# Monday.com User Guide

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# Chapter 1. Introduction

Monday.com is a team management web and mobile application. Monday aims to enhance collaboration by managing tasks and by tracking projects and deadlines. Monday is made to accomodate a wide range of business operations, including R&D, marketing, sales, product and customer-management.

Monday allows users to connect with other apps. Connecting with other apps can notify communication channels when changes have been made to a task. Monday allows you to connect with Gmail, iCalander, Slack, Drive, Dropbox, MailChimp, Jira and many others. Integrations are a great way to make sure everyone is on the same page and up to date with tasks and projects.

Monday allows users to create automations. Automations within Monday allow tasks that would normally have to be performed by you, to be performed by Monday.com automatically within the program. Using atuomations is a very common task that you will find beneficial and it cuts out a lot of unnecessary work for you. For example, automations can allow an update to occur based on a status update or they can assign a person as the creator of an item when it is created. This prevents a lot of back-work that team leaders and project managers would otherwise have to perform.

Visit monday.com below in the related information secction.

Also provided is a glossary of terms you may need to operate Monday.com

**Related reference**

- Monday.com Glossary *(on page )*

**Related information**

- [http://www.monday.com](http://www.monday.com)

# Chapter 2. Getting Started

This section provides help articles to aid you in getting set up to use monday.com. In these articles, you will learn:

- How to create an account
- How to log in to monday.com
- How to reset your password if you forget it.
- How to invite your team members to monday.com
- How to get help with monday.com if you encounter any difficulties

**Related tasks**

- Forgot Your Password? *(on page 2)*
- Inviting New Users *(on page 3)*

**Related information**

- *(on page )*
- *(on page )*

# Forgot Your Password?

In the event that you have forgotten your password, you can easily reset it if you have access to the account email. To reset your password:

1. Go to “Log In” screen
2. Click on “Forgot your password?’ below the account information text boxes
3. Enter your account email into the text box
4. Click the reset password button
5. An email will be sent to your account email with a link to reset your password
   Figure 1. Resetting Your Password

After the email is received, follow the instructions in the email. You will choose a new password, and then be able to log back into your account with the new password.
For more information contact customer support https://monday.com/help

**Related information**

- Getting Started *(on page 2)*

# Inviting New Users

Monday.com is built for collaboration between users to share work and view projects. When a new board is created users can quickly add others if necessary. Whoever has access to edit the board can add users, and can either add current users or new users. By sending a link to a user, they will be taken to monday.com, where they will be either prompted to login or to sign up. After signing in, users will have access to the board from their home screen. Users can also add other users directly by their email, and they will have access to the board from there.

1. From the Board Page, click the add user icon on the side navigation bar.
2. Select invite with link or add the users email manually.
3. Users will be able to click the link and gain access to the board after signing in.

**Related information**

- Getting Started *(on page 2)*

# Chapter 3. Inbox

The Inbox is a critical feature of Monday.com. You may wish to communicate with your team about projects, get updates on tasks, or request help. This section provides help articles to aid you with the Inbox feaure in monday.com. Here you can see updates and project notifications, as well as messages from project partners. In these articles, you will learn how to:

- Access Your Inbox
- Dismiss Items From Your Inbox

**Related tasks**

- Accessing Your Inbox *(on page 5)*
- Dismissing Updates From Your Inbox *(on page 5)*

## Accessing Your Inbox

This section will detail how to access the inbox, a main feature of Monday.com. Here users can see notifications, updates, and messages from coworkers. They can quickly view the information without having to go into individual projects.

1. The Inbox is automatically shown on the homepage of Monday.com
2. If not located, click on the Monday logo in the top left to bring you back home, the inbox will now be available.

**Related information**

- Inbox *(on page 5)*

## Dismissing Updates From Your Inbox

Maintaining an organized inbox will increase productivity and make sure you are up to date on information with your team. After a message has been read, it can be dismissed from view if it is no longer required.

1. To dismiss updates, select the blue circular button with the white check mark inside of it that floats to the right of your updates.

