



# LEADS



## USER GUIDE eCRM Dashboard Widget

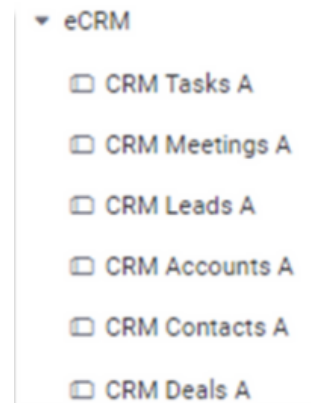
Eligeo Business Solutions

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

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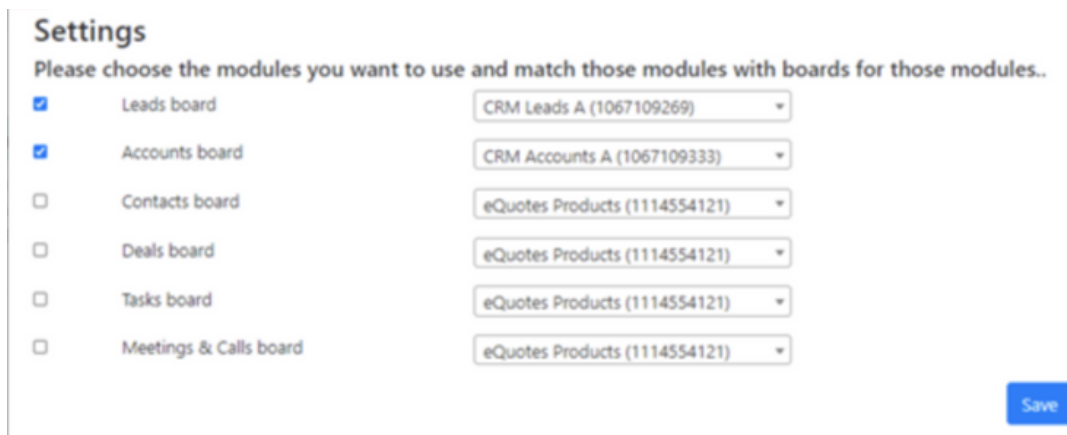
# INSTALLATION

Eligeo Business Solutions created a “workspace template”. It is essentially a folder of boards that have the outline and structure needed to get started with eCRM. It is suggested that new users use this template.



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

Once the widget is added, you will need to select which modules you want to pair to the matching boards.

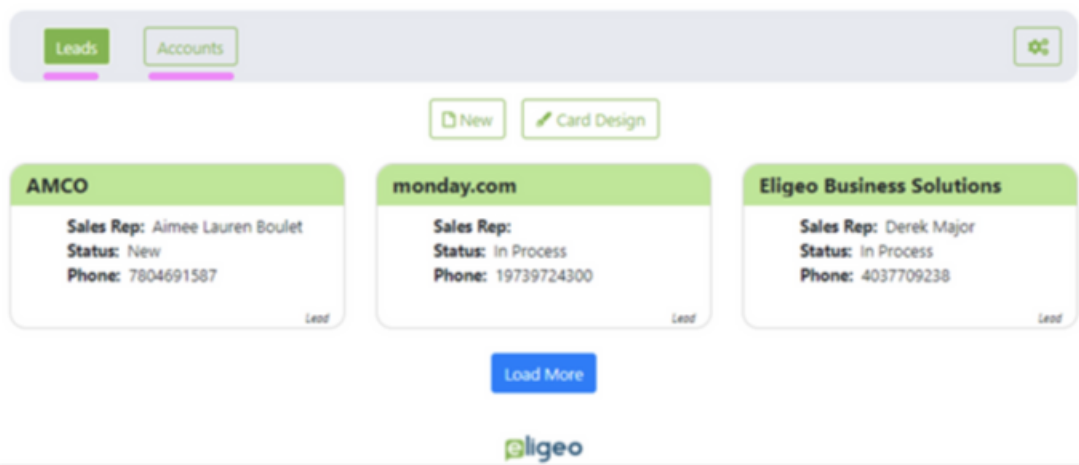


If you need to change the board selections, you can do so by clicking on the gear icon.



