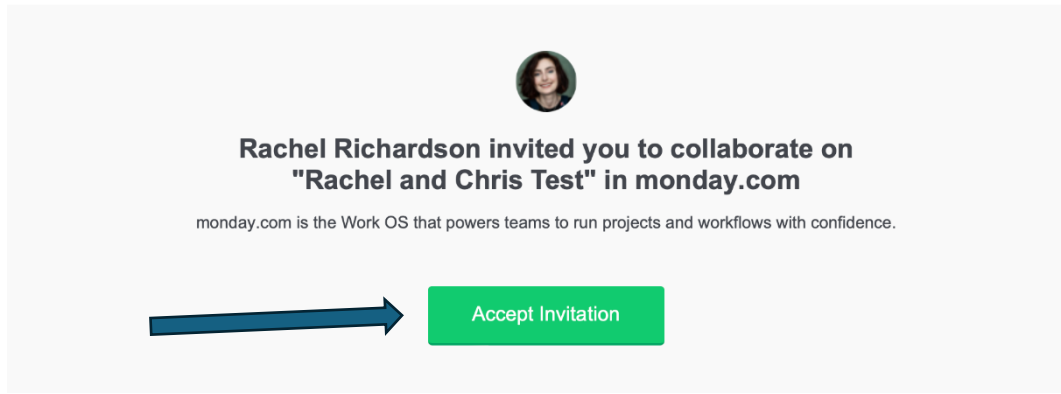


The Woods at Oakley Monday.com User Guide

You will receive an email invitation that looks like this:



Click 'Accept Invitation' and create a username and password:



Join Thewoodsatoakley's Account

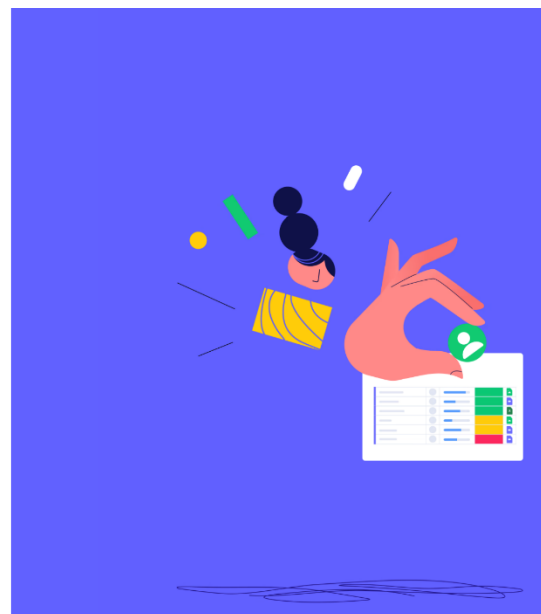
Complete your details

Full name

Password

By proceeding, you agree to the [Terms of Service](#) and [Privacy Policy](#)

Continue >



Don't worry too much about answering the below questions, they're not relevant! Feel free to click on the one that best describes you or just choose 'other':



What best describes your current role?

Business owner

Team leader

Team member

Freelancer

Director

C-Level

VP

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Continue >





What department are you in?

PMO

Product management

Construction

Design and Creative

Marketing

Education

Finance

Sales and CRM

Legal

Operations

HR and Recruiting

Nonprofits

IT

Software development

Other

< Back

Continue >





What are you planning to do with monday.com?
Help us tailor the best experience for you.

☐ Collaborate with my team

☐ Manage my own tasks

☐ Manage my team

☐ Track my team's work progress

☐ Create a project

☐ My manager asked me to join

☐ I'm considering monday.com for my team

☐ I don't know yet

☐ Other

< Back

Continue >



Click 'This is my first time using Monday.com':



Have you used monday.com before?

