Guide to setting up OGX CRM

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0. Introduction

This short guide outlines the steps you have to follow in order to be able to use the newly developed **OGX CRM** tool to facilitate tracking and managing of EPs.

Each **VP OGX** should read this guide and oversee the onboarding process for the rest of the OGX members.

1. Join your LC's board on Trello

Click on the link that **matches your LC**. If you don't already have a Trello account, you will be prompted to create one (preferably using your *@aiesec.net* address).

LC name	Link
Basel	https://trello.com/invite/b/GjwaQMYv/c2ca04b851a001751f4e9ff6e8ed03ee/ogx-crm-lc-basel
Bern	https://trello.com/invite/b/RpEBYnCI/7c912f36456f428130c9b4c3b65a1fd4/ogx-crm-lc-bern
Fribourg	https://trello.com/invite/b/o1qf9q7d/f26e3bd72bf2486d025925cbcd5afcf1/ogx-crm-lc-fribourg
Geneva	https://trello.com/invite/b/xcm31TyR/56127ea11b281ff8029b0d5ab796bf42/ogx-crm-lc-geneva
Lausanne	https://trello.com/invite/b/x3CDeEjP/adaa7a3ae203513a56cd170f44d7259b/ogx-crm
Lucerne	https://trello.com/invite/b/zRzNG3vw/56f11132043c07760050f4945a256d90/ogx-crm-lc-lucerne
St. Gallen	https://trello.com/invite/b/y7dVz29b/e4c224946ad1e04e03a2c1b076f967ac/ogx-crm-lc-st-gallen
Zurich	https://trello.com/invite/b/FHja6T3T/7d62872c6d211c45ea810f8597d8426b/ogx-crm-lc-zurich

2. Fill in the required information on the website

1. Navigate to https://ogx-crm.ch/ and log in using the credentials you would use to log in under http://expa.aiesec.org/.

   You should see a screen with information about the latest synchronization from EXPA to Trello:

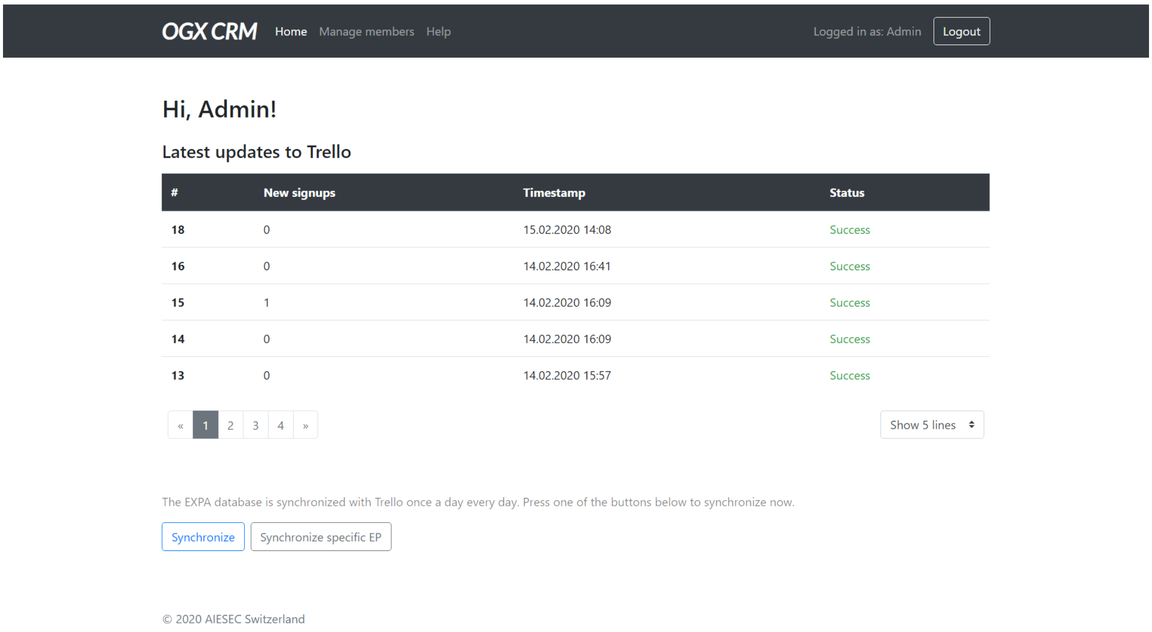
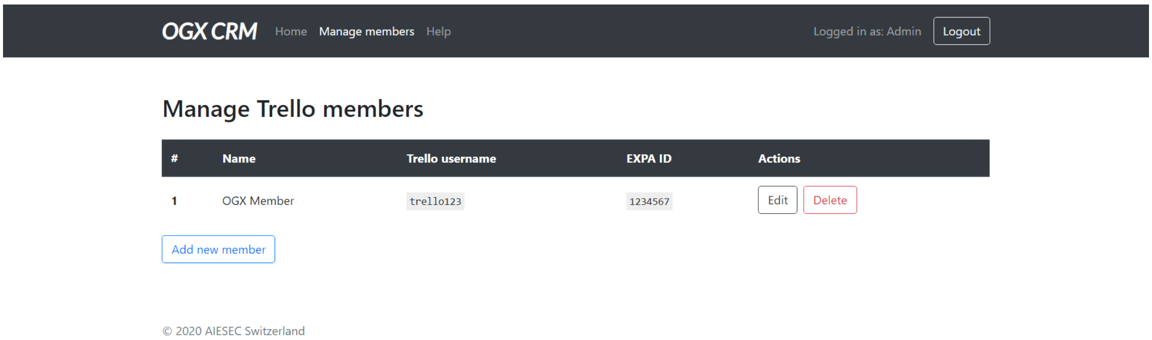


