



Monday.com User Guide

Social Media Content Scheduling

Updated
6/14/2021

Version 1.0

Social Media Content Scheduling with Monday.com

Thank you for leveraging our Monday.com board for your social media content management and scheduling purposes.

This guide was created to walk you through the board, and discuss some of the features it can hold.

Thank you for your involvement, and we hope the tool helps you to grow your platforms ever larger!

- The Brink's Global Marketing Team

Table Of Contents

Here's what you'll find in this guide.

[Monday.com Navigation](#)

[Main Table](#)

[Alternative Views](#)

[Form Input](#)

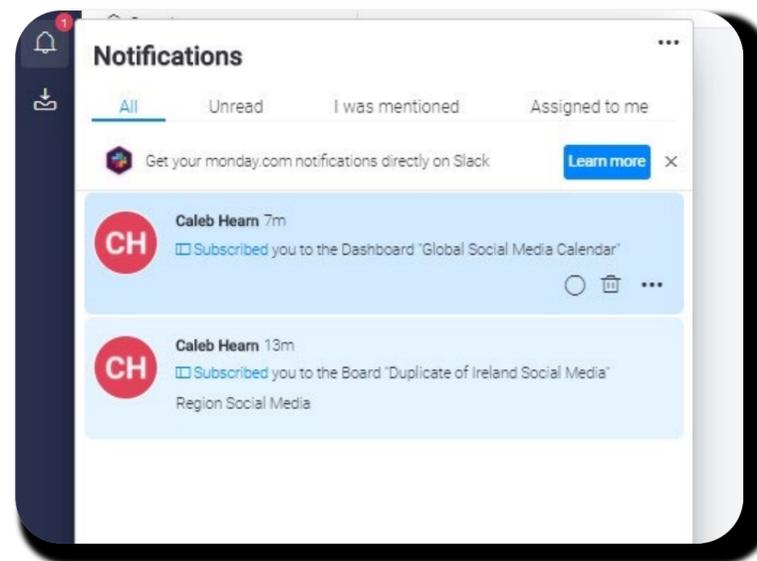
[Integrations & Automations](#)

[Final Notes](#)

Monday.com Navigation

After logging into Monday.com, using the login created from the invitation sent by Global Marketing, both your board and the global combined calendar will be visible on the left hand side. Your region board will hold all of your social media content for you to organize, manage, and schedule. When you add content to this board, it is automatically imported into the global calendar as well, alongside all other regions onboarded onto Monday.com. This allows the different teams to view each other's content, frequency, and habits to support both healthy growth and creativity.

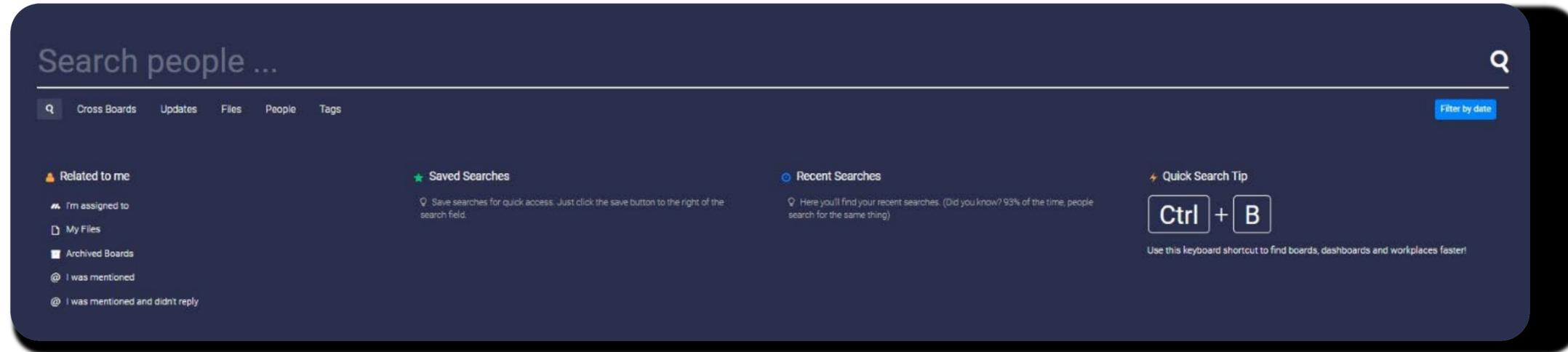
- By clicking the bell on the left hand side, you can see the notifications from your board. This will include new content posted from your team, automated updates, as well as communications from other regions or the Global Marketing team from within the platform.



