VASTAFFER

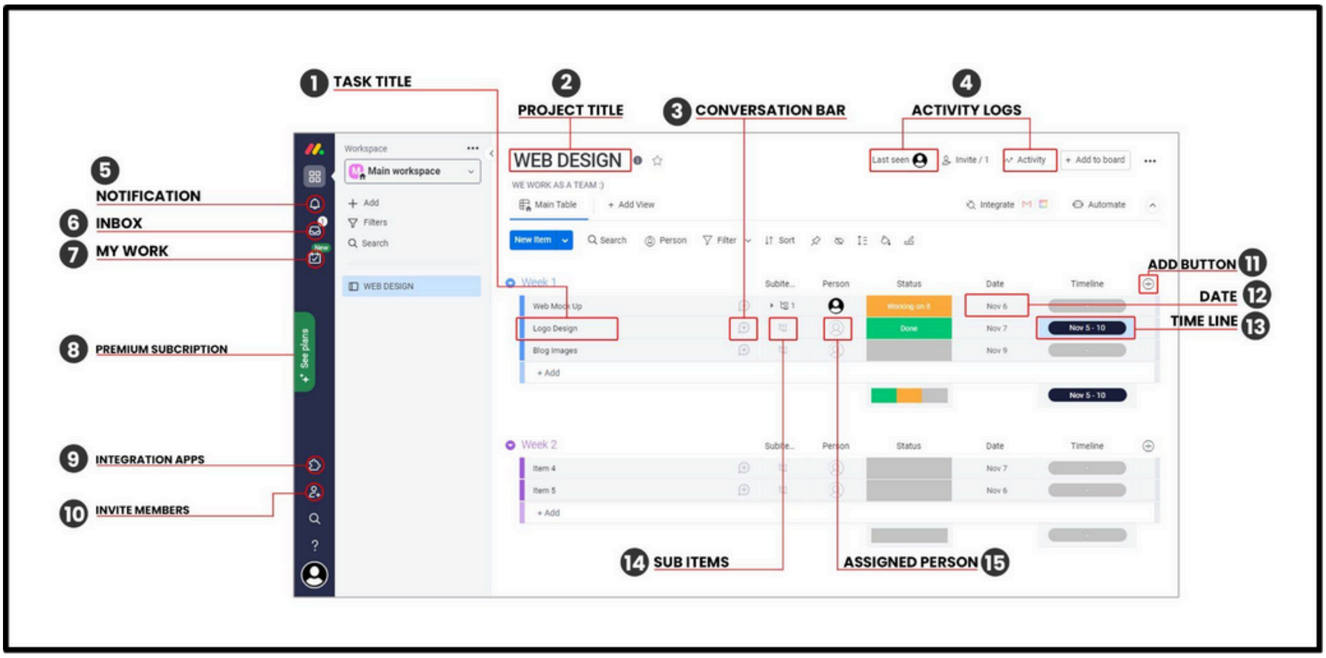
HOW TO USE MONDAY.COM EFFECTIVELY

What is monday.com?

monday.com is a Work Operating System (Work OS) that powers teams to run projects and workflows with confidence. It is a cloud-based platform that allows companies to create their own applications and work management software.

It's a simple, but intuitive, Work OS for teams to shape workflows, adjust to shifting needs, create transparency, connect collaboratively, and stop doing manual grunt work. monday.com makes teamwork click.

DASHBOARD OVERVIEW



1. Task Title - have a direct bearing on you and your team's ability to understand the work that needs to be done and your teams' ability to do it effectively.

2. Project Title - describes the whole assignment or project in one sentence.

3. Conversation Bar - it is used to create conversation or put some updates about the project tasks.

4. Activity Logs - is where you can see the record of how you spend your time or who are the persons viewed the project tasks.

5. Notification - notifies you every time the task is complete or action has been taken within your team. It will also notify you from your linked email so that you cannot miss a thing.

6. Inbox - Used for internal communication within your team.

7. My Work - here you can see what the job is scheduled for you.

8. Premium Subscription - to benefit from additional features not included in a Basic Account.

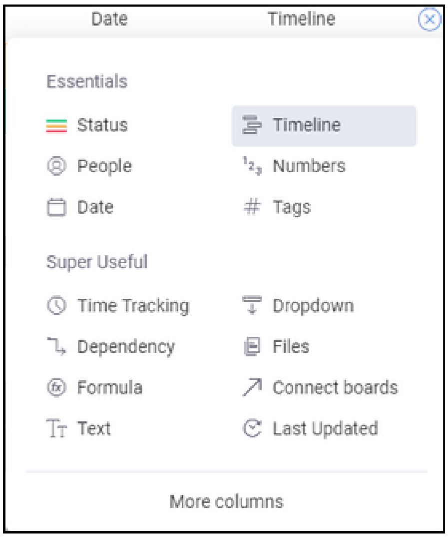
9. Integration Apps - applications that work together with monday.com.

10. Invite Members - Used to add relevant members for the project to be done.

11. Add Button - By clicking the add button you can simply add some columns to your project dashboard.

12. Date - Date of the project task started.

ADD BUTTON VIEW



13. TimeLine - To set the due date of a task to be done.

14. Sub-Items - Used to add some particular item related to the project task.

15. Assigned Person - In this button, you can edit whoever you want from your team to complete the project task.

The Dashboards

Dashboards are a great way to display what's important in just one place. With 15 available widgets, users can now understand project progress, track budget, estimate teammates' workload, and much more! It helps to keep your team focused and motivated on high-level goals and boost productivity!

What are dashboards?

Dashboards are here to facilitate your workflow and make sure you stay updated on what is happening on multiple boards. Create summaries, reports, and get a high-level view of everything that is important to you! Select and organize groups from multiple boards in one dashboard. Centralize your data in one location, and use our widgets to have all the tools and information you need in one view.

TYPES OF DASHBOARDS

- PROJECT MANAGEMENT
- SALES PIPELINE
- SPRINTS
- TRACKING PAYMENT
- CREATIVE PROJECTS
- MARKETING CAMPAIGNS PLANNING
- CONTENT MANAGEMENT CALENDAR
- LEAD MANAGEMENT
- Etc.

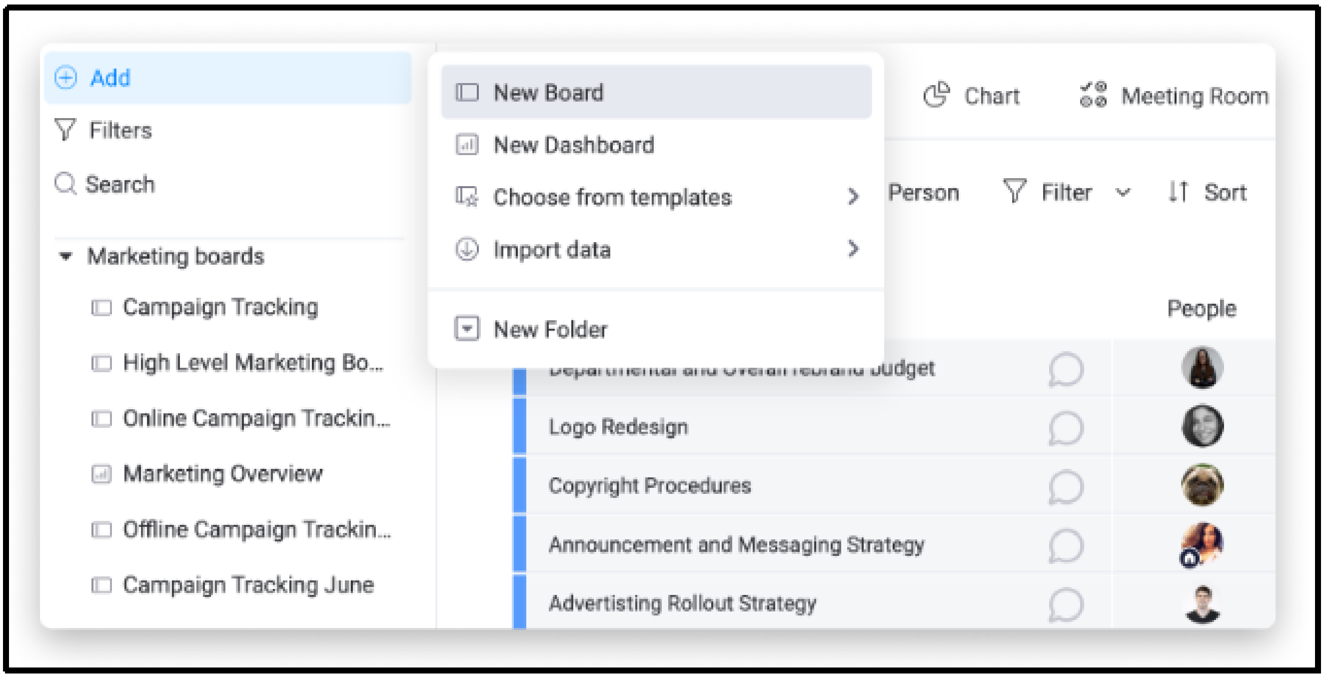
Things to do to set up your own projects in monday.com