2. The update will now be dismissed and will no longer be seen unless the “All Updates” option is chosen.
   Figure 2. Dissmissing updates from inbox

## Related information

- Inbox *(on page 5)*

# Chapter 4. My Week

My week allows users to see what due dates and deadlines are coming up in the current week. They can also travel to future weeks, or previous weeks if necessary to look over past projects. This is useful to keep track of all projects that are due, and make sure that they are completed on time, or review past work.

Owners of the Boards will be able to edit the deadlines if needed. Other users can hide boards if they don't want to see it at the given time, but can easily reverse the decision if necessary.

**Related tasks**


- Accessing the My Week Page *(on page 7)*
- Changing the Week *(on page 7)*
- Viewing Deadlines *(on page 8)*
- Editing Deadlines *(on page 9)*
- Hiding Deadlines *(on page 9)*
- Unhiding Deadlines *(on page 10)*


## Accessing the My Week Page

If you need to access the “my week” page, click on the “My Week” tab in the bottom left corner of the dashboard navigation section. This will open the "My Week" page, and show all available projects under the selected date.

**Related information**


- My Week *(on page 7)*


## Changing the Week

If you want to look ahead at future tasks, or need to look in the past to previous tasks, you can. To view other other weeks:

1. select the “previous week” or “next week” text links at the top middle of the page.

2. The week will switch to either the previous or next week, and show deadlines relative to those dates.
   Figure 3. Changing the Week

**Related information**

- My Week *(on page 7)*

# Viewing Deadlines

Viewing deadlines can be used to either remember when tasks are due, but also change deadlines if applicable.

1. Each category can be expanded by clicking on the category itself
2. After expanding a category, you can select a deadline by clicking on it.
3. This will open the Deadline box which allows you to edit the deadline.
   Figure 4. Viewing Dealine

**Related information**

- My Week *(on page 7)*

# Editing Deadlines

If deadlines need to be extended or moved up, this is where you would change them. With the Deadline box open, you can:

1. View the title of the group that the deadline relates to
2. View the people that are related to the deadline, or add people to the deadline
3. View/Change project status
4. View/Change Deadline date
   Figure 5. Editing Task Deadlines

**Related information**

- My Week *(on page 7)*

# Hiding Deadlines

Deadlines may need to be hidden if they are cluttering your My Week page, or are currently not a top priority. Hiding them is simple, and can be quickly reversed if necessary. To hide a deadline:

1. Select the “Hide” text link to the right of the deadline
2. The Deadline will now be hidden and will not be visible on your “My Week” page

**Related information**

- My Week *(on page 7)*

# Unhiding Deadlines

If deadlines are hidden from view, and you need to see them, the following steps will show you how to make them reappear. To unhide a deadline:

1. Select the settings icon in the top right corner of the page
2. A menu will slide in from the right side of the screen
3. Find the hidden board that you wish to unhide under the “hidden boards” section
4. Click on the “+” icon to the right of the hidden board title for it to reappear on your “My Week” page

**Related information**

- My Week *(on page 7)*

# Chapter 5. Boards

Boards are the main function of Monday.com. Boards are where users come together to view tasks, project statuses, see deadlines, and see the overall project.

Depending on the clearance level of the user, changes within the board can be made, such as deadlines, otherwise they can only be viewed unless given permission. Admins can add or remove users if necessary, and add columns to the board.

The following video will assist in Board creation and editing the contents:

**Related tasks**


- Creating a Board *(on page 11)*
- Creating a Blank Board *(on page 12)*
- Editing Group Title *(on page 13)*
- Editing Board Title *(on page 14)*
- Adding People to a Board *(on page 15)*
- Editing Board Status *(on page 15)*
- Adding a Column to a Board *(on page )*
- Viewing Archived Items *(on page )*

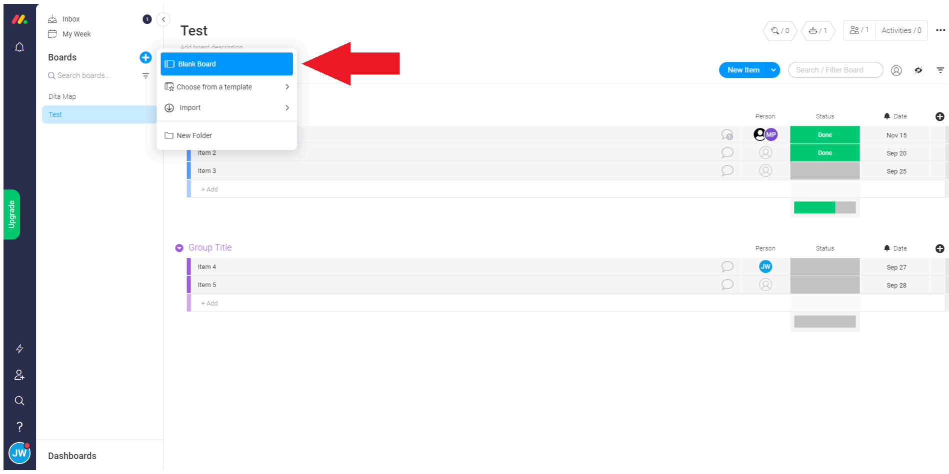

# Creating a Board

This task allows you to create an empty board on monday.com. This is an essential task in using the website and you have to do this to use most features of the site. This task will have you create, name, and set the visibility opf a board.

Boards on monday.com are used to contain different projects. You can allow different people access to different boards so that only people who are on a project have access to the board. You want to give a name to the blank board because the name will help distinguish it from other boards. You want to make the board visible if you are ready to reveal the project and you want to make the board invisible if you don't want others to have access to it yet.

1. From the homepage click on the blue "+" button on the upper left side of the screen.

2. You may choose any of the following options: "Blank Board," "Choose From Template," "Import," "New Folder"
   Figure 6. Creating a Black Board




3. A new board will be created based on the option that you selected.

# Creating a Blank Board

This task allows you to create an empty board on monday.com. This is an essential task in using the website and you have to do this to use most features of the site. This task will have you create, name, and set the visibility opf a board.

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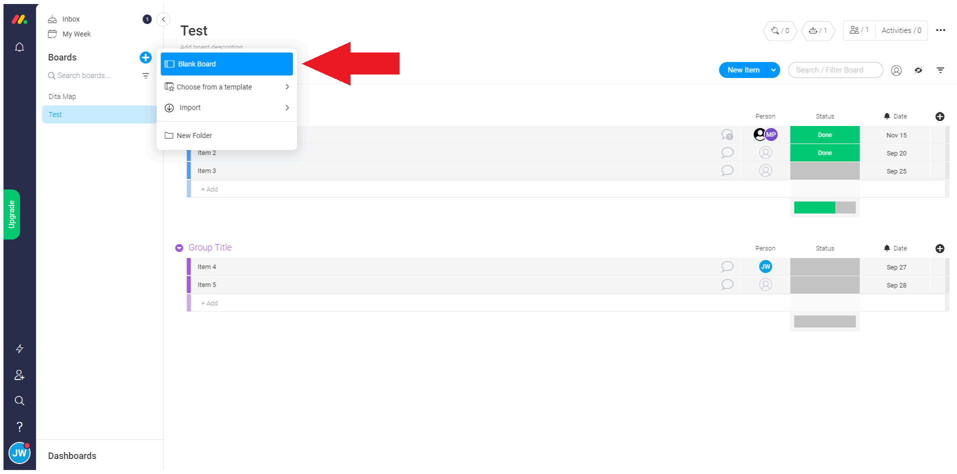
1. From the homepage, click on the blue “+” button on the upper left side of the screen

