Elevating
monday.com
with Upscale apps:
the ultimate guide

Contents

WE CRAFT APPS TO ELEVATE YOUR WORKDAY

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Introduction

Optimising apps to make monday.com work better for you

By now, monday.com needs no introduction—it's the world's ultimate Work Operating System! Since launching over a decade ago, monday.com has flourished, and grown to become an essential platform for teams and businesses worldwide, helping them manage projects, tasks and workflows with ease.

Whether you're part of a small startup or a global enterprise, monday.com offers the flexibility to adapt to your unique needs. Its intuitive interface and customisable features empower teams to streamline processes, reduce bottlenecks, and maintain transparency across all projects.
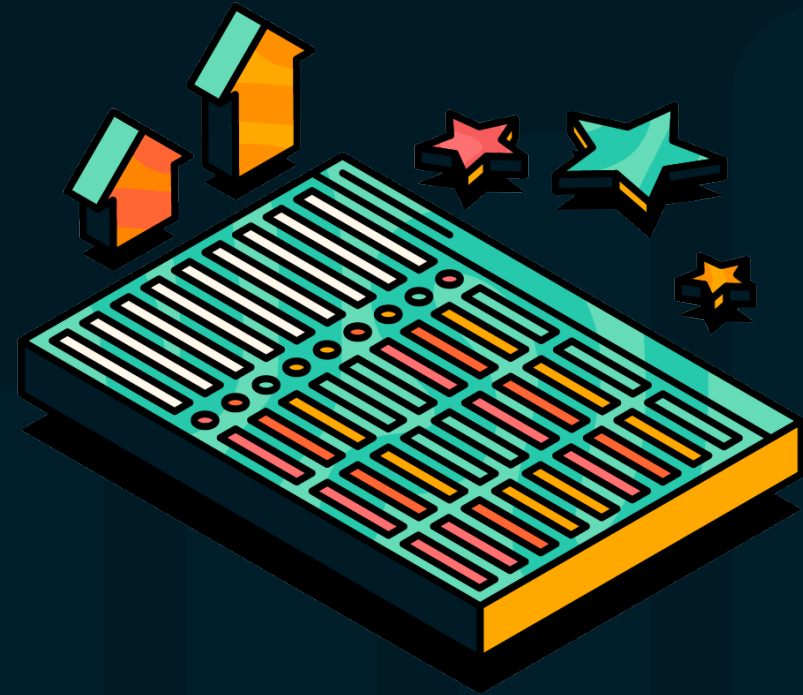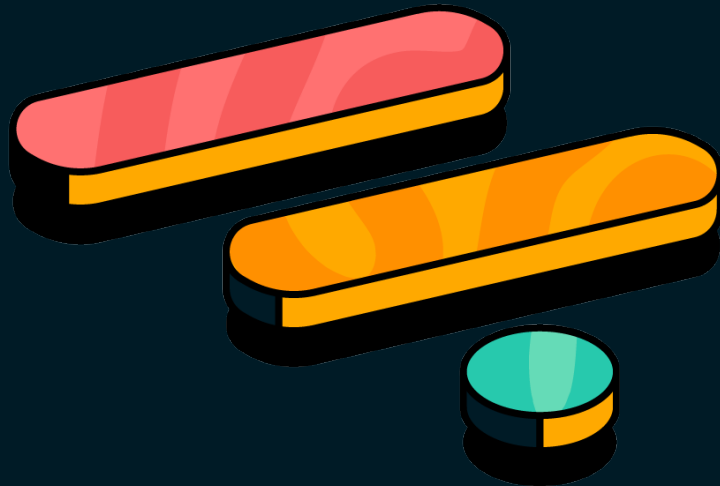
What truly separates monday.com from the pack?

The extensive library of apps and integrations available to allow you to take the platform to the next level, and customise the tool to fit your specific requirements.

In this guide we highlight our must-have apps, each crafted to elevate your workflows, strengthen team collaboration, and ensure that you get the most out of your monday.com experience.

We'll also explore practical use cases and examine why each app should become an essential part of your monday.com toolkit.

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Apps for monday.com

What is a monday.com app?

Before we get into the nitty-gritty, let's start with the basics. A monday.com app is a third-party integration or feature that you can add to your workspace. These apps extend the functionality of monday.com and streamline your work processes.

Whether you're looking to automate tasks, manage your workflows or analyse data—whatever your need, there's likely an app for it.

Why use monday.com apps?

Imagine yourself as an artist. You have a blank canvas. It's time to start adding some colour to create a beautiful painting and bring your art to life.

monday.com is your canvas, the apps are the paint and the colour.

Each app is like a unique brushstroke, allowing you to craft intricate designs and vibrant hues that reflect your vision.

By introducing monday.com apps into your workflows, and experimenting with different combinations, you're giving you and your team the freedom to:
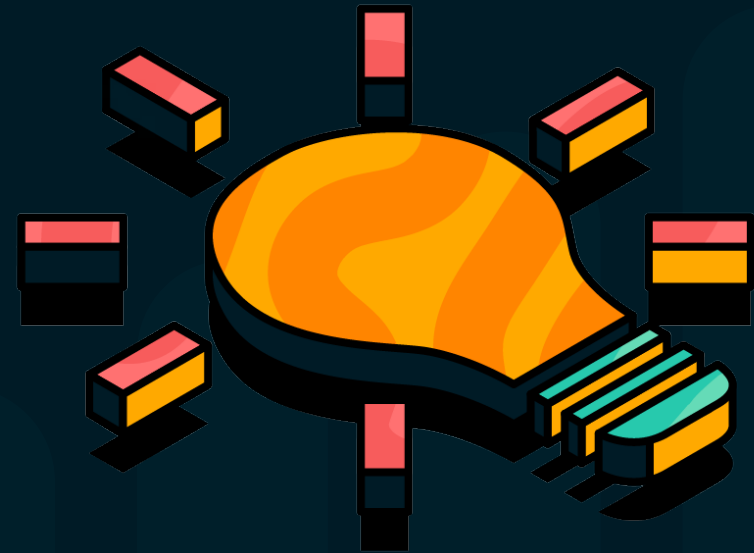
Enhance productivity: by automating regular or recurring tasks, saving you time and reducing the risk of missing important deliverables and milestones.

Nurture collaboration: by providing everyone in your workspace with a visual overview of ongoing projects and tasks.

Customise: your monday.com workspaces to meet your specific needs, tailored to suit your team's workflows.

Gain valuable insights: by getting a complete picture of your data, ensuring you have all the information you need when making important decisions.

But with so many apps to choose from, it can be difficult to know where to get started.