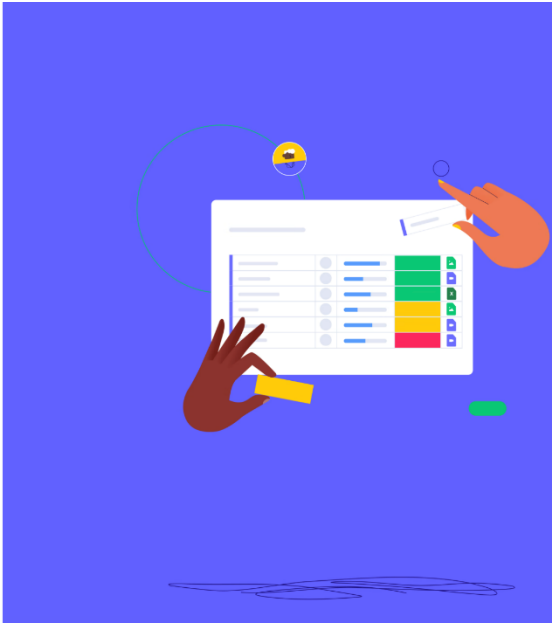
Let us know your experience so we can tailor your setup for the Thewoodsatoakley workspace

I've used monday.com before

This is my first time using monday.com

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The illustration shows a white rectangular dashboard floating on a solid blue background. The dashboard displays a typical Monday.com interface with a list of items on the left and a Kanban board with four columns (green, yellow, red, and blue) on the right. Two stylized hands are interacting with the dashboard: one hand is pointing at a task in the Kanban board, and the other is holding a yellow sticky note. There are also some small circular icons and a green pill-shaped button near the dashboard.

You don't have to upload a picture but you can if you like! Otherwise, click 'skip':



Upload a profile picture

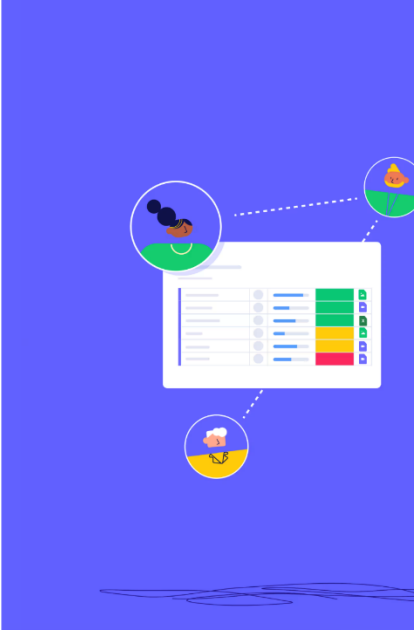
Pictures make it easier to collaborate.