2. Click on "Blank Board"
   Figure 7. Creating a Blank Board




3. Enter the desired name of the board

4. Select the visibility of the board

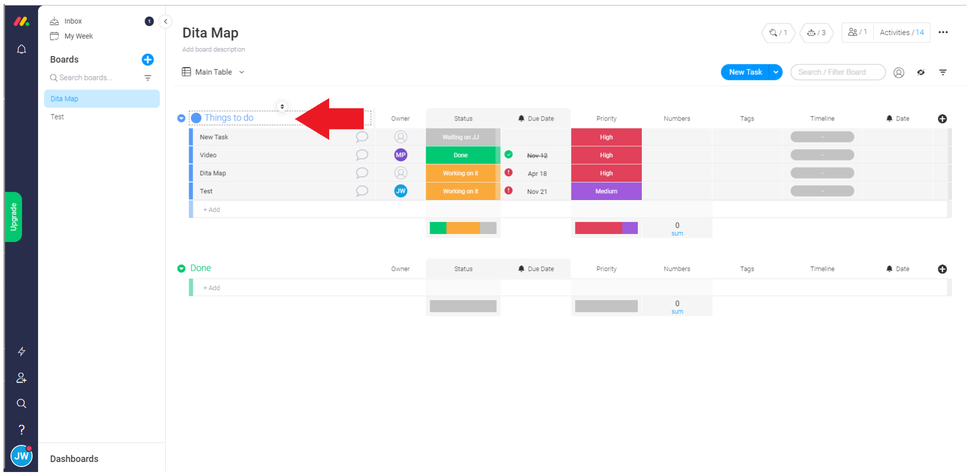
5. Click "Create Board" once desired preferences are chosen

# Editing Group Title

This task allows you to change the title of a group. You would use this if the focus of the group changes, if you change what is in the group, or if the original name that you gave the group is not longer related to the purpose of the group.

You can create different groups of items within different boards so that other people who are on a project can better understand how the board is organized and divided up. You want to give a fitting name to the group because the name will help distinguish it from other groups.

1. From the Board page, click on the “group title” on the top of a board
   Figure 8. Editing the Group Title




2. It will then give you an option to input a new name

3. Type the desired name and hit the Enter key

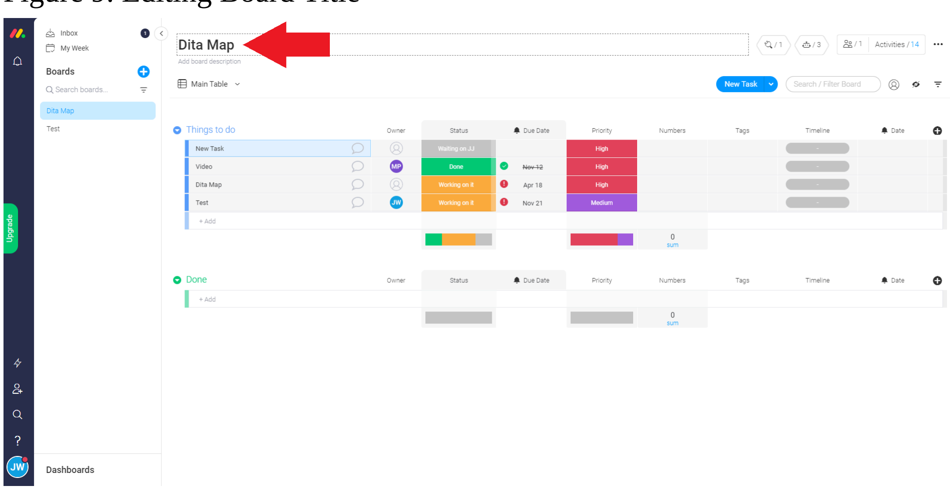
# Editing Board Title

This task allows you to change a board's title on monday.com. You would use this feature in order to change the title of a board if the focus of it changes or if it is re-purposed for something else.

Boards on monday.com are used to contain different projects. You can allow different people access to different boards so that only people who are on a project have access to the board. You want to give a name to the blank board because the name will help distinguish it from other boards. You want to make the board visible if you are ready to reveal the project and you want to make the board invisible if you don't want others to have access to it yet.

