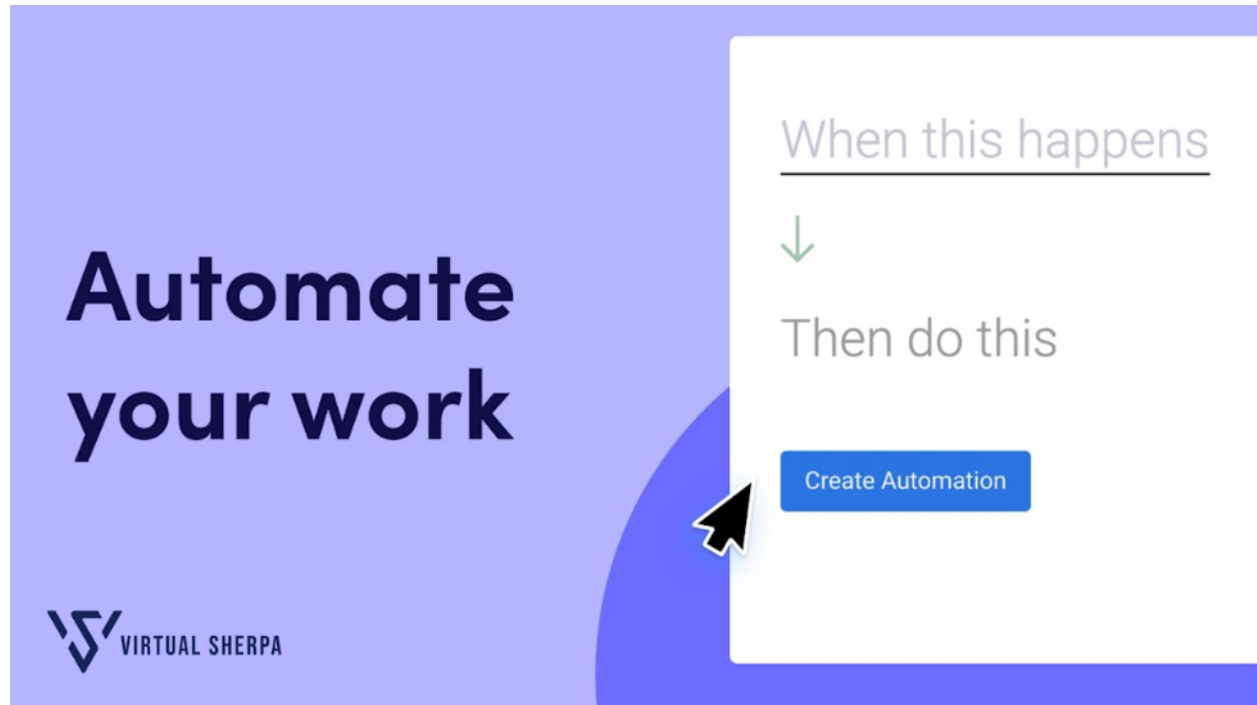

Managing Workflows with Automations in Monday.com



Are your team's workflows bogged down by repetitive tasks and inefficiencies? Monday.com offers a powerful solution with its advanced automation features. As a leading [work operating system](#), Monday.com helps teams save time, reduce errors, and streamline processes, allowing them to concentrate on what truly matters—delivering exceptional results.

This guide will dive deep into managing workflows with automations in Monday.com, exploring how to set up automations, the best practices for optimizing them, and advanced strategies for leveraging automations to enhance productivity.

Understanding Automations in Monday.com

Automations in Monday.com are essentially rules-based triggers that perform specific actions when certain conditions are met. They can automate repetitive tasks, such as updating statuses, sending notifications, or moving items between boards, which helps keep your workflows organized and efficient.

Key Benefits of Using Automations:

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- **Increased Efficiency:** Automations handle repetitive tasks, freeing up time for more critical work.
 - **Reduced Errors:** Automated processes minimize the risk of human error, ensuring tasks are completed consistently.
 - **Improved Collaboration:** Automations can notify team members when specific actions are required, [improving communication](#) and collaboration.
 - **Scalability:** Automations make it easier to scale operations by ensuring that processes are followed correctly as your team grows.

Mastering automations in Monday.com allows you to build a flexible workflow tailored to your team's needs, keeping everyone aligned and on task.

Getting Started with Automations in Monday.com

To begin automating your workflows in Monday.com, you first need to understand the basics of setting up automations. Here's a step-by-step guide:

1. Accessing the [Automation Center](#): Log in to your Monday.com account and navigate to the board where you want to set up an automation. Click on the "Automate" button located at the top right corner of the board. This will open the Automation Center, where you can create and manage your automations.

2. Exploring Automation Recipes: Monday.com offers a wide range of pre-built automation recipes that you can customize to fit your needs. These recipes cover various use cases, such as updating statuses, sending notifications, creating new items, and more.

- **Popular Automation Recipes:**
 - **When Status Changes to Something, Notify Someone:** This recipe is perfect for keeping team members informed about task progress.
 - **When Date Arrives, Notify Someone:** Use this recipe to send reminders for upcoming deadlines or events.
 - **When a New Item is Created, Assign Someone as Owner:** Automate task assignments by automatically assigning new items to specific team members.

Start with pre-built recipes to get a feel for how automations work and then customize them as needed to fit your specific workflow.

3. Creating Custom Automations: If you can't find a pre-built recipe that fits your needs, you



can create a custom automation. Click on “Create Custom Automation” and select a trigger (e.g., “When status changes to”) and an action (e.g., “Move item to group”).

