

ePlanner

Created by MyCRM Ltd

ePlanner

Administration guide

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Description

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

This document covers the ePlanner configuration options available to a Microsoft Dynamic CRM administrator and the impact of these options at the user level.



Introduction

The administration Configuration section is used to select which elements of the CRM to expose to the ePlanner users.

Along with the ePlanner Configurations each user has their own Preferences section, where they can change some of the more personalised options such as the default view, activity colours and launch options.



Security Role

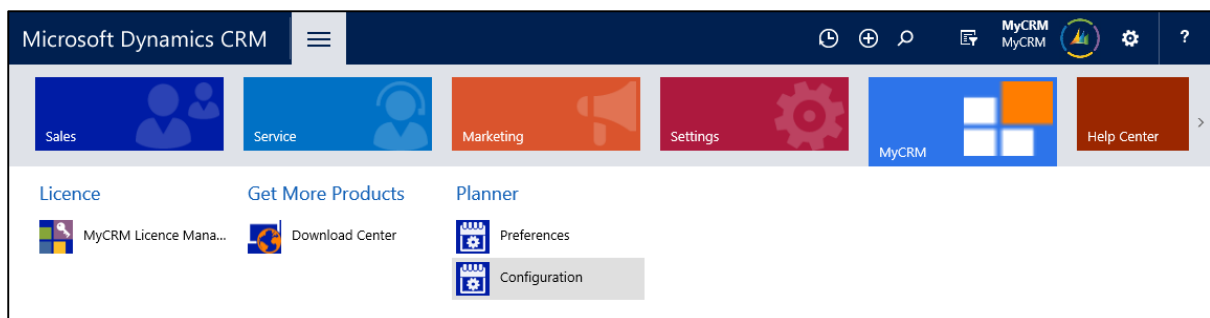
EPlanner contains two Security Roles, “ePlanner Administrator” and “ePlanner User”.

If the user requires access to the Configuration section as well as the Preferences section and ePlanner then they will need the “ePlanner Administrator” role.

If however the user just needs access to ePlanner and the personal Preferences section then they simply require the “ePlanner User” role.

Navigation

Only a Microsoft Dynamic CRM user with “ePlanner Administrator” role can navigate to the ePlanner’s configuration section. Once the ePlanner solution has been installed the Configurations can be found under the “MyCRM” menu.



Population

Before ePlanner can be used it must read the Microsoft Dynamic CRM environment that it has been installed on. When the Configuration section is first accessed it will search the environment for the Entities, Activities, Users and Participation types. Due to the amount of time that it takes to read these elements, each is buffered on the initial load, therefore if any of these details change over time the relevant section should be reloaded.

Configuration

Microsoft Dynamics CRM
Sales | ePlanner

NEW ACTIVITY | NEW RECORD | IMPORT DATA

Configurations

Default View: Month

Displayed Activities

Name	label	Colour	New window
Appointment	Appointment		<input type="checkbox"/>
Campaign Activity	Campaign Activity		<input type="checkbox"/>
Campaign Response	Campaign Response		<input type="checkbox"/>
Email	Email		<input type="checkbox"/>
Fax	Fax		<input type="checkbox"/>
Letter	Letter		<input type="checkbox"/>
Phone Call	Phone Call		<input type="checkbox"/>
Recurring Appointment	Recurring Appointment		<input type="checkbox"/>
Service Activity	Service Activity		<input type="checkbox"/>
Social Activity	Social Activity		<input type="checkbox"/>
Task	Task		<input type="checkbox"/>

Hidden Activities

None.

ePlanner Views

Name:

Entities: Select an Entity

Views: Select an Entity

Display field: Select an Entity

0 / 0

Participation Types

- BCC Recipient
- CC Recipient
- Customer
- Optional attendee
- Organizer
- Owner
- Regarding
- Required attendee
- Resource
- Sender
- To Recipient

CRM Users

- Alice McMillin
- Julian Dickinson
- Alan Green
- Andrew Thompson
- Angela Gethroford
- Jolene Barnham
- Jameson Bagden
- Wanda L. Lindstrom
- Berty Gunning
- Beverly Smith
- Bonnie Grant
- Wanda Grant

Views

EPlanner displays the Activities found on the current Microsoft Dynamic CRM platform in four different views.