Figure 1: view of dashboard with information on latest synchronizations. The tool synchronizes new sign-ups to Trello once a day.

2. Then, navigate to **Manage members**. The screen should look something like this:



This is where the link between EXPA and Trello is set up. The **VP OGX** should add information for each OGX member:

1. Full name
2. Trello username (the one they used to join the Trello board)
3. EXPA ID (go to https://expa.aiesec.org/people, search for the member, and copy their ID)

3. Organize your EPs on Trello based on their current status

Go to Trello and order your EP cards based on their stats. All EPs are initially added to the 'Signed Up' list on Trello. If you have already processed some EPs, please move them to the according list.

4. Set up Trello notifications on Slack

Trello offers a seamless integration of its platform in Slack, if your team is using this tool to communicate. On your Trello board, click on *'... Show Menu'* in the top right corner to open the menu, then click on '*Power-Ups*'. Search for '*Slack*' and link your LC's workspace with Trello. You can then add custom notifications to you OGX channel, such as when a new sign-up card is added to the board, or a new member is assigned to the EP.

5. Check out the current features

Every time a new EP signs up on EXPA, the card is automatically synchronized to Trello. Every card contains the following data:

- Date of birth, if provided
- Phone number, if provided
- Email address
- Sign-up date
- Due date → reflects last contact date
- Link to EP profile on EXPA
- Profile picture, if provided
- List of assigned members

6. Watch out for feature updates!

For now, the tool simply handles the synchronization of EXPA with Trello. Over the course of the next few weeks to months, the following new features will be added to the tool:

- Once a card is moved to a specific list, an email is automatically sent to the EP. For instance, when the card is moved from 'Signed Up' to 'Assigned', a personnalized email is sent from the managing member to the EP, and the card is moved to the 'First Email Sent' list. The email templates will automatically be filled out with the EP's and managing member's information (name, phone number, email, etc., as required), and the templates will be customizable.
- If the EP applies for an opportunity on EXPA, the card is automatically moved to 'Applied', 'Approved', or 'On Exchange' list, and a comment describing the action is added to the card.
- Automatical update of the card due date to reflect the last contact date.
- Assigning a member to an EP on Trello is synchronized to EXPA.
- Other features, as requested

7. Questions?

In case anything is unclear, or if you find a bug or want to request a new feature, feel free to reach out to me:

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8. Enjoy!