Monday.com Tips & Tricks

◆ Best Practices Board

◆ Board Filters & Views

◆ Meeting Best Practices
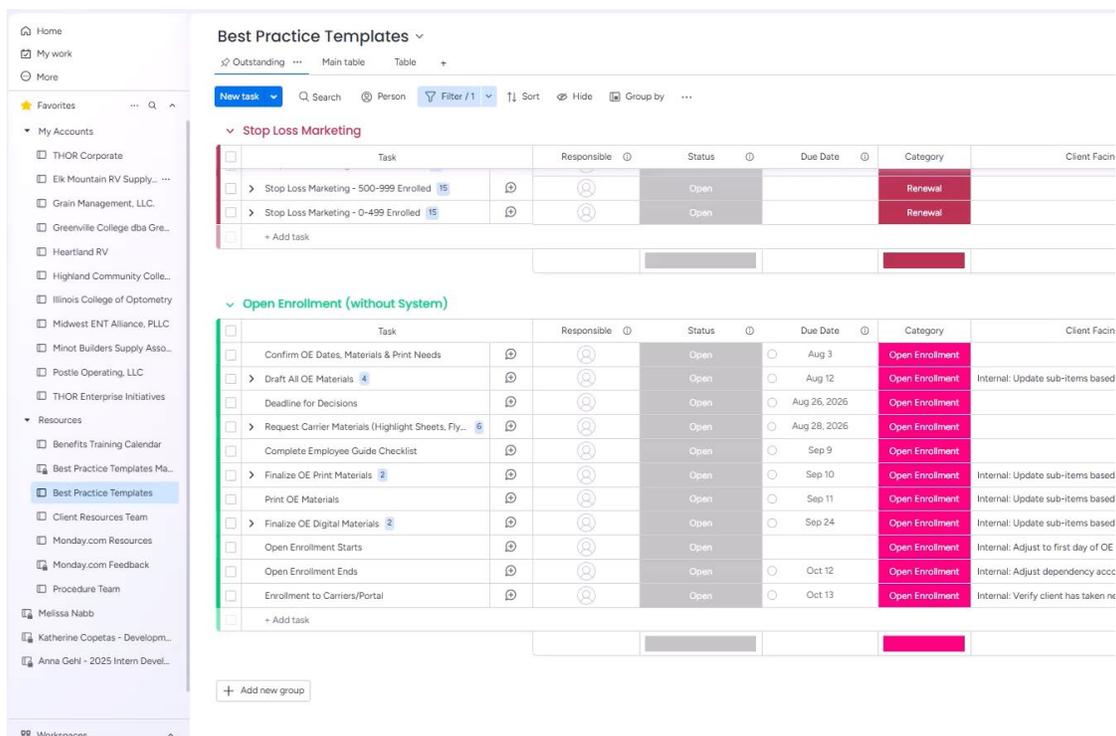
◆ Tracking Future Considerations

![monday.com logo]

Best Practices Board

Use the best practices board to easily add already built procedures to your board!

Adding Doc Search Pro to Client Boards

- Navigate to the best practices board
- Click the check box to the left of the workflow (or entire group) you want to copy
- Click "duplicate", and "duplicate with updates"
- This will duplicate the selected items with the word (copy) behind them
- Click "move to" and "move to board"
- Select which board and then which group you would like the items moved to (hit continue if a pop up comes up)
- These items will now be available on your board

