USER MANUAL

Calendar 365

“Calendar View & Functionalities”

Version: 7.1

Compatibility:
Microsoft Dynamics 365 (Online and Dataverse)

Browser Compatibility:
Edge (v12) and above
Firefox (v29) and above
Chrome (v33) and above
Safari (v7.1) and above
Opera (v20) and above

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Introduction

Calendar 365 from AppJetty is a calendar solution for Dynamics CRM. This solution by AppJetty helps you to manage your activities. It also lets you create and manage your own desired activities through Custom Activities.

With this plugin Admin User can manage the activities and the tasks in three different calendars namely **Resource Calendar** for the users, the **Customer calendar** for the customers (clients) and **Entity Calendar** for any custom or system entity..

Apart from managing activities, you can view holidays of the country specified by the admin. Later, if the activity related actions are performed, you can Complete or Cancel the activities.

Compatibility

- Microsoft Dynamics 365 (Online and Dataverse)

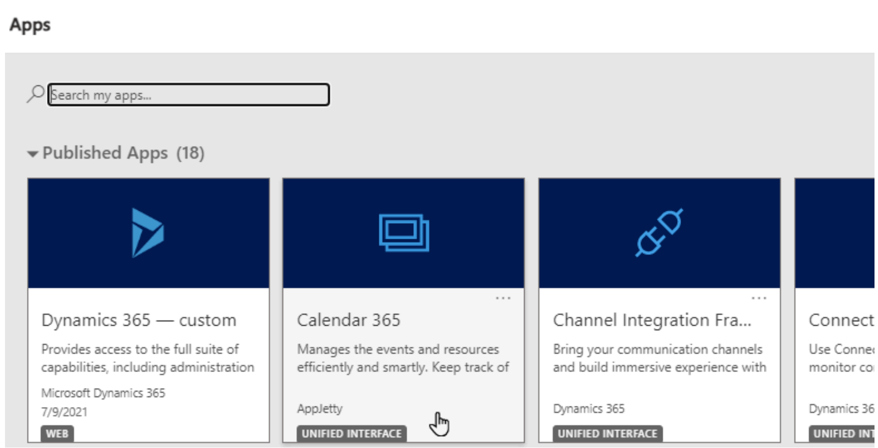
Pre-requisites

- You should be logged into Dynamics CRM 2016 or Dynamics 365, Online or Dataverse.

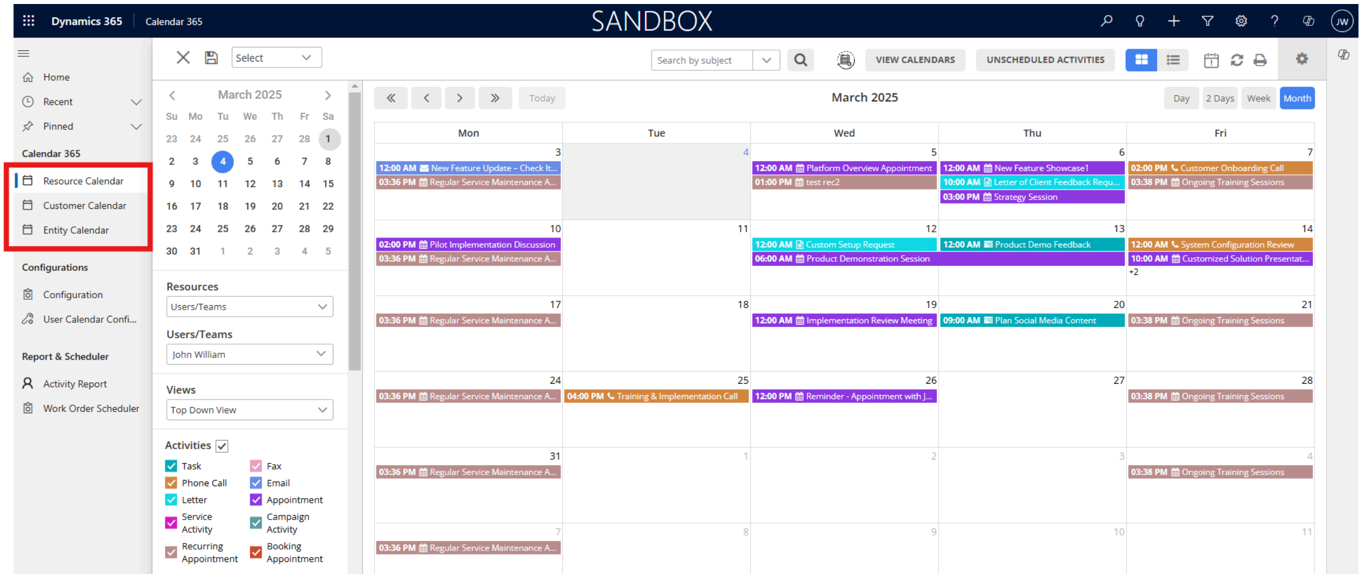
Calendar Management

Calendar 365

- Navigate to the "Apps" from the Dynamics 365 – custom page and click on the **Calendar 365**.



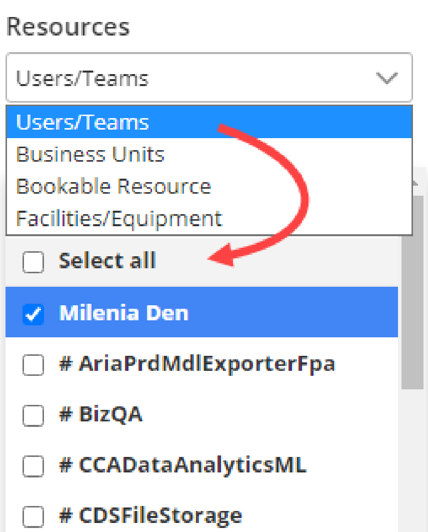
- Calendar page would load, and all the activities will be displayed in the calendar as per the **default configuration** made from the settings.
- Here, you will get three calendars: **Resource Calendar**, **Customer Calendar, and Entity Calendar**.

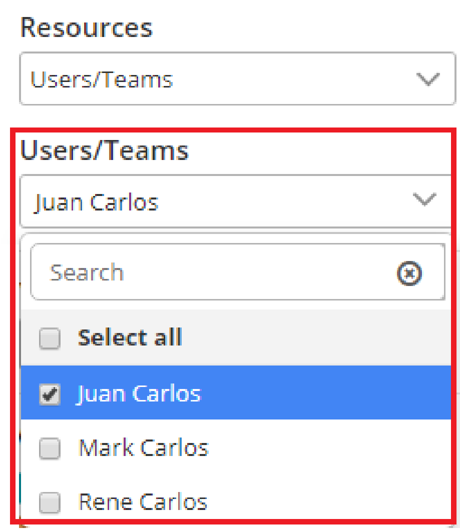


- If you want to manage activities and the records for the **Users/Teams**, **Bookable Resource** *or* **Facilities/Equipment**, select "**Resource Calendar**", to manage activities for **Contacts/Accounts** (**clients**), select "**Customer Calendar**", and to get the **Entity records** of DynamicsCRM on the calendar as per entity configuration for the calendar, select **Entity Calendar**

Resource Calendar

- "User/Teams", "Resource Booking" and "Facilities/Equipment" resources can be found in Resource Calendar.





  - If **User/Teams** option is selected as resource, it displays list of users in multiple selection dropdown. User/Teams is a user and a member of your organization.

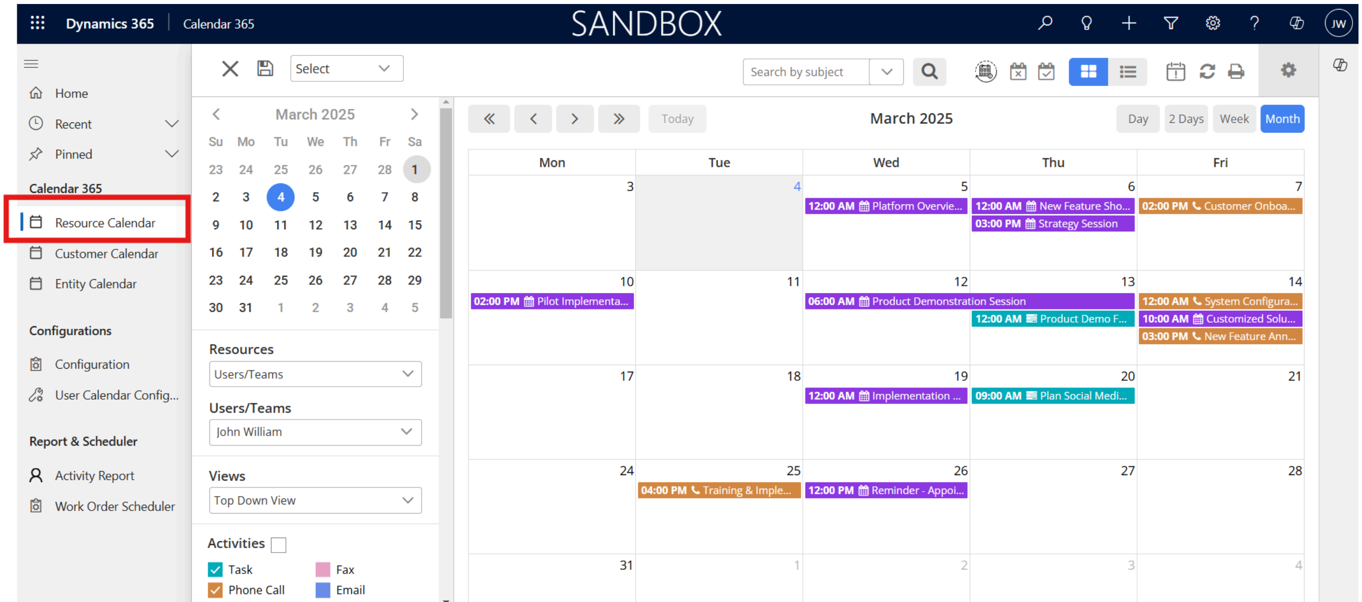
    If you have selected the **User/Teams** as "Resources", the list will be displayed, and you can enable/disable the Users/Teams by selection.

  - If **Business Unit** option is selected as "Resources", it displays the business units of the organization like departments or divisions that have separate products, customers, and marketing lists.

  - If **Bookable Resource** option is selected as "Resources", it displays list of Bookable Resources in multiple selection dropdown. A Bookable Resource in Field Service is anything that needs to be scheduled. Scheduling Board for Field Service & Project Service Automation.

  - o If **Facilities/Equipment** is selected as “Resources”, it displays list of facility/equipment in multiple selection dropdown. If the resource is a physical space that needs to be scheduled, such as a building or room, select Facilities/Equipment.

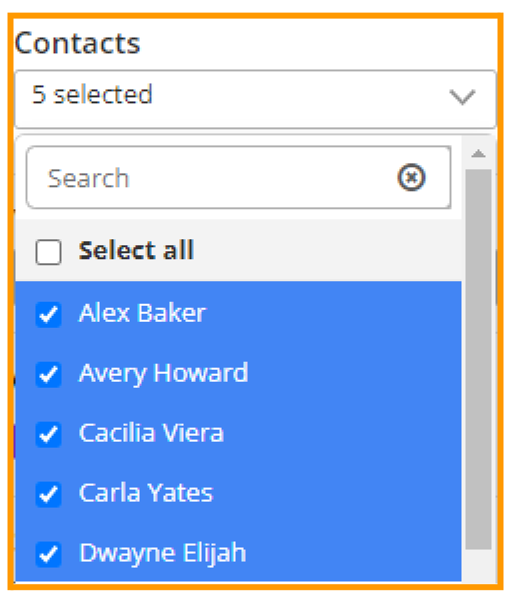
- You will get the records on the calendar based on the “Resource” and its records selection.

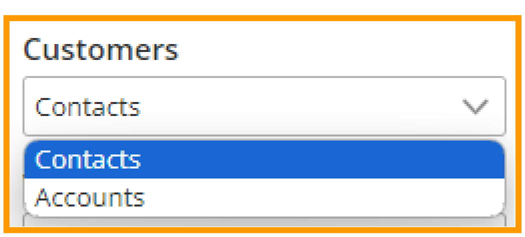


Customer Calendar

- You will get “Accounts” and “Contacts”.
  - o If **Contact** and **View** is selected as resource, it displays a list of the respective contacts in multiple selection dropdown. These will be available only when contact and view are selected from the dialog box.
  - o If **Account** and **View** is selected as resource, it displays a list of accounts in a multiple selection dropdown. These will be available only when account and views are selected from the dialog box.

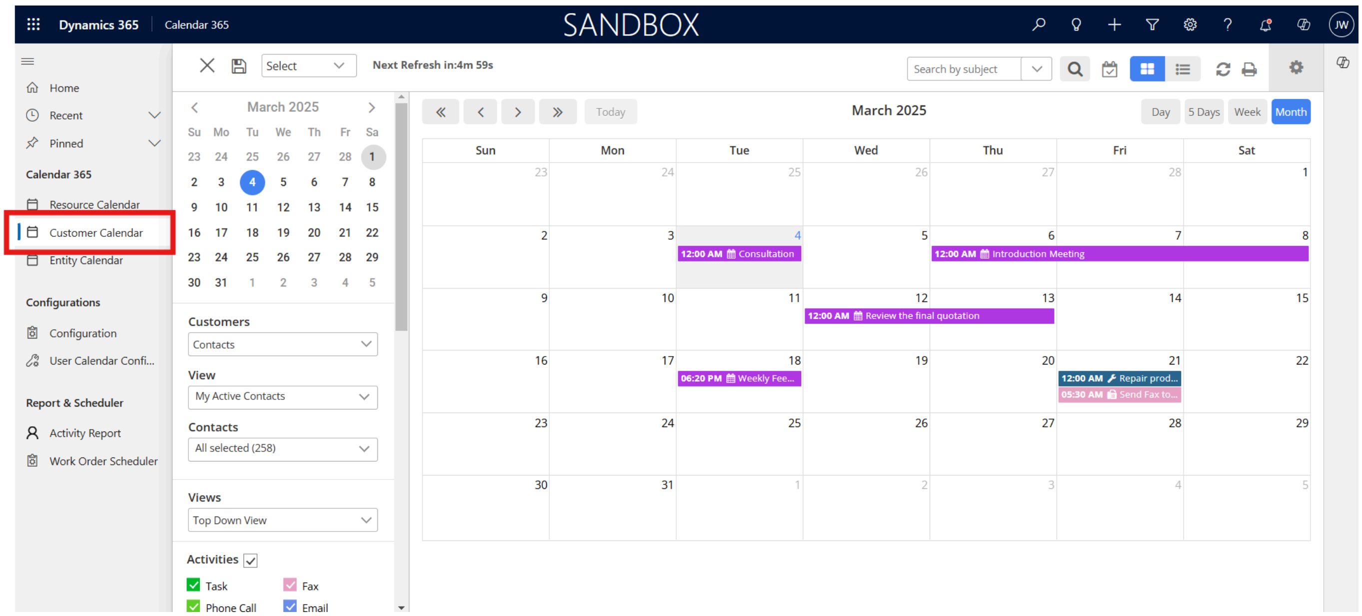
- Based on Customers and View selection, activities in the calendar will be displayed.





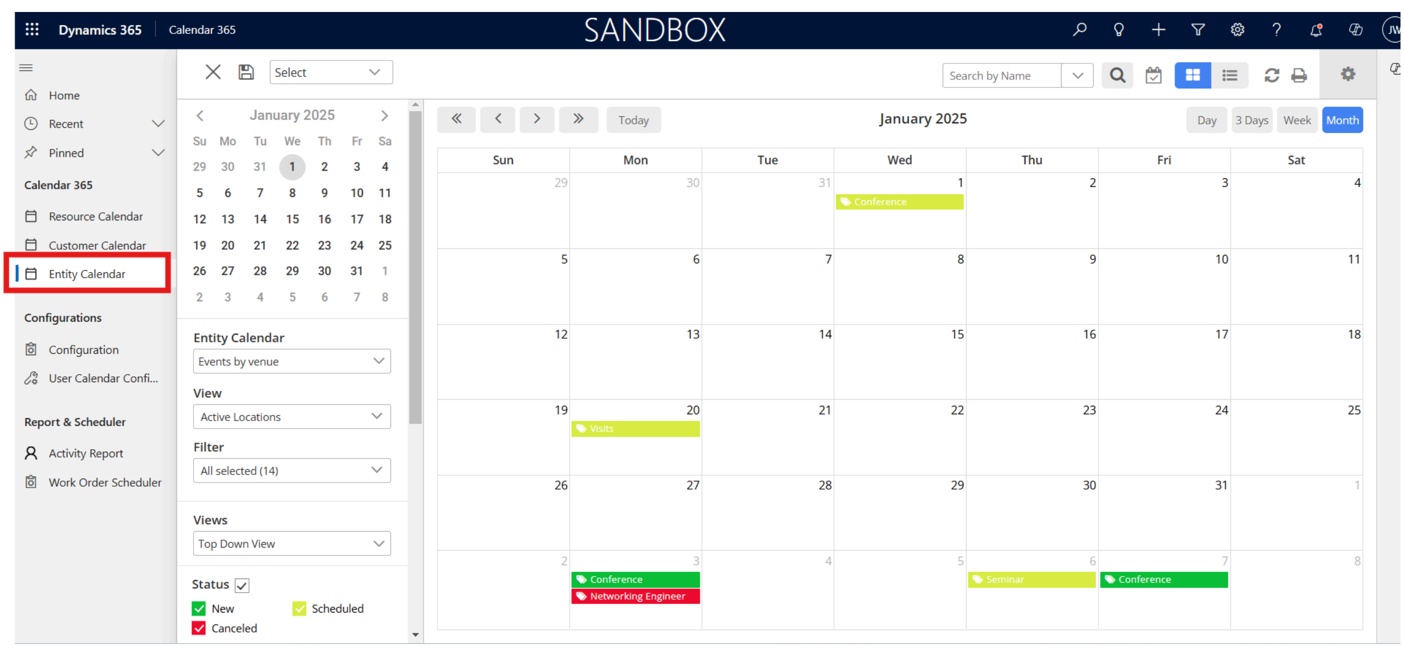
Note: Only the system administrator can view the calendar along with the activities of all the users or resources. Other users can view the calendar of only their team or an individual depending on their respective role.
- Activities that have account or contact mentioned within regarding field, those activities are viewed in calendar upon selection of that account or contact, respectively.