monday.com gives teams the ability to build custom work applications for any workflow. You can construct your applications to meet your specific operational requirements and make your platform insanely valuable. From precise project planning to detailed jargon, the platform naturally modifies itself to be 'to each their own.'

Follow this link to get started: monday.com

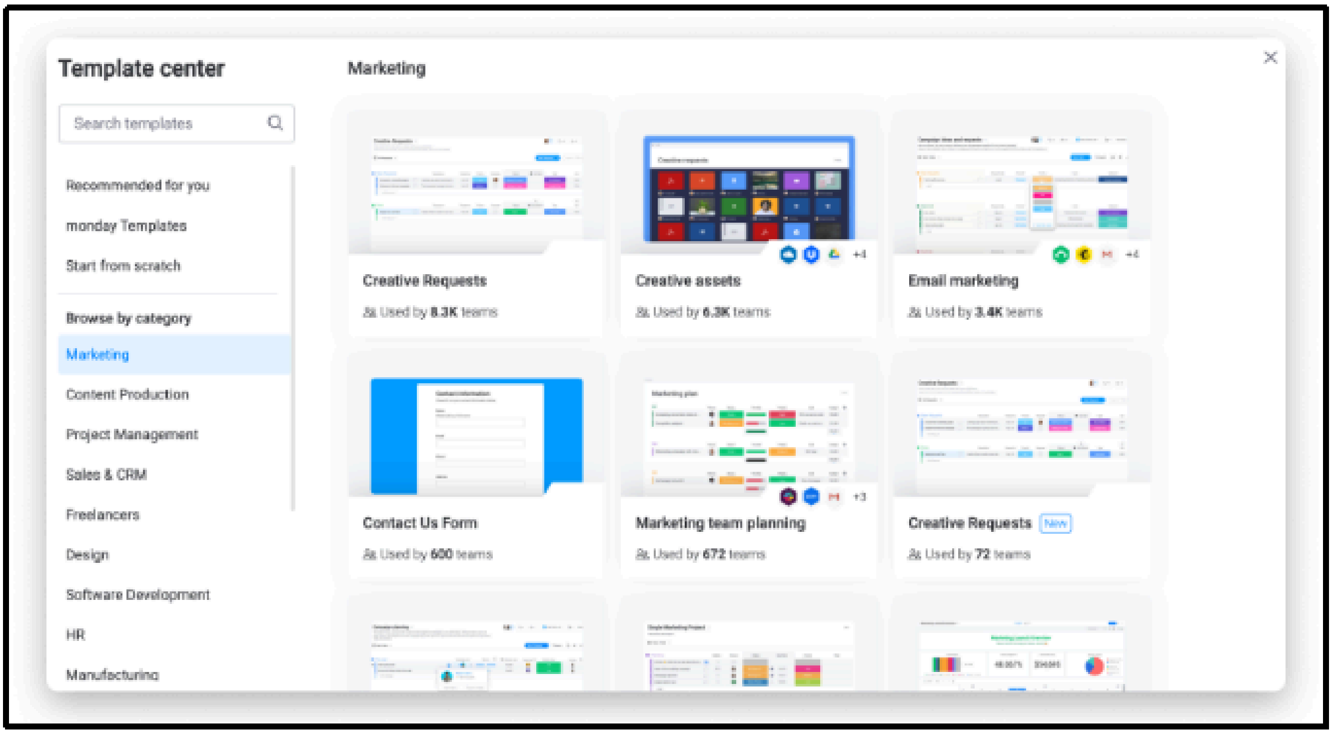
STEP 1 - Create a board

A board is a place to organize everything you need to do - a project, a to-do list, CRM, schedule... With multiple board types, our Main boards create transparency within the company, all users in the account can see and use these boards. Shareable boards can be used with outside guests and Private boards are frequently used for confidential work. Check out this article to learn more about each board type. You can customize all boards to your needs. We will start with our main boards, just click "New" and name your board!



STEP 2 - Choose a template

We offer pre-defined templates to help easily get started or you can start from scratch and customize to your needs. Check this out to learn how to use the board templates

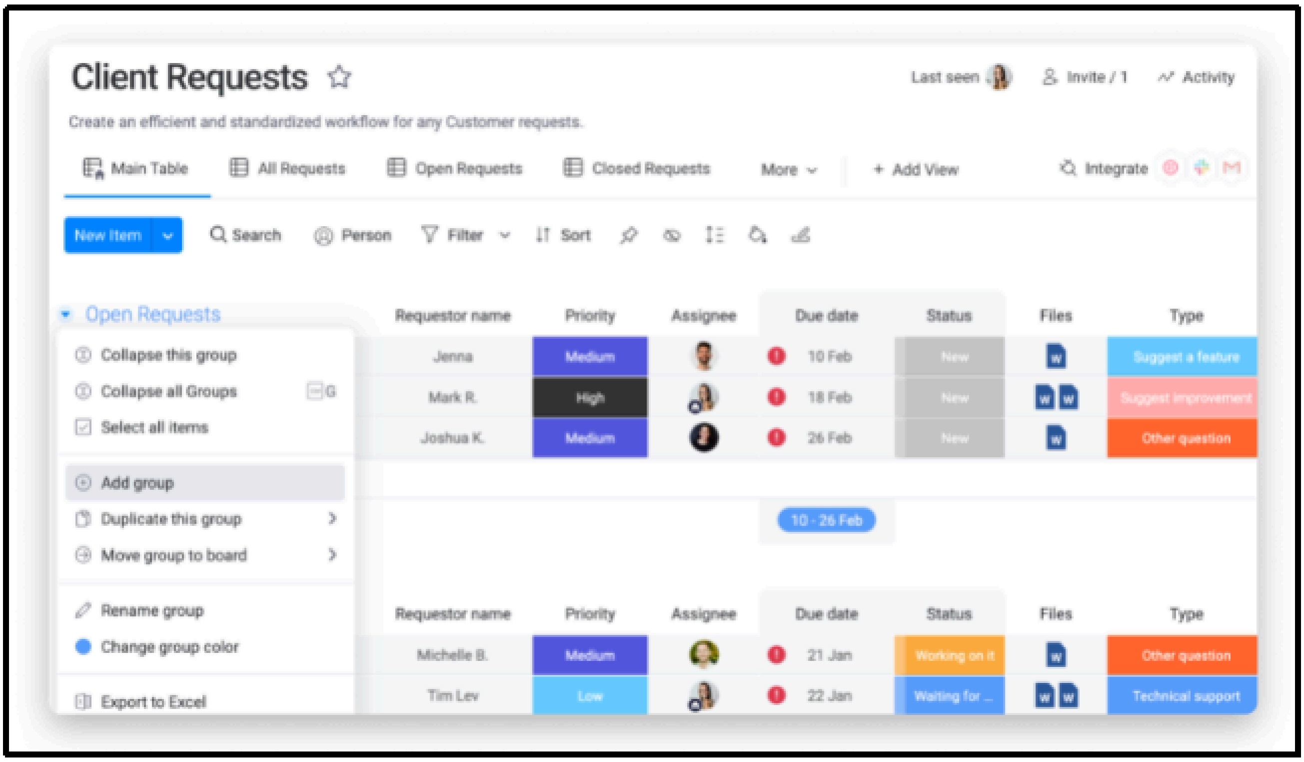


To add a template, simply click on "choose template". You can also select the option "start from scratch" to start with a blank board.

