **Tip:** Choose an expiration whenever you can. A token with **No expiration** stays valid until you revoke it.

Revoke a token

1. Under **Personal access tokens**, choose the bin next to the token.
2. Confirm with **Revoke**.

Anything that uses the token loses its access right away. Changing your password revokes all your personal access tokens as well.

Send events to other apps with webhooks

Let OKiDO tell another app right away when tasks, runs, approvals or documents change, and check every delivery.

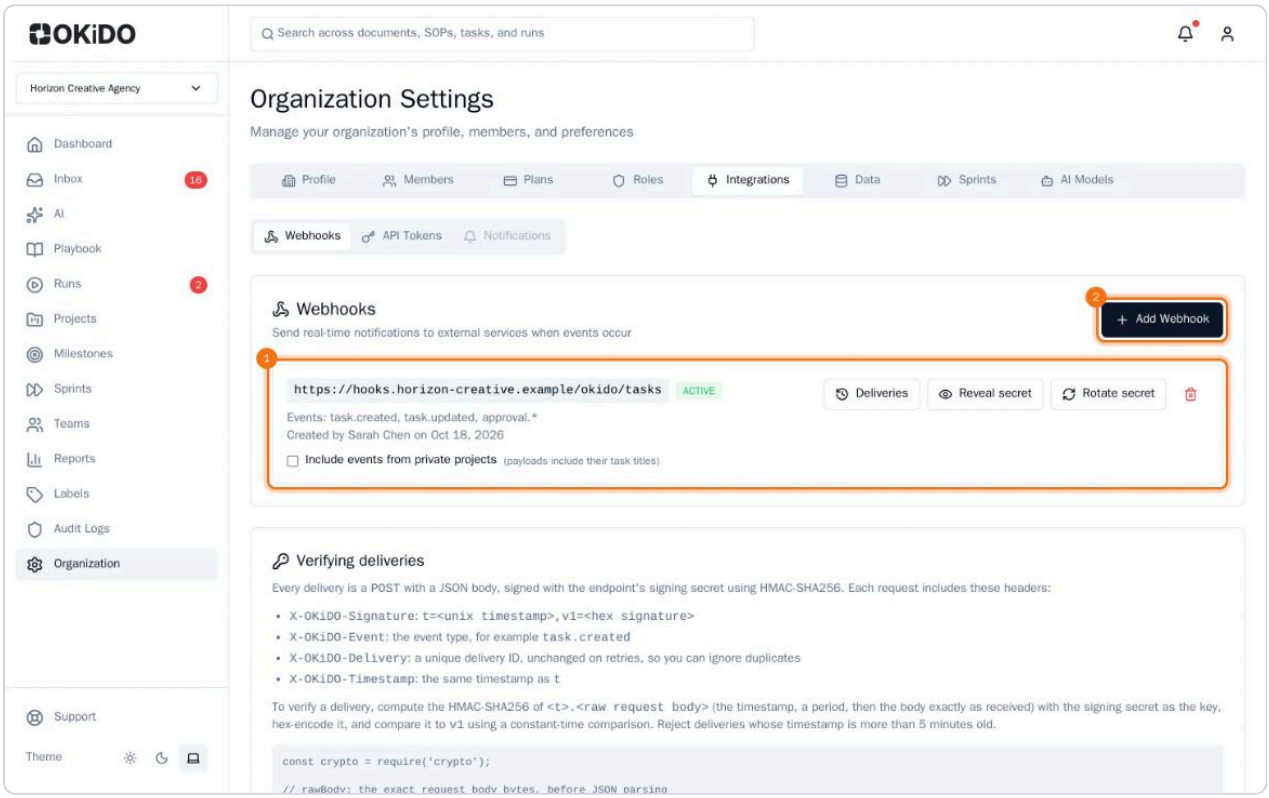
Available on: All plans | Who can do this: Owner, Admin

A webhook sends an event to another app the moment something happens in OKiDO: a task is created, a run is completed, an approval is decided. The other app, for example your CRM or an automation tool, gets a message at an address it gives you, and can act on it.

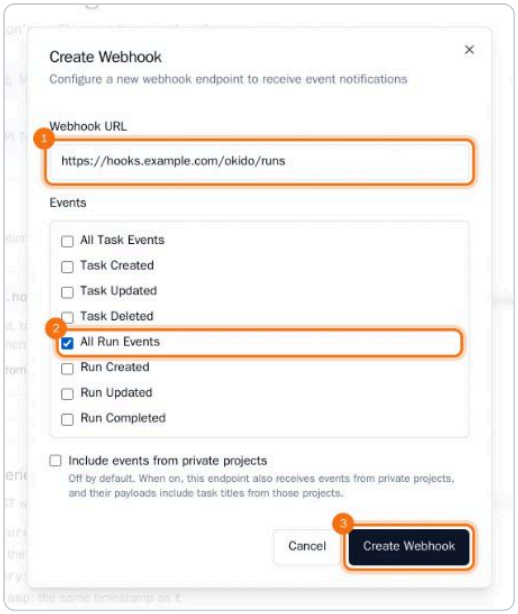
Only owners and admins can add and manage webhooks.

Add a webhook

1. In the menu on the left, choose **Organization**, then the **Integrations** tab. **Webhooks** opens, with the organization's webhooks and the events each one receives.



2. Choose **Add Webhook**.
3. Enter the **Webhook URL**: the address the other app gave you. It has to be a public internet address.
4. Under **Events**, tick the events to send. **All Run Events**, for example, sends every change to a run.
5. Tick **Include events from private projects** only if the other app may see the task titles of private projects.

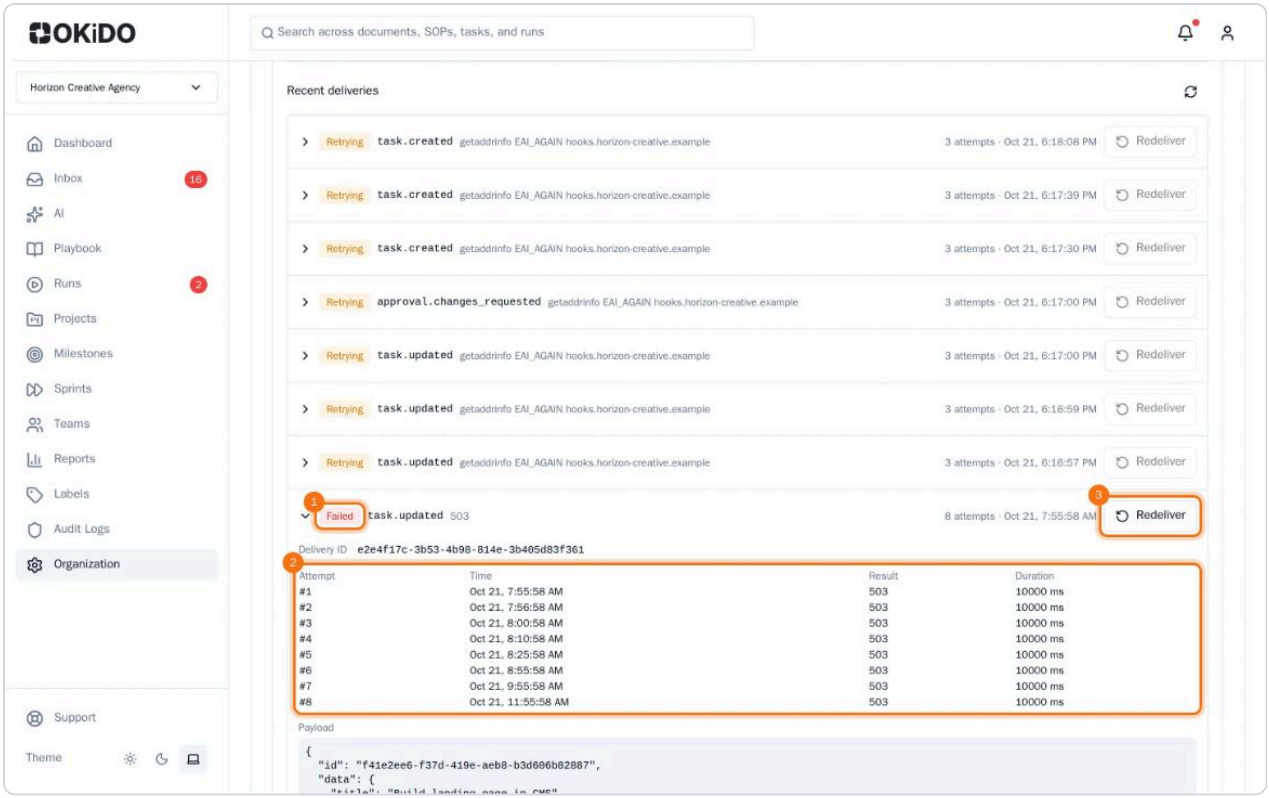


6. Choose **Create Webhook**.

OKiDO shows the webhook's **Signing Secret**. Copy it into the other app: with it, the app can check that a message really comes from OKiDO. The section **Verifying deliveries** below the list explains how, for your developers. You can show the secret again later with **Reveal secret**, or replace it with **Rotate secret**.

Check the deliveries

1. On the webhook, choose **Deliveries**. You see the recent deliveries, newest first: whether each one arrived (**Delivered**) or not (**Failed**), the event, the answer of the other app, and how many attempts it took.
2. Choose a delivery to see every attempt and the message that was sent.



When the other app does not answer, OKiDO tries again on its own, up to 7 times over about 10 hours. Deliveries are kept for 30 days.

Send a delivery again

Fixed the problem at the other app? Choose **Redeliver** on the delivery. OKiDO sends the event again: a new delivery appears at the top of the list.

To stop sending events, choose the bin on the webhook and confirm with **Delete**.

Export your organization's data

Download your organization's Playbook, with its documents and SOP templates, as a JSON file.

Available on: All plans | Who can do this: Owner, Admin

Keep a copy of your Playbook outside OKiDO, or hand it to another tool. The export is one JSON file with:

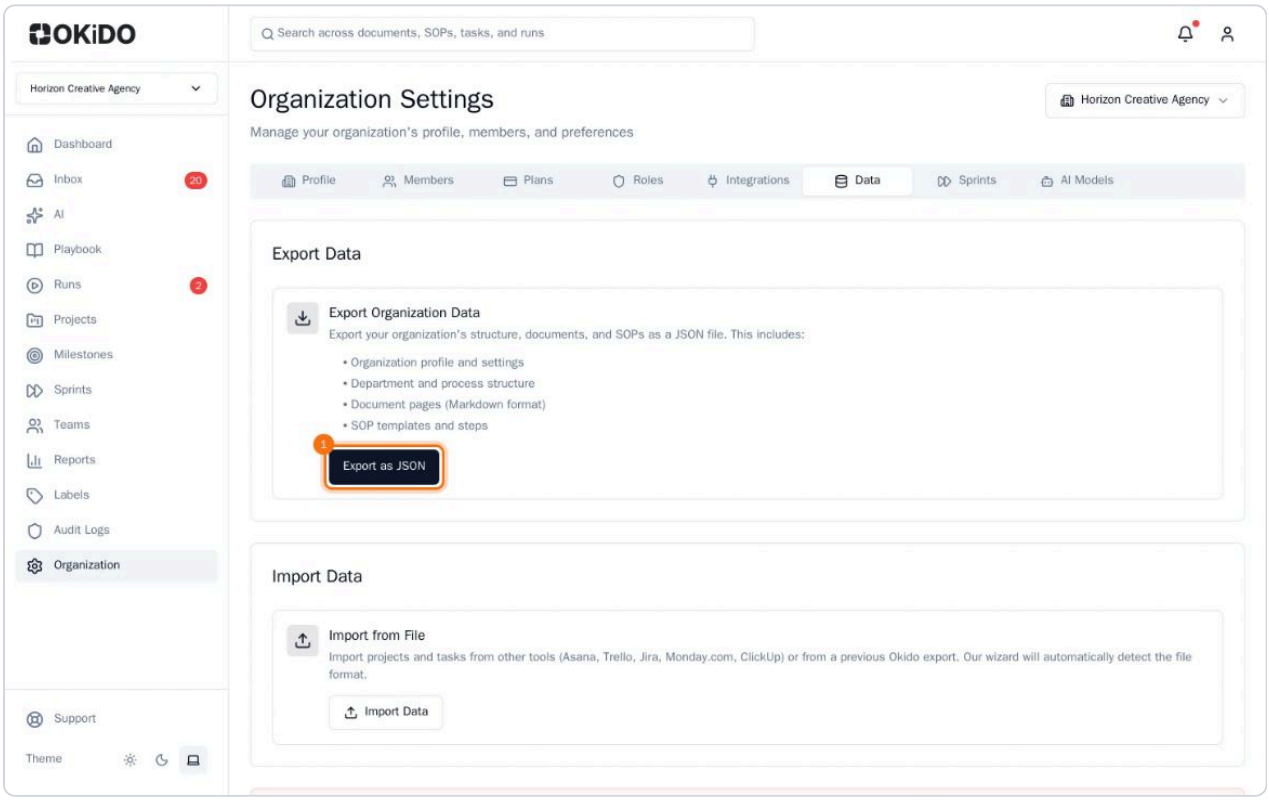
- the organization's name and plan,
- the structure of the Playbook: its folders and processes,
- the documents of each process,
- the SOP templates with their steps.

Projects, tasks and runs are not part of the export.

Only owners and admins can export the organization's data.