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Board Filters and Views

Add filters and views to your boards to make drill down to specific items

Adding Filters

- Example: Filter down to overdue and due this week
- Click the "filter" button and "new group"
    - Change "column" to "due date"
    - Change "condition" to "in the next"
    - Click "overdue" and "this week"
    - Do the same steps above but now for the sub items. Overdue is "past dates" in subitems
      (Note: there is the sub item symbol to help differentiate these once the filter is applied)
- Click "Save to this view"
- To remove the filter, click the x to the right of the filters
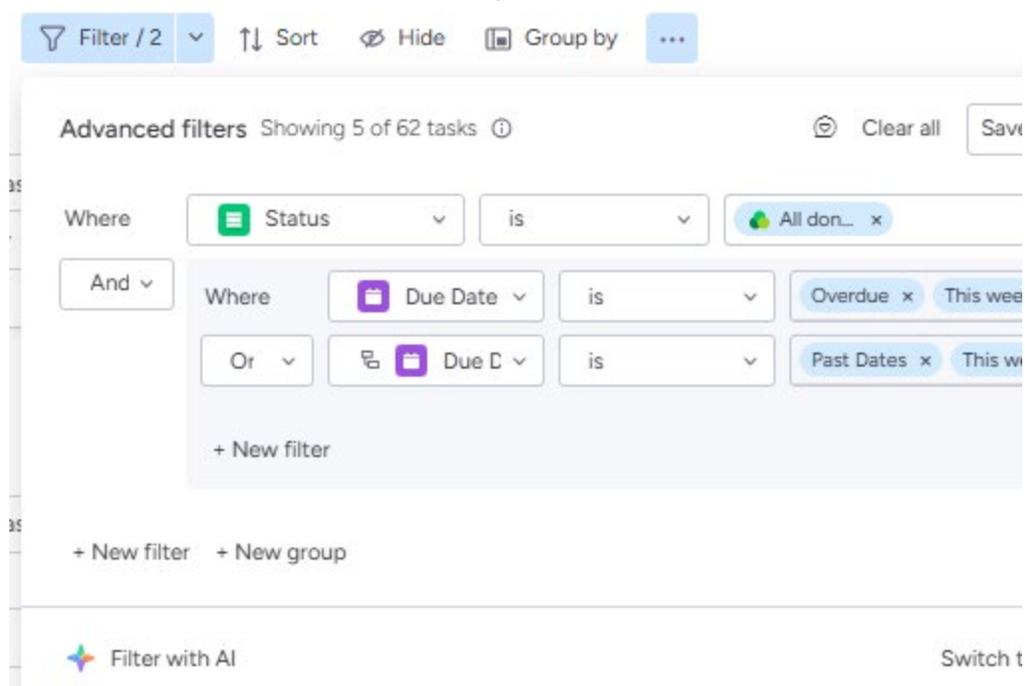
Adding Views

- Views allow you to visualize your board's information in multiple different ways, and with different filters applied. You can make as many different views as you want!
- Example: Add a view for your "Agenda Items" for your upcoming client call
- Click the "+" to the right of "Main Table" and select "Table"
    - This will be a replica of your "outstanding" board
    - Rename the View by clicking the three dots to the right of "table"
    - Add a filter by the steps above where "column" is "status" and the far right drop down is "agenda item"
    - Click "save to this view"
- Tip: You can add a filter to a view containing key words. See example below for adding the key words "monthly call" as an additional filter.
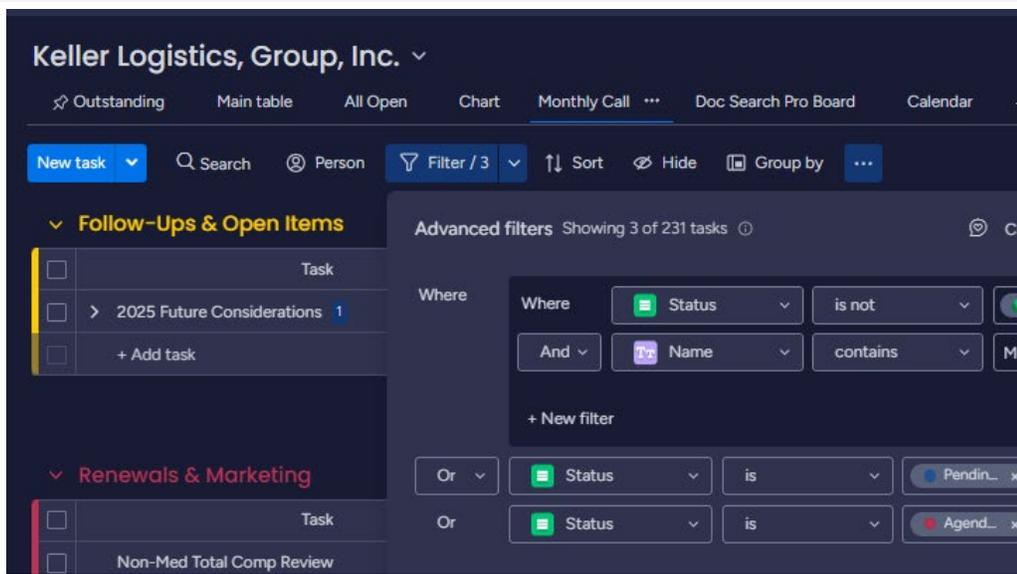
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Filters

Illinois College of Optometry

Task		Responsible	Status	Due Date	Category	Client
> Client Notes 2			Open		WSTL	
Year-End/Mid-Year Meeting Follow-Ups			Open	Jun 27	WSTL	
5500s for Illinois College of Optometry			Pending Carrier Action	May 2	Compliance	
Optum Rebate Reporting			Pending Carrier Action	May 23	Client Service	
FW: ICO - Audit Request Documentation			Open	May 26	Client Service	
Test Item 1			In Progress	May 29	Client Service	
Test Item 2			In Progress	May 30	Client Service	
Test Item 3			In Progress	May 31	Client Service	
+ Add task						

WSTL

Task		Responsible	Status	Due Date	Category	Client
> Monthly Reporting 12			In Progress	Jan 31, 2026	WSTL	
Year-End Checklist			Open	Feb 28	WSTL	
Pre-Renewal/Renewal Meeting Follow-Ups			Open		WSTL	
> Pre-Renewal/Renewal Meeting 3			Open	Oct 18	WSTL	
> Year-End/Mid-Year Meeting 3			Open	Jun 24	WSTL	
+ Add task						

Views

Illinois College of Optometry

Emailed items

Task		Responsible	Status	Due Date	Category
Illinois College of Optometry Census			Completed		Renewal
+ Add task					

Follow-Ups & Open Items

Task		Responsible	Status	Due Date	Category
> Biometric Screening Quote 1			Completed		
Meeting Notes			Completed		
SF Budgeting Tool			Completed	Sep 9, 2024	
ICO Monthly report			Completed	Sep 20, 2024	Analytics
ICO Lag Report Through August			Completed	Sep 20, 2024	
ICO Monthly - Adding Dental			Completed	Nov 6, 2024	Analytics
Automated Monthly Report Errors			Completed	Jan 17	Analytics
Comm Request - Video Assistance			Completed	Jan 21	Communications
UMR Portal Access			Completed		Other
Optum Rx Savings Review			Completed	May 15	Pharmacy
ICO Monthly Reporting Debug Error			Completed	May 27	Analytics
+ Add task					

Meeting Best Practices

Preparing for a Meeting

- Use sub items to help manage tasks for upcoming meetings
  - Examples: pulling carrier reports, running tools (you can list all tools as a checklist in the comments bubble), requesting ipads, printing copies

Managing Meeting Follow Ups

- There is a task on your boards for the core meeting's "follow ups"
  - Enter your actionable meeting follow ups as sub items underneath this task
- Reminder: all WSTL meeting notes will be stored in the workdoc saved on the "WSTL notes" sub item under "client notes"

- You can convert your notes from your workdoc to a task easily
  - Highlight the note from your workdoc you would like to make a task
  - Click the +Item Icon that shows up
  - Pick which board and group you want this task on

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Tracking Future Considerations

Use a "Future Considerations" task for strategies to revisit down the road

Managing Future Considerations

- Add a new task in "Follow Ups & Open Items"
- Enter sub-items for each future consideration to revisit
- This is a great spot to store follow ups from core WSTL meetings that aren't being immediately looked at, but are still on the docket to be discussed in later meetings