STEP 3 - Create your groups

A board is made of groups. A group is a color-coded section on your board that will contain your tasks. A group can be a week, a month, a specific step of a project, or whatever you want.

To add a new group to your board, hover over the title of any existing group and you will see an arrow appearing on the left side. Click it and choose "Add Group". Alternatively, clicking on the down-facing arrow next to the "New Item" button will also allow you to add a new group.



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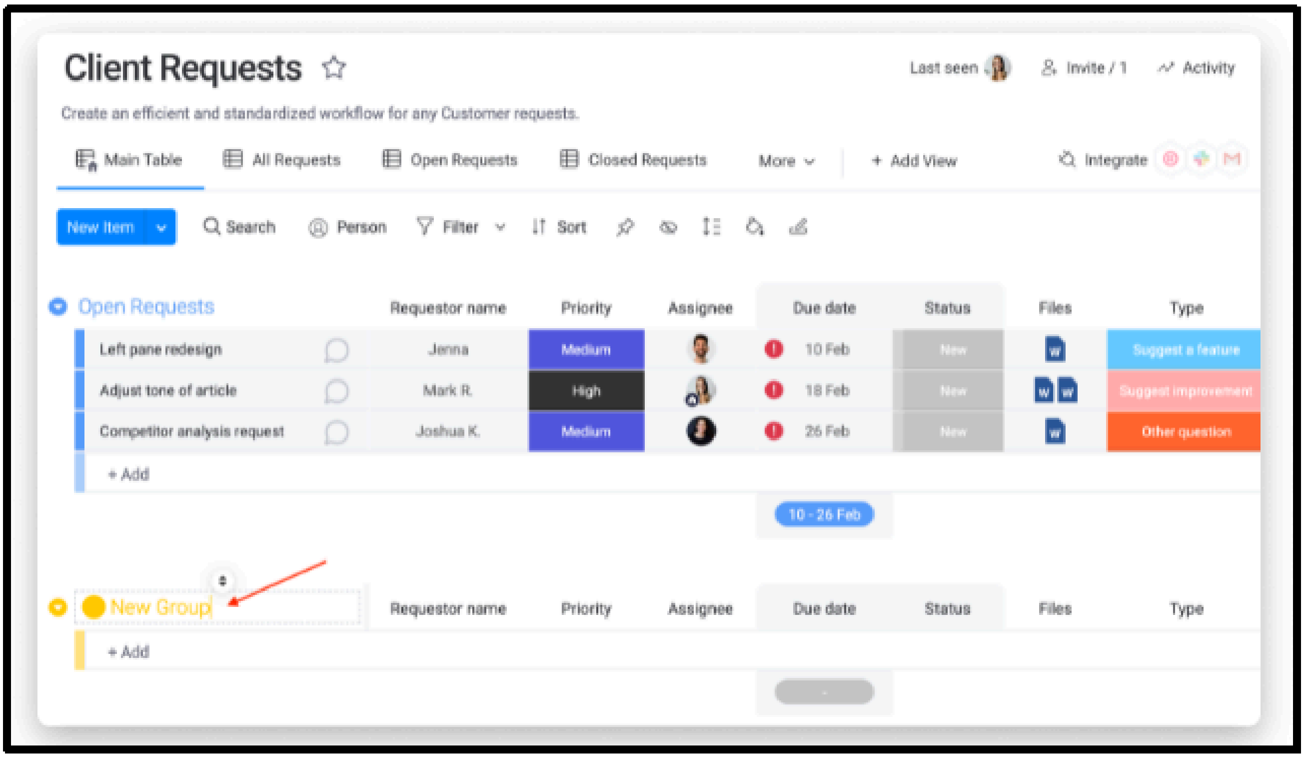
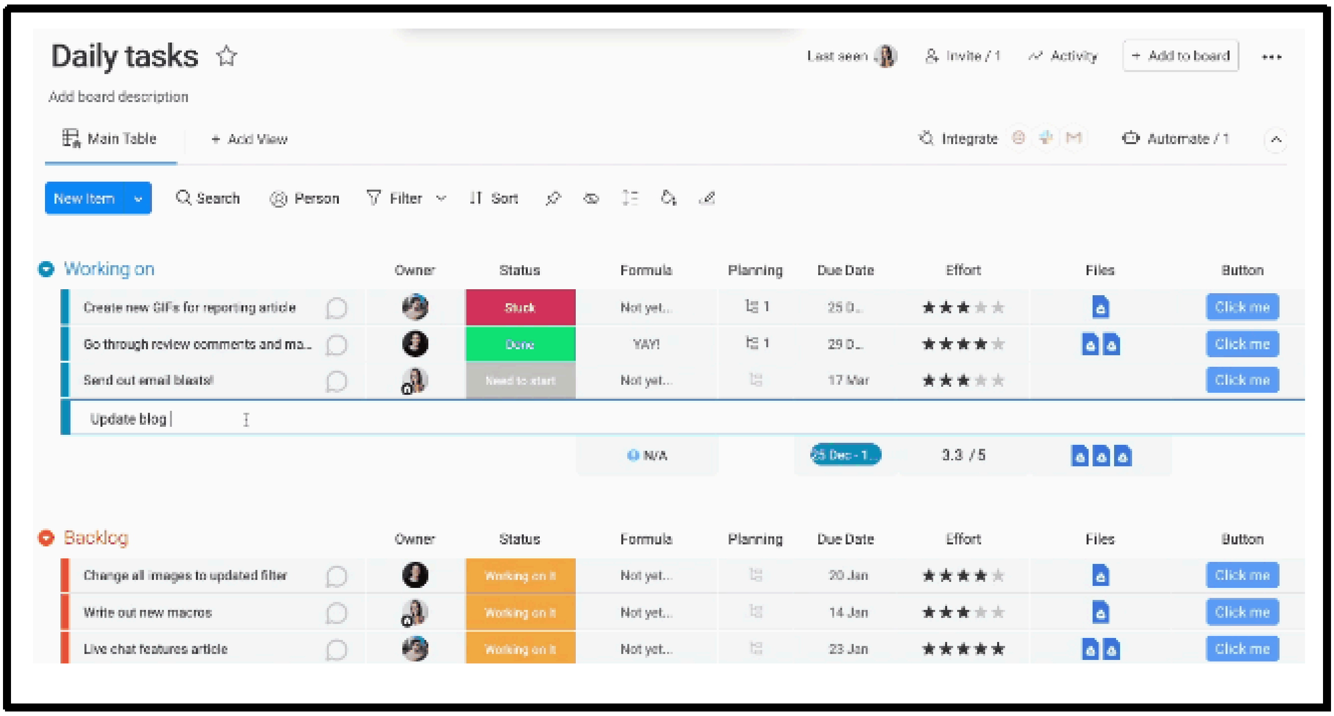


After renaming the group as you wish, press enter, and you are done!