- You will get the records on the calendar based on the "Resource" and its records selection.

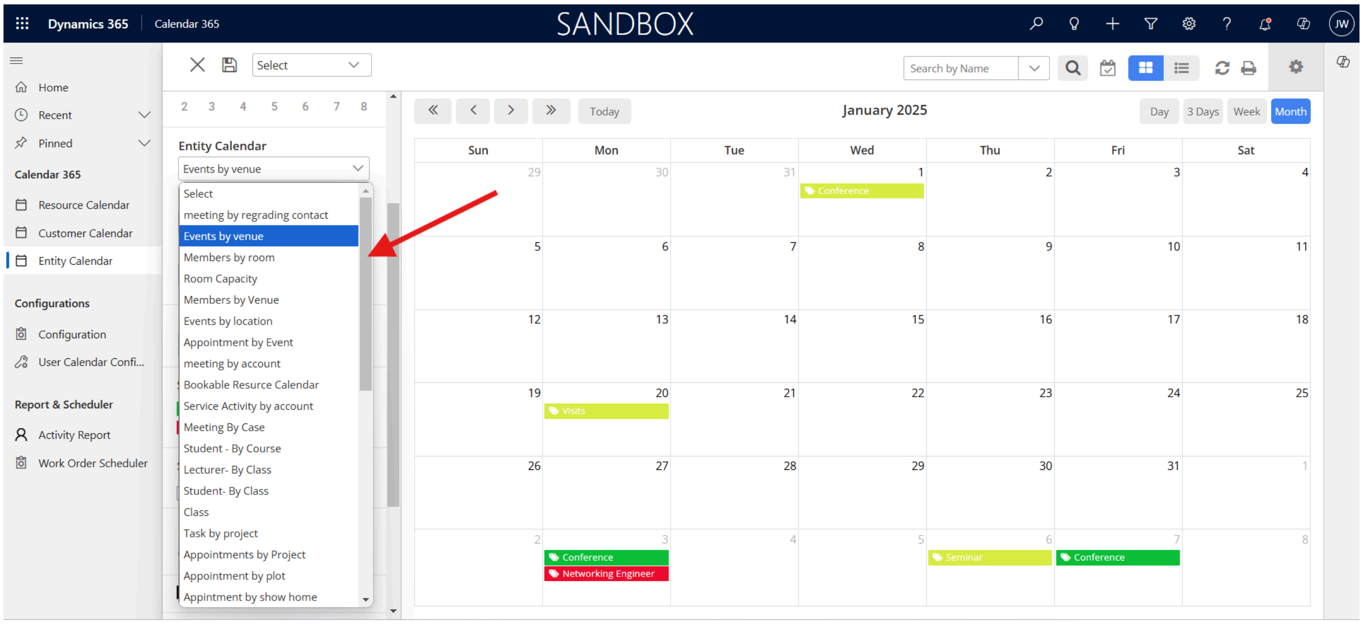


Entity Calendar

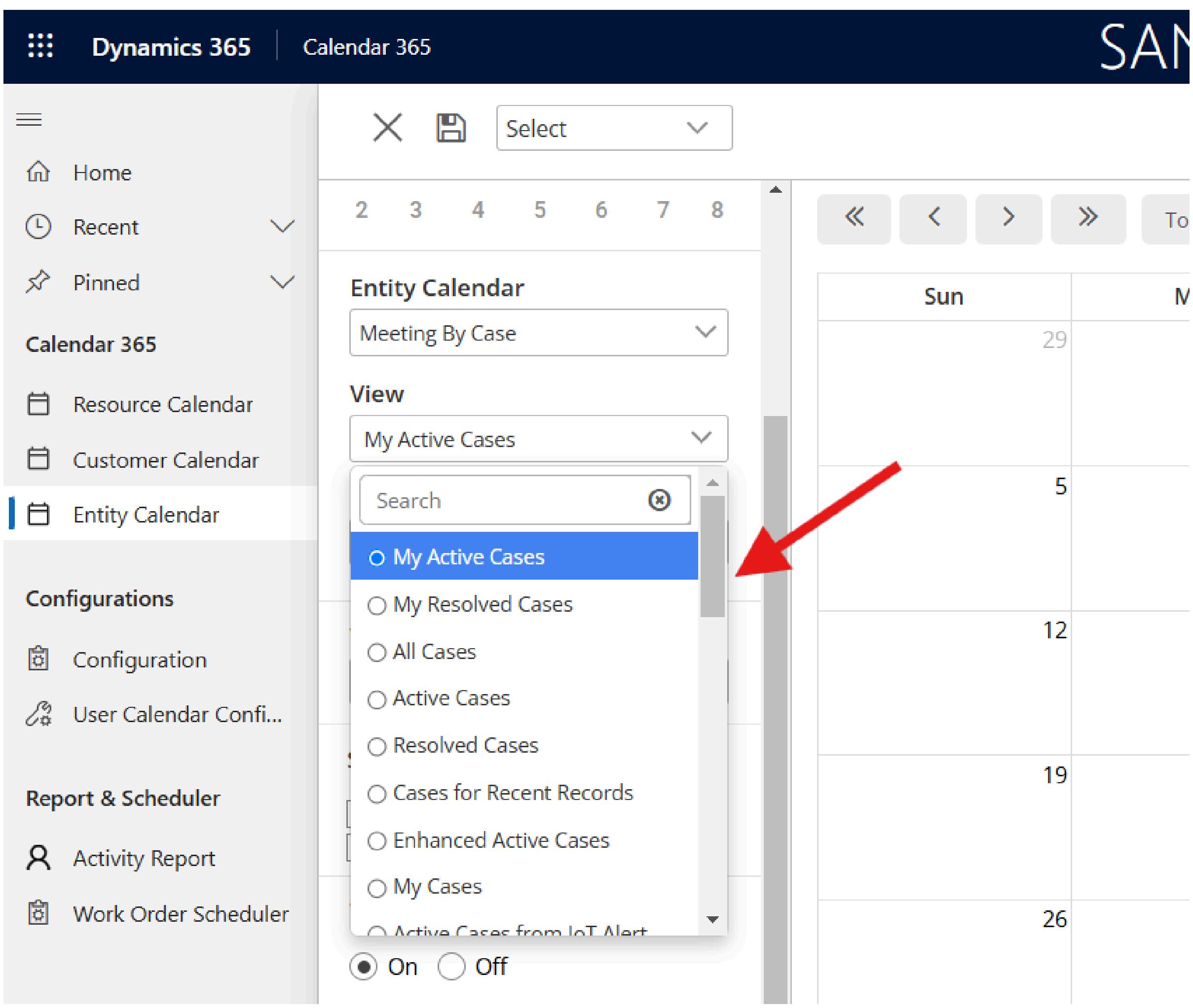
- By clicking on the "Entity Calendar", you will check the entity records on the calendar as you have configured under the "Entity calendar" from the Calendar setup.



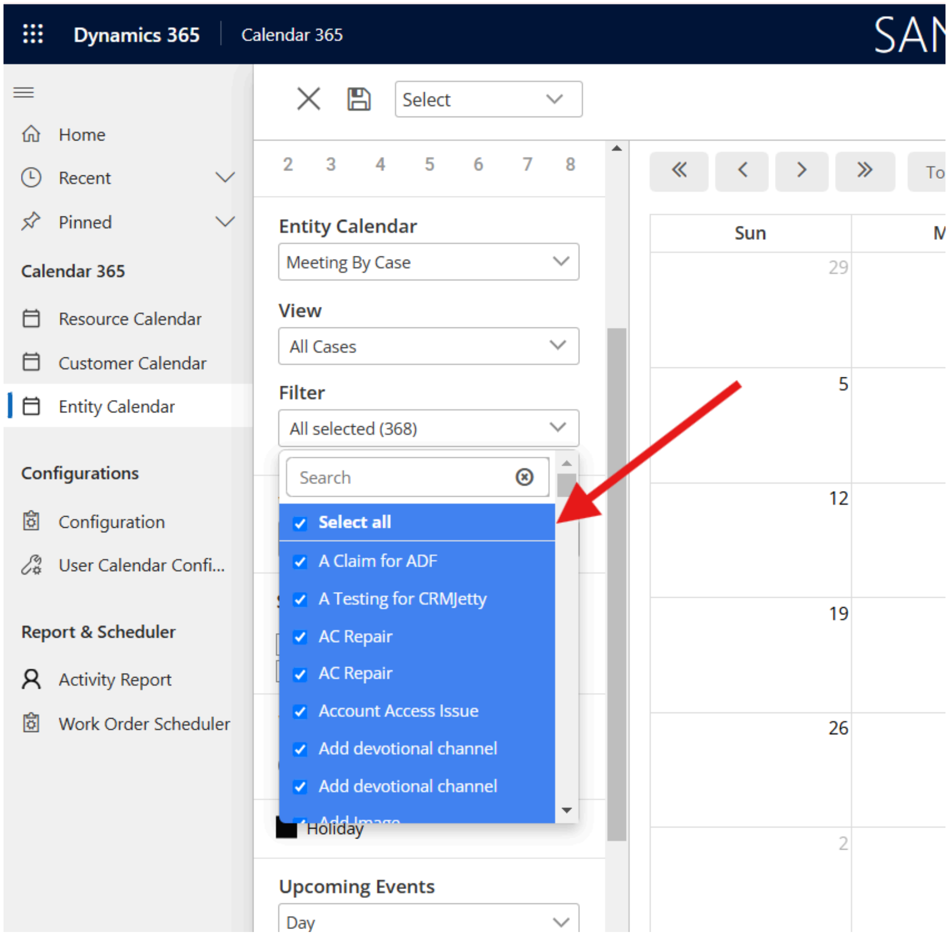
- From the left navigation, by clicking on the "Entity Calendar" dropdown, you will get the list of Entities that you have configured.



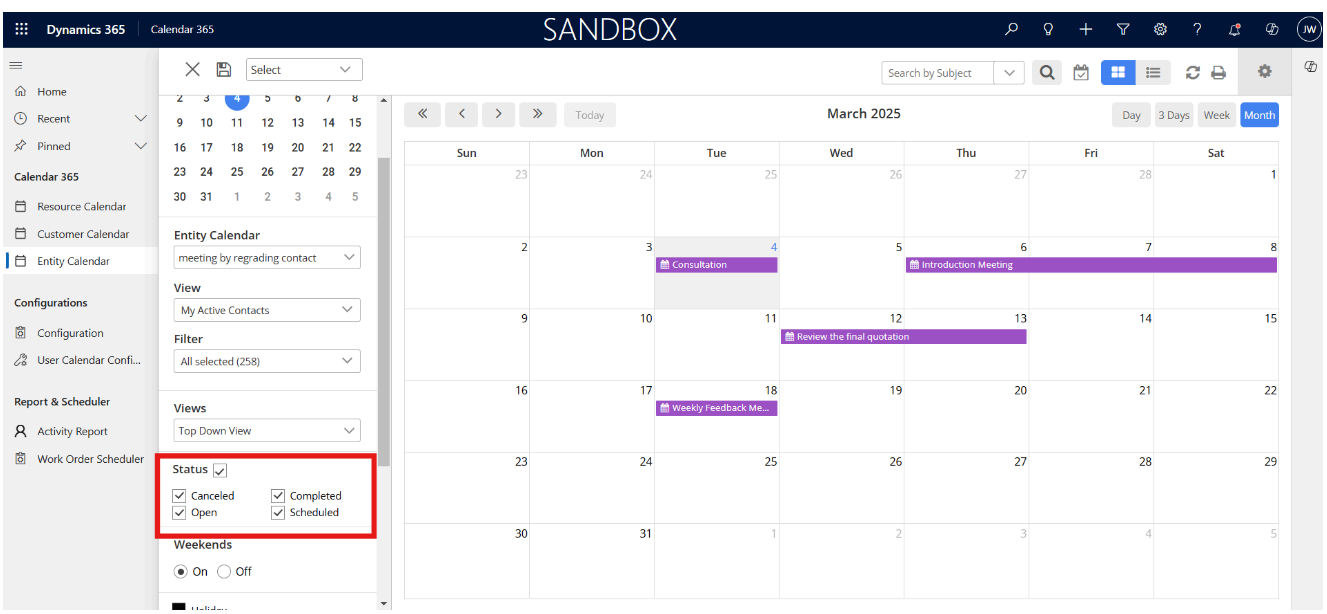
- Once you select the entity, the “View” will be displayed as per the entity that has been selected. Select the “View” accordingly.



- As per entity attribute selection, you will get the values for the selected entity, and based on that the CRM activity records will be displayed on the calendar.



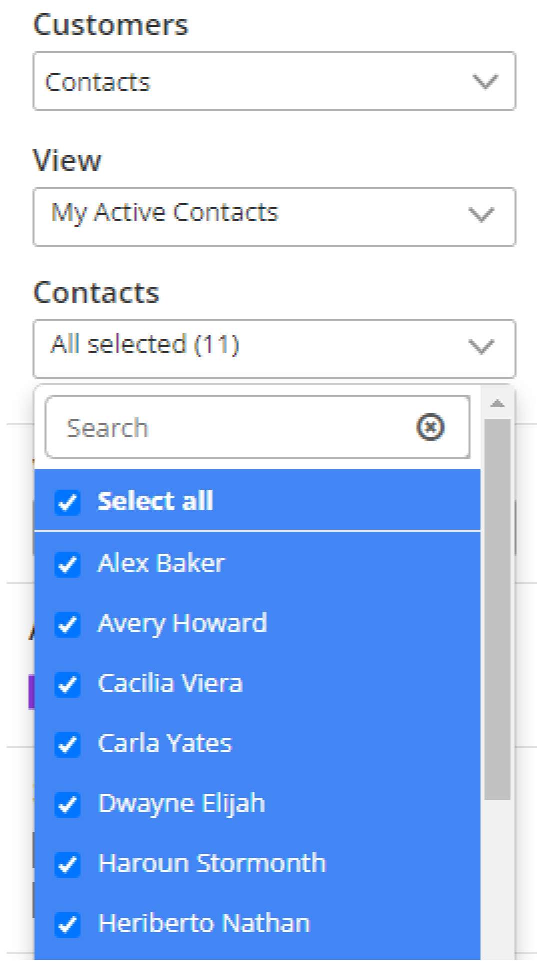
- You can also filter the data on the calendar by selecting its status i.e. **Canceled, Open, Completed** and **Scheduled.**



- You can save the entity calendar for your future use, and it can be shared with your team members as well.

Related Entities

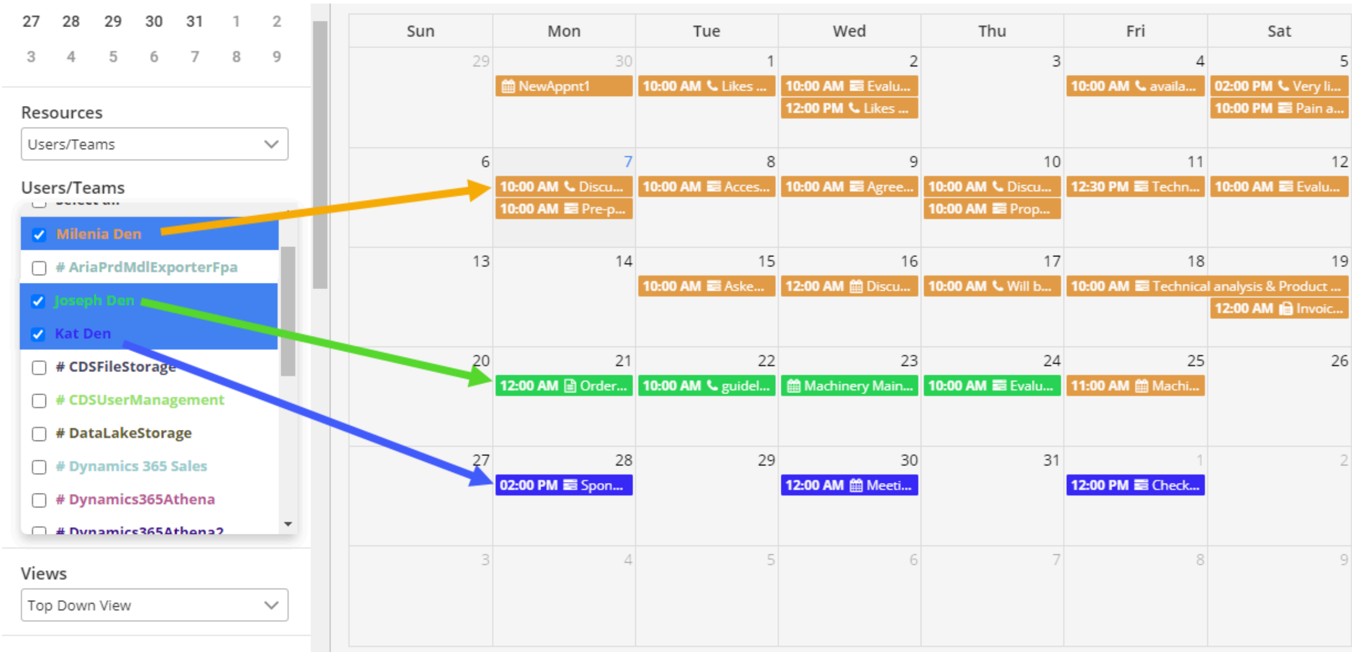
- On selecting Accounts or Contacts, **Related Entities** section will be titled as per the "Customers" are selected.
- If "Contacts" or "Accounts" is selected in **Customers** then the "Contacts" or "Accounts" section respectively will be displayed and the dropdown will consist of the respective related entities where the user can select one or more related entities.



Note: Related entities dropdown will be shown only if entities are selected from the configurations page. And activities will be shown if these related entities have activities created within their record.

Owner wise Colorized activity

- If you have enabled the owner wise color option and set the specific color to different owners, the activities of the different owners will appear on the Calendar based on the Owner's color.
- On the Calendar, users can see the colorized activities based on the selected color for the specific owner (users). *i.e.,* the orange color activities belong to the user Milenia Den, the green color activities belong to the Joseph Den and the blue color activities belong to the Kat Den.

