Template Board Structure

When trying to run ActionLink Studio, you need to have it added as a view on the latest version of "□□ AL - Client Dashboards vx". This is because ActionLink uses this monday board with a certain column structure and column ids to save certain data on your monday account so that no important client information is saved on ActionLink's servers. This makes your data secure and puts you in total control of your client information.

It also enables you to be able to run automations off of certain ActionLink events like "when new client is created, email them their username and password". Here is the latest board structure at the time of publishing this document (template v3):

Columns

id	title	type	Used for
name	Name	name	Name of the client
color_mkphxcvd	Stage	status	Stage of client service
color_mkq2xgv5	Portal Status	status	Status of portal (not used currently)
email_mkpjpsva	Client's Email	email	Storing email of client
link_mkphzjn9	⚠ DONT EDIT: Link	link	Link to portal
text_mkphjv3v	⚠ DONT EDIT: Password	text	Pass to portal
text_mkqa4cn7	⚠ DONT EDIT: AL Id	text	ActionLink id in our backend

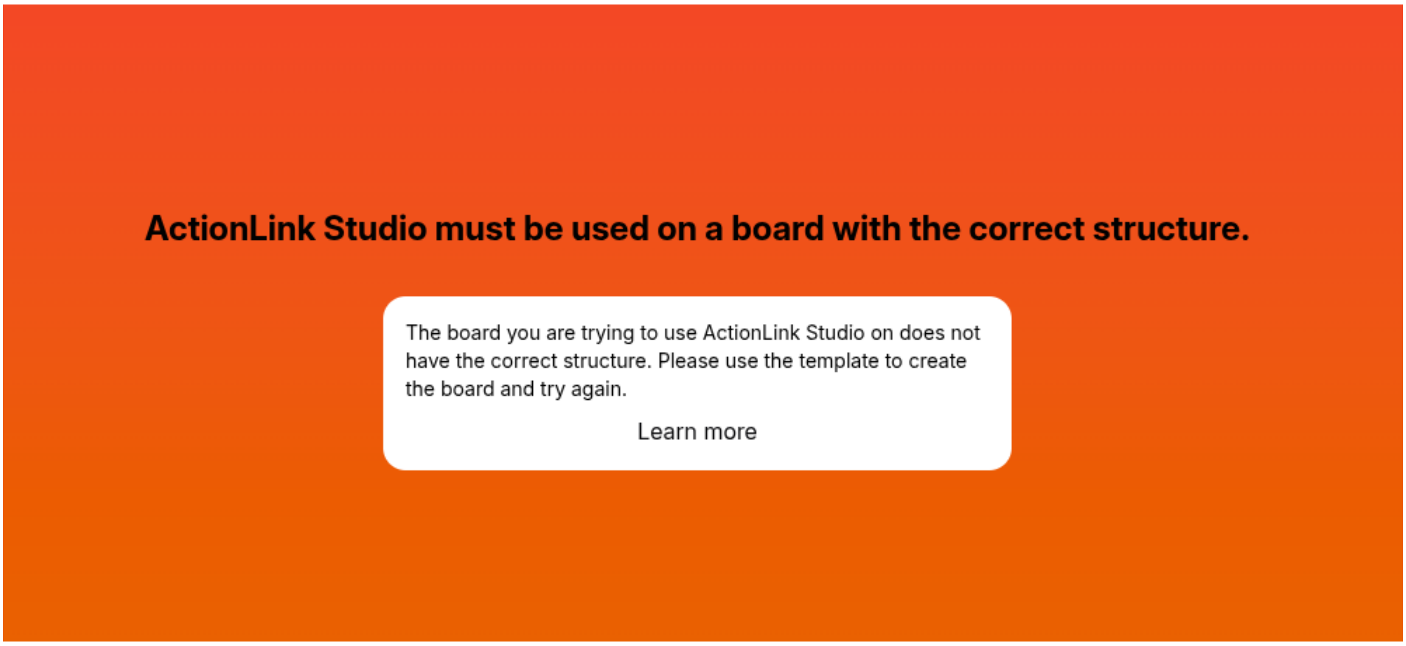
Subitem Columns

id	type	column.id	column.title	column.type	Used for
long_text_mkphpfed	long_text	long_text_mkphpfed	⚠ DONT EDIT: Settings	long_text	Storing settings of an assignement

