USER GUIDE

eCRM Dashboard Widget

Eligeo Business Solutions

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

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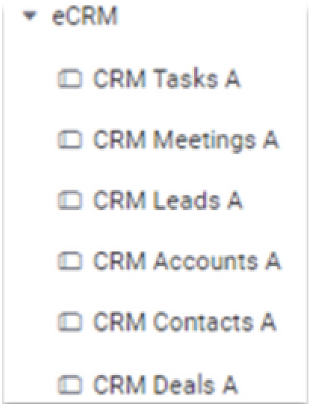
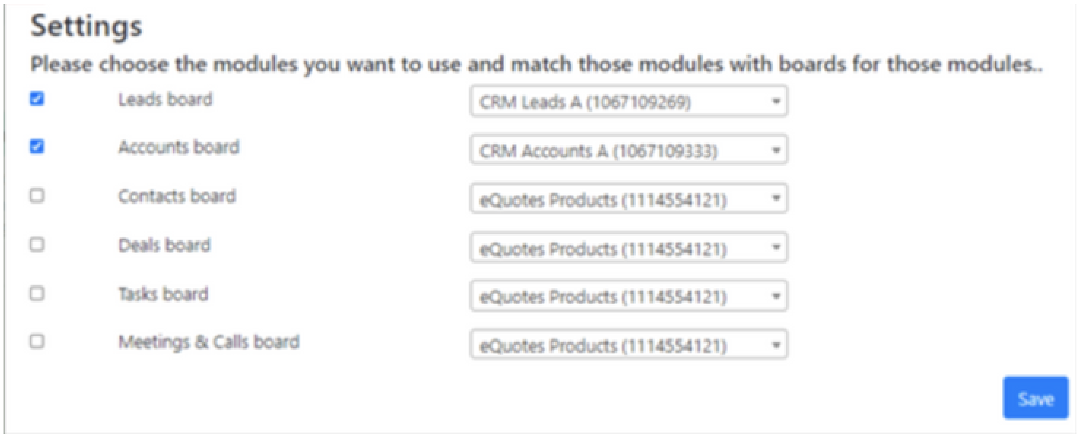
INSTALLATION

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.

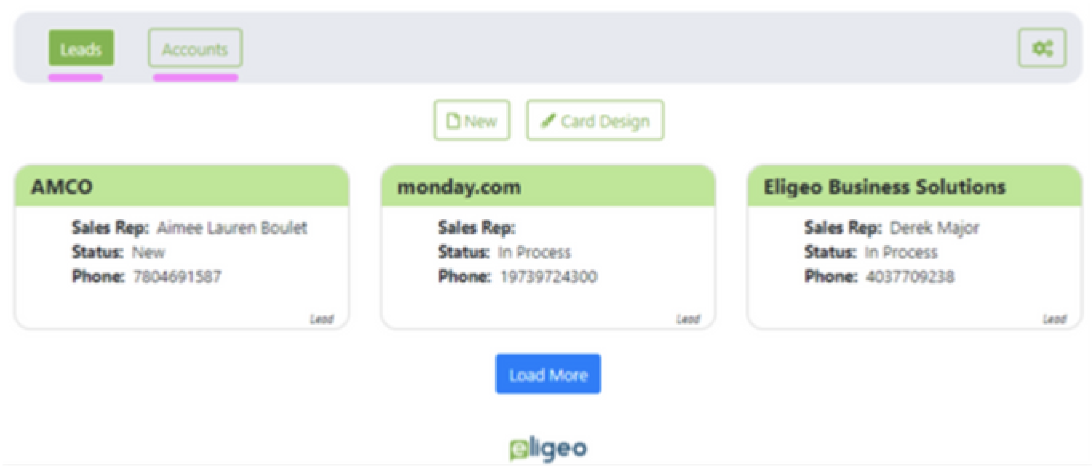
Once the widget is added, you will need to select which modules you want to pair to the matching boards.



