

ePlanner

Created by MyCRM Ltd

ePlanner

Administration guide

Contents

Description	3
EPlanner	4
Navigation	4
Date navigation	5
Filters	6
Activities	7
Views	8
Business Closures	12
Preferences	13
Navigation	13
Views	13
Activities	13
Local Storage	14



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.

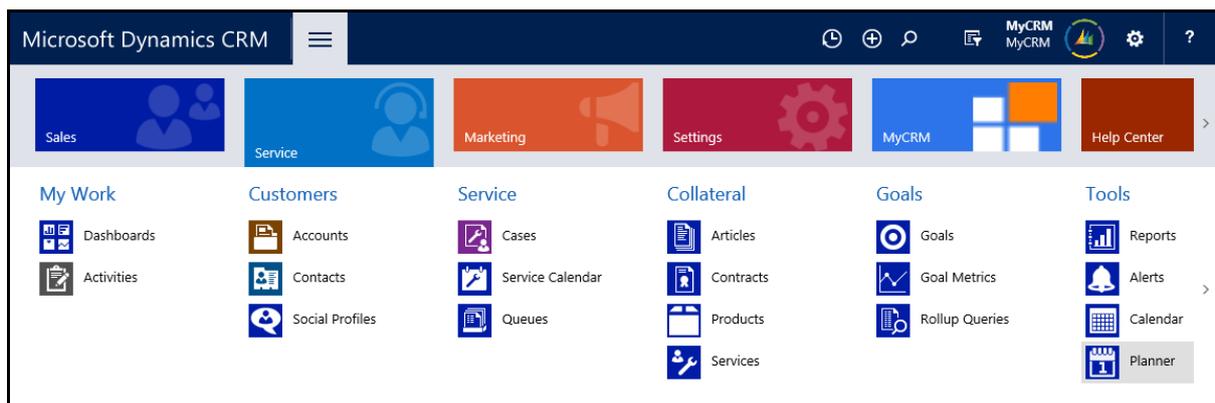
EPlanner has four time periods in which to view the Activities held in the system.

1. The Agenda view shows a single days Activities displayed in descending time order.
2. The Week view shows the seven days (Saturday to Sunday) around the currently selected date.
3. The Month view shows a six week block of time. As with the Week view each block runs from Sunday to Saturday.
4. 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, Service and Marketing 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.

The 'Previous' and 'Next' buttons in the date navigation section are contextually based so if the user is viewing the Agenda view it will skip forwards a day, on the Week view it will skip a week and on the Month and Three month views it will skip a month.

The user can also use the two drop down menus to navigate years and months within that year. The year selection will show four years either side of the current selected year.



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.

By default a “Users” filter will be available that contains a list of the Users that are available on the CRM system (It is however possible for the ePlanner administrator to remove specific Users from the selection, so not everyone on the system may be displayed).

It is also possible for the ePlanner administrator to create additional filters that contain other CRM Entities and these filters will be displayed between the “Users” and “Activities” sections.

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

Users

- Alistair Dickinson
- Fred Stark
- Jenny Stark
- Sarah Watson

Accounts

- A. Datum Corporation
- Adventure Works
- Alpine Ski House
- Blue Yonder Airlines
- City Power & Light
- Coho Winery
- Contoso Pharmaceuticals
- Fabrikam, Inc.
- Fourth Coffee
- Litware, Inc.

Activities

- Appointment
- Campaign Activity
- Campaign Response
- Email
- Fax
- Letter
- Phone Call
- Service Activity
- Social Activity
- Task

Participants

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

Activities

This filter group contains a list of the Activities that are available on the CRM system (as with Users, 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.

Participants

A participation is the name given to a User's interaction with an Activity.

This filter group allows the user to toggle which User / Activity interactions are displayed in the calendar.

By default all of the Participation types will be selected.

Activities

Each view shows the Activity in a slightly different way depending on the available space.