- **Triggers:** These are the conditions that start the automation. Examples include “When status changes,” “When date arrives,” or “When an item is created.”
- **Actions:** These are the tasks that are performed when the trigger condition is met. Examples include “Send notification,” “Move item,” or “Change status.”

Think through the workflow you want to automate before creating a custom automation. This helps ensure that you select the right triggers and actions to achieve your desired outcome.

Optimizing Automations for Workflow Management

To maximize the benefits of automations, it’s essential to optimize them for your specific workflow. Here are some best practices to consider:

1. Keep Automations Simple and Focused: While it can be tempting to create complex automations with multiple [triggers](#) and actions, it’s often better to keep them simple and focused. This makes it easier to manage and troubleshoot your automations.

- **Single-Trigger Automations:** Start with automations that have a single trigger and a single action. For example, “When status changes to ‘Done,’ move item to ‘Completed’ group.”
- **Avoid Overlapping Automations:** Ensure that your automations do not overlap or conflict with each other, as this can create confusion and lead to unintended actions.

Use descriptive names for your automations to make it easy to understand their purpose at a glance. This is especially helpful as your list of automations grows.

2. Test Your Automations Thoroughly: Before rolling out a new automation, test it thoroughly to ensure that it works as expected. This helps prevent errors and ensures that your automation enhances your workflow rather than disrupting it.

- **Test in a Controlled Environment:** Use a separate board or a test group to test your automation before applying it to a live board.
- **Monitor Automation Logs:** Monday.com provides logs for each automation, showing when they were triggered and what actions were performed. Use these logs to identify

any issues and make adjustments as needed.

3. Use Conditional Automations for Greater Flexibility: Conditional automations allow you to add conditions to your automations, giving you greater control over when and how they are triggered.

- **Conditional Triggers:** For example, you can set an automation to trigger only if the task is assigned to a specific person or if the due date is within a certain range.
- **Multiple Conditions:** Combine multiple conditions to create more complex automations that fit your specific workflow needs.

Use conditional automations to create dynamic workflows that adapt to changing circumstances and ensure that tasks are handled appropriately.

Advanced Automation Strategies in Monday.com

For teams looking to take their automation skills to the next level, here are some advanced strategies for managing workflows with automations in Monday.com:

1. Automating Cross-Board Workflows: [Cross-board automations](#) allow you to automate workflows that span multiple boards, making it easier to manage complex projects that involve multiple teams or departments.

- **Move or Copy Items Between Boards:** Set up an automation to move or copy items from one board to another when specific conditions are met. For example, “When status changes to ‘Ready for Review,’ move item to ‘Review Board.’”
- **Sync Updates Across Boards:** Keep multiple boards in sync by setting up automations that update items on different boards when changes are made. For example, “When status changes to ‘In Progress’ on ‘Development Board,’ update status to ‘In Development’ on ‘Main Board.’”

Use cross-board automations to create a unified workflow that ensures all teams are aligned and working towards the same goals.

2. Using Integrations to Enhance Automations: [Integrations](#) allow you to connect Monday.com with other tools and apps, extending the functionality of your automations and streamlining your workflow.

- **Slack Integration:** Set up automations that send Slack notifications when certain actions are performed in Monday.com. For example, “When a task is overdue, send a Slack message to the ‘Project Team’ channel.”
- **Google Calendar Integration:** Automatically create calendar events based on dates in Monday.com. For example, “When a task is assigned, create a calendar event for the due date.”

3. Creating Automation Sequences: Automation sequences allow you to create a series of automations that are triggered in a specific order, creating a more streamlined workflow.



- **Sequential Actions:** For example, you can set up an automation sequence that moves a task to the “In Progress” group when it’s assigned, updates the status to “In Review” when it’s completed, and then moves it to the “Completed” group when it’s approved.
- **Chained Automations:** Chain multiple automations together to create a more complex workflow. For example, “When status changes to ‘Done,’ notify the team, move the item to ‘Completed,’ and send a summary email to the project manager.”

Use automation sequences to automate entire workflows from start to finish, reducing the need for manual intervention and ensuring consistency.

Best Practices for Managing Automations in Monday.com

To get the most out of your automations, it’s important to follow some best practices for managing them effectively:

1. Regularly Review and Update Automations: Automations should not be set and forgotten. Regularly review your automations to ensure they are still relevant and working as intended.

- **Check [Automation Logs](#):** Use the automation logs to monitor the performance of your automations and identify any issues that need to be addressed.
- **Update as Needed:** Make adjustments to your automations as your workflow evolves or as new features are added to Monday.com.

2. Use Automation Templates for Consistency: Automation templates allow you to create standardized automations that can be easily replicated across different boards or projects.

- **Create Templates for Common Workflows:** Identify common workflows in your organization and create automation templates that can be used across multiple boards.
- **Share Templates with Your Team:** Share automation templates with your team to ensure consistency and make it easier for team members to set up automations on their boards.

3. Dashboards to Monitor Automations: [Dashboards](#) provide a high-level overview of your workflows and can be used to monitor the performance of your automations.

- **Automation Widgets:** Use automation widgets on your dashboard to display key metrics, such as the number of times an automation has been triggered or the number of tasks completed by automation.
- **Custom Dashboards:** Create custom dashboards that aggregate data from multiple boards to gain a comprehensive view of your workflows and automation performance.

Use dashboards to keep track of your automations and identify any areas that need improvement. This helps ensure that your automations are contributing to your overall productivity and workflow efficiency.

Conclusion



Harnessing the power of automations in Monday.com is an effective strategy for boosting productivity, minimizing errors, and streamlining your operations. By learning the fundamentals of automations, tailoring them to fit your unique needs, and applying advanced techniques, you can develop a dynamic and efficient workflow that aligns with your team's objectives and drives success.