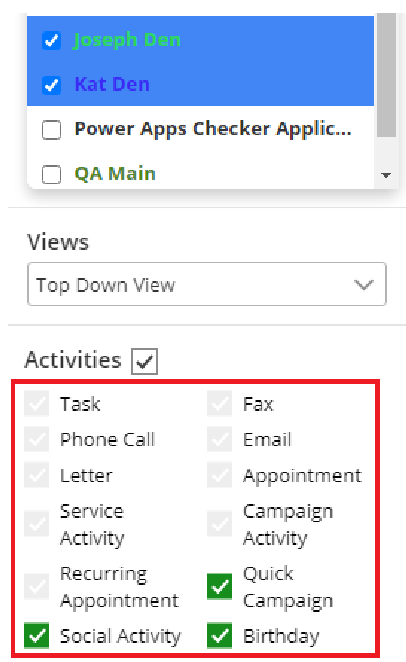


- These Color specific activities option helps admin or users to clarify the activities.

Note:

- The user can see different color combinations activities for specific users only under **Resource Calendar**.

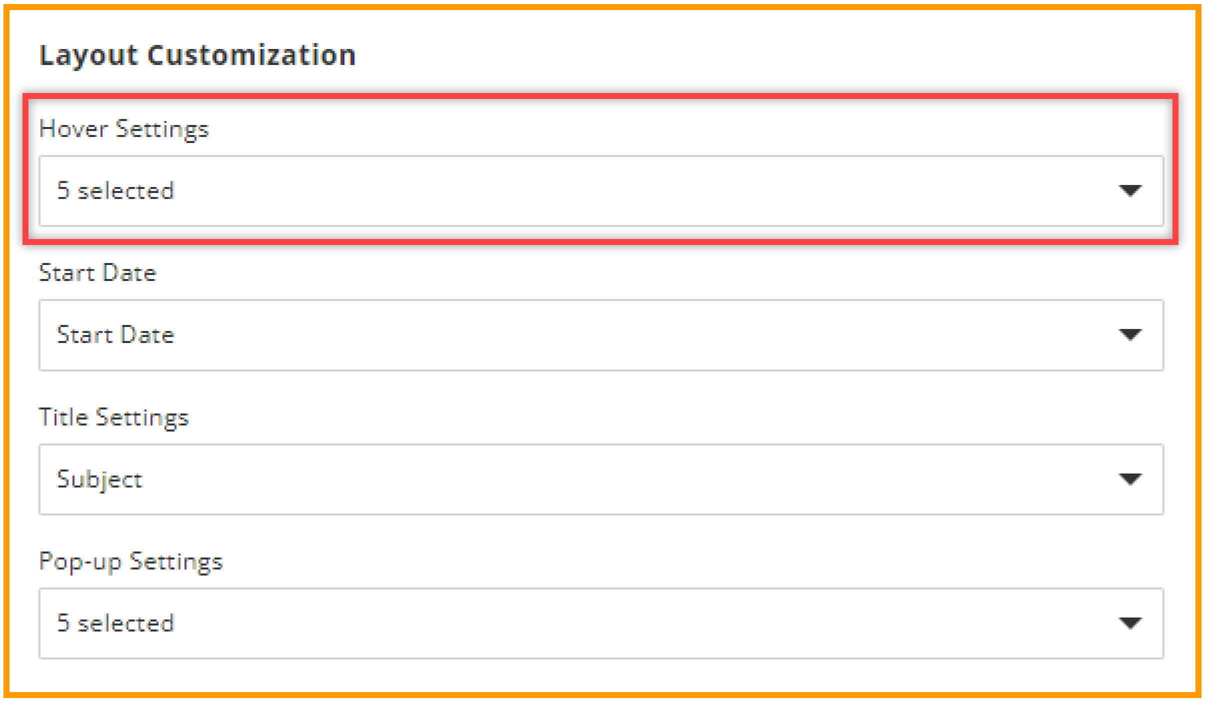
- Once you have selected the Owner Color option, the individual color of the activities will be disable and the user wise colorized activities will display on the calendar.



Activity Details

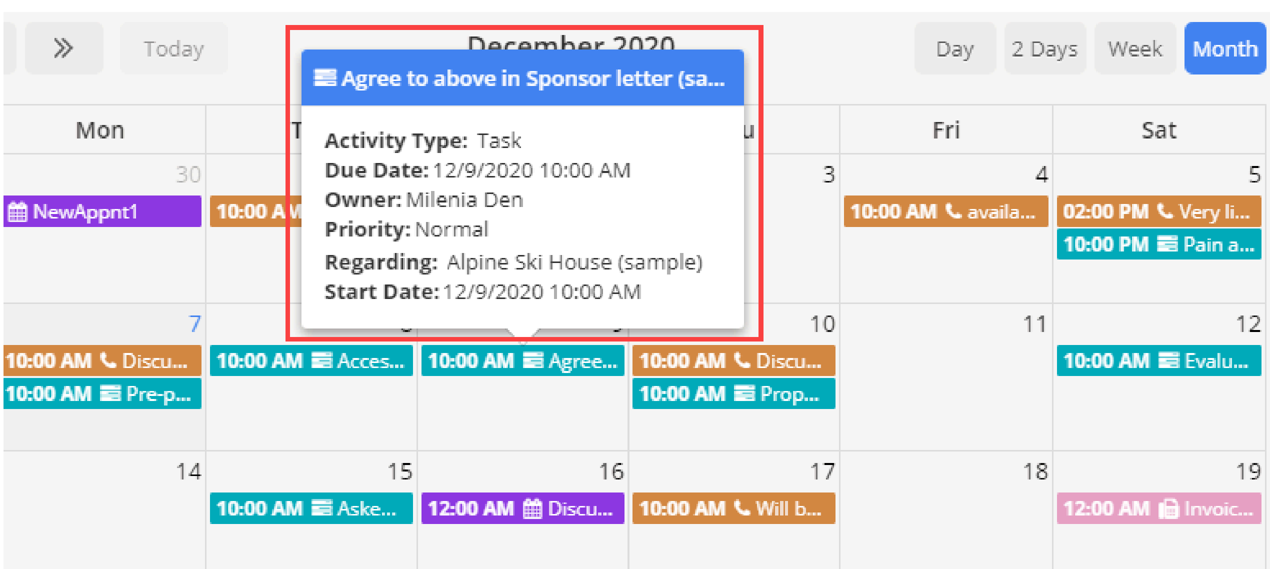
Setup for Hover Settings:

- To set up the Tooltip view of activity, navigate to **Setup** ➢ **Activities** ➢ **Custom Activity** where you will find the ‘**Hover Settings**’ under the **Layout Customization**.



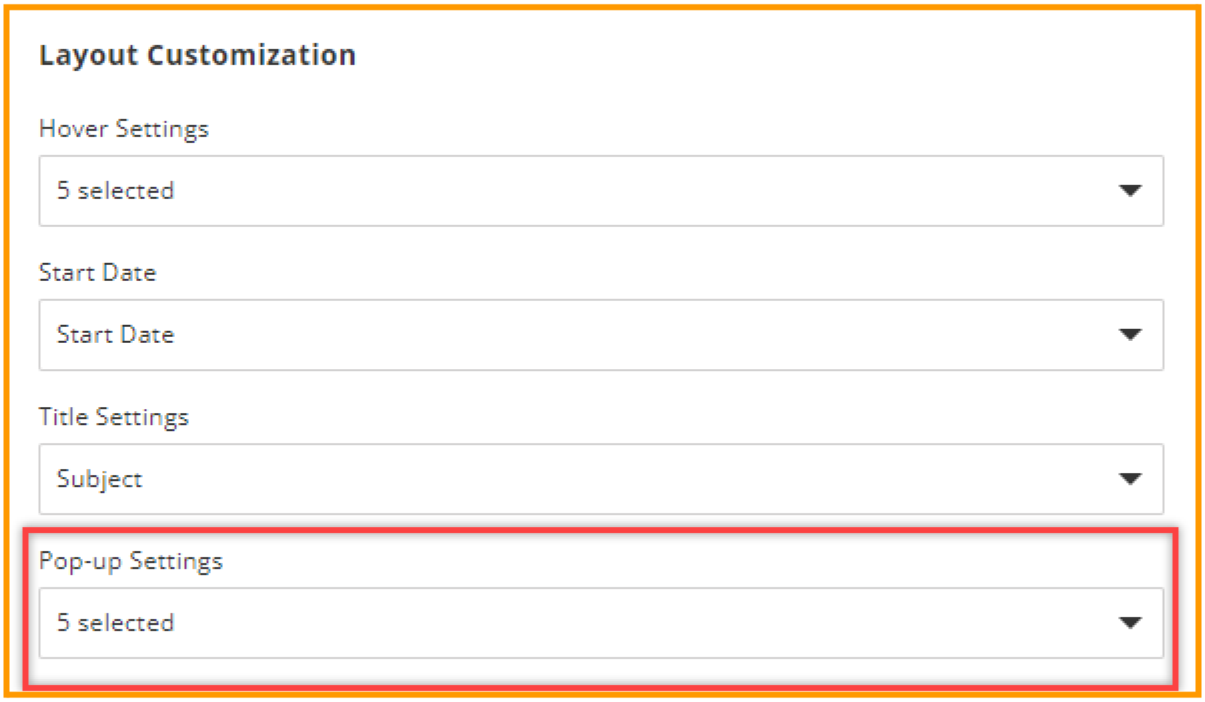
Tooltip on Calendar

- Hover the mouse on the activity, then the activity details can be seen in **tooltip view**.



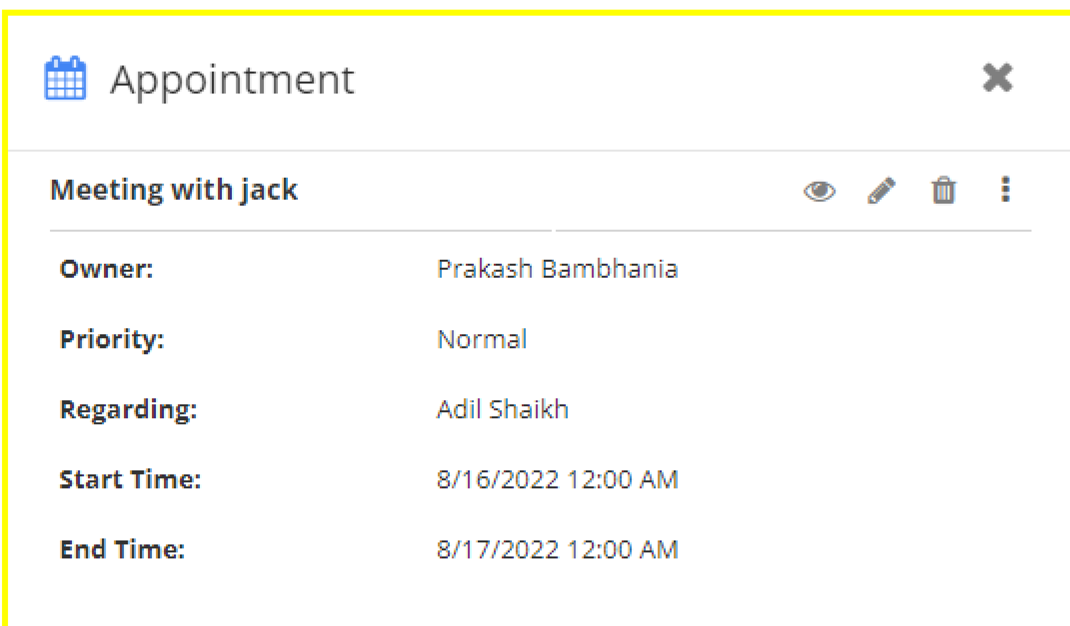
Pop-up Settings:

- To setup the Tooltip view of activity, navigate to **Setup ➢ Activities ➢ Custom Activity** where you will find the '**Pop-up Settings**' under the **Layout Customization**.

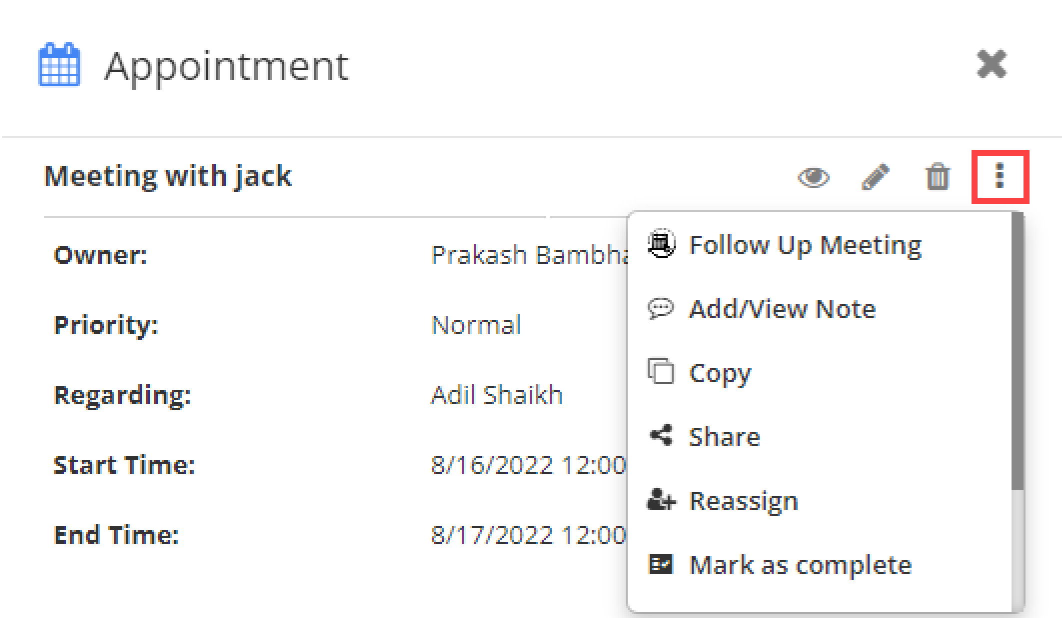


Activity Detail view on Calendar

- To view the 'Activity Details', click on the activity, then the details can be seen in **detail**.

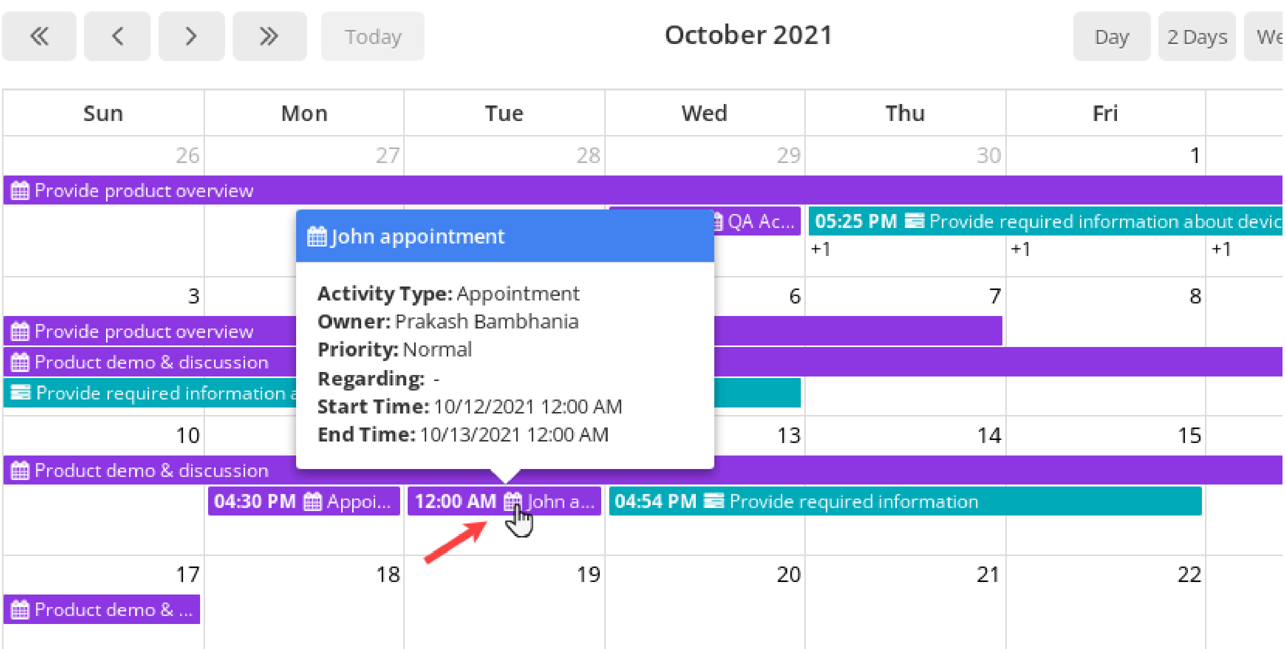


By clicking on the **More options (Three Dots)** icon, you will get additional options like **Follow up meeting**, **Add/View Note**, **Copy**, **Share**, **Reassign**, **Mark as Complete**, **Mark as Cancel**, **Convert to Opportunity**, & **Convert to Case**.

