Working with FeaturePlan Editors

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The FeaturePlan Editors allow you to customize various fields throughout FeaturePlan to reflect your own organization's terminology. With the exception of the Competitors Editor, all editors are global to FeaturePlan. This allows everyone across your organization to work with the same terminology and choices.

The list of options for these fields only needs to be created once and even if any changes are made, everyone has access to the same options. An exception to this is the Competitors Editor. This editor is product specific; therefore, competitors and their products are set up for each product.

TIP: We recommend restricting access to the editors to one or two people in order to avoid over-customization of the editor values.

The editors available are as follows:

- Analyst Research Status Editor - Feature Status Editor
- Buy, Build, Partner Status Editor - Feature Type Editor
- Call Report Status Editor - Incident Report & Requirement Priority Editor
- Company Editor - Incident Report Impact Editor
- Company Category Editor - Incident Report Status Editor
- Competitive Analysis Status Editor - Market Research Status Editor
- Competitive Threats Status Editor - Opportunity Status
- Contacts Selection Editor - Opportunity Type
- Contacts Category Editor - Problem Statement Impact Assessment Editor
- Contract Status Editor - Problem Statement Status Editor
- Customer Relations Status Editor - Release Status Editor
- Enhancement Request Priority Editor - Requirement Priority Editor
- Enhancement Request Status Editor - Requirement Status Editor
- Estimate Confidence Editor - Requirement Type Editor
- Estimate Difficulty Editor - Roadmap Period Editor

- Estimate Duration Type Editor - Roadmap Type Editor
- Estimate Status Editor - Specification Status Editor
- Estimate Type Editor - Specification Type Editor
- Feasibility Study Status Editor - Task Priority Editor
- Feature Priority Editor - Task Status Editor
- Task Type Editor
- User Scenario Status Editor
- Win/Loss Status Editor
- Win/Loss Competitor Editor

To access the editors:

Do one of the following:

• From the Main menu, go to Edit > Editors, then choose the editor from the dropdown list.
• From within a record view, you can access the editors by clicking the **Edit** icon.

For details on the use of specific editors in FeaturePlan, refer to the Online Help for your FeaturePlan client.

Managing Contacts

Use the Contacts Manager (“Contacts Editor” in the Win Client) to add and manage contacts in FeaturePlan. The editor allows you to create categories of contacts with which you can differentiate between customers, prospects, corporate contributors or any other type of contact you might have.

NOTE: When adding or modifying a contact, a warning is displayed if another contact with the same e-mail value already exists. Additionally, if a company with the same email domain exists, the user will be given the option to inherit the existing company information automatically.

Even though you can add Contacts while working in FeaturePlan, we suggest you enter or import existing Contact lists into FeaturePlan instead. For more information on importing information into FeaturePlan, see “Importing & Exporting Data” on page 202.

In addition, it is better to add your contacts before you work with records such as Enhancements Requests or Requirements, as many of these records need to access the contact information.

To access the Contact Manager:
• From the Main menu, go to **Edit > Contacts**.

For details on the use of Contact Manager in FeaturePlan, refer to the Online Help for your FeaturePlan client.

Managing Companies
Use the Company Manager (“Select Company” editor in the Win Client) to add and manage companies records in FeaturePlan. The editor allows you to create categories of company with which you can differentiate between companies, prospects, or any other type of company you might have.

Even though you can add and edit companies while working in FeaturePlan, we suggest you enter or import existing company lists into FeaturePlan instead. For more information on importing information into FeaturePlan, see “Importing & Exporting Data” on page 202.

To access the Company Manager:
• From the Main menu, go to **Edit > Companies**.
For details on the use of Company Manager in FeaturePlan, refer to the Online Help for your FeaturePlan client.

Setting Up Competitors
The Win/Loss and Competitive Analysis records allow you to make comparisons between your product and that of your competitors. For this reason, we recommend that you enter Competitors information before you start working with these types of records.

Competitors are product-specific, so for each product you create, you can enter any Competitors and their products into the FeaturePlan Competitor list. Additional Competitors can be added at any time using the Competitors Editor. For more details on using the Competitors Editor, refer to the Online Help for your FeaturePlan client.

Priority Notification

Many of the editors available contain a Priority Notification field. This field allows you to override the delayed delivery setting in the Stakeholder Preferences. If this field is set for a particular value in the editor, stakeholder notification for changes to the record is not delayed if the matching field in the record is set to this value.

For example if you have a Task status values of Completed and it has the Priority Notification field set, then notification is not delayed anytime a Task that has the status field set to Completed is updated.

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