

Instruction Manual

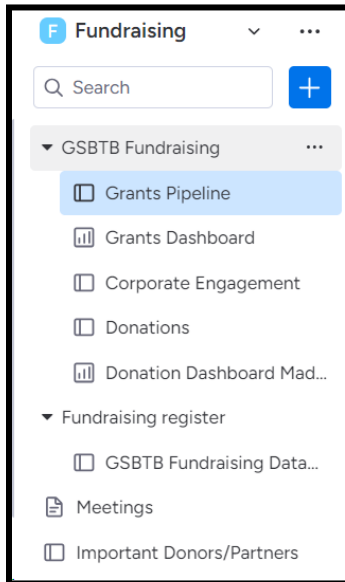


WPI

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Fundraising Archives



Step 1: Setting up Archive Boards

Under the “Fundraising” tab, new boards will need to be created and titled by year. An example of this would be “2023 Grants”.

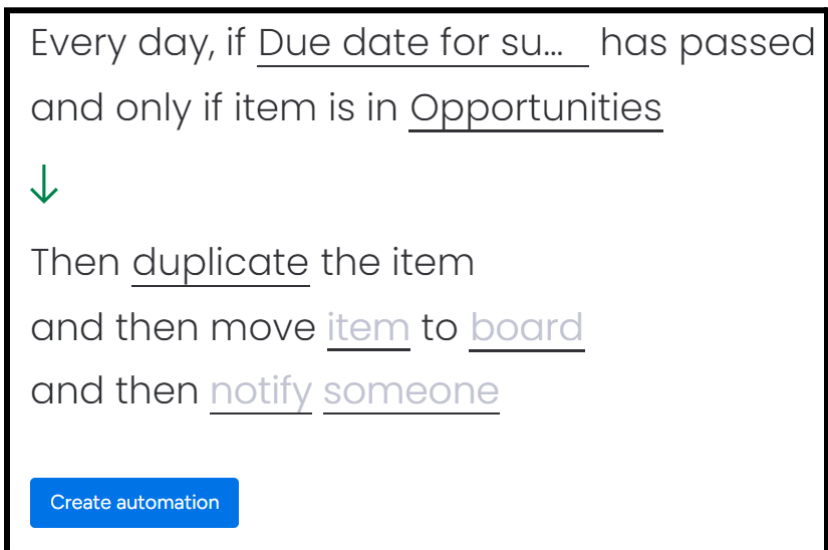
It would most likely be best to put the archives under their own folder so it stays organized.

Step 2: Automation

The first section recognizes that a due date passes on a grant in the opportunities group.

Next, Monday.com will duplicate the item so that no information is lost from the main board. It will then move the item into the archive board selected. Every year this

automation will have to be edited to switch the board to the new archive. Finally, it will notify someone that the grant due date passed and was archived. (A custom notification can be created if you click “notify”)



Step 3: Repeat

A new board will have to be created each year since Monday.com does not currently have automation for this. The folders can easily just be called every preceding year. Also need to remember to change the folder name in the automation too. When the automation is first created, 2023 and 2024 dates may have to be separated manually since both have dates that have passed, however after that everything should work automatically.

Information Importing

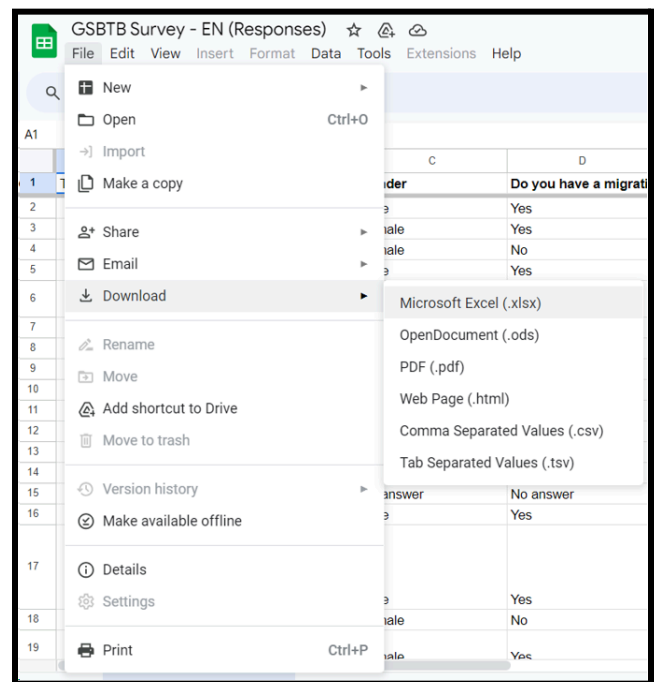
(For Google Sheets and Excel Files)

Step 1: Convert the Google Sheet to Excel

Monday.com only allows information to be imported from Excel spreadsheets.

