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**Monday.com Data Collection Process**

**Overview:**

We will be using Monday.com to track our SiteLink data to track leads placed, move ins, marketing inquiry types, and more. To do this, we will need to take data from SiteLink, format, then upload to Monday.com. Below is what a dashboard may look like.

Graphical user interface, application

Description automatically generated

To accomplish this easily, we have created a Python script that will format the file accordingly.

**Requirements:**

* Access to the script
  + The script can be found here: **ADD PATH TO THE PYTHON SCRIPT.**
  + To run this, you will need to have python and PyCharm installed on your computer.
* Access to SiteLink

**Step 1: Download File from SiteLink**

* To do this, download all leads report as well as all move in report from sitelink.
* Make sure to download as xlsx.

**Step 2: Re-Save and Rename File for python script to have access**

* To successful run the script (and to save ourselves a lot of time) we need to resave the xlsx file into a **specific location**, **specific name**, and **specific file type**.
  + With the file you just downloaded from SiteLink, open it and press save as.
  + This file must be saved in the same folder as the python script (**CAN BE FOUND HERE).**
  + Additionally, the file must be saved with the file type of ‘.xls’, or in excel ’97 – ’04.
  + The File name must match the line in the code with the ‘read\_excel’
    - Text

      Description automatically generated
  + For simplicity sake, keep the name file-to-format.xls. Or you can change the name of this line of code (the text between the single quotations.

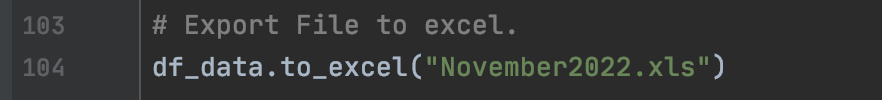
By the end of this step, the folder you will be working in should look like this:

Graphical user interface, application, Word

Description automatically generated

You will need to do 2 files, leads and move ins. Do them 1 at a time.

**Step 3: Run Python Script to format File**

* After having the same setup as above, you can move on to running the script.
* At the bottom of the script, there is a line *df\_data.to\_excel(),* here is where the program saves the file to the folder. You can easily change the name of the file you are uploading here. (Make sure you put the new name inside of the green quotations and with no spaces)
* ****
* Hit the play button on the top.
* After running this, the File shop pop up in the folder with the script. This can be used to upload to Monday.com and deleted after upload is completed.

**Troubleshooting**

There are 3 possible errors.

1. You haven’t saved the files properly. Make sure step 2 was properly done.
2. You are not using the right file. Be sure step 1 was properly done
3. You do not have Pandas installed.
   1. Scroll to the top, you will see ‘import pandas as pd’
   2. If there is a red line under pandas, youll need to install it.
      1. Do this by hovering you mouse over the word pandas, There will be an option for installing pandas, do that and wait for the progress bar on the bottom of the window to be done. Restart PyCharm and try again.
4. You do not have a ‘configuration’ created. (or a proper one)
   1. To do this, click edit configurations as shown below:  
      Graphical user interface, text, chat or text message

      Description automatically generated
   2. Click the Plus button on top left of the pop up window
   3. Click Python
   4. On Script Path, make sure it is navigating to the Monday-conversion script.
   5. Click Okay.

**Step 4: Upload to Monday.com**

1. Now that a file is ready for upload, we want to navigate to Monday.com and the lead funnel sheet, called lead funnel.
2. Click the blue arrow next to New Item
3. Click Import Items
4. Select your file to upload
5. For the Map your Data Page, we want to map via TenantID
6. Next is column mapping, the script should have taken care of most of the issues, but be sure every column in excel has a match in Exisiting Board Columns
   1. Do not worry about the first ‘0’ column, that column is not needed.
7. Hit Next
8. Select Create New Items
9. Start Import
10. Data should be importing now.
11. Be sure to rename group to ‘MonthYYYY’

**Step 5: Manage Duplicates**

1. To do this, hit : 3 dots in the top right -> more actions -> manage duplicates
2. Search Duplicates on Name column. This will show all duplicates on the TenantID column.
3. This process is a bit subjective. **The goal is to catch every lead that has changed to a move in in a subsequent month.**
4. Often, you will run into other situations where users created 2 leads under one Tenant. These should not be touched.
5. More rules to be added below: