

CALENDAR PERSONALIZATION

This feature was developed to allow users to see the events in calendar as per their personalized queries in visit appointment and phone owl

This was mainly developed for users to see their involvement in events, using my involvement field.

Steps :

Go to appointment, visit, phone owl

Go to my visits, my phone calls, my appointments (queries created from these are only seen for personalization)

Add extra filters and save query.

Go to calendar -> start Personalization

You shall see the created queries in drop down -> upon selecting a query -> the events should be displayed as per selected query.

Known Issue.

Refresh is needed for queries to appear in drop down of calendar upon personalization

2006

Many customer users started using this feature with multiple fields from advanced search.

We have now re-vamped this to accommodate limitations like date fields and substitutes.

Limitation:

- Date field like "current month" "current year", "yesterday" etc are not supported.

-complex Conditions not allowed

-If new parameter is added to existing query, it won't be considered - create a fresh default set

2005

Below is the list of fields that can be used in personalized query to be used in calendar

Appointment :My appointments ->

- My involvement
- Subject
- ID
- Document type
- Category
- Status
- Priority
- Location
- Owner
- Account
- Contact
- Organizer
- State
- Country
- Postal Code

Visit :My visits->

- Party Role
- Subject
- ID
- Status
- Owner
- Account
- Organizer
- State
- Country
- Postal Code
- Perfect store visit
- Visit Type

Limitations

Phone Call :My Phone Call ->

- My involvement
- Subject
- ID
- Document type
- Category
- Status
- Priority
- Location
- Owner
- Account
- Organizer
- State
- Country
- Postal Code

- Date Fields in Personalized default set not supported for calendar use case
- If user has a substitute - the results shown in OWL and calendar would not match
- No complex conditions allowed