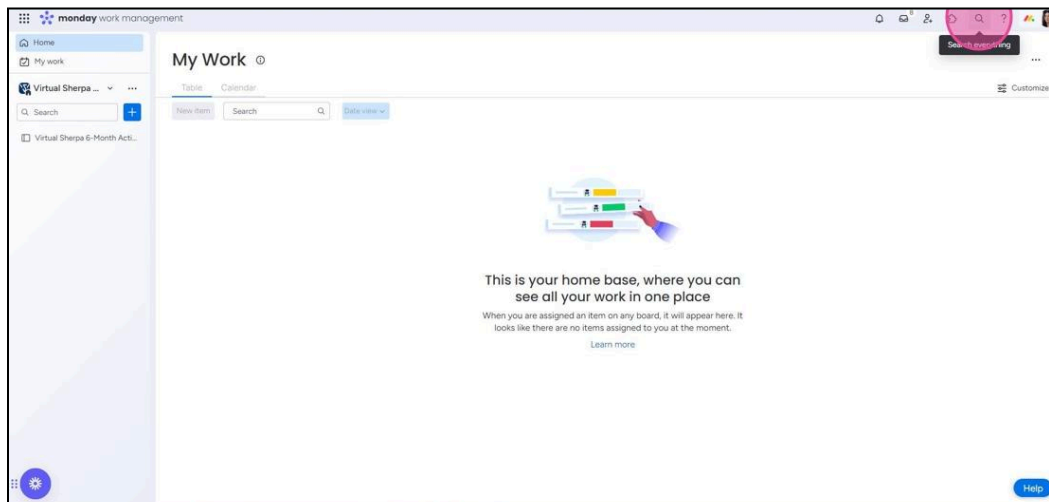


# Using Advanced Search and Filters in Monday.com

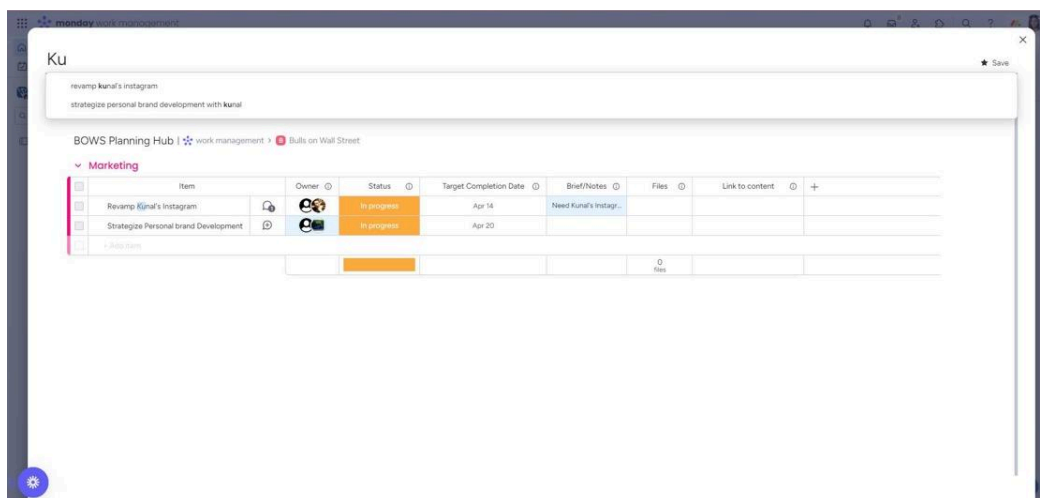
## Step 1: Accessing the Search Function

- **Log in to monday.com:** Use your credentials to access your monday.com account.
- **Navigate to the Search Bar:** The search bar is located at the top of the monday.com interface.

