

5. Automate your workflows

Automations - Principle

One of the main strength of monday.com is its ability to automate your workflows, by minimizing the amount of manual labor needed to conduct your project.

Automations work on a board basis, and by default, none are active on your different boards. To activate automations you need to :

- Click on the "Automation" button



- Go on the "Automation center" tab to add a new automation
- Select the automation you want to set up
- Complete the sentence with the information you want

Once your automation is set up, it will apply to every task on the board.

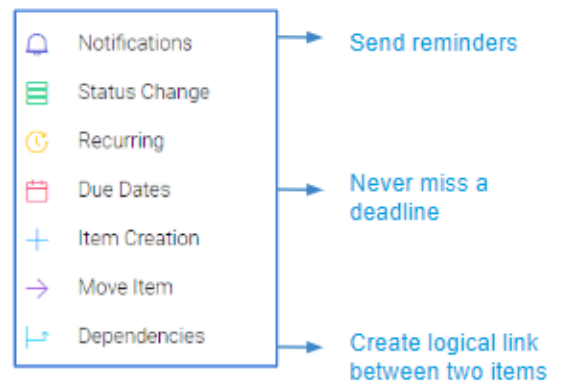


Useful automations

Automations are here to personalize one's workflow : do not hesitate to explore the different options available to find what fits your project best.

However, some automations can be useful for every project :

- **Send automatic notifications** : by default, monday.com won't send notifications before deadlines. To do that, you must create an automation indication when to send them. You can set up multiple notification automations depending on your needs.
- **Move task when a status change** : this kind of automation can be useful to archive task in another group or another board, and to keep your board clear.
- **Automatically create a new task** : useful when you need to keep track of repetitive tasks.
- **Warn manager when a task is overdue**
- ...



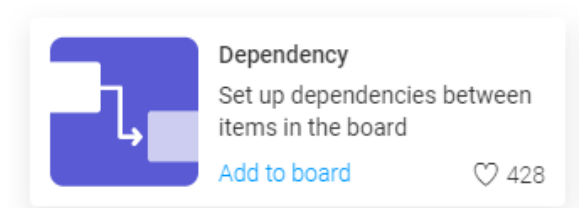
Predecessors - Dependencies

You can set up dependency links between task. The first thing you need to do is to add a "Dependency" column in your board.

By default, this column does nothing. You need to set it up :

- Click on the "Automation" button
- Select "Automation center"
- Select "Dependencies"
- Chose the type of dependency you want to set up for your column

Now, the column will apply the rule established in the automation section.





- Automations will only adapt data based on changes happening on the board, and won't automatically create dates. If no dates are entered for a specific task, nothing will happen.
- Dependencies won't appear on the Timeline view but still apply.