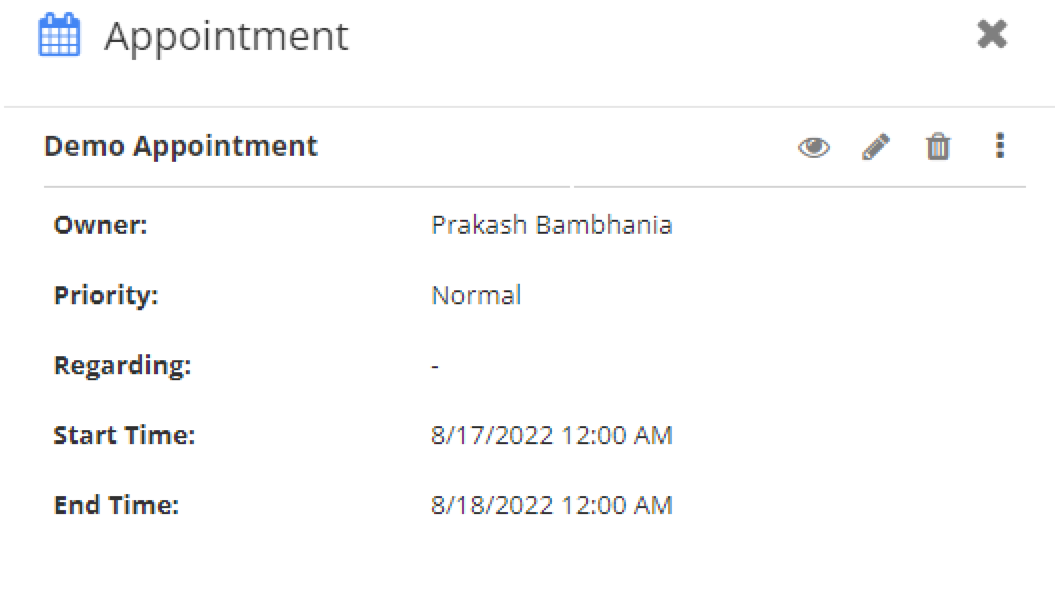


Activity View Direction

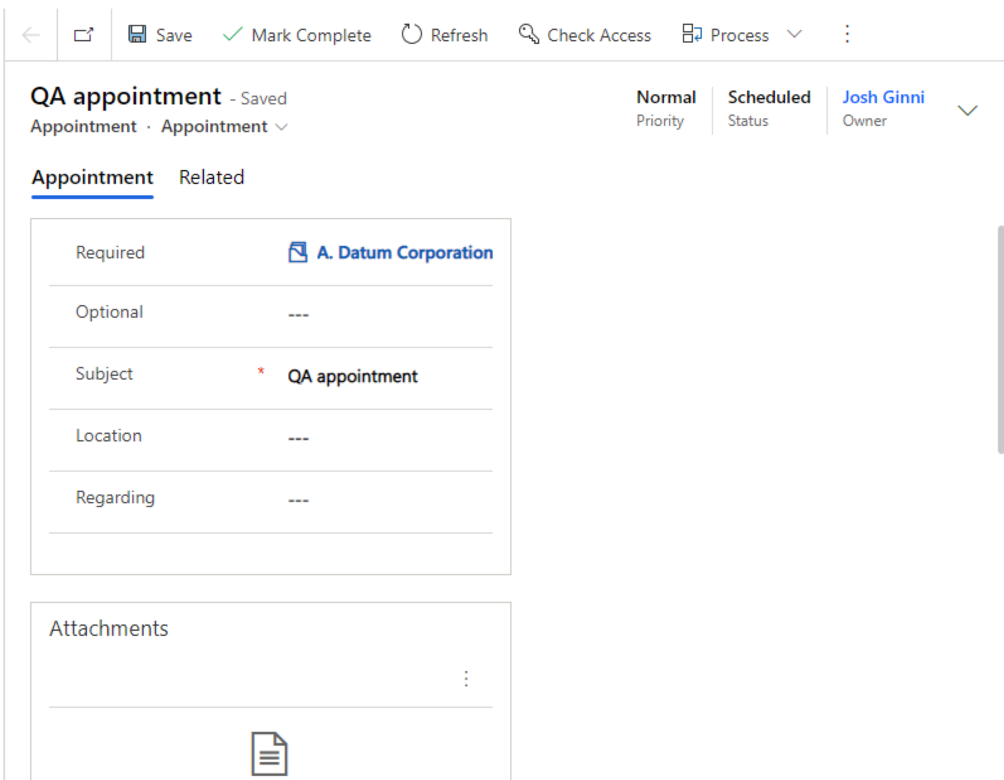
- By clicking on the activity, the activity details will be displayed in the Popup or in the CRM view as per the “Activity View Redirection” selection in the Calendar Settings.



- If the “Popup” is selected, you will get the activity details in the popup. You will see the details of the activity as configured in the “Details Attribute”



- If the CRM View is selected, you will see the activity details in the CRM view.

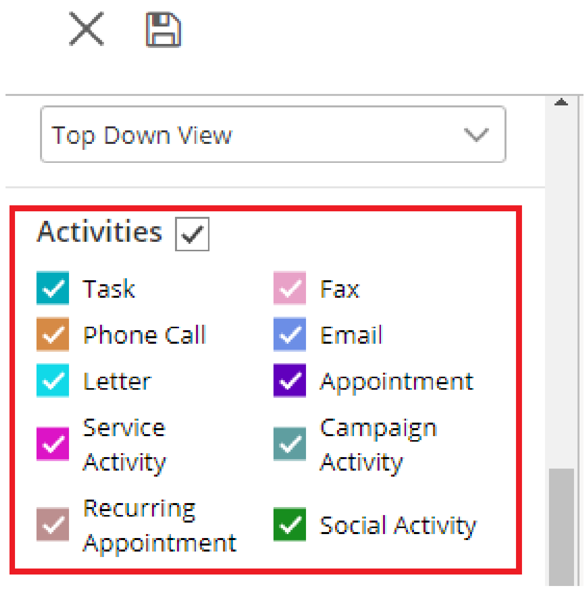


Note: "Activity View Redirection" setting is also provided at the user level (User Calendar Configuration). So, the users who have AppJetty Calendar 365/System Administrator rights will be listed in the User Calendar Configuration. You can configure the Activity View Redirection at the user level.

Left side panel options

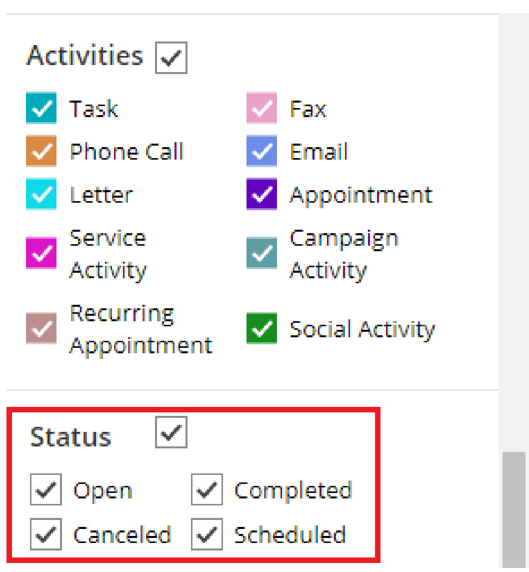
Activities

- To manage the activities which are to be displayed in the calendar, navigate to the 'Activities' section on the left-hand side of the calendar.
- Thereafter, check the checkbox besides the activity to display the particular activity in the calendar. Here it will show only those activities that are enabled from the configurations page.



Status

- To view the activities as per their statuses, navigate to **'Status'** section and check the checkbox besides each option to display the activities with statuses in the calendar.



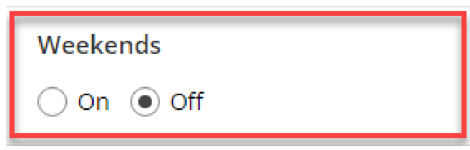
> **Note**: If you have selected the Overwrite Color **by Status** in activity configuration, the status of activity can be displayed in that color which is selected in 'Overwrite Color' option.

Priority

- Now to view the activities as per the priorities, navigate to the **'Priority'** section and check the checkbox besides the priority.
- This would overwrite the actual color of the activity and display the activity in the color as per the priority of the activity.

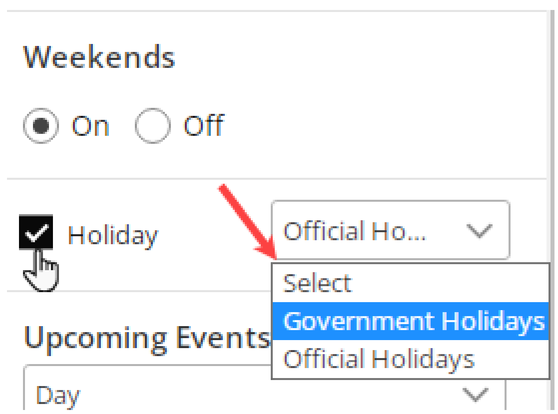
Weekends

- To enable / disable weekends in the calendar navigate to the **'Weekends'** section.
  - To enable weekends select **'On'** button.
  - To disable weekends, select the **'Off'** button. The columns of 'Saturday' and 'Sunday' will disappear.

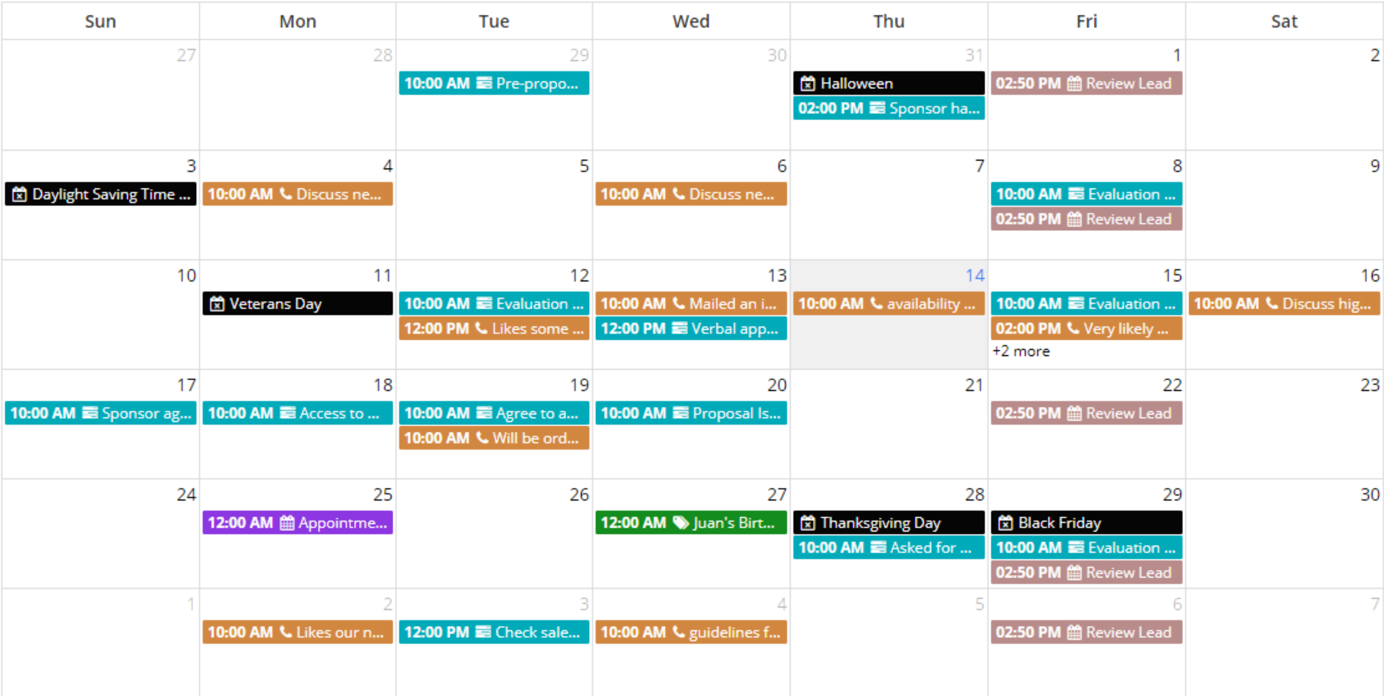


Holidays

- To enable holidays in the calendar, navigate to the **'Holidays'** section and tick the checkbox.



- By ticking the **'Holidays'** checkbox, you will get the drop-down list of holidays if you have added the multiple CSV files of the holidays.
- Here, you will get the default selected holidays if you have selected any default from the Holidays configuration.

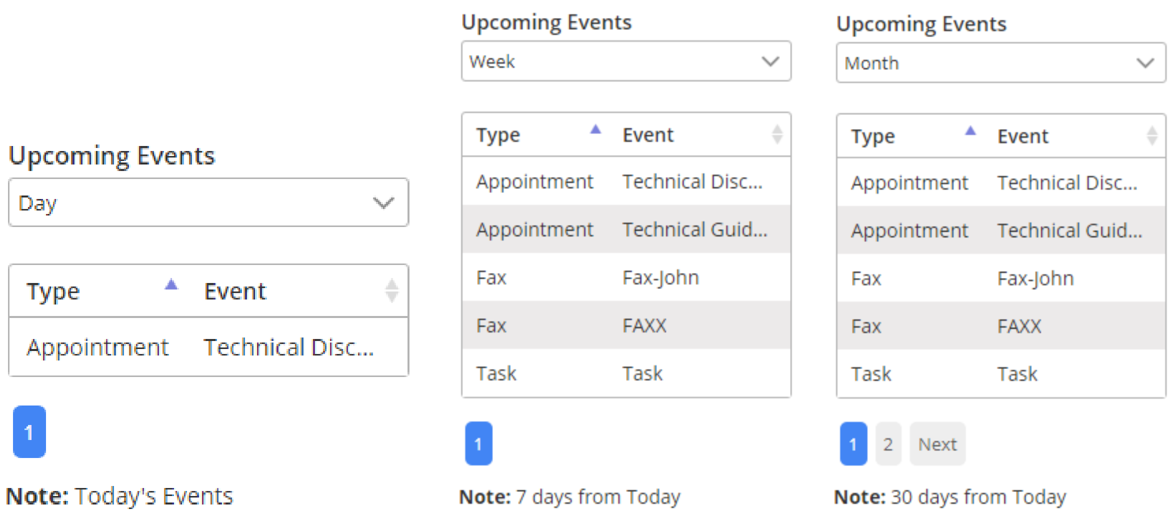


- You will see all the holidays in the calendar which is by default in a black-colored background. If you have selected the specific color for the holidays from “Calendar Configuration → Holidays” in the “Color” field, you will get the Holidays details in that color.

Note: Holidays will be displayed as per the country selected by the admin from the Calendar 365 Configurations.

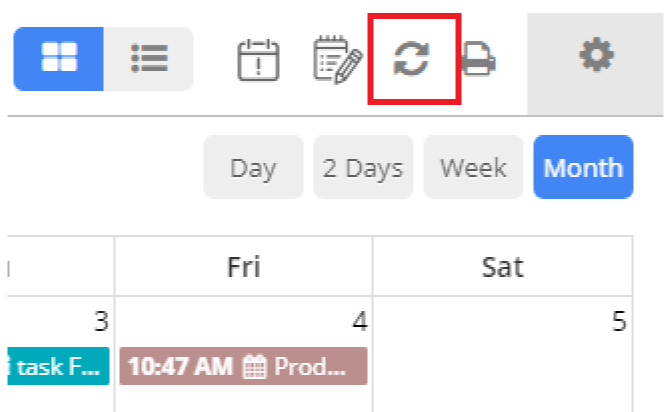
Upcoming Events

- To view a list of upcoming events, navigate to **'Upcoming Events'** section, from here you can select the type of view and view the upcoming events as per the 'Day', 'Week' or 'Month' format.
- Upcoming events will be displayed based on resource selected.
- Example: If the account is the selected resource type, it displays upcoming activities related to the accounts selected.



Refresh

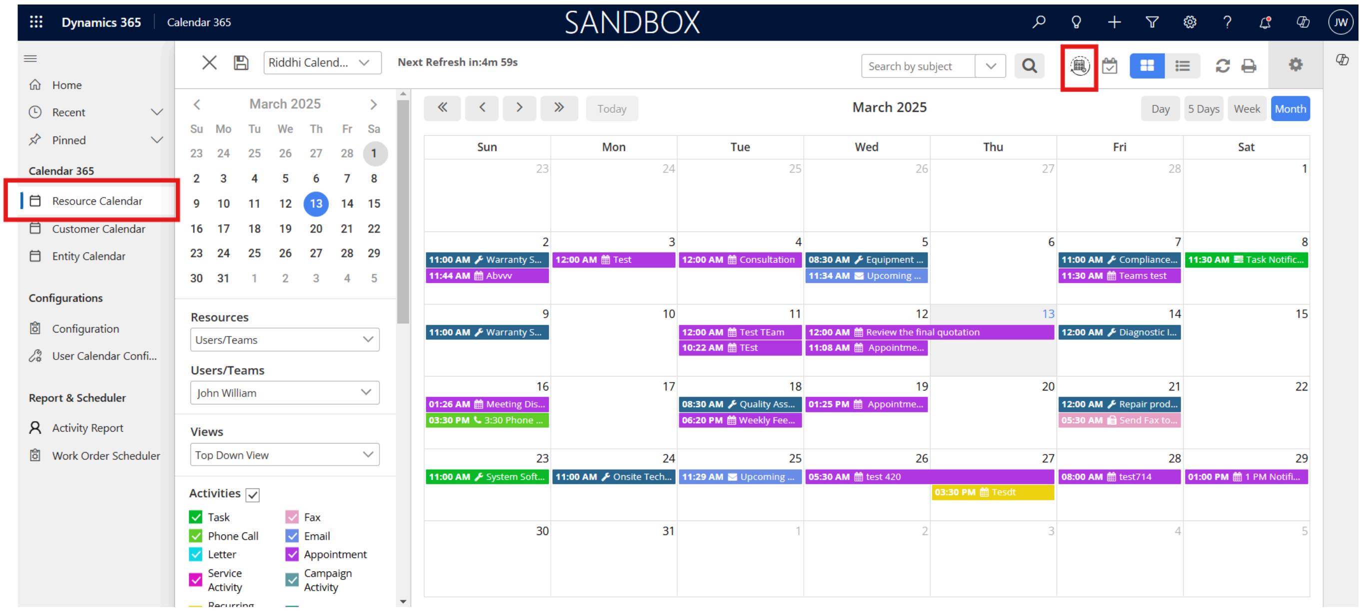
- To fetch all the events or activities from the CRM, click on the **'Refresh'** icon on the right-hand side of the calendar.