STEP 4 - Add your items

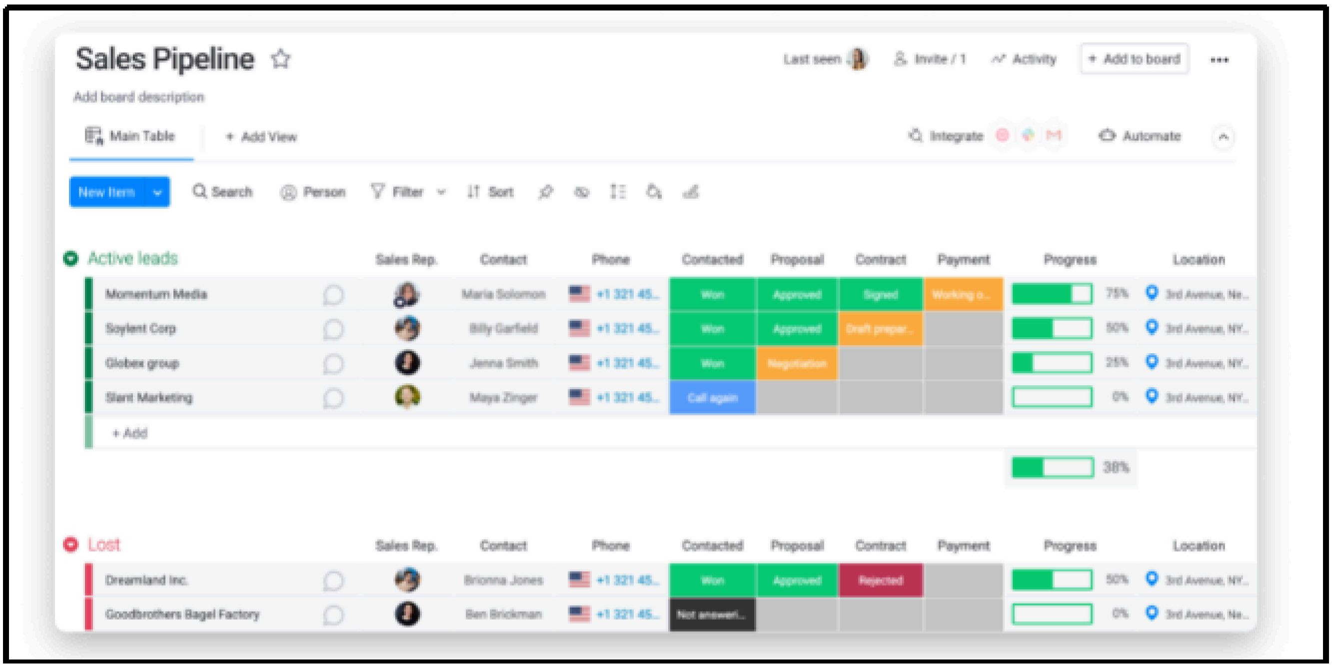
Now that you've created your first board, you can start to create new items which is an individual row (or line item) in a group and they can represent anything and everything from tasks, projects, clients, and more, according to the set-up that you choose to create!



STEP 5 - Add your columns

So, now that your tasks are listed, it's time to start adding columns. Think of the columns as a way to represent any kind of data relating to your items, or as a way to build out a process needed to complete the items on your board. monday.com offers many different column types to

fit your needs, from a People column to a Status column, Formula column, Date column, and much more! Check out the full list here.

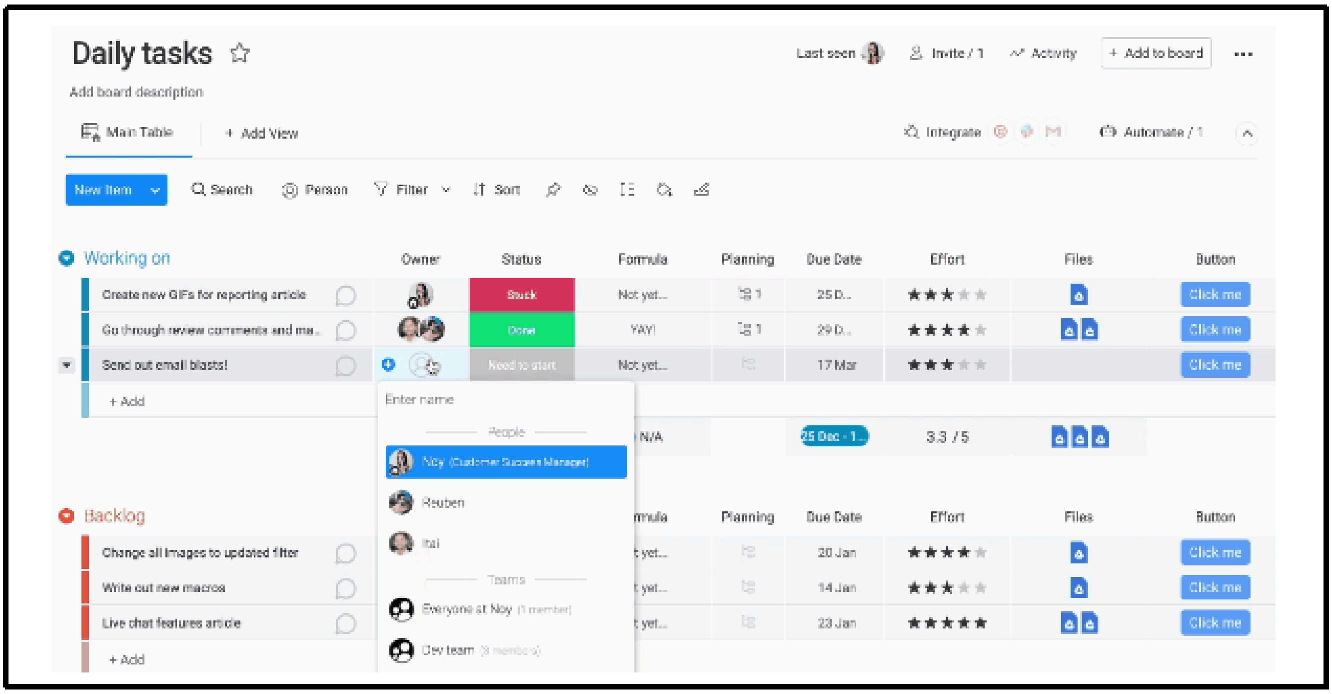


Once you have your tasks listed and your columns created, you can start getting the team working on the board.

