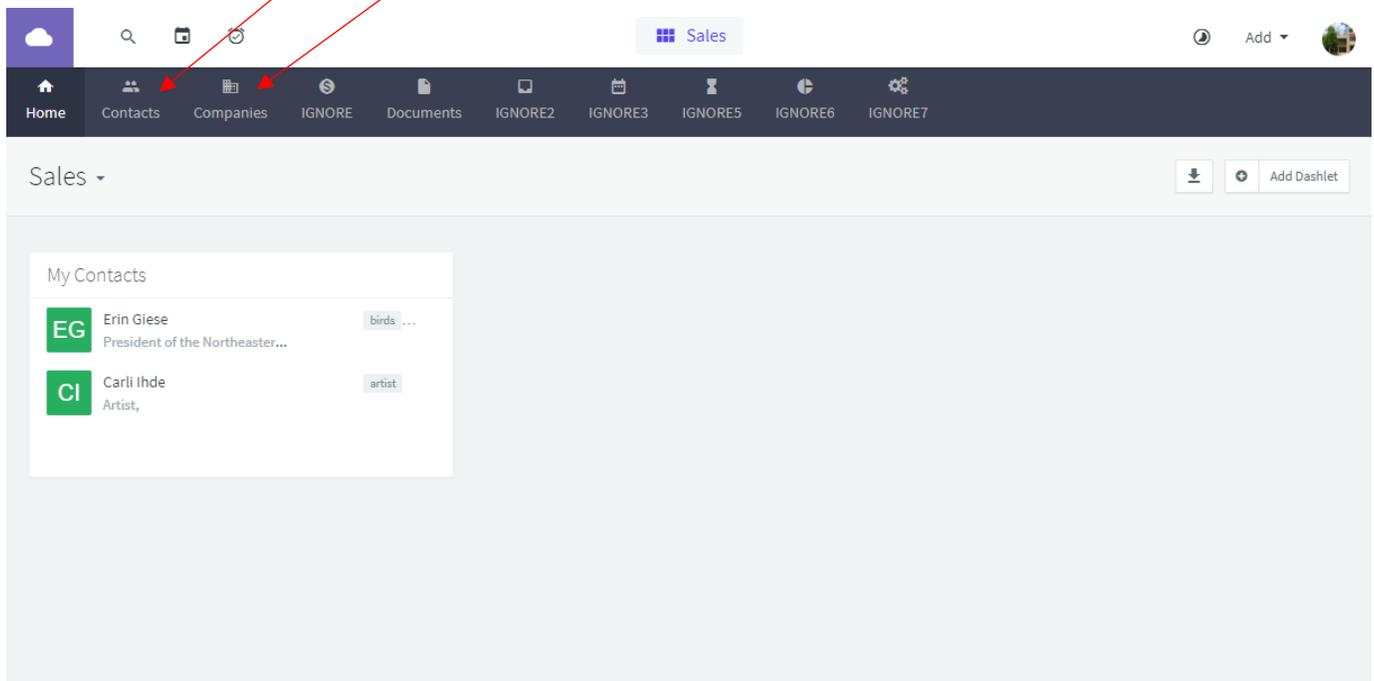# Agile CRM Instructions

Purpose: Agile is online CRM (customer relationship management) software that BCL uses to track and share local contacts for library programs across the system. Please add any contacts that you have that others may find useful for the future.

URL: https://www.agilecrm.com

> **NOTE:** If a second user logs in with the same username, the first user will be automatically logged off. Unfortunately there is no way to turn off this feature, so it is a good idea to not leave Agile open when you are not using it and to save your work often.

Home Tab: This is the dashboard seen when first logging into the site and can also be reached by clicking on Home or the purple cloud in the upper left corner of the screen.

- Click on the magnifying glass in the upper left corner to search by a keyword
- A grey bar along the top lists Contacts, Companies and all the Ignore options (anything listed as IGNORE are features that we are not using but cannot be removed from the menu).
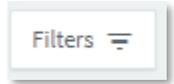- Click on the Contacts or Companies options to see the list of system-wide contacts.

