

EQUINET CRM  
User manual for members

v 0.1  
08/01/2021

**Contents**

Account activation and first time login .....3

Log in to Equinet CRM .....3

The CRM homepage.....4

The phonebook.....5

Updating the organisation data.....6

    User data .....6

    Organisational Data .....6

    Working groups and clusters.....7

## 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](mailto: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 from 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.

### TestMember

Email address \*

levente.kollar@outlook.com

A valid email address. All emails from the system will be sent to this address. The email address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by email.

Password

Password strength: Weak

Confirm password

Recommendations to make your password stronger:

- Make it at least 12 characters
- Add lowercase letters
- Add uppercase letters
- Add numbers
- Add punctuation

To change the current user password, enter the new password in both fields.

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 from 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.

## Equinet Contact Management System

Organisations	Main contacts	Heads of institutions	Executive Board	Gender Equality WG	Policy Formation WG
Research and Data WG	Disability Taskforce	Communication WG	Equality Mainstreaming WG	Equality Law WG	
Freedom of Movement Cluster	Project on standards				

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

[Export list](#)

Country  Organisation  Primary

Albania  
Armenia  
Austria  
Belarus  
Belgium  
Bosnia & Herzegovina  
Bulgaria  
Croatia

	Organisation name	Name	Job title	Primary	Email	Telephone
AL	Commissioner for the Protection from Discrimination	Darian Konomi	Specialist	✓	<a href="mailto:darian.konomi@kmd.al">darian.konomi@kmd.al</a>	<a href="tel:+355692035270">(+355) 69 203 5270</a>
AT	Ombud for Equal Treatment	Monika Ritter	Legal advisor, communication	✓	<a href="mailto:monika.ritter@bka.gv.at">monika.ritter@bka.gv.at</a>	<a href="tel:+4315320244">(00431) 5320244</a>
BE	Unia – Interfederal Centre for Equal Opportunities	Lise Eelbode	Collaborator Communication	✓	<a href="mailto:lise.eelbode@unia.be">lise.eelbode@unia.be</a>	<a href="tel:+3222123041">+3222123041</a>
BE	Institute for Equality between Women and Men	Liesbet Stevens	Deputy Director	✓	<a href="mailto:Liesbet.STEVENS@igvm.belgie.be">Liesbet.STEVENS@igvm.belgie.be</a>	<a href="tel:+32222334045">003222334045</a>

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.

Phonebook

Levente Kollár  
[levente.kollar@outlook.com](mailto:levente.kollar@outlook.com)  
[+36703856473](tel:+36703856473)  
Levente Kollár  
[levente.kollar@outlook.hu](mailto:levente.kollar@outlook.hu)  
[+36703856473](tel:+36703856473)  
Secondary Levente  
[secondary@sec.org](mailto:secondary@sec.org)  
[+123456789](tel:+123456789)

## 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>

The screenshot shows the Equinet Contact Management System interface. At the top right, there are links for 'My account', 'Edit my account' (underlined), and 'Log out'. The main header reads 'Equinet Contact Management System'. Below this is a horizontal menu with categories: Organisations, Main contacts, Heads of institutions, Executive Board, Gender Equality WG, Policy Formation WG, Research and Data WG, Disability Taskforce, Communication WG, Equality Mainstreaming WG, Equality Law WG, Freedom of Movement Cluster, and Project on standards. A section titled 'Member organisations' contains a table with columns: Organisation name, Address, General contact email, General contact phone number, Website, and Edit org data. The first row shows 'Budapest' in the Address column. To the right, a sidebar contains a link 'Having troubles with Equinet CRM? Download the user manual.', a message 'Your data was last updated on the 8th of January 2021.' with a link 'You can update your data here.' (underlined), and a 'Phonebook' link.

### 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.

#### TestMember

Current password

Required if you want to change the *Email address* or *Password* below. [Reset your password.](#)

Email address \*

A valid email address. All emails from the system will be sent to this address. The email address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by email.

Password

Password strength:  
Confirm password

Passwords match:  
To change the current user password, enter the new password in both fields.

▼ Locale settings

Time zone  
UTC  
Select the desired local time and time zone. Dates and times throughout this site will be displayed using this time zone.

### 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.

Organisation name

▼ Address \*

Country

City \*

Street address \*

Postal code \*

General contact email \*

General contact phone number \*

Website

Start typing the title of a piece of content to select it. You can also enter an internal path such as `/node/add` or an external URL such as `http://example.com`. Enter `<front>` to link to the front page. Enter `<noLink>` to display link text only.

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.

Head of Institution \*

Person

Primary Remove

Name \*

Job title \*

Email \*

Telephone \*

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

Head of Institution Show row weights

Deleted Paragraph: *Person* Confirm removal

Add Person

**All changes must be saved by clicking the ‘Save’ button on the bottom of the page.**