

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 'Board Views' menu to the 'Explore more apps' button. The 'Board Views' menu is open, showing options: Table, Gantt, Chart, Calendar, Kanban, Files Gallery, Form, Blank view, Apps, and More views. The 'Apps' option is highlighted. The 'Explore more apps' button is also highlighted with a red box. The background shows a table with columns for Item, Date, and Status.

Item	Date	Status
Item 1	4 Dec	
Item 2	14 Dec	
Item 3	21 Dec	
Item 4		
Anita		
Meri		
Java		
test		Stuck
test		

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 Board

Source Key Value

Source Key Value

Source Column Value

Source Column Value

Target Board

Target Board

Target Key Value

Target Key Value

Target Column 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

QA Source Board

Target Board

QA Target Board

Source Key Value

Source Key Value

Target Key Value

Target Key Value

Source Column Value

Source Column Value

Target 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 'Static configurations' page in the Appvibe interface. It contains four dropdown menus arranged in a 2x2 grid. The top row is for 'Source Board' (QA Source Board) and 'Target Board' (QA Target Board). The bottom row is for 'Source Key Value' (Date) and 'Target Key Value' (Date). Below these are 'Source Column Value' (Status) and 'Target Column Value' (Status). A red rectangle highlights the four key and column value dropdowns. A green 'Save' button is located at the bottom right of the configuration area.

Source Board	Target Board
QA Source Board	QA Target Board
Source Key Value: Date	Target Key Value: Date
Source Column Value: Status	Target Column Value: Status

Save

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's a header with the board name, an 'Activity' section, and an 'Invite / 1' button. Below the header, there's a navigation bar with 'Main Table' and a '+' icon. On the right side of the navigation bar, there's a red box highlighting the 'Integrate' button, which is next to a 'Automate' button. Below the navigation bar, there's a table with columns: Item, Person, Status, Date, and a '+' icon. The table has three rows of data, all with 'Stuck' status. A red rectangle highlights the 'Integrate' button in the navigation bar.

Item	Person	Status	Date	+
Item 1		Stuck	4 Dec	
Item 2		Stuck	4 Dec	
Item 3		Stuck	4 Dec	
+ Add Item				

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 Appvite



> 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

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

SI 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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