Softline's step by step guide to set up monday.com
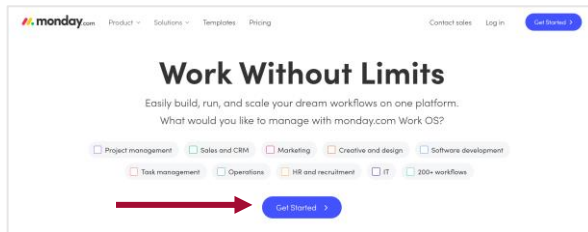
- How to purchase -

Register an account on Monday.com in order to start a Trial. Go to Monday.com webpage and click on "Get Started" as shown below.
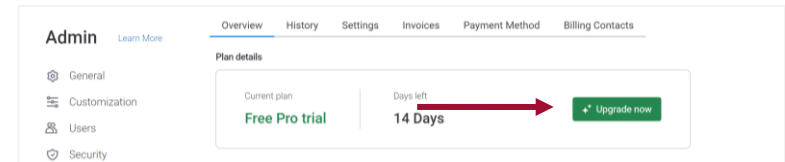

Provide your email and password in order to register an account.

A trial enables you to create a temporary account tenant and to test the solution. After you've started the trial, take the following steps:
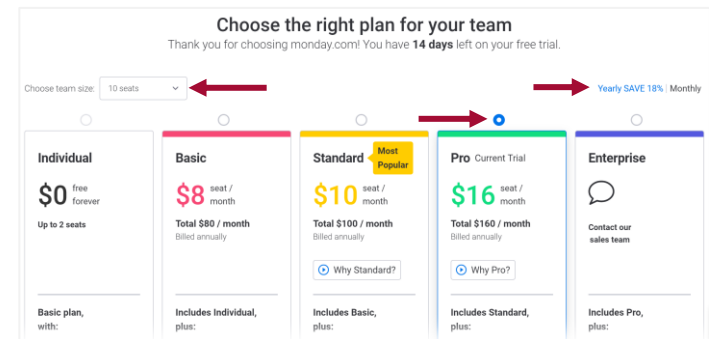
1. Click your account profile button on the bottom left side of Monday.com.

2. Go to: Admin -> Billing -> Upgrade Now

3. Select "Yearly Save 18%" in the top right corner and choose your team size from the dropdown list in the top left corner. We recommend to choose the Pro Plan.
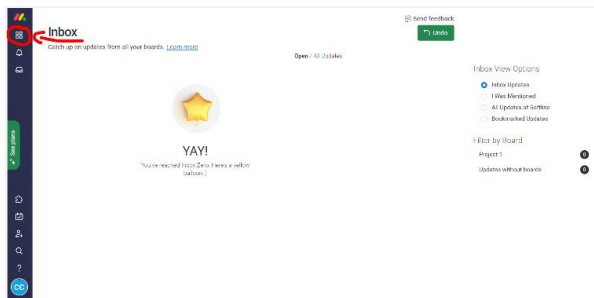

4. Provide your payment details and select Submit Purchase.

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- How to install and use -

After creating the account and logging in you will arrive to the landing page of your account which is the Inbox.

On the top left of this page, you will see the workspace icon ⊞ click it and you will be able to define your first workspace.

You could think of workspaces as different departments or offices that don't need to interact with each other at the reporting level.

At this link you can learn more about **setting your account**, setting up your **project management space**, creating **your first project**, **assigning task owners**, creating **tasks**, **subtasks** and much more.

For more details, short videos about features and practical examples you can visit Monday.com's YouTube channel.

Don't know how to start thinking about the high-level view of your solution? Find out how to think out the best solution design using Monday.com by clicking here.

Look at how others succeeded using Monday.com at Monday.com's written Stories and video Stories on the YouTube channel.

If you wish, you can import templates and edit them according to your need. Useful resources in this aspect can be found here.

We also offer on-demand trainings and consultancy that enables you and your team to get the most out of Monday.com - all of this at affordable prices.

For personalized consultation and support reach out to Softline's Cloud Development and Sales team at easterneurope@softline.com!