To make this conversion:

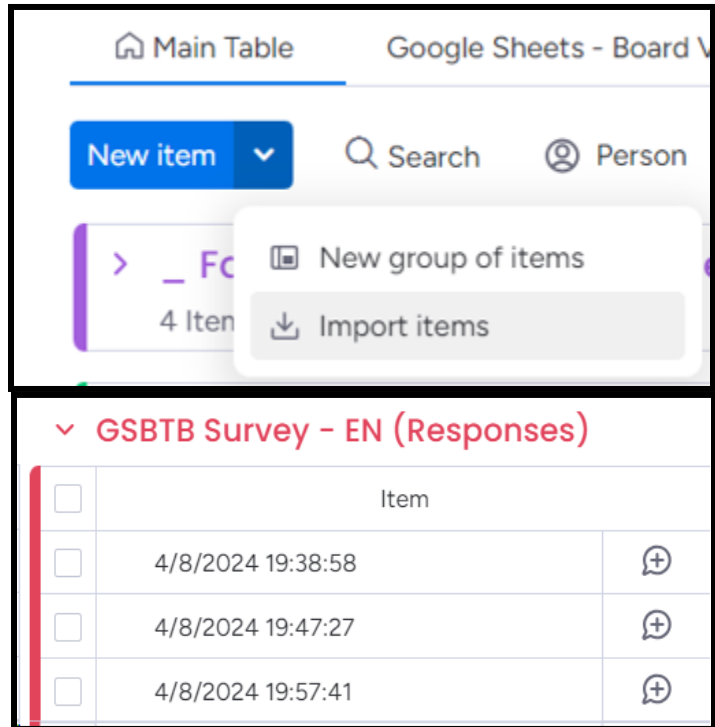
1. Open the google sheet
2. Go to “File”
3. “Download”
4. “Microsoft Excel (.xlsx)”



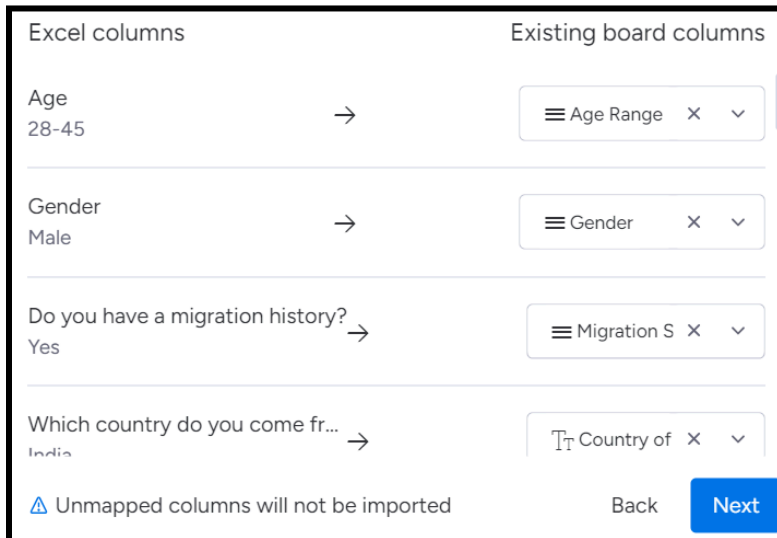
Step 2: Importing the Information Into Monday.com

In the Monday.com board, click the arrow next to “New Item” and then click import. From here, you can select the Excel file you want to import and click next. You can then select the head item, which will decide the item title (Right now it is the timestamp).

This is the head item →
It serves as a title for the information that follows. In this case, the timestamp indicates a different person.



Step 3: Selecting the information that you want



Now it will let you select which column goes with what information. Columns will have to be made beforehand so you can match the excel and existing columns. For example, “Age Range” was a column I made in the Monday.com table so I could match it with “Age”.

Click next and then start the import. Information will show up as a new group on the board.

Organizations Table

Category	Accounts/companies
Language	5
Government	18
Education	17
Social Organizations/Activities	88
Emergency Contact	4
Health	6
Shelter	

The organizations list has been organized by category to best fit the needs they address and how they help. Each group is sorted by the type organization, and when new ones are added just click sort at the top of the column and it will fill into the table. Unfortunately there is no auto-sort function at this moment.