- Clicking the calendar will show you a quick view of content assigned specifically to you from your team, if your team chooses to do so.

Monday.com Navigation

- As seen below, the search allows you to quickly search your board(s) for any content, files, assignments, etc. This can be done by searching for users, content, hashtags, or other labels giving you the relevant results.



- Other functions include an ability to manage users if using a paid monday.com account, monday.com's own help function, and account management.

Main Table



When you click into your board, the main view you will be utilizing is the main table. This is where you will be able to input your content and relevant details, as well as organize it into different groupings and order as you deem fit. You can also use this to assign different content to different members, if that type of function is desired.

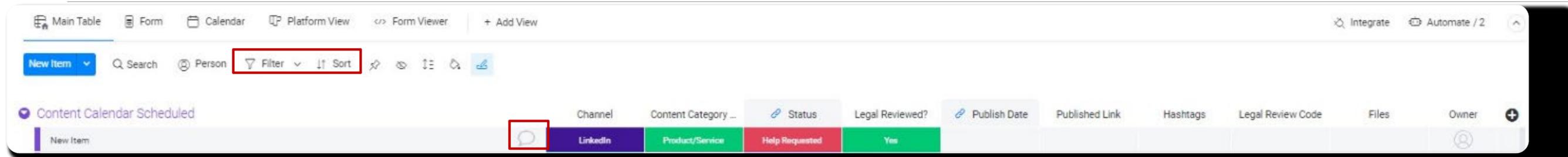
The screenshot shows a software interface with a top navigation bar containing 'Main Table', 'Form', 'Calendar', 'Platform View', 'Form Viewer', and '+ Add View'. On the right side of the navigation bar are 'Integrate' and 'Automate / 2' options. Below the navigation bar is a toolbar with 'New Item', 'Search', 'Person', 'Filter', 'Sort', and other icons. The main area displays two sections: 'Content Calendar Scheduled' and 'Content Published'. Each section contains a table of content items with columns for Channel, Content Category, Status, Legal Reviewed?, Publish Date, Published Link, Hashtags, Legal Review Code, Files, and Owner.

	Channel	Content Category ...	Status	Legal Reviewed?	Publish Date	Published Link	Hashtags	Legal Review Code	Files	Owner
Content Calendar Scheduled										
New Item	LinkedIn	Product/Service	Help Requested	Yes						
Post 1: The oldest ice cream maker alive shares his secrets	Facebook	Holiday	Scheduled	Yes	Dec 25, 2020	example.com/d3	#ice_cream			
Post 2: Pros and cons of eating ice cream in the winter	Twitter	Thought Leadership	Help Requested	Working on it	Dec 18, 2020	example.com	#compare			
Content Published										
Post 3: Top 10 ice cream spots in town	Twitter	Other	Published		Dec 17, 2020	example.com/d2	#newyork			

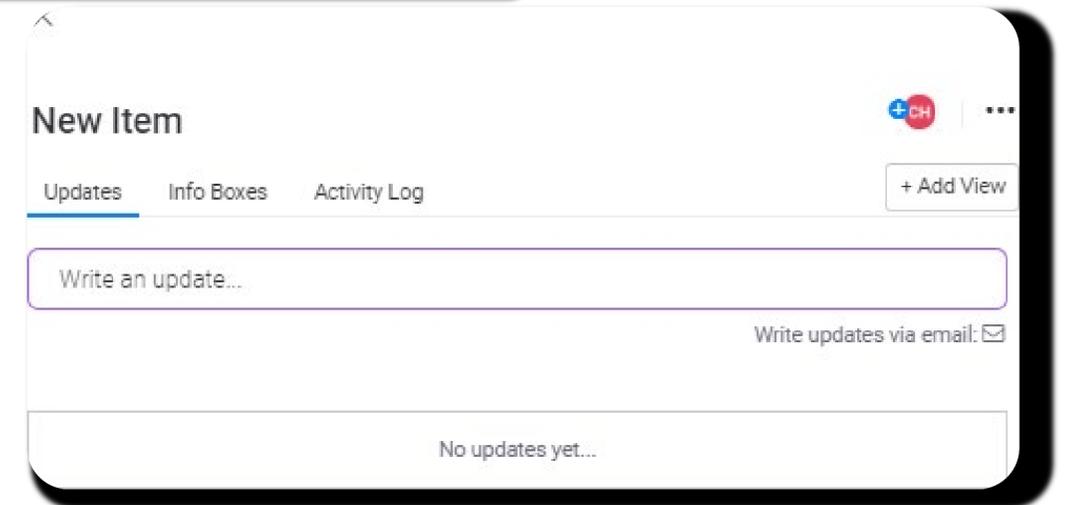
From left to right, the details being inputted include:

- Content: This will be the main written content for the post being created.
- Channel: Which of your current platforms the post is being created for.
- Content Category: Which content category best fits the post being created.
- Status: What stage of completion, review, and/or publishing the post is currently in.
- Legal Reviewed?: Whether or not the post content has been legally reviewed through the legal portal. (Reference the brand library for more information.)
- Publish Date: When the post will be published on its platform.
- Published Link: A link to the published post on its platform, after publishing.
- Hashtags: If applicable, hashtags being linked to the post when published.
- Legal Review Code: Code given after the content has been reviewed and approved by the legal team.
- Files: If applicable, image/video files also being published.
- Owner: A space to assign specific users within the team, if desired.

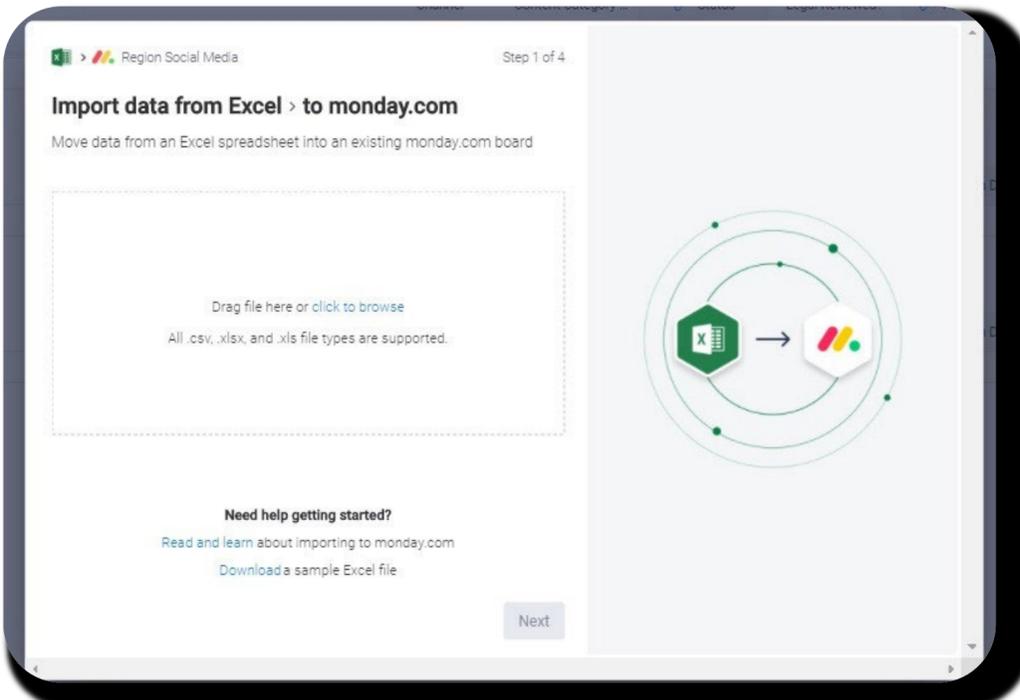
Main Table



The speech bubble seen next to each post inputted allows notes to be taken and communicated between multiple users/teams on that specific item, as seen to the right. You will also be able to see the activity log behind that item, when it was edited, and by whom. This allows quick notes and edits to be done and drafted, while also keeping a record to work from.



Above the table are several different filtering, sorting, and coloring options to organize quickly through the posts. Groups can also be created to organize items out based on chosen criteria, such as scheduled vs. published or the different types of content category.



Important to note:

- By clicking next to new item, you can walkthrough a step by step data import from excel, if you would rather import straight into your table as such.
- How deep your team chooses to use this board is up to you, the minimum Global Marketing asks is that your content is visible for us to see proactively.

Alternative Views



To better visualize your posts, there are several other views you can use to organize your posts differently and view from a grand level. The first and most primary is the calendar view. Here you will be able to color by each of the data categories on the right, and view them across their publish dates.