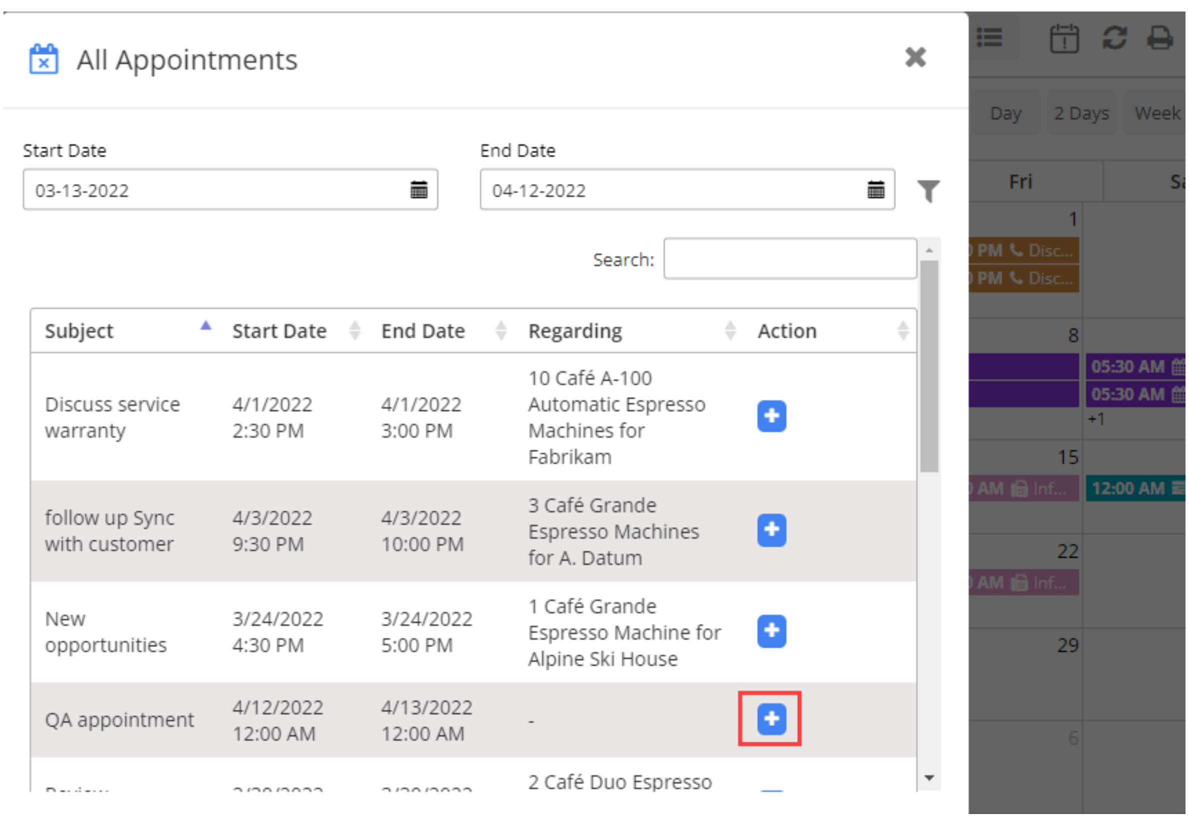
Note: After changes in configuration, you must **Refresh** to view the applied changes.

Follow Up Appointment

- You can create follow-up meetings when you want to discuss recurring topics or previous meeting topics that were not closed in an earlier meeting.
- There are two ways you can create follow up appointments - All Appointments, and Inside Appointments.

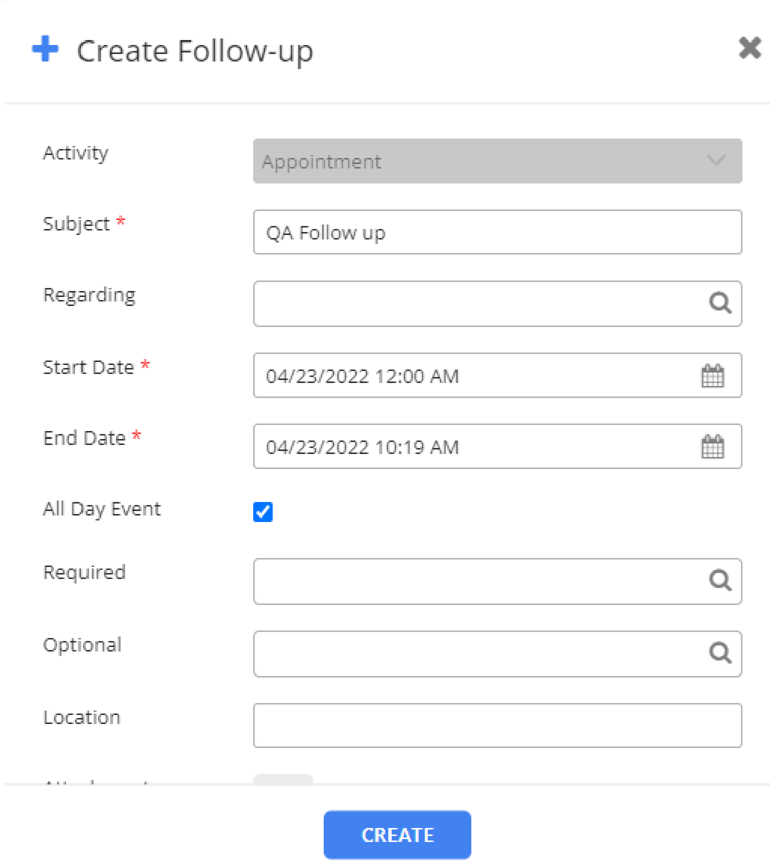


- Once you click on the **Follow Up** Icon, you will get the list of “**All Appointments**”. You can filter the appointments by entering the **Start & End Date**. You can also search the appointments.

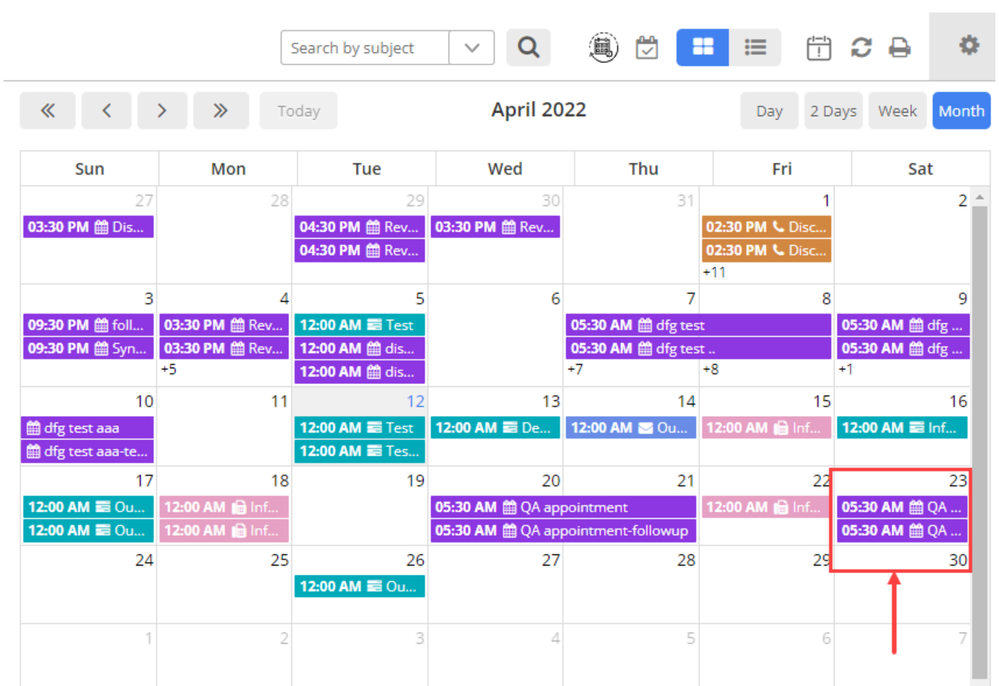


- To create a follow-up appointment, click on the “**+**” button of the particular appointment.

- Once you have clicked on the button, **Create Follow-Up** pop up will open up where you have to fill the information.



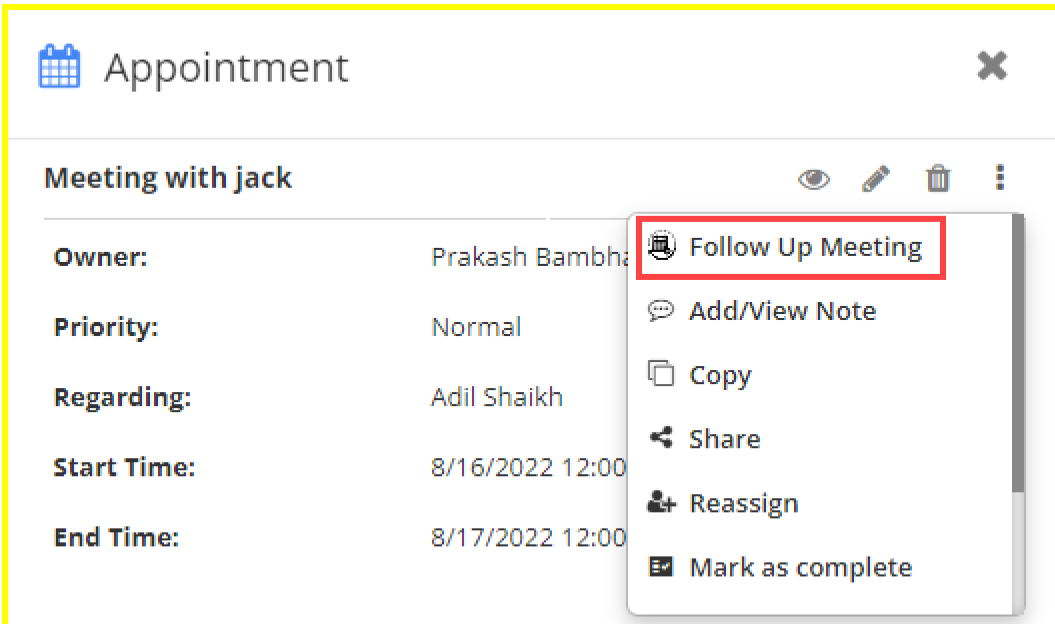
- After filling in the information, click on the **Create** button.



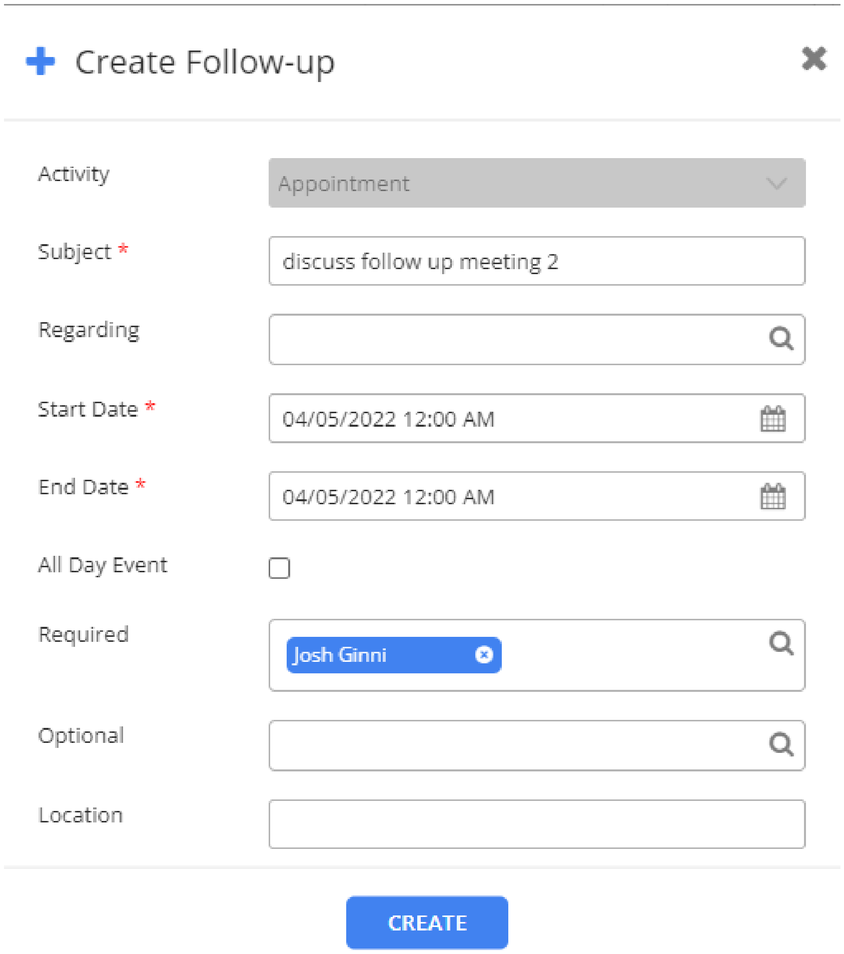
- When the user clicks on the Appointment, it will get all the information related to the following appointment.

Inside Appointment

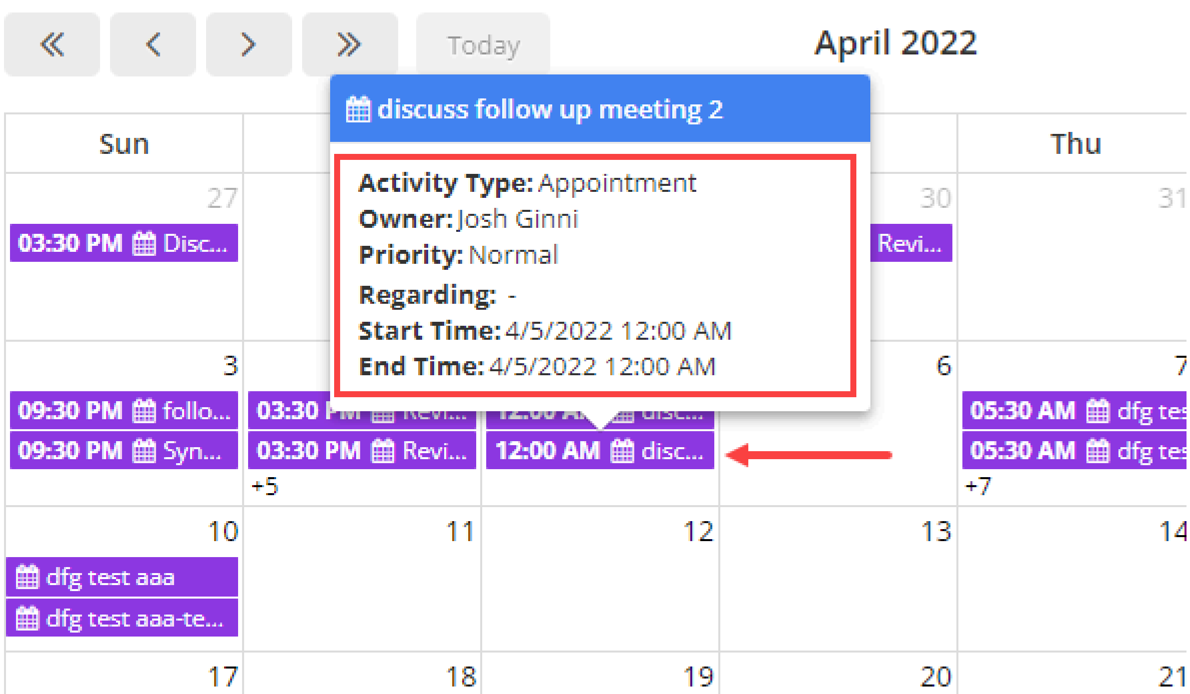
- You can also create a follow-up meeting by clicking on the particular appointment.



- Click on the **Follow-up Appointment** icon, fill in the appointment details and click on the Create button. You can also view the parent appointment details by clicking on the "Parent Appointment" link.

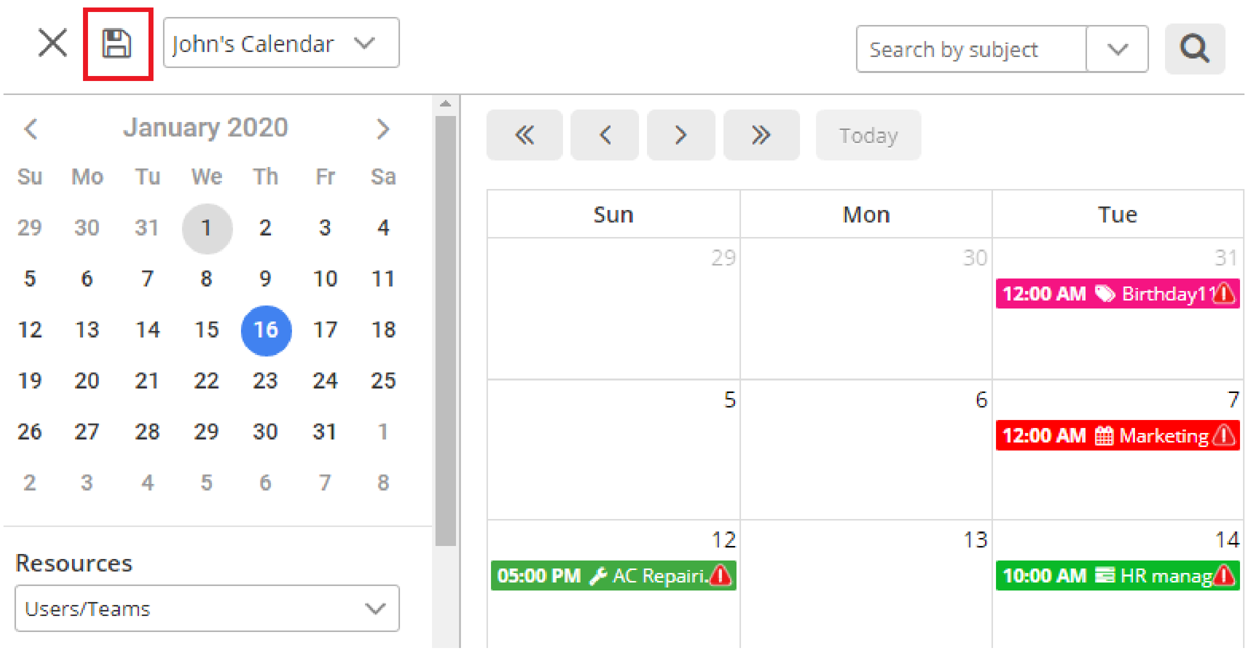


- Once the follow-up is created, it will be listed under the respective appointment on the calendar.

