

ePlanner

Created by MyCRM Ltd

ePlanner

User guide

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Description

EPlanner is a solution for Microsoft Dynamic CRM. EPlanner enables the user to display the Activities present on the CRM system in an intuitive way. It also allows the user to reschedule the Activities with a simple drag and drop interface.



EPlanner

The ePlanner solution has four distinct sections all of which allow the user to interact with the Activities with increasing specificity.

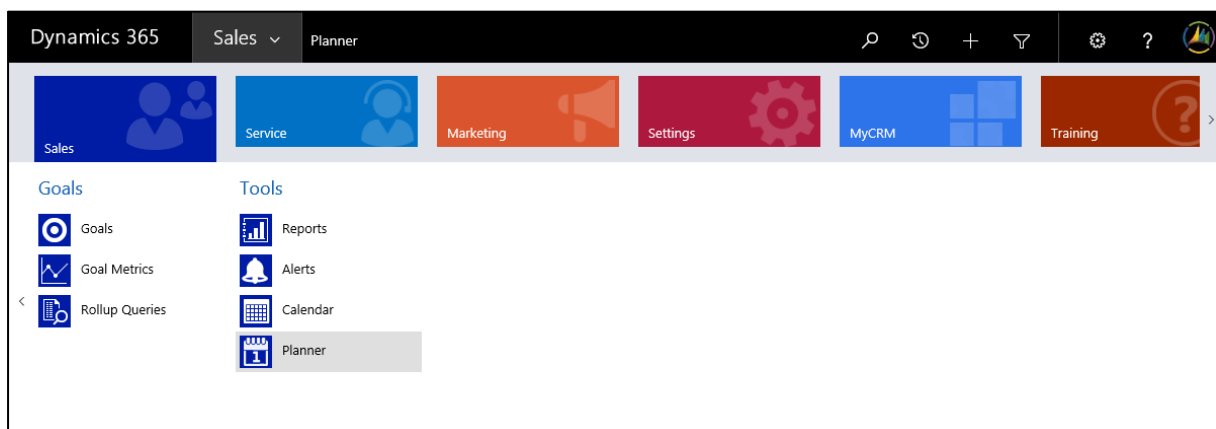
EPlanner has five time periods in which to view the Activities held in the system.

1. The Agenda view gives the highest level overview of the Activities for the following days.
2. The Day view shows a single days Activities displayed in descending time order.
3. The Week view shows the seven days (Saturday to Sunday) around the currently selected date.
4. The Month view shows a six week block of time. As with the Week view each block runs from Saturday to Sunday.
5. The Three month view shows the currently selected month along with the previous and next months.

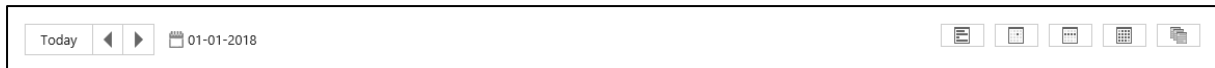
EPlanner will open with the users default calendar view and will display the relevant Activities for that time period.

Navigation

EPlanner can be found under the “Tools” sections of the Sales sections.



Date navigation

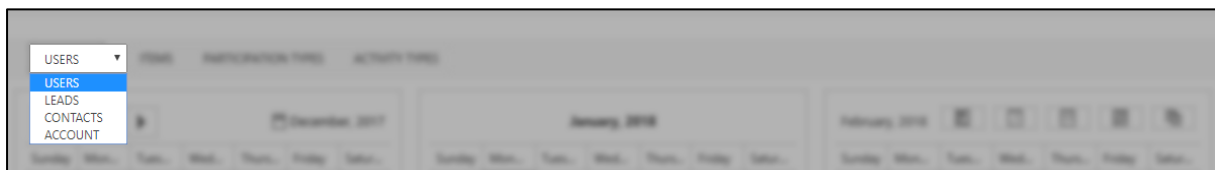


The ePlanner calendar will always open on the current date. The user is able to navigate the currently displayed date (and Activities) either by using the 'Previous' and 'Next' buttons or by selecting a month or year from the dropdown menus.

If the user has navigated away from the starting position they can return to the current date by clicking the 'Today' button.