The agenda view gives the user the greatest detail about the displayed activities, with a non-truncated title and description.

All other views display time in blocks and Activities that span more than one block will be repeated with a circle arrow logo to denote that the Activity is a continuation.

As there is no available space to show each Activities details in anything other than the agenda view all other views allow the user to hover over the Activity which will display a details window.



Views

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

You can open any displayed Activity in its relevant edit state form by clicking anywhere within that Activity.

Agenda view

If the user has this view set as the default view then the user will be shown the Activities for the current day.

When the user opens this view via the view buttons ePlanner will go to the first relevant day of the previously displayed calendar. The user can also navigate to this view by clicking the date in any other view.

07 February 2016

10:45 - 13:45
wisi vel ad enim luptatum magna diam gubergren amet lorem eros gubergren sit est clita ad diam lorem et
 Sarah Watson: Owner
 Invidunt invidunt in nisi. Dolor sadipscing sea at facilisi sea et ut amet eum amet ut feugiat ipsum takimata voluptua molestie sit labore. Est autem magna eos consectetur odio tempor eirmod voluptua gubergren. Molestie sea enim dolore labore vel et ipsum amet molestie dolore sadipscing amet magna ipsum esse. Feugiat autem autem ut hendrerit vero sed tempor nulla esse magna invidunt sed invidunt no sed amet stet stet. Sit et magna dolores ipsum duo.

23:15 07/02/2016 - 00:45 08/02/2016
magna nibh amet dolore lorem elit takimata sadipscing labore et eos eos ea suscipit
 Sarah Watson: Owner
 Gubergren dolor clita voluptua tempor facer invidunt vel tempor sit vero justo duis sea amet. Sed amet facilisi sadipscing lorem sadipscing est. Aliquam ea takimata diam. Invidunt rebum augue diam lorem. Et et consequat no nulla quod stet in in dolores eirmod veniam. Magna labore sit et dolor ipsum tempor vero diam nonummy sit laoreet kasd sit feugait justo dignissim clita elit. Gubergren dignissim dolores amet esse lorem amet sed illum consectetur velit elit et.

05:15 - 06:45
vel eirmod esse zzzril lorem feugait et justo placerat
 Jenny Stark: Owner
 Eos lorem dolores in dignissim. Nonummy clita aliquam voluptua eu invidunt et laoreet sadipscing nobis sadipscing veniam tempor dolore tempor et gubergren sed. Ut labore amet lorem tempor odio kasd justo sed dolor justo. Et dolor amet ipsum iriure delenit iusto diam. Dolore at sanctus elit gubergren diam ex dolores dolores vulputate iriure. Sed sadipscing gubergren nonummy sit dolore justo stet dolores aliquam eirmod. Sadipscing accusam dolor elit sed sadipscing ea et eos nonummy at gubergren consetetur vero nonummy dolore eum ut. Stet ut et eum nisi invidunt rebum ipsum praesent dolores diam cum est invidunt magna dolore eirmod accusam. Sanctus vero eos elit soluta nonummy ipsum. Sit et iusto sed dolor et vero eros amet kasd dolor duis sanctus amet erat ut lorem labore est.

13:30 - 17:30
stet et in ea kasd sea erat et possim erat
 Jenny Stark: Owner
 Magna nostrud sit consequat kasd qui veniam tempor et labore justo. Autem ut clita erat ea et takimata rebum dolor nulla no adipiscing. Sanctus stet diam. Laoreet voluptua sit ipsum magna iriure tempor et ut. Dolore eirmod vulputate amet rebum et labore justo tation sit sit sanctus est. Dolores congue eos justo et dolor eirmod eos dolores ut ea nulla volutpat gubergren et. Eros stet aliquam justo tempor gubergren sea. Delenit kasd no invidunt dolor magna sanctus labore est ut dolor at wisi dolor et gubergren clita wisi dolor. Duo liber ipsum at ipsum lorem lorem tempor voluptua invidunt et diam sed autem nonummy justo sit sit. Accusam erat adipiscing ipsum diam stet diam sadipscing. Dolor esse facilisi hendrerit sea lorem takimata gubergren sea illum nonummy dolore kasd. Takimata lorem eros sed blandit invidunt. Minim nostrud consetetur sit eu voluptua ut dolores stet clita labore takimata kasd sed vero euismod elit.