Upload image

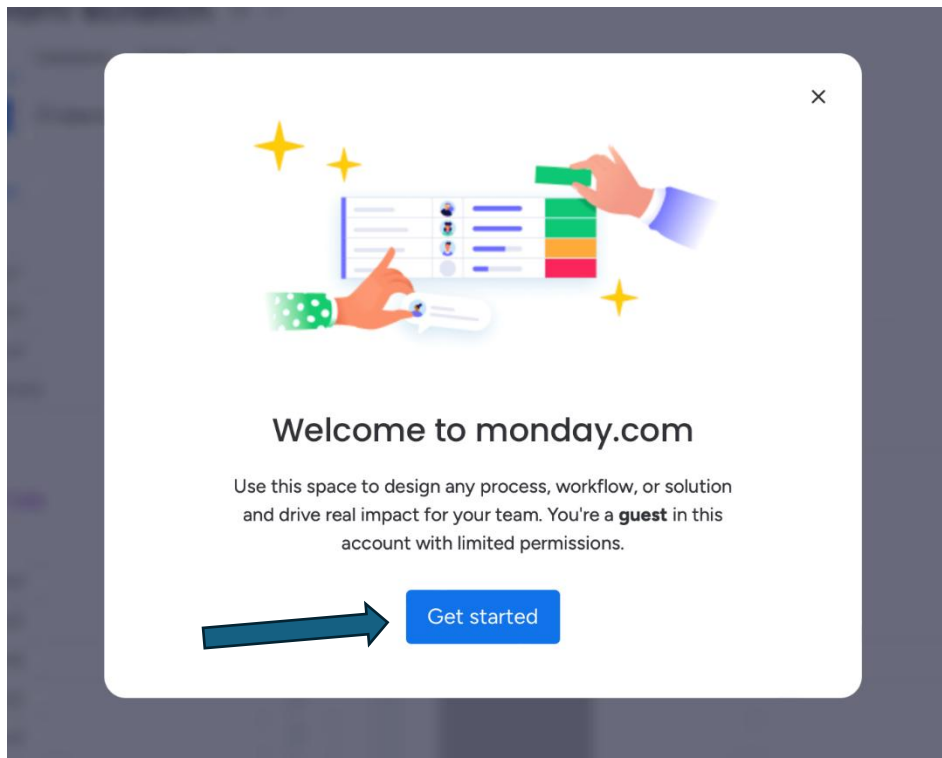
Skip

Done



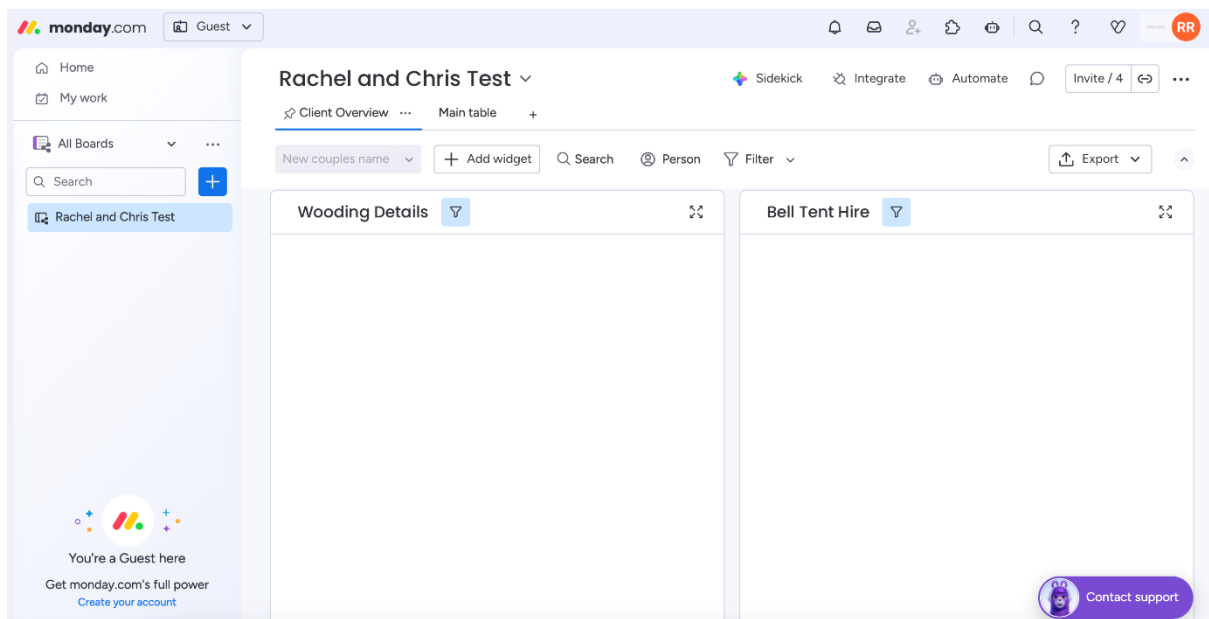
The illustration shows a white rectangular area on a solid blue background. Inside this area, there is a circular placeholder for a profile picture on the left. To the right of the placeholder is a blue button with an upload icon and the text 'Upload image'. Below the placeholder and button, there are two circular icons: one with a person's head and shoulders, and another with a person's head and shoulders. Dotted lines connect these icons to the profile picture placeholder. There is also a small green pill-shaped button near the bottom right of the white area.

Click 'get started':



