



Welcome to MyCRM *Making CRM work for business*

FACTSHEET

Product Name	MyCRM eUser
Version	2011
Owner	MyCRM

Available For	
MyCRM Hosted	✓
Microsoft CRM Online	✓
CRM On-Premise	✓



For Additional Information

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eUser for Microsoft CRM 2011

Better system user management for CRM 2011

The all new eUser solution from MyCRM empowers system administrators to manage user accounts and personal settings and outlook synchronisation correctly, and gives additional flexibility without having to gain remote access to individual user systems.

There are a number of key areas that the new eUser solution addresses

Key Areas of New Functionality:-

1. Update users in bulk
2. Extra settings available to administrators (currently in personal options)
3. Set activity defaults
4. Set Calendar defaults
5. Set Currency for User
6. Set User access modes.
7. Use advanced find to bulk update sections of users.
8. Extends user record in CRM for easy updating.
9. Bulk set Outlook filters to Null to yield now data to synchronise
10. Set individual user Outlook filters to Active or Inactive

The eUser solution increases the productivity of a system administrator by making it easy not only to set the standard user settings but all the settings of personal options on bulk.

Without the great features of eUser an administrator will have to login to every single account to make the settings individually.



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Settings—General user Settings

In the eUser interface there are a number of tabs, in this section we look at the general tab.

The General tab includes features that enable an administrator to bulk or single select a record

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- A users default pane (workspace, sales settings etc.)
- A users default tab
- Number of records per page
- Advanced find mode
- Time Zone
- Currency

The above screen is also available directly on the user record to enable quick access to individual user settings.

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Settings—Activities user Settings

The Activities tab includes features that enables an administrator to bulk or single select

- A users default calendar
- A users default work hours (Start and End)

The above screen is also available directly on the user record to enable quick access to individual user settings.

Settings—Formats, Emails and Privacy user Settings

The next tab is for email, formats and privacy settings Which includes a number of settings that can be managed by an administrator.

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Settings—Formats, Emails and Privacy user Settings

On this tab an administrator can set the following features

- Allow user to send email on behalf of user
- Set the type of tracking for one or more users
- Bulk set what type of records are created from an email
- Set error report message for one or more users.

Settings— Email and Client Access user Settings

On this tab you have addition email and access settings

The screenshot shows the 'Settings' page with tabs for General, Activities, Formats, E-mail and Privacy, E-mail and Client Access, and Outlook Synchronisation. The 'E-mail and Client Access' tab is active. It contains the following sections:

- E-mail Access Configuration:** Includes dropdowns for 'E-mail access type - Incoming' and 'E-mail access type - Outgoing'.
- Client Access License (CAL) Information:** Includes dropdowns for 'Access Mode' and 'Licence Type'.
- User State:** Includes a dropdown for 'Is Disabled'.

- Email Access type Incoming
- Email Access type Outgoing
- Client Access Mode
- Licence Type
- Deactivate or activate on bulk

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Settings—Bulk Outlook Filter settings

On this tab an administrator can set the default filters in bulk for selected users.

By Default the following synchronisation filters exist

- Appointment
- Fax
- Letter
- Contact
- Phone Call
- Recurring Appointment
- Service Activity
- Task

This feature can be used to render these filters by default to return no data, it is not possible to disable or make these filter inactive so we change the search criteria to be null.

Settings

General | Activities | Formats, E-mail and Privacy | E-mail and Client Access | Outlook Synchronisation

Modify the default filters that specify the type of information that is to be synchronised with Microsoft Outlook

Please note:
 Altering these settings is technically a customisation and will only affect users that create a subscription via Outlook after the settings have changed.
 Users that have already created a subscription will not be affected by these changes.
 You can edit existing users' synchronisation filters using eUser when editing their user record.

