Welcome to MyCRM *Making CRM work for business*

eUser for Microsoft CRM 2011

FACTSHEET

Product Name	MyCRM eUser
Version	2011
Owner	MyCRM

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

MyCRM extended

For Additional Information

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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

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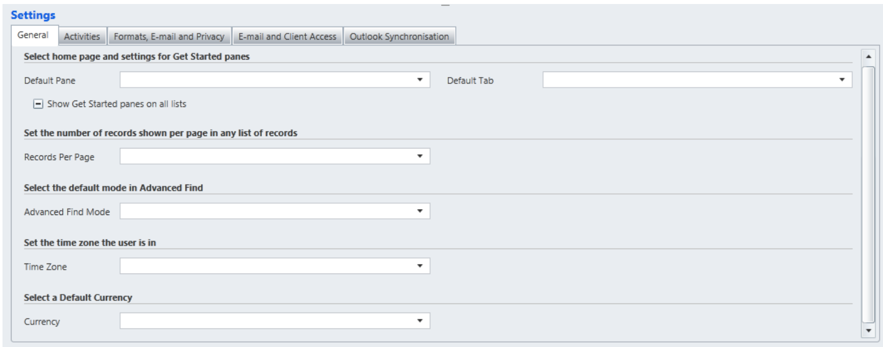
In the eUser interface there are a number of tabs, in this section we look at the general tab.

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



- 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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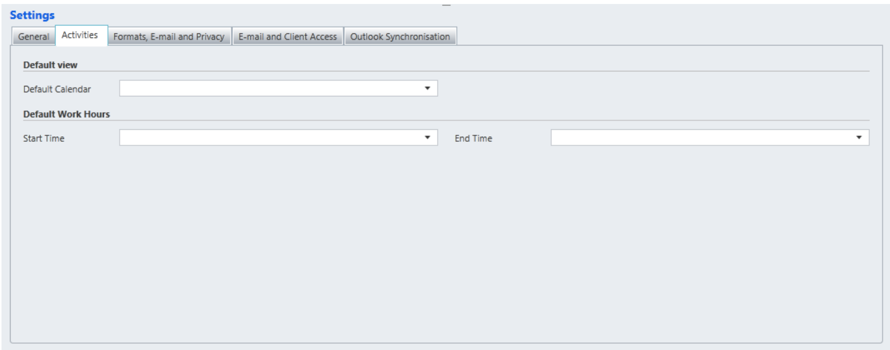
Settings—Activities user Settings

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

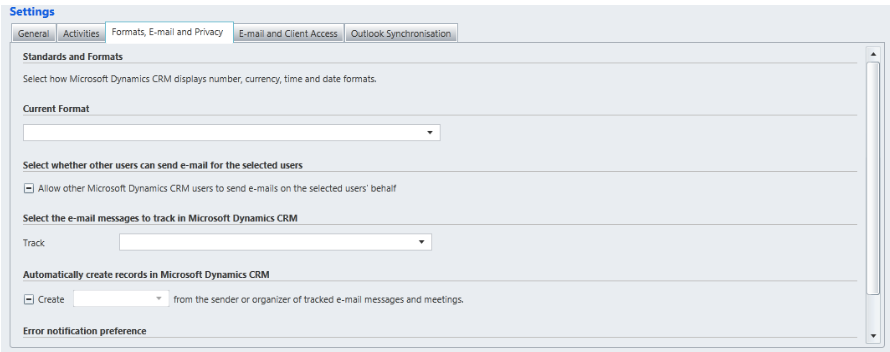


- A users default calendar
- A users default work hours (Start and End)

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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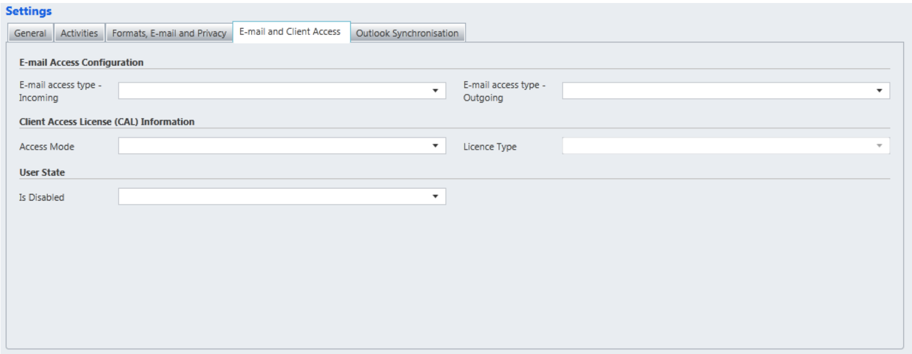
Settings—Formats, Emails and Privacy user Settings

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



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

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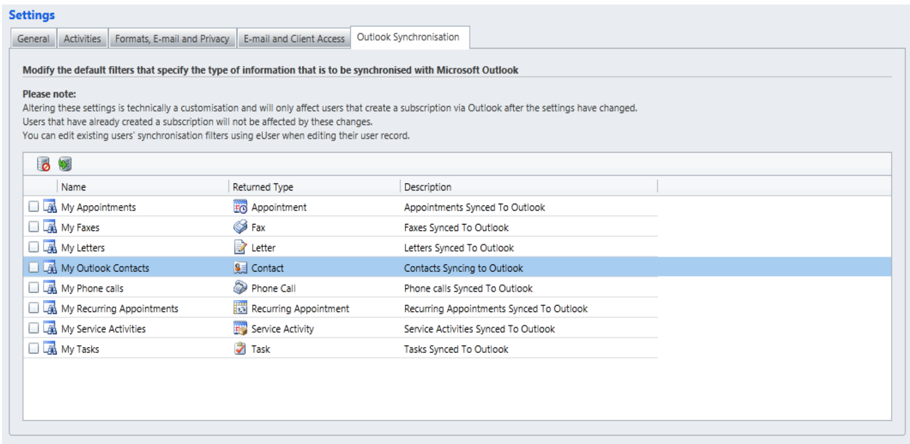
Settings—Bulk Outlook Filter settings

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.