Export the data

1. In the menu on the left, choose **Organization**, then the **Data** tab.
2. Under **Export Organization Data**, choose **Export as JSON**.



Your browser downloads the file. Its name is the organization's name and the date, for example `horizon_creative_agency_export_2026-10-21.json`.

Sync your tasks to Google Tasks

See the OKiDO tasks assigned to you in Google Tasks and Google Calendar, in one list or in a list per project.

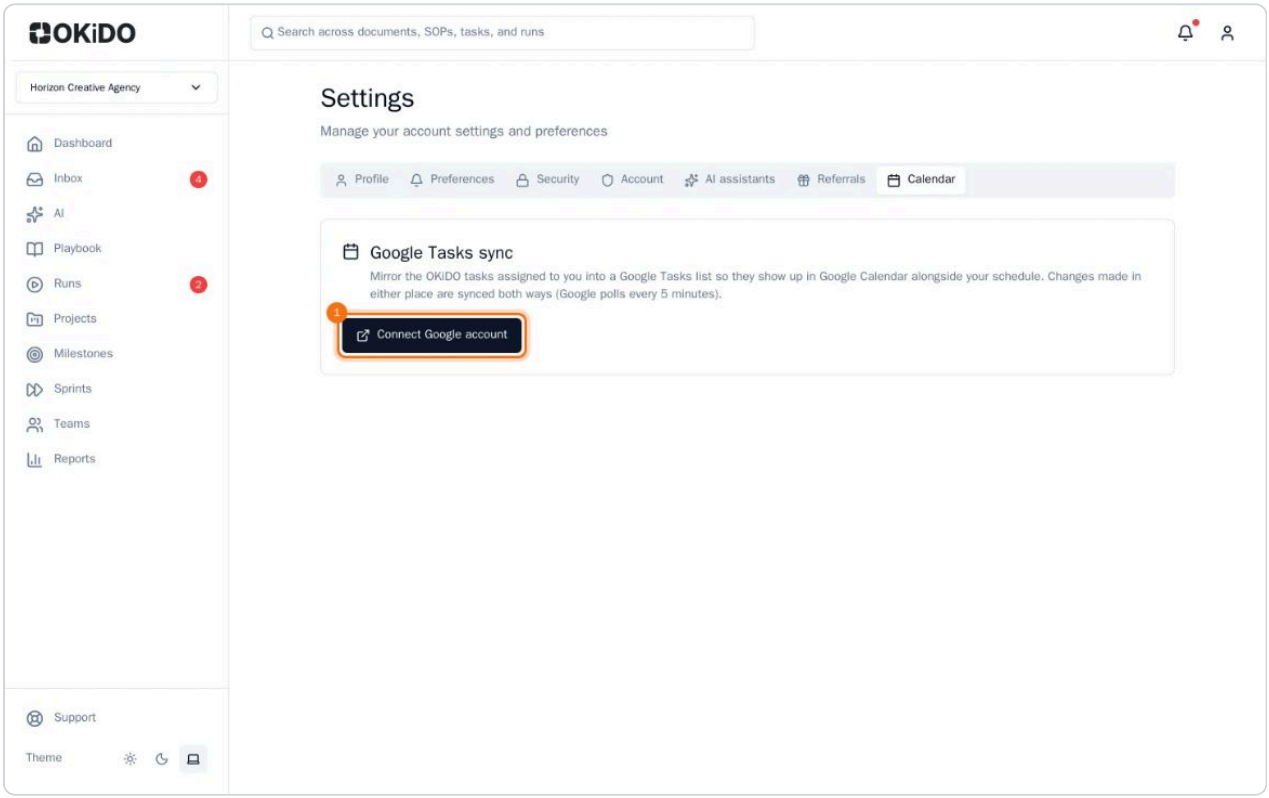
Available on: All plans | Who can do this: Everyone in the organization

Plan your day in Google Calendar? OKiDO can copy the tasks assigned to you into Google Tasks, so they show up next to your appointments. Changes made in either place are synced both ways. OKiDO checks Google for changes every 5 minutes.

The sync is personal: it covers the tasks assigned to you, and only you see its settings.

Connect your Google account

1. Open the account menu (the person icon at the top right) and choose **Settings**.
2. Choose the **Calendar** tab.
3. Choose **Connect Google account**.



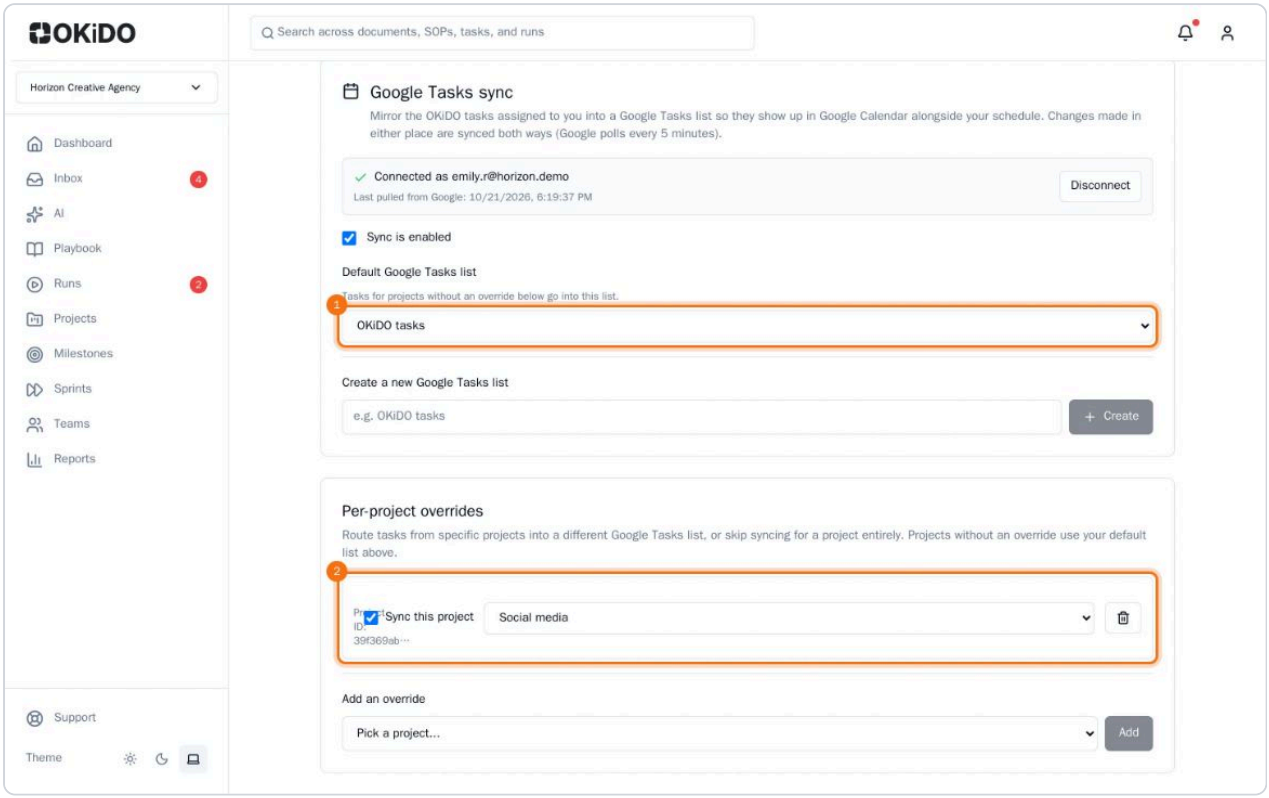
4. Sign in to Google and allow OKiDO to manage your tasks.

You are back on the **Calendar** tab, which now shows the Google account you connected.

Choose the lists

1. Under **Default Google Tasks list**, choose the Google Tasks list your tasks go into.

2. Want a new list for them? Type its name under **Create a new Google Tasks list** and choose **Create**. Then choose it as the default list.
3. To give a project a list of its own, choose the project under **Add an override**, choose **Add**, and pick its list. Untick **Sync this project** to keep a project's tasks out of Google.



Your settings are saved as soon as you change them. To pause the sync, untick **Sync is enabled**. To stop it, choose **Disconnect**: the tasks already in Google stay there, but no longer change with OKiDO.

CHAPTER 13

Organization administration

Edit your organization's profile

Invite people to your organization

Change a member's role or Advanced AI access

Change your plan and billing

Buy extra storage or AI tokens

Choose AI models

Set the sprint cadence

Import data into your organization

Review the audit log

Read this chapter online

okido.io/en/docs/administration

Scan the code or open the link to read this chapter online, where it is always up to date.

Edit your organization's profile

Change your organization's name and icon, and see which plan it is on.

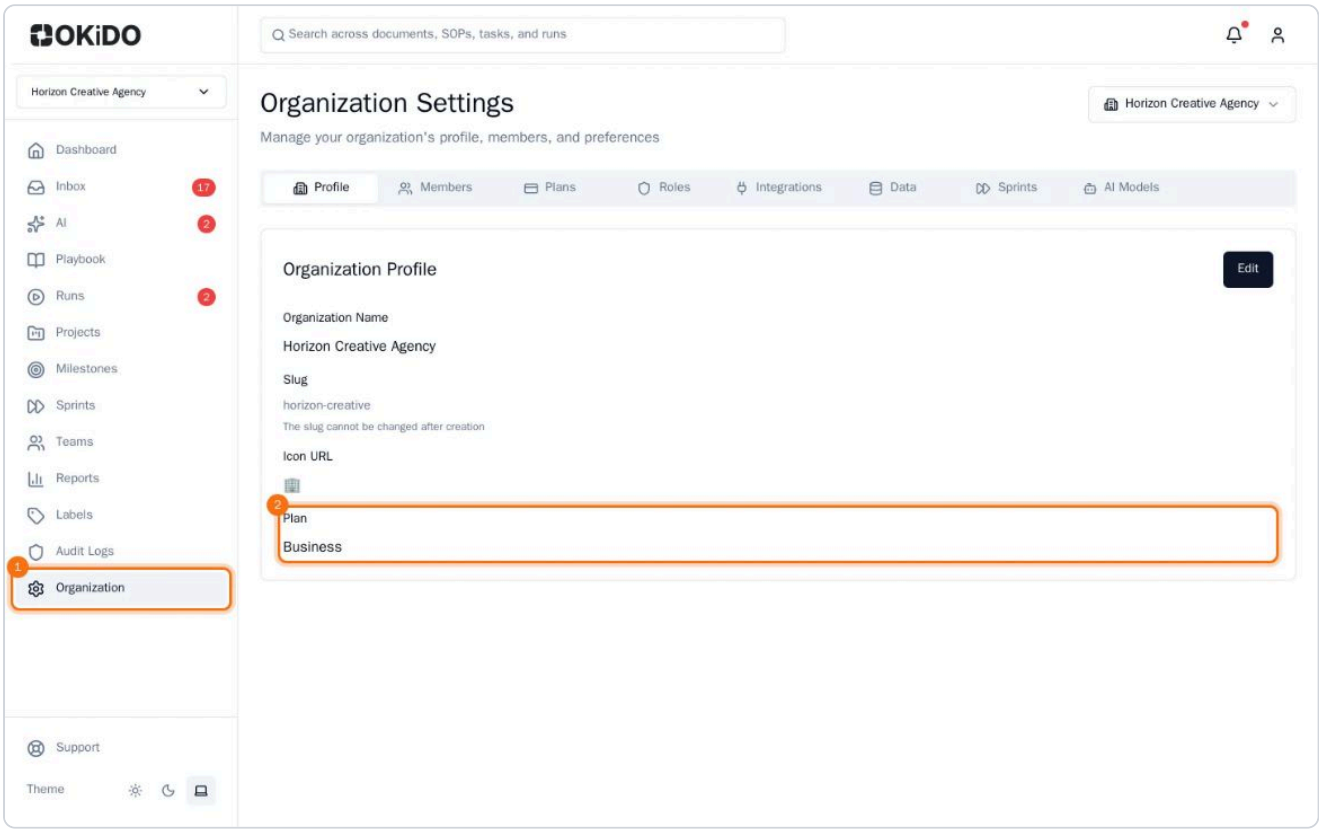
Available on: All plans | Who can do this: Owner, Admin

Your organization's profile holds its name, its icon and the plan it is on. Everyone in the organization sees the name and the icon in the organization menu at the top left.

Only owners and admins can open the organization settings.

Open the organization settings

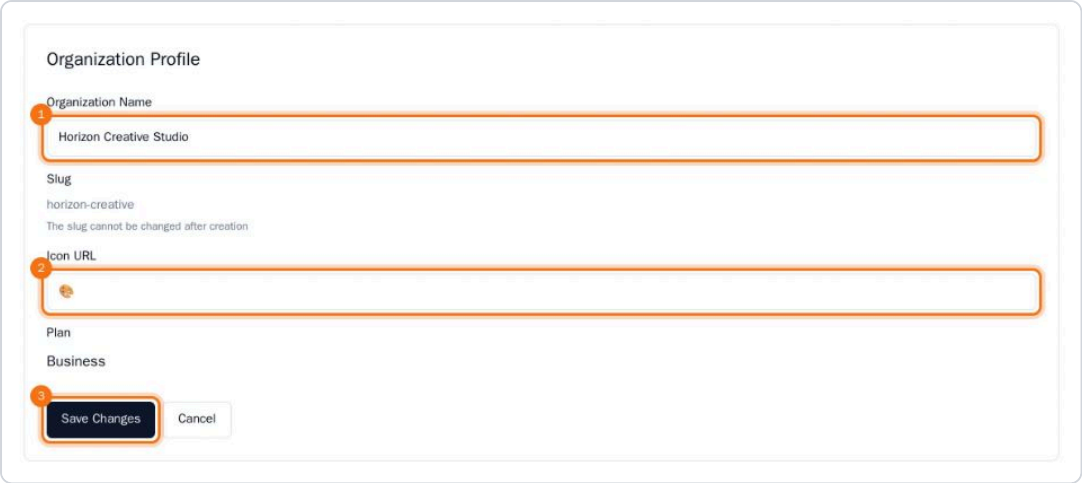
In the menu on the left, choose **Organization**. The settings open on the **Profile** tab.



