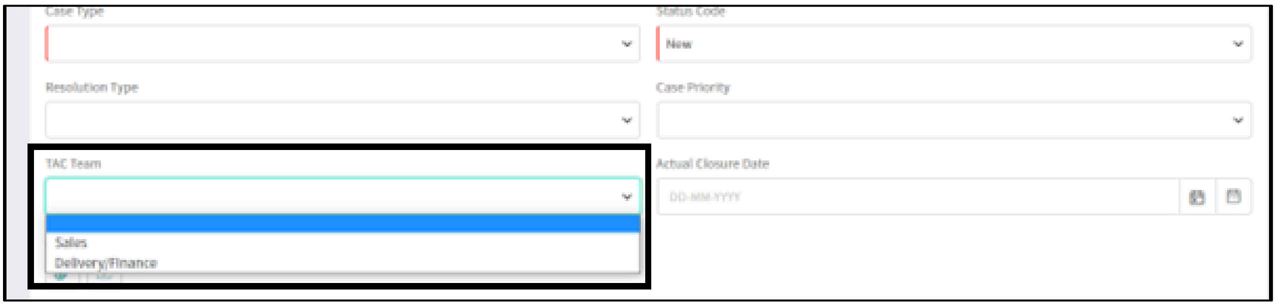
CRMNEXT

My Portal Request (MPR) Summary

(Published on 17th June'22)

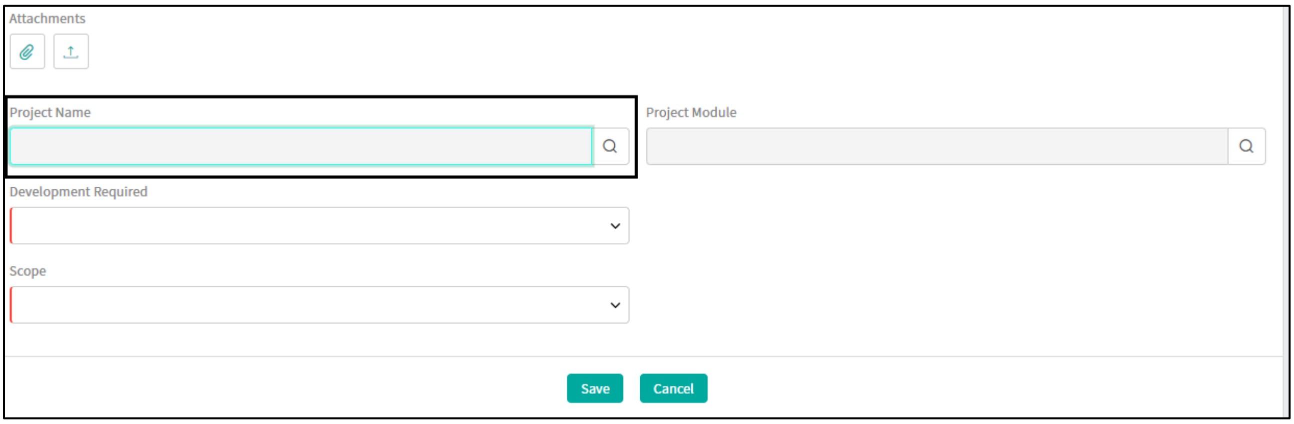
The sole purpose of this document is to get a better understanding on the newly implemented fields, on MPR Layout and their expectation w.r.t showcasing weekly progress on the ongoing and and planned projects along with individual capacity/efforts plan on these projects

1. **TAC Team**: A picker field, created in order to streamline the flow of CR Cases in our internal teams.



- The value can be selected as per the defined criteria for TAC Team Cases i.e., if the case is being handled by Sales Team, then select 'Sales' as value, and it would automatically get assigned to the Sales team owner. Similarly, if it is being handled by someone from Delivery Team, then select 'Delivery' as value, and it would eventually get assigned to the respective owner of that team.