# 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:** A text input field.
- Sales Rep:** A dropdown menu currently showing 'Nothing selected'.
- Status:** A dropdown menu currently showing 'Nothing selected'.
- Country:** A dropdown menu currently showing 'Canada'.
- Phone:** A text input field.

At the bottom right of the form are two buttons: 'Save' (green) and 'Cancel' (grey).

# USING ECRM (CONT.)

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

Field Name	Include on Card
Name	<input type="checkbox"/>
Sales Rep	<input checked="" type="checkbox"/>
Status	<input checked="" type="checkbox"/>
Phone	<input checked="" type="checkbox"/>
Email	<input type="checkbox"/>
Location	<input type="checkbox"/>
Description	<input type="checkbox"/>

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

**AMCO**

Detail Tasks Meetings & Calls Comment

Sales Rep: Aimee Lauren Boulet  
Status: New  
Country: Canada  
Phone: 7804691587  
Email: amco@shaw.ca  
Location: Edmonton, AB  
Description:

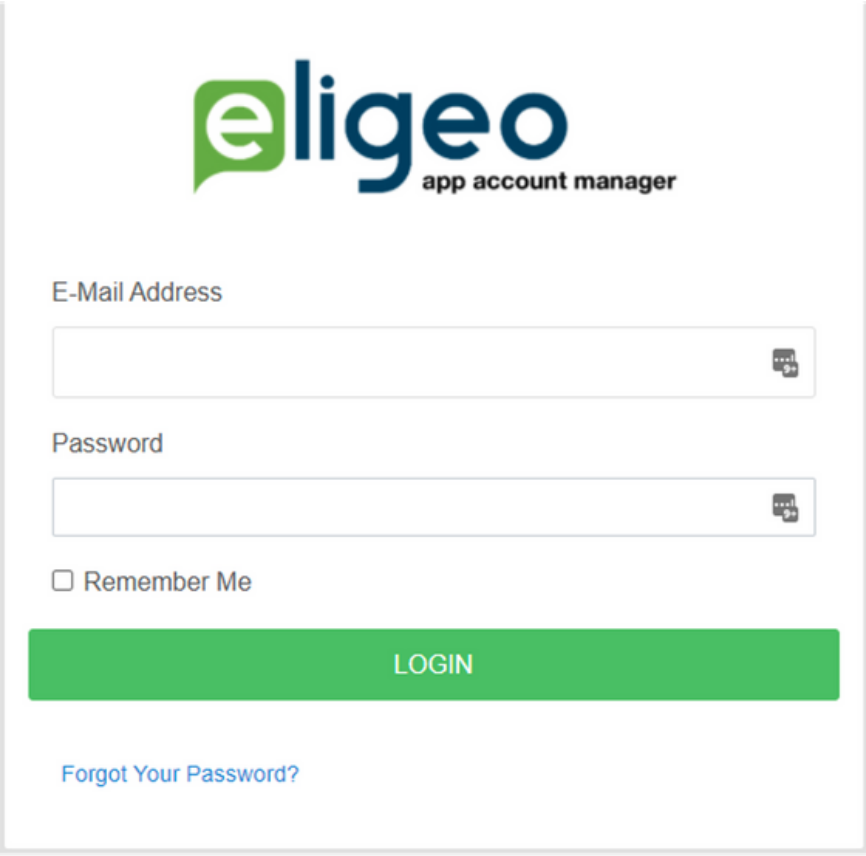
Note: If tasks and meetings boards were not selected on the initial setup these tabs will not work.

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 'eligeo' 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. Below the password field is a checkbox labeled 'Remember Me'. A large green button with the text 'LOGIN' is positioned below the checkbox. At the bottom left of the form is a blue link that says 'Forgot Your Password?'.