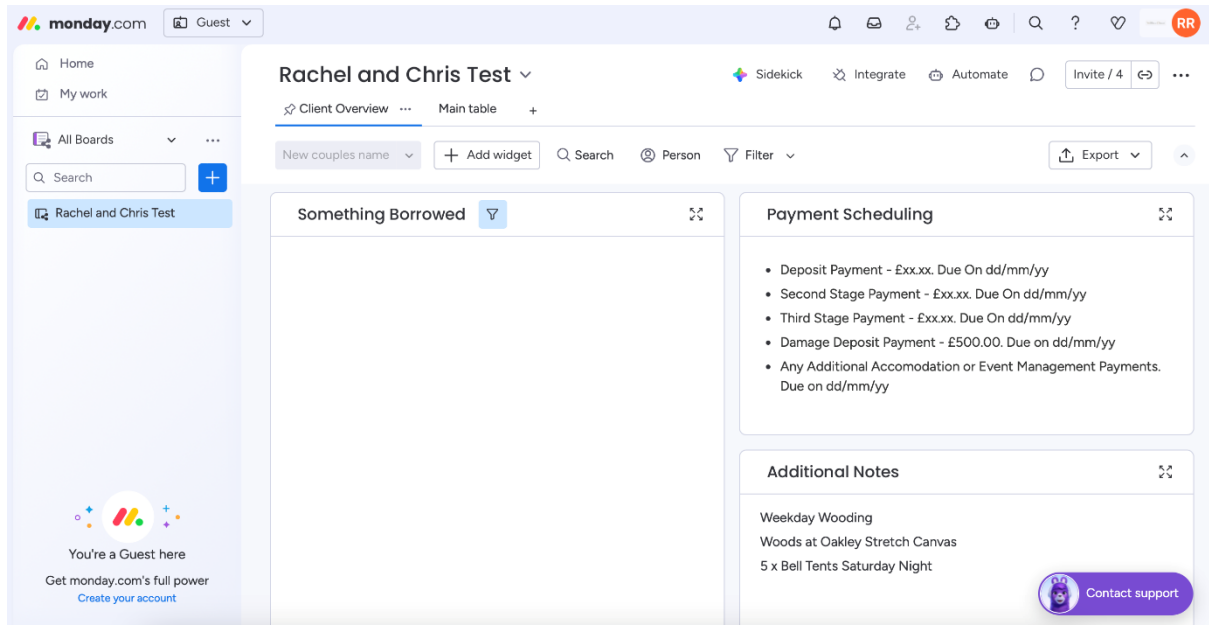
This is your Monday.com board!

Your names will appear at the top. You will see a 'Wooding Details' widget and 'Bell Tent Hire' widget. Don't worry about these – once you've completed your questionnaires, we add these to your board:

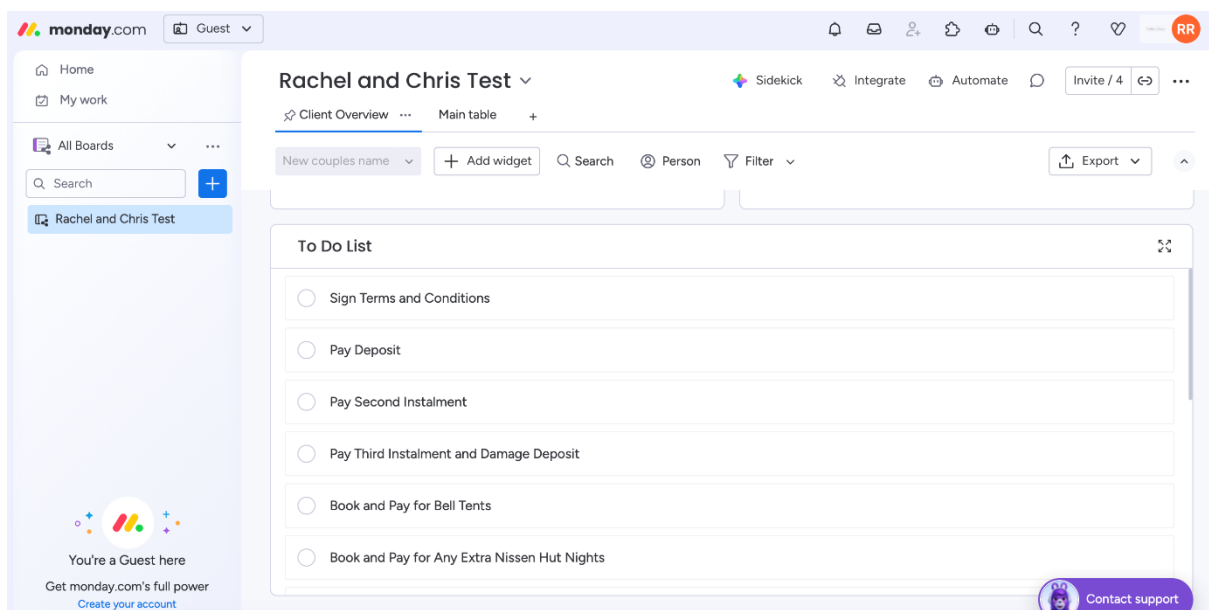


Scroll down and you'll see a 'Something Borrowed' widget, which is where your completed questionnaire will go (we will add this).