That's why we are bringing you three essential monday.com apps (plus one bonus app for you Slack users out there) to elevate your project management. Let's explore each one in more detail.

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Recurring Tasks
for monday.com
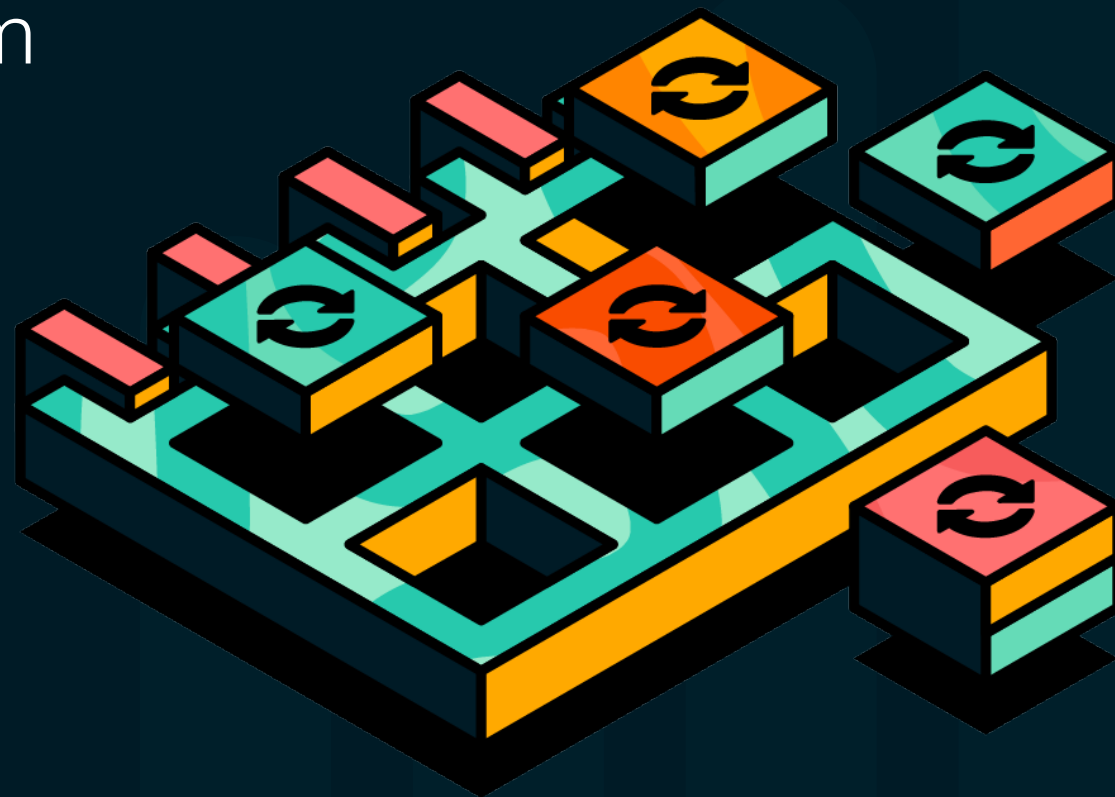
What is the Recurring Tasks for monday.com app?

Recognised by monday.com as one of the 7 best apps, and winner of 'Most Installed App', Recurring Tasks allows you to create any number of recurring items all at once. Accurately reflect repeating work in your monday.com boards, kanban, calendars, timelines, and dashboards in a single step, rather than having to add recurrences manually.

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Recurring Tasks
for monday.com

Why use the Recurring Tasks for monday.com app?

Having to repeatedly recreate recurring tasks from scratch can have you feeling like you're stuck in a loop. With Recurring Tasks for monday.com, you'll:

Save time planning your tasks and never miss anything important again. Easily automate and schedule the creation of regular, repeated or recurring tasks in your monday.com boards in a single step.

Get a clearer picture of your repetitive tasks by accurately reflecting recurring tasks in your monday.com workspace. With enhanced visibility on your future tasks, you'll be able to plan and allocate resources more effectively.
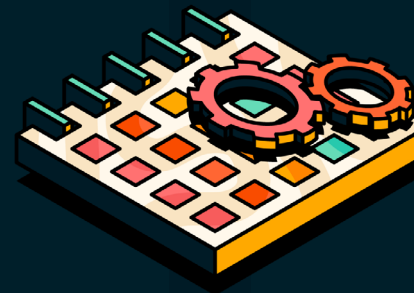
Stay in control by selecting customisable end dates, working days and number of repetitions for your recurring tasks, thereby eliminating the need for workarounds or having to do so manually.

Install the Recurring Tasks for monday.com app

Recurring Tasks has been a game-changer for our team's workflow in monday.com. It makes scheduling and tracking routine tasks, meetings and reports easy, ensuring we stay organised and nothing gets overlooked.

**Angela Leon,
Product Manager**

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Recurring Tasks
for monday.com

Recurring Tasks for monday.com in action: practical use case

Suppose you're a Project Manager overseeing a large, complex project for your organisation.

In that case, it's critical that you're able to effectively communicate with your project team and monitor progress, so that you can keep key stakeholders informed.

To achieve this, you've arranged weekly stand-up meetings with your team.

With Recurring Tasks for monday.com, you can create your weekly stand-ups as regularly recurring tasks, to occur once a week at your chosen time.

Within each recurring task, you can use the subitems feature to create subtasks for each meeting (for example, to outline specific agenda items to be addressed).

You can also use the 'Updates Section' feature for each individual recurring task to write up meeting summaries, ensuring progress is accurately tracked and easily shareable with the relevant stakeholders.

Weekly Stand-ups

Updates   Files   Activity Log   Recurring Tasks

Recurring Tasks   Settings

Items will repeat every week, on Tuesday, until 12 February 2025

Start date
2024-09-20

Repeats every
1   Week

Sun   Mon   Tue   Wed   Thu   Fri   Sat

When would you like to display your tasks?
Display all your tasks at once now
On the due date   1 day before

Ends
On   2025-02-12
After   1   repetition(s)