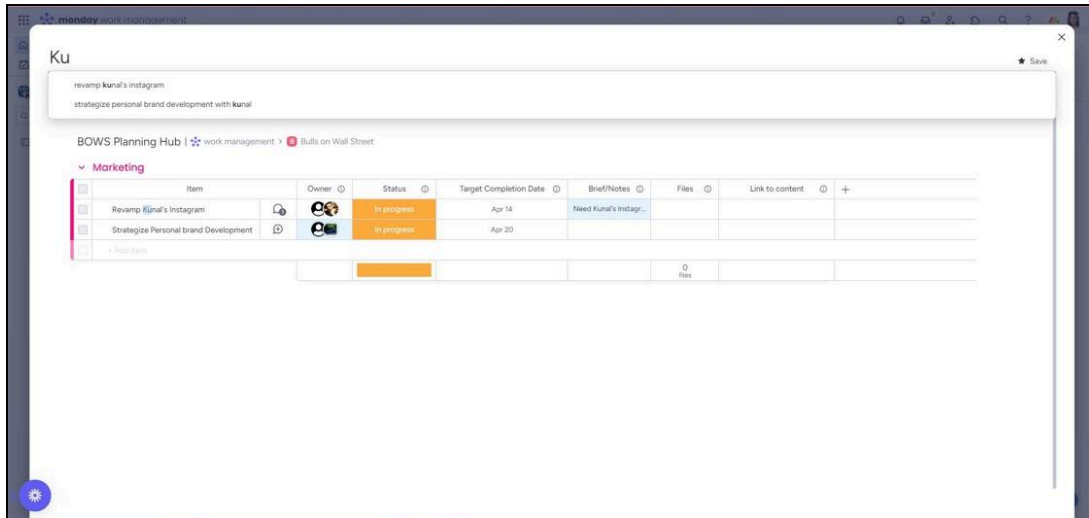


## Step 2: Performing a Basic Search

- **Enter Keywords:** Type relevant keywords or phrases into the search bar.

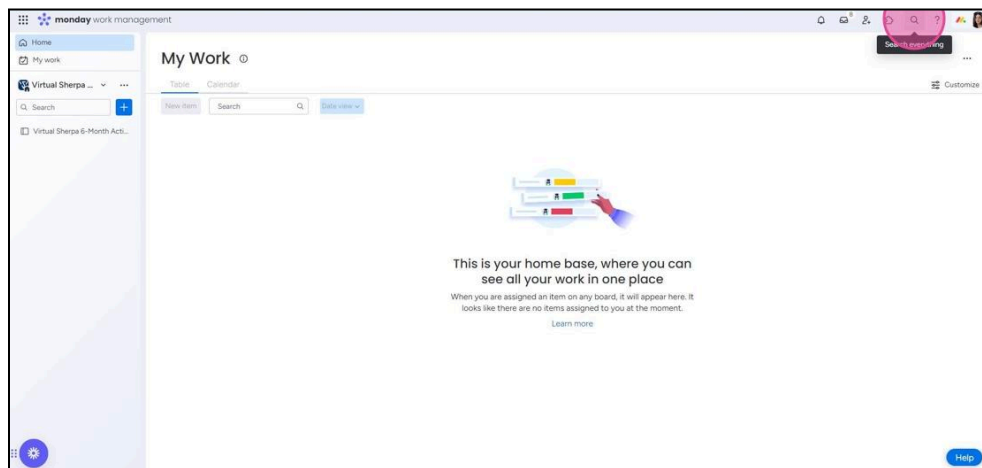


- **Review Results:** Scan the results that appear below the search bar. Results will include items, updates, and boards that match the keywords.