Name	Returned Type	Description
<input type="checkbox"/> My Appointments	Appointment	Appointments Synced To Outlook
<input type="checkbox"/> My Faxes	Fax	Faxes Synced To Outlook
<input type="checkbox"/> My Letters	Letter	Letters Synced To Outlook
<input type="checkbox"/> My Outlook Contacts	Contact	Contacts Syncing To Outlook
<input type="checkbox"/> My Phone calls	Phone Call	Phone calls Synced To Outlook
<input type="checkbox"/> My Recurring Appointments	Recurring Appointment	Recurring Appointments Synced To Outlook
<input type="checkbox"/> My Service Activities	Service Activity	Service Activities Synced To Outlook
<input type="checkbox"/> My Tasks	Task	Tasks Synced To Outlook

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Settings—Per User

The same settings are available on the individual user records, note if a user has not installed the Outlook connector the administrator will see the following on the user record

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Set Personal Options
Change the default display settings to personalize Microsoft Dynamics CRM for this user.

General | **Activities** | Formats, E-mail and Privacy

Select home page and settings for Get Started panes

Default Pane: Area_Workplace | Default Tab: nav_dashboards

Show Get Started panes on all lists

Set the number of records shown per page in any list of records

Records Per Page: 50

Select the default mode in Advanced Find

Advanced Find Mode: Simple

Set the time zone the user is in

Time Zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

Select a Default Currency

Currency: [Dropdown]

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Settings—Per User

If an end user has had the outlook connector installed and connected to the CRM the following extra setting are available

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Set Personal Options
Change the default display settings to personalize Microsoft Dynamics CRM for this user.

General | **Activities** | Formats, E-mail and Privacy | Outlook Synchronisation

Select home page and settings for Get Started panes

Default Pane: Default Tab:

Show Get Started panes on all lists

Select the number of records shown per page in any list of records

Records Per Page:

Select the default mode in Advanced Find

Advanced Find Mode:

Select the time zone the user is in

Time Zone:

Select a Default Currency

Currency:

Which means the administrator can manage the individual filters for Outlook Synchronisation for that user.

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Additional Information

eUser is a MyCRM download solution and extends Microsoft CRM 2011, this solution is designed to increase productivity for system administrators.

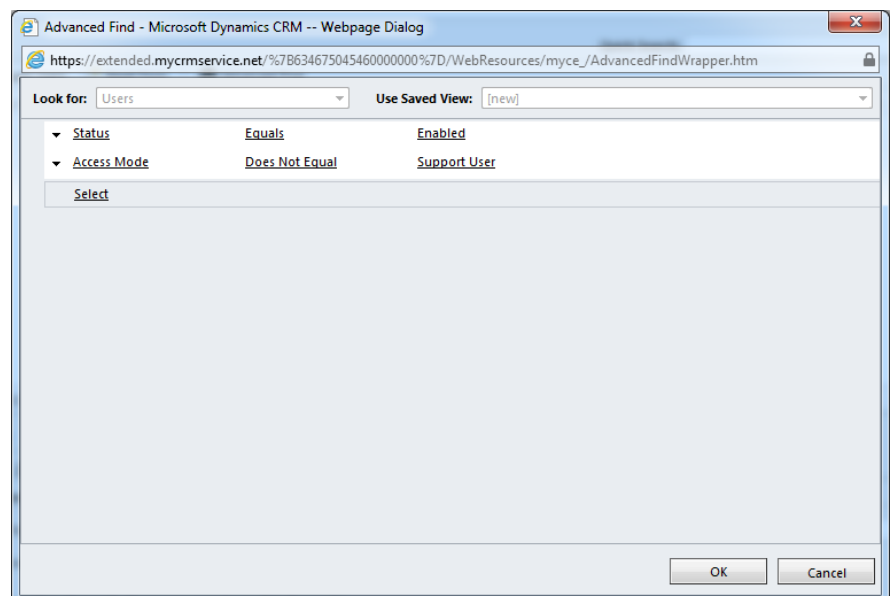
We have incorporated the standard advanced find feature to select users that need administration.

This tool does not restrict the end user changing personal options but for larger systems, organisation prefer to manage how an end user will work with the solution from day one.

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Use Advanced Find



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You can use the advanced find feature in CRM 2011 to select the users you need to administrate.



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To find out more about eUser and download a full trial please contact MyCRM below

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For more information please contact our sales team on :

+44 (0) 1983 245245

or email

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