



Match Index Column

Introduction

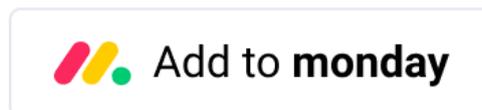
Match Index Column works like the famous Excel formulas MATCH() and INDEX(). It copies the contents of a cell from a source board to the target board when the values in the match columns are equal. Most importantly the column type in the target board is the same as the column type in the source board. Therefore you can use the cell contents in the target board for any other monday.com automation.

The Match Index Column 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](#)
- [Notifications](#)

Installation



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	The requested permissions (scope) may differ for different apps
Modify any of your boards' data	
Send notifications on your behalf	
Create and modify webhooks	

Cancel

Install

Configuration

After successful installation of the app you can add the integration to your board by clicking the “Integrate” link. Before doing so you need to understand some terminology used in the app’s recipe. The Match Index Column app relies on 6 parameters:

- **Target board:** the board where you install the app
- **Source board:** to be selected in the recipe

The app copies and syncs data from the source board(s) to the target board. You can configure multiple source boards by adding multiple instances of the recipe to your target board. A single purchase grants the use of one (1) target board, different packages are available in case you need multiple target boards.

- **Source board match column:** this is the second option in the recipe and allows you to pick any name, text or number column for matching
- **Target board match column:** this third option in the recipe is populated with columns in your target board that are of the same type as the selected source board match column. An exception is when you choose the name (left most) column as your match column in the source board, in this case the selection for the target match column shows all available text columns.

To prevent building endless loops the available choices in the recipe automatically exclude some columns. As an example: you can’t select the same column for the target board match and index.

Caution: due to a confirmed bug in monday.com the options for the recipe fields are not re-generated when you change an earlier field. Therefore you need to work from left to right in the recipe configuration and if you want to change an earlier selected column you need to exit the recipe configuration and start over. The app does do an additional check and may fail with a notification “ERROR: invalid recipe configuration. Please try again”.

- **Source board index column:** this is where you configure from which column a cell value will be copied (and kept in sync) with the target board. Supported column type for the index column are: name (left most column), text, number, date, timeline, status, dropdown en email.
- **Target board index column:** this is the column that receive the cell value from the source board index column. This column needs to be of the same type as the source board index column.

Remark: (for index columns of type status and dropdown). When the source cell contains a value that is not present in the target board status or dropdown column, the value will be added to the status or dropdown column in the target board. For a status column the monday platform does not provide a way to user the same color in the target board, so you might want to change the color of the status value manually.

With the fields described above this recipe is used to control the app:

- Match items in source board – match column on current board – match column. Return the value from the source board – this column into this column in the current board.

Usage

On first use of the feature you will be granted a 10-day trial period, unless you purchased the Excellent Team app in the shop. If you want to use the feature after this trial period you can purchase the feature in the [Excellent Team](#) shop. After purchasing the feature it will be available immediately and if you already configured the feature you will not lose your configuration.

The feature is fully functional in trial mode. You will receive a notification in monday.com that show that the feature is in trial mode. A few days before the end of the 10 day trial period you will receive another notification. The feature stops working after the trial period is passed and you can safely remove the feature from your board(s).

The image shows a screenshot of the monday.com interface. At the top, there is a 'Target board' with a table of data. Below it, there is a 'Source board' with a table of data. Red arrows and eclipses indicate the matching columns configured in the recipes. Purple arrows show the direction in which cell content is copied (and kept in sync) from the source board to the target board. The text 'Match columns' is written in red, and 'Index columns' is written in purple.