Browsing Contacts & Companies:

- Individual performers/presenters are listed under Contacts, while companies and businesses are listed under Companies.
- You can filter what you see using the options on the right side of the page. If these aren't showing, click on the "Filters" button in the upper right.

- Click on the individual or company names to open up the full description for the contact and see their information and staff notes.
- Viewing Contacts:
  - When you click on a name or company, everything you need will be right there. The contact information is along the left and a timeline with notes & tags is on the right.
  - To see just the Notes (or to add a note), click on the Notes tab.
  - Documents can also be uploaded (such as promotional signs, logos that should be used, etc.) – see the Documents tab.
  - All of the other options (Events, Tasks, Deals, etc.) should be **ignored** and not used. The Events tab in particular should be avoided – if you add an event you can inadvertently send an email to the contact from Agile, which would be very confusing to the contact!
- Permission to Contact: Sometimes a company/performer prefers to be contacted first by their primary library contact rather than a random library staff member. This field is a clear indication whether it's necessary to reach out to the BCL contact before contacting the company/performer.

Adding Contacts & Companies:

- Click "Add Contact" or "Add Company" on the far right side to add a performer/presenter or company.

  - Required fields are Name, BCL Staff Contact, Standard Fee (if any), Age Group (Adult, Teen, Children), & permission to contact.
  - Add other pertinent information as necessary.
  - **Tags**: Tags are a great way to add more searching and sorting options. Searching in Agile does not include anything written in the Notes area, so relevant tags will make contacts easier to find later. Use tags that are descriptive but not too narrow (for example, if you had a speaker on container gardening, use "gardening" instead of "tomato plants").
  - **NOTE:** When you include a Company Name when you are adding an individual contact, Agile will automatically create a company listing (so you don't have to add both a contact and a company). So for the vast majority of the time, it makes more sense to add a contact rather than adding a company.
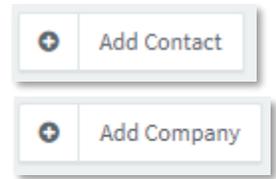
- **Adding Notes and Documents:**

  - After adding a Contact/Company, you can also add notes or upload documents to provide further information. In the notes tab, click on "Add" and then "Add Note" in the upper right to add a note, or "Add Document" in the Documents tab.
  - When you are reaching out to a contact to plan an event or when you schedule a company/performer, please add a note so we don't over-schedule them or ask them too often. Especially if they are volunteering their time, we don't want to take advantage of them, and we don't necessarily want to schedule the same speaker too often in the calendar either.
  - Notes can also be added after an event. Please indicate helpful information for other librarians - length of the program, observations, whether they sold any products (ex. Powers Comics has presented with us but also has sold comics at our Comic-Con), previously used calendar descriptions, etc.
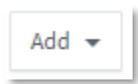
  Below is an example of a note that was added after a program was completed. The event info (title, date/time, location, description, event type and age group) was copied and pasted directly out of the public SignUp calendar.

Timeline	**Notes**	Events	Tasks	Deals	Campaigns	Web Stats	Mail	Documents	‹ ›

Notes   Add ▼

Friday Night Program At SW (Terra Fewless/Andrea West)
Had 14 attendees (landed on same night as Brewers playoff game), included scones from Monzu Bakery (they agreed to special library pricing) & coffee from Kavarna (also special pricing). Would repeat - get more decaf coffee.

Live: Kurt Gunn performs Scenes from a Small Town in Maine
10/19/2018 7:00 PM - 8:00 PM
Southwest Branch Southwest - Meeting Room
Join us for an intimate library living-room show-- Kurt Gunn will perform songs from his album inspired by Stephen King's novel Salem's Lot. Each song deals with a specific scene in the book, a classic tale of good vs evil. Fresh brewed local coffee & bakery make this the perfect fall evening.
Event Type(s): Live Music
Age Group(s): Adults, Tweens & Teens

📅 7 months ago