The screenshot displays a calendar interface for December 2020. The calendar grid shows days from Monday to Sunday. A large light blue box with a '+ Add' button is positioned over the first two days of the month (Dec 30 and Dec 31). Three posts are visible as colored bars on the calendar:

- Post 3:** 'Top 10 ice cream spots I...' (light blue bar) on Wednesday, Dec 16.
- Post 2:** 'Pros and cons of eating I...' (medium blue bar) on Thursday, Dec 17.
- Post 1:** 'The oldest ice cream ma...' (dark blue bar) on Friday, Dec 18.

The right sidebar contains the following settings:

- Customize View**
- Calendar Columns**
 - Publish Date
 - Show hours
 - Show Color Legend
- Color by**
 - Channel
- Display Settings**
 - Fullscreen View

At the bottom of the calendar, there is a legend for the channels: Facebook (light blue dot), LinkedIn (purple dot), and Twitter (medium blue dot).

Alternative Views



Another alternative is platform view. Here you will be able to distinguish one data category, and choose which additional data you would like displayed. This is just another way to quickly view your posts, and see a frequency across different categories, such as how many product posts you have for a week compared to thought leadership.

The screenshot displays a Kanban board with seven columns representing different content categories. Each column has a header with the category name and a count, and a 'New Item' card showing filters for Channel and Content Category. The 'Other' column is currently selected, showing a post about ice cream spots. A settings sidebar on the right allows for customizing the view, including Kanban Column, Cover Columns, Cover display mode, Card Columns, and Display Settings.

Category	Count	Channel	Content Category
Product/Service	1	LinkedIn	Product/Service
Holiday	1	Facebook	Holiday
Thought Leadership	1	Twitter	Thought Leadership
Recruiting/Job Posting	0		
Business Continuity	0		
Other	1	Twitter	Other
Regional Company News	0		

Customize View

- Kanban Column: Content Category (Status) x
- Cover Columns: Files
- Cover display mode: Crop, Fit
- Card Columns: All Columns, Channel, Content Category (Status), Status, Legal Reviewed?, Publish Date, Owner, Divide by groups
- Display Settings: Fullscreen View

Form Input



In case of a need to share internally to outside teams, externally to possible agency support, or simply within your own team as a different way of data submission, there is also a form available to be shared. As seen below, it quickly asks the relevant questions to the connected data, and automatically uploads that data into your main table after form submission. To share this form, simply click the form tab within your board, and click share form to provide a link to whomever necessary.

Preview

Share form

Social Media Post Upload

This form is for your ease of access or easy sharing for uploading a post and necessary starter fields. Alternatively, you can also simply add your content using the main table, where you will also be updating statuses and information such as post status, legal review status and relevant hashtags if there are any.

Content
Please fill out the post as it will be seen on its respective platform. If it includes a picture, please add it as an attached file at the bottom.

Required

Channel
Please choose the platform this post will be uploaded to

Required

Content Category
Please choose from below the closest content category. If there is not one easily available, please choose other and include on the bottom a note on what category it should be.

Publish Date
When do you plan to publish this post?

Required

Files
Please include any relevant files like the image that may be utilized.

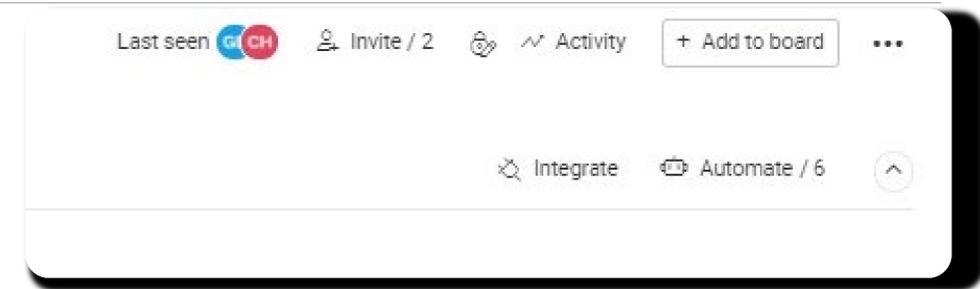
[Add files](#)

