INSTRUCTIONS FOR THE "CHECK LIST" WIDGET

The widget is designed to organize the tasks of your business processes. The main features of the program are:

1) Setting tasks in the transaction card for individual users or groups of users;

2) Binding of amoCRM task entities with the "check list" widget;

3) Automatic change of stages in funnels on condition of check lists fulfillment;

4) Prohibit changing stages when tasks from checklist are not completed;

5) When setting tasks for the checklist, it is possible to create a description and hint to the task;

6) Ability to add a button to return to the selected stage according to the settings;

Learn more about the widget on our website:

https://kommogen.com/widgets/

For tech support questions: +847587660 (calls and WhatsApp)

gen@kommogen.com

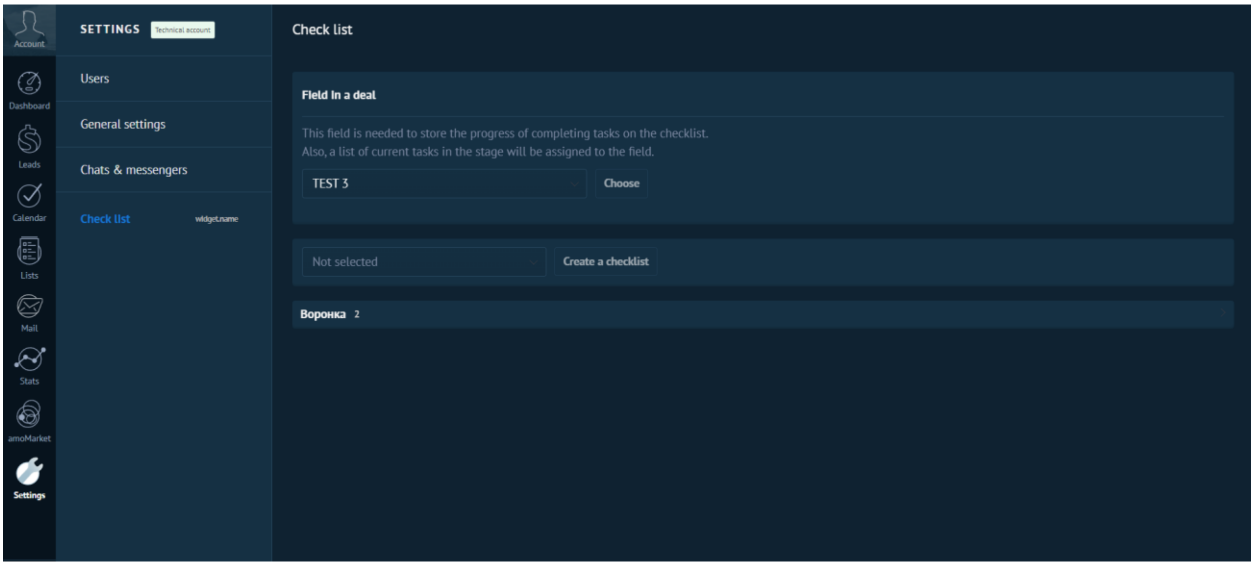
Multifunctional checklist, allows in a transaction to control and progress of the tasks set by the system or managers for the staff

Working with the widget

1) Installed the widget in amoCRM, following the instructions

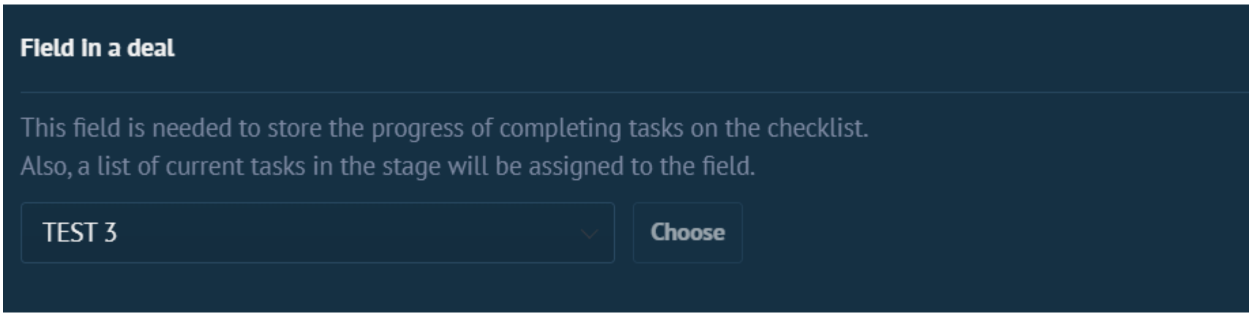
2) Then go to the settings, and select check list

