Complete Client Manual – Trend Tracker Tool

Google Alerts Automation, Report Generation, and Query Management in NotebookLM

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Client Documentation: How to Manage Google Alerts and Generate Reports

Overview of the Process

We have set up a system where **Google Alerts** emails are automatically processed and a daily report is generated from them. The process is mostly automated, but there are manual options available when needed. Here's how the system works:

1. **Google Alerts Emails**: Each day, you receive Google Alerts emails in your Gmail inbox. These emails are automatically moved to a folder called **"processLinks"** by a Gmail filter.
2. **Automated Report Generation**: Every morning between 8-9 AM, a program runs in the background (using Google Apps Script) that reads all the emails in the **processLinks** folder. It creates a report based on the sources in those emails and then clears the folder.
3. **Manual Trigger**: If there's ever an issue, or if you want to generate the report yourself, you can do so by opening a **Google Sheets document** called **"GenerateReport"**. Inside this document, there's a button labeled **"Update Records"** that you can click to manually run the program.
4. **What Happens If There's an Error**: If something goes wrong while the program is running (like a temporary error), the emails in the **processLinks** folder will remain there, and you'll need to move them back to the folder before running the script again.

What to Do if You See an Authorization Request

Sometimes, when you try to manually run the program using the **"Update Records"** button in **Google Sheets**, you might see a pop-up asking you to **authorize the script**. This happens because Google needs your permission to allow the script to access your Gmail account and generate reports on your behalf.

Here's how to handle it:

Step-by-Step Troubleshooting

Step 1: What is an Authorization Request?

- When you run the script manually, it needs access to your Gmail inbox to process the emails. Google will ask you to give the script permission to do this.
    - **Why it happens**: It's a security measure to make sure that only trusted apps can access your information. When you run the script manually for the first time, or after certain changes, Google will ask for this permission.

Step 2: What to Do When You See the Authorization Prompt

- When you click the **"Update Records"** button in **Google Sheets**, you might see a pop-up asking you to **"Review Permissions"**. This means the script needs your approval to continue.
    - **Here's what you'll do:**
        1. Click on the **"Review Permissions"** button.
        2. A new window will appear asking you to log into your Google account. **Choose the Google account** that's linked to your Gmail where the Google Alerts are sent.
        3. You'll then see a list of permissions that the script needs (like accessing your Gmail account, Google Sheets, etc.). Click on **"Allow"** to give the script access.

What happens next: Once you click **Allow**, Google will confirm that the script now has access to your Gmail account and can run as intended.

Step 3: Handling a Warning About Unverified Apps

- Sometimes, Google will display a warning that says **"This app is not verified"**. This is a standard message that Google shows when you're running a custom script or app that isn't listed in their official marketplace.
    - **What to do**:
        1. Click **Advanced** (this option is usually at the bottom of the warning message).
        2. Then click on **Go to (unsafe)**. Don't worry — this is normal since the script is built specifically for your own use.

3. Finally, click **Allow**.

This will give the script permission to run without any further prompts.

Step 4: Manually Running the Script

- After authorizing the script, you should be able to run it successfully. Go back to your **Google Sheets document**.
  - **Click the "Update Records" button**. The script will run, and it will generate the report from the emails in your Gmail account.
  - **If it runs successfully**, you should see the report generated in the desired format, and the emails will be moved back to the inbox from the **processLinks** folder.

What to Do If Something Goes Wrong

If you follow the steps above and still have issues, here's what you can try:

Issue 1: You Don't See the Authorization Prompt

- **Solution**: Sometimes the authorization prompt doesn't appear right away, especially if you've already authorized the script before.
  - Refresh your **Google Sheets** page and try clicking the **"Update Records"** button again.
  - If the problem persists, try logging out of your Google account and logging back in, then try again.

Issue 2: The Script Runs, But Doesn't Process Emails

- **Solution**: The emails might not be in the **processLinks** folder when the script runs, or they might have been moved elsewhere.
  - **Check the processLinks folder** in Gmail. If the emails aren't there, move them back into the folder before running the script again.
  - If you're unsure where the emails are, search for them in your Gmail inbox and make sure they're correctly labeled.

Issue 3: You Get an Error in the Script

- **Solution**: If the script runs but you see an error, you can check the error logs to see what went wrong.
  - Go to **Extensions** → **Apps Script** in your Google Sheets document.
  - In the Apps Script editor, click on **View** → **Logs**. This will show you any errors that happened when the script ran.