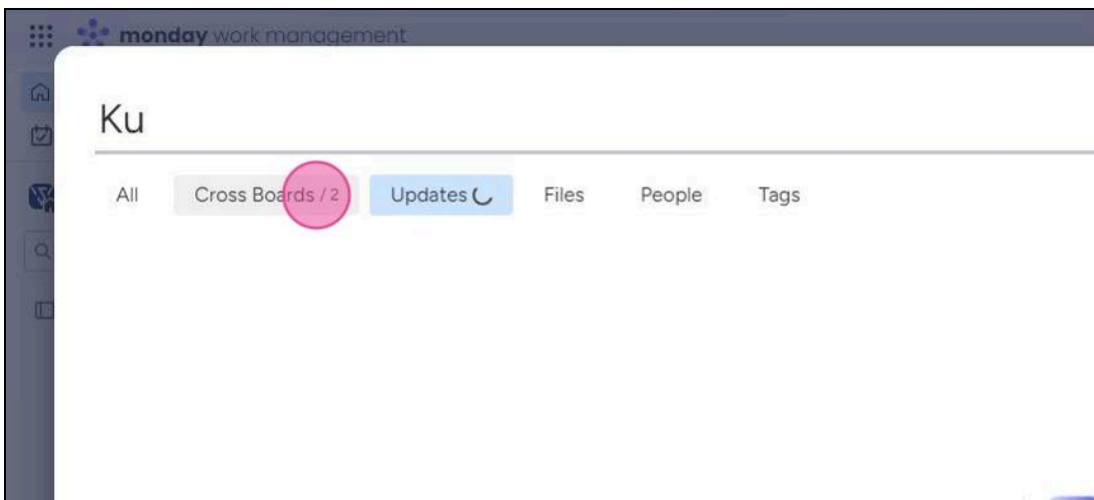
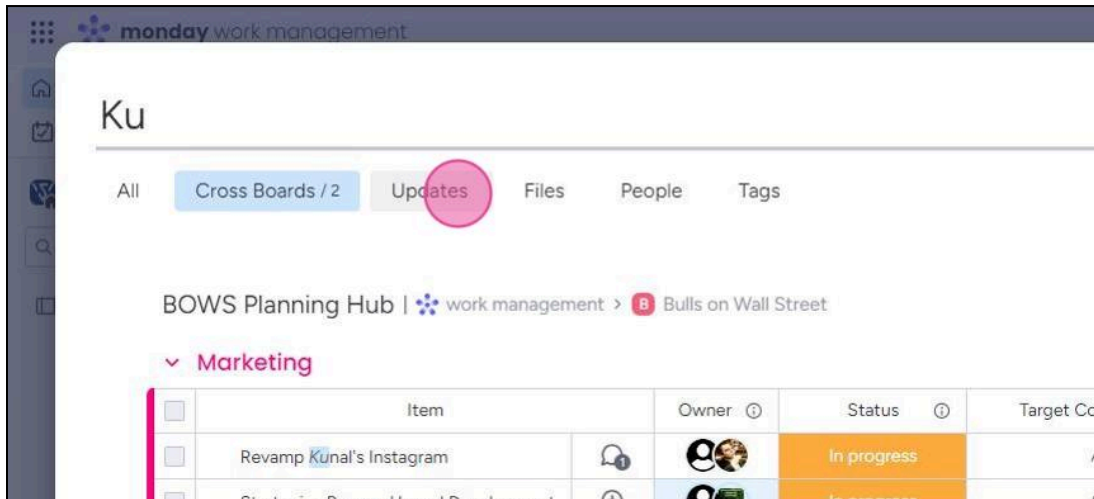
### Step 3: Using Advanced Search Filters

- **Open the Advanced Search Panel:** Click on the magnifying glass icon or press Enter after typing a keyword in the search bar to access advanced search options.



- **Apply Filters:** Use the filter options to narrow down the search results. Filter options may include:
  - **Boards:** Select specific boards to search within.
  - **Columns:** Choose specific columns to search data from.
  - **People:** Filter by team members assigned to tasks.
  - **Status:** Filter by task status (e.g., Done, In Progress).

- **Dates:** Use date filters to search within specific time frames (e.g., creation date, due date).



monday work management

## Ku

All Cross Boards / 2 Updates / 0 **Files** People Tags

BOWS Planning Hub | work management > Bulls on Wall Street

Marketing


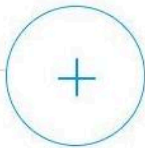
	Item	Owner	Status	Target Co
<input type="checkbox"/>	Revamp Kunal's Instagram		In progress	

