

ePlanner

Created by MyCRM Ltd

ePlanner

Administration 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.

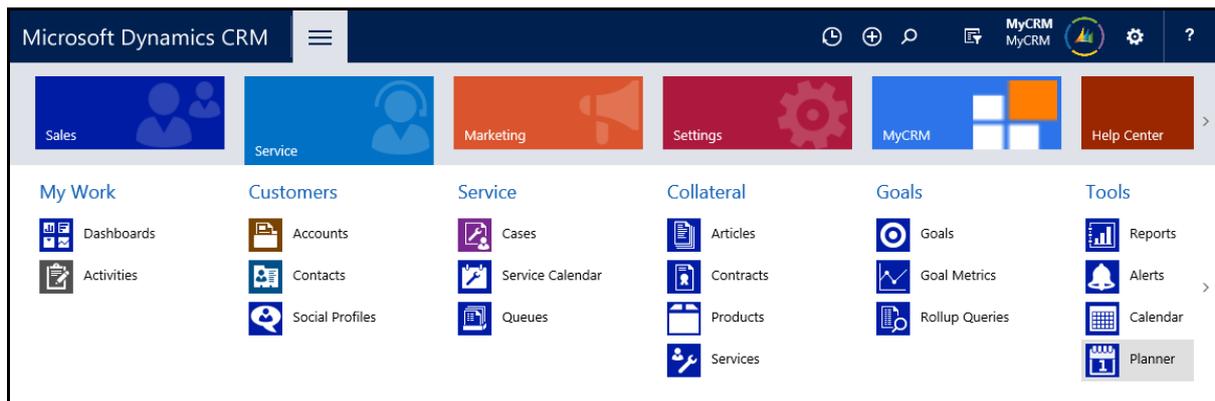
EPlanner has four time periods in which to view the Activities held in the system.

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.

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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.

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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.

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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.

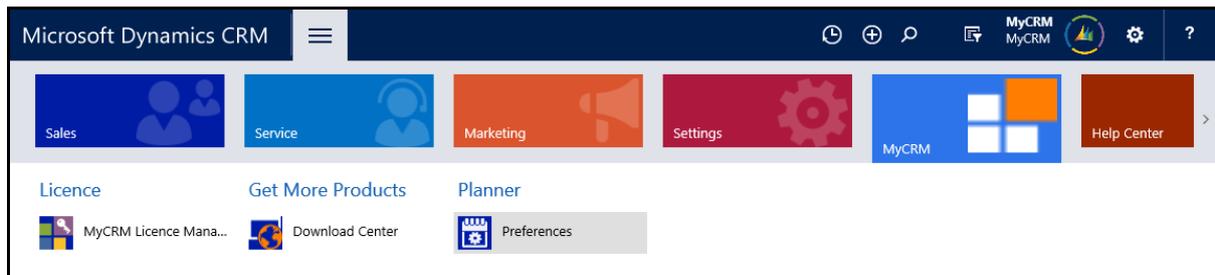


Preferences

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.