Additional Comments/Notes

Integrations & Automations

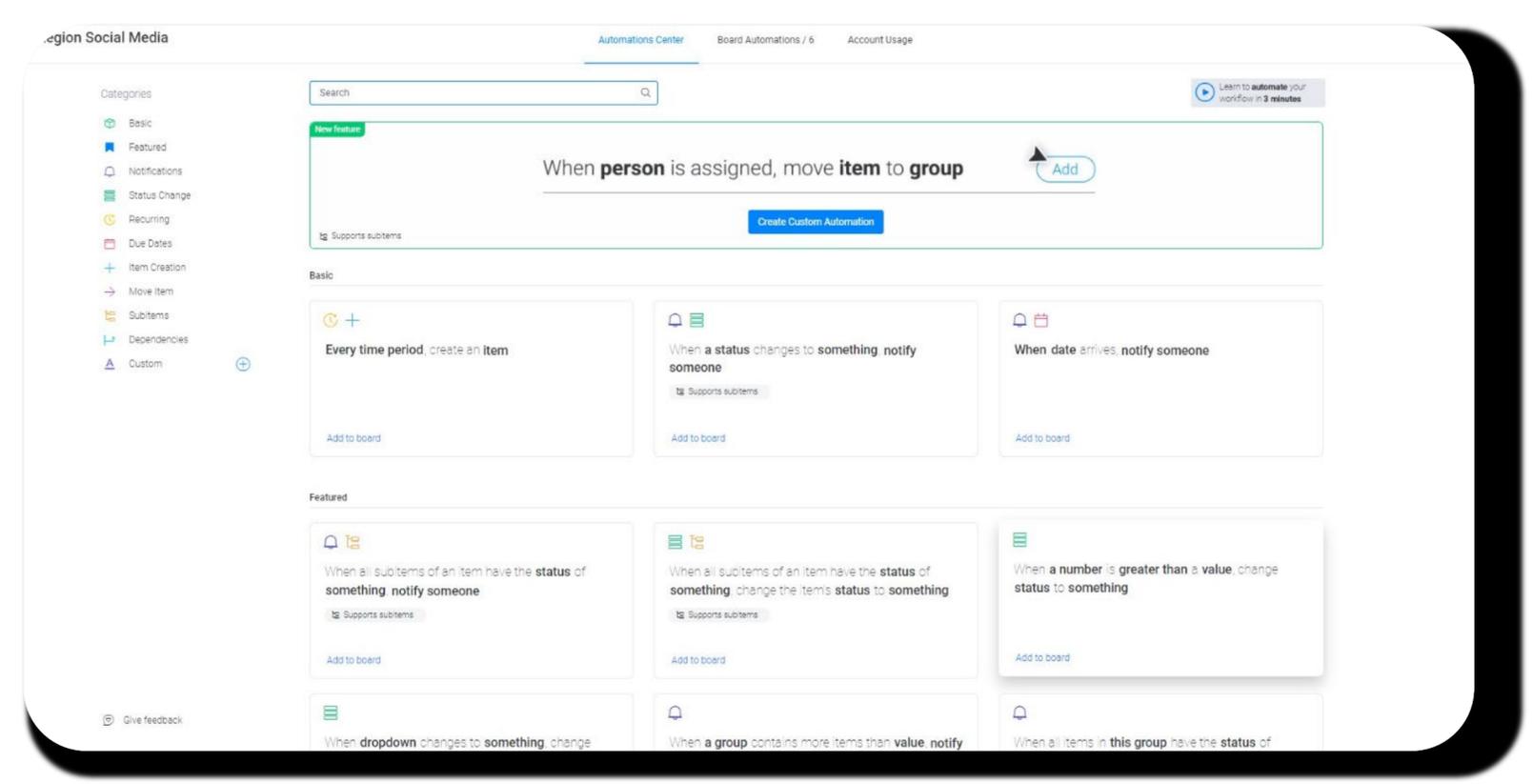
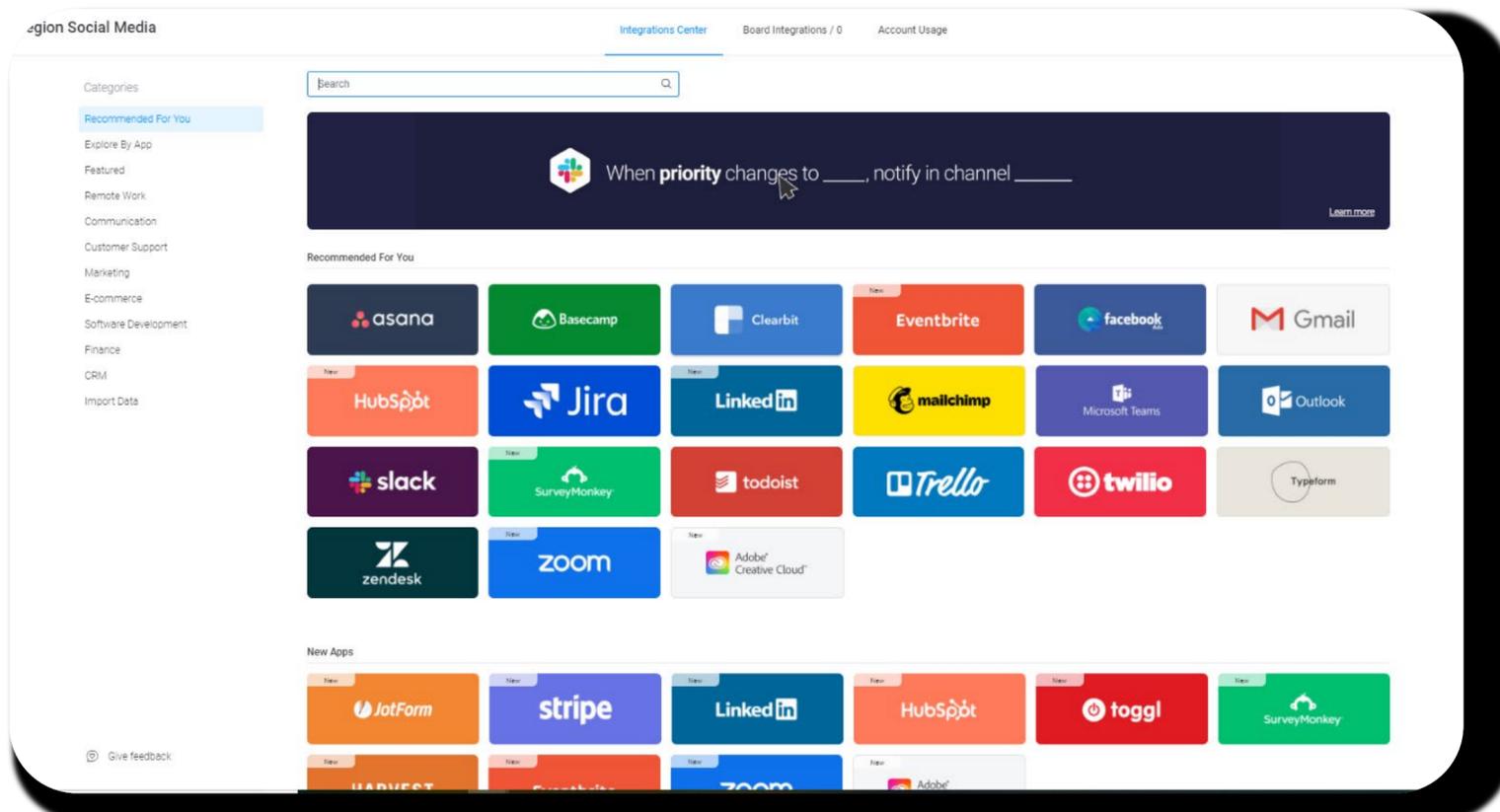