STEP 6 - Start turning things Green

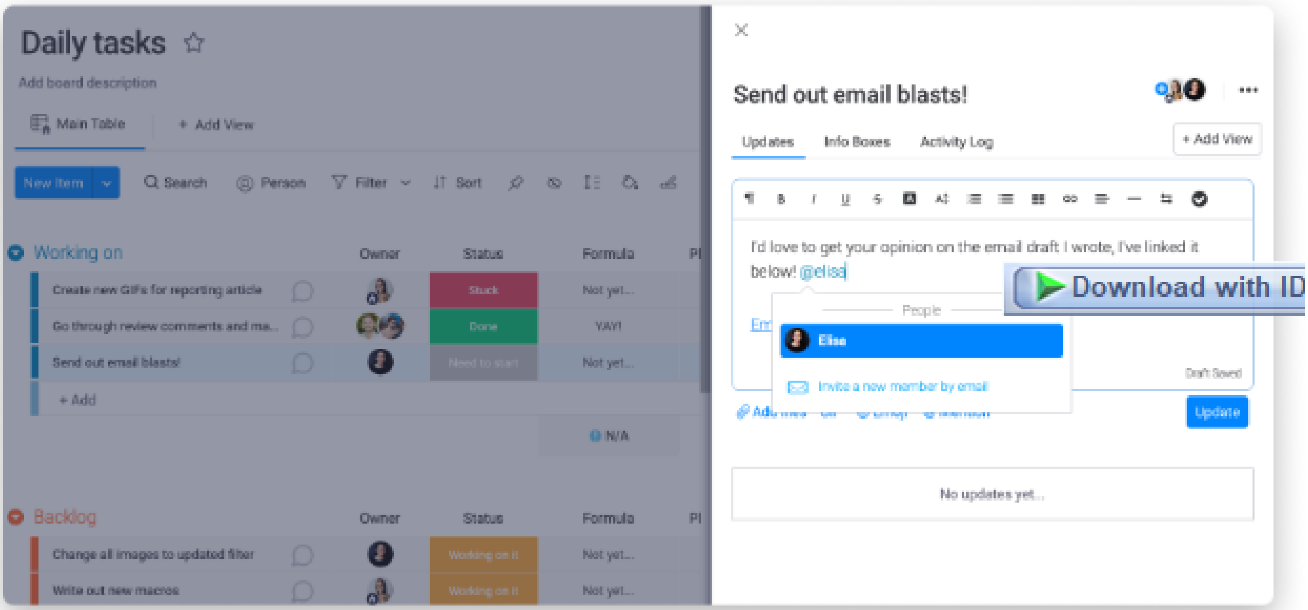
Assign Tasks

monday.com brings transparency and relevance to all your team members, allowing everyone to see the big picture of a project and really find purpose in their work. All team members can see the various aspects of a project and collaborate within — but first giving ownership to each step is key. Use the People Column to assign a task to a team member! The person assigned will receive a notification letting them know they are now assigned to a task and can get working.



Communicate within the task

Use the updates section to keep everyone in the loop; ask questions, write updates, upload docs, and add some laughs with our gifs. You can use the @mention to communicate with your team. Check out this article to read more on how it works.



Subscribe to board

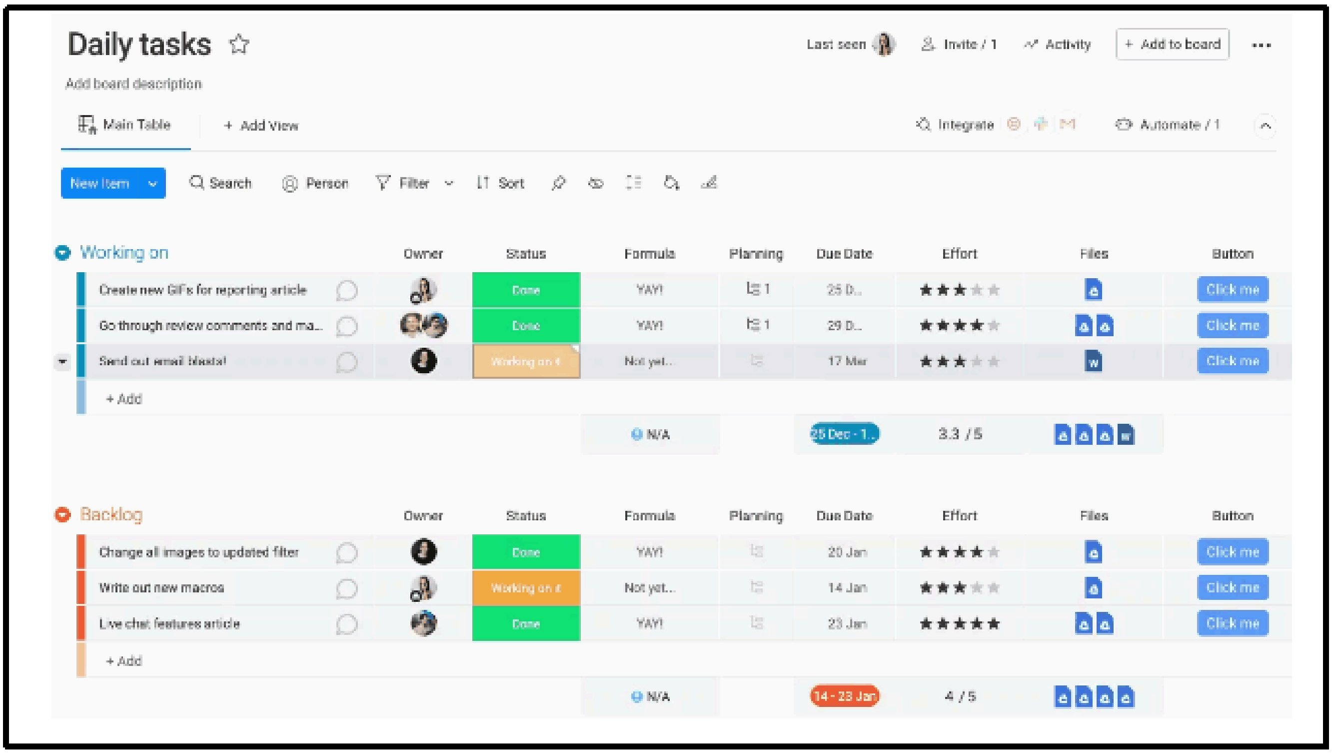
Use the subscribe option to keep everyone on top of projects or follow the projects you are interested in. By subscribing to boards you can easily organize the important boards you visit, but most importantly you will receive updates on all tasks within your inbox.

Stay up-to-date

All your updates from boards you are subscribed to (following) are instantly listed within your personal Inbox, never miss an update!

Update your tasks

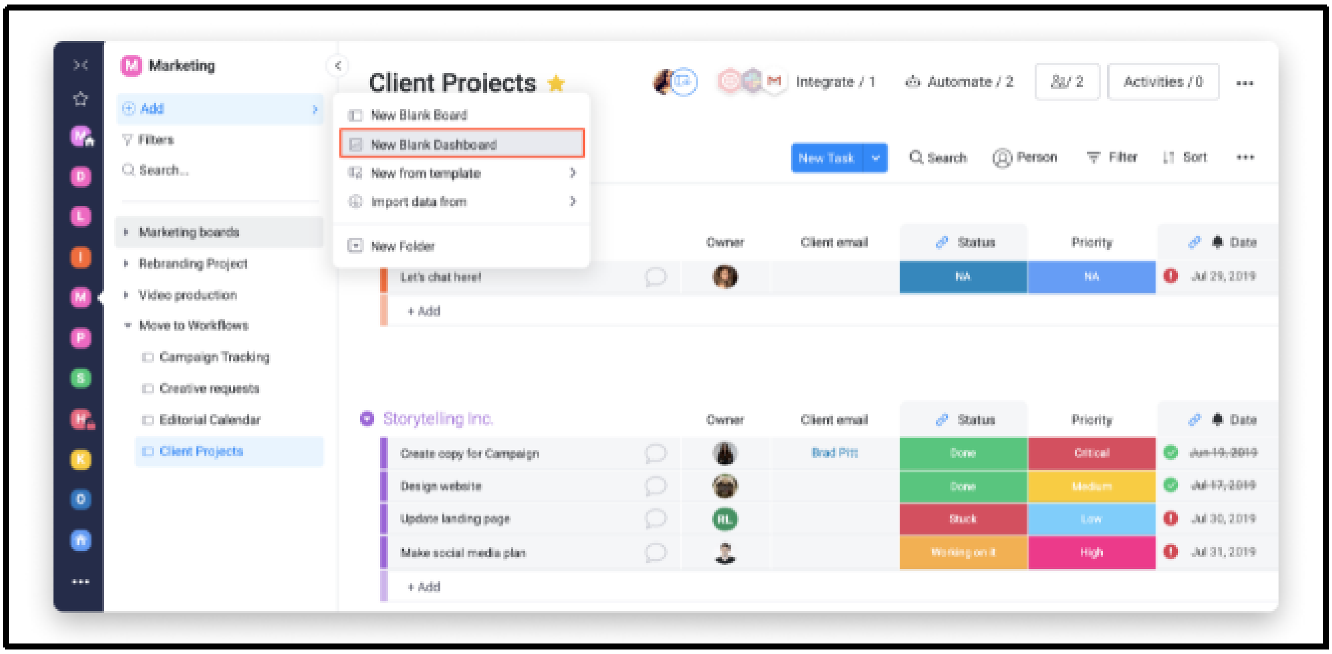
Use the status column to mark your progress. Nothing is prettier than seeing a green board, this means that all is done!