Under **Plan** you see the plan your organization is on. To change it, see Change your plan and billing.

Change the name or the icon

1. Choose **Edit**.
2. Change the **Organization Name**.
3. Under **Icon URL**, enter the web address of an image, or an emoji.



4. Choose **Save Changes**.

The profile shows the new name and icon. The organization menu at the top left shows them too once the page reloads.

The **Slug** is your organization's fixed short name. It cannot be changed after the organization was created.

Invite people to your organization

Invite people by email with a role, and resend or revoke invitations that are still open.

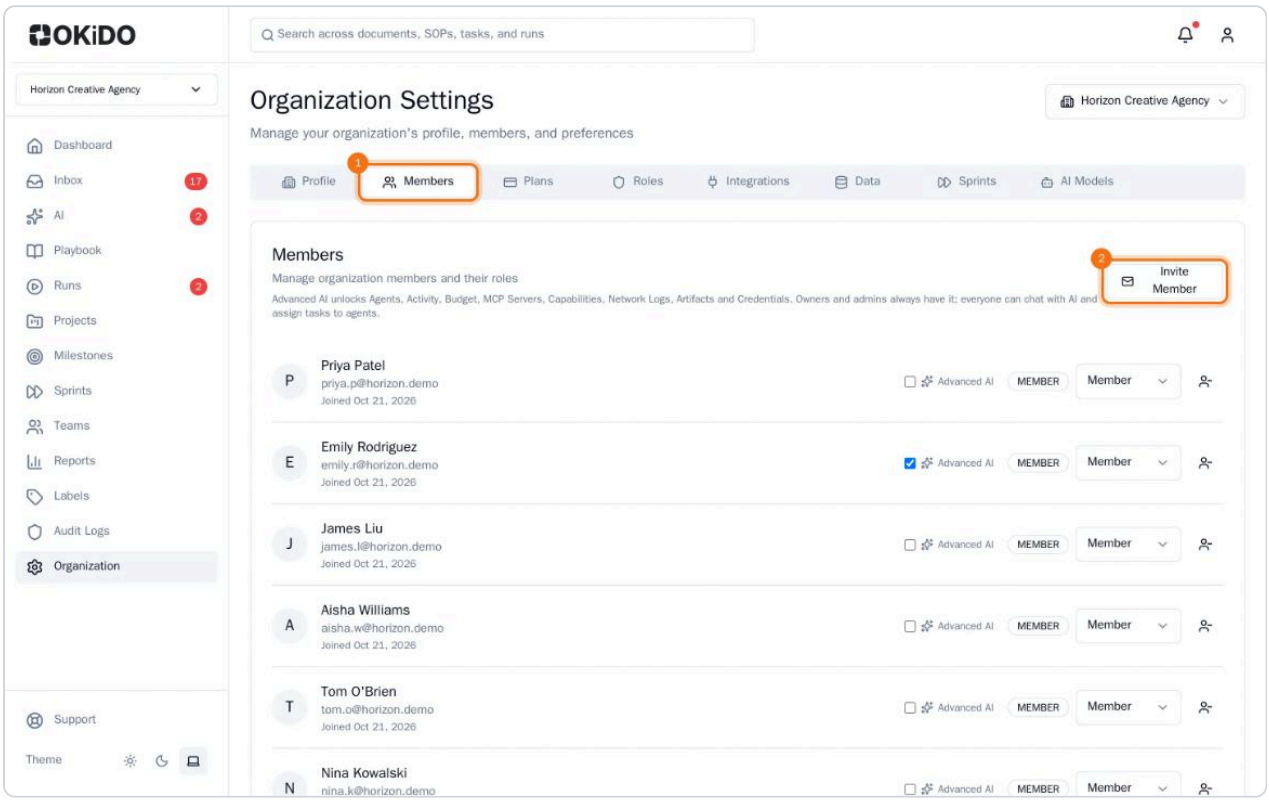
Available on: Starter · Pro · Business | Who can do this: Owner, Admin

Invite colleagues, freelancers or interns to your organization by email. You choose their role when you invite them, so they have the right access from their first sign-in.

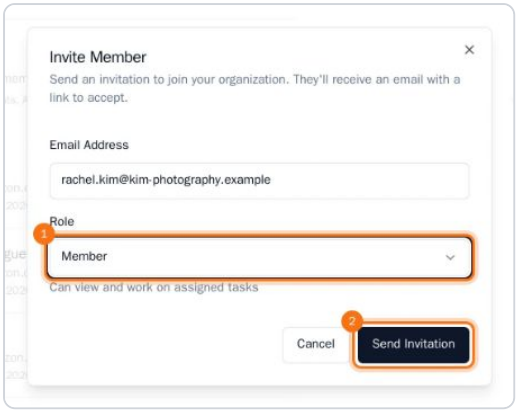
Only owners and admins can invite people. Only owners can invite someone as an owner.

Invite someone

1. In the menu on the left, choose **Organization**, then the **Members** tab.



2. Choose **Invite Member**.
3. Enter the **Email Address** and choose a **Role**. Below the role you see what someone with that role can do.

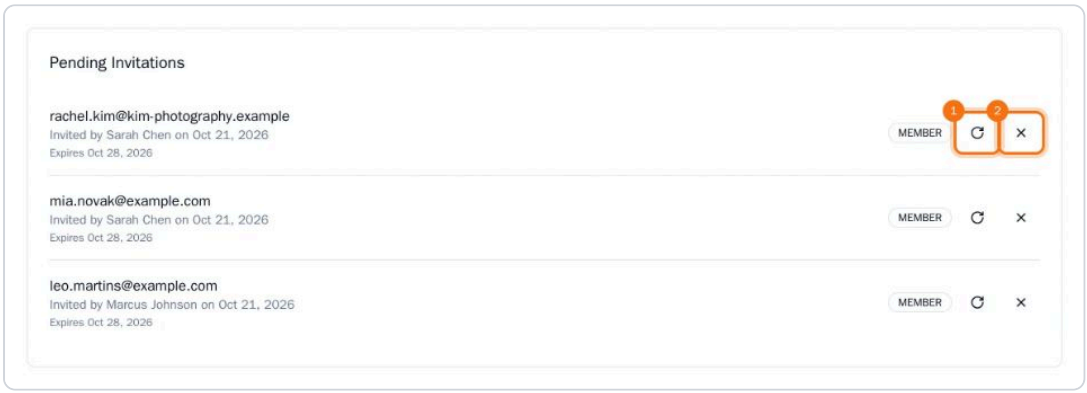


4. Choose **Send Invitation**.

The invitation is listed under **Pending Invitations**, with who sent it and when it expires. The person receives an email with a link to accept it.

Resend or revoke an invitation

Every open invitation has two buttons under **Pending Invitations**:



- **Resend invitation** (the circular arrow) sends the email again and gives the invitation a new expiry date. Use it when someone cannot find the email.
- **Revoke invitation** (the cross) cancels the invitation after you confirm with **Revoke**, and removes it from the list.

Change a member's role or Advanced AI access

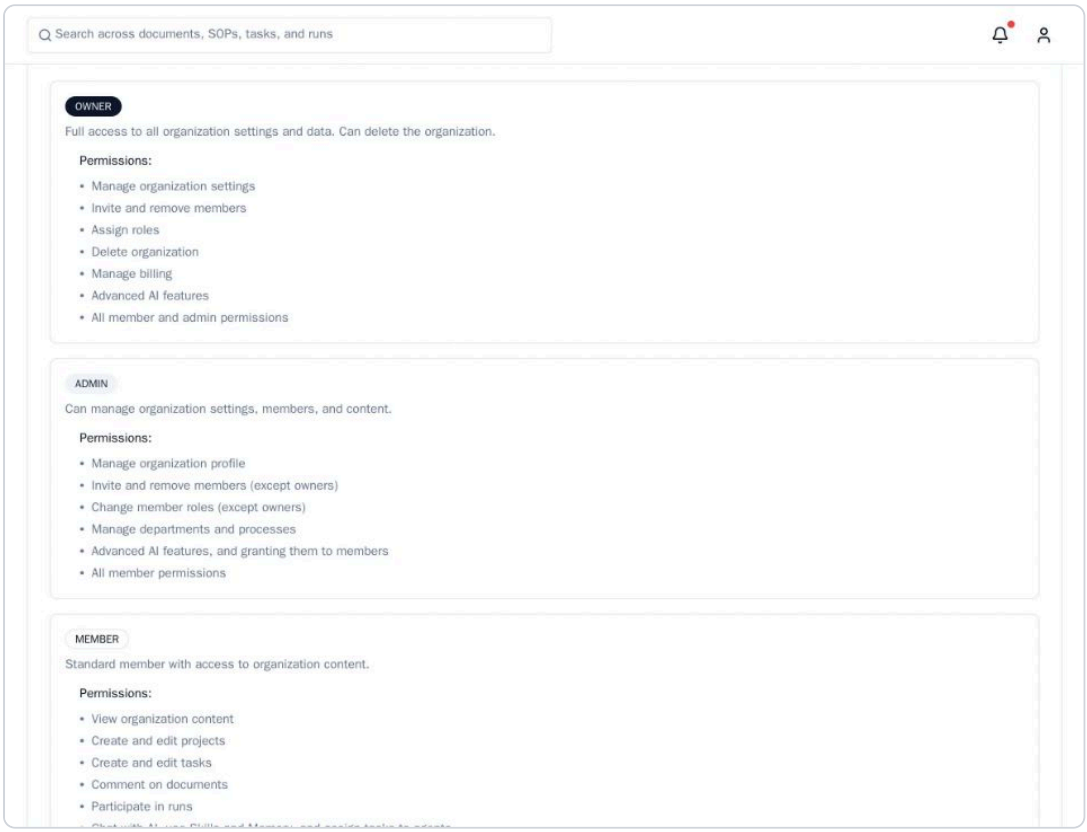
Make someone an owner, admin or member, turn Advanced AI on or off for members, and remove people from the organization.

Available on: Starter · Pro · Business | Who can do this: Owner, Admin

Everyone in your organization is an owner, an admin or a member, and the role decides what they can do. Members can also get the Advanced AI features, such as agents and their budget, that owners and admins always have.

See what each role can do

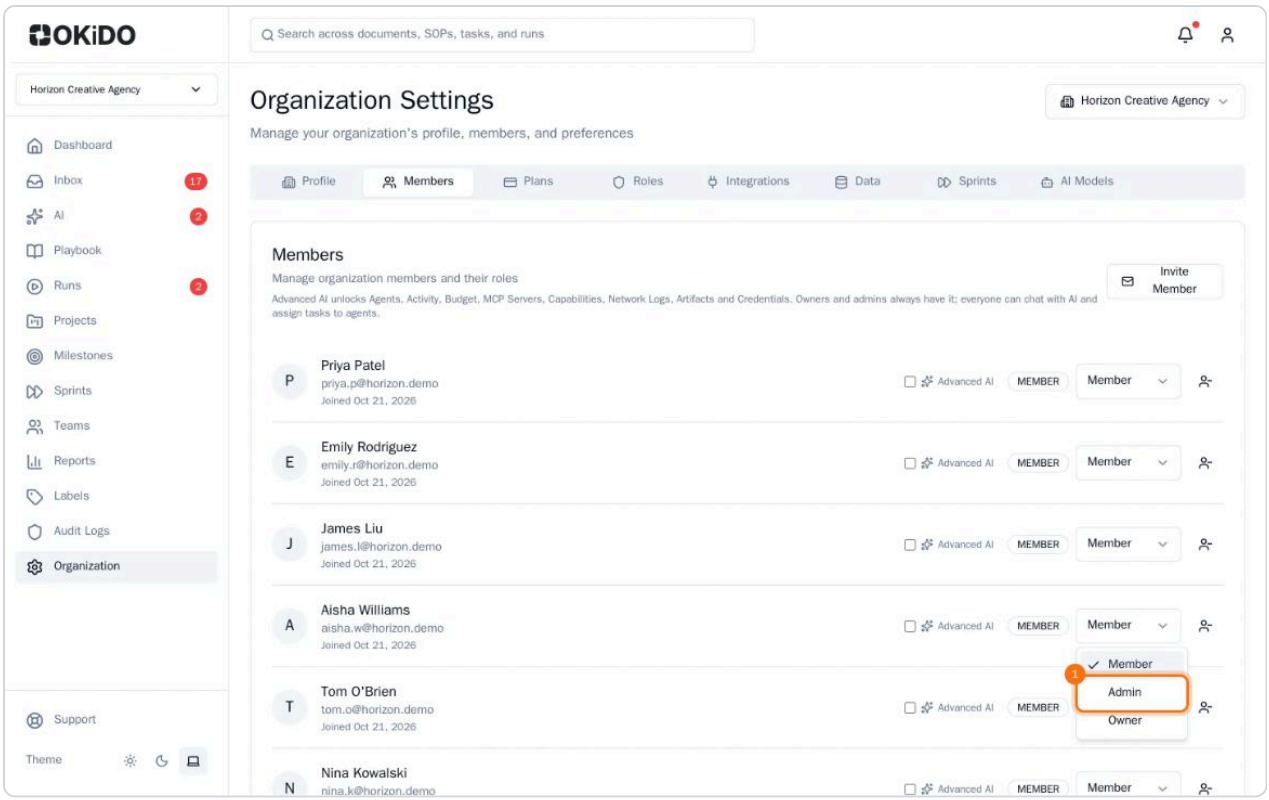
In the menu on the left, choose **Organization**, then the **Roles** tab. It lists the permissions of each role.