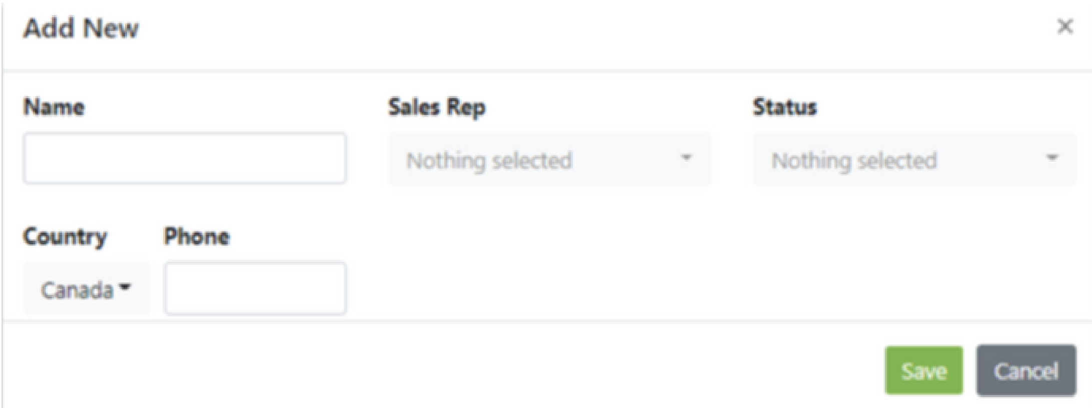
If you need to change the board selections, you can do so by clicking on the gear icon.

USING ECRM

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

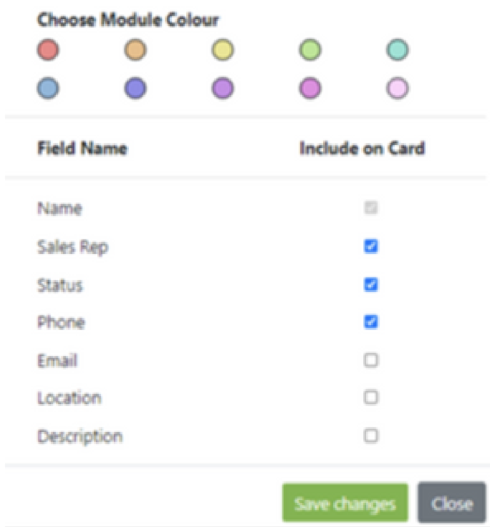


You can add new records directly from the widget.

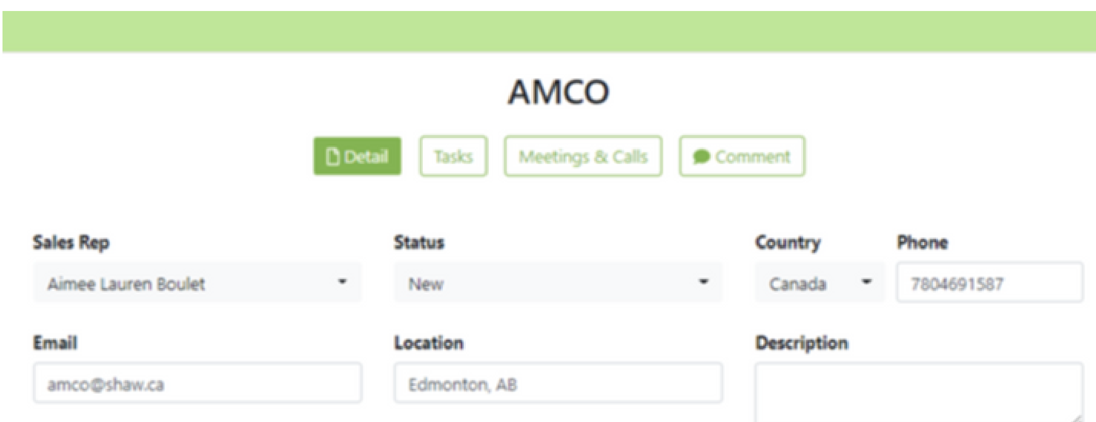


USING ECRM (CONT.)

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



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



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.*