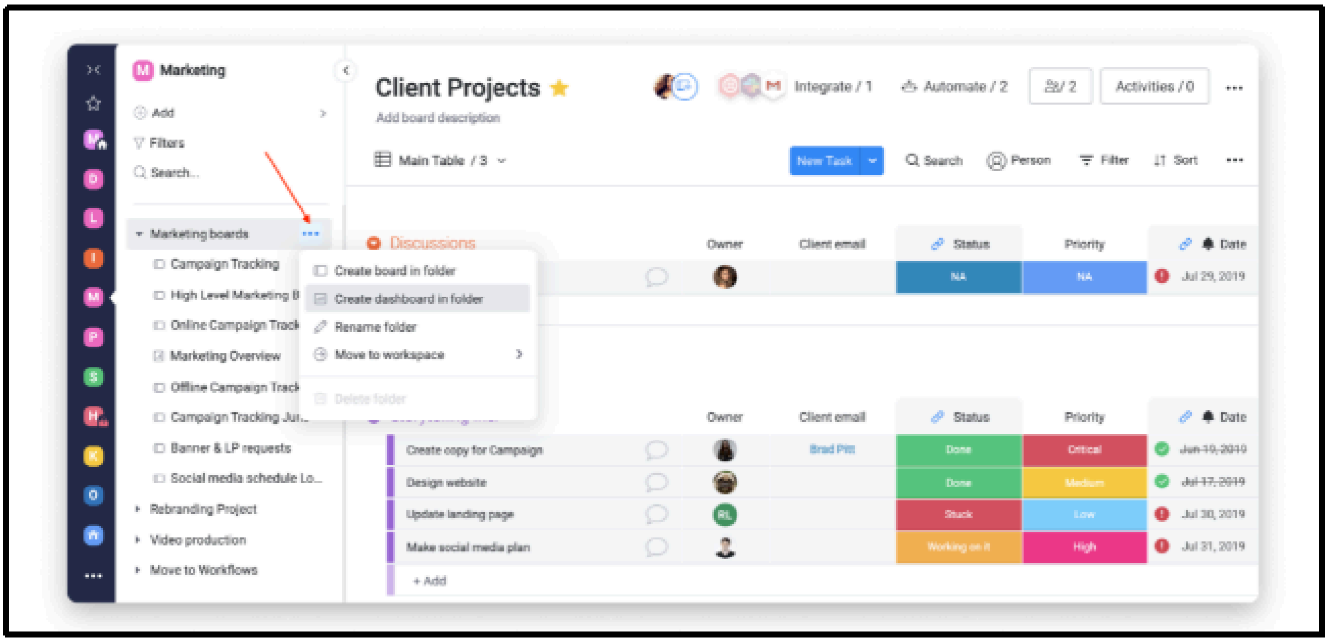
Add a dashboard

STEP 1 - Add a dashboard

Click on the + Add icon located next to the workspace you'd like to add that dashboard to. Next, click on "Dashboard" as shown below:



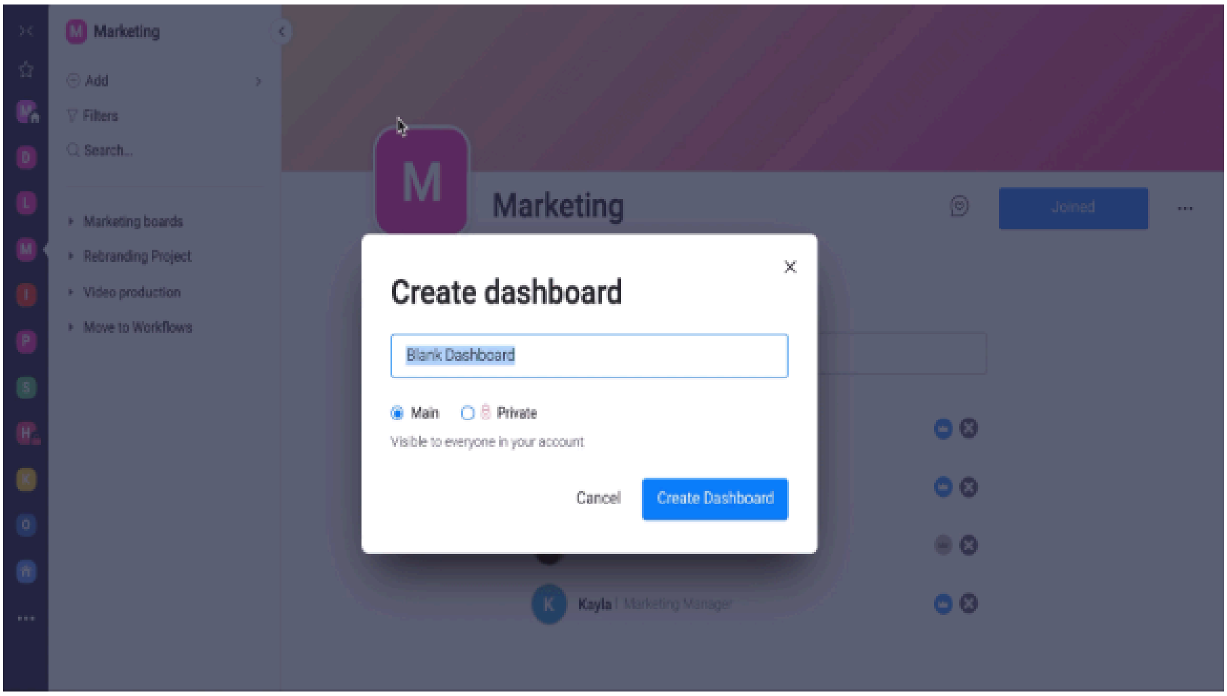
Alternatively, you can also add a dashboard directly from your preferred folder. Click on the three dots menu next to your folder's name and click on "create dashboard in folder" as shown below:



STEP 2 - Choose your dashboard type

You can choose whether you want your dashboard to be public or private.