monday work management

Cross Boards / 2 Updates / 0 Files **People** Tags

work management

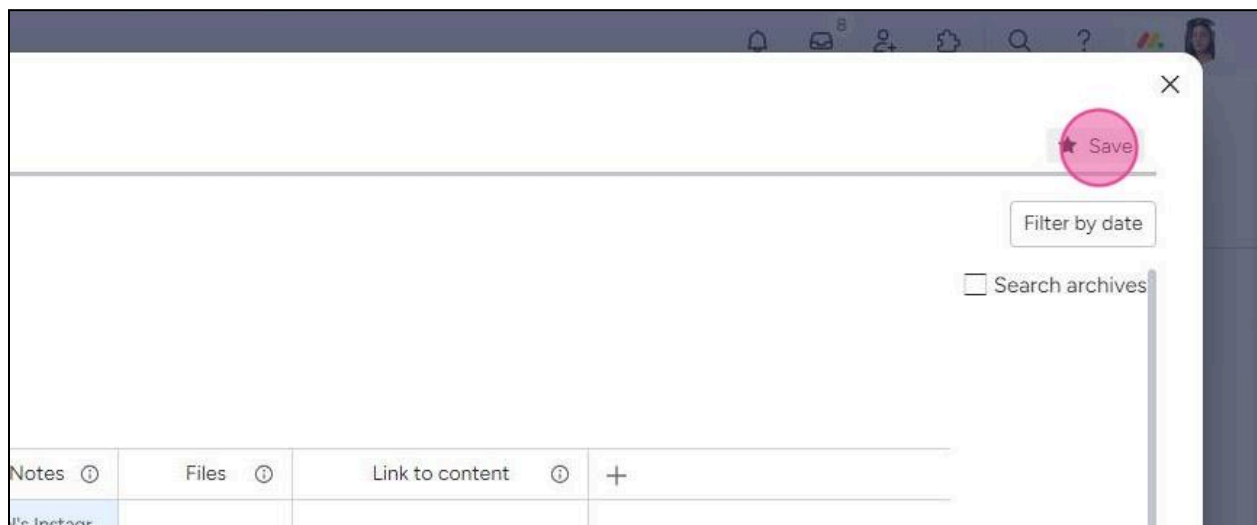
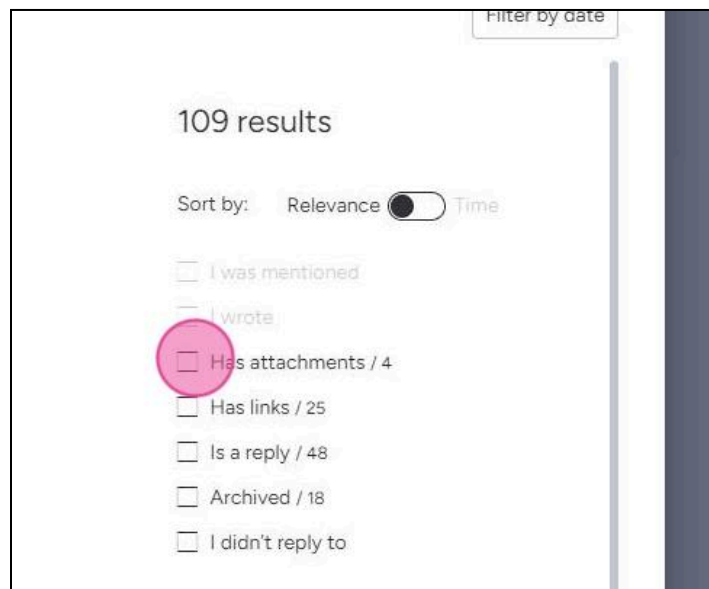
Cross Boards / 2 Updates / 0 Files **People** Tags