Save
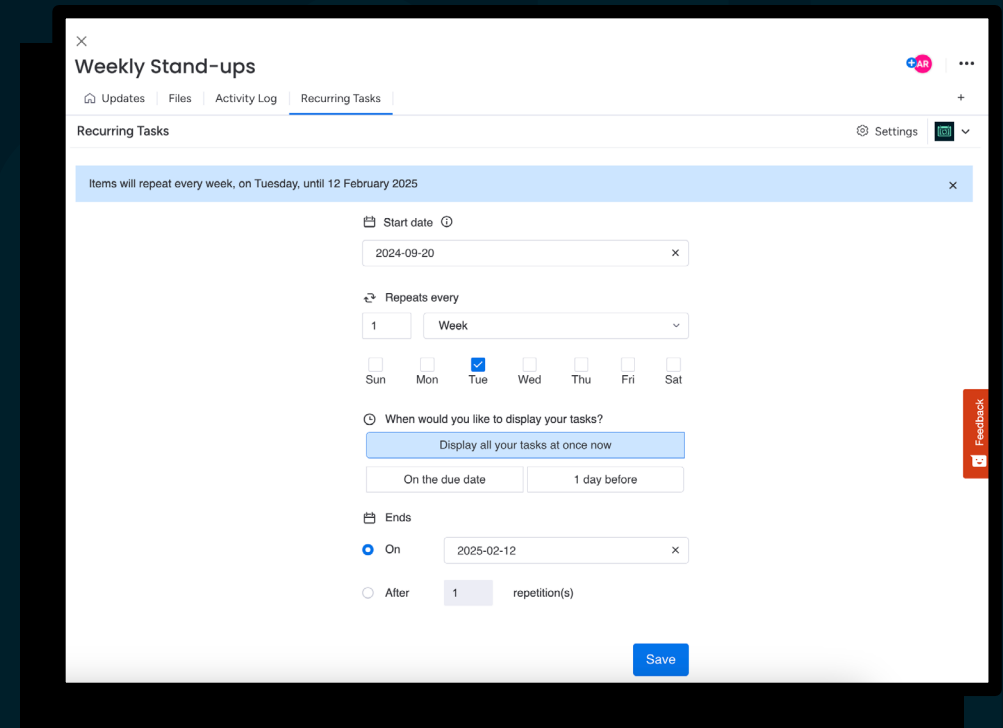
Thanks to Recurring Tasks for monday.com, you can manage regular tasks and activities more efficiently, enhance communication across your entire team, and keep everyone aligned on progress towards your project goals.

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Unlimited Subitems
for monday.com
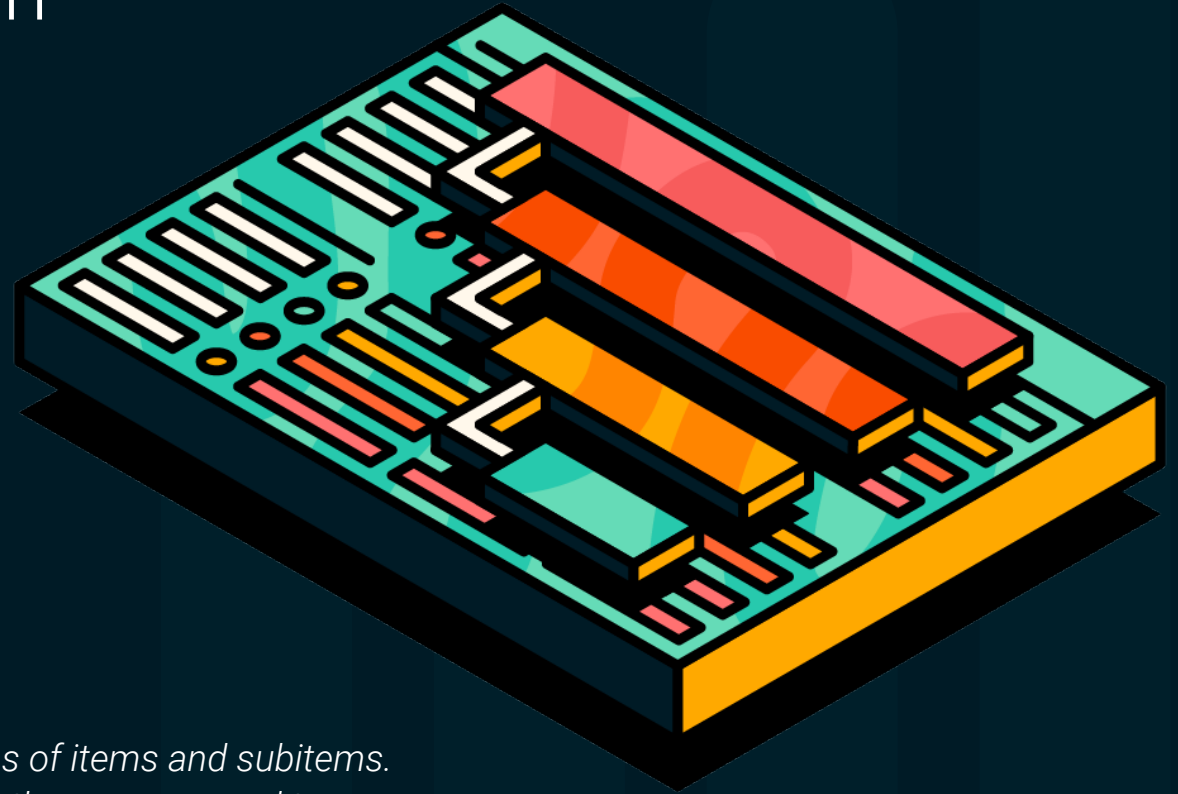
What is the Unlimited Subitems for monday.com app?

monday.com lets you organise your boards into groups of items and subitems. However, to track and manage your work more efficiently, you may need to further break down subitems to reflect your project tasks more accurately.

The Unlimited Subitems for monday.com app allows you to extend the native subitems hierarchy by adding additional levels of child subitems. How many levels of subitems can you create? The answer's in the name—unlimited!

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Unlimited Subitems
for monday.com

## Why use the Unlimited Subitems for monday.com app?

When working on challenging projects with intricate workflows, you need to be able to break down large and complex tasks into smaller, more manageable subtasks to help you organise your work, and accurately reflect key deliverables and milestones. By introducing Unlimited Subitems for monday.com into your project management workflows, you can:
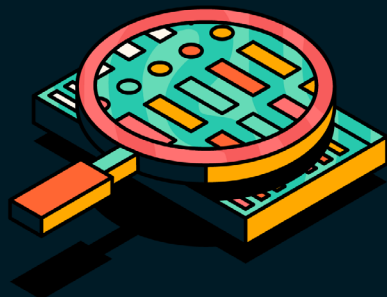
Reflect and track your work by breaking down your tasks into as many levels as you need. Get a clear and simple overview of your extended board hierarchy to quickly identify specific problem areas, understand multiple subitem deliverables and determine who is working on what.
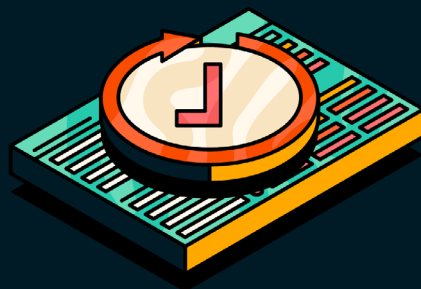
Capture and track all the information you need by creating individual subitems for each task, eliminating the need for workarounds to reflect multiple subitem deliverables, milestones and deadlines. Keep all stakeholders up to date at all times, across every stage of your project.
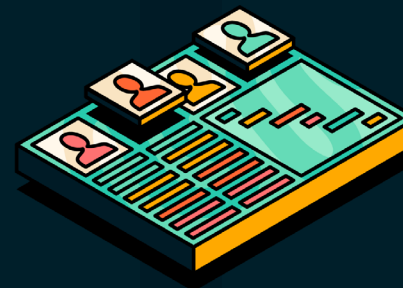
Manage your projects more efficiently from a single subtask, by breaking down the status, timing, and team members working on each individual project component into child subitems. This allows you to track progress at a granular level, ensuring no detail is overlooked.