1. Agenda
2. Week
3. Month
4. Three Months

An administrator is able to set the default view for the users. EPlanner also allows the users to override the default view by selecting an alternative in their Preferences.









Activities

Displayed Activities

Name	label	Colour	New window	
Appointment	<input type="text" value="Appointment"/>	<div style="width: 20px; height: 10px; background-color: #f0e68c; border: 1px solid #ccc;"></div>	<input checked="" type="checkbox"/>	
Email	<input type="text" value="Email"/>	<div style="width: 20px; height: 10px; background-color: #8b4513; border: 1px solid #ccc;"></div>	<input type="checkbox"/>	
Letter	<input type="text" value="Letter"/>	<div style="width: 20px; height: 10px; background-color: #fff9c4; border: 1px solid #ccc;"></div>	<input type="checkbox"/>	
Phone Call	<input type="text" value="Phone Call"/>	<div style="width: 20px; height: 10px; background-color: #007bff; border: 1px solid #ccc;"></div>	<input type="checkbox"/>	
Task	<input type="text" value="Task"/>	<div style="width: 20px; height: 10px; background-color: #92d050; border: 1px solid #ccc;"></div>	<input type="checkbox"/>	

Hidden Activities

Campaign Activity	<input type="text" value="Campaign Activity"/>	
Campaign Response	<input type="text" value="Campaign Response"/>	
Fax	<input type="text" value="Fax"/>	
Recurring Appointment	<input type="text" value="Recurring Appointment"/>	
Service Activity	<input type="text" value="Service Activity"/>	
Social Activity	<input type="text" value="Social Activity"/>	

Displaying activities

Due to the open nature of the Microsoft Dynamic CRM environment it is possible that Activity types may have been created that are not pertinent to ePlanner. For this reason it is possible to prevent an Activity type from being shown to the end user in the ePlanner calendar.

To remove an Activity type simply click the cross icon in the far right of the Activity type. This will move the Activity from the “Displayed Activities” section to “Hidden Activities”. Once an Activity is hidden it is no longer editable.

To re-add a previously removed Activity simply click on the plus icon in the far right of the relevant Activity, this will remove the relevant Activity from “Hidden Activities” and return it to the “Displayed Activities” section. The Activity will again become editable.

Renaming

When an Activity type is displayed in ePlanner the Activity’s name will be its Microsoft Dynamic CRM label attribute. If the label is not pertinent to the Activity type then it can be renamed.

To rename an Activity type click in the “Label” field to the right of the Activity “Name”. Once the administrator has renamed the Activity it will be automatically updated and used across ePlanner.

Recolouring

A default colour has been selected for each of the systems Activities, this colour will be used to represent that Activity type each time it is displayed across ePlanner. The default colour can be changed to a more relevant colour (to better represent its use within the current Microsoft Dynamic CRM instillation). EPlanner also allows the user to change the Activity colour in their personal preferences, this can allow for a single user to apply a more suitable colour relating to how the Activity is used by them.

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 "New window" option is selected then each time the relevant Activity is opened in an ePlanner view it will open in a new browser window.

