

GenieTools - Technical Manual

Introduction

GenieTools is an app for Monday.com that helps you automate repetitive tasks on your dashboards. With GenieTools, you can copy data across different types of columns, clean up duplicate items, assign people automatically, and much more — without writing formulas or building complex integrations.

Standard Column Copy

It easily copies the value from a standard column to a target column on your board.

➡ Supported columns (Source): Status, Text, Connect boards, Number, Long text, Link, Location, Dropdown, Email

➡ Supported columns (Target): Status, Text, Number, Long text, Link, Dropdown

Some not supported columns yet: Location (target), Email (target) People

How to set it up:

- Open your Monday.com board.
- Go to Automations > Add to Board.
- Select the GenieTools app.
- Choose the 'Standard Copy' action.
- Define the source column (e.g. Status) and the target column.
- Save and test the automation.

Available triggers

When an item is created
Copy **Source Column** to
Target Column [Standard
Copy]

Use template

When **person** is assigned
Copy **Source Column** to
Target Column [Standard
Copy]

Use template

When **button** clicked Copy
Source Column to **Target
Column** [Standard Copy]

Use template

Item Name Copy

Copy the item's name into a target column or copy a column value into the item's name.

→ Supported columns (Source): Status, Text, Long text, Link, Dropdown

→ Supported target columns: Status, Text, Connect boards, Numbers, Long text, Link, Location, Dropdown, Email

How to set it up:

- Open your board and add a GenieTools automation.
- Select 'Item Name Copy'.
- Choose whether to copy FROM the item name into a column or TO the item name.
- Define the target column to be renamed by the Item Name or the source column that will be copied to the Item Name.
- Save and test the automation.

Available triggers

When status changes Copy Item Name to Target Column [ITEM NAME COPY]	When item name changes Copy Item Name to Target Column [ITEM NAME COPY]	When an item is moved to this board Copy Item Name to Target Column [ITEM NAME COPY]		
Use template	Use template	Use template		
When button clicked Copy Item Name to Target Column [ITEM NAME COPY]	When person is assigned Copy Item Name to Target Column [ITEM NAME COPY]	When an item is moved to this board Copy Column Source to Item Name	When an item is moved to group Copy Column Source to Item Name	When column changes Copy Item Name to Target Column [ITEM NAME COPY]
Use template	Use template	Use template	Use template	Use template
When an item is created Copy Column Source to Item Name	When button clicked Copy Source Column to Item Name [COPY to ITEM NAME]	When person is assigned Copy Source Column to Item Name [COPY to ITEM NAME]	When an item is created Copy Item Name to Target Column [ITEM NAME COPY]	When status changes to something Copy Item Name to Target Column [ITEM NAME COPY]
Use template	Use template	Use template	Use template	Use template
When status changes Copy Source Column to Item Name [COPY to ITEM NAME]	When column changes Copy Source Column to Item Name [COPY to ITEM NAME]	When status changes to something Copy Source Column to Item Name [COPY to ITEM NAME]	When status changes from something to something Copy Source Column to Item Name [COPY to ITEM NAME]	
Use template	Use template	Use template	Use template	

Item ID Copy

Copy the unique Item ID into a target column for referencing or integrations.

➡ Supported target columns: Short text, Long text, Number

How to set it up:

- Add a GenieTools automation.
- Select 'Item ID Copy'.
- Define the target column (Text/Number).
- Save and test the automation.

Available triggers

When button clicked Copy ItemID to Target Column [ITEM ID COPY] Use template	When column changes Copy ItemID to Target Column [ITEM ID COPY] Use template	When person is assigned Copy ItemID to Target Column [ITEM ID COPY] Use template	
When an item is moved to this board Copy ItemID to Target Column [ITEM ID COPY] Use template	When status changes Copy ItemID to Target Column [ITEM ID COPY] Use template	When an item is created Copy ItemID to Target Column [ITEM ID COPY] Use template	When status changes to something Copy ItemID to Target Column [ITEM ID COPY] Use template

Formula Copy

Copy the calculated value from a Formula column (using its column ID) into a local column.

➡ Supported target columns: Status, Text, Numbers, Long text, Link, Dropdown, Email

Please note that:

- The copied ID must be the same as the source formula column (no spaces before and after the ID)
- If formula contains mirrored or connected columns references (example: if conditions) copied result might be “null”

How to set it up:

- Locate the Formula column and its ID (check below “How to find Column ID section”).
- Add a GenieTools automation and select 'Formula Copy'.
- Enter the Formula column ID as the source (no spaces).
- Choose a local column (Text/Number) as destination.
- Save and test the automation.