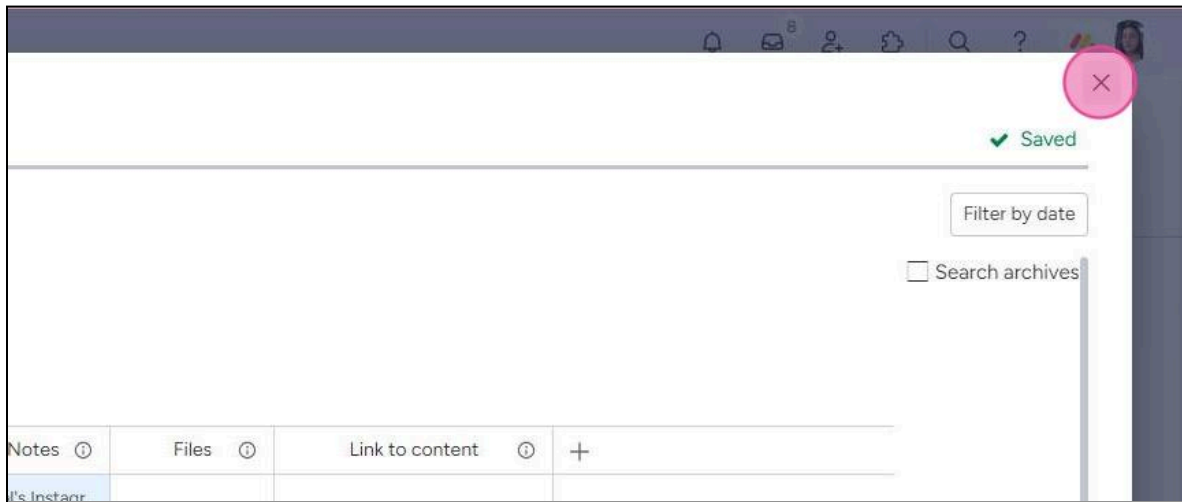



Kunal Desai

## Step 4: Customizing Filters for Precision

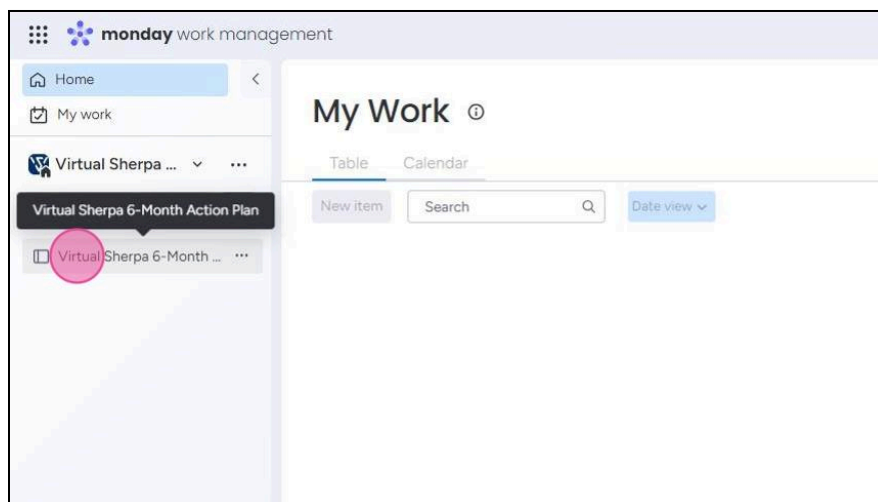
- **Combine Filters:** Apply multiple filters simultaneously to refine search results further. For example, search for tasks assigned to a specific person within a particular date range and status.
- **Save Filters:** If you use specific filters frequently, save them for quick access in the future. Click on "Save this search" or a similar option to store the filter configuration.



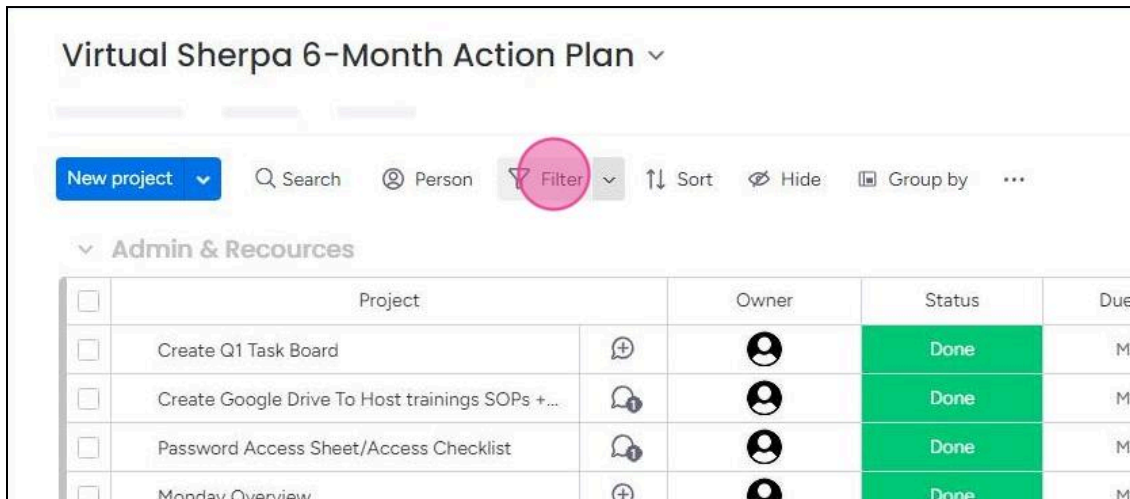


## Step 5: Using Board-Level Filters

- **Navigate to the Board:** Open the specific board you want to filter.