Some of the most interesting parts of Monday are within its many capabilities it can perform from integrated apps or self built automations. Looking at the top right of your board, you will be able to click on either and start a process towards adding more capability into your board, if you so choose.



Depending on the app, you may be able to add even more ability to your board. Some basic integrations could include ad results from Facebook automatically being imported, emails automatically being sorted into data from an inbox, or a notification being sent to a Microsoft teams group out of a status change.

This can be compounded by premade or custom automations as well. This allows for certain actions to automatically occur, depending on the written situation. One common example would be when status x is changed to Help Needed, notify person y.



Final Notes



This tool is created with the full intent to support Brink's regions and business units as they progress into social media platforms and creative directions. The Global Marketing team is always working to improve how we can better support you, so please feel free to give all the feedback you have! If you find something is not working the way you would expect, or would like to add some type of function, please reach out to Caleb Hearn either within monday.com or at Caleb.Hearn@brinksinc.com. Please also feel free to cooperate with fellow regions as they create their own content and plans!

As a reminder, you can find further details in social media management and expectations on the brand library at <https://customerportal.brinksinc.com/en/web/brinks-resource-library/>. Here you will find more documentation on both legal and brand expectations, as well as further support guides and important request forms to utilize if you plan on entering another platform.

Pre-existing automations:

- When Status changes to Help Requested, notify Caleb Hearn
- When Status changes to Reshare: Simple, move item to Content Reshared
- 2 days before Publish Date arrives and Legal Reviewed? is Working on it, notify Caleb Hearn and notify Owner
- When Status changes to Reshare: New Content, move item to Content Reshared
- When Publish Date arrives and Status is Published, move item to Content Published
- When an Update is created, notify Board Subscribers.