Available triggers

When button clicked Copy Formula [ID] to Target Column [Formula Copy]	When status changes Copy Formula [ID] to Target Column [Formula Copy]	When column changes Copy Formula [ID] to Target Column [Formula Copy]		
Use template	Use template	Use template		
When person is assigned Copy Formula [ID] to Target Column [Formula Copy]	When status changes to something Copy Formula [ID] to Target Column [Formula Copy]	When status changes from something to something Copy Formula [ID] to Target Column [Formula Copy]	When an item is created Copy Formula [ID] to Target Column [Formula Copy]	When an item is moved to this board Copy Formula [ID] to Target Column [Formula Copy]
Use template	Use template	Use template	Use template	Use template

Mirror Copy

Copy values from a Mirror column (using its column ID) into a local column.

➡ Supported mirror columns: Status, Numbers, Long text, People, Text, Link, Dropdown

Please note that:

- The copied ID must be the same as the source column (no spaces before and after the ID)
- For People column, team or user must be invited in target board

How to set it up:

- Identify the Mirror column and its column ID (check below “How to find Column ID section”).
- Add a GenieTools automation and select 'Mirror Copy'.
- Enter the Mirror column ID as source.
- Select a destination column compatible with the Mirror value.
- Save and test the automation.

Available triggers

When status changes to something copy Mirror column [ID] to Target Column [Mirror Copy]	When status changes copy Mirror column [ID] to Target Column [Mirror Copy]	When status changes from something to something copy Mirror column [ID] to Target Column [Mirror Copy]	
Use template	Use template	Use template	
When button clicked copy Mirror column [ID] to Target Column [Mirror Copy]	When column changes copy Mirror column [ID] to Target Column [Mirror Copy]	When an item is moved to this board copy Mirror column [ID] to Target Column [Mirror Copy]	When an item is created copy Mirror column [ID] to Target Column [Mirror Copy]
Use template	Use template	Use template	Use template

Remove (Copy) Suffix

Automatically remove the '(copy)' suffix from duplicated items when they are created.

→ Works with all item names.

How to set it up:

- Add a GenieTools automation.
- Select 'Remove Copy Suffix'.
- Enable the rule to automatically clean duplicated names.

Example:

When duplicating tasks, GenieTools removes the '(copy)' tag for cleaner reporting.

Available triggers

When an item is created
Removes "(copy)" from item
name

Use template

Auto Assign

Automatically assign people based on a master source table.

→ Works only with People column.

COMING SOON: texto, link, status, dropdown, email, people, long text

Please note that:

- Team (even sub-teams) or user must be invited in source and target board

How to set it up:

- Prepare a master source table with rules (e.g. client -> responsible person).
- Add a GenieTools automation and select 'Auto Assign'.
- Define the mapping between the source value and the assignee.
- Save and test.

Example:

Automatically assign incoming tickets to the right agent based on ticket type.

Available triggers

When **column** changes
Update **People Column** based
on **Source Board**

Use template

When an item is created
Search in **Column** and update
People Column based on
Source Board

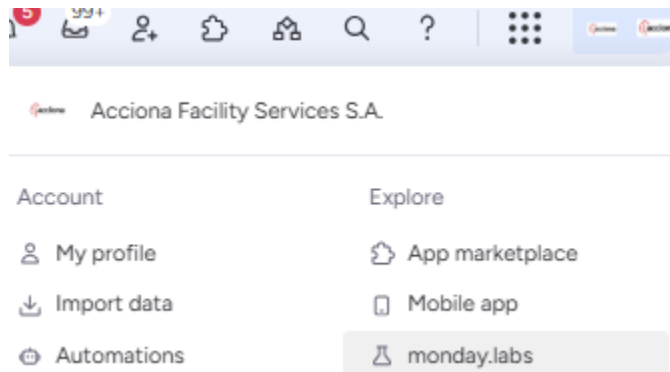
Use template

FAQs

How to find a column ID

URL Monday donde lo explica

To access the column IDs you must enable first the Developer Mode through *Monday.labs*, accessible while clicking on your account icon:



monday.labs



monday.labs is a platform for developers to build and share apps that extend the monday.com platform.

Developer mode

Status: Beta

See template IDs, column IDs and more (to use with our API v2)