- **Click on the Filter Icon:** Located at the top of the board view.



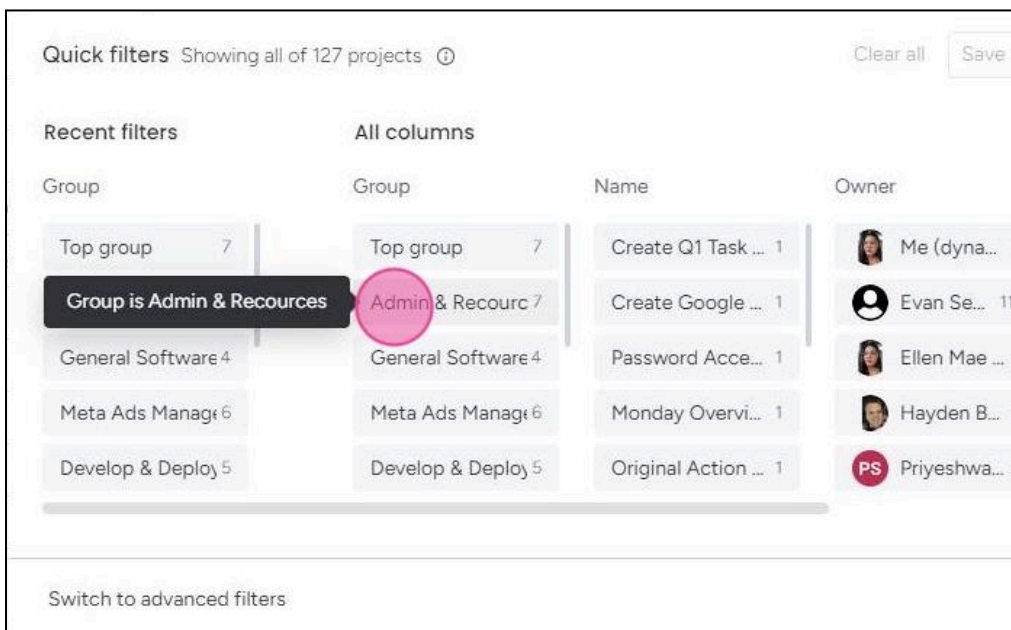
Virtual Sherpa 6-Month Action Plan ▾

New project ▾ 🔍 Search 👤 Person 🗑️ **Filter** ▾ ⬆️ Sort 🙋 Hide 📁 Group by ...

▾ Admin & Resources

<input type="checkbox"/>	Project		Owner	Status	Due
<input type="checkbox"/>	Create Q1 Task Board	+		Done	Ma
<input type="checkbox"/>	Create Google Drive To Host trainings SOPs +...	+		Done	Ma
<input type="checkbox"/>	Password Access Sheet/Access Checklist	+		Done	Ma
<input type="checkbox"/>	Monday Overview	+		Done	Ma

- **Apply Board-Specific Filters:** Use board-specific filter options to narrow down tasks. These options may include filtering by columns, groups, people, and other board-specific data.



