

Sync Items and Boards for monday.com

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The Sync Items and Boards application for monday.com provides an integration between your monday.com boards. With this, you can set up integrations to automatically change values on one board based on the values from another board. The app works similarly to the popular VLOOKUP feature for spreadsheets. The Sync Items and Boards app allows you to automate certain changes on your boards and make your monday work environment more productive, effective, and rewarding.

Getting Started

These straightforward actions will deliver the add-on to your monday.com instance just in a few clicks.

After installing the app, add the Configuration Board View to any of your boards by clicking the plus icon, then selecting "Apps" > "Explore more apps"

QA Source Board ⓘ ☆

🏠 Main Table | +

The screenshot shows the QA Source Board interface. A red arrow points from the top left towards the 'Explore more apps' button in the 'Apps' menu. The 'Board Views' menu is open, showing options like Table, Gantt, Chart, Calendar, Kanban, Files Gallery, Form, and Blank view. The 'Apps' menu is also open, showing a list of installed apps: GitLab Integration for Boards, Canva Design, Google Forms, Git Integration for Boards, GitHub Integration for Boards, and Bitbucket Integration for Boards. The 'Explore more apps' button is highlighted with a red box.

Board Views		Sort	Hide	...
<input type="checkbox"/>	Item 1			
<input type="checkbox"/>	Item 2			
<input type="checkbox"/>	Item 3			
<input type="checkbox"/>	Item 4			
<input type="checkbox"/>	Anita			
<input type="checkbox"/>	Meri			
<input type="checkbox"/>	Java			
<input type="checkbox"/>	test			
<input type="checkbox"/>	test			

Installed	Date
GitLab Integration for Boards	4 Dec
Canva Design	14 Dec
Google Forms	21 Dec
Git Integration for Boards	
GitHub Integration for Boards	
Bitbucket Integration for Boards	

Here, find the Sync Items and Boards app - Configuration and click "Open in board". Note that it doesn't matter which board you add this Configuration page to, it will control the configuration for your whole workspace.

Create a Static Configuration

Static configurations will control the synchronization between two boards. On the configuration page, there are two tabs. Under "Static Configurations" you can see all of your existing configurations. Under "Main" you can add a new configuration.

Source Board

Source Key Value

Source Column Value

Target Board

Target Key Value

Target Column Value

Save

To add a new configuration, first select a Source Board and a Target Board. The Source board is where the integration takes the values from, and the Target board is where the changes will happen.

Source Board

Target Board

Source Key Value

Target Key Value

Source Column Value

Target Column Value

Save

Next, fill in the last four dropdowns:

Source Key Value: This is a column on the source board. The integration will look for matching values in this column. When a change occurs on the target board, resulting in a cell value matching a cell value in this column on the source board, the integration will be triggered.

Target Key Value: This is a column on the target board. When someone changes a cell value in this column, the integration will start searching for matching values in the "Source Key Value" column on the source board. If the new value matches the value in the "Source Key Value" column, the integration will be triggered.

Source Column Value: This is a column on the source board. The value from this column will be taken and transferred to the target board after the integration is triggered.

Target Column Value: This is a column on the target board. The value of the cell will be automatically changed to the matching "Source Column Value" after the integration is triggered.

Tip: try filling in the same value horizontally. The "Key" field triggers the integration and the "Column" field will be changed automatically.

The screenshot shows the Appvibe Configuration page for static configurations. It features two columns of settings: Source Board and Target Board. The Source Board is set to 'QA Source Board' and the Target Board is set to 'QA Target Board'. Below these, there are four fields: Source Key Value (Date), Target Key Value (Date), Source Column Value (Status), and Target Column Value (Status). A red box highlights these four fields. A green 'Save' button is located at the bottom right of the configuration area.

Activating the Configuration

To activate the configuration, go to your Target board.

Click on "Integrations" and find Sync Items and Boards.

The screenshot shows the 'QA Target Board' interface. At the top, there are options for 'Integrate', 'Automate', and 'Invite / 1'. The 'Integrate' button is highlighted with a red box. Below the header, there is a table with columns for 'Item', 'Person', 'Status', and 'Date'. The table contains three rows of items, all with a status of 'Stuck' and a date of '4 Dec'. A red box highlights the 'Integrate' button in the top right corner.

Select from the three available integrations the one that applies to your configuration. For example, if you selected "Date" for Source Key Value and Target Key Column, and "Status" for Source Column Value and Target Column Value, then select the integration "When the date changes, update the status on the linked board".

< Back to Integrations

SI Integration SI by Apprise

> SI Integration

When any column changes, change the linked column values

Add to board

> SI Integration

When the date changes, update the status on the linked board **board**

Add to board

> SI Integration

When the person changes, change the status on the linked board

Add to board

If the integration contains a clickable "board" text, it means you need to click on it and select your target board before adding it to the board:

< Back

When the date changes, update the status on the linked board **board**

board

Q

- QA Target Board
- QA Source Board
- Java B
- Start from scratch
- More boards

Integration Add To Board

Frequently Asked Questions

What happens if the integration finds two matches on the source board?

In this case, only the first match will be kept, from the top down. For example, this is the Source Board:

... ▾ Group 1 13 Items

<input type="checkbox"/>	Item		Person	Status	Date
<input type="checkbox"/>	Item 1	+		Working on it	4 Dec
<input type="checkbox"/>	Item 2	+		Stuck	4 Dec
<input type="checkbox"/>	Item 3	+		Done	21 Dec

If you select "4 Dec" on the target board, the new status will be "Working on it" and not "Stuck".

▾ Testing Date -> Status 3 Items

<input type="checkbox"/>	Item		Person	Status	Date	-
<input type="checkbox"/>	Item 1	+		Working on it	4 Dec	
<input type="checkbox"/>	Item 2	+				
<input type="checkbox"/>	Item 3	+				

What does it mean if I get an error message about an "infinite loop"?

Sometimes you will be unable to create a static configuration and the error message tells you it's because it would create an infinite loop. This means that you already have a configuration that changes certain items, and the new configuration would interfere with the previous one in a way that would create an infinite loop of changes.

To resolve this, please go to the "Static configurations" tab and remove the integration that is set up for the fields.

Release Notes

Revision #5

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