Image. 1. Settings



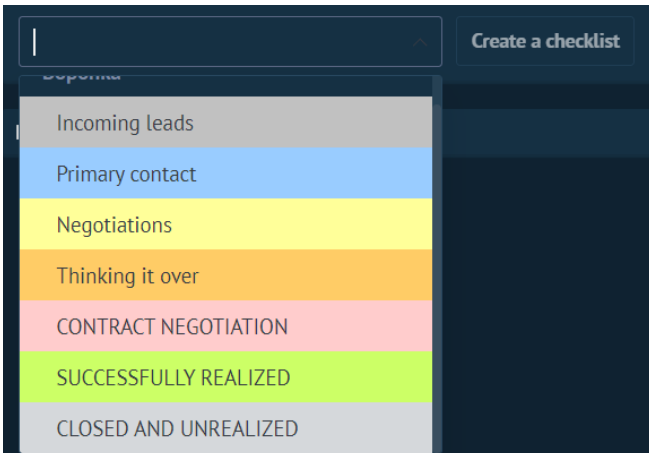
3) In order to start working, we need to select a field in the transaction, first we create the field we need. This field is needed to store the progress of tasks on the checklist

Image. 2. Field in the transaction



4) After that, we create the checklist, with which we will work, select the funnel and stage we need.

Image. 3. Creating a check list

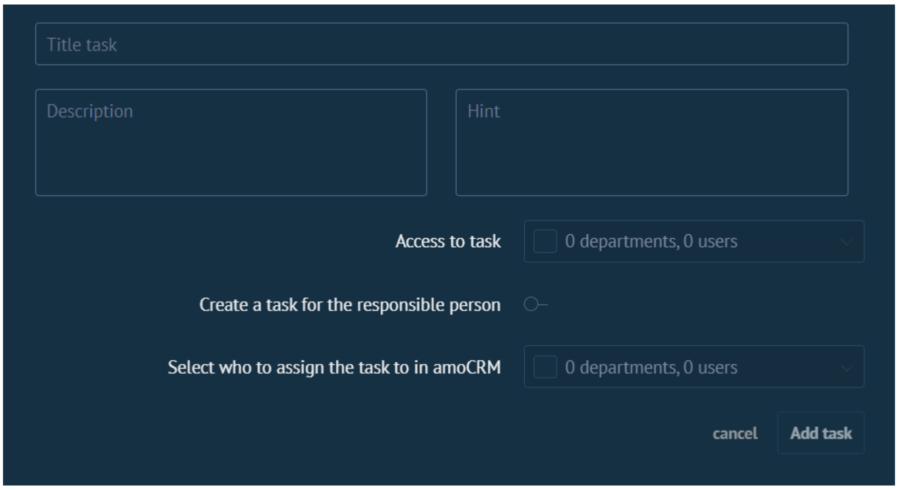


5) Next, we start customizing the tasks for our needs, to do this we select the "Add task" item

Image. 4. Add task

After that, we start creating tasks for our needs

Image. 5. Task settings



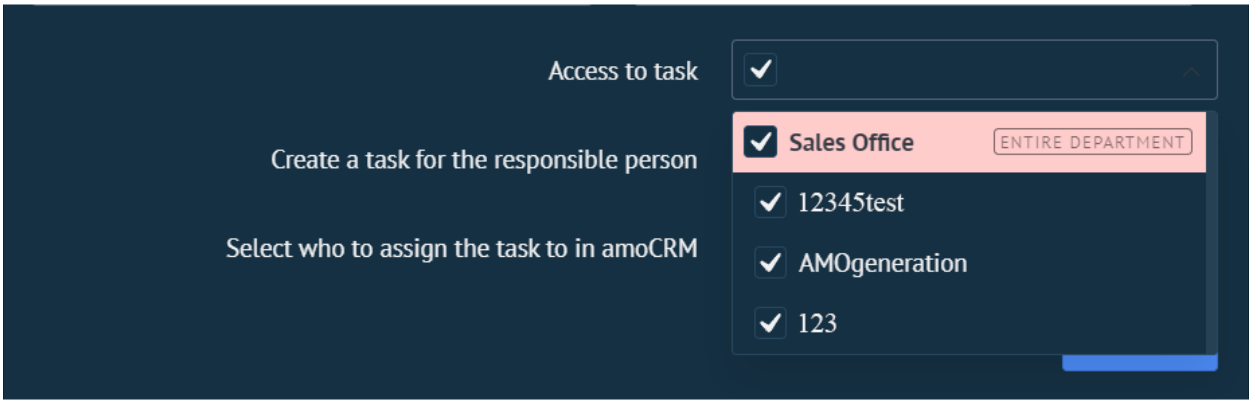
6) Detailed description of the "Add task" item

- As we can see on the previous screenshot, there are several fields that need to be filled in for more precise work

We come up with the name of the task, then its description and optionally we also create hints for us or our managers regarding this task to reduce the number of questions when performing it.