Social Media

(Gathering data from follower usage)

Using a Google Sheets extension called “Coefficient”, you can import data from social media platforms such as the daily foot traffic (profile views) and post interaction (Likes, comments, shares, etc.).

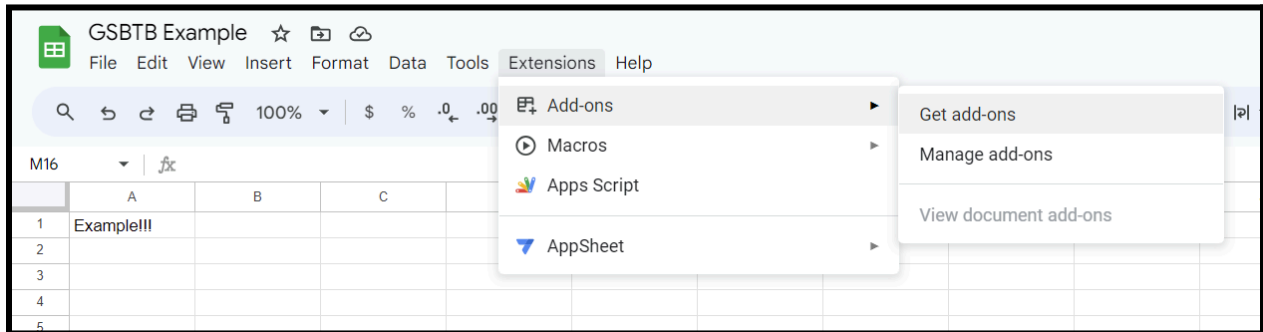
All you need to use it is the login for a supported social media platform (Username and Password).



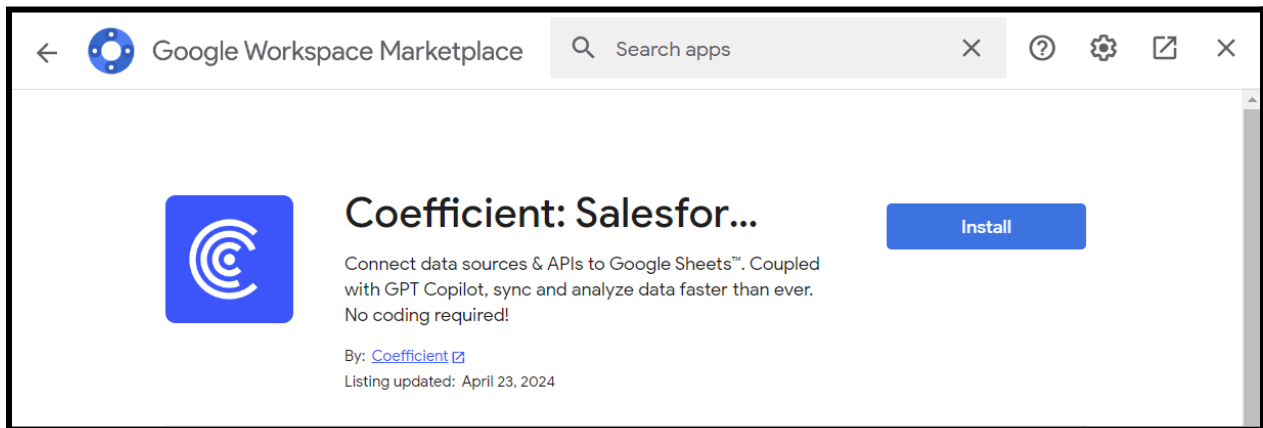
Step One: Make a Google Sheet and Download Coefficient

To download Coefficient:

1. Open the Google Sheet
2. Go to the “Extensions” tab
3. Under “Add-ons” click “Get add-ons”



4. In the “Search apps” bar, type “Coefficient”
5. Click on the extension that says “Coefficient: Salesforce, HubSpot Data Connector” (it's the first one)
6. Click Install

