

RELEASE NOTE - Draft

iDcrm 1.2.7 GOLD build 20100709

New functionalities & Changes

- ▶ iDcrm is now more in line with the graphical interface of Microsoft CRM

All the menus, lists and records have been rewrite in order to align with the “Blue” interface of Microsoft CRM. The icons of the entities are also the one of MS CRM. Finally some of the entities that are standard for MS CRM and “Custom entities” for iDcrm, have now their own icons when they are inserted in iDcrm.

- ▶ The “edit home screen” function:

Now you can re-organize your home screen the way you want it. You can:

- edit / rename the standard entities block
- add / edit / rename new blocks
- add / edit / rename new entities
- add / edit / rename web links in order to display web pages directly in iDcrm (like reports etc)

- ▶ Ergonomic improvements:

- the related entity icon is displayed in the Activity list
- the activity form has been rewritten in order to display at the same time the mandatory information (like regarding, start date etc) and also all the fields of the MS form (like category etc) in order to have a quick view of the content of the activity.
- now you can open the related record of an activity (like an account) and come back directly to the activity record. It works the same for any related record to any other record.
- pop-up windows for the form of records to extend the number of fields displayed at the same time.
- the edit form of the activities is now in line with the standard form of the other entities.
- Validation modality: now every changes must be validated.

▶ Services activities:

Now you can display, add, edit Service activities like any other kind of activities. Caution: the automatic selection of Resources or sites based on structured services is not effective.

▶ List filtering:

In order to display the relevant information in any list (except Opportunities and Activities) we've added a new option that permit to:

- add any required filters on the list (like displaying only the customers in account). The default one is "Status = Active".
- change the grouping field. The default one is "Name". This field is also the field used in the quick search area.
- change the list fields. There are 4 available positions.

We plan to add views in the future, but the issue with the views is that it can require entities not available and also display so much fields that they cannot be displayed correctly in the list.

▶ Notes:

Now you can add / edit notes on any entity where notes are available the same way as in MS CRM.

▶ Silent Sync:

Now silent sync is triggered on creation in iDcrm but also on any changes / update

▶ Phone call logging:

Now, when you click on any "Phone call - out" icon in any record, iDcrm creates automatically a Phone call -out record related to the current record and let you place the call. When you relaunch iDcrm after the call, iDcrm will open on the Activity in order to let you write notes or edit the activity and then save it.

▶ Automatic dialing:

From any Phone Activity (if the phone number is available) you can click on the phone number in order to call it.

▶ Website display:

Now Safari is encapsulated in iDcrm so you don't have to leave iDcrm to display any Website.

Resolved Bugs

- ▶ Cases are now correctly synchronized.
- ▶ Sometimes, Opportunities and/or activities were not displayed in iDcrm.