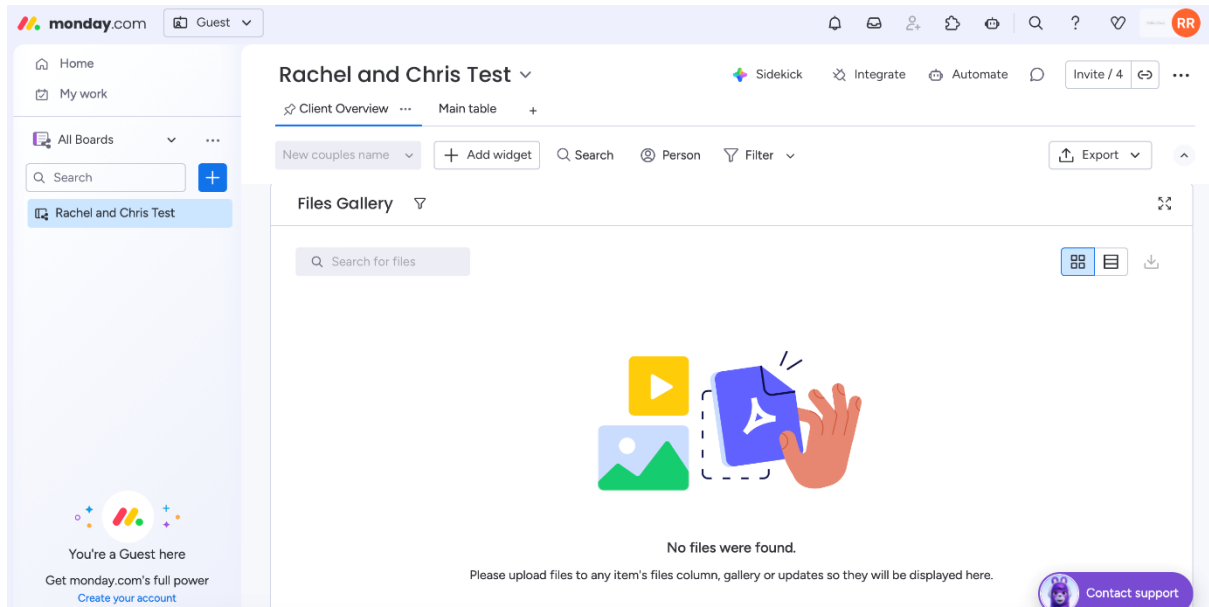
On the right you can see your payment schedule and below that there is 'Additional Notes'. We add in notes on your wedding here and you can too! Use it to share anything helpful for us to know:



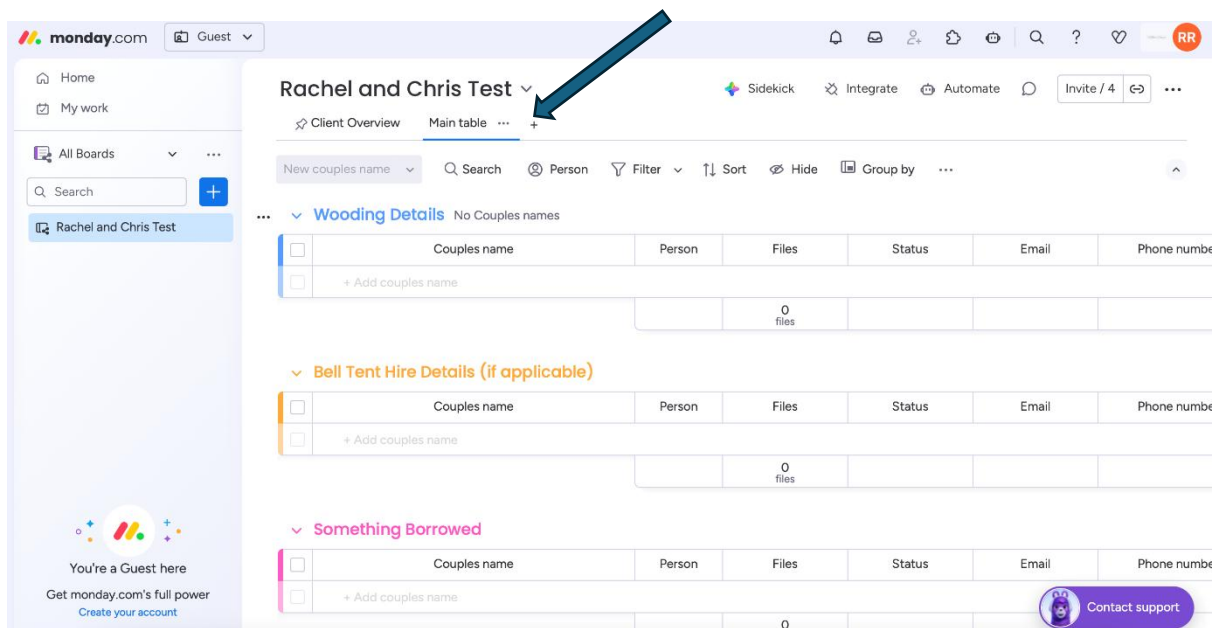
Scroll down again and you'll see your 'To Do List', which you can tick off as you complete:



Scroll down again and you'll see your 'Files Gallery'. This is where you can upload your documents for us to see, including your supplier's Public Liability Insurance certificates or your alcohol provider's TENS license (if they're selling alcohol):



To upload files to your 'Files Gallery', scroll up to the top and click 'Main Table':



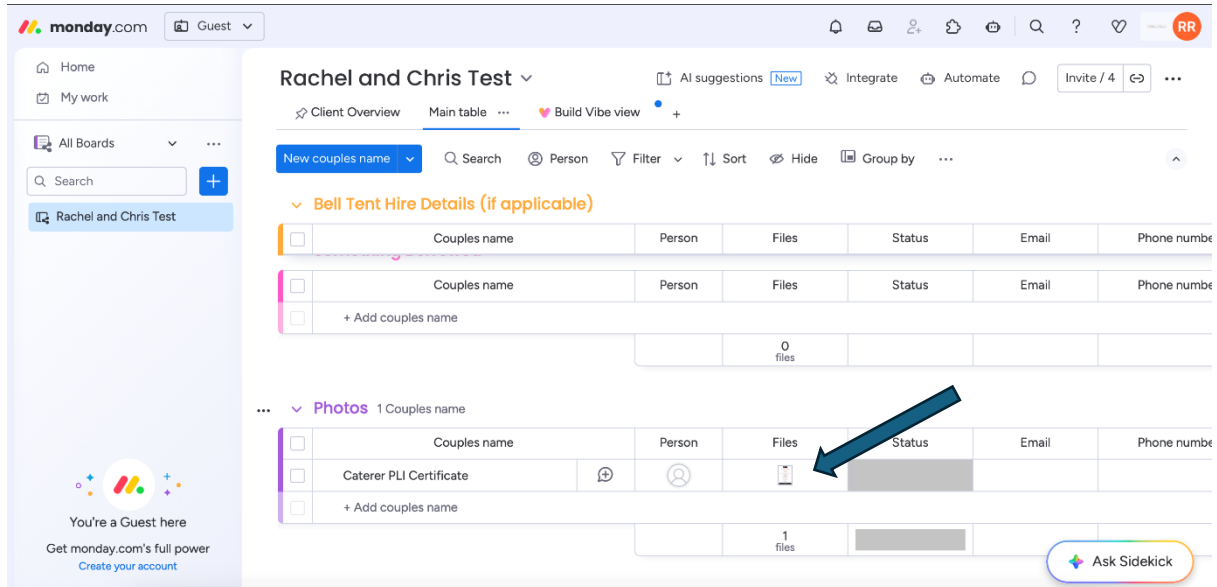
Scroll down to the purple 'Photos' row:

The screenshot shows the Monday.com interface for a board titled 'Rachel and Chris Test'. The left sidebar contains navigation options like 'Home', 'My work', and 'All Boards'. The main area displays a table with columns: 'Couples name', 'Person', 'Files', 'Status', 'Email', and 'Phone numbe'. The table is divided into sections: 'Bell Tent Hire Details (if applicable)', 'Something Borrowed', and 'Photos'. A blue arrow points to the 'Photos' section header.