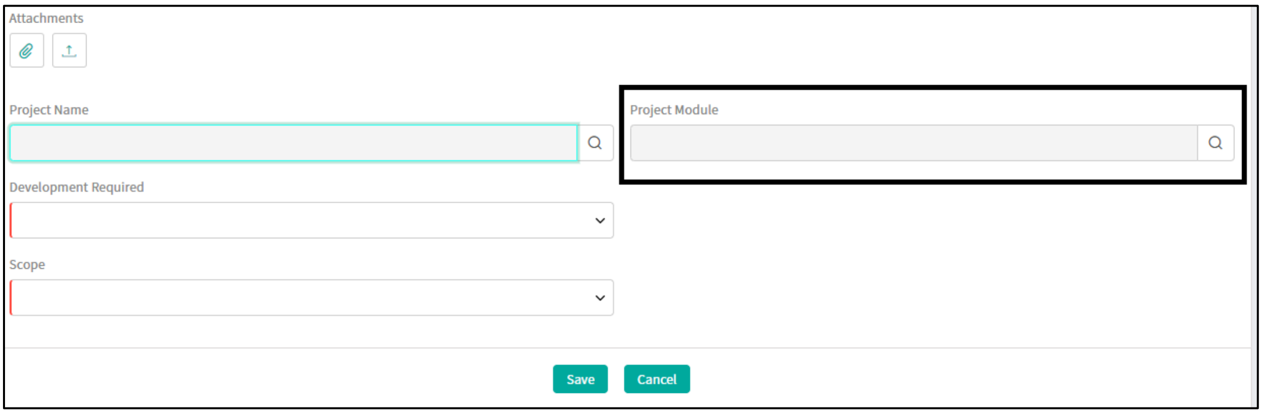
2. **Project Name**: This field is created in order to map the cases to their respective projects.



Mostly the cases should be mapped to only 2 Projects:

1. Incident MPRs Q1 FY23: The project changes every quarter, so for Q2, it would be 'Incident MPRs Q2 FY23' and further for Q3, Q4, accordingly.
2. CR MPRs Q1 FY23: This project also changes every quarter, so for Q2, it would be 'CR MPRs Q2 FY23' and further for Q3, Q4, accordingly.

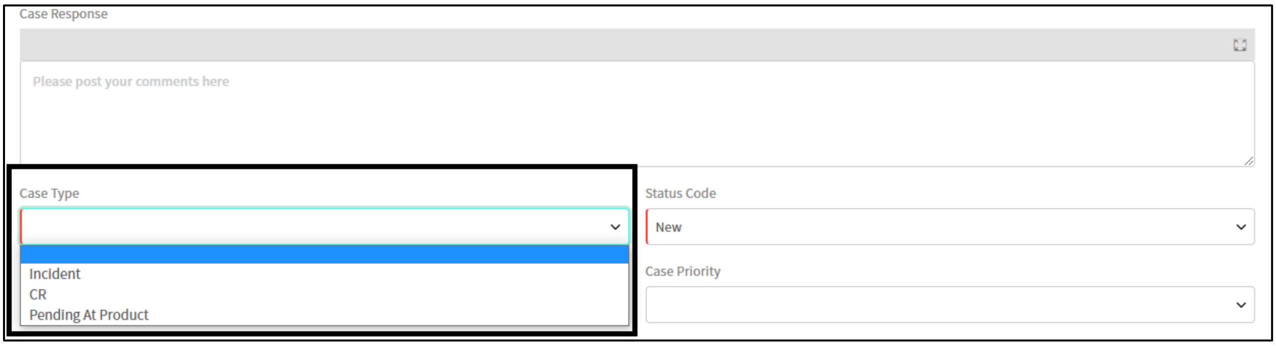
3. **Project Module**: Similar to ‘Project Name’ field, this is also a multi-picker, that shows the data of a Sub-Task, inside a particular project. Unlike Projects, ‘Project Modules’ are changed every month, instead of every quarter.