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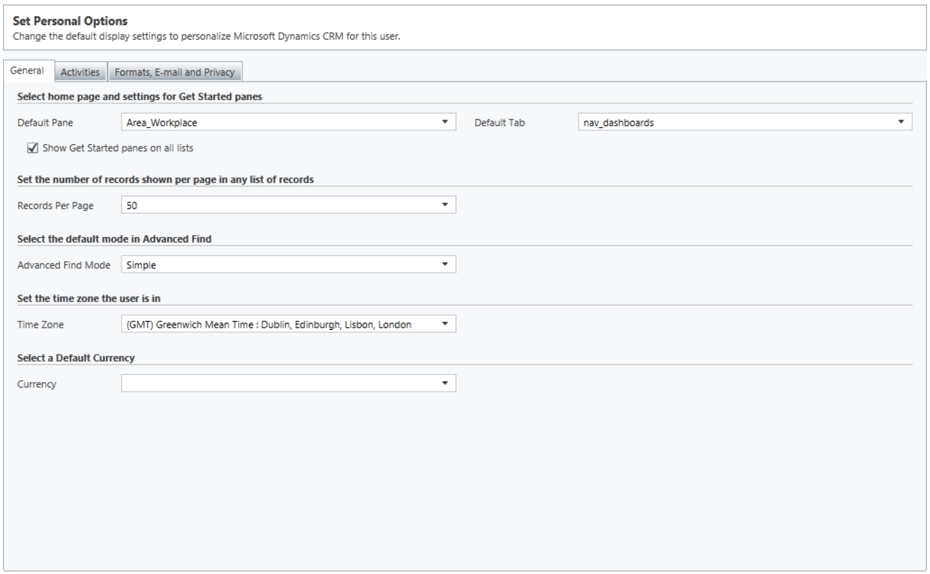
Settings—Per User

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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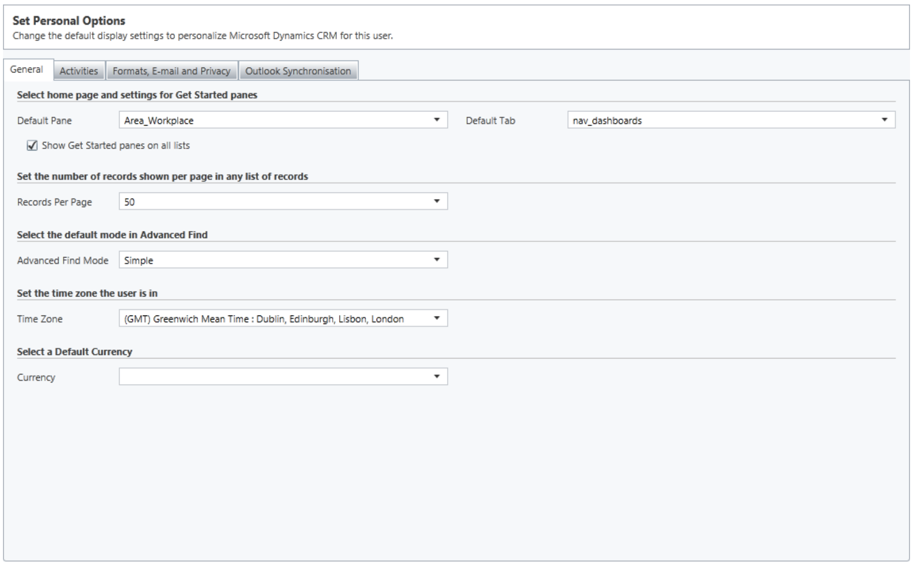
Settings—Per User

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



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

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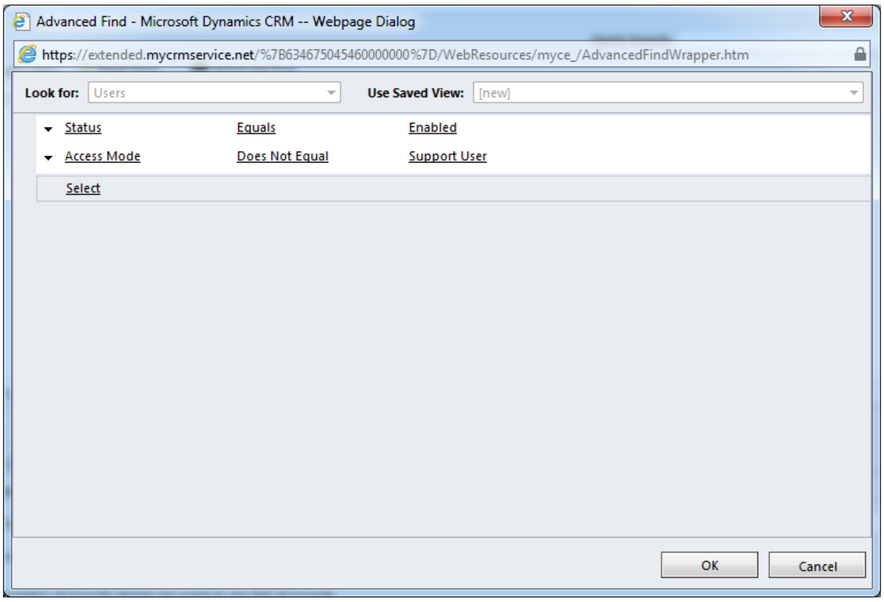
Additional Information

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.

Use Advanced Find



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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