AUTO-Key	NAME-Key	Customer	Person	Status	Date	Numbers	Dropdown	Timeline
INV-001	1. Google	Google		Status 1	1 Jun	11	two	1 - 11 May
INV-002	2. Bravo	Bravo		Status 2	2 May	22	two	2 - 12 May
INV-003	3. Microsoft	Microsoft		Status 3	3 May	33	three	4 - 14 May
INV-004	4. Gamma	Gamma		Status 4	4 May	44	two	3 - 13 May

Auto ID	Person	Status	Customer	Invoice	Numbers	Date	Timeline	Dropdown
1. Google	INV-001	Status 1	Google		11	1 Jun	1 - 11 May	two
2. Bravo	INV-002	Status 2	Bravo		22	2 May	2 - 12 May	two
3. Microsoft	INV-003	Status 3	Microsoft		33	3 May	4 - 14 May	three
4. Gamma	INV-004	Status 4	Gamma		44	4 May	3 - 13 May	two one

The picture shows the target board (including the recipes) on the top. The red arrows and eclipses indicate the matching columns configured in the recipes. The purple arrows show the direction in which cell content is copied (and kept in sync) from the source board to the target board.

What happens when

Remark: when the source board match column contains duplicate values and this value is entered into the target board match column the index columns in the target board will be cleared. Compare this with the question: "what is Jose's age" and you have more records in your source with the name Jose.

When a new recipe is added

When a new recipe is added the app will check all values in the target board match column and matches these values to the configured source board match column. When there is a match the cell content found in the source board will be copied (and kept in sync) to the configured column in the target board.

When an index value in the source board is changed

When an index value in the source board is changed the matching value in the target board will be changed automatically.

When a match value in the target board is changed

When a match value in the target board is changed the app tries to match the new value to the match column in the source board. If a match is found the cell contents (for all columns configured in recipes) will be copied to the target board. If no match is found in the source board match column the cell in the target board will be cleared.

When a match value in the source board is changed

This is probably an exception as you are changing the key in the source board. The app will go through all target boards where this key is referenced and clears the index columns in these target boards. If the new key is found in the target board(s) these items will receive the cell contents of the configured index columns. When you introduce a duplicate key the cell contents in the target board(s) where the duplicate key is referenced will be cleared. This action requires a large number of API call made to the monday.com platform (see complexity limit below).

What triggers the app

There are 3 actions the triggers the app:

- **Column changes:**
 - changing the cell content in any configured match column in either the source or the target board
 - changing the cell content in any configured index column (source boards only)
- **Item name changes:**
 - Changing the item name (source boards only)
- **New items:**
 - New item created (target board only) with column values. This can be because of a monday form submission or e.g. the Stripe integration that creates a new items.

Complexity limits

The monday.com platform limits the amount of actions any app can perform. This complexity rate limit is reset every minute. Because some actions (specially changing the match value in the source board) it is possible that the app reaches this limit. The app tries to predict that and send a notification that the action will be retried in 60 seconds. In some case the notification asks the user to redo the action after 60 seconds.

In general it is not a good idea to use the multi select option and change all match column values in your source board in one go. This is the case for any app.

Notifications

The app sends monday in-system notifications (Bell icon in left sidebar) to notify in case of issues or warnings. The list below explains these possible notifications.

Add recipe	<p>You need to purchase the feature for each Target board where you want to use match / index. You currently used all (x) available Target boards in your account.</p> <p>The app is licensed per Target board (the board that receives data from your source board(s)). When you want to use multiple target boards you need to purchase additional licenses. Please contact info@excellent-team.nl for available volume discounts.</p>
Add recipe	<p>The solution Match Index Column is already configured for Target board [board name] and index column [column name].</p> <p>A target board can have only one recipe that is configured for the same index column (otherwise there would be conflicting content).</p>
Add recipe	<p>ERROR: invalid recipe configuration. Please try again.</p> <p>The app found an issue with your recipe. It is likely because you selected a field in the recipe, followed by the next field, followed by re-selecting the first field. Due to a confirmed bug in monday.com this you need to fill the fields in the recipe from left to right.</p>
Add recipe	<p>ERROR: monday.com did not return a valid webhook. Please try again later.</p> <p>This is a very technical error and can occur occasionally. Please try the same action again.</p>
During execution	<p>You have reached the complexity rate limit in monday.com, action will be retried in 1 minute. OR You have reached the complexity rate limit in monday.com, please retry later (give it a minute).</p> <p>The complexity rate limit is a restriction from the monday.com platform to safeguard against extensive use of API calls. The counter will be reset every 60 seconds. When you get this message you probably tried to change a number of values at one go using the multi select functionality.</p>