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]
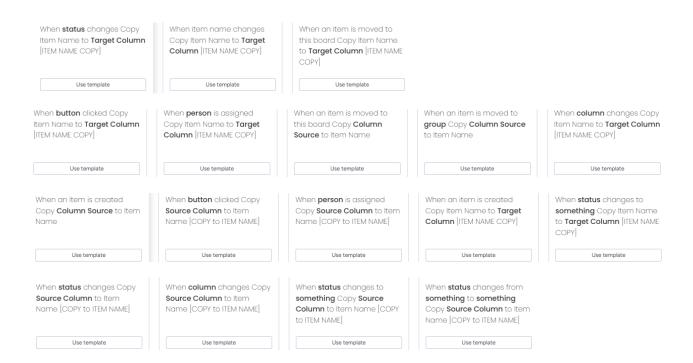
Use template

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

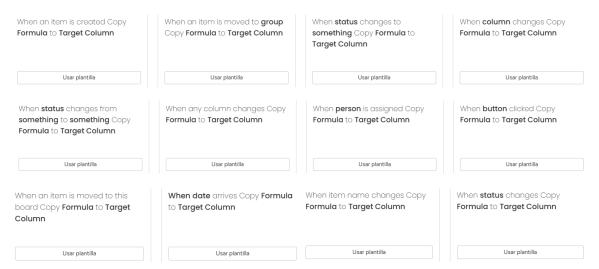Copy the calculated value from a Formula column into a local column.

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

Please note that:

- If formula contains mirrored or connected columns references (example: if conditions) casted result might be "null"

How to set it up:

- Add a GenieTools automation and select 'Formula Copy'.

- Choose the source Formula column.

- Choose a local column (Text/Number) as destination.

- Save and test the automation.

Available triggers

When an item is created Copy **Formula** to **Target Column**	When an item is moved to **group** Copy **Formula** to **Target Column**	When **status** changes to **something** Copy **Formula** to **Target Column**	When **column** changes Copy **Formula** to **Target Column**
Usar plantilla	Usar plantilla	Usar plantilla	Usar plantilla
When **status** changes from **something** to **something** Copy **Formula** to **Target Column**	When any column changes Copy **Formula** to **Target Column**	When **person** is assigned Copy **Formula** to **Target Column**	When **button** clicked Copy **Formula** to **Target Column**
Usar plantilla	Usar plantilla	Usar plantilla	Usar plantilla
When an item is moved to this board Copy **Formula** to **Target Column**	**When date** arrives Copy **Formula** to **Target Column**	When item name changes Copy **Formula** to **Target Column**	When **status** changes Copy **Formula** to **Target Column**
Usar plantilla	Usar plantilla	Usar plantilla	Usar plantilla

Mirror Copy

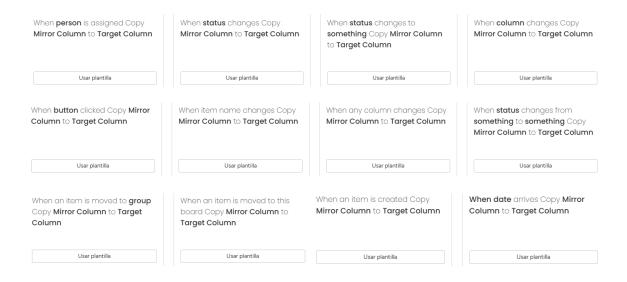Copy values from a Mirror column into a local column.

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

Please note that:

- For People column, team or user must be invited in target board

How to set it up:

- Add a GenieTools automation and select 'Mirror Copy'.

- Choose the source Mirror column.

- Select a destination column compatible with the Mirror value.

- Save and test the automation.

Available triggers

When **person** is assigned Copy **Mirror Column** to **Target Column**	When **status** changes Copy **Mirror Column** to **Target Column**	When **status** changes to **something** Copy **Mirror Column** to **Target Column**	When **column** changes Copy **Mirror Column** to **Target Column**
Usar plantilla	Usar plantilla	Usar plantilla	Usar plantilla
When **button** clicked Copy **Mirror Column** to **Target Column**	When item name changes Copy **Mirror Column** to **Target Column**	When any column changes Copy **Mirror Column** to **Target Column**	When **status** changes from **something** to **something** Copy **Mirror Column** to **Target Column**
Usar plantilla	Usar plantilla	Usar plantilla	Usar plantilla
When an item is moved to **group** Copy **Mirror Column** to **Target Column**	When an item is moved to this board Copy **Mirror Column** to **Target Column**	When an item is created Copy **Mirror Column** to **Target Column**	When **date** arrives Copy **Mirror Column** to **Target Column**
Usar plantilla	Usar plantilla	Usar plantilla	Usar plantilla

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.

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