To navigate longer periods of time the mini calendar can be opened by clicking today's date.

Calendars



The ePlanner administrator is able to create multiple calendars each of which can be setup to show different CRM Entity / Activity relationships.

Business Closures

Each Business Closure is displayed as a dark grey box around the relevant period. If the user hovers their cursor over a Business Closure then the details of the Business Closures occurring that day will be displayed.



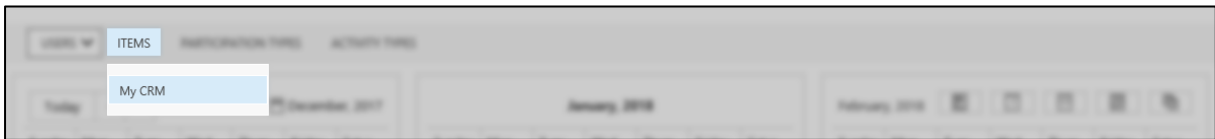
Filters

In order that the user can view only the Activities that they require there are three filters that can be applied. All of the filters are able to be used in conjunction with each other so it is possible to only see a selected Activity type for a selected user where that user is participating in a specific way.

If there are multiple elements selected within a filter group a single element can be selected by clicking on the filter elements name. When a filter element is selected it will highlight all of the relevant Activities while all other Activities will be faded out.

This filter groups allow the user to toggle which Entities are displayed in the calendar.

Items



An Item refers to any CRM Entity that supports Activity records. The Item records are selected by and ePlanner administrator so it is possible that not all of the Entity records will be displayed. This filter group allows the user to toggle which Entity record / Activity interactions are displayed in the calendar.

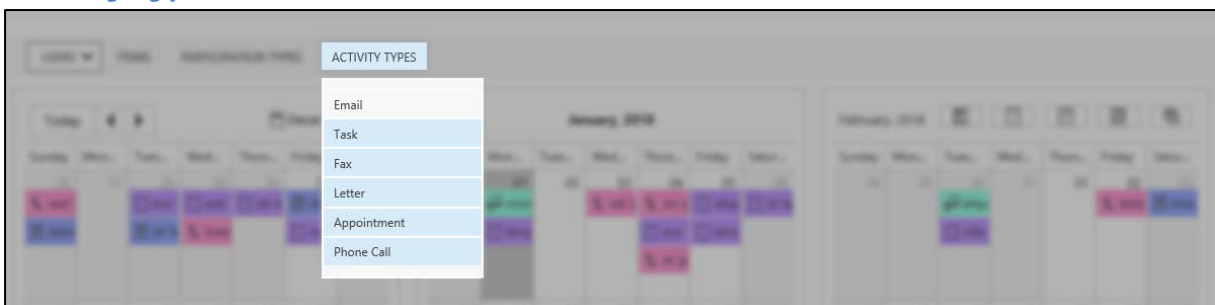
By default all of the Item records will be selected and therefore displayed.

Participation type



This filter group contains the list of ways that an Item can relate to an Activity.

Activity types



This filter group contains a list of the Activities that are available on the CRM system (as with Items, it is possible for the ePlanner administrator to remove specific Activities, so not all of the systems Activities may be displayed.)

This filter group allows the user to toggle which Activities are displayed in the calendar.

