

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

Easily copy 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, People, Button, Date

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

How to set it up:

- Open your Monday.com board.
- Go to Automations > Create automation.
- Choose a trigger.
- Select the 'Standard Copy' action.
- Define the Source Column and the Target Column.
- Create and test the automation.

Use case:

When a Status changes to “Approved”, automatically copy that value into another Status column used for reporting.

Action

Then Copy Source Column to Target Column

Item ID Copy

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

➡ Supported columns (Target): Short text, Long text, Number,

How to set it up:

- Open your Monday.com board.
- Go to automations > Create automation.
- Choose a trigger.
- Select 'Item ID Copy'.
- Define the Target Column.
- Create and test the automation.

Use case:

Store the Item ID in a column to use it in external integrations, automations, or references between boards.

Action

Then copy Item ID to Target Column

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 Monday.com board.
- Go to automations > Create automation.
- Choose a trigger.
- Select 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.
- Create and test the automation.

Use case:

Automatically save the item name into a column for reporting or rename the item using the value of another column.

Actions

Then Copy Item Name to Target Column

Then Copy from Source Column to Item Name

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:

- Open your Monday.com board.
- Go to automations > Create automation.
- Choose a trigger.
- Select 'Formula Copy'.
- Define the Formula and the Target Column.
- Create and test the automation.

Use case:

Automatically store calculated results from a Formula column into a regular column so they can be used in automations, integrations, filters, or reporting.

Action

Then Copy Formula to Target Column

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:

- Open your Monday.com board.
- Go to automations > Create automation.
- Choose a trigger.
- Select 'Mirror Copy'.
- Define the Mirror Column and the Target Column.
- Create and test the automation.

Use case:


Copy mirrored data into a local column to avoid dependency on connected boards and improve performance.

Action

Then Copy from Mirror Column to Target Column

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:

- Open your Monday.com board.
- Go to automations > Create automation.
- Choose a trigger.
- Select 'Remove (copy) Suffix'.
- Save and test the automation.

Example:

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

Use case:

Automatically clean item names after duplication to keep consistent naming conventions

Action

Then Remove "(copy)" from duplicated Items

Auto Assign

Automatically assign values based on a master source table.



Supported source columns:

Status, Email, Text (short & long), Number, Link, Dropdown, People

Please note that:

- Team (even sub-teams) or users must be invited in source and target boards
- The source board must contain the mapping rules used for the assignment.
- The value searched in the source column must match the value defined in the source board.
- Multiple assignments are supported when the target column allows it.
- If no matching rule is found, no update will be applied.

How to set it up:

- Prepare a master source table with rules (e.g. client -> responsible person).
- Open your Monday.com board.
- Go to automations > Create automation.
- Choose a trigger.
- Select 'Auto Assign'.
- Define the mapping between the source value and the assignee.
- Save and test.

Use case:

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

Action

Then search in Column and update column
based on source board

Duplicates Management

Automatically detect duplicates in a selected column and mark them in a checkbox column.

➔ Supported columns (Source):

Item name, Text, Long text, Status, Number, Email, Phone, Dropdown, Date, Link

➔ Supported target columns: Checkbox

Please note that:

- **The app checks the selected column in the triggered item against all other items in the board to find matching values.**
- If matching values are found, the checkbox in the target column will be automatically ticked for all matching items, including the triggered item.
- If no matches are found, no updates will be applied.
- If the selected column is empty, no matches will be detected.
- Performance may vary depending on the number of items in the board; larger boards may result in longer execution times.

How to set it up:

- Open your Monday.com board.
- Go to automations > Create automation.
- Choose a trigger.
- Select 'Find Duplicates'.
- Define the Column and the Checkbox column.
- Create and test the automation.

Use case:

Detect items with the same email or phone number and mark them as duplicates for review.

Action

Then Find the duplicated items through this Column and mark this CheckBox

Count files

Counts the total number of files in a selected Files column and writes the result into a target column.

→ Supported columns (Source): File

→ Supported target columns: Text, Numbers, Status, Dropdown

Please note that:

- Only files attached to the item are counted
- If no files are attached, the result will be 0.
- For Status and Dropdown columns, if the label does not exist, it will be created automatically

How to set it up:

- Open your Monday.com board.
- Go to automations > Create automation.
- Choose a trigger.
- Select 'Count files'.
- Define the Files column and the Column.
- Create and test the automation.

Use case:

Automatically count the number of attached files in an item and use that value to drive workflows, such as updating a Status when files are added

Action

Then Count files in Column and save the total in Column

Type file

Extracts the file extensions from attachments in a selected Files column and writes them into a target column.

➔ Supported columns (Source): File

➔ Supported target columns: Text, Status, Dropdown

Please note that:

- Only files attached to the item are processed
- If no files are attached, no result will be returned
- Multiple file extensions will be separated by commas
- For Status and Dropdown columns, if the label does not exist, it will be created automatically

How to set it up:

- Open your Monday.com board.
- Go to automations > Create automation.
- Choose a trigger.
- Select "Extract File Types".
- Define the File Column and the Column.
- Create and test the automation

Use case:

Automatically extract and store file types (e.g. PDF, PNG, DOCX) to categorize or filter items based on their attachments.

Action

Then Extract the File Column extensions of attachments and recorde it in this Column

FAQs

1. Why is the automation not updating any value?

The automation will not run if the required conditions are not met. Make sure that:

- The source column value is not empty
- A matching rule exists (if applicable, e.g. Auto Assign or Find Duplicates)
- The selected columns are compatible with the action

2. Can I use any column type as source and destination?

No. Each action supports specific column types. If an unsupported column is selected, the automation may not run correctly or may return empty results. Always check the “Supported columns” section for each action.

3. What happens if the value does not exist in Status or Dropdown?

For automations that write into Status or Dropdown columns, if the value does not exist, GenieTools will automatically create it as a new label.

4. Why does the automation take longer in large boards?

Some actions (such as Find Duplicates or Auto Assign) scan multiple items in the board. In larger boards, this can increase execution time.

5. What happens if there are multiple matches?

It depends on the automation:

- **Find duplicates:** marks all matching items
- **Auto Assign:** supports multiple assignments if the column allows it
- Other actions may return multiple values separated by commas