1. From the Board Page, click on the desired item to edit

   Figure 9. Editing Board Title



2. A window from the right will appear, click on the title at the top to begin a name change

3. Click on the update tab to bring up a text box that allows users to write and post updates

4. Clicking on the Info tab will allow you to add notes, files, and Questions and Answers

5. Clicking on the Activity Log tab will allow you to view recent changes and activity within the board

# Adding People to a Board

Adding people to a board will allow for collaboration. If people are allowed to collaborate effictivly, productivity of work will increase.

Before you can add someone to a board, you must login and create a board.

On the standard plan you can invite up to 3 people to a board at no cost. If you invite more than 3 people, you will have to pay for a multi user account.

1. From the board page, click on the “+” sign under the person tab.
   Figure 10. Press the Plus

2. A box will pop up with a text box, and a current list of people on the project.

3. Select the desired persons name, or send an email to them.

   An email invite will be sent to the person and they can join the board.

# Editing Board Status

When a project is complete, or an action is taken for the step, the status can be updated. This tells other users that the step is Complete, In Progress, Delayed, or can be given a custom status.

1. From the Boards page, locate the task that needs an updated status
2. Under the status column, click on the box in the necessary task row
3. A selection of status boxes will appear, selcect the appropriate one for the current task status
4. the task status has now been updated

# Adding a Column to a Board

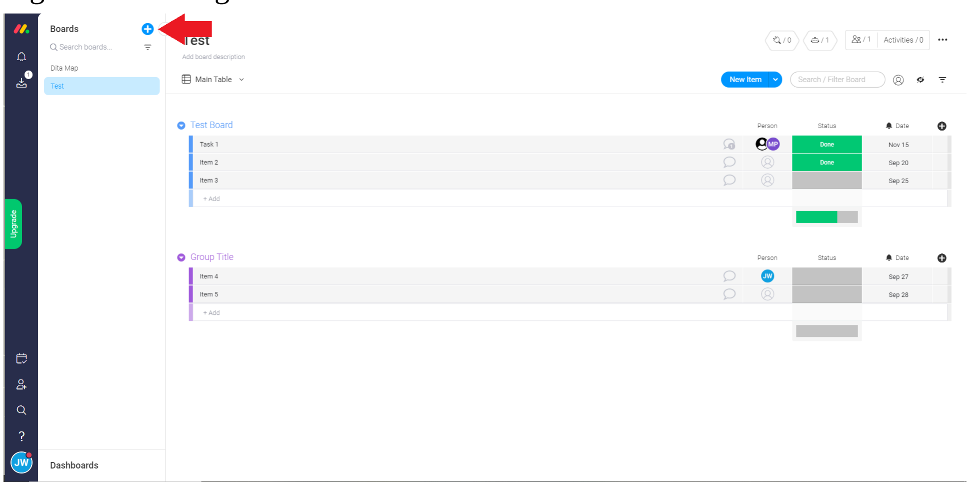
In some cases, an extra column might be necessary for custom fields. Whether it's extra deadlines, timelines, notes, or a custom section, it can be quickly added to the board.

1. From the Boards page, locate the board that will be given another column

2. Select the "+" icon in the top right corner of the board

3. A dropdown will appear, giving options for the type of columns available. Select the best option for your board

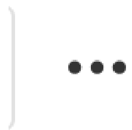
4. A new column will be created, and can be edited from the boards page
   Figure 11. Adding a Column to a Board




# Viewing Archived Items and Groups

A board can be archived and looked at for future reference. These boards will disappear when archived, and can only be found in the Arcbived Tab afterwards. Indivuals items or whole boards are also able to be archived, depnding on what needs to be saved.

