

How to Use Monday.com Board

1. You will receive an email to set up your account. Accept the invitation and set up your password. Multiple people in your office can be added to see and manage the board.

Trent Wehrhahn invited you to monday.com

monday.com is the Work OS that powers teams to run projects and workflows with confidence.

Accept Invitation

Your Account's URL:

hcubemarketing.monday.com


Your Login Email:

2. You will see a page like this.

The screenshot shows a Monday.com board for 'My Care Dental'. The board has a table with columns for Item, Person, Priority, Status, and Due Date. The 'Current Tasks' section contains three items: 'career page first draft' (Working on it), 'Apple Maps Citation Verification' (Not Started), and 'holiday and closure dates 2022' (Not Started). There is also a 'Completed Tasks' section which is currently empty.

Item	Person	Priority	Status	Due Date	
career page first draft	[Avatar]	Normal	Working on it		
Apple Maps Citation Verification	[Avatar]	Normal	Not Started		
holiday and closure dates 2022	[Avatar]	Normal	Not Started		
+ Add Item					

3. Under Item, see the task that is being assigned to you.

4.  This symbol brings up a chat window so you can see all the details required. At the top is the name of the task, default chooses Updates. Next to that is files. You can drop files into the main box on updates, or in the files folder.

The screenshot shows a chat window for 'link social media accounts'. The window has tabs for 'Updates', 'Files', 'Activity Log', and 'Info Boxes'. The 'Updates' tab is selected. There is a text input field with the placeholder 'Write an update...'. Below the input field, there is a checkbox labeled 'Write updates via email:'.

5. To begin a thread of conversation, you must use **@name** of person you are addressing in order to tag them for a notification. Then type your message, and add files if required. **BE SURE TO CLICK ON THE BLUE REPLY BUTTON TO SEND THE MESSAGE.**

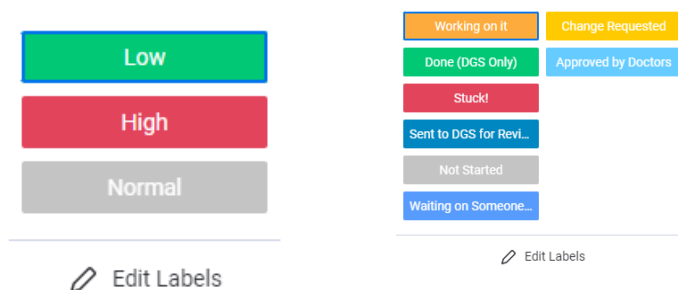
The screenshot shows a chat window. On the left, a message from Jessica Ross says '@Devon Bidal Waiting on branded image - on hold for now'. On the right, a reply from Angela McMullen is shown, with the text '@Angela McMullen' and a blue 'Reply' button. The reply is marked as a 'Draft Saved'.

- To answer a question or approve files for a task, you must always answer by clicking the reply button at the bottom of the comment or files.



If you click on the top field that says write an update, it starts a whole new thread of conversation. This confuses the date timeline and makes it difficult to follow the task to completion.

- Choosing the reply button automatically tags the person you are replying to. You can add other tags to include more people if you need them to see it as well.
- After updating your message in the chat box, “X” out of that box.
- The next box shows you who the task is assigned to. It can be one or multiple people.
- The Priority level and Status are next. When you click on these boxes you get dropdown menus to choose the level of priority and status. You can customize if needed.



- Finally a due date can be set if required.

You should receive emails from Monday.com anytime you are tagged or assigned a task. This will help to keep you up to date with the status of the work being done on your account, and allow for a seamless process to get information back and forth.

Multiple staff on our team work together to ensure the right things are being done. This is why emails directly to one individual may cause a delay in accomplishing our goals.