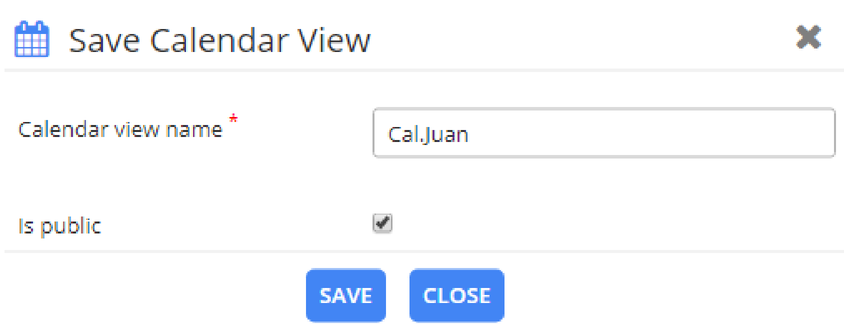


Save and Share Calendar Views

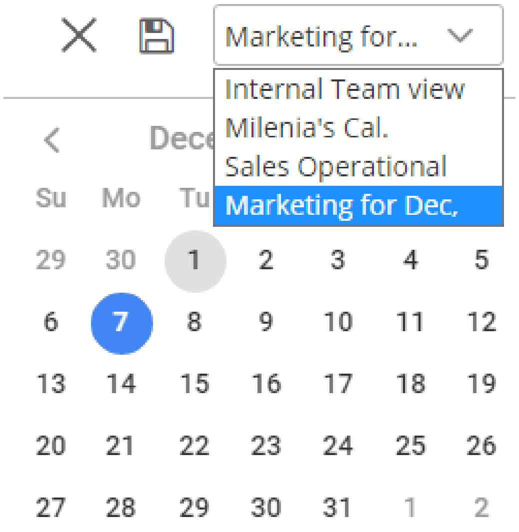
- You can also **Save** and **Share** any calendar view in Resource Calendar and Customer Calendar for future reference.
- Left panel Settings like selected resources, selected calendar view as well as, activities, selected status, priority, weekends and holidays get saved on saving view.
- You can save the calendar view on resource selection. If certain calendar settings are **saved** for **user** resource type, that calendar view will **not** be **available** to **accounts** or **contacts**.
- To save a view, click on **'Save'** icon available on the left side of the calendar.



- After you click on 'Save' icon, a dialog box opens, where you need to define the calendar view. Along with naming, you can define if it's public or private.
- By default, **'Is Public'** checkbox is checked. If the calendar is public, it is visible to all CRM users with AppJetty Calendar role under shared calendars section.

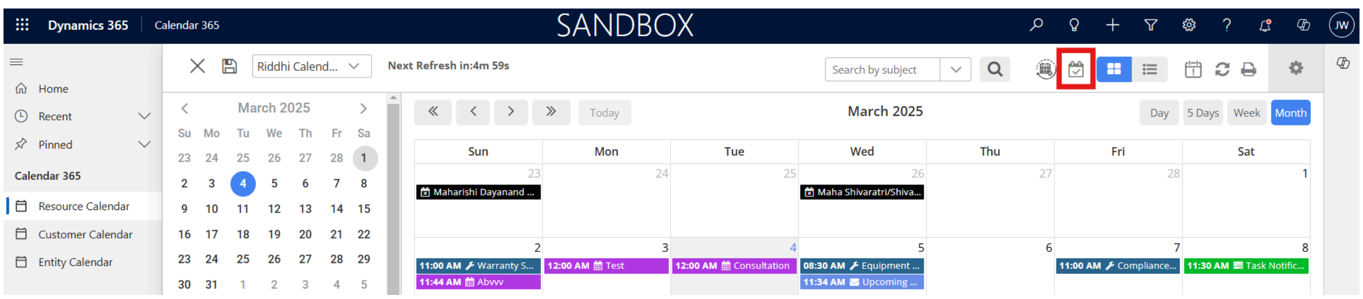


- Click on 'Save' button to save the calendar view.
- On the header, the 'Calendar View name' will be appeared in left side.

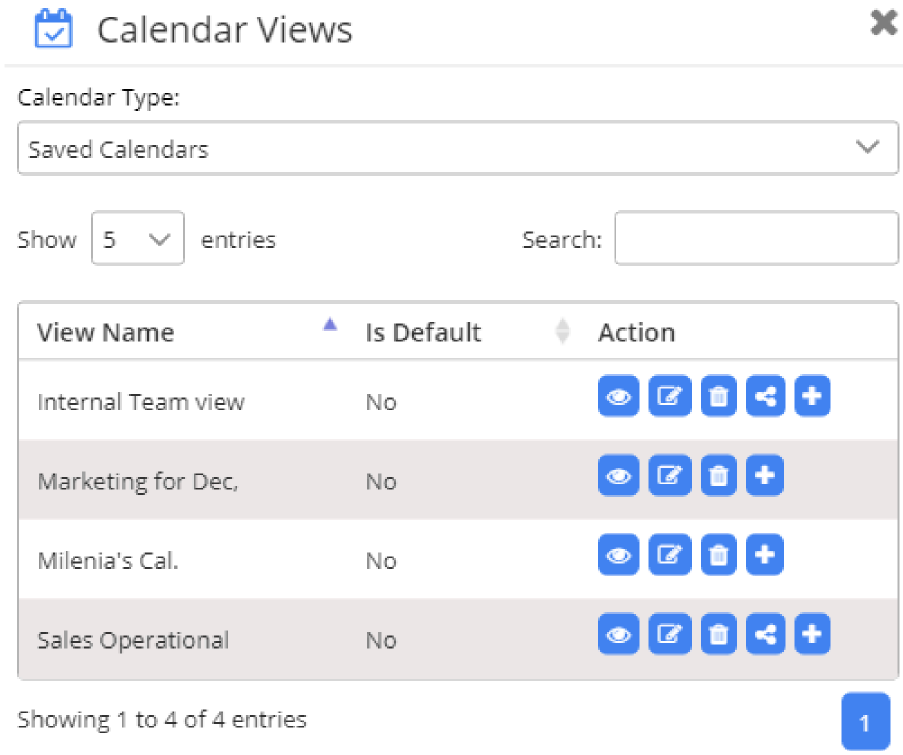


- You can see the list of **Saved Calendars** from the drop-down list of Calendar name.
- By click on any saved Calendar name, you can check that Calendar view.

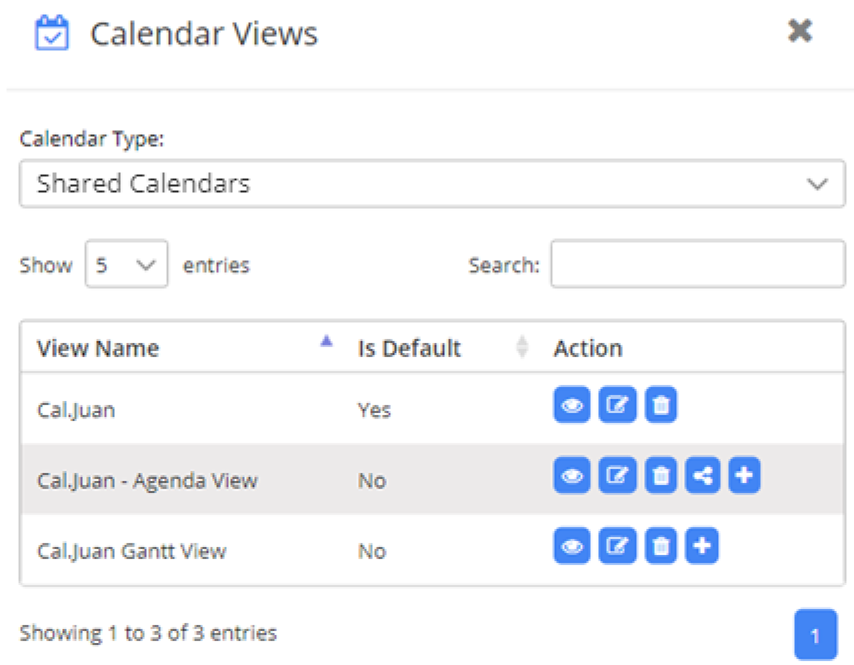
View Saved Calendar list



- Users can access saved calendar views by clicking on right icon that indicates the **View Calendars**.
- After you click on that icon, a dialog box opens with dropdown named “Calendar Views” to check and edit the Calendars from the list.
- Under the Calendar type, the user can check the ‘Saved Calendars’ and ‘Shared Calendars’ by other users/teams.
- ‘Saved calendars’ are the one which you have created and saved while ‘shared calendars’ are the one that are shared with you by other users or the calendars that are made public by other users.
- Based on Calendar Type selection, you get list of calendars.



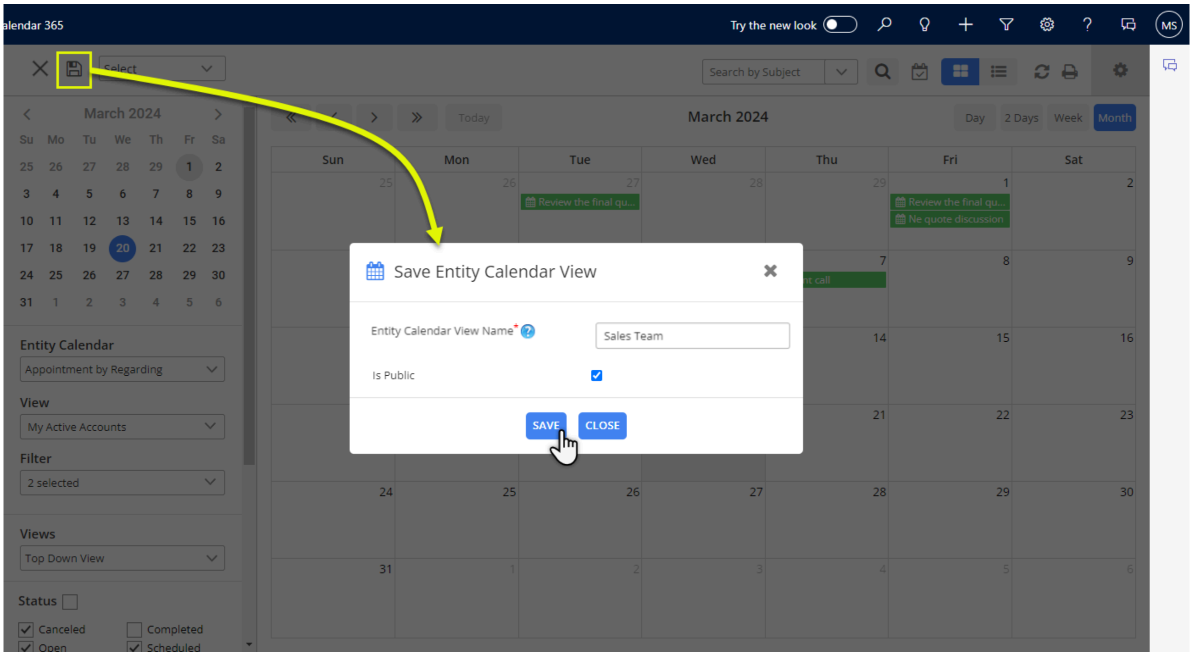
- From the Saved Calendars list, you can see the View name with their actions. You can select a default calendar by pressing **+** icon.



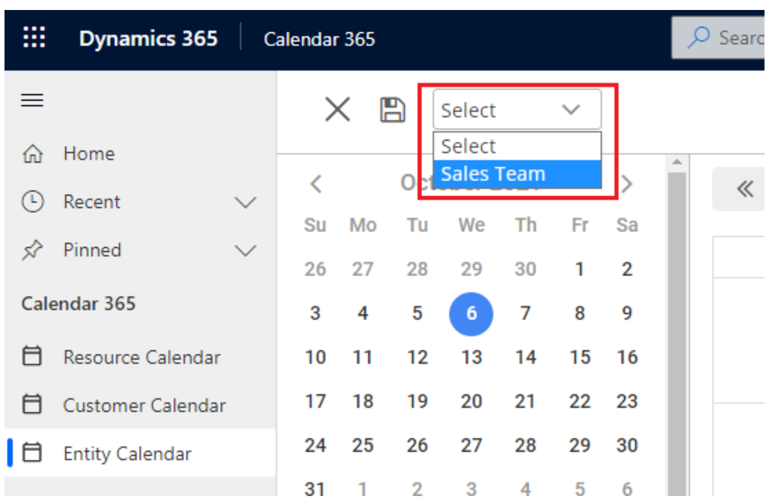
- For saved calendar and being the owner of that calendar, you can View, Edit, Delete and Share calendar. ‘Share’ option is available only when calendar is private (should not select as ‘Is Public’).
- Also, different actions are available only when you are the owner of the calendar, else it just shows the preview icon.
- Clicking on edit calendar, particular saved calendar opens so as to edit it as required and along with that shows update calendar view icon to update calendar.

Save Calendar View for Entity Calendar

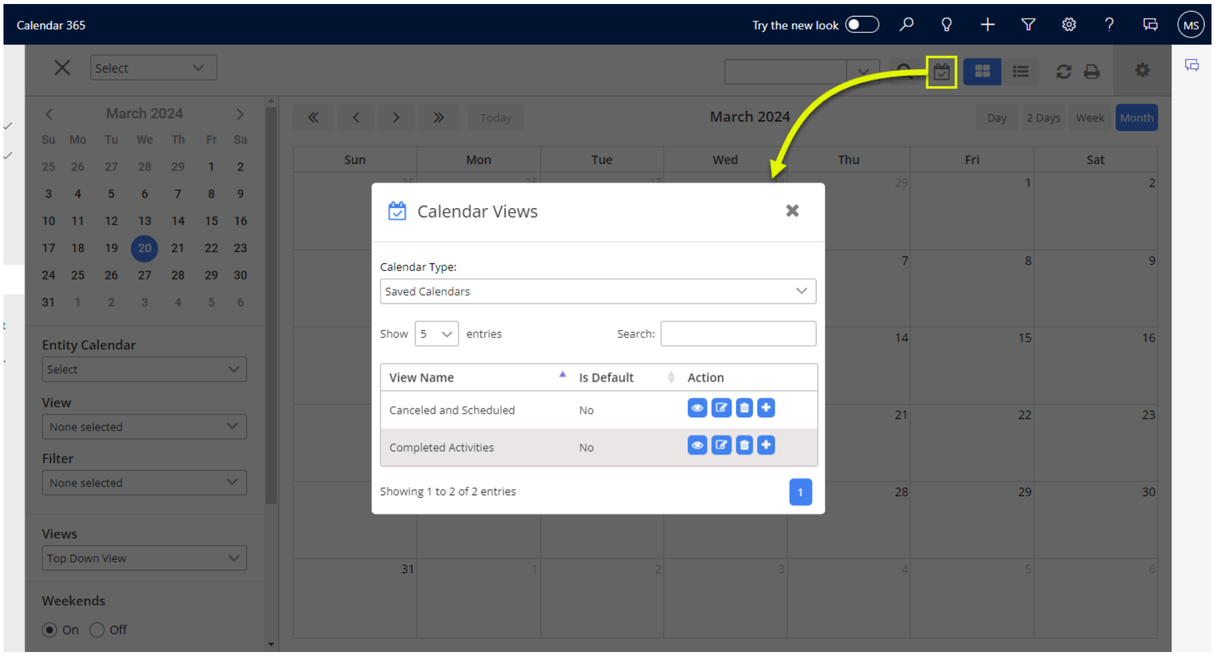
- Similarly, you can save the **Entity Calendar**. By clicking on the ‘Save’ icon, you will get the popup to insert the calendar name. You can decide whether you want to share with others or keep it private only for your use.



- Click on the **Save** button to save the Entity Calendar. You will get the drop-down list of the saved calendar.

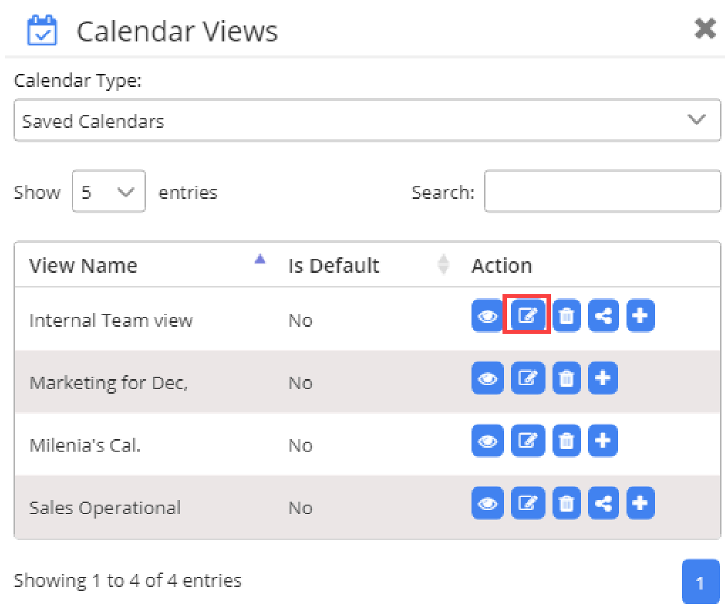


- You and CRM users can access the saved calendar views by clicking on the ‘right’ ☑ icon that indicates the **View Calendars**.

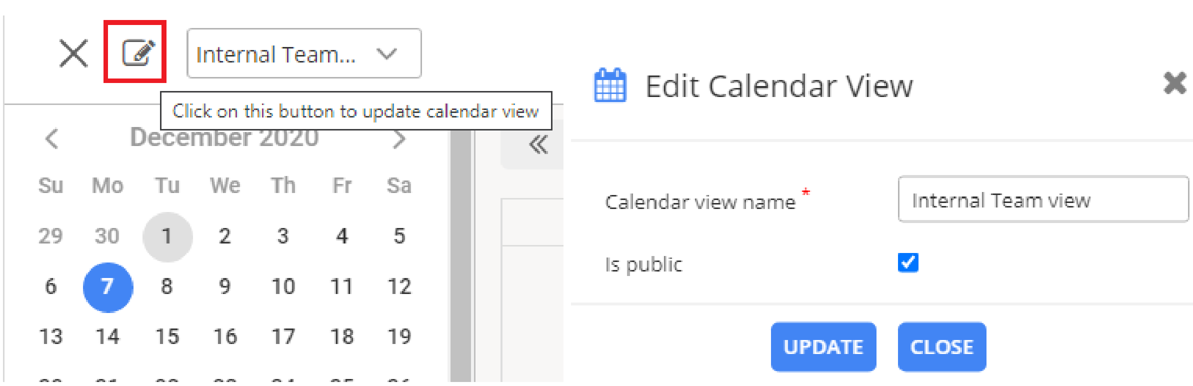


- You can manage and perform the required action like view, edit, delete, and make a default for the saved entity calendar.