id	type	column.id	column.title	column.type	Used for
text_mkphrh3b	text	text_mkphrh3b	⚠ DONT EDIT: Source Board Id	text	Board Id of assignment
text_mkph8c6b	text	text_mkph8c6b	⚠ DONT EDIT: Source Item Id	text	Item Id of assignment
text_mkpsgpt1	text	text_mkpsgpt1	⚠ DONT EDIT: Main Status Id	text	Status Column Id of Assignment
link_mkphsyd2	link	link_mkphsyd2	⚠ DONT EDIT: Link	link	Link to Assigned Item

Problem

If you run ActionLink Studio on an outdated version of the template or any board without these column structure you'll receive this error:

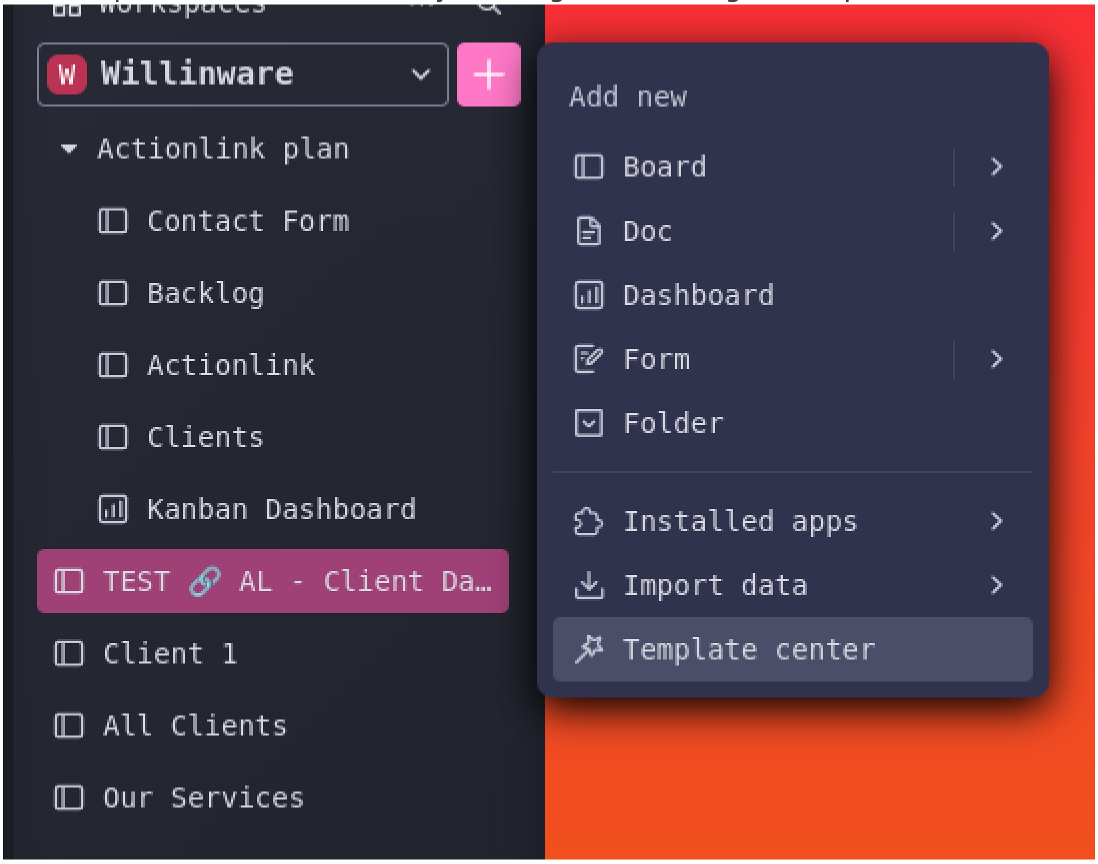


This is because the version of your ActionLink Studio needs certain columns present to function properly and cannot find those columns on this board.