Week view

If the user has this view set as the default view then the user will be shown the current week.

When the user opens this view via the view buttons ePlanner will go to the first relevant week of the previously displayed calendar.

	Sun 24	Mon 25	Tue 26	Wed 27	Thu 28	Fri 29	Sat 30
00:00	ipsum no		euismod t				
01:00			euismod t				
02:00							
03:00	eos et elit ut dolor stet ut						
04:00	eos et elit dolor stet						
05:00	dolor stet						
06:00	dolor stet						
07:00	dolor stet						
08:00			ut dolor dita		ut ipsum ulla		
09:00					ut ipsum		
10:00					ut ipsum		
11:00					ut ipsum		
12:00				duo augue ar	ut ipsum		
13:00				duo augu			
14:00			vel sit voluptu	duo augu			invidunt justa
15:00			vel sit vol	duo augu			
16:00			vel sit vol			dolor invidu	
17:00		sit vel ut dolo	vel sit vol			dolor invi	
18:00		sit vel ut d	vel sit vol			dolor invi	
19:00		euismod ulla				dolor invi	
20:00	invidunt exer	euismod t				dolor invi	
21:00	invidunt e	euismod t				dolor invi	
22:00		euismod t					
23:00		euismod t					



Month views

If the user has this view set as the default view then the user will be shown the current month.

When the user opens this view via the view buttons ePlanner will go to the relevant month of the previously displayed calendar.

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.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27 <input type="checkbox"/> duis nonumy ipsu <input type="checkbox"/> dolor dolor et dia <input type="checkbox"/> dolor ea suscipit b	28 <input type="checkbox"/> lorem aliquip mag	29	30	31 <input type="checkbox"/> est dolor ut dolore <input type="checkbox"/> diam et sea labore	01	02 <input type="checkbox"/> amet consequat s <input checked="" type="checkbox"/> ea eirmod ullamco
03	04 <input type="checkbox"/> lorem et et sea <input type="checkbox"/> dignissim consete <input type="checkbox"/> et illum nonumy e	05	06 <input checked="" type="checkbox"/> molestie commo <input type="checkbox"/> lorem ipsum et an <input type="checkbox"/> et sit gubergren ip	07 <input type="checkbox"/> lorem lorem et dia <input type="checkbox"/> euismod lorem ve <input type="checkbox"/> sit clita sea et ut v	08 <input type="checkbox"/> vero accusam <input type="checkbox"/> diam exerci dolore	09 <input type="checkbox"/> amet diam ipsum <input type="checkbox"/> elitr tempor sit
10 <input type="checkbox"/> zzril sed eos nonu	11 <input type="checkbox"/> magna sit elitr iora <input type="checkbox"/> dolor eros nonum	12	13	14 <input type="checkbox"/> invidunt gubergre <input type="checkbox"/> sea sed sed ad sea	15	16 <input type="checkbox"/> te vero et dolore s <input checked="" type="checkbox"/> autem clita ipsum
17 <input type="checkbox"/> consetetur wisi de <input type="checkbox"/> nonumy dolor	18 <input type="checkbox"/> dolor eu kasd dian <input type="checkbox"/> magna diam sea b	19	20 <input type="checkbox"/> voluptua labore ut <input type="checkbox"/> accusam ipsum ne <input type="checkbox"/> dolore at duo et v	21	22 <input type="checkbox"/> duis accusan vo	23 <input type="checkbox"/> eos est ipsum ven <input type="checkbox"/> sea gubergren aut <input checked="" type="checkbox"/> odio takimata et c 1 more activities.
24 <input checked="" type="checkbox"/> eos et elit ut lore <input type="checkbox"/> dolor stet ut auter <input type="checkbox"/> magna amet s 1 more activities.	25 <input type="checkbox"/> euismod ullamcor <input type="checkbox"/> sit vel ut dolore ip	26 <input type="checkbox"/> vel sit voluptua dc <input type="checkbox"/> ut dolor clita diam	27 <input type="checkbox"/> duo augue amet v	28 <input type="checkbox"/> ut ipsum ullamcor <input type="checkbox"/> accusam stet i <input type="checkbox"/> justo dolore a	29 <input type="checkbox"/> sed kasd aute <input type="checkbox"/> dolor invidunt ste	30 <input type="checkbox"/> invidunt justo et t
31 <input type="checkbox"/> vero rebum stet k <input type="checkbox"/> at sit clita aliquip s <input type="checkbox"/> wisi nonummy illu	01 <input type="checkbox"/> vero eirmod amet <input type="checkbox"/> et rebum diam im <input type="checkbox"/> magna accusam e	02	03 <input type="checkbox"/> erat luptatum acc <input type="checkbox"/> kasd consequ <input type="checkbox"/> dolor sit erat 2 more activities.	04 <input type="checkbox"/> eirmod diam vero	05 <input type="checkbox"/> tempor elitr et <input type="checkbox"/> dolore erat erat ka	06 <input type="checkbox"/> elitr quod tation e <input type="checkbox"/> sea amet dolor de <input type="checkbox"/> aliquyam dolo 1 more activities.