Quick filters Showing all of 127 projects ⓘ Clear all Save

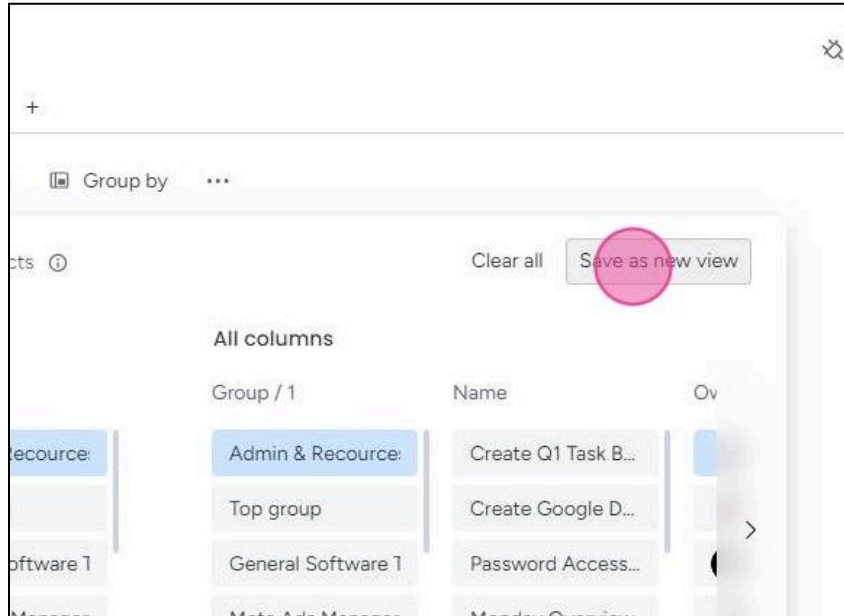
Recent filters All columns

Group	Group	Name	Owner
Top group 7	Top group 7	Create Q1 Task ... 1	Me (dyna... 5
<b>Group is Admin &amp; Resources</b>	<b>Admin &amp; Recourc 7</b>	Create Google ... 1	Evan Se... 11
General Software 4	General Software 4	Password Acce... 1	Ellen Mae ... 5
Meta Ads Manag 6	Meta Ads Manag 6	Monday Overvi... 1	Hayden B... 8
Develop & Deploy 5	Develop & Deploy 5	Original Action ... 1	PS Priyeshwa... 5

Switch to advanced filters



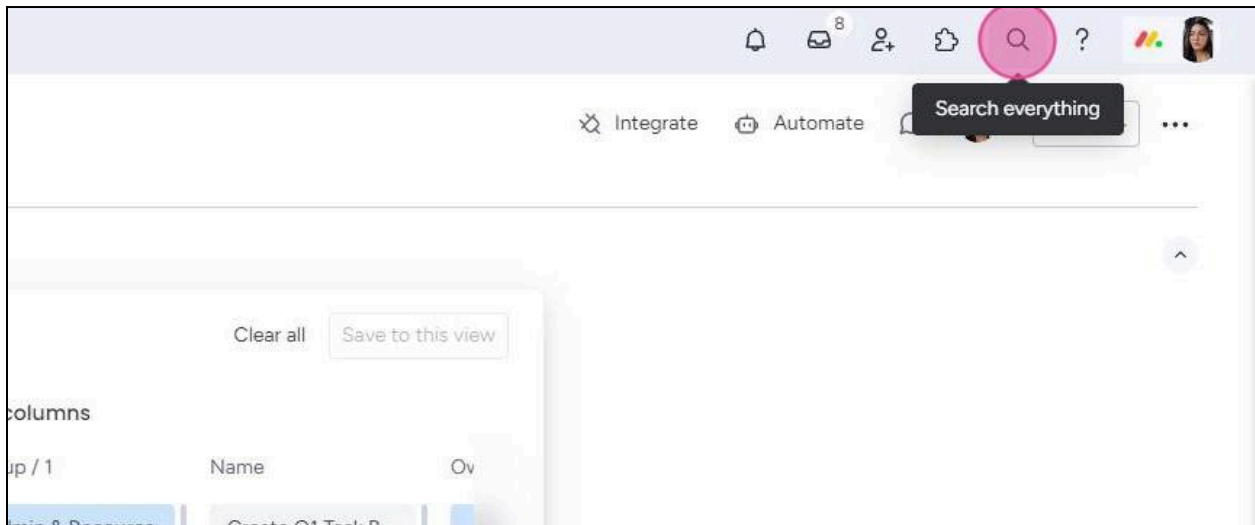
- **Save Board Filters:** Save the applied filters for consistent use. This is particularly useful for recurring reviews or reporting.