Change someone's role

Only owners can change roles.

1. Open **Organization** and choose the **Members** tab.
2. Next to the person, open the role list and choose **Member**, **Admin** or **Owner**.

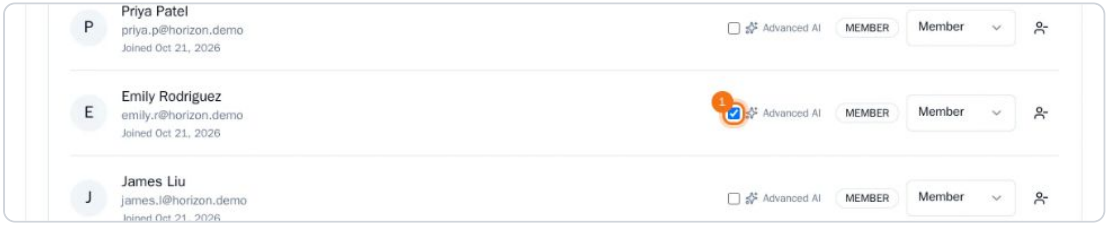


The new role applies right away and shows next to the person's name.

Turn Advanced AI on or off for a member

Owners and admins can give members the Advanced AI features. Owners and admins have them anyway: their row says **Advanced AI included**.

1. On the **Members** tab, tick **Advanced AI** next to the member.



The member gets the Advanced AI features right away. Untick the box to take them away again.

Remove someone from the organization

1. On the **Members** tab, choose the remove button (the person with a minus sign) next to the person.
2. Confirm with **Remove**.

The person no longer has access to the organization. Admins cannot remove owners, and nobody can remove themselves.

Change your plan and billing

See your organization's plan and usage, switch plans or to yearly billing, and cancel or check your billing history.

Available on: All plans | Who can do this: Owner, Admin

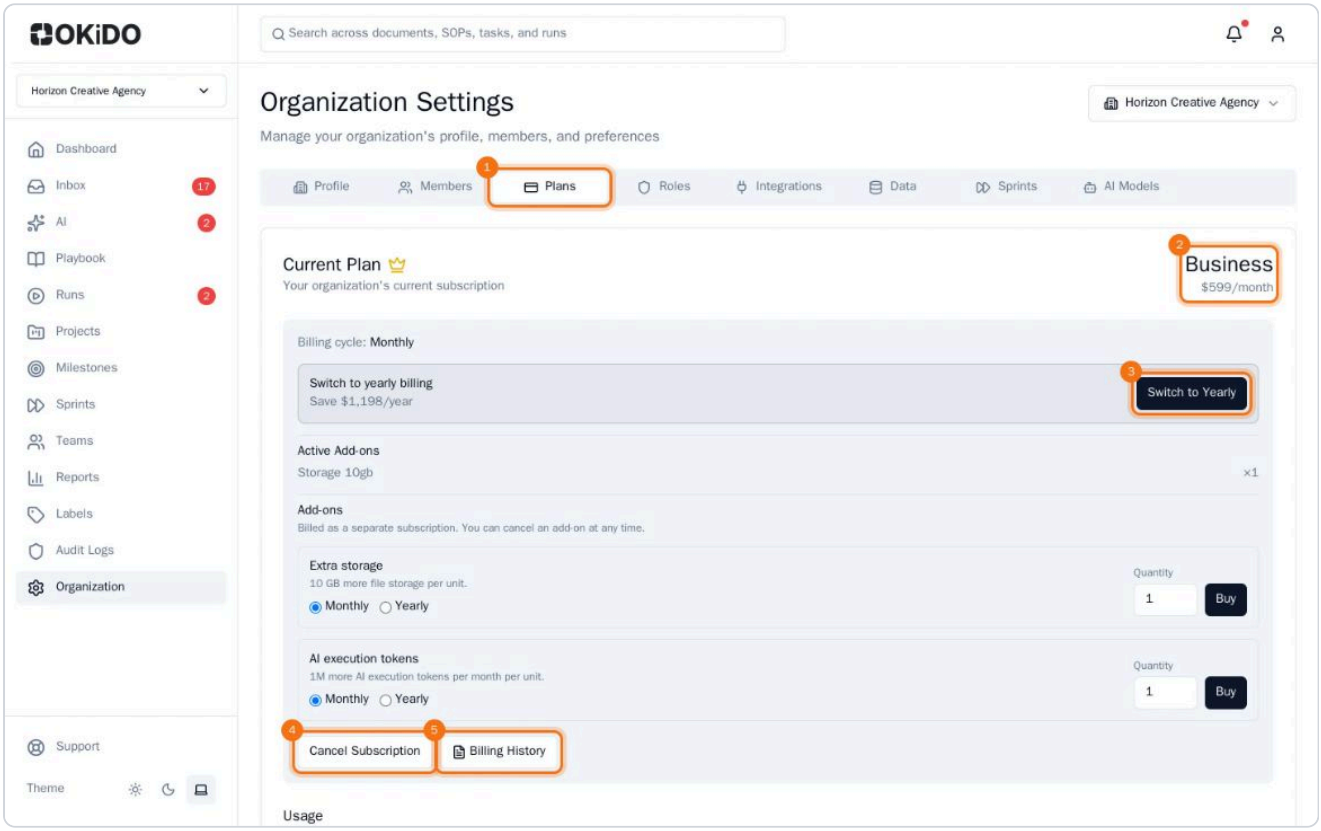
The **Plans** tab shows the plan your organization is on, how much of its limits you use, and what the other plans offer. From there you manage the subscription: move to another plan, switch to yearly billing, buy add-ons, cancel, and look up your invoices.

Only owners and admins can change the plan and the billing.

See your plan and usage

In the menu on the left, choose **Organization**, then the **Plans** tab.

Under **Current Plan** you see your plan, its price and your billing cycle, the add-ons you have, and the buttons to manage your subscription.



Under **Usage** you see, for each limit of your plan, how much your organization uses: SOPs, documents, runs, projects, tasks, members, teams and AI. A warning sign appears from 75 percent of a limit, and the bar turns red from 90 percent.



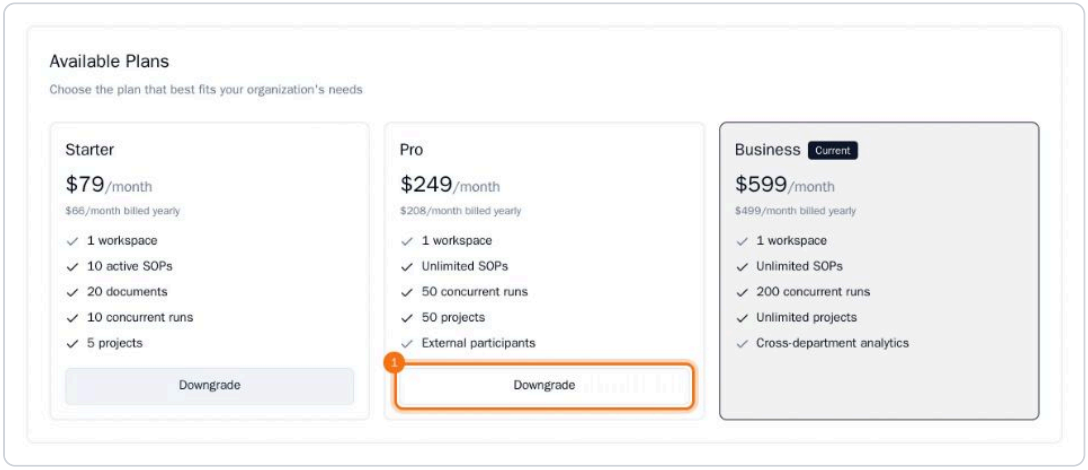
Need more file storage or AI tokens without a bigger plan? See Buy extra storage or AI tokens.

Switch to yearly billing

Paying monthly? Under **Current Plan**, **Switch to yearly billing** shows how much you save in a year. Choose **Switch to Yearly**. You keep your plan, and from then on it is billed once a year.

Switch to another plan

1. Under **Available Plans**, compare the plans: the price per month, the price per month with yearly billing, and what each plan includes.



2. Choose **Upgrade** or **Downgrade** on the plan you want.
3. Choose **Monthly** or **Yearly** billing. Yearly billing gives you two months for free. The summary below shows the total.
4. Choose **Confirm**, or **Confirm Downgrade** for a smaller plan.

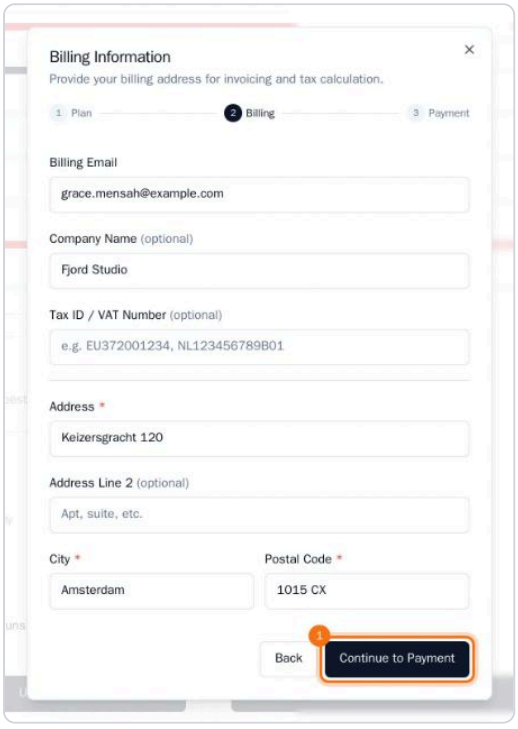
An upgrade takes effect right away, and you get a credit for the part of the current plan you have not used. A downgrade takes effect at the end of the current billing period, and you keep

everything your current plan includes until then. Until that day the tab shows the **Scheduled downgrade**; choose **Cancel Downgrade** to keep your plan after all.

Start a paid plan

Is your organization on the Free plan? Then choosing a plan starts a subscription, with a 14-day free trial.

1. Under **Available Plans**, choose **Upgrade** on the plan you want.
2. Choose **Monthly** or **Yearly** billing, then **Continue**.
3. Enter the **Billing Email** for your invoices and your company's address. The company name and VAT number are optional.



4. Choose **Continue to Payment**, enter your payment details and confirm the subscription.

Cancel or reactivate your subscription

Under **Current Plan**, choose **Cancel Subscription**. The subscription stops at the end of the current billing period: until then you keep your plan, and after that your organization moves to the Free plan. The tab shows until when you have access.

Changed your mind before that day? Choose **Reactivate** next to the notice, and the subscription goes on as before.

See your billing history

Under **Current Plan**, choose **Billing History**. You see your recent invoices with their date, amount and status, each with a link to its PDF or receipt.

Buy extra storage or AI tokens

Add extra file storage or more AI execution tokens to your plan, as an add-on with a subscription of its own.

Available on: Starter · Pro · Business | Who can do this: Owner, Admin

Running out of space for files, or using more AI than your plan includes? Buy an add-on instead of a bigger plan:

- **Extra storage**: 10 GB more file storage for each unit.
- **AI execution tokens**: one million more AI execution tokens a month for each unit.

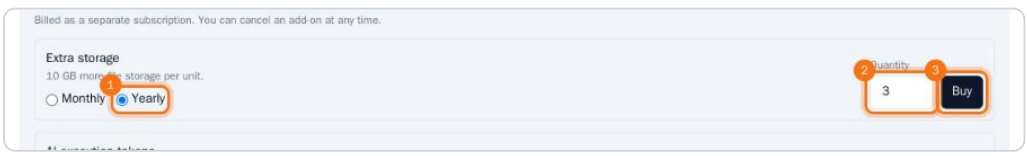
An add-on is billed as a subscription of its own, next to your plan. Only owners and admins can buy add-ons.

Buy an add-on

1. In the menu on the left, choose **Organization**, then the **Plans** tab.
2. Under **Current Plan**, find **Add-ons**. Your organization's add-ons so far are listed above it, under **Active Add-ons**.



3. At the add-on you want, choose **Monthly** or **Yearly** billing.
4. Enter the **Quantity**: how many units you need, from 1 to 100. The price for that quantity shows above **Buy**.



5. Choose **Buy**.

OKiDO takes you to secure checkout to pay for the add-on. When the payment is done, you are back on the **Plans** tab, and the add-on is listed under **Active Add-ons** with its quantity. From then on, its storage or tokens are added to your organization's limits.

Choose AI models

Pick the AI model your organization uses for chats, for agents at work and for agents started from an AI assistant.