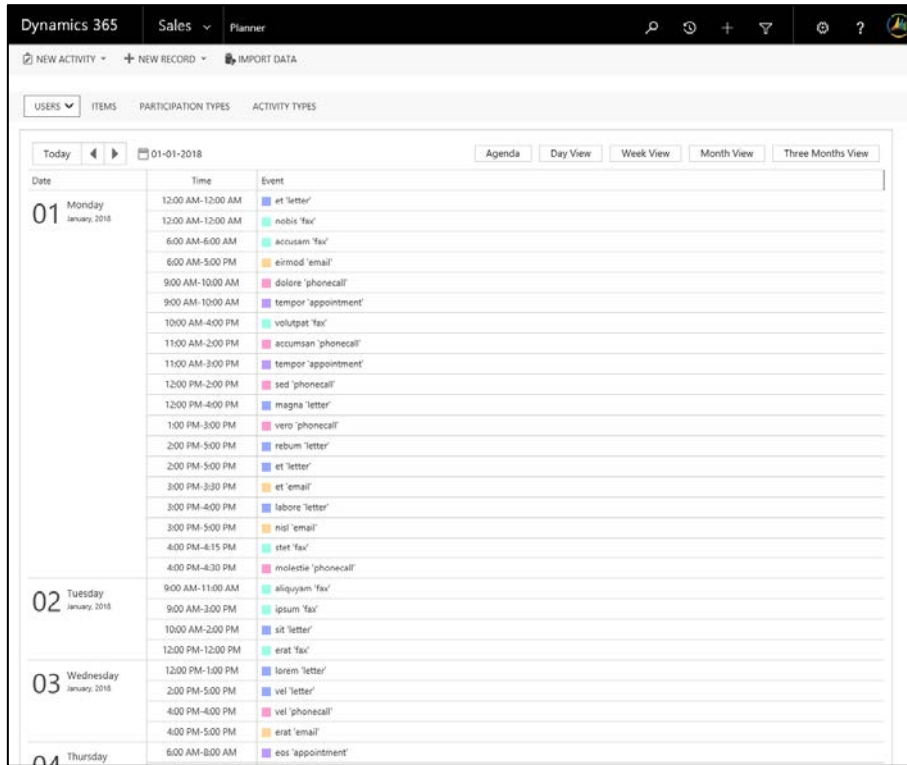
By default all of the Activities will be selected.



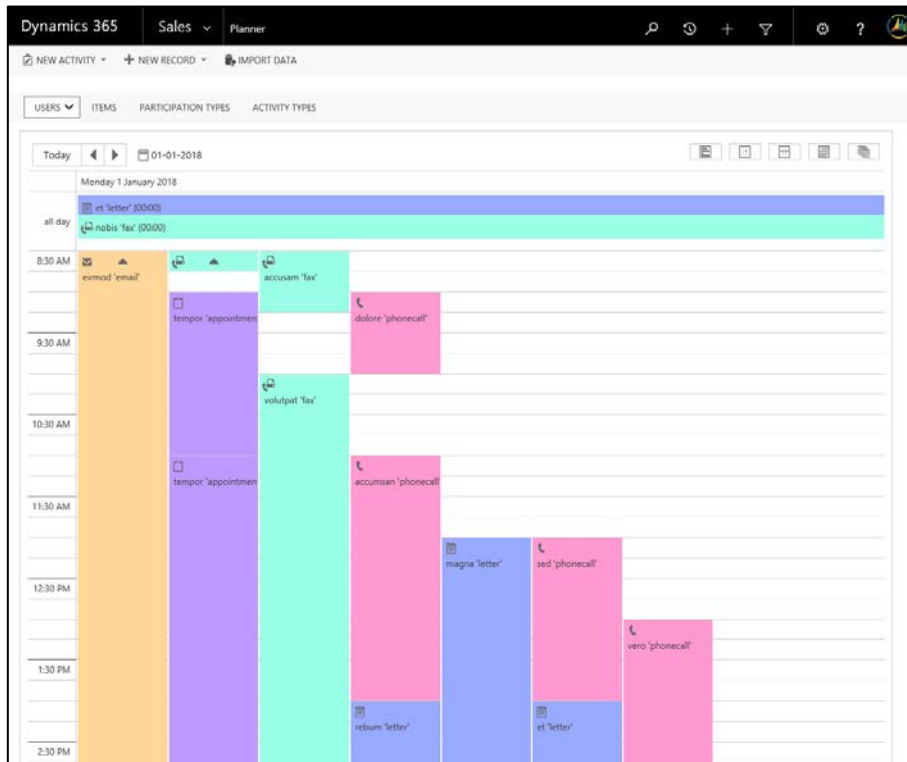
Views

Although each view displays the relevant Activities each will display them over a different time range.