Install the Unlimited Subitems for monday.com app

> *Unlimited Subitems is the go-to tool for managing content marketing campaigns in monday.com. I can organise everything from blog posts, customer emails and social media schedules into detailed tasks, tracking each step from ideation to publication, ensuring cohesive, timely execution.*

**Charlie Courtney,
Senior Content Marketing Manager**

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Unlimited Subitems
for monday.com

Unlimited Subitems for monday.com in action: practical use case

As a Marketing Manager using monday.com to manage your campaigns, it's essential that crucial information including tasks, goals, resources and deliverables, are reflected in your boards. This ensures your stakeholders have a complete picture of the whole project.

Particularly complex campaigns often involve multiple tasks and subtasks, making managing and visualising the workflow challenging.

For example, in monday.com, you could have 'Marketing Campaign' as the parent item, and 'Social Media Launch' as the subitem.

However, as we all know, that doesn't quite tell the whole story.

Your 'Social Media Launch' includes promotion across Facebook, X (formerly Twitter) and LinkedIn. What about paid and sponsored ads? How do you reflect those using the native subitems feature?

Well, you could have a separate subitem for each platform. However, your board now starts to look cluttered and overloaded with information that is only relevant to a few stakeholders.

With Unlimited Subitems for monday.com, you can extend the native subitem hierarchy to add additional child subitems underneath the parent 'Social Media' subitem, creating a more hierarchical and structured workflow that more accurately represents your tasks.
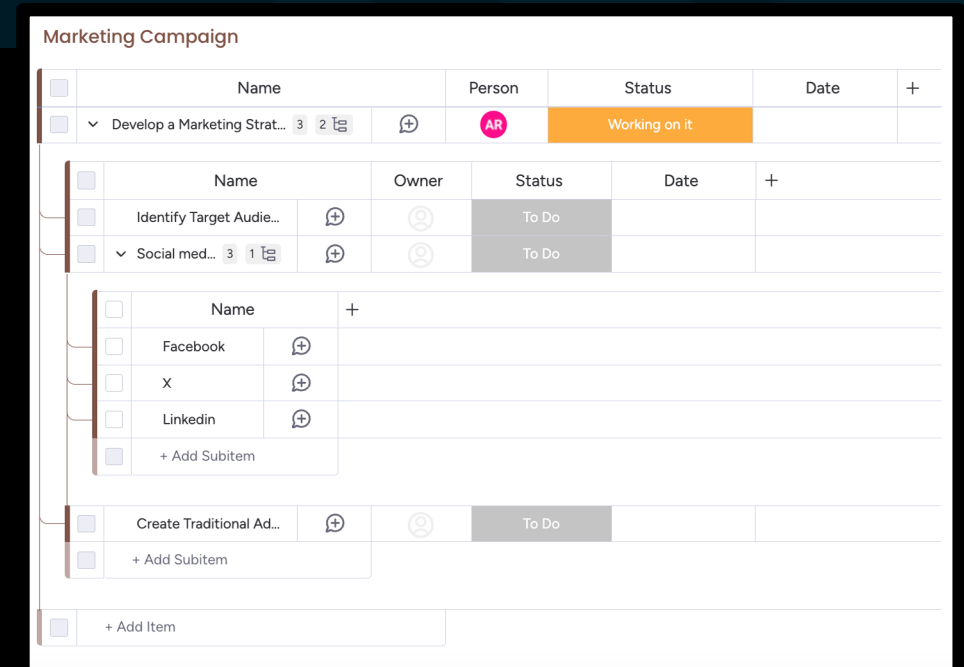
If you're looking to provide a deeper, more granular level of detail to your work in monday.com, give Unlimited Subitems a try!

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Smart Forms
for monday.com
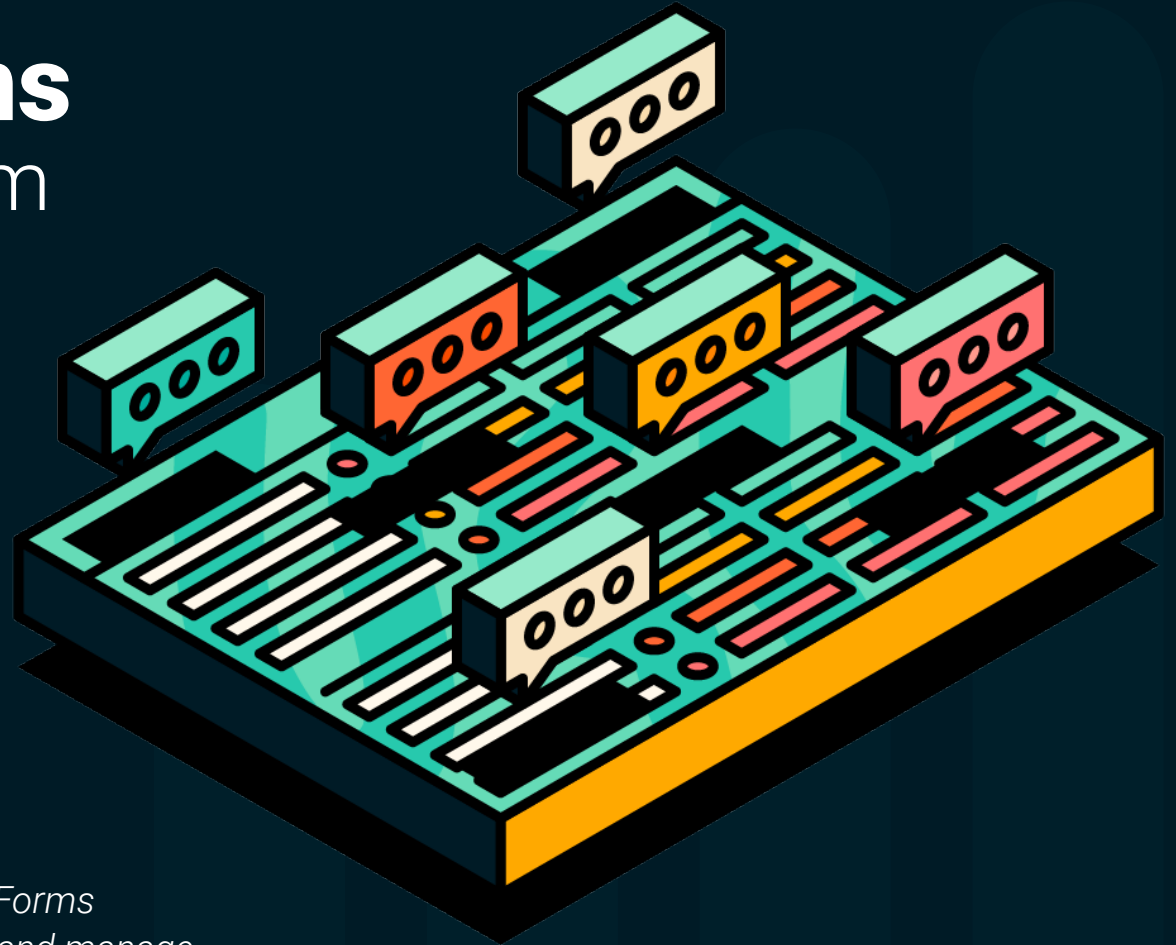
What is the Smart Forms for monday.com app?