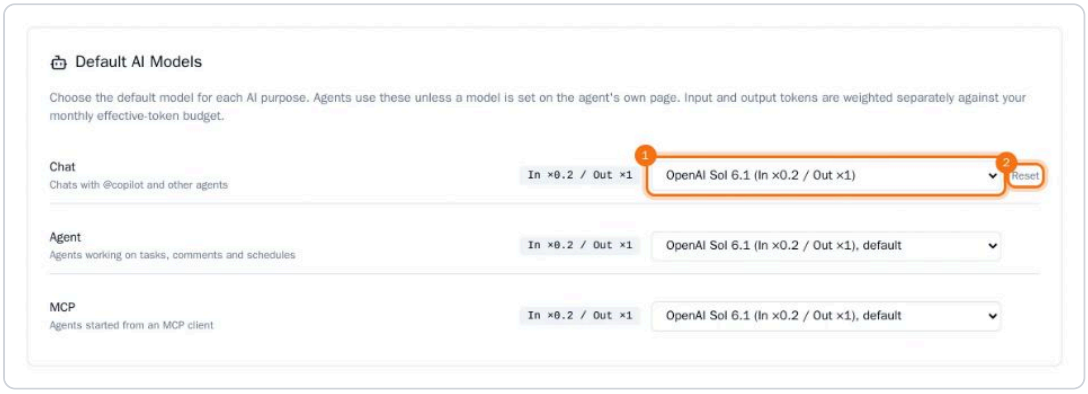
Available on: Starter · Pro · Business | Who can do this: Owner, Admin

OKiDO's AI uses a model for each purpose: chats, agents at work, and agents started from an MCP client. You can choose which model your organization uses for each one.

Only owners and admins can change these settings. Which models you can choose depends on your plan.

Choose the default models

1. In the menu on the left, choose **Organization**, then the **AI Models** tab.
2. Under **Default AI Models**, pick a model in the list next to a purpose.



The new model is saved right away. Agents use these defaults unless a model is set on the agent's own page.

Next to each model you see how its tokens count against your monthly token budget. For example, "In ×0.2 / Out ×1" means that a token the model reads counts for a fifth, and a token it writes counts in full. To go back to the model OKiDO recommends, choose **Reset**.

Set the sprint cadence

Choose how long your sprints are, the day they start and how long the sprint meetings take, and create the upcoming sprints.

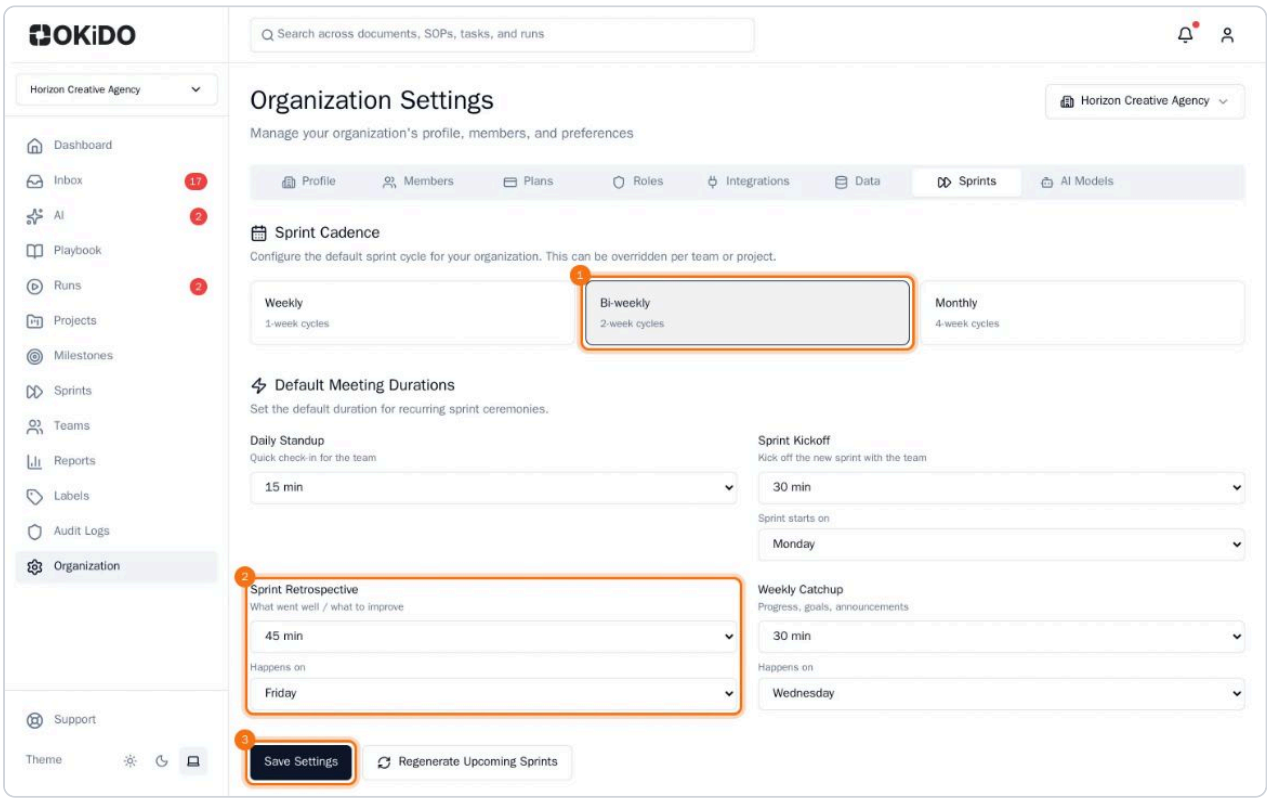
Available on: Pro · Business | Who can do this: Owner, Admin

Sprints split work into short periods with a fixed rhythm. Here you set that rhythm for your whole organization: how long a sprint lasts, the day it starts and how long its meetings take. OKiDO then creates the upcoming sprints for you.

Sprints are available on the Pro and Business plans. Only owners and admins can change these settings.

Choose the cadence and the meetings

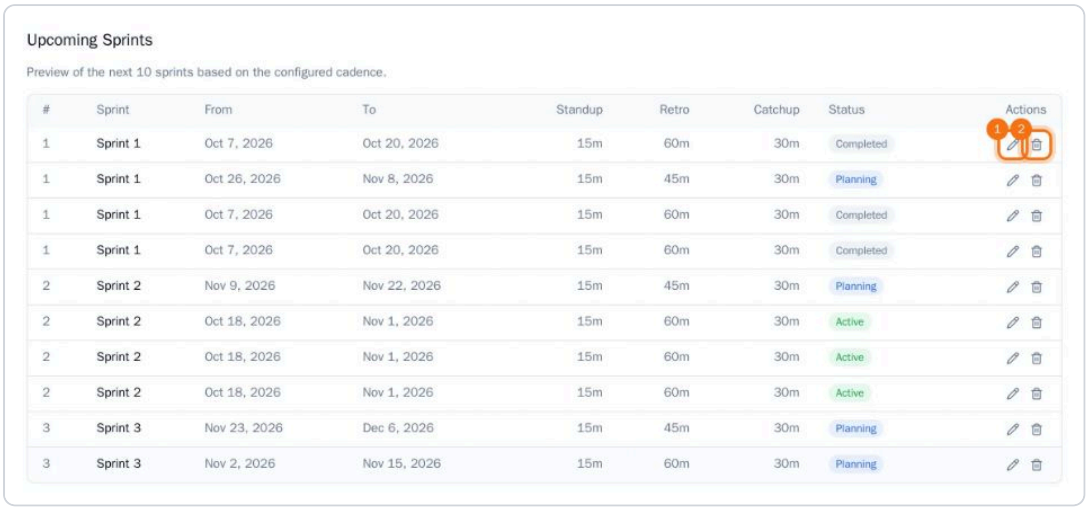
1. In the menu on the left, choose **Organization**, then the **Sprints** tab.
2. Under **Sprint Cadence**, choose **Weekly**, **Bi-weekly** or **Monthly**.
3. Under **Default Meeting Durations**, choose how long each meeting takes, or **None** for a meeting you don't hold.
4. Under **Sprint Kickoff**, choose the day under **Sprint starts on**. For the retrospective and the weekly catchup, choose the day under **Happens on**.



5. Choose **Save Settings**.

Create the upcoming sprints

Choose **Regenerate Upcoming Sprints**. OKiDO creates the next 10 sprints from your settings, starting on the next start day.



The table under **Upcoming Sprints** lists each sprint with its dates, meeting lengths and status. It also shows the sprints of projects that plan their own sprints. To rename a sprint or move its dates, choose **Edit sprint** (the pencil). To remove one, choose **Delete sprint** (the bin).

> **Tip:** After changing the cadence, choose **Regenerate Upcoming Sprints** again. Sprints that have not started yet are replaced by a new series.

Import data into your organization

Import projects, tasks and people from another tool or an OKiDO export, and check the preview before anything is created.

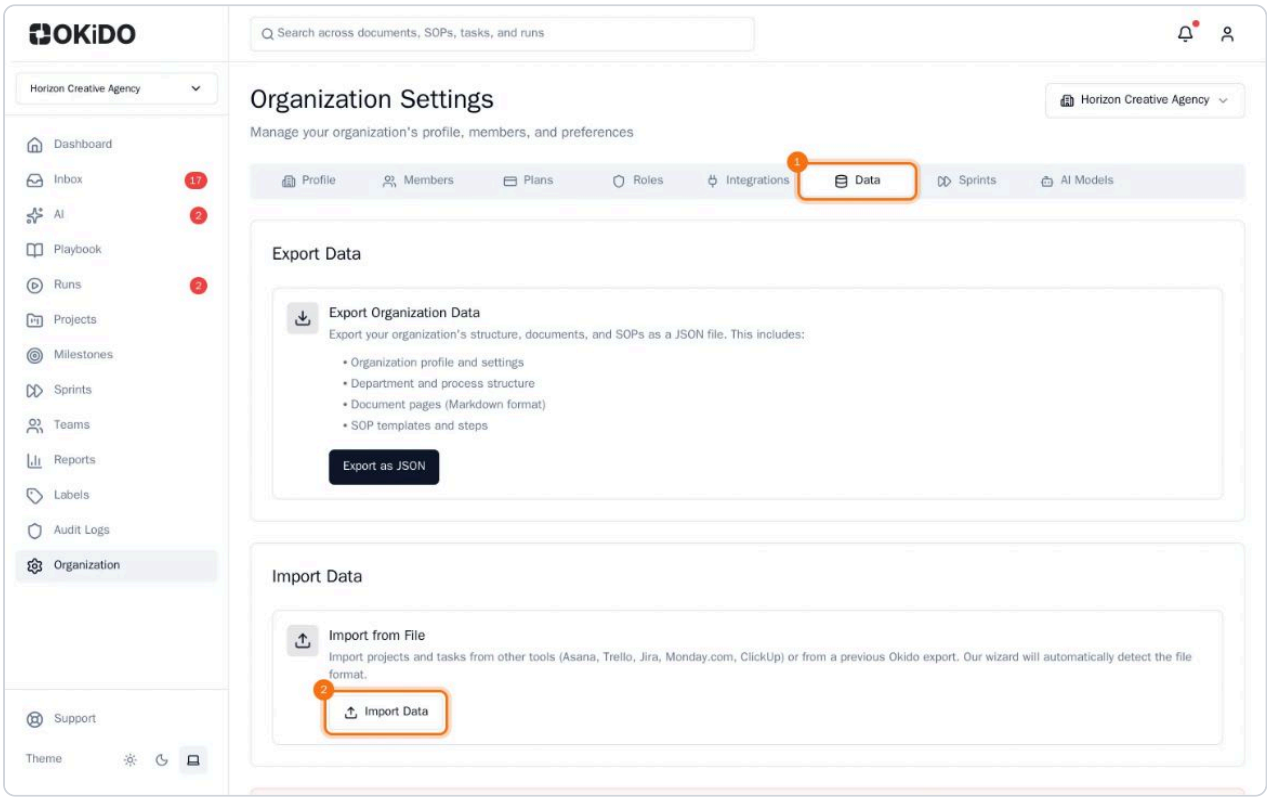
Available on: Starter · Pro · Business | Who can do this: Owner, Admin

Moving from Asana, Trello, Jira, Monday.com or ClickUp? Export your board or project there as a JSON file and import it into OKiDO. The import recognizes which tool the file comes from and shows you what it will create before it creates anything.

Only owners and admins can import into the organization. To import tasks into one project, see Import tasks from Asana, Trello, Jira, Monday or ClickUp.

Upload the file

1. In the menu on the left, choose **Organization**, then the **Data** tab.
2. Under **Import from File**, choose **Import Data**.

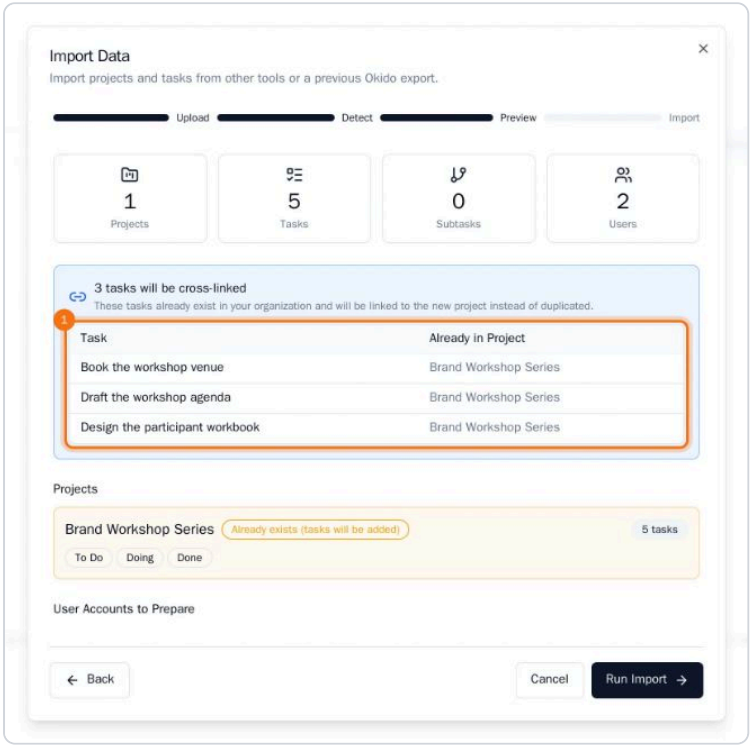


3. Drop your export file in the window, or click it to choose the file.
4. Choose **Detect Format**.
5. Check the tool the file was recognized as. If more than one tool is listed, select the right one.
6. Choose **Preview Import**.