1. From a Boards page, select the three dots icon at the top right of the board page
   Figure 12. Menu Button



2. A dropdown will appear, select "Archived Tasks/Groups"

3. The Archived Tasks/Groups Page will now apear, with viewing for any archived items

# Chapter 6. Integrations

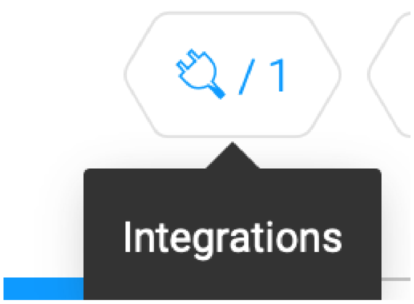
Integrations can be made within the Boards to page to use other company collaborative products, such as Google Drive, Gmail, Slack, and more. This allows users to connect all potential files and messages in one place, and can be done very simply from the Monday Boards page. These integrations can also be turned off at any point if .

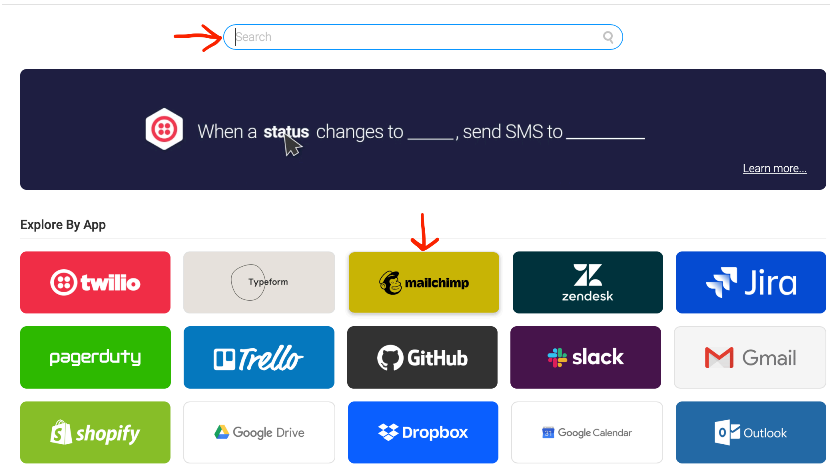
**Related tasks**

- Integrating Monday with Outside Applications *(on page )*
- Turning an Integrated Item Off *(on page 19)*

# Integrating Monday with Outside Applications

Integrations can be made within the Boards to page to use other company collaborative products, such as Google Drive, Gmail, Slack, and more. This allows users to connect all potential files and messages in one place, and can be done very simply from the Monday Boards page.

1. From the board page, click the integration button on the top of the screen. (The icon within the button is shaped like an electrical plug).
   Figure 13. Electrical Plug Icon
   
   
2. You can search for the app in the search bar or look for the app in the app list.
   Figure 14. Select the App you Wish to Integrate.




3. Click the app you wish to integrate

4. Select which option you wish to integrate.

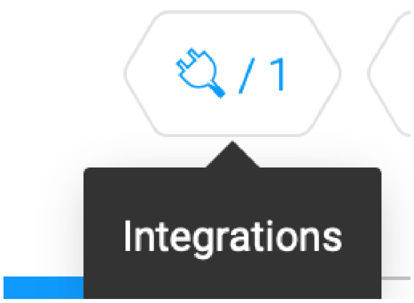
5. Monday will request you sign in or select a connected account.

6. Connect account to Monday and your integration will be active.

# Turning an Integrated Item Off

Integrations may need to be turned off, if your company no longer uses said integration, or it is no longer necessary for the project at hand. It can be quickly turned off from the Boards Page.

1. From the board page, click the integration button on the top of the screen. (The icon within the button is shaped like an electrical plug).
   Figure 15. Electrical Plug Icon




2. Click the Board Integrations tab on the top of the screen.

3. Find the item you wish to turn off and click the green button to turn the integration off.

# Chapter 7. Automations

Automations are used to automatically send updates, notifications, and messages to other users when an action is taken within a board. They Automations can be very broad, or more specific depending on the task at hand. These automations can occur when a status changes, or a new task is added, and have an array of customizable options, as well as pre-made automations.

