



LEADS



USER GUIDE eCRM Dashboard Widget

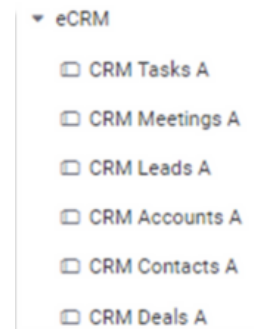
Eligeo Business Solutions

Helping our clients grow by providing technology consulting and custom software solutions

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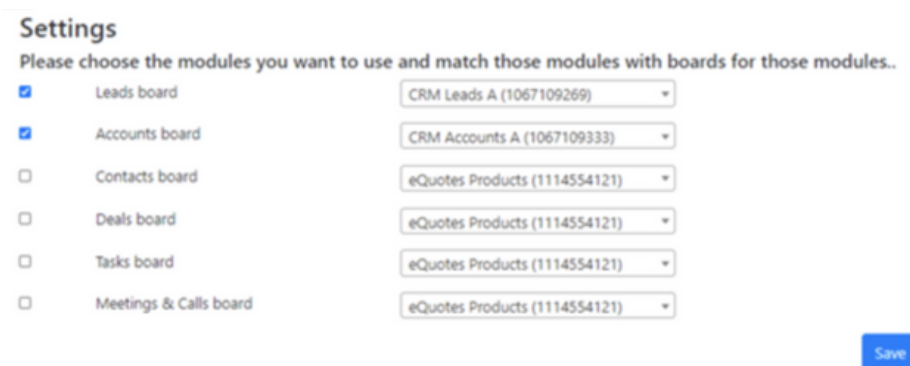
INSTALLATION

Eligeo Business Solutions created a “workspace template” to use with their eCRM app. It is a folder of boards that have the outline and structure needed to get started with eCRM. It is suggested that you use this template, especially if you are a new user.



eCRM can be added to your monday.com account from the marketplace by an admin. Once installed, you can add eCRM as a widget to any dashboard. You will be directed to use the eCRM template if it's not added already.

Once the widget is added you need to select which modules you would like and pair them to the matching boards.

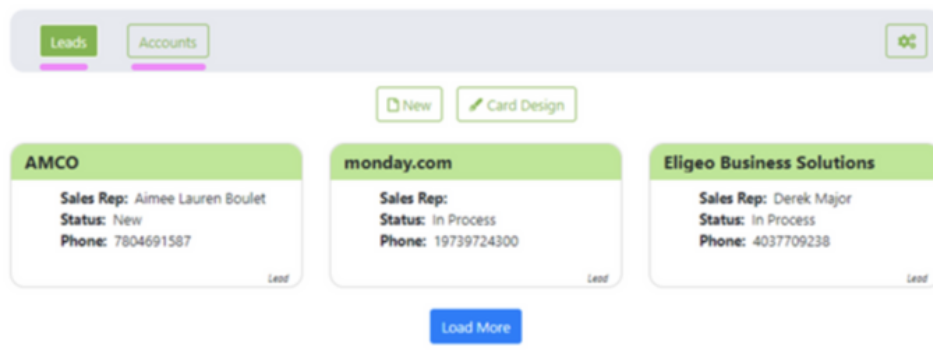


If you need to change the board selections, you can do so by clicking on the gear icon.



USING eCRM

Selected modules/boards will be at the top of the widget as tabs to toggle between.

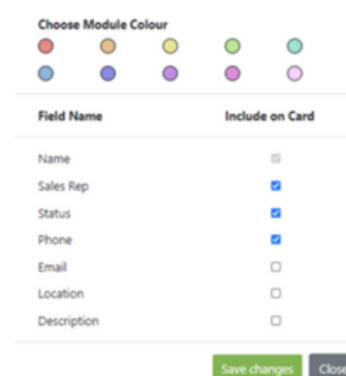


You can add new records directly from the widget.

The 'Add New' form is a modal window with a close button (X) in the top right corner. It contains the following fields: 'Name' (text input), 'Sales Rep' (dropdown menu with 'Nothing selected'), 'Status' (dropdown menu with 'Nothing selected'), 'Country' (dropdown menu with 'Canada'), and 'Phone' (text input). At the bottom right, there are 'Save' and 'Cancel' buttons.

There are certain column types that do not allow for additions to records. They are Location, Progress Bar, Auto Number, Item ID, Last Updated, Creation Log, Formula, and Files.

Each module has a design card setting tab that lets you filter columns and change colors.



USING eCRM (cont.)