Issue 4: The Emails Are Not Moved Back to the Inbox

- **Solution**: If the script encounters an error, it might not process the emails properly.
  - You can manually move the emails back to the **processLinks** folder in Gmail.
  - Once you've done that, try running the script again by clicking **"Update Records"** in Google Sheets.

Video Tutorial for Troubleshooting

For a more detailed walkthrough of troubleshooting any issues, including Gmail authorization requests, we've created a video tutorial. The tutorial covers the steps in visual form and can be found in the **Troubleshooting** folder on **Google Drive**.

Summary of Key Steps

1. **Authorization Request**: When you manually run the script, Google may ask for permission to access your Gmail account. Follow the prompts and click **Allow**.
2. **Unverified App Warning**: If you see a warning, click **Advanced** → **Go to (unsafe)** → **Allow**.
3. **Running the Script**: After authorizing, click the **"Update Records"** button in **Google Sheets** to generate the report.
4. **Troubleshooting**: If things don't work, check the processLinks folder, view the error logs, and ensure emails are correctly processed.

By following these simple steps, you should be able to manage the Google Alerts processing system smoothly. If you encounter any issues, refer to the video tutorial or reach out for support.

Google Alerts: -

How to Create an alert?

Here's a step-by-step guide on how to set up a Google Alert:

1. **Go to Google Alerts:**
    - Open your preferred web browser and search for "Google Alerts" or directly go to https://www.google.com/alerts.
2. **Enter Your Search Term:**
    - In the search box, type the topic or keyword you want to track. Be as specific as possible to get the most relevant results.
3. **Refine Your Search (Optional):**
    - **Use quotation marks (" ")** to search for an exact phrase.
    - **Use a plus sign (+)** to include a specific word or phrase.
    - **Use a minus sign (-)** to exclude a specific word or phrase.
    - **Use a tilde (~)** to include synonyms of a word.

    More about this in the next section
4. **Customize Your Alert:**
    - **Delivery Frequency:** Choose how often you want to receive alerts (as it happens, daily, weekly) – We *choose daily for our reporting*.
    - **Source Type:** Specify the type of sources (news, blogs, web, etc.) – *We choose all sources*.
    - **Language:** Select the language of the results – *Select English*.
    - **Region:** Choose the region where the content originates – *Select worldwide*.
    - **Deliver to:** Select our email address *[make sure you are logged-in with your sdi.engineering.alerts@gmail.com email address]*
5. **Create Alert:**
    - Click the "Create Alert" button.

How to effectively create an alert?

To get the most precise search results, consider these advanced search techniques:

Boolean Operators:

- AND: Combines two or more terms, narrowing results to those containing all terms.
  - Example: "climate change" AND "renewable energy"
- OR: Expands results to include pages containing either term.
  - Example: "solar power" OR "wind energy"
- NOT: Excludes a specific term from results.
  - Example: "electric cars" NOT "Tesla"

Phrase Searching:

- Quotation Marks (""): Enclose exact phrases to find results with those specific words in that order.
  - Example: "global warming effects"

Site-Specific Search:

- Site: Limits search to a specific website or domain.
  - Example: site:nasa.gov climate change

Other Tips:

- Use Synonyms: Try different words with similar meanings to broaden or narrow your search.
- Be Specific: The more specific your search terms, the more relevant your results will be.
- Check Spelling and Grammar: Typos can lead to unexpected results.
- Use Google's Search Tools: Explore options like "Tools" to filter by date, language, region, and more.

By mastering these techniques, you can significantly improve the accuracy and relevance of your Google searches.

Client Documentation: Accessing Reports and Running Queries in NotebookLM

Overview

You have an automated system that generates daily reports from the **Google Alerts** emails. These reports are saved in **Google Drive** with a unique **date_time** name each day. These reports are then used in **NotebookLM**, where you can run queries to extract valuable insights.

Additionally, you have a set of **sample queries** that we've pre-developed to help you get started with using the reports. You can also customize these queries and improve them as needed.

This guide will walk you through how to access the reports, set up and work with **NotebookLM**, and update important documents like the **base files** and **product brochures** in **Google Drive**.

Step 1: Setting Up and Using NotebookLM

The reports you've saved in Google Drive are now ready to be accessed in **NotebookLM**, where you can run queries to gain insights.

1. **Access NotebookLM**:
    - Open the **NotebookLM** application or platform (this could be a specific software or web interface that you're using).
    - If you don't have the NotebookLM app open already, ensure you're logged in with the correct account.
2. **Connect to Google Drive**:
    - In NotebookLM, go to the **data source connection settings,** the plus icon on the left-hand side of the screen.
    - Select **Google Drive** as your source and authenticate using the Google account that has access to your reports.

- Once connected, **navigate to the folder** where the daily reports are stored.

3. **Load the Report**:
    - After connecting Google Drive, **select the report** (the one you saved earlier with the **date_time** name).
    - The report will load into **NotebookLM** for querying.
4. **Run Queries**:
    - Use the **sample queries** provided (or create new ones) to extract meaningful insights from the data.
    - You can run these queries directly in NotebookLM's query interface.
5. **Modify Queries**:
    - Feel free to modify the sample queries to better suit your needs. For example, you could change the parameters, filter data by different dates, or add more complex conditions.

Step 2: Using Sample Queries for Better Insights

We've developed a set of **sample queries** to help you get started and ensure you get the most useful insights from the reports.

1. **Access Sample Queries**:
    - The sample queries document is available in **Google Drive** under the **Sample Documents** folder.
    - Open the document and review the list of sample queries we've developed through **prompt engineering**.
    - These are optimized queries to help you filter and analyze your data quickly.
2. **How to Use Sample Queries**:
    - Copy the query you want to use from the document.
    - Paste it into the **NotebookLM query interface** and modify it if needed.
    - Run the query to view results and further refine your insights.

Step 2: Updating and Maintaining Key Documents in Google Drive

To keep your data and reports relevant, you can update important documents in **Google Drive**, including your **base files** and **product brochures**.

1. **Access the Base Files Document**:
   - The **base files** document, which includes key company information, is stored in **Google Drive** under the **Base Files** folder.
   - This document includes general company details, product information, and any other foundational content that could be referenced during queries.
   - Open the **Base Files** document to review and edit.
2. **How to Update the Base Files Document**:
   - **Add New Information**: If there's new product information, company updates, or anything else to add, just click on the document and start typing.
   - **Modify Existing Information**: You can modify sections as needed to ensure the base files remain current and accurate.
   - **Add More Content**: Feel free to add more sections, such as additional product brochures, marketing collateral, or key performance data.
3. **Access and Update Product Brochures**:
   - In addition to the **base files**, you may have product brochures or additional marketing documents stored in **Google Drive**.
   - Create a **product brochures folder** (or any other relevant folder) and place the brochures you'd like in that folder for each access.
   - **Modify the documents** by adding new product information, updating images, or correcting any outdated content.
4. **How to Make the Documents More Insightful**:
   - Consider adding **customer feedback**, **case studies**, or **recent achievements** to make the documents richer in context.
   - This will ensure that any queries or reports run using these documents reflect the most up-to-date and insightful data.

Summary of Key Steps

1. **Access Daily Reports**: Go to **Google Drive**, find the daily report (named with **date_time**), and open it in **Google Sheets**.
2. **Set Up NotebookLM**: Connect **NotebookLM** to your Google Drive, load the report, and run queries to extract insights.
3. **Use Sample Queries**: Review the **Sample Queries** document in **Google Drive** and run those queries in **NotebookLM** for quick results.
4. **Update Key Documents**: Regularly update the **base files** and **product brochures** in **Google Drive** to keep your data accurate and insightful.
5. **Enhance Your Querying**: Modify sample queries and add more context to your reports as needed for deeper insights.

By following these steps, you'll be able to easily access and work with the reports, run meaningful queries, and keep your documents updated for better insights and more informed decision-making.

Tutorial: Saving and Pinning Notes in NotebookLM

Overview

NotebookLM allows you to run queries, generate reports, and add notes to your sessions for easy reference. However, it's important to note that **results are not automatically saved**—you will need to save your work manually. This tutorial will guide you through the process of **saving your notes** and **pinning them** for future reference, as well as provide a **disclaimer** to remind you about saving your results properly.

Step 1: Saving Your Notes in NotebookLM

While running queries or working with data in NotebookLM, you may want to save key insights or notes for future reference. Here's how to do it:

1. **Open the NotebookLM Session**:
    - Make sure you're logged into **NotebookLM** and have loaded your dataset or report.
2. **Add Notes to Your Session**:
    - In the **NotebookLM interface**, look for the **notes section** (this could be a text box or panel where you can add annotations).
    - **Write your notes** or insights in this section. You can document anything you find useful, such as:
        - Key observations from the query results.
        - Interpretations of the data.
        - Ideas for follow-up queries or next steps.
3. **Save Your Notes**:
    - **Click the "Save" button** in the notes section to save your work. If you're adding detailed insights, it's important to save them regularly to avoid losing any information.