Check the preview

Nothing has been created yet. The preview shows how many projects, tasks, subtasks and people the import holds, and for each project its number of tasks and its stages (the lists or columns of your old tool).

- A project with the same name as one in your organization is marked **Already exists (tasks will be added)**.
- Tasks you imported before are listed separately. OKiDO does not create them a second time.
- Under **User Accounts to Prepare** you see the people from the file. Someone with the same name as a member of your organization is linked to that member. For anyone else, OKiDO prepares an account that cannot sign in yet.



Run the import

Choose **Run Import**. When the import is done, you see what was created for each project and how many tasks were skipped because they already existed. Choose **Close**.

The imported projects are on your **Projects** page, with their tasks in the stages they had.

Review the audit log

See who signed in and what changed in your organization, and filter the events by action, type and date.

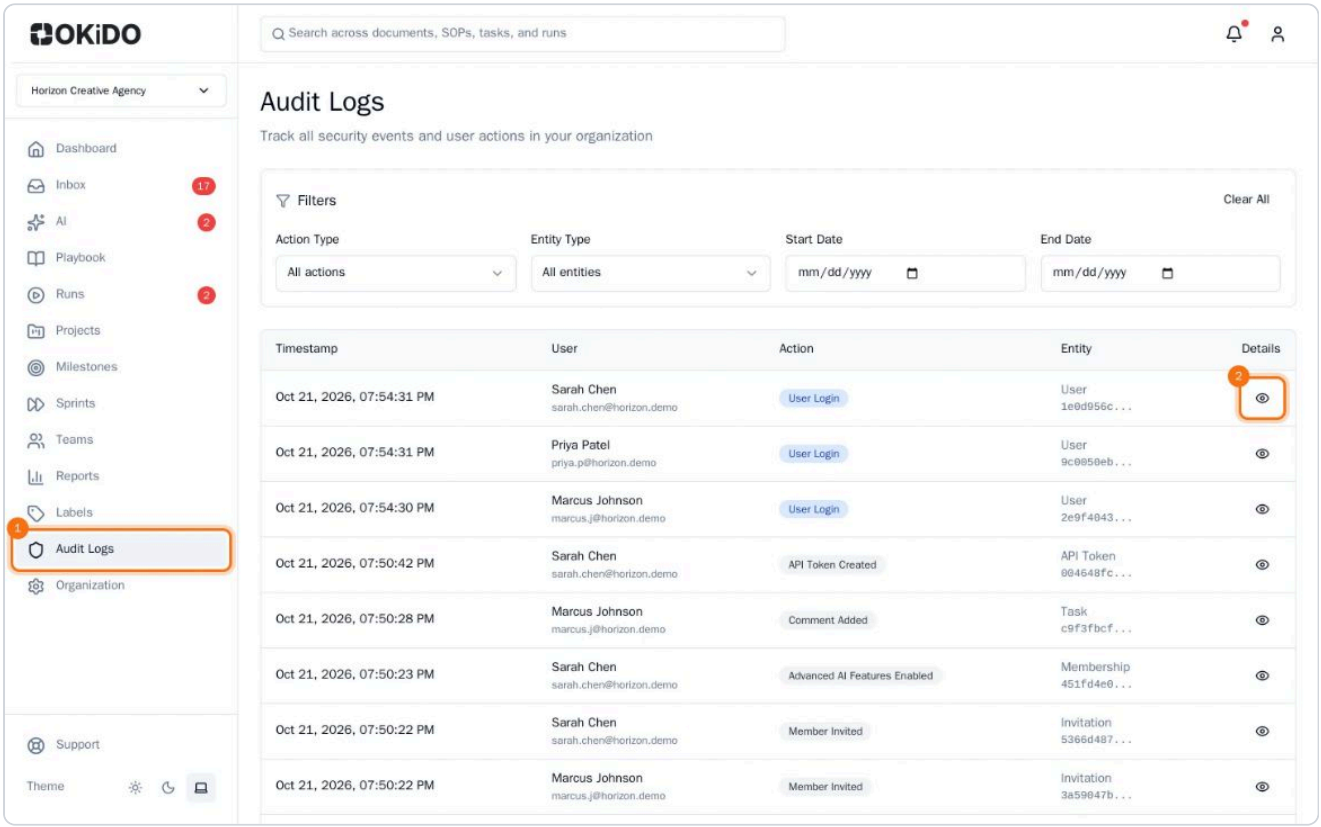
Available on: All plans | Who can do this: Owner, Admin

The audit log records the security events and changes in your organization: sign-ins, changes to the organization and its members and invitations, and changes to tasks. Use it to find out who did what, and when.

Only owners and admins can see the audit log.

Open the audit log

In the menu on the left, choose **Audit Logs**. The newest events come first, 20 per page. Each row shows when it happened, who did it, the action and what it applied to.



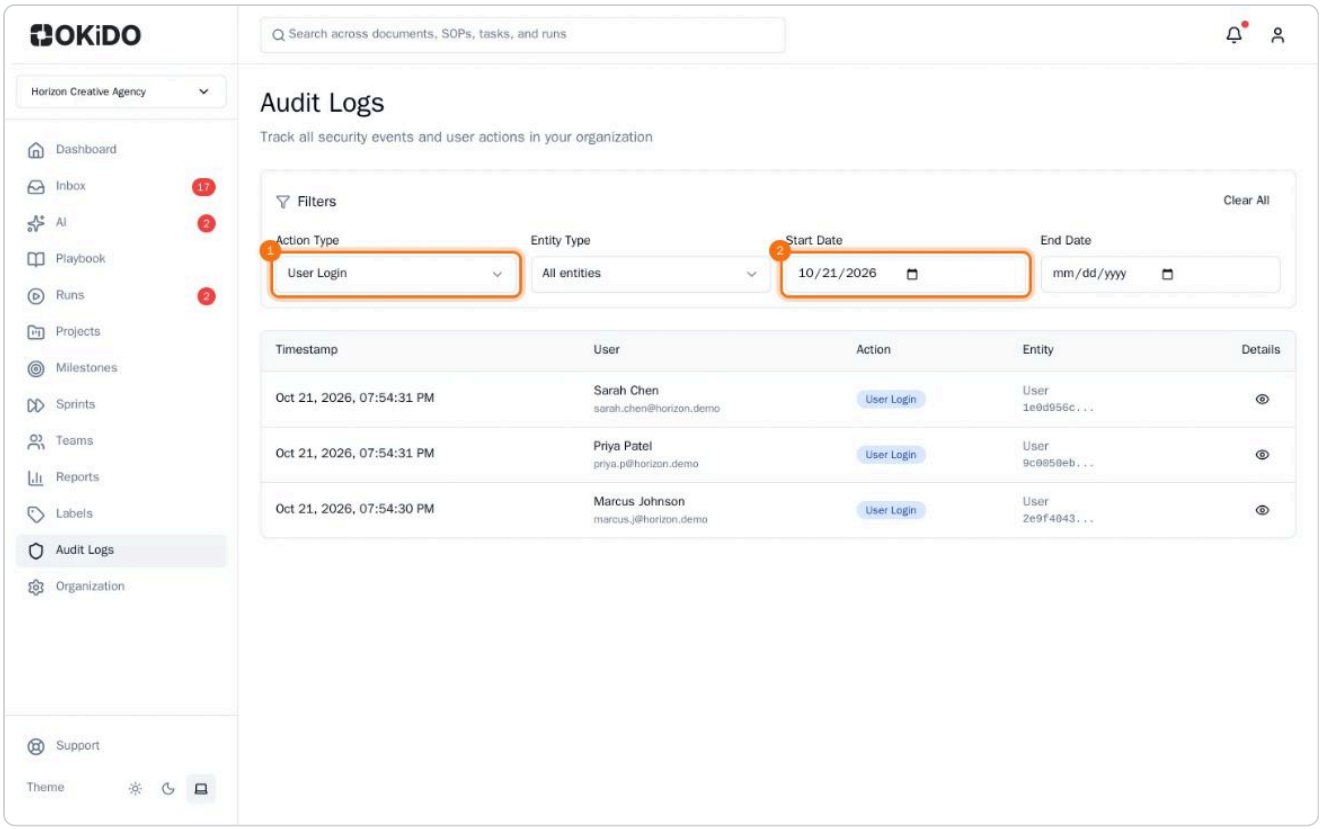
To see everything about one event, choose the eye at the end of its row.

Filter the events

Under **Filters**, narrow the list down:

- **Action Type**: one kind of event, such as **User Login** for sign-ins.
- **Entity Type**: what the event applied to, such as a user, a membership or a task.

- **Start Date** and **End Date**: only events between these days.



The list updates as soon as you change a filter. Choose **Clear All** to see all events again.

CHAPTER 14

Your account

Update your profile and working hours

Choose how you get notified

Change your password and sign out other devices

Refer someone to OKiDO

Read this chapter online

okido.io/en/docs/account

Scan the code or open the link to read this chapter online, where it is always up to date.

Update your profile and working hours

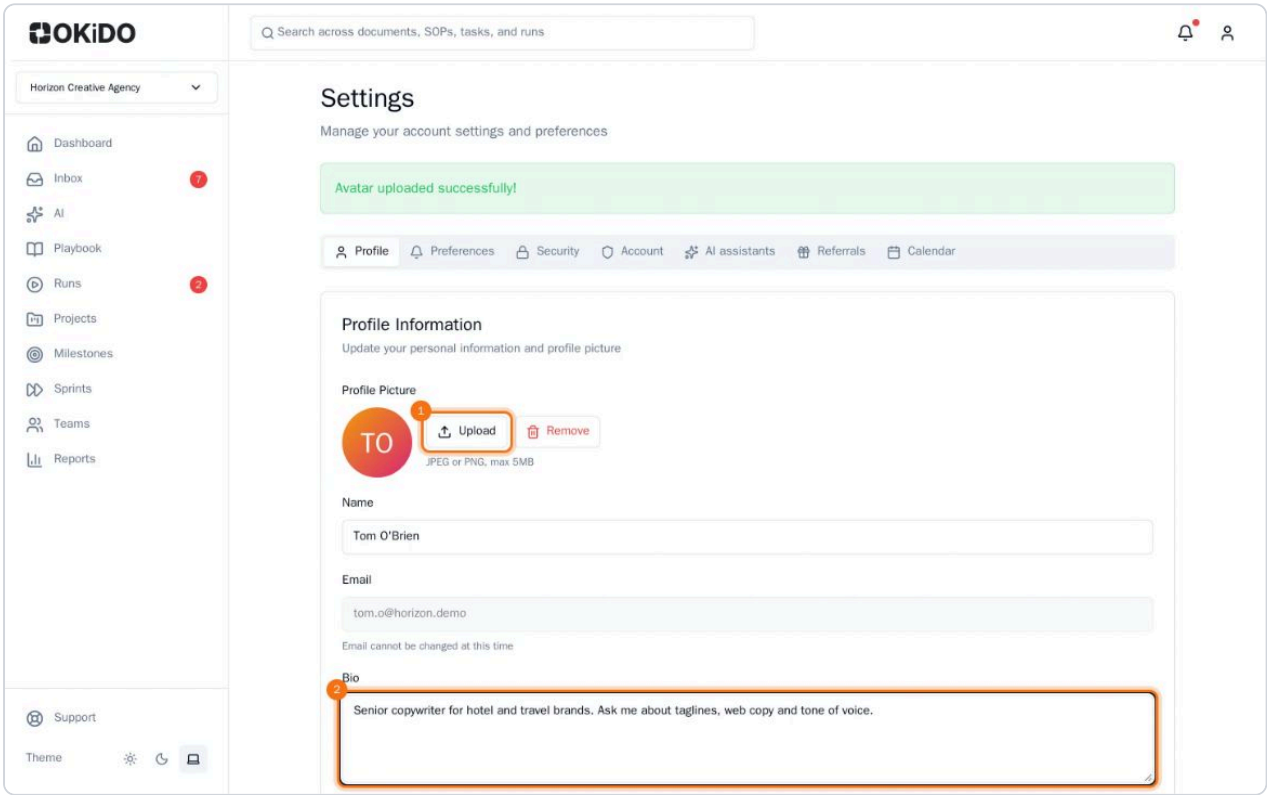
Change your name, picture and bio, and set your working days, hours and time zone so reminders reach you at the right time.

Available on: All plans | Who can do this: Everyone in the organization

Your profile is how your colleagues recognize you in OKiDO: your name and picture show up on the tasks assigned to you and in member lists. Your working hours tell OKiDO when to send you task reminders.