Harnessing the power of AI, the award-winning Smart Forms for monday.com empowers you to effortlessly extract and manage your customer data from forms, surveys and questionnaires.

The Smart Forms for monday.com app streamlines your insight collection process, saving valuable time by automating the analysis and categorisation of qualitative information, and communicating directly with your respondents.

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Smart Forms
for monday.com

Why use the Smart Forms for monday.com app?

By adding the Smart Forms for monday.com app to your workspace, you can:

Save time by automating the analysis and categorisation of form replies. You can structure your customer insights in a way that works for you, by automatically generating tags for your data based on the answers provided by your form respondents. You'll see exactly what you need to see, quickly and easily.

Visualise your data by extracting actionable insights and consolidating your important information into dedicated boards. Smart Forms makes it quicker and easier than ever before for all team members to access comprehensive data summaries and valuable customer insights from form responses.
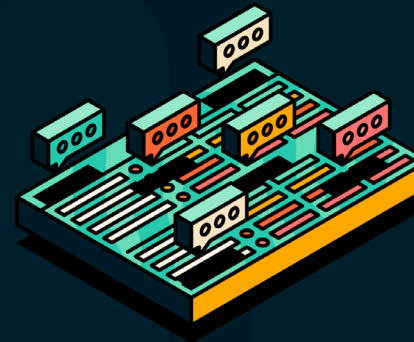
Nurture personalised communication with your customers by generating personalised responses based on the individual answers you've received from your form respondents. Engage in and nurture bespoke conversations with your respondents in seconds, saving you time and enhancing ongoing communication with your customers.

Smart Forms has totally changed the way I manage and analyse my customer data from form responses in monday.com, saving me hours of manual work. Now, instead of getting bogged down in data, I can spend more time communicating with our customers and finding new ways to enhance their experience.

Amalia Rubino, Product Marketing Manager

Install the Smart Forms for monday.com app

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Smart Forms
for monday.com

Smart Forms for monday.com in action: practical use case

For event organisers, it can often feel like there are a million and one things involved in hosting a successful event. Whether it's for smaller, intimate meet-ups or large-scale conferences and seminars—there is a ton of work that goes into ensuring delegates are treated to a personalised, interactive experience—and leave feeling energised and engaged!

As an event planner, you want to know your hard work has paid off but also, what could be done better to create an even more memorable experience for your attendees at future events. This is where gathering feedback from your attendees becomes crucial.

By harnessing insights from your attendees' experiences, you can refine

your planning processes and workflows with the goal of making each future event more exceptional than the last. But gathering that initial data, in the form of questionnaires and surveys, can be incredibly time-consuming.

Common pain points include:

1. Data overload: particularly for large events, the sheer volume of responses can be overwhelming, making it challenging to extract actionable insights. ❯
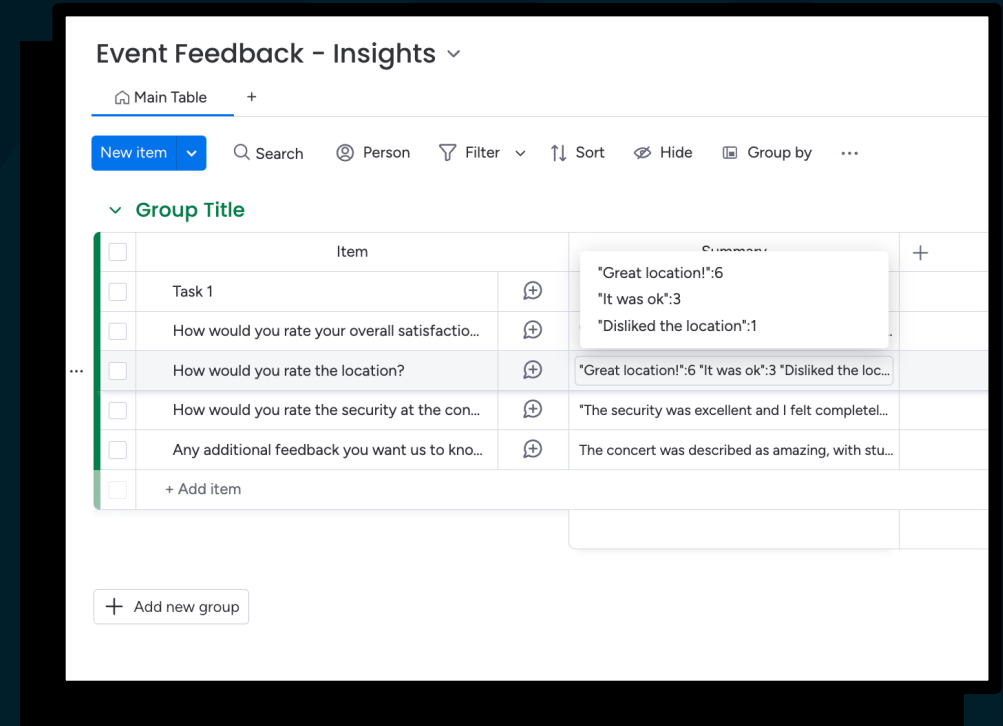
By harnessing insights from your attendees' experiences, you can refine your planning processes and workflows for future events.