    - In some NotebookLM setups, there may be a **"Save Notes"** or **"Save Session"** option that you need to click after entering your notes.

4. **Check the Notes**:
    - Once saved, your notes will be available within the NotebookLM interface, typically in a section dedicated to saved data or notes.
    - You can come back to these saved notes at any time by opening your NotebookLM session and accessing the **"Notes"** panel.

Step 2: Pinning Notes for Easy Access

Pinning notes ensures that they stay visible or easily accessible while you're working in **NotebookLM**. This is especially helpful when you're working with multiple queries or running complex analyses.

1. **Locate the Notes**:
    - Go to the **Notes section** where you saved your insights or results.
2. **Pin the Notes**:
    - Look for a **pin icon** next to the note or note panel. This icon is often located near the title or the upper-right corner of the note.
    - **Click the pin icon** to "pin" the note. Once pinned, the note will remain at the top of your session or workspace for easy reference.
3. **Unpinning Notes**:
    - If you no longer need to keep a note pinned, simply click the **unpin icon** (often located near the same area as the pin icon) to remove it from the pinned section.
4. **Organizing Pinned Notes**:
    - In some versions of **NotebookLM**, you may also be able to organize pinned notes in a **sidebar** or a **floating panel** that stays visible while you work on other tasks.
    - Use this feature to keep the most important notes always within reach.

Step 3: Disclaimer—Results Are Not Automatically Saved

It's very important to understand that while you can add, save, and pin notes in **NotebookLM**, **results and notes are not automatically saved** unless you explicitly do so. This is a key reminder:

Disclaimer:
*Results, queries, and notes within NotebookLM are **not automatically saved**. You must manually click the **"Save"** button to ensure that any insights or data you have generated remain accessible in the future. If you exit your session without saving, any unsaved notes will be lost.*

How to Save Your Results Manually

1. **After Running Queries**:
    - Once you've run a query and are satisfied with the results, you will need to **save the results** manually.
    - Look for a **"Save Results"** button in the NotebookLM interface. It may be in the query results panel or the export section.
    - **Click on "Save Results"** to store the output in a preferred location (e.g., your **Google Drive** or in the **NotebookLM storage**).
2. **Exporting Data**:
    - If you want to keep the data in an external file format (like **CSV** or **Excel**), use the **Export** feature in NotebookLM:
        - Click on the **"Export"** button after running the query.
        - Choose your preferred file format (CSV, Excel, etc.).
        - Save it to your desired location (like **Google Drive** or **local storage**).
3. **Setting Reminders to Save**:
    - It's a good practice to set **reminders** to save your work every time you reach a significant milestone (e.g., after completing a query, generating insights, or adding notes).

- You can use reminders within **NotebookLM** or external tools (like Google Calendar or task management apps) to remind yourself to save your work regularly.

Step 4: Accessing Saved and Pinned Notes

Once you've saved your notes and pinned them for easy access, you can always revisit them later:

1. **Reopen the Notes Panel**:
   - When you open your **NotebookLM session** again, the **saved and pinned notes** will be available in the notes section.
   - **Pinned notes** will remain visible at the top or in the pinned section for easy access.
2. **Use Saved Notes for Further Analysis**:
   - If your notes contain important insights or ideas for follow-up queries, simply click on the saved note to review it.
   - You can update, expand, or run new queries based on the insights saved in these notes.

Step 5: Additional Tips for Effective Note-Taking and Saving

- **Keep Notes Organized**: If you're working on multiple analyses, it's useful to create separate notes for each task. This way, you can keep related insights together and avoid confusion.
- **Tagging Notes**: If available in your NotebookLM setup, consider using **tags** or **labels** to categorize your notes. For example, you can tag notes by query type, data insights, or action items.
- **Regular Backups**: In addition to saving within **NotebookLM**, consider making periodic backups of important results by **exporting** them to a separate folder in **Google Drive** or another cloud service.

Summary of Key Steps

1. **Add Notes**: Write and save notes to document key insights, observations, and ideas.
2. **Pin Notes**: Pin important notes to keep them visible for quick reference.
3. **Manual Saving**: Remember to manually save your results, notes, and queries—**they are not saved automatically**.
4. **Access and Revisit Saved Notes**: Open pinned and saved notes later to continue your analysis or review insights.
5. **Organize Your Work**: Use tags, labels, and separate notes for better organization.

By following these steps, you'll be able to effectively save, pin, and manage your notes in **NotebookLM** while ensuring your results are properly stored and accessible for future use.