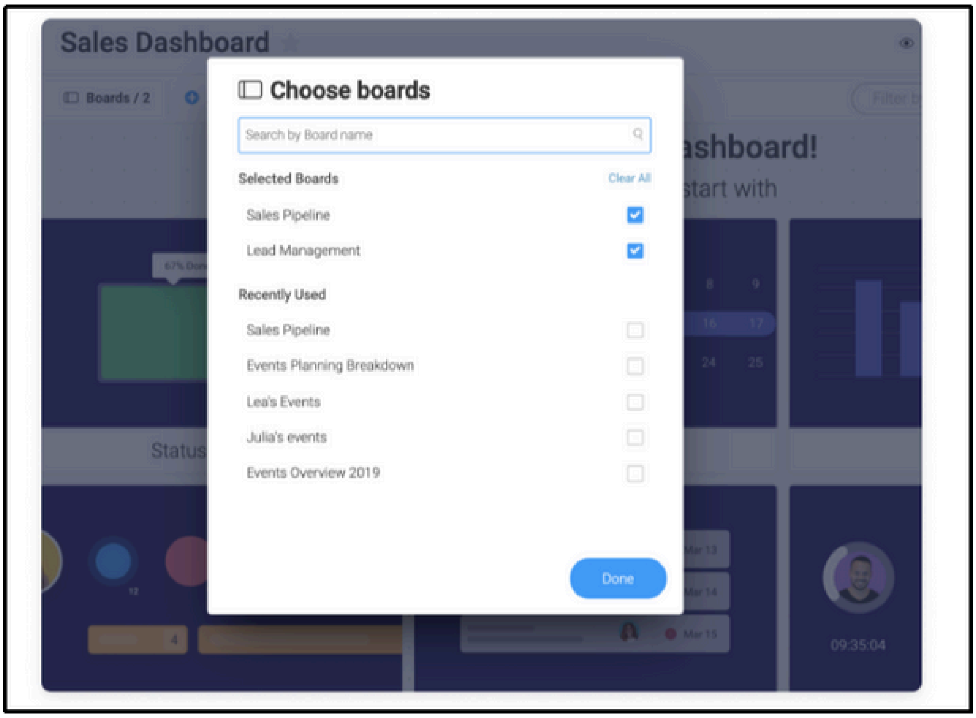
- If your dashboard is public, it will be visible by everyone in your account
- If you choose the private option, your dashboard will be visible by yourself and the selected team members you are inviting to it.



We will be explaining this further later on in this article.

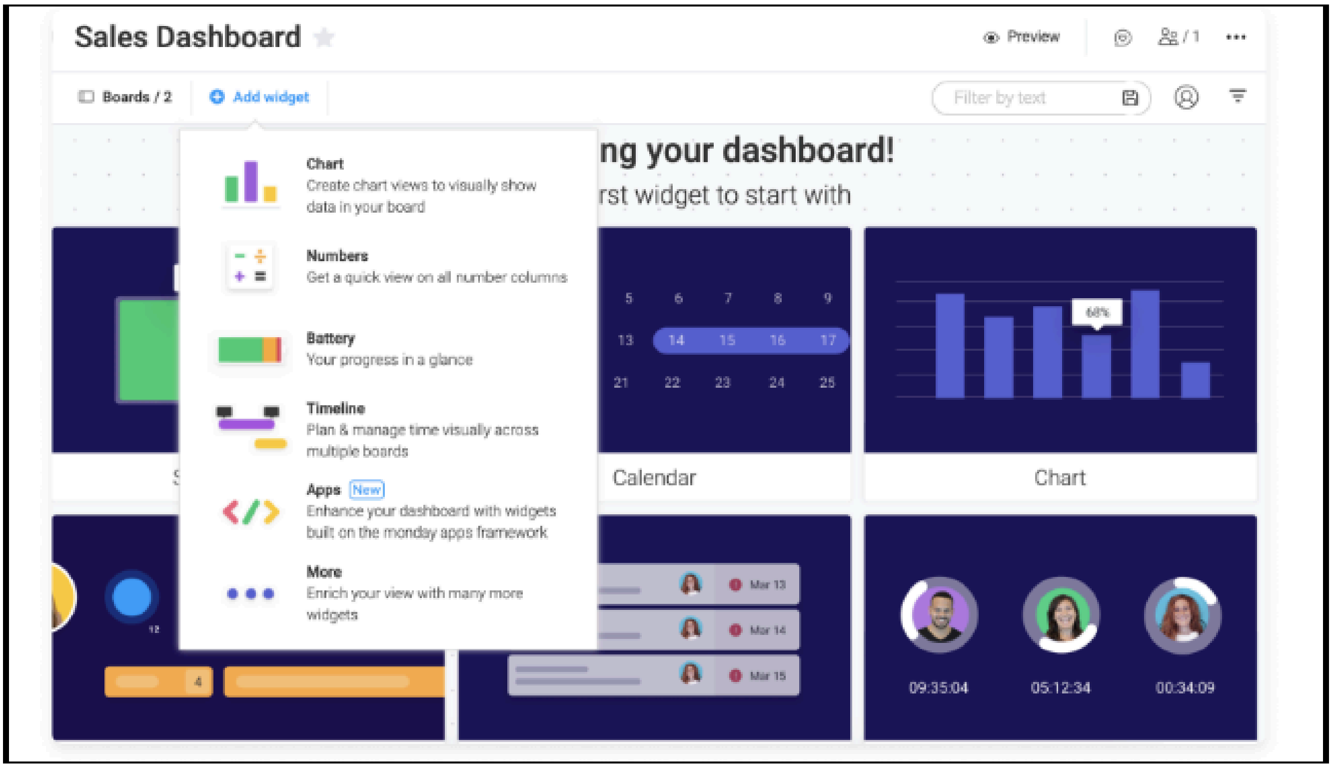
STEP 3 - Pick your boards

Click "Boards" in the top left corner of your dashboard to select the boards you'd like to connect to your dashboard. When you begin to connect your boards, you'll see a list of recently used boards for your convenience. If you are looking for a specific board, you can search for it in the search bar! When you are finished, click "Done" and head to the next step!



STEP 4 - Add the widgets

Your dashboard is made of different widgets. You can use each widget to display specific information from any board. To add a new widget, simply click on the add widget icon and select the type of widget you would like to display.



Who can see my dashboard?

There are two types of dashboards: Main Dashboards and Private Dashboards.

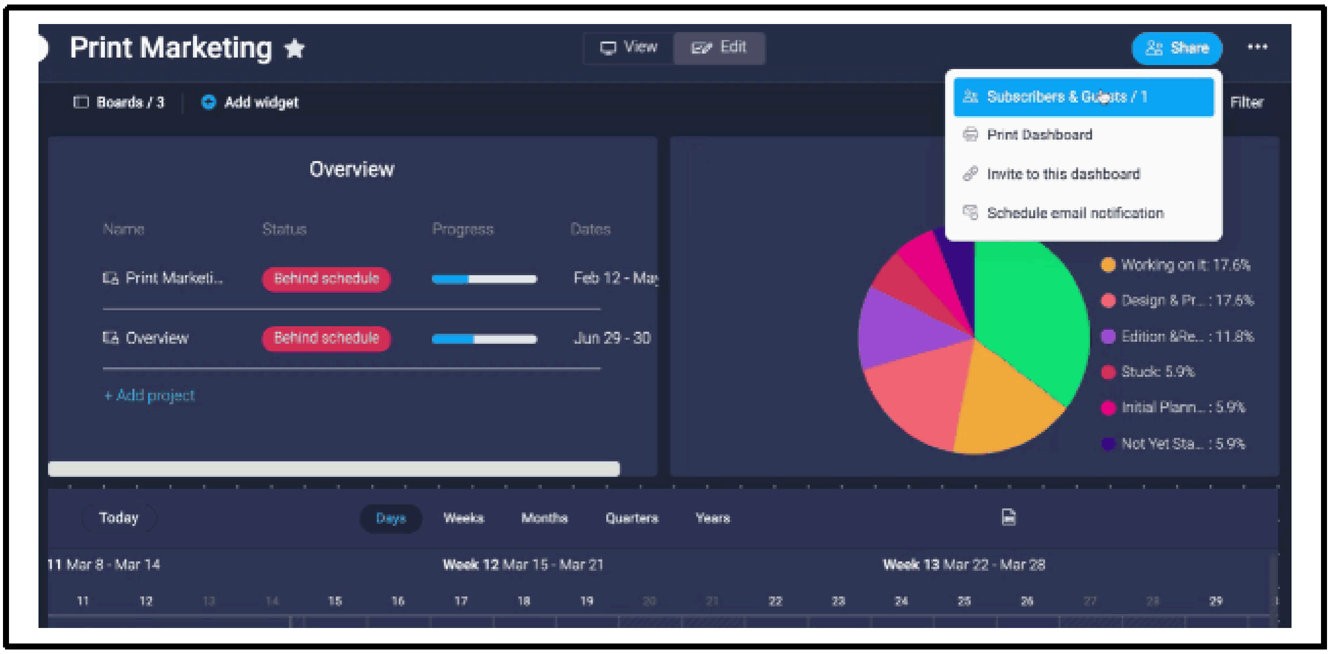
Main Dashboards

If your dashboard is the Main Dashboard, everyone in your account will be able to see it. In your Main Dashboard, you can also invite guests.