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Smart Forms
for monday.com

2. Prioritising and categorising feedback: event organisers may struggle to prioritise which feedback to address first. It becomes especially complicated to categorise feedback when there are conflicting opinions or multiple areas for improvement, particularly for open-ended responses which, while valuable, can be time-consuming to analyse.

3. Manual analysis: reviewing and analysing feedback manually isn't only time-consuming, but also leaves room for human error, misinterpretation and missed information.
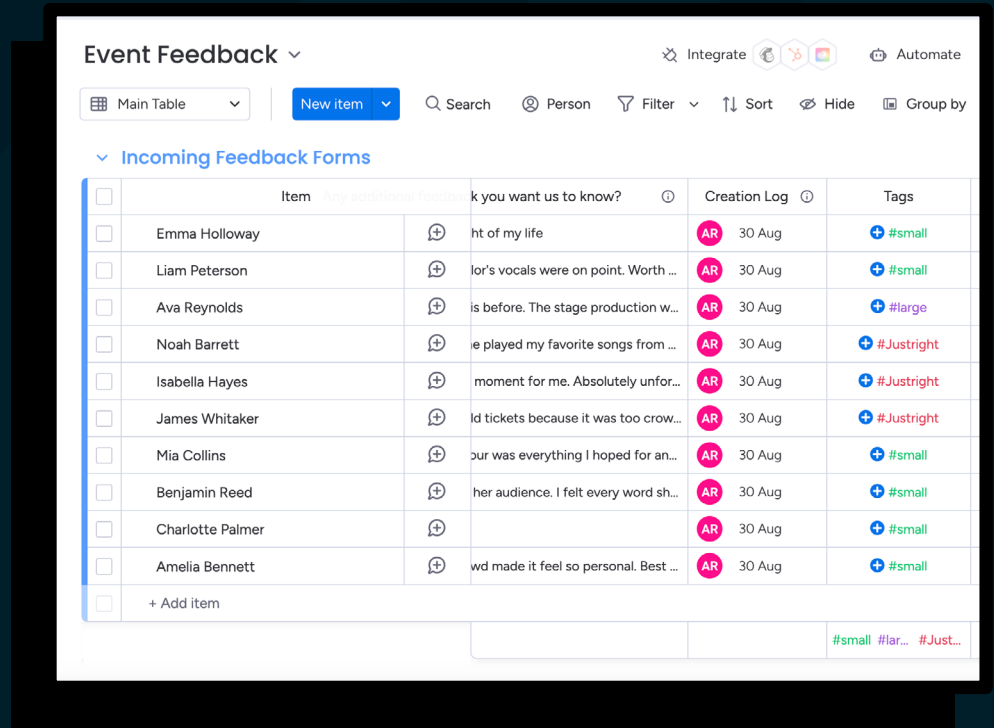
That's where the Smart Forms for monday.com app comes in, to address these challenges directly.

Event planners and organisers can save time by automating the analysis and categorisation of form responses, allowing you to focus on the most important action items.

Using the 'Categorise replies' feature enables you to create dedicated tags in automatically-generated columns based on the answers provided.

For example, you have several responses to the question: 'Did the event venue's size meet your needs?'.

Smart Forms for monday.com will automatically generate and assign tags to each item to indicate whether the respondent felt the event venue was too small, too large, or just right.

Event Feedback

	Item		Creation Log	Tags
Emma Holloway		ht of my life	AR 30 Aug	#small
Liam Peterson		lor's vocals were on point. Worth ...	AR 30 Aug	#small
Ava Reynolds		is before. The stage production w...	AR 30 Aug	#large
Noah Barrett		e played my favorite songs from ...	AR 30 Aug	#Justright
Isabella Hayes		moment for me. Absolutely unfor...	AR 30 Aug	#Justright
James Whitaker		ld tickets because it was too crow...	AR 30 Aug	#Justright
Mia Collins		our was everything I hoped for an...	AR 30 Aug	#small
Benjamin Reed		her audience. I felt every word sh...	AR 30 Aug	#small
Charlotte Palmer			AR 30 Aug	#small
Amelia Bennett		wd made it feel so personal. Best ...	AR 30 Aug	#small
+ Add item				
				#small #lar... #Just...

With the Smart Forms for monday.com app, you'll get a clearer picture of your data, meaning you can prioritise feedback and address areas that matter most to your respondents.

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Integrate Plus
for monday.com and Slack

If you're using both monday.com and Slack to collaborate with your colleagues, manage projects and update ongoing tasks—then we've got the ultimate app for you.

Meet Integrate Plus for monday.com and Slack.

What is the Integrate Plus for monday.com and Slack app?

The Integrate Plus for monday.com and Slack app empowers you and your teams to connect their monday.com and Slack workflows seamlessly, reducing the need to constantly switch between the two, and eliminating the need to manually make the same updates in two separate platforms.
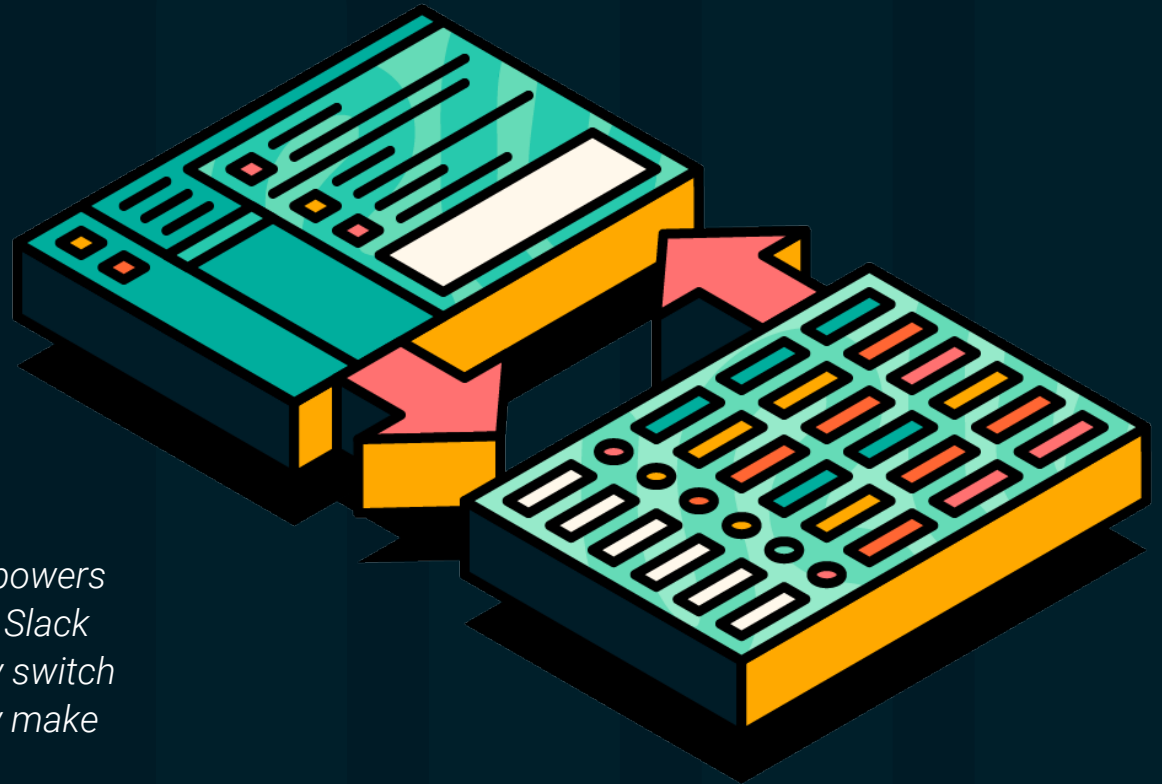
WE CRAFT APPS TO ELEVATE YOUR WORKDAY