In 'Couples name', add the name of the document you're uploading, such as 'Caterer PLI Certificate':

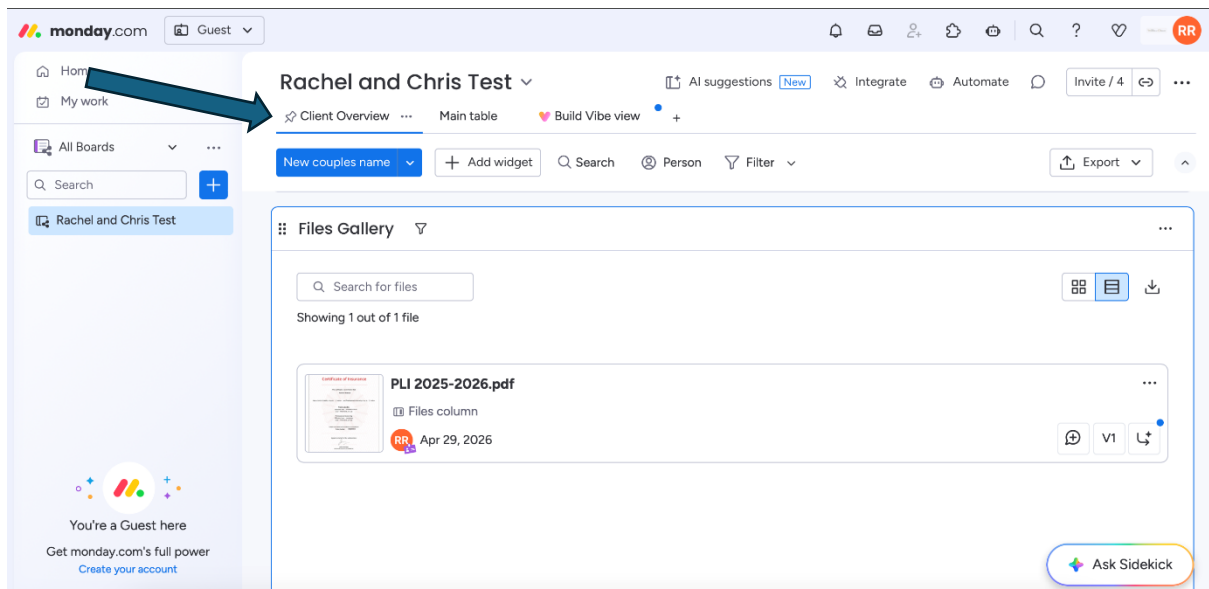
This screenshot shows the same Monday.com interface, but with a blue arrow pointing to the 'Couples name' column in the 'Photos' section. The table now shows a row with the text 'Caterer PLI Certificate' in the 'Couples name' column. The 'Files' column for this row shows a plus icon and a document icon, indicating a file upload. The 'Status' column is highlighted in blue.

In the 'Files' column, you can upload your file from your computer:



The screenshot shows the Monday.com interface for a board titled 'Rachel and Chris Test'. The board is in 'Main table' view. The table has columns: Couples name, Person, Files, Status, Email, and Phone number. There are two sections: 'Bell Tent Hire Details (if applicable)' and 'Photos'. The 'Files' column shows 0 files in the first section and 1 file in the second section. A blue arrow points to the 'Files' column header, and another blue arrow points to the 'Caterer PLI Certificate' file in the 'Files' column.

At the top, click back to 'Client Overview', scroll down to 'Files Gallery' and you will see your document there! You can add as many as you want:



The screenshot shows the Monday.com interface for a board titled 'Rachel and Chris Test'. The board is in 'Client Overview' view. The 'Files Gallery' section shows a search bar, a file list, and a file named 'PLI 2025-2026.pdf'. A blue arrow points to the 'Client Overview' tab at the top.

And that's it! For anything else, drop us an email at enquiries@thewoodsatoakley.co.uk