Change your name, picture and bio

1. Open the account menu (the person icon at the top right) and choose **Settings**. The **Profile** tab opens.
2. Under **Profile Picture**, choose **Upload** and pick a photo (JPEG or PNG, up to 5 MB). It is saved right away; **Remove** takes it off again.
3. Change your **Name**, and tell your colleagues about yourself under **Bio**.

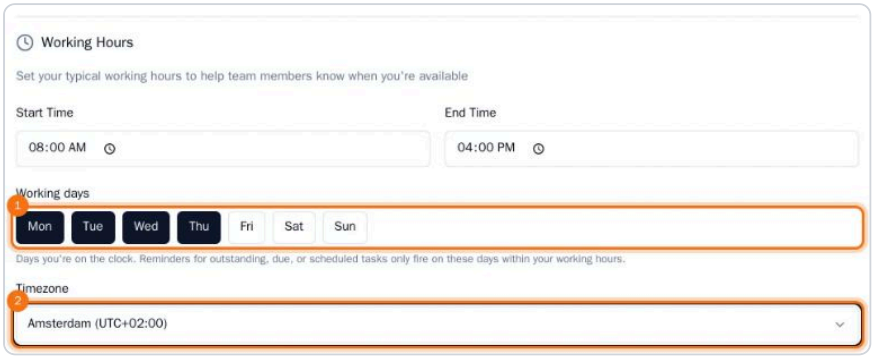


4. Choose **Save Changes** at the bottom of the tab.

OKiDO confirms that your profile was updated. Your email address is your sign-in name and cannot be changed here.

Set your working hours

1. On the **Profile** tab, under **Working Hours**, set your **Start Time** and **End Time**.
2. Under **Working days**, choose the days you work. Highlighted days are on; choose a day again to turn it off.
3. Choose your **Timezone**. Type part of a city or region to find it quickly.

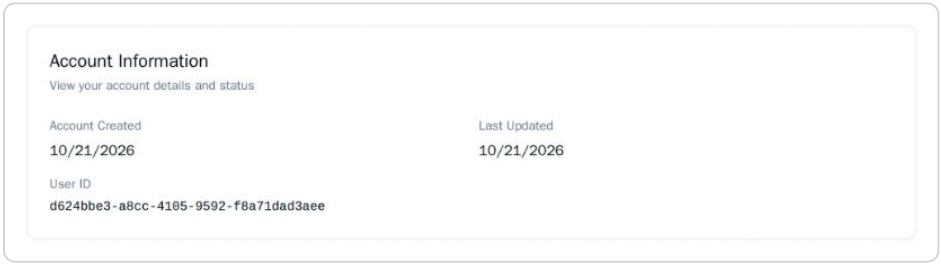


4. Choose **Save Changes**.

Task reminders now reach you only on your working days, between your start and end time, in your time zone. Choose which reminders you get in Choose how you get notified.

See your account details

The **Account** tab shows when you created your account, when it last changed, and your **User ID**. The support team may ask for that ID when they help you.



Choose how you get notified

Turn email, in-app and push notifications on or off, and choose whether OKiDO reminds you of open and due tasks.

Available on: All plans | Who can do this: Everyone in the organization

OKiDO lets you know when something needs you: a task assigned to you, a mention, an approval to give. You choose where those notifications reach you, and whether OKiDO also reminds you of tasks that are open or due.

Choose your notification channels

1. Open the account menu (the person icon at the top right) and choose **Settings**.
2. Choose the **Preferences** tab.
3. Under **Notification Channels**, check the channels you want and clear the others:
   - **Push notifications**: alerts from your browser on your computer or phone, even when OKiDO is closed (see Turn on push notifications).
   - **Email notifications**: emails to the address you sign in with.
   - **In-app notifications**: notifications in your **Inbox**.



4. Choose **Save Preferences** at the bottom of the tab.

New notifications now arrive only through the channels you checked. With **In-app notifications** cleared, new notifications no longer appear in your inbox at all, so keep at least one channel on.

Set your task reminders

1. On the **Preferences** tab, under **Task reminders**, check **Outstanding & due task reminders** to get reminders of your open and due tasks, or clear it to stop them.



2. Choose **Save Preferences**.

Reminders come through the channels you checked above, and only on your working days, within your working hours. Set those on your profile (see Update your profile and working hours).

Change your password and sign out other devices

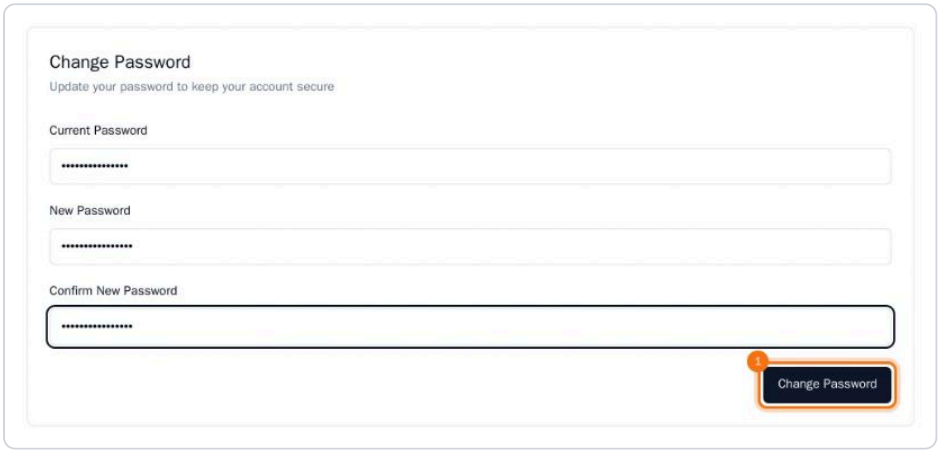
Change your password, or sign out every other device and connected AI assistant at once.

Available on: All plans | Who can do this: Everyone in the organization

Change your password from time to time, and right away if you think someone else knows it. Lost a phone or signed in on a shared computer? Sign out all your other devices in one go.

Change your password

1. Open the account menu (the person icon at the top right) and choose **Settings**.
2. Choose the **Security** tab.
3. Enter your **Current Password**, then your **New Password** (at least 8 characters) and enter it again under **Confirm New Password**.



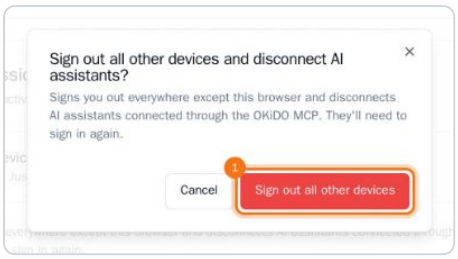
4. Choose **Change Password**.

OKiDO confirms the change, and you stay signed in on this device. To keep your account safe, the change also signs you out on every other device, disconnects your AI assistants and deletes your personal access tokens. Sign in there again with your new password, and reconnect your assistants.

> **Tip:** Forgot your current password? Sign out and use **Forgot password?** on the sign-in page (see Reset a forgotten password).

Sign out all other devices

1. On the **Security** tab, go to **Active Sessions**.
2. Choose **Sign out all other devices**.
3. Confirm with **Sign out all other devices**.



Every other browser, phone and app where you were signed in is signed out, AI assistants connected through the OKiDO MCP are disconnected, and your personal access tokens are deleted. You stay signed in on this device; everywhere else you sign in again with your current password.

Refer someone to OKiDO

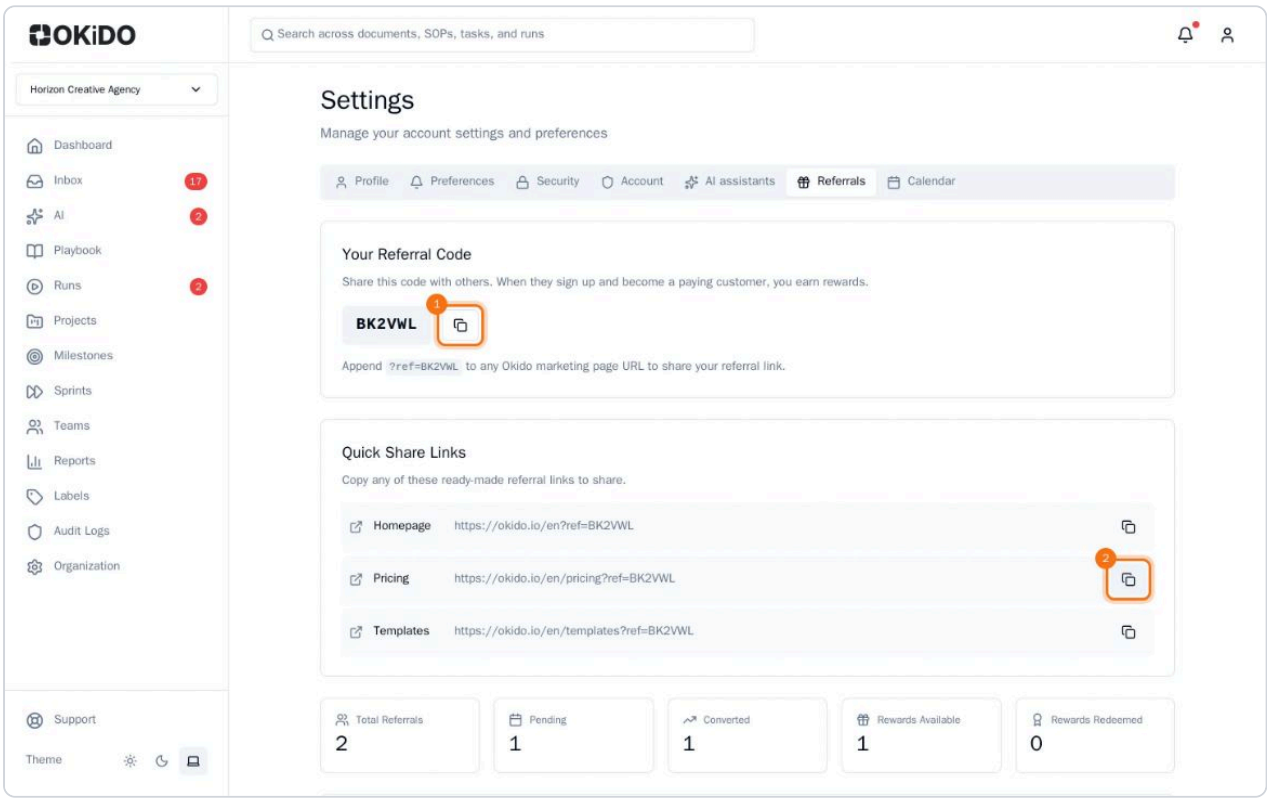
Share your referral code or ready-made links, and keep track of your referrals and rewards.

Available on: All plans | Who can do this: Everyone in the organization

Know a team that would like OKiDO? Share your personal referral link. When someone signs up through it and becomes a paying customer, you earn a reward: a $100 gift card, and after your first successful referral a one-hour strategy session with the OKiDO founding team.

Share your referral link

1. Open the account menu (the person icon at the top right) and choose **Referrals**. (It is also a tab in your settings.)
2. Under **Your Referral Code**, choose the copy button next to your code to copy it.
3. Or, under **Quick Share Links**, choose the copy button next to a ready-made link: the OKiDO homepage, the pricing page or the templates.

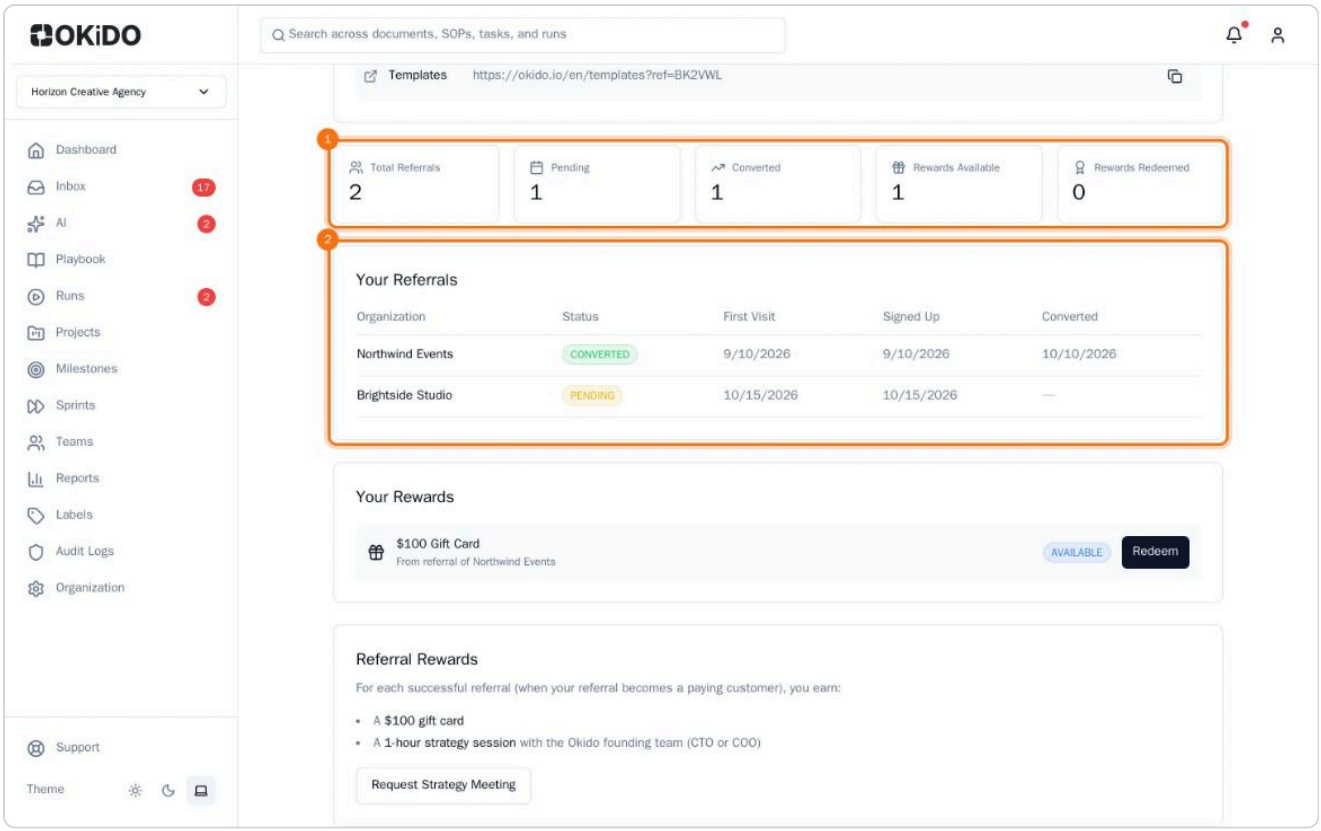


4. Paste the link into an email or message to the person you want to refer.

Anyone who opens your link and then signs up counts as your referral. You can also add `?ref=` and your code to the web address of any page on the OKiDO website.

