EQUINET CRM User manual for members

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Account activation and first time login

The registration of your organizational account to Equinet CRM will be done by Equinet staff. You will get a notification via email from crm@equineteurope.org. It is possible that the email will land in your SPAM folder. To avoid it you can ask your IT support to add our dedicated IP address (185.7.35.17) to the email whitelist. If added future emails form Equinet CRM will go straight to your inbox.

In the email you will find a one-time-login link. Please follow this and set your password. Please provide a strong password which does not match any other passwords you are using.



If you filled the 'Password' and 'Confirm Password' fields, please scroll down and click on to the 'Save' button. A green message will appear if the set of the password was successful.

Apart form your password you can change your email address and your organisational data here. Although we suggest that you update your password only this time, and after you successfully saved it you could proceed with updating your data. You can find a detailed chapter about updating your data here.

After set, you can use your username and password to login in the future. Your username you can also find in the email.

Log in to Equinet CRM

In order to login you need to call the following link: https://crm.equineteurope.org/user/login

Equinet Contact Management System

Log in Log in with Windows Azure AD Username * Enter your Equinet Contact Management System username. Password * Enter the password that accompanies your username. Log in

Please fill in your username and password and click on the "Log in" button in order to use Equinet CRM. Following the login you will be redirected to the home page.

The CRM homepage

From the CRM homepage you have access of the contact information of Equinet's membership. The data is structured by working groups and clusters. You can navigate between the different working groups by using the membership menu on the top of the page. By default, you will see the main contact information of the member organisations.



By clicking any item inside the menu, you will be redirected to the data of the respective group. Then you can filter it by country, and by organisation. You can also ask for primary or not primary contacts only.

Communication WG

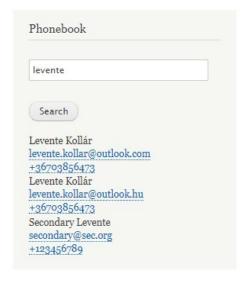


	Organisation name	Name	Job title	Primary	Email	Telephone
AL	Commissioner for the Protection from Discrimination	Darian Konomi	Specialist	√	darian.konomi@kmd.al	(+355) 69 203 5270
АТ	Ombud for Equal Treatment	Monika Ritter	Legal advisor, communication	✓	monika.ritter@bka.gv.at	(00431) 5320244
BE	Unia – Interfederal Centre for Equal Opportunities	Lise Eelbode	Collaborator Communication	√	lise.eelbode@unia.be	+3222123041
BE	Institute for Equality between Women and Men	Liesbet Stevens	Deputy Director	√	Liesbet.STEVENS@igvm.belgie.be	003222334045

Both on the top and the bottom of the view you can find an "Export list" button, which will export the current list in .csv extension. This file format is readable by Microsoft Excel and any other standard office application.

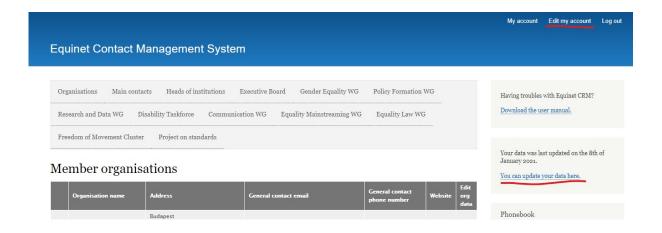
The phonebook

If you are looking for somebody's email address or phone number, the quickest way to get it is the phonebook. You can always find the phonebook at the right sidebar. Just type the name and click on the 'Search' button. You don't need to know the full name, the search function is working from 2 characters.



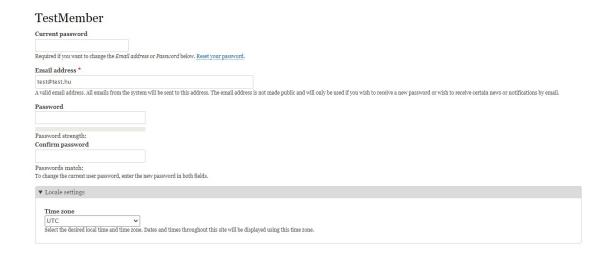
Updating the organisation data

To update your organisational data, need to navigate to your profile by clicking to 'Edit my account' on the top menu. You can also find a direct link in the right sidebar or can call the url directly: https://crm.equineteurope.org/user/edit



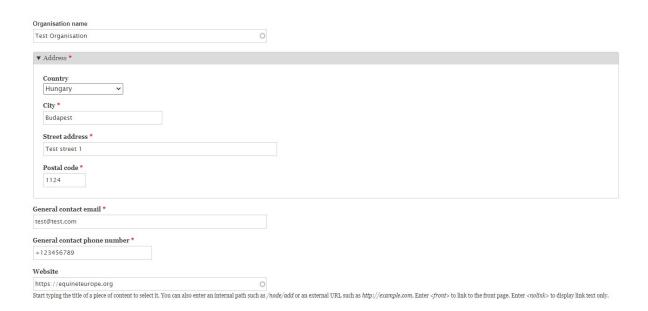
User data

The first section is the user data, where you can update your password, the email address of your CRM account, and your time zone. In order to change the email address or the password here you need to type the old password.



Organisational Data

The next section is the organisation data, where you can modify the name of your organisation, the address, the general contact email and the general contact phone fields.

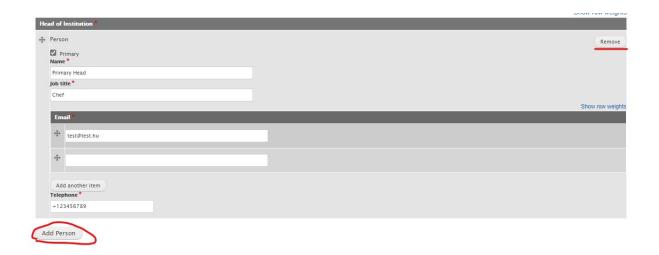


Please keep in my mind that the username and the name of the organisation are two identical fields, and also your general contact email does not necessary corresponds to your account email.

Working groups and clusters

For the different working groups and clusters, but also for the head of the organisations and the board members you can add unlimited persons. Every entity has the following fields: Primary (true or false), Name, Jog title, Email (multiple entries are possible), and telephone.

If you want to add a new person you need to click to the 'Add Person' button, and then fill the data in.



If you want to remove one you need to click on the remove button and then confirm the removal.



All changes must be saved by clicking the 'Save' button on the bottom of the page.