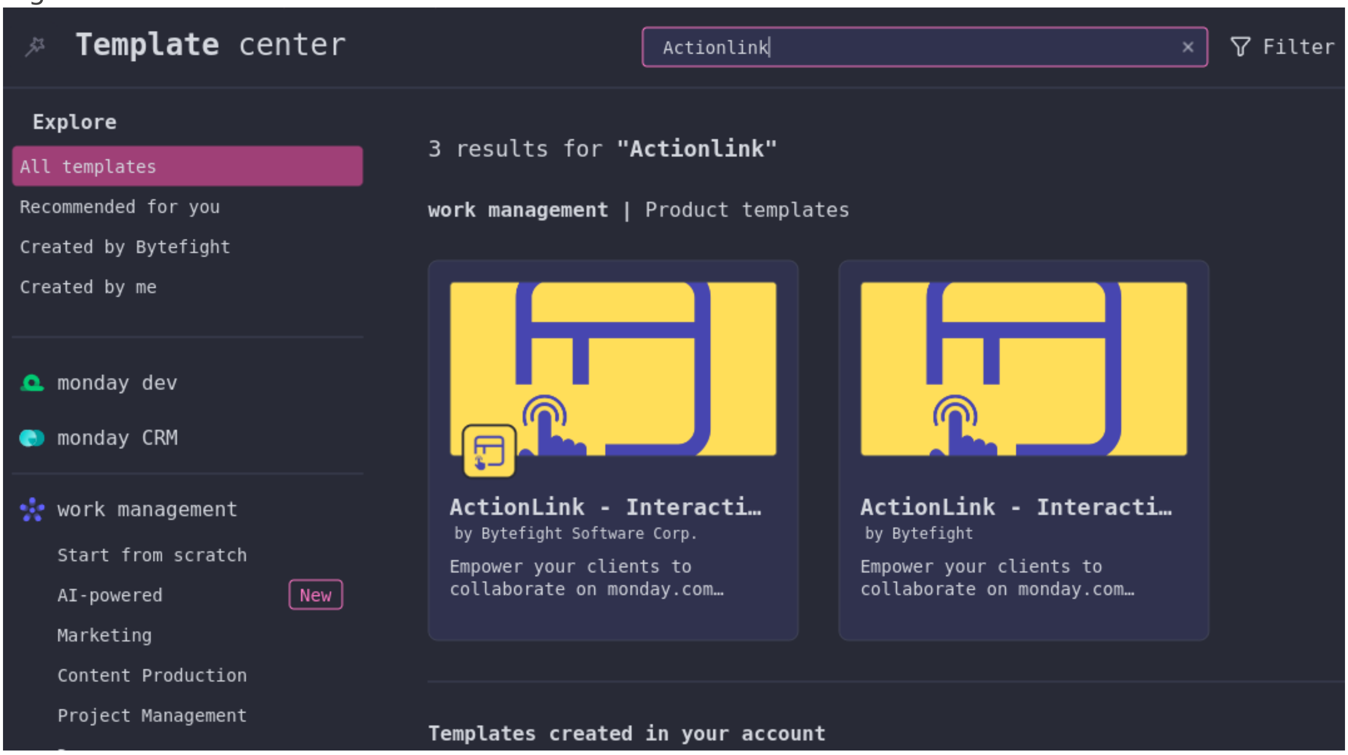
Solution

Here is a step-by-step trouble shooting of this issue:

1. Make sure your ActionLink Studio is on the right board! The studio can only run on the template board so if it's on anything else, it won't run!
2. If it is on the right board and still getting the same error, there might be a newer version of the template that you need to switch to. We're currently building a migration tool that will automatically bring everything to the new board but for the time being, try and add the template as a new board by clicking on +, Going to template center