- Next, the field "Access to task", here we choose who can mark this task, who will have access, it can be two people or 3 or the whole department.

Image. 6. Access to task



- Next field, "Create task for responsible person", this field, if enabled, will create a task when moving to the next stage, for those whom we have marked earlier, thanks to it will be created every time the tasks that we have set up

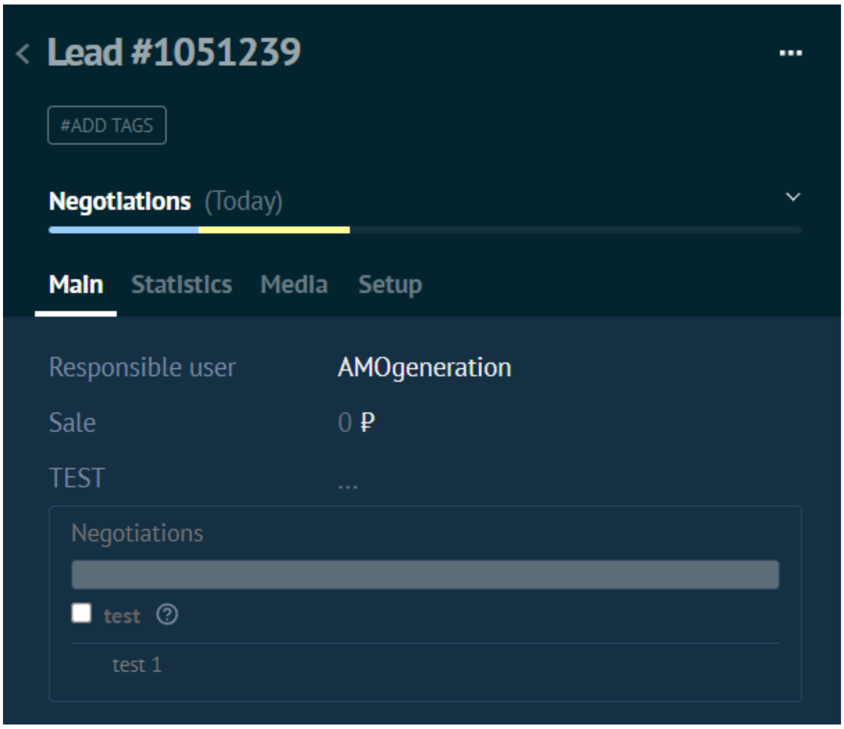
-Field "Choose on whom to set a task in amoCRM", here we choose on whom to set a task, the whole department or on one or several people.

7) To edit the task, if we want to change something, we press this button

Image. 7. Editing a task

8) After these settings, when creating deals or adding deals to this or that stage, the tasks that we have set already in the checklist, will be automatically created with the parameters we need, to look at the progress of execution, you can directly in the card deal

Image. 8. Working with the deal itself using the widget

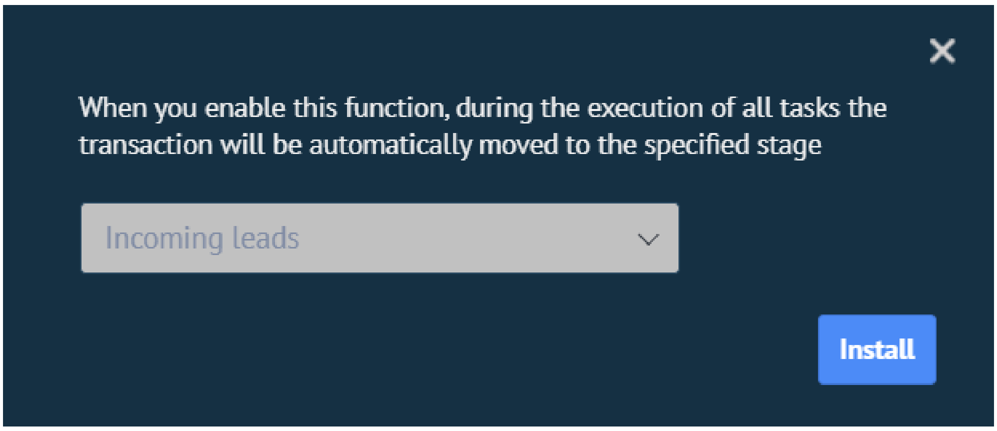


*Note, for correct operation, you should be sure to perform tasks or delete them so that they do not accumulate too much

