Date Controlled Groups

Introduction

With Date Controlled Groups your items are reordered at the specified schedule and moved to groups based on the "time left until deadline". The move will only take place at the time(s) set in the scheduler recipe. With this you can easily transform your groups to buckets with specified priorities.
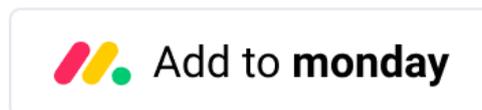
The Date Controlled Groups app is developed by monday.com power users and is available on the monday.com marketplace. When downloaded from the marketplace the app is installed in trial mode (10 days) and can be unlocked through the Excellent Team shop at any time.

You can skip to:

- Installation
- Authorize the app
- Configuration
- Usage

Installation

When you have already installed this app (e.g. in trial mode) you can skip to the Configuration section. There is no difference between the trial version or the paid version.

By clicking the image above you add this app to your monday.com account. In case you have multiple accounts, please select the correct account in the upper right corner. During the installation you are asked to authorize the app (see section below).

After installation of the Excellent Team app into your monday.com account you can add the app recipe(s) to your boards. You do this by clicking the integrations and find the monday App you are interested in.

Authorize the app

During the installation of the app in your monday.com account the required permissions (scope) for this app were shown. The app does not store user access tokens but the monday.com platform will grant the permissions shown during the installation for 60 seconds to the app. All actions will be performed with the user credentials of the user that installed the app.

Install <<App Name>> in your account
The app will be available to all users in your account

On monday.com, <<App Name>> would like to:

Read all of your boards data

Modify any of your boards' data

Send notifications on your behalf

Create and modify webhooks

The requested permissions (scope) may differ for different apps

Cancel   Install

Configuration

There are two recipes available that need to be active on the same board.

With the scheduler recipe you define at which moment (each day, each Nth day of the week and so on) and at which hour the items in your board are reordered based on the recipe that define the groups

Caution: the hour specified in the schedule is not exact. The actual moment the items are reordered can be up to 20 minutes past the specified hour.

The other recipe defines what the criteria is to move the item(s) to the group(s) specified. You can use this recipe as many times you need it on your board to specify different groups for different durations.

Caution: the duration can be specified in different units. The apps always calculates back to hours and therefore specifying minutes or seconds does not have any effect.

Besides triggering the movement of items on the scheduled event you can also build a **custom automation** (like button click or status change) to trigger this movement. The app's action shows up in the **custom automation** builder.

Usage

You can build multiple recipes where recipes can check different date columns. When you try to add a recipe for a given data column to move to a specified group (target group) and that target group is already used in another recipe with the same data column, the app will not add the recipe to the board and gives a warning notification.

When multiple recipes try to move an item to multiple target groups the recipe which is closest to the time the reordering takes place will win. All other recipes for that item will be ignored. With this you get the items which are closest to the due date in your top groups.

You can also enter a minus sign to specify where to move items where the due date has passed. This can be used to move items to "archiving" groups. When combined with standard monday.com automations the historic items can also be moved to another board.

As an example: the set of recipes below resulted in the board shown underneath. In this example the circled dates triggered the move to that group.

5 Active automations on **Date Groups** board 0 Actions

+ Add new integration

Date Controlled...   On scheduled event check **Date 2** and when due in **3 weeks** move item to **Within 21 days**.
On
Automation ID: 27582338
Created by Bas de Bruin · Updated just now

+ Add description
Date Controlled...   On scheduled event check **Date** and when due in **3 weeks** move item to **Within 21 days**.
On
Automation ID: 27582308
Created by Bas de Bruin · Updated just now

Date Controlled...   On scheduled event check **Date** and when due in **5 days** move item to **Next**.
On
Automation ID: 27582272
Created by Bas de Bruin · Updated 1 minute ago

Date Controlled...   On scheduled event check **Date** and when due in **2 days** move item to **Now**.
On
Automation ID: 27582229
Created by Bas de Bruin · Updated 2 minutes ago

Date Controlled...   **Every day** reorder the items in groups specified in the "Date Controlled Group" recipes
On
Automation ID: 27582161
Created by Bas de Bruin · Updated 2 minutes ago

Date Groups ☆
Add board description

Integrate / 5   Automate / 0   / 1   Activities / 0   ...

Main Table ∨   New Item ∨   Search   Person   Filter ∨   Sort   ...

Now

		Date	Date 2	Person	Status	
Item 3		24 Dec	23 Dec		Done	
Item 1		24 Dec			Done	
+ Add						

Next

		Date	Date 2	Person	Status	
Item 2		26 Dec	30 Dec		Done	
+ Add						

Within 21 days

		Date	Date 2	Person	Status	
Item 4		15 Oct, 2021	23 Dec		Done	
+ Add						

Later

		Date	Date 2	Person	Status	
new			22 Dec		Done	
+ Add						