Keep track of your referrals

Further down the **Referrals** tab you see how many people you referred, how many of them are still **Pending** and how many **Converted** (became paying customers), and the rewards you earned.



Each referral in **Your Referrals** shows the organization that signed up, its status, and when it first visited, signed up and converted.

Claim your rewards

1. Under **Your Rewards**, choose **Redeem** next to a gift card.
2. After your first successful referral, choose **Request Strategy Meeting** to plan your strategy session.

The OKiDO team follows up with you to send the gift card or schedule the session. Each request appears as a ticket under **Support**, so you can follow it there (see Get help from support).

APPENDIX

Appendix

Plans and what each includes

Glossary

Keyboard shortcuts

Frequently asked questions

Read this chapter online

okido.io/en/docs/appendix

Scan the code or open the link to read this chapter online, where it is always up to date.

Plans and what each includes

What the FREE, STARTER, PRO and BUSINESS plans include, and the limits OKiDO applies on each.

Available on: All plans | Who can do this: Everyone in the organization

Every organization is on one of four plans: FREE, STARTER, PRO or BUSINESS. The plan sets how much the organization can create and which features it can use. Organization owners and admins see the current plan, its usage and the other plans under **Organization** in the sidebar, on the **Plans** tab. To change plans, see Change your plan and billing.

Limits per plan

	FREE	STARTER	PRO	BUSINESS
Active members	1	Unlimited	Unlimited	Unlimited
Teams	None	Unlimited	Unlimited	Unlimited
Projects	None	5	50	Unlimited
SOP templates	5	10	Unlimited	Unlimited
Playbook documents	None	20	Unlimited	Unlimited
Runs at the same time	2	10	50	200
Completed runs kept	Unlimited	Unlimited	Unlimited	Unlimited
Playbook folders	Unlimited	Unlimited	Unlimited	Unlimited
File storage	10 GB	10 GB	10 GB	10 GB
AI tokens per month	None	1 million	10 million	25 million

"Runs at the same time" counts the runs that have not started yet, are in progress or are blocked. Finished runs do not count.

AI tokens are what AI chat, @copilot and AI agents use up. The monthly allowance starts again each month on the day your billing started, or on the 1st of the month.

Features per plan

	FREE	STARTER	PRO	BUSINESS
Public run links and public request forms		Yes	Yes	Yes
Recurring runs		Yes	Yes	Yes
Private, comment-only and template projects			Yes	Yes
Sprints			Yes	Yes
Organization API tokens and personal access tokens			Yes	Yes
AI agents that take actions, and capabilities built by @copilot			Yes	Yes
Choice of every AI model			Yes	Yes

On FREE and STARTER, a smaller set of AI models is available. Features that are not in these tables, such as Smart Labels, Playbook folders and the dashboard, work on every plan.

Add-ons

Paid plans can add extra storage in steps of 10 GB and extra AI tokens in packs of 1 million. Organization owners and admins buy them on the **Plans** tab. See Buy extra storage or AI tokens.

Trials and billing problems

A new subscription to a paid plan starts with a 14-day free trial, once per organization. During the trial, everything in the plan is available.

When a payment is pending, or the subscription is suspended or cancelled, the organization gets the limits of the FREE plan until billing is sorted out. Nothing is deleted: everything already created stays, but new items beyond the FREE limits cannot be added.

Glossary

The words OKiDO uses, from Playbook and SOP to run, system and Smart Label, each with a short explanation.

Available on: All plans | Who can do this: Everyone in the organization

The words you meet in OKiDO, in alphabetical order, each with a link to the article that covers it.

AI agent: An AI team member you can hand tasks to, within the permissions and budget you set. Agents report to @copilot and can be put to work on a project. See Create an AI agent.

Approval: A request to one or more people to approve a task. The task completes when everyone has approved. See Request an approval.

Board: The view of a project with a column for each stage of the work. See Switch between List, Board, Calendar and Gantt.

Capability: Something your agents can do, which @copilot builds and tests for you from a description in plain language. See Have @copilot build a capability.

Column rules: Fields that must be filled in before a task can be moved into a board column, and who may move tasks there. See Add rules to a column.

@copilot: Your organization's lead AI agent, set up for you automatically. Other agents report to it, and it builds capabilities. See Chat with AI.

Custom field: A field a label brings along, such as a client name or a budget, to fill in on every task with that label. See Add custom fields to a label.

Decision tree: A guided question flow in the Playbook that leads someone to the right answer or next step. See Build a decision tree.

Default labels: The labels every new task in a project starts with. See Give new tasks default labels.

Document: A wiki-style page in the Playbook, such as a guide or a policy, with versions and reviews. See Write a document.

Folder: A container in the Playbook that groups processes and other folders. See Organize the Playbook with folders and processes.

Inbox: Your list of notifications and requests: approvals, mentions, assignments and more. See Work through your inbox.

Milestone: A key point in a project with a target date, which tasks can belong to. OKiDO warns when the remaining work no longer fits. See Create a milestone.

Organization: Your company's workspace in OKiDO, with its own members, plan and data. You can belong to several. See Switch between organizations.

Owner, admin and member: The roles in an organization. Owners and admins manage the organization, its people, teams and labels; members do the work. See Change a member's role.

Playbook: Your organization's library of how work is done: folders, processes, documents, SOP templates, systems and decision trees. See Organize the Playbook with folders and processes.

Private project: A project only the people and teams you choose can see. See Control who can see a project.

Process: An entry in the Playbook for one way of working, such as client onboarding, that holds its SOPs and documents. See Organize the Playbook with folders and processes.

Project: A place for the tasks of one job, such as a client campaign or a website redesign, shown as a list, board, calendar or Gantt chart. See Create a project.

Request form: A form people fill in to ask a team for something. Each request becomes a task in a project. See Create a request form.

Run: A single time that an SOP is carried out, step by step, with its own people assigned to the steps and its own due date. See Start a run.

Smart Label: A label with a name, color and description that you put on tasks, documents and SOP templates. It can carry custom fields and belong to a category. See Create a Smart Label.

SOP: A standard operating procedure: a checklist of steps for a task you do again and again. You start a run from an SOP template. See Create an SOP template.

Sprint: A short, fixed period in which a team plans and finishes a set of tasks. See Plan a sprint.

Stage: A column on a project's board, such as a column for work in progress. See Set up board columns.

System: A flow in the Playbook that connects steps, SOPs and decisions with conditional logic, and runs them in order. See Build a system.

Team: A group of people in your organization, such as the creative team. Assign tasks to a team and give it access in one go. See Create a team.

Template project: A reusable project whose tasks have due dates relative to a start or launch date. See Reuse a project as a template.

Keyboard shortcuts

Every keyboard shortcut OKiDO supports, from searching with Ctrl+K to formatting text and sending messages.

Available on: All plans | Who can do this: Everyone in the organization

On a Mac, press Cmd where this page says Ctrl, and Option where it says Alt.

Everywhere

Keys	Where	What it does
Ctrl+K	Any page with the sidebar	Opens search. Press it again to close search.
↑ and ↓	Search	Move through the results.
Enter	Search	Opens the highlighted result.
Esc	Search, dialogs and menus	Closes them.
Esc	An open task	Closes the task.

See Find anything with Ctrl+K.

Tasks and projects

Keys	Where	What it does
Enter	A task's title, after clicking it	Saves the new title.
Enter	The field for a new subtask	Adds the subtask.
↑, ↓ and Enter	A list you can search, such as the assignee	Move through the choices and pick one.
Enter	The name of a new project	Creates a public or template project.

Writing text

These work in every text box with formatting: task descriptions, comments, documents, SOP steps and sprint meeting notes.

Keys	What it does
Ctrl+B	Bold
Ctrl+I	Italic
Ctrl+Shift+S	Strikethrough
Ctrl+E	Code
Ctrl+Alt+1, 2 or 3	Heading of level 1, 2 or 3
Ctrl+Alt+0	Normal text
Ctrl+Shift+8	Bulleted list
Ctrl+Shift+7	Numbered list
Ctrl+Shift+9	Checklist
Ctrl+Shift+B	Quote
Ctrl+Alt+C	Code block
Shift+Enter	New line within the same paragraph
Tab and Shift+Tab	Indent or outdent a list item; in a table, go to the next or previous cell
Ctrl+Z	Undo
Ctrl+Y or Ctrl+Shift+Z	Redo

You can also type these at the start of a line: `#`, `##` or `###` and a space for a heading, `-` and a space for a bulleted list, `1.` and a space for a numbered list, `[ ]` and a space for a checklist item, `>` and a space for a quote, and three backticks for a code block. Type `---` for a dividing line. Surround words with `**` for bold or `*` for italic.

Type	What happens
`@`	Pick a person or an AI agent to mention.
`#`	Pick a task, run, document or process to link to.

Type	What happens
`{{`	Pick a variable to insert (in SOP steps).

In these lists, ↑ and ↓ move, Enter picks and Esc closes the list.

AI chat and support

Keys	Where	What it does
Enter	The message box in **AI**	Sends the message.
Shift+Enter	The message box in **AI**	Starts a new line.
`@` or `#`	The message box in **AI**	Suggests an agent, or a project or task, to mention. ↑ and ↓ move, Enter or Tab picks, Esc closes.
Ctrl+Enter	A reply to a ticket in **Support**	Sends the reply.

Playbook builders

Keys	Where	What it does
Delete	A system or decision tree you are editing	Deletes the selected step or connection. The start step cannot be deleted.
Shift+drag	A system or decision tree you are editing	Selects several steps at once.
Arrow keys	A system or decision tree you are editing	Move the selected step. Hold Shift to move it further.

Organizations

Keys	Where	What it does
Enter	The organization menu at the top of the sidebar	Shows only the highlighted organization.

Keys	Where	What it does
Space	The organization menu at the top of the sidebar	Adds the highlighted organization to, or removes it from, what you see, and keeps the menu open.

See Switch between organizations.

Frequently asked questions

Short answers to the questions new OKiDO users ask most, each with a link to the full article.

Available on: All plans | Who can do this: Everyone in the organization

Why don't I see Labels or Organization in the sidebar?

Only organization owners and admins have **Labels**, **Audit Logs** and **Organization** in the sidebar. Members can use labels on their tasks, but not change them. See Create a Smart Label.

Why can't I choose a private project?

Private, comment-only and template projects are part of the PRO and BUSINESS plans. Choosing who gets access to a new private or comment-only project also takes an organization owner or admin. See Create a project.

A colleague can't open my project. What do I do?

The project is probably private. An organization owner or admin can add your colleague, or their team, under **Members**, or you can make the project public if you created it. See Control who can see a project.

Where did the done tasks on my board go?

A project shows **All pending tasks** at first, which hides done tasks. Choose **All tasks** to see them. See Filter, sort and group tasks.

Why won't a task move into a column?

The column has rules: a field must be filled in first, or only certain people may move tasks into it. The message on screen says which. See Add rules to a column.

Can I get an archived project back?

Not from the app yet: OKiDO has no list of archived projects. Archive only projects that are finished. A deleted project cannot be brought back at all. See Archive or delete a project.

Can I bring my tasks over from Trello, Asana, Jira, Monday.com or ClickUp?

Yes. Export your board or project as a JSON file and import it into a project with the import wizard. Organization owners and admins can import. See Import tasks from Asana, Trello, Jira, Monday or ClickUp.

How do I give every task in a project the same labels?

Make them the project's default labels. Every new task in the project then starts with them. See Give new tasks default labels.

How do I start the same kind of project again and again?

Build it once as a template project, with due dates relative to the start or launch date, and start each new project from it with **Clone**. See Reuse a project as a template.

How do I change someone's role in a team?

Remove the person from the team and add them again with the new role. See Add people to a team.

What happens if a payment for our plan fails?

Until billing is sorted out, the organization gets the limits of the FREE plan. Nothing is deleted, but you cannot add new items beyond those limits. See Plans and what each includes.

Is there a quick way to find something?

Press Ctrl+K (Cmd+K on a Mac) on any page to search across documents, SOPs, tasks and runs. See Keyboard shortcuts.