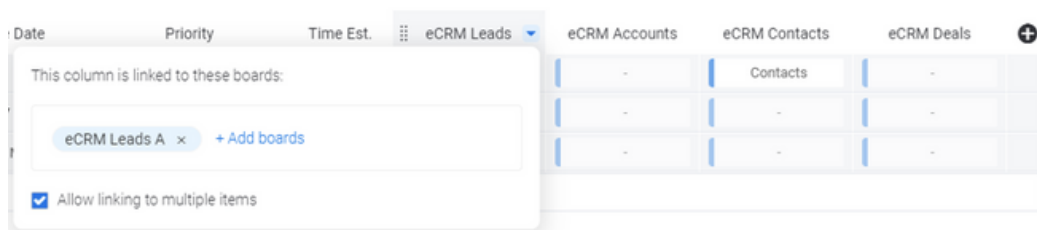
Each record has a main card view where you can see details, add and review tasks and meetings, and include comments.

The screenshot shows a record card for 'AMCO'. At the top, there are four tabs: 'Detail' (active), 'Tasks', 'Meetings & Calls', and 'Comment'. Below the tabs, the record details are displayed in a grid format:

Sales Rep Aimee Lauren Boulet	Status New	Country Canada	Phone 7804691587
Email amco@shaw.ca	Location Edmonton, AB	Description <input type="text"/>	

Note: If tasks and meetings boards were not selected on the initial setup these tabs will not work.

If using the eCRM template, these boards will be selected automatically on the initial setup. To confirm they are connected, you can check the tasks and meetings boards. There are 4 connect board columns that accommodate the creation of events. Check in the “column settings” and ensure the right boards are connected.

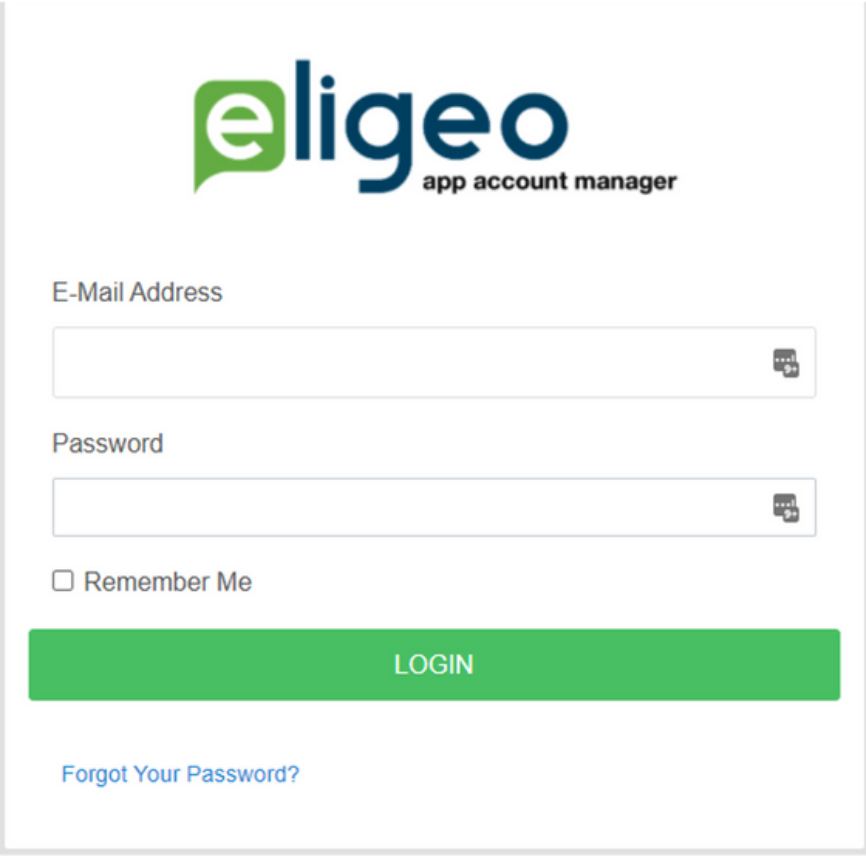


Note: A plan for future release is to have full capabilities of the item view in the comment area. For right now it is just a description box.

ADMIN

Note: Only one user from each account can be on the Eligeo app portal.

If an error message is received it is most likely because an alternate user is attempting to add and connect an app to the account. *We are currently reworking the workflow for this process but if error requests are received the account associated with the app portal will need to be reset so another user can access it.*



The image shows a login form for the Eligeo app account manager. At the top is the Eligeo logo, which consists of a green speech bubble containing a white 'e' followed by the word 'ligeo' in blue, and 'app account manager' in a smaller blue font below it. Below the logo are two input fields: 'E-Mail Address' and 'Password'. Each field has a small icon on the right side that looks like a speech bubble with a plus sign. Below the password field is a checkbox labeled 'Remember Me'. At the bottom of the form is a large green button with the word 'LOGIN' in white capital letters. Below the button is a link that says 'Forgot Your Password?' in blue text.