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Integrate Plus
for monday.com and Slack

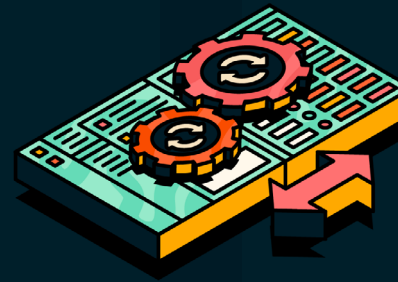## Why use the Integrate Plus for monday.com and Slack app?

Switching between monday.com and Slack throughout the day can be a huge drain on your productivity. In fact, studies have shown that repeatedly switching between tools like this can cost employees up to five working weeks per year. Eliminate this productivity drain with Integrate Plus for monday.com and Slack to:

Save time by monitoring and updating your monday.com boards directly from Slack, reducing the need to constantly switch between platforms and helping you stay focused on what matters.
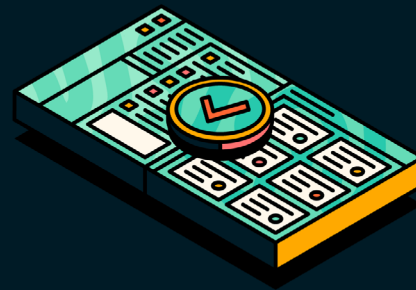
Boost productivity by integrating monday.com with Slack, allowing your tools to work together more harmoniously and minimising distractions from context-switching.

Gain control by easily updating tasks, assigning new ones, changing statuses, and adding subtasks from within Slack—no need to leave where you're already collaborating with your team.

Install the Integrate Plus for monday.com and Slack app

> *Integrate Plus for monday.com and Slack has made managing my UX design tasks so much easier. Now, I can update tasks, track feedback, and monitor timelines in monday.com right from Slack, keeping my focus on what really matters—understanding our users!*
>
> **Vali Gurgu,
> Lead UX Designer**

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Integrate Plus
for monday.com and Slack

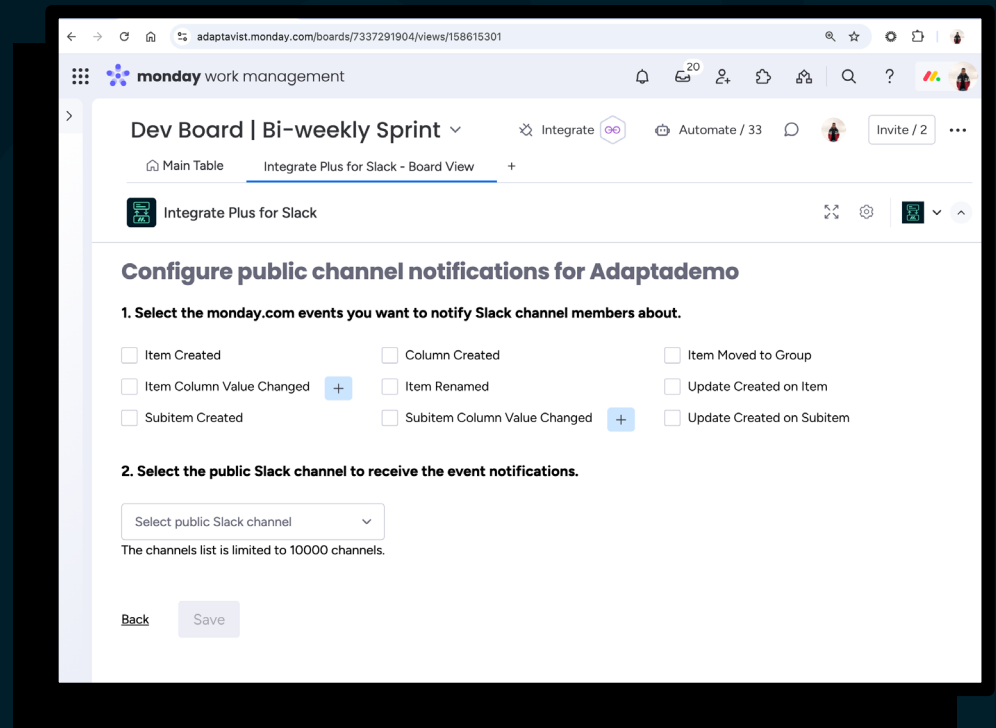# Integrate Plus for monday.com and Slack in action: practical use case

As a software developer, you're probably juggling a multitude of tasks on a daily basis.

The demands of staying on top of projects, tracking progress, and ensuring smooth team communication can be overwhelming. While monday.com excels at helping you manage tasks efficiently, many developers turn to Slack for quick and seamless team conversations. However, toggling back and forth between these two essential tools can present a significant challenge.

When you're tracking your tasks in monday.com while also engaging in team discussions on Slack, you find yourself constantly switching between the two platforms. This repetitive shift not only eats away at your precious time, but disrupts your workflow and concentration.

Consider this: as you transition between monday.com and Slack, what often gets lost in the shuffle? The answer is clear—communication gaps and the potential for errors. Moreover, this frequent tool-switching can negatively impact your productivity, with studies showing that context and task switching can decrease your productivity by 40%. ❯

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adaptavist.monday.com/boards/7337291904/views/158615301

monday work management

Dev Board | Bi-weekly Sprint ⌄   ✦ Integrate ∞   ⊙ Automate / 33   💬   Invite / 2   •••

⌂ Main Table   Integrate Plus for Slack - Board View   +

▦ Integrate Plus for Slack

Configure public channel notifications for Adaptademo

1. Select the monday.com events you want to notify Slack channel members about.

☐ Item Created   ☐ Column Created   ☐ Item Moved to Group

☐ Item Column Value Changed ＋   ☐ Item Renamed   ☐ Update Created on Item

☐ Subitem Created   ☐ Subitem Column Value Changed ＋   ☐ Update Created on Subitem

2. Select the public Slack channel to receive the event notifications.

Select public Slack channel ⌄

The channels list is limited to 10000 channels.