**Related tasks**

- Creating an Automation *(on page 20)*
- Adding an Automation to a Board *(on page 22)*

**Related information**

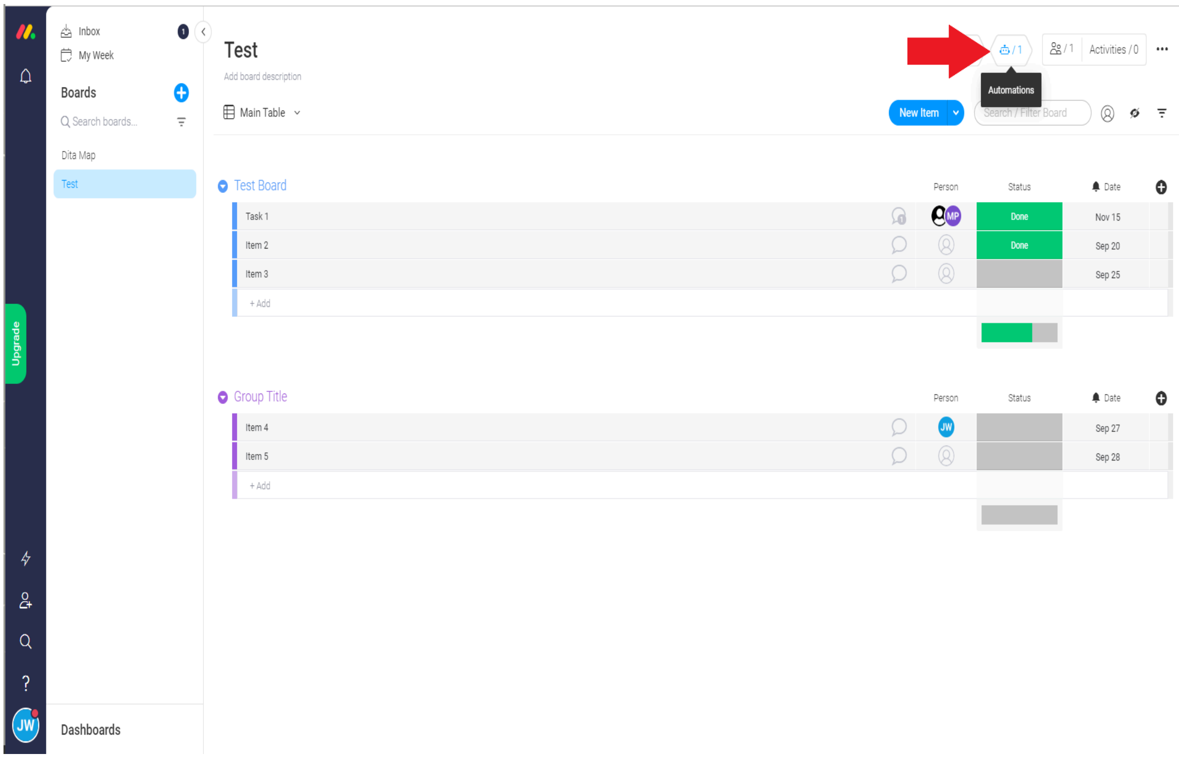
- Automations Center *(on page 21)*
- Automations Center Introduction *(on page 21)*

## Creating an Automation

This task would be performed in order to create an automation for Monday.com that would cause it to perform a task for you. This is a very common task that you should use as it is very beneficial and cuts out a lot of unnecessary work for you. For example, automations can allow an update to occur based on a status update or they can assign a person as the creator of an item when it is created. This prevents a lot of back-work that team leaders and project managers would otherwise have to perform.

The "Automations Center" tab is opened by default when you click on the Automations Center button from the board page. This tab allows you to create automations that Monday will automatically perform for you when you have that automation active. It features multiple categories of automations on the left side of the screen that you can click on to help you find the automation that you are looking for.