Mostly the cases should be mapped to only 2 Projects:

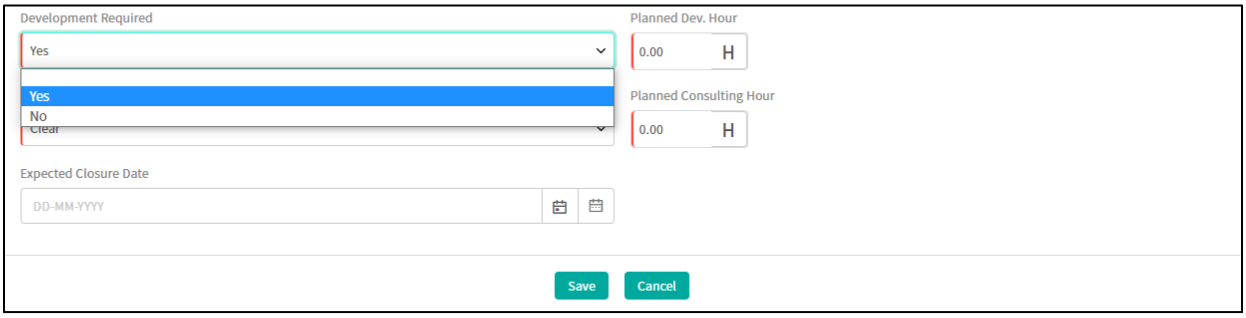
1. MPR June FY23: This module should be selected if the project being mapped is ‘Incident MPRs Q1 FY23’.
2. June 22: This module should be selected if the project being mapped is ‘CR MPRs Q1 FY23’.

**Note: Although, in order to map the cases with their Projects and Modules, value needs to be selected by searching manually from the multi-picker. But to reduce this effort, you’re just required to define the Case Type (CR/Incident) and the respective projects will be mapped automatically, post saving the record. For a better understanding on the same, refer the image below.*

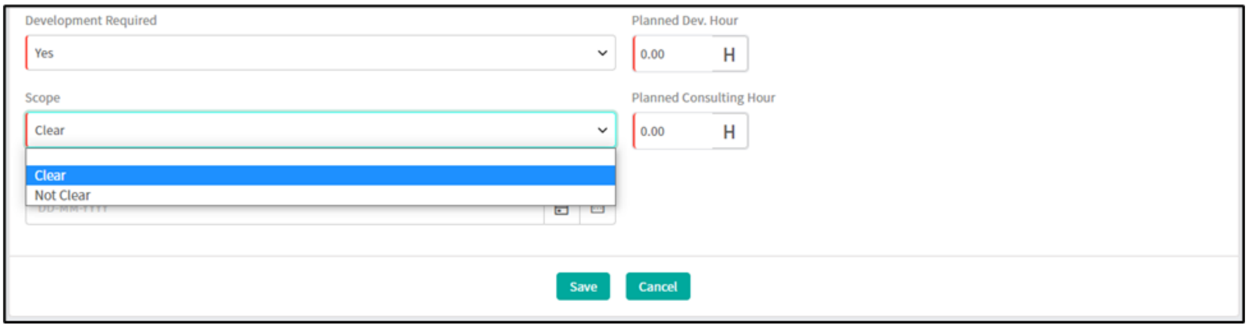


4. **Development Required & Planned Dev. Hour**: If in any case, be it Incident or CR, any changes from development team are required, the value should be selected as ‘Yes’ and if any assistance is not required form the team, one can just select ‘No’.

Post selecting ‘Yes’, as a value, another field namely ‘Planned Dev. Hour’ populates, which is required in order to define the expected time required from development team. For a better understanding on the same, refer the image below.



5. **Scope & Planned Consulting Hour**: 'Scope' field is created in order to bifurcate/define the MPRs based upon the clarity of requirement mentioned. If the requirement mentioned by the case owner (stake holder) is entirely understandable, the value should be selected as 'Clear' and if it is incomprehensible, the value should be selected as 'Not Clear' which states that the case would either be considered as 'Invalid' or in 'Awaiting Input', until the owner provides a proper document in order to give more clarity on the requirement.
   Post selecting 'Clear', as a value, another field namely 'Planned Consulting Hour' populates, which needs to be filled in order to define the expected time required in resolving the issue at configuration end only.
   For a better understanding on the same, refer the image below.



6. Report Name: MPR Summary Report
   Report Link -
   https://my.crmnext.com/crmnext/Report/GetReportDetailControl?x=3nc2ksnk2m6gtfgkh5jk9jjlwvtfdjbtusrs5w4suz543wtmuena&winpop=1

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