Edit & Update Calendar



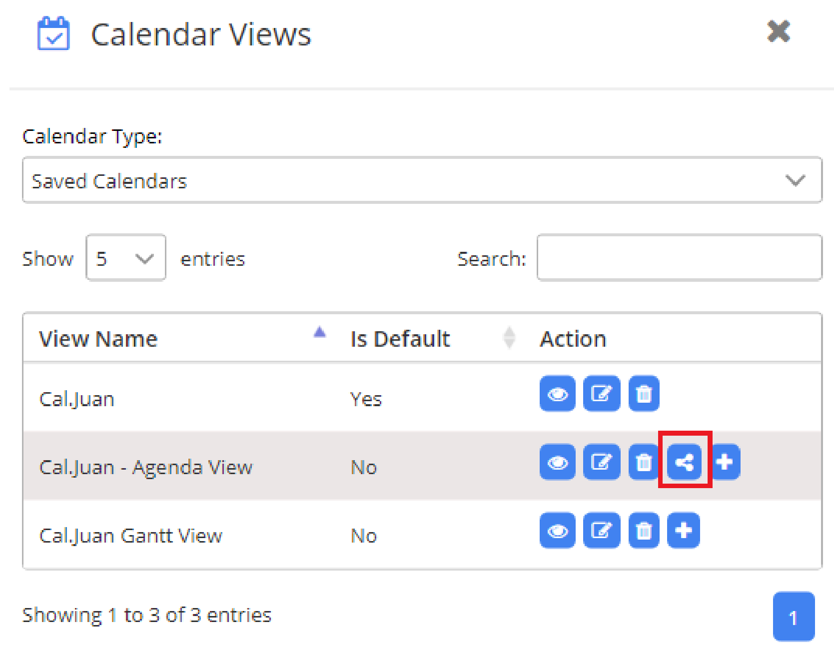
- On clicking 'edit' icon, you get to update calendar name and select if calendar is public or private.



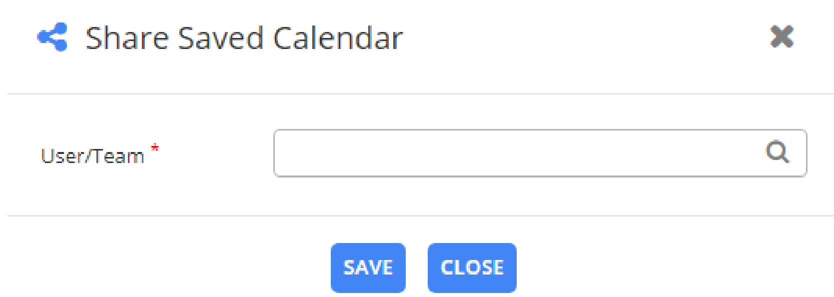
- Click on **Update** button to update the changes made in calendar.

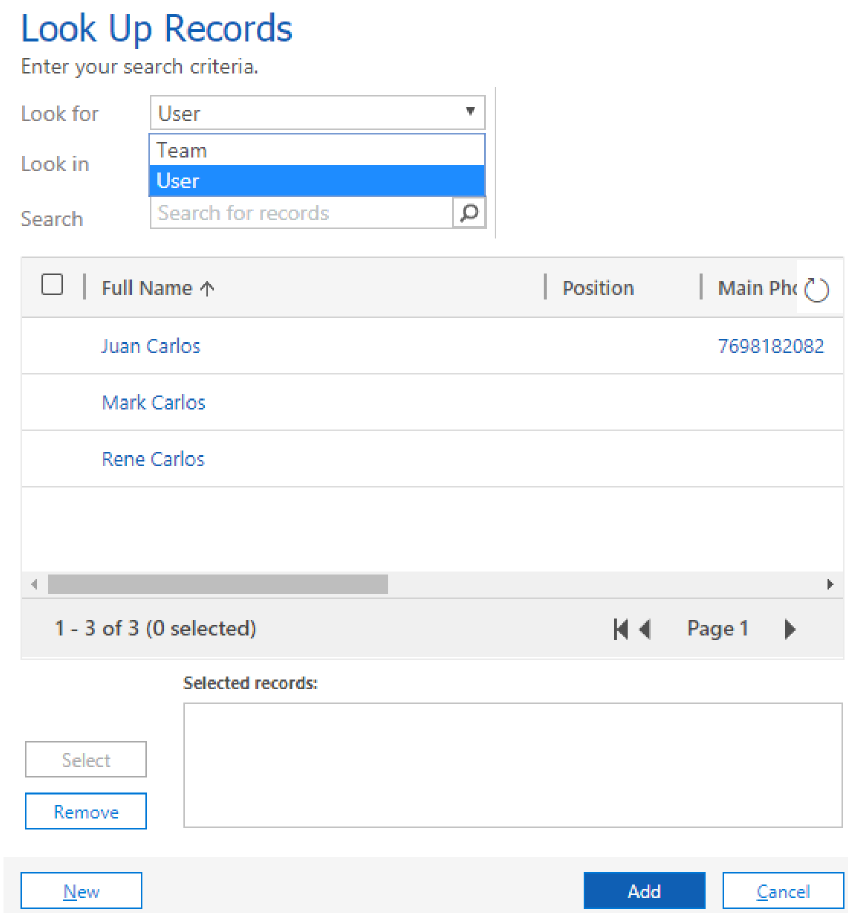
Share 'Saved Calendar' Views

- Clicking on shared icon, you can share Calendar with other CRM users or team.

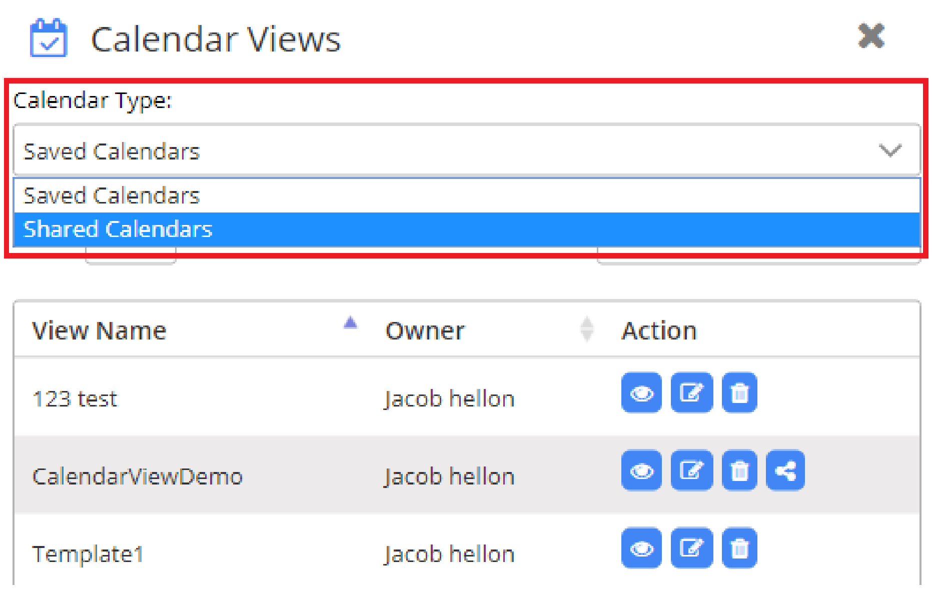


- Clicking on 'Share' icon, opens a dialog box to select the user or team from the look up records box. After selecting the user, click on Save button to complete the calendar sharing. You can select multiple users and teams to share calendar with.





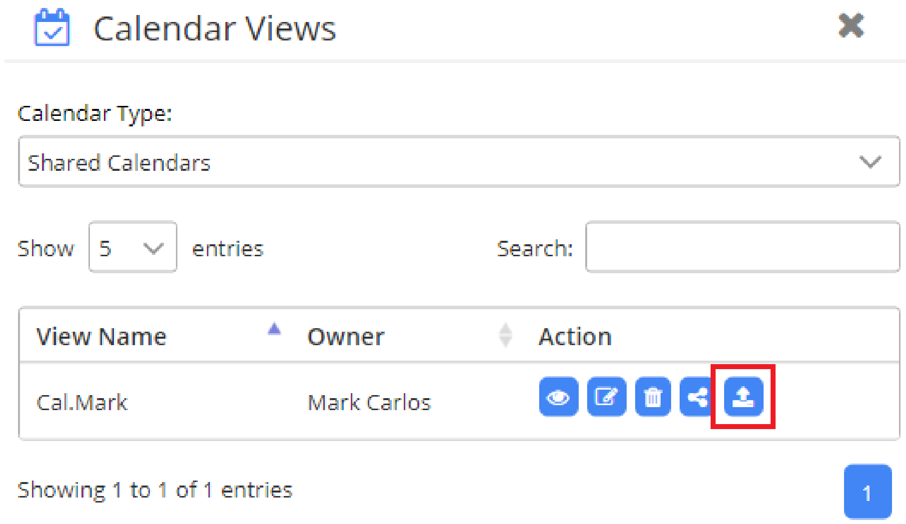
- You can select the Users/team with whom you want to share the Saved Calendar view.
- A Calendar view shared by others can be seen by selecting 'Shared Calendars' option.



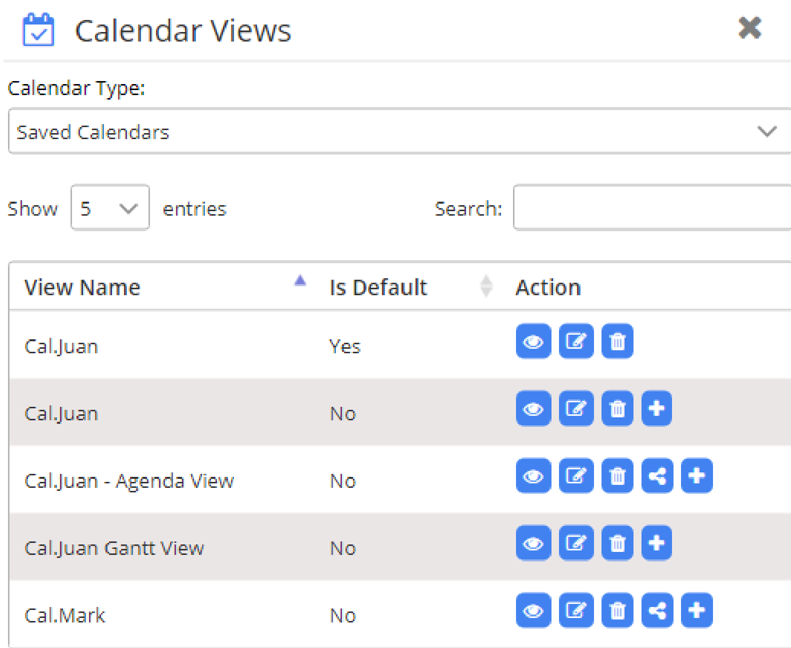
- When the saved calendar is previewed, it enables a button to go back to the current view (previous view).

Move Shared Calendar to Saved Calendar

- You can move the 'shared calendar' to the 'Saved Calendars' list by clicking on 'Move' icon.

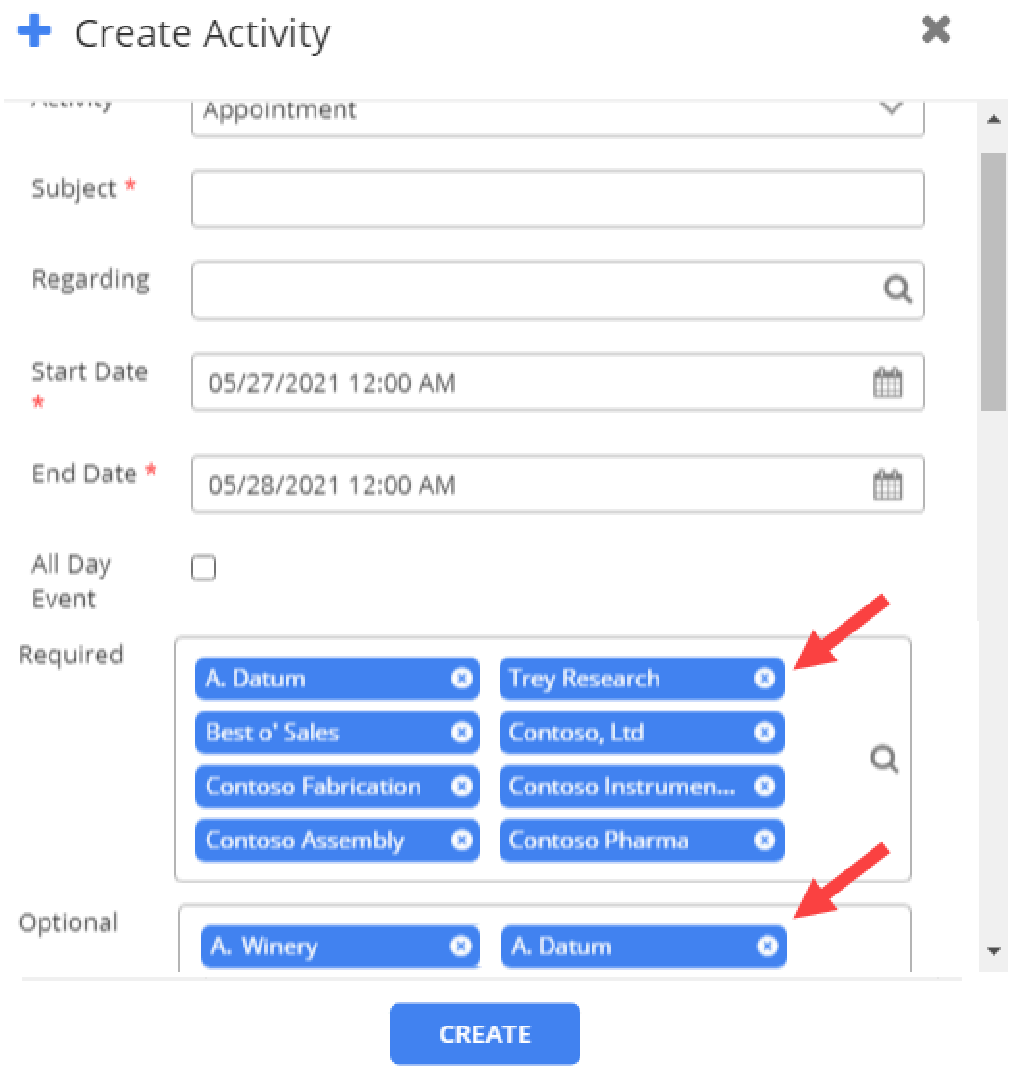


- Now you can see a shared calendar in the Saved Calendars list. You can make it default if you want.

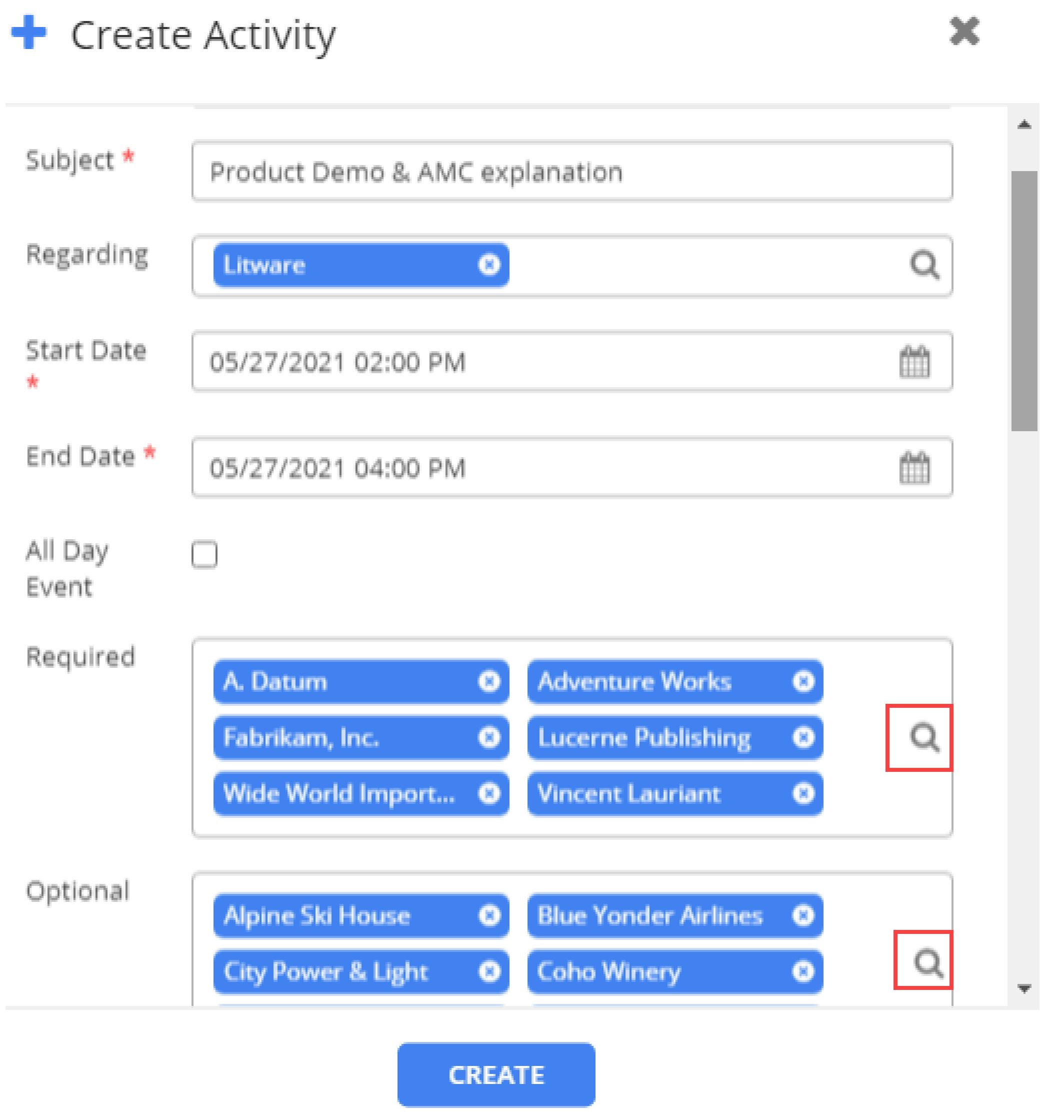


Share Appointment Activity

- You can also share the appointment with other users (team members) at the same time when you are creating an Appointment activity.
- You can pre-select CRM records to share the Appointment activity with them when appointment creates. You can select the **Required** & **Optional** records from the activity configuration under the Calendar Settings to share the Appointment activity.
- As you have selected the records, it will be pre-selected during the ‘Appointment’ activity creation.