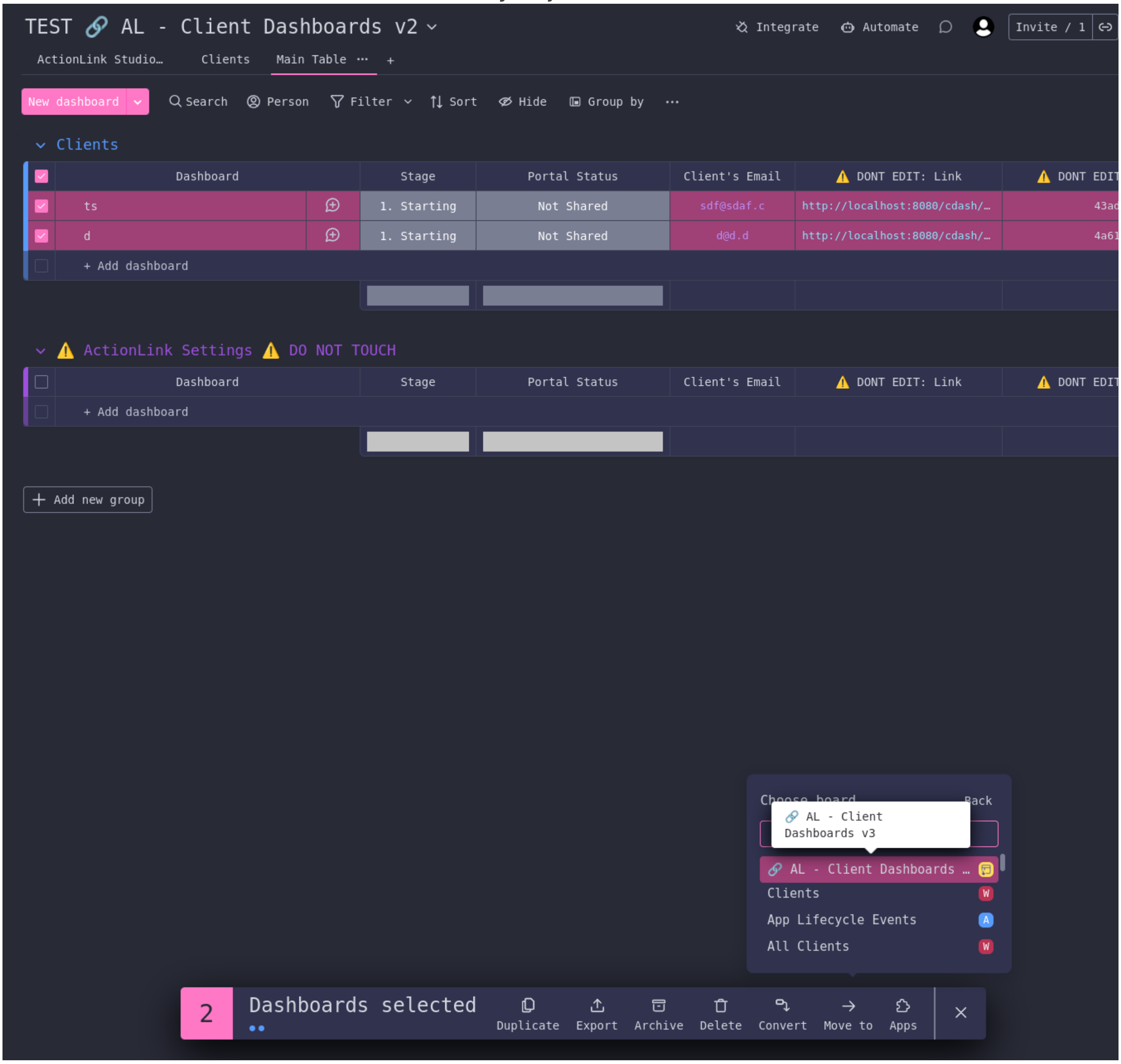


3. Here search for "ActionLink" and choose the first result that comes up with the ActionLink logo



4. Add the template to your workspace!

5. Go to your old ActionLink board and select all items in the main table and click move to, move to board and choose the new board you just created.



6. This will bring your old clients from the old board to the new template. Go to the new template and choose the ActionLink Studio view. Go to each client and try and preview their portals to make sure the move was successful. If you come across any issue please feel free to email me at will@actionlink.app

We try our best not to change the template too often and after v3 if we need to change it we'll make sure to include a migration tool to make the migration painless and automatic. So if you are not on v3 please do move to v3 so you can use the migration tools to upgrade to higher versions if needed.

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