9) Autotransition works as follows

In the checklist this function can be configured in this field

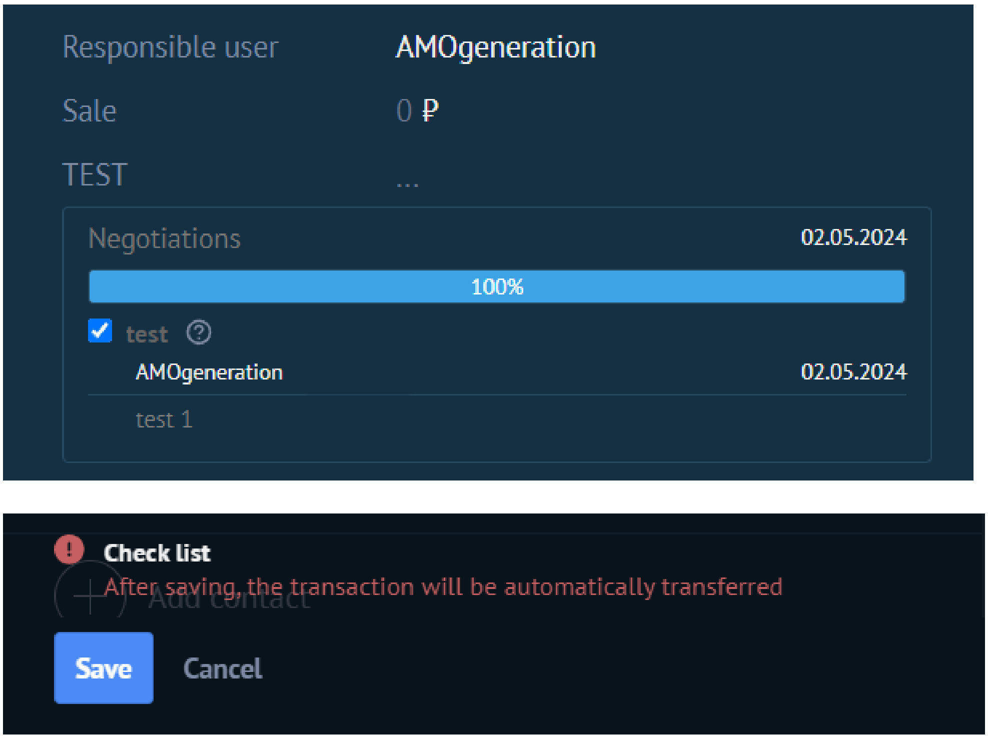
Image. 9. Autotransition



After all the settings in this field, after all the tasks are completed, the deal will be moved to the stage we specify

Further, if we go to the deal itself, we check the checklist task that we created earlier, if we check the checkbox, after saving the deal that we have specified, the system will also warn us about it.

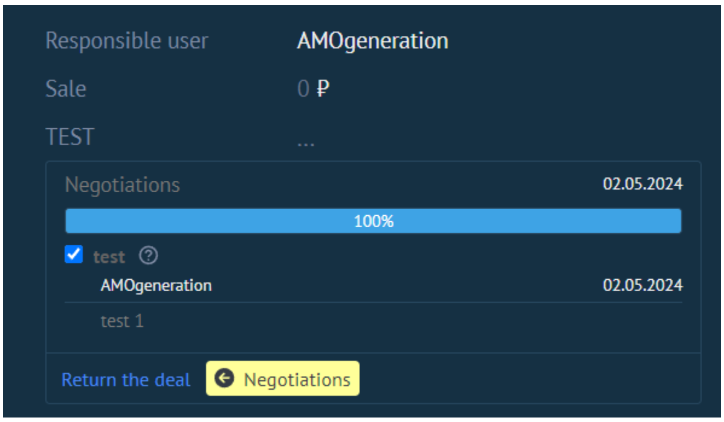
Image. 10. Operation of auto-transition in a deal



Accordingly, after performing these actions, the transaction will be moved to the next stage, with its own tasks and users, which we can also configure in advance in the Checklist

10) If we want to return the task back, after moving to the next stage that we have specified, the corresponding button will appear, which returns the transaction to the previous stage.

Image. 11. Returning a transaction to the previous stage



Also the main thing is not to forget to complete tasks, so that they were not too many, or, in the settings of tasks, which are in the checklist, in the field "Create task for responsible", turn off the button

11) There is also a function that prohibits the transition to the next stage, if all the tasks that were previously set are not completed, to enable it, press this button.

Image. 12. Prohibit transition to the a new stage