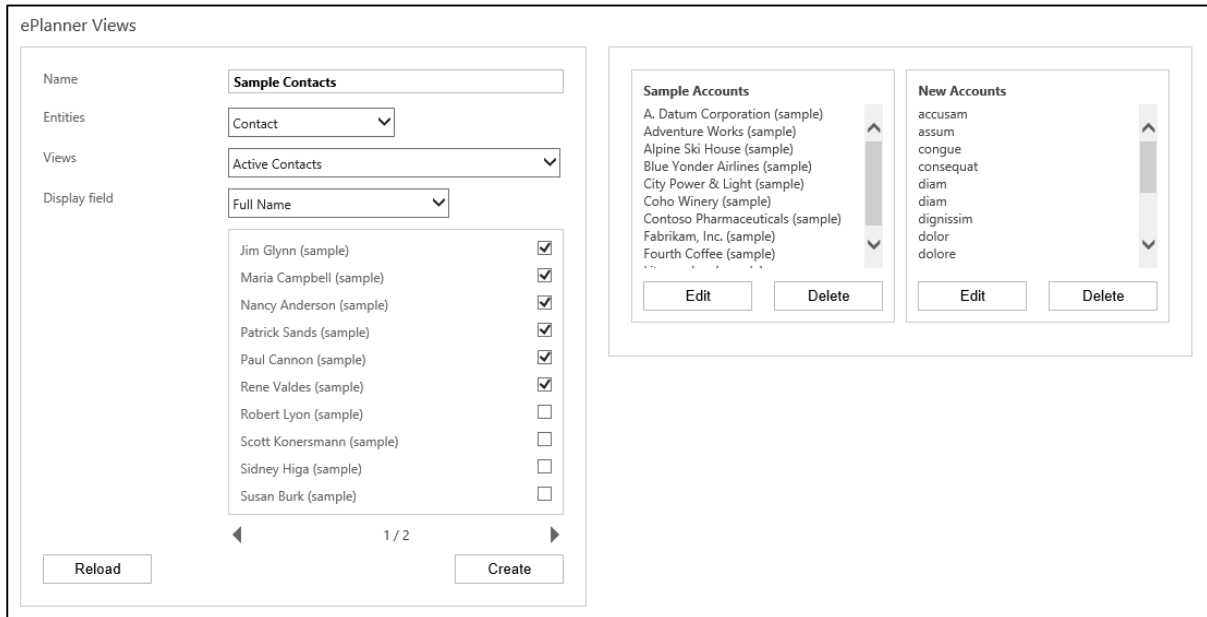
Reload

The list of buffered Activities can be reloaded from the Microsoft Dynamic CRM environment by pressing the "Reload" button, however this will remove all previous Activity configurations, such as Hidden Activities and Activity colours, therefore a warning dialogue will be displayed before any actions is carried out. In order to abort the reloading of the data simply press the "Cancel" button. To progress press "OK".



EPlanner Views

By default the ePlanner shows the Activities of the System users. In order to view Activates held against other Entities the Entities will need to be loaded into an ePlanner View.



Create

The first required field is the ePlanner View Name, this will be used to identify the ePlanner View and should reflect the contained Entities.

The remaining fields relate to the selected Entities that you wish to include in the ePlanner View (each selection has increased specificity). Firstly select the Entity type, next select a CRM View that contains the Entities to be included in this ePlanner View. The final selection option relates to the Entity field that should be used to identify the individual Entity (in most instances that Entities name field should be used).

Once the details have been set the available Entities will be displayed in pages, which can be navigated using the arrow buttons. To select an Entity simply check the box next to the displayed field.

To make sure the ePlanner view does not become overpopulated only fifty Entities may be added to an ePlanner View.

To create the ePlanner view simply press the “Create” button.

Edit

Once an Entity has been added to an ePlanner View it is protected from changes that are made to the parent record. This means that if the referenced Entity is deleted or renamed it will still appear on the ePlanner View with the same details as when the ePlanner View was created. This is done to enable the ePlanner users to access the Entities’ Activities until such a time as it becomes unnecessary for that Entity to be associated with the ePlanner View.

To update the Entities that have been added to the ePlanner View simply press the “Edit” button below the ePlanner View. When an ePlanner View is edited it will first synchronise the current

Entities with the CRM View that it was originally populated from. Once all of the Entities are up-to-date the administrator will be able to remove any of the currently selected Entities and add any new Entities (that meet the criteria of the CRM View that the ePlanner View was originally created from).

Delete

If an ePlanner View is no longer necessary it can be deleted and will no longer appear to any ePlanner user.

Reload

The list of buffered Entities can be refreshed by press the “Reload” button. This will have no impact on the previously created ePlanner Views, however as reloading the data takes some time a warning dialogue will be displayed before any actions is carried out. In order to abort the reloading of the data simply press the “Cancel” button. To progress press “OK”.

Participation types

A User is connected to an Activity through a Participation. When a user hovers the mouse cursor over an Activity the Activity’s details will be displayed, this includes all of the returned participants.

As with Activities some of the Participation types may not be relevant or may not be required to be displayed, for instance the Owner and Organiser of an Appointment are commonly the users who created the Activity and they are not necessarily the users who should be seen as having a connection to that Activity, therefore by deselecting a Participation type the user’s Participation with any Activity will be omitted from the Activities description.

CRM Users

By default when using the EPlanner calendar each user will have the ability to load the Activities of all of the users of Microsoft Dynamic CRM. If you wish to omit a user from ePlanner the relevant account should be un-ticked in this section.

Reload

In order to refresh the list of the CRM Users simply press the “Reload button”. In order to abort the reloading of the data simply press the “Cancel” button. To progress press “OK”.