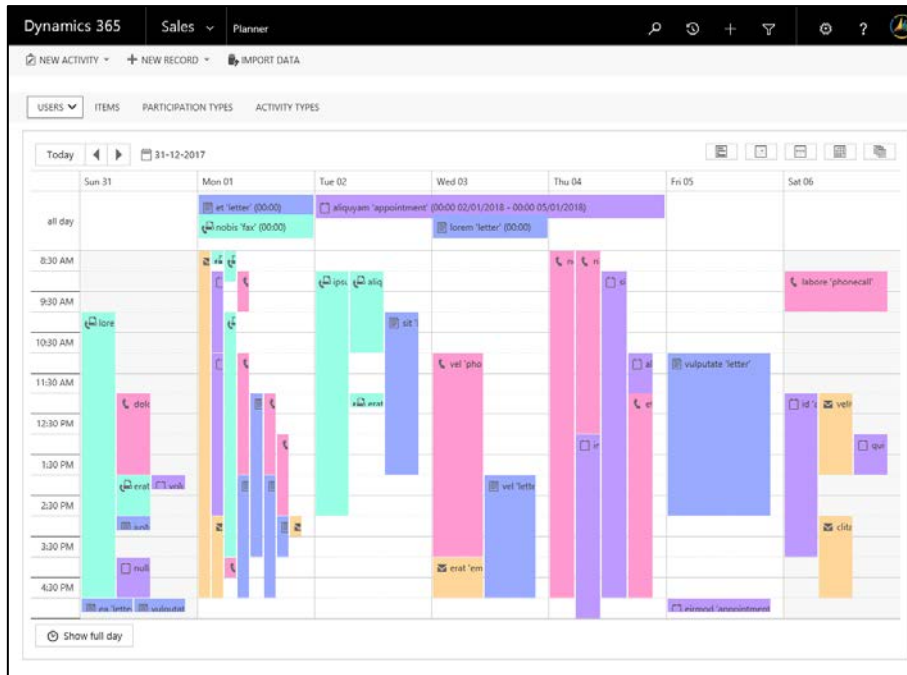
Agenda view



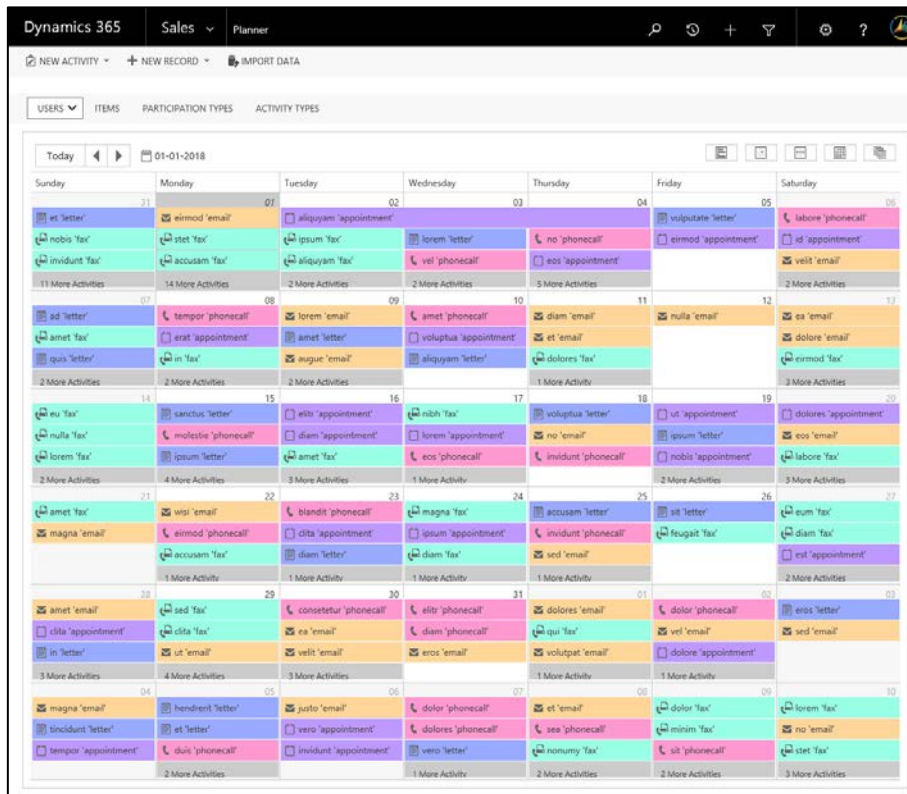
Day view



Week view



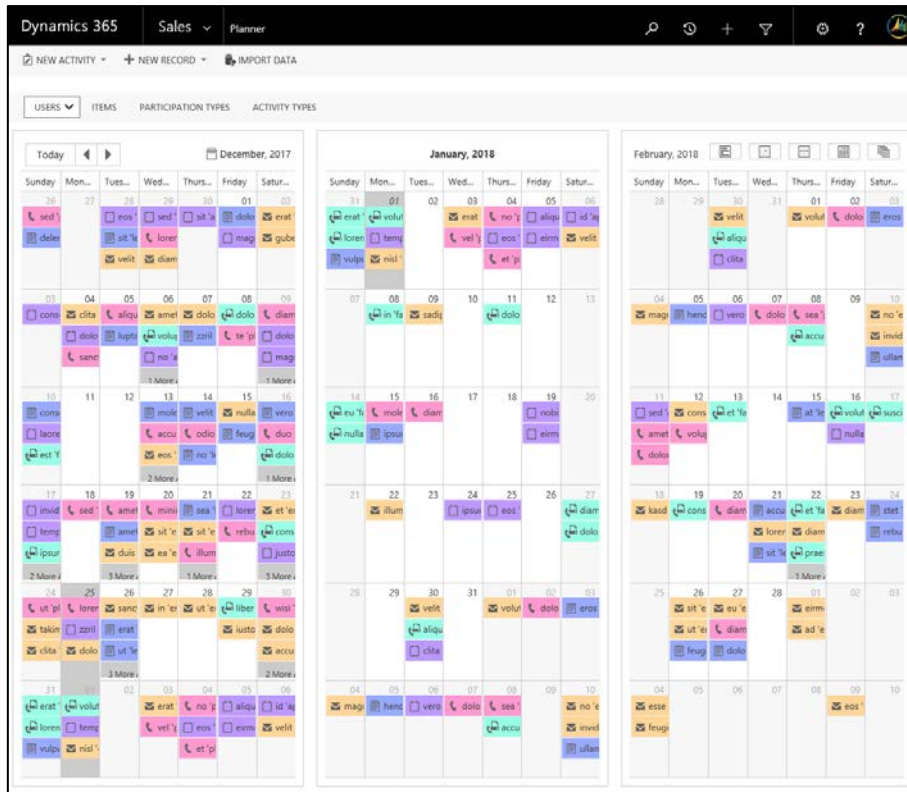
Month views



The current month will always be displayed in its entirety. If there are spaces before the current month then these spaces will be filled with the last days of the previous month. Similarly if there are spaces after the current month then these spaces will be filled by the first days of the next month.