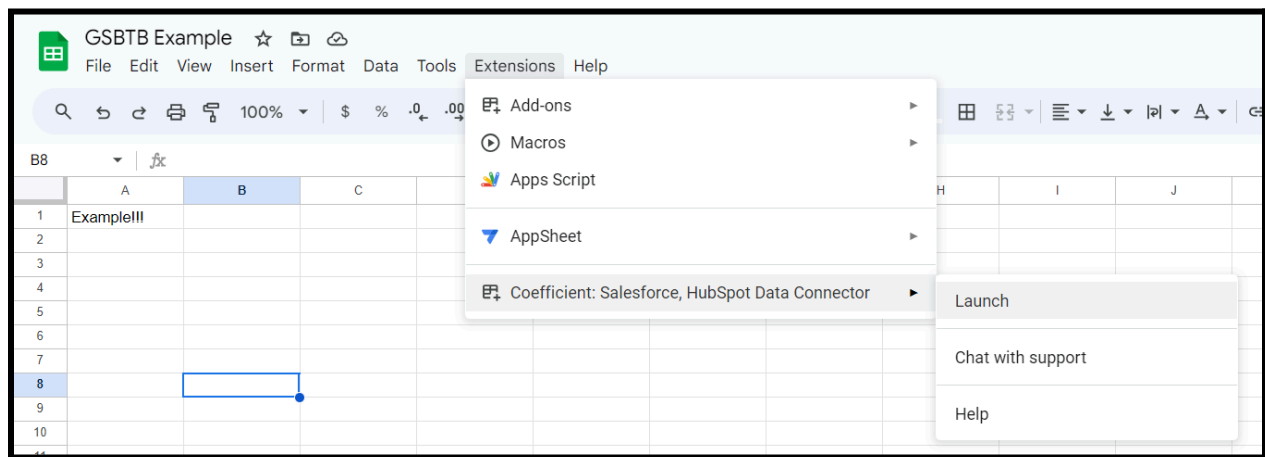


Step 2: Find the Account you want to take data from

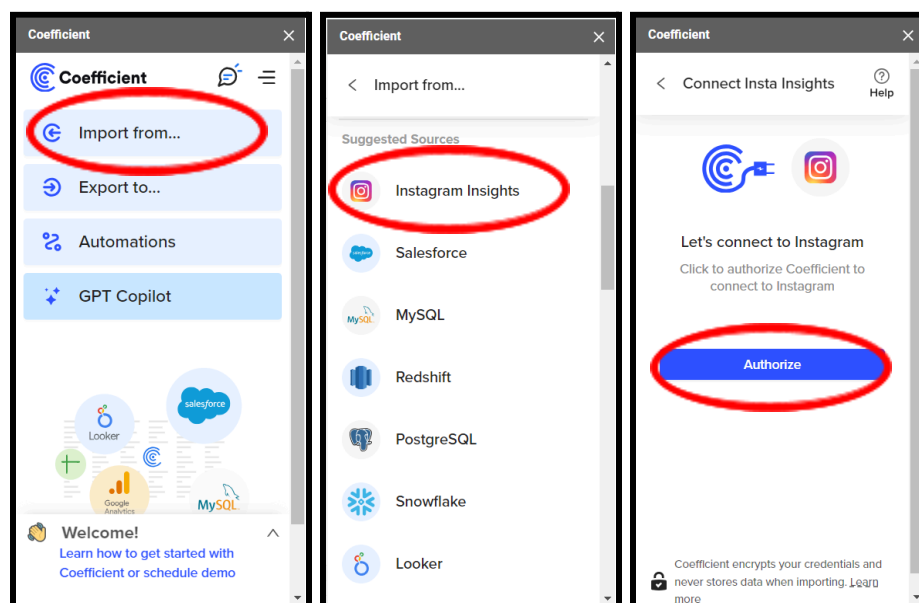
(We will use Instagram as an example, but there are plenty of options)

Now we connect the Instagram account to Coefficient so we can pull data from it. To do this:

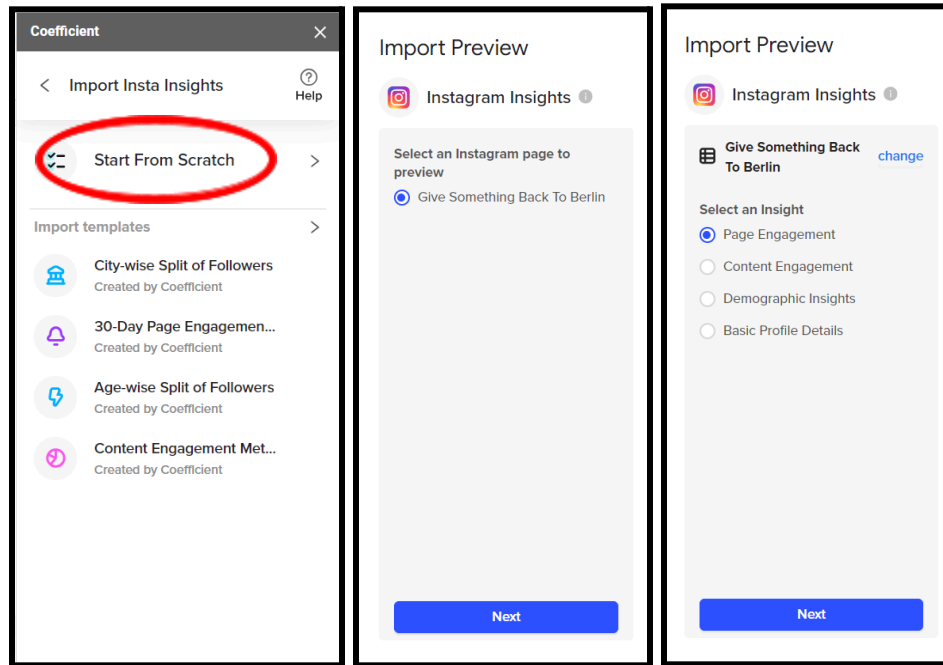
1. Go back into the “Extensions” tab in the Google Sheet
 - a. There will be another section where you can select “Coefficient”
2. Under “Coefficient”, select “Launch”



3. Select “Import from...”
4. Select “Instagram Insights” under “Suggested Sources”
5. Select “Authorize” and use your Instagram login details to authorize Coefficient’s connection to the account of choice



6. After successful connection, select “Start From Scratch”
 - a. An “Import Preview” window should pop up
7. Under the “Import Preview” window, you can select “Give Something Back to Berlin” and click “Next”
8. Now you can select on of the Insights you would like
 - a. For this example, we will look at “Page Engagement”

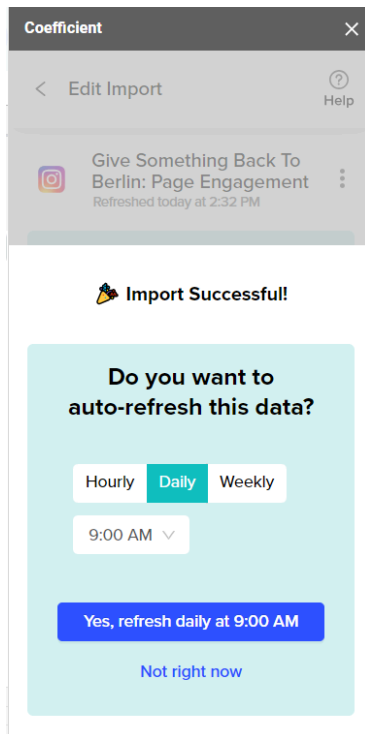


9. Select the data points you would like to see
 - a. Selected here is “Date”, “Impressions”, “Profile Views”, and “Reach”

Date	Impressions	Profile Views	Reach
2024-04-01	114	12	74
2024-04-02	1295	30	592
2024-04-03	1598	59	876
2024-04-04	443	39	189
2024-04-05	210	29	112
2024-04-06	171	15	66
2024-04-07	66	7	43
2024-04-08	700	27	244
2024-04-09	876	37	533
2024-04-10	966	52	595
2024-04-11	1559	54	807
2024-04-12	369	20	301
2024-04-13	158	12	125
2024-04-14	825	18	750
2024-04-15	1236	34	627
2024-04-16	862	40	563

10. Click import and the information will show up in the Google Sheet

Step 3: Automation



Automation is made very simple by Coefficient.

First, you can select whether you want information to update hourly, daily, or weekly.

For hourly:

Select how often you want to refresh (i.e. Every 2 Hours, Every 4 Hours)

For Daily:

Select what time of day you'd like the refresh to occur (i.e. 9:00 AM, 10:00 AM, etc.)

For Weekly:

Select the day and time you'd like the refresh to occur (i.e. Monday at 9:00 AM)

Next you click “yes” and the information will update and show up on the Google Sheet as often as you just selected.

Congrats, you have constantly updating social media data!

In the case of the Google Sheet that we already created for you and is inserted into the “Communications” workspace of Monday.com titled “Instagram Analytics”, we have inserted page engagement and content engagement for both the Facebook and Instagram accounts. Every month a new table will be added to the sheet that details the activity from the past month

If you want other data such as the demographics, you can simply follow the steps above and add a demographics table to the Google Sheet! Nothing will be deleted from the old tables when this happens.