1. From the board page, click the “Automations” button in the top right corner of the screen. (The icon within the button is shaped like a robot’s head
   Figure 16. Creating an Automation




2. A new screen will open and you will be in the Automations Center tab by default

3. This is where you can create an automation

# Automations Center

This tab is opened by default when you click on the Automations Center button from the board page. This tab allows you to create automations that Monday will automatically perform for you when you have that automation active. It features multiple categories of automations on the left side of the screen that you can click on to help you find the automation that you are looking for.

## Automations Center Introduction

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## Adding an Automation to a Board

This tab is opened by default when you click on the Automations Center button from the board page. This tab allows you to create automations that Monday will automatically perform for you when you have that automation active. It features multiple categories of automations on the left side of the screen that you can click on to help you find the automation that you are looking for.

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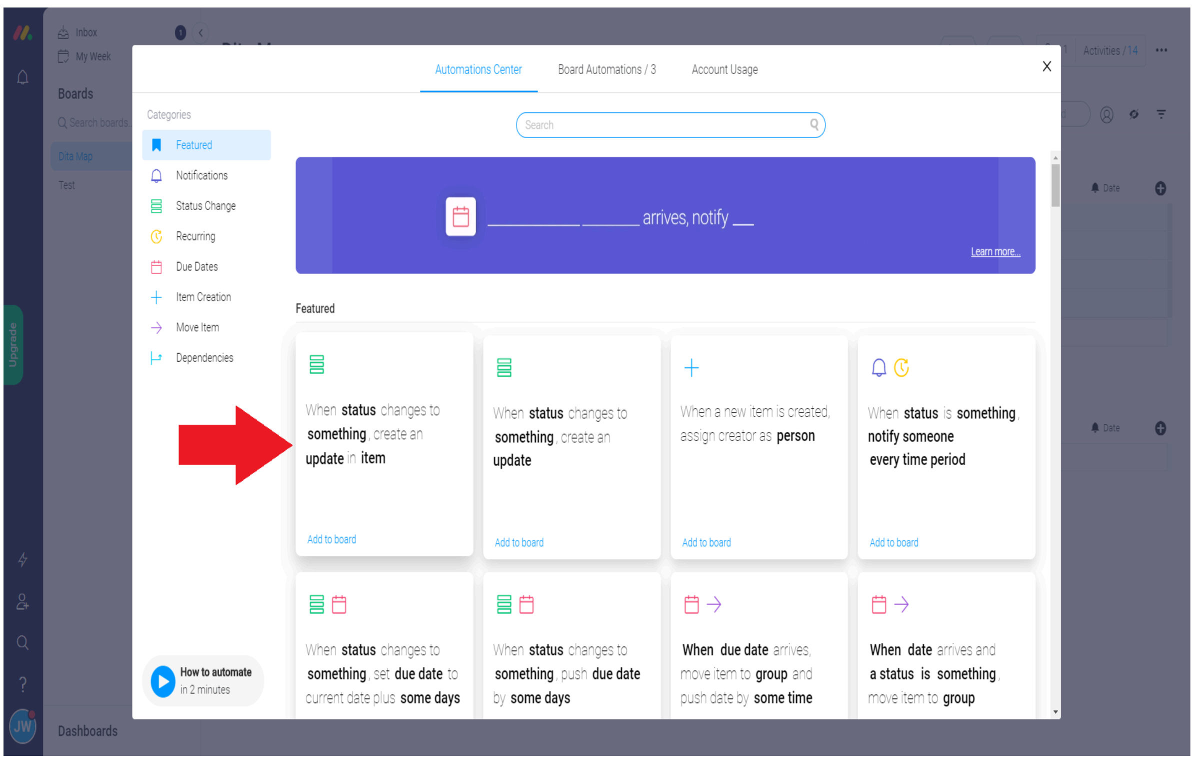
1. From the Automations Center tab, either click on an automation or search for it in the search bar at the top of the page, to add it to your board
   Figure 17. Adding an Automation to a Board
   
   

2. After clicking on the automation, a new screen will appear that allows you to edit what the automation does

3. After editing what the automation does, click the “Add to board” button in the bottom right corner of the screen

4. The automation is now added to your board