Back   Save

> *Employees lose around five working weeks per year due to context-switching, accounting for 9% of their total work time.*
>
> **Harvard Business Review**

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Integrate Plus
for monday.com and Slack

The good news is, there's a simple solution to this challenge: the Integrate Plus for monday.com and Slack app.

By seamlessly connecting monday.com and Slack, you can significantly reduce the time spent navigating between the two, ultimately enabling you to achieve more in less time. Here's how:

If you're using monday.com to manage support requests, you can use the Integrate Plus app to track, action, and collaborate on monday.com from Slack. By keeping teams focused in Slack, workflow creators can request only the details that matter to them in monday.com items. This means users can quickly create monday.com tasks from Slack and continue with their work.

As a result, Slack becomes your control room for creating and managing monday.com tasks, including:

Effortless support requests: create support requests in monday.com with a simple emoji trigger in Slack.

Streamlined status updates: update the status of an item using automated or behavior-triggered events, ensuring everyone stays informed.

Monitor progress: comment on support requests created in monday.com directly from Slack.

Enhanced task scheduling: create custom workflows in Slack prompting you to take action on repetitive tasks.
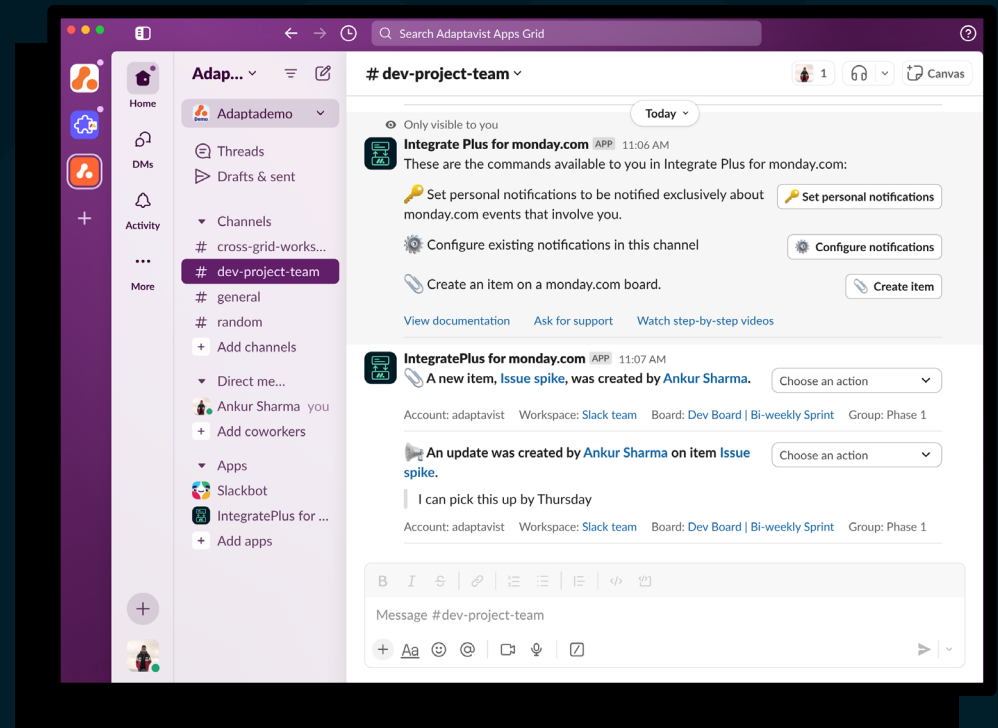
When it comes to efficiently managing and tracking your support requests, it's time to work smarter, not harder, with the Integrate Plus for monday.com and Slack app.

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About Upscale

Crafting apps for everyday work

At Upscale, we craft apps to elevate your monday.com experience, helping you unlock its full potential and reach your goals with ease, whatever your role.

Our tailor-made apps for monday.com are designed to solve your daily challenges, simplify your workflows and make every day smoother—all within the platform you already know and love.

Why choose us? It's simple. With the support and backing of one of the most respected companies in digital transformation, The Adaptavist Group, our award-winning apps help thousands of happy customers achieve more every day.

Help shape the Upscale apps of tomorrow

Tell us the products you want to see! Share your story with us, what do you love about our apps? What can we do better? And how can we help you achieve your goals in the future?

Share your story with us

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About The Adaptavist Group

Access the expert services of The Adaptavist Group: Advanced Delivery Partner of monday.com

Did you know that, as a part of The Adaptavist Group, we can provide you with exclusive access to our expert monday.com Business Consultancy services?

Our friends at Adaptavist are always on hand to help you harness monday.com's full potential, enabling you to successfully reach and exceed your project management goals and objectives, every time.

Adaptavist is proud to be an Advanced Delivery Partner of monday.com, and we're here to make your experience even better by unlocking the platform's full potential. At Adaptavist, we specialise in making your monday.com experience not only efficient, but enjoyable!

We work closely with our clients to optimise workflows, develop custom solutions, and eliminate silos, ensuring seamless cross-team collaboration.

Here's a brief overview of what we offer:

Accelerated monday.com launch: we relieve the stress of roll-out by building tailored solutions to match your specific requirements.

Optimised workflows: our ongoing support helps streamline your business processes.

Custom development solutions: we develop integrations that allow you more time to get tasks into that 'Done' column.

Trusted licensing partners: we handle licensing and portfolio management, taking the administrative burden off your shoulders.

Visit the resources hub on the Adaptavist website to find out more about the services we offer, as well as all the latest monday.com news, tools and resources.

Get in touch through our hub to speak to us about optimising your monday.com workflows to the max!

Finally, as our friends at monday.com like to say—'**Done**'.

Visit our hub

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Ready to unlock the true value of your favourite everyday work platforms?

Visit: www.upscale.tech, and start elevating your work day today!

Launched in 2024 as part of The Adaptavist Group, Upscale is on a mission to elevate the value and experience of today's leading work platforms. With a suite of award-winning apps for Atlassian, monday.com, and Slack, Upscale empowers thousands of users to simplify tasks, overcome challenges, and achieve their goals with ease—transforming every workday into a smoother, easier, and more enjoyable experience.

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PART OF

The Adaptavist Group