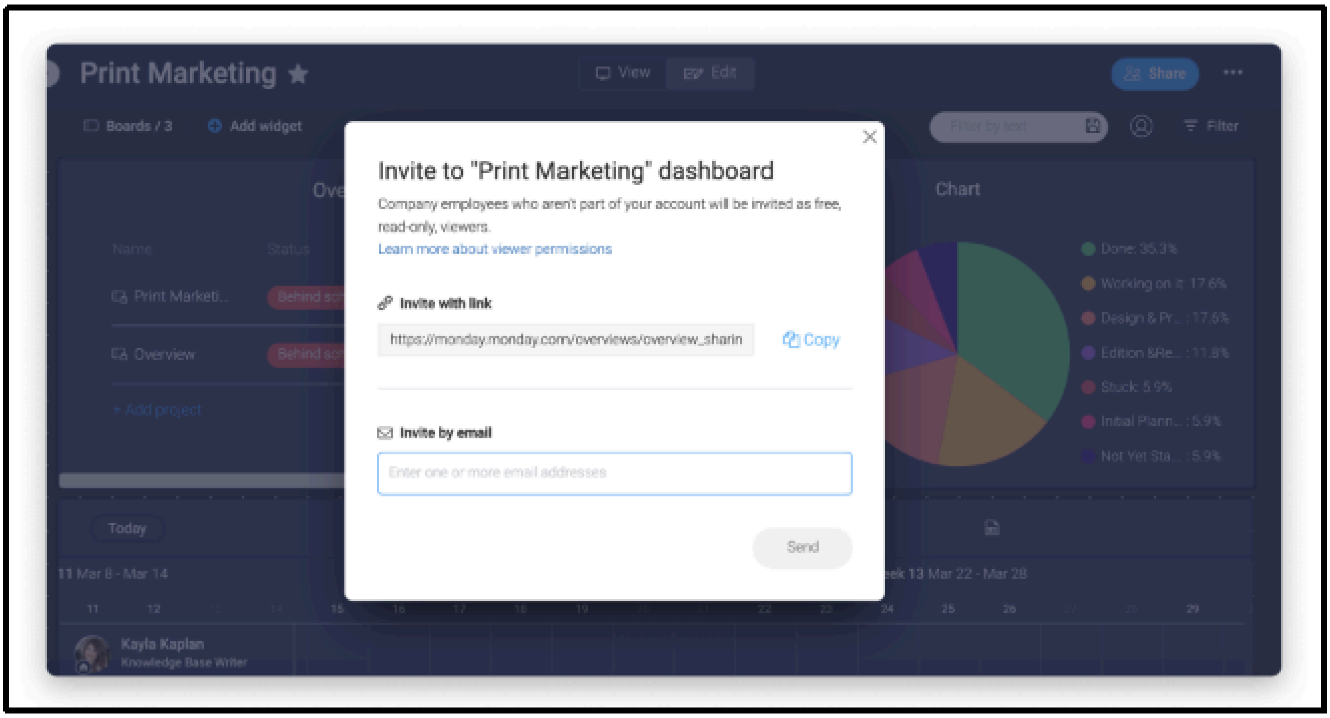
Private Dashboards

If you choose the private option, then your dashboard will be visible to yourself and the selected team members or guests you are inviting to it.

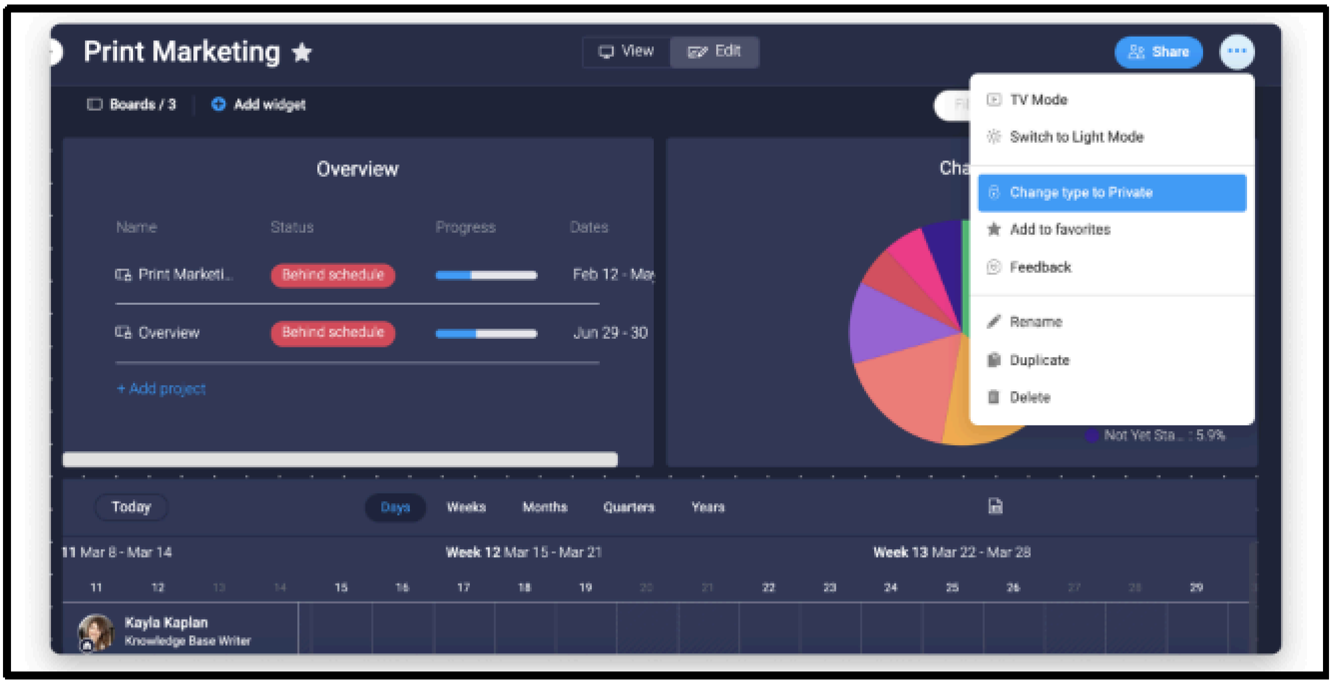
You can share your Private Dashboard with your team members and guests super easily! Click on the "Share" icon located on the upper right of your dashboard. Click "Subscribers & Guests" to invite your team members or guests.



You can also share your dashboard with colleagues who aren't part of your account! Click on the "Share" icon located on the upper right of your dashboard. Click "Invite to this dashboard" to send a link or email invitation to your colleagues to make them read-only viewers of your dashboard.



You can change your dashboard from main to private and vice versa at any point. Click on the three dots menu located on the upper right of your dashboard and select "change type to" as below:



Here are some links that provide clear tutorials about how to set up a monday.com account.

YouTube

https://youtu.be/piDQKQmr2H4

Step by Step on Setting Up Link:

https://support.monday.com/hc/en-us/articles/115005305649-How-to-get-started-with-monday-com

Step by Step on Adding Dashboard:

https://support.monday.com/hc/en-us/articles/360002187819-What-are-the-Dashboards-?abcb=56961

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Jeff J Hunter
Founder VA Staffer
Pre-Trained, Pre-Vetted Executive Assistants

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