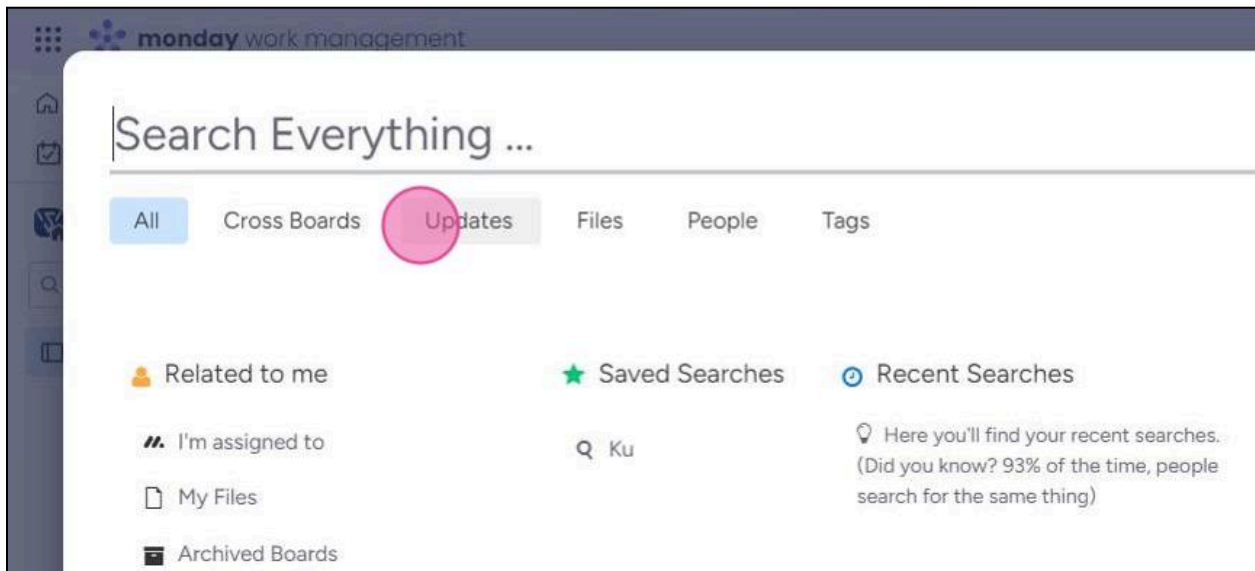


## Step 6: Searching Within Updates and Comments

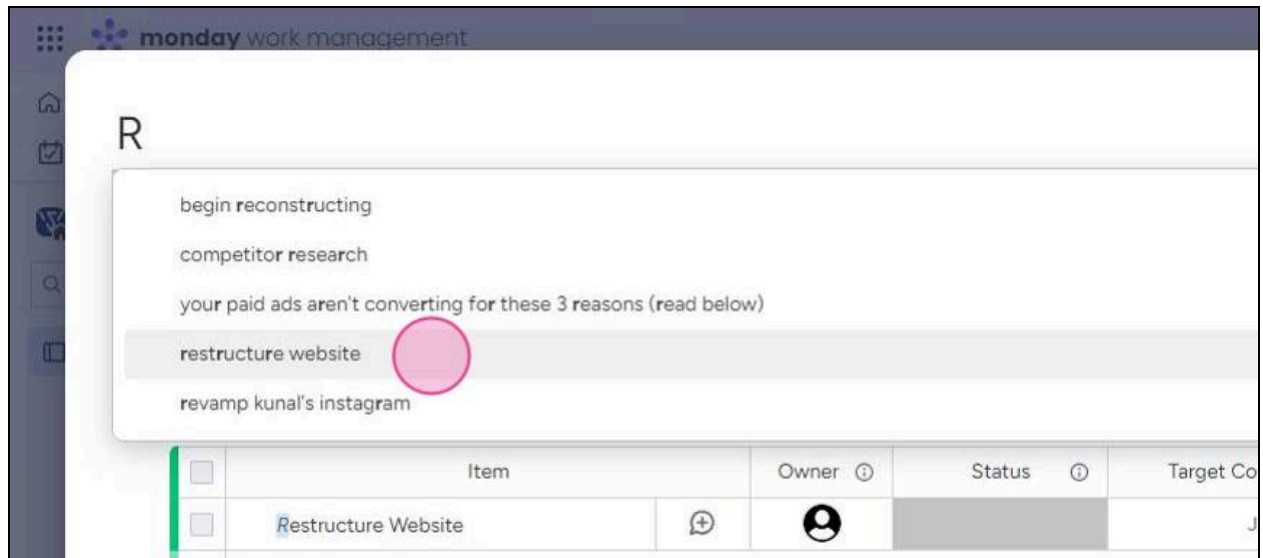
- **Open the Advanced Search Panel:** Click on the magnifying glass icon in the main search bar.



- **Select "Updates":** Choose the "Updates" tab to focus the search on comments and updates within tasks.



- **Enter Keywords or Phrases:** Type relevant keywords or phrases to find specific updates or comments.



- **Apply Filters:** Use filters to narrow down results based on time frames, people, or specific boards.