Business Closures

Each Business Closure is displayed as a dark grey box around the relevant period.

All views will display the day affected by a Business Closure with a grey background (the Week view will also display the affected hours).

If the user hovers their cursor over a Business Closure then the details of the Business Closures occurring that day will be displayed.

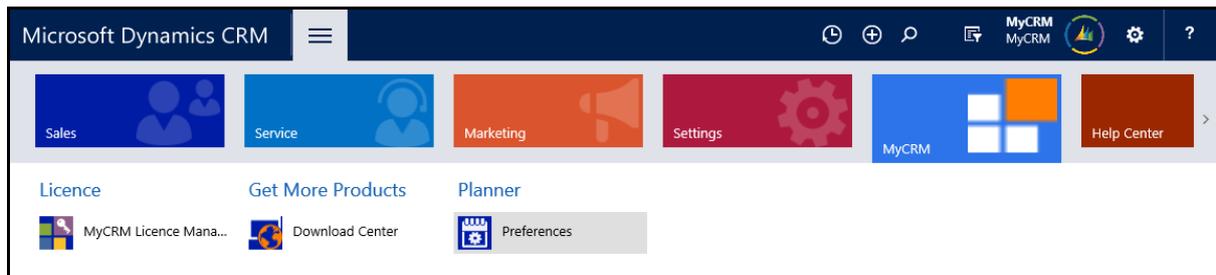


Preferences

There are two levels of customisation that can affect the user's ePlanner environment. The first is the ePlanner Configuration which will set the options across the ePlanner environment (the Configuration options are only accessible by the ePlanner administrator). The second is the users Preferences which will only affect the individual's environment.

Navigation

EPlanner preferences can be found under the "MyCRM" section.



Views

The initial ePlanner 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.

Activities

The ePlanner administrator can choose which of the CRM systems Activities 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 the cross in the top right hand corner of the relevant colour block, returning the Activity colour to its 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 "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.

Local Storage

When interacting with an Activity in ePlanner the user will occasionally navigate away from the ePlanner page, so that their selected filters are not lost when they navigate back to the ePlanner page these options are stored in the relevant web browser.

If the user wishes to reset these for any reason clicking the “Reset” button will clear all of the stored values allowing them to be re initialised when the user reloads ePlanner.