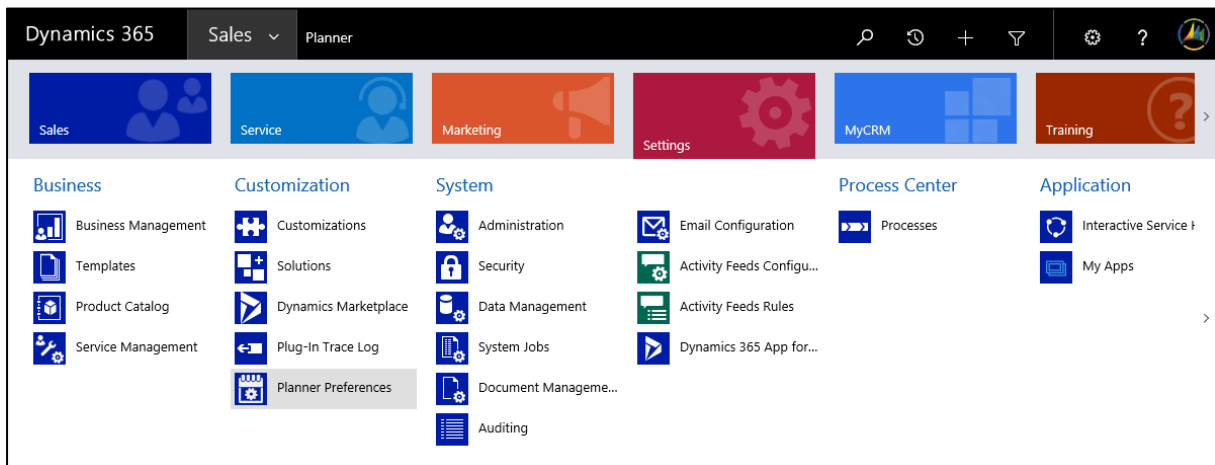
Three months view



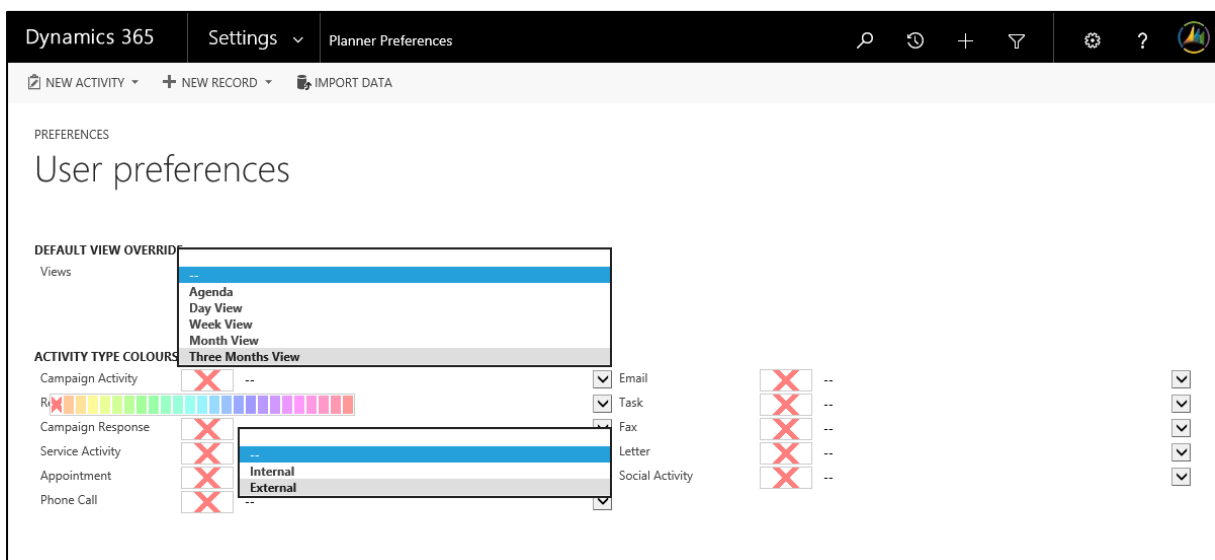
All three of the months are versions of the single month calendar.



Preferences



There are two levels of customisation that can affect the user's calendar. The first is the Planner Calendar which is setup by the ePlanner Administrator and the second is the users Preferences which will only affect the individual's environment.



Default View

The initial calendar view will be set in the ePlanner Configuration, however it can be overridden allowing the user to set their chosen default view.

To set the default view the user simply selects the desired view from the available selection which will automatically update the user's Preferences.

Activity Types

The ePlanner administrator can choose which of the Activity types are displayed in ePlanner. The user will have the option of setting the colour and launch option for each of the displayed Activities.

Recolouring

The user is able to set the colour that will be used to represent each of the displayed Activities across all of the ePlanner views.

In order to select an Activity colour the user can click on the current colour (next to the Activity name), this will launch a colour picker showing the available colour pallet. The user can click on any colour from this selection and it will then be applied to each relevant Activity across all of the ePlanner views. Once a colour has been selected it will be automatically updated and applied.

To remove, a previously selected colour, from an Activity the user can click open the colour selector and click the red cross in the first cell, this will re-enable the calendars default colour option.

Launch options

The user is able to choose what happens when an Activity is selected across all of the ePlanner views. There are two options, the default is that it will open in the browser window occupied by ePlanner, however if the Activity's "External" option is selected then each time the relevant Activity is opened in an ePlanner view it will open in a new browser window.