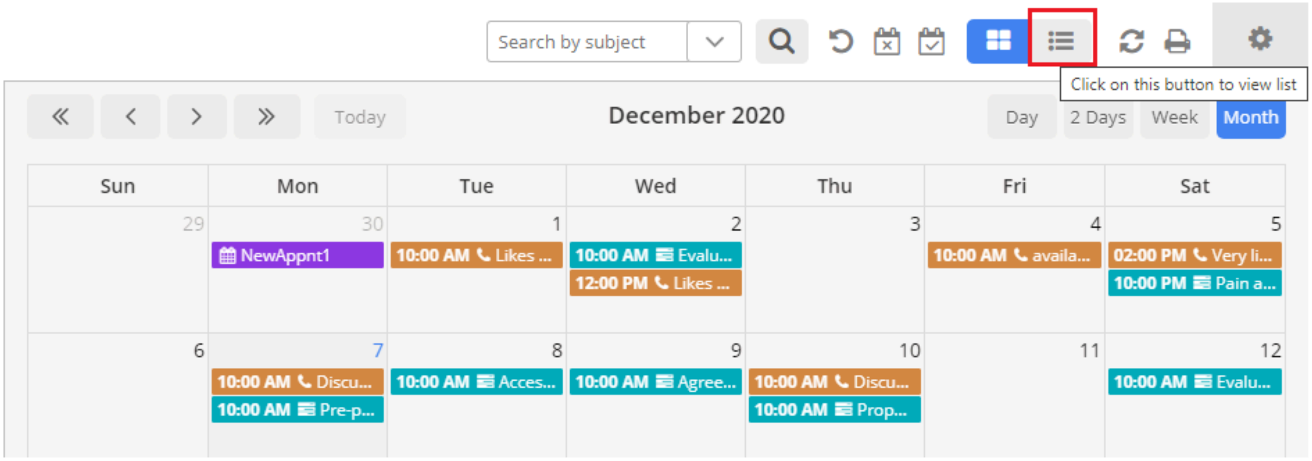
- You can remove the records from Required & Optional as per your requirement if you do not want to share the appointment with some of the selected records.
- You can add more records into Required & Optional by clicking on the Search icon. You will get the Lookup Records popup from there you can select other records as per your requirement.



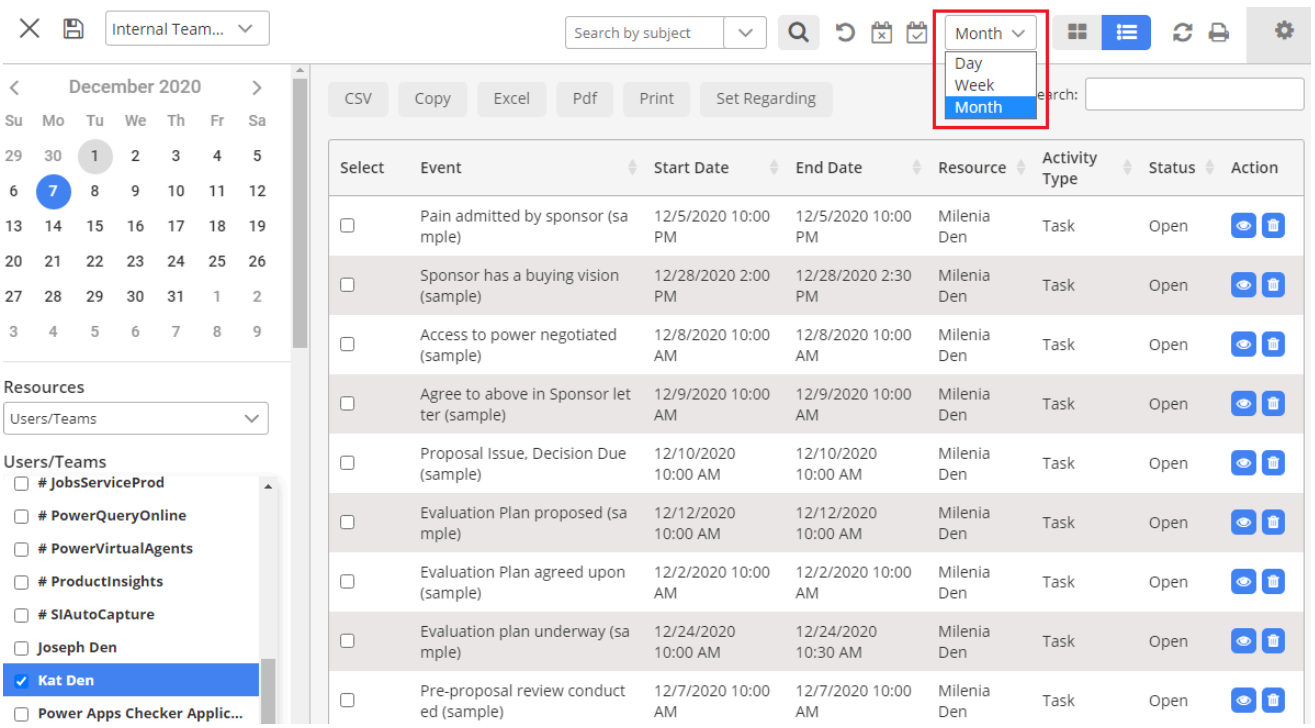
- Once the appointment is created, the other user will also get the appointment in their calendar.
- If you have enabled the **Email** option from the Calendar configuration, the Email will be sent to the Required and Optional attendees that are selected.

Activity Grid View of Calendar

- To get list view of all activities, navigate to 'list' button on the calendar and along with that select time span from Day, Month or Year from the dropdown.



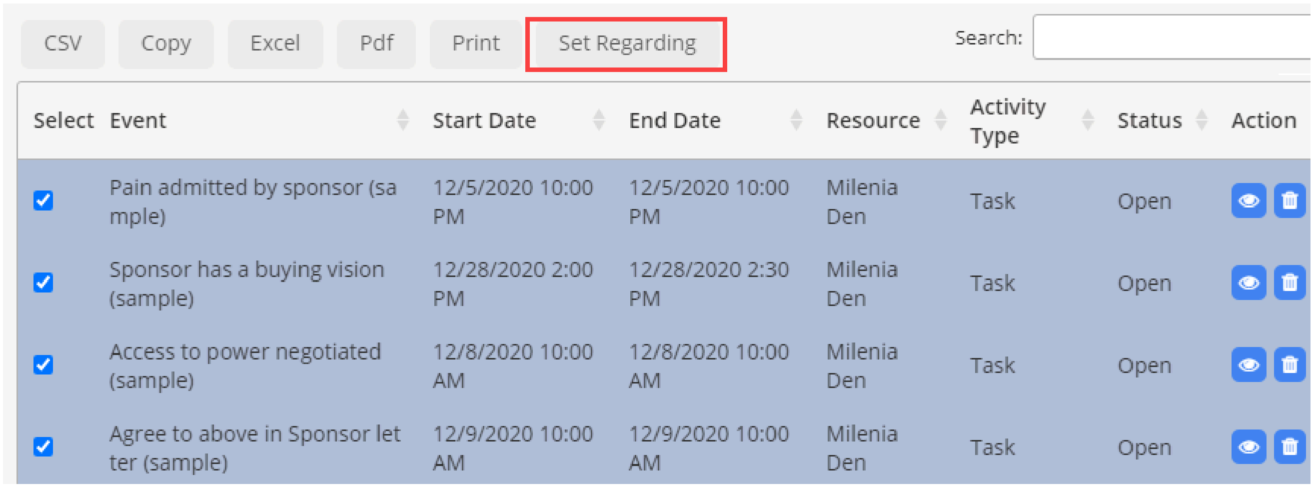
- By clicking on 'List' icon, the list of events will be displayed Day wise by default. You can change to Week or Month.



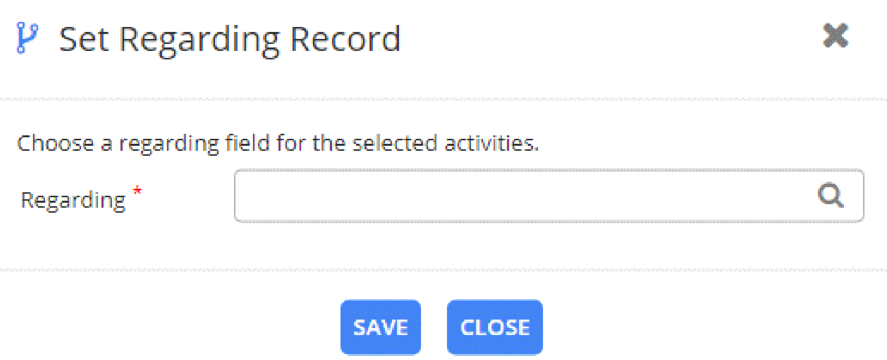
- List view works based on a small **calendar** available on left side of the calendar view. You will get the list of events based on day/date selected in the smaller left side calendar.
- For **Day** span, it shows list of events that fall under the days that are selected.
- For **Week** time span, it shows list of events that fall under the week in which the selected day is part of.
- For **Month** time span, it displays events of months to which the selected day is part of.
- From list view, you can perform multiple actions like:
  - Exporting records to CSV, Excel, PDF
  - Copying records,
  - Printing records and Set Regarding for the selected records.

Set Regarding under Grid View

- To set regarding for the records, select the records and click on **Set Regarding** button.



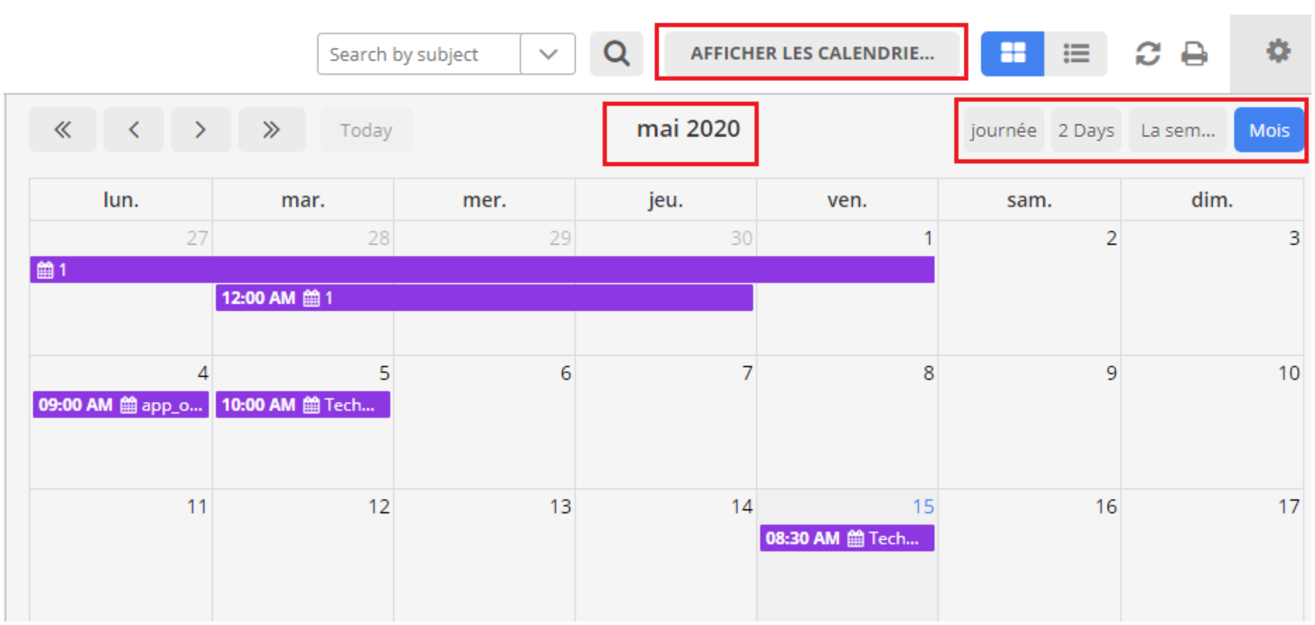
- This opens set regarding record dialog box to select record from the look up dialog box.



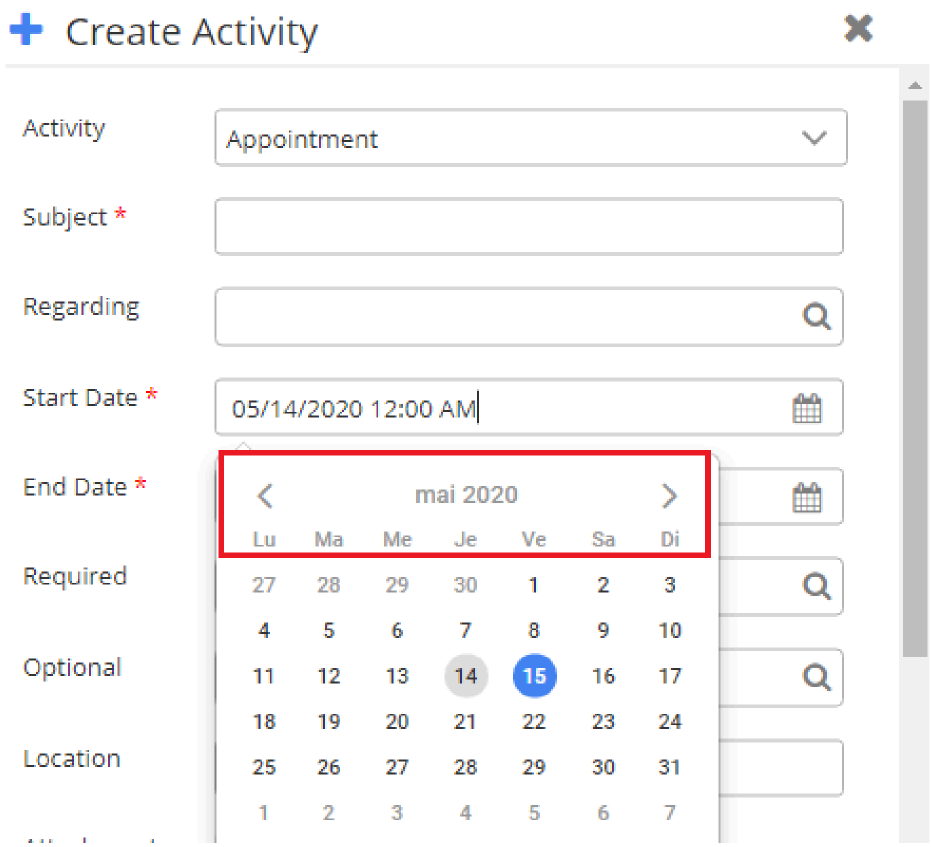
- After selecting click on 'Save' button to set regarding for the record. As you click on Save button, the popup message will be appeared to set regarding,

Multi-language Calendar Labels

- You can see the default CRM labels and Calendar365 captions in different languages based on the language settings in **Personalization Settings** from the CRM side and in the **Settings** from the Calendar365 side.

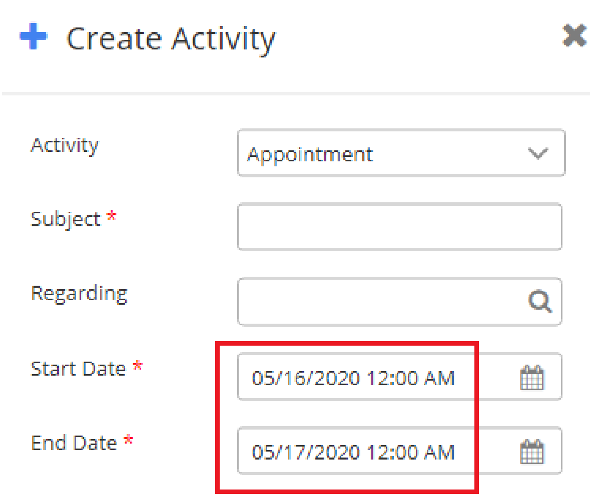


Note: To display the labels & captions in the same language, you must select the same language on the CRM side and Calendar365.

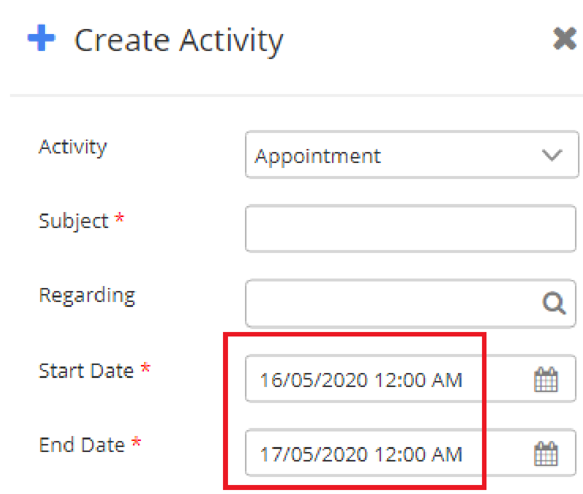


Dynamic Date formats

- You can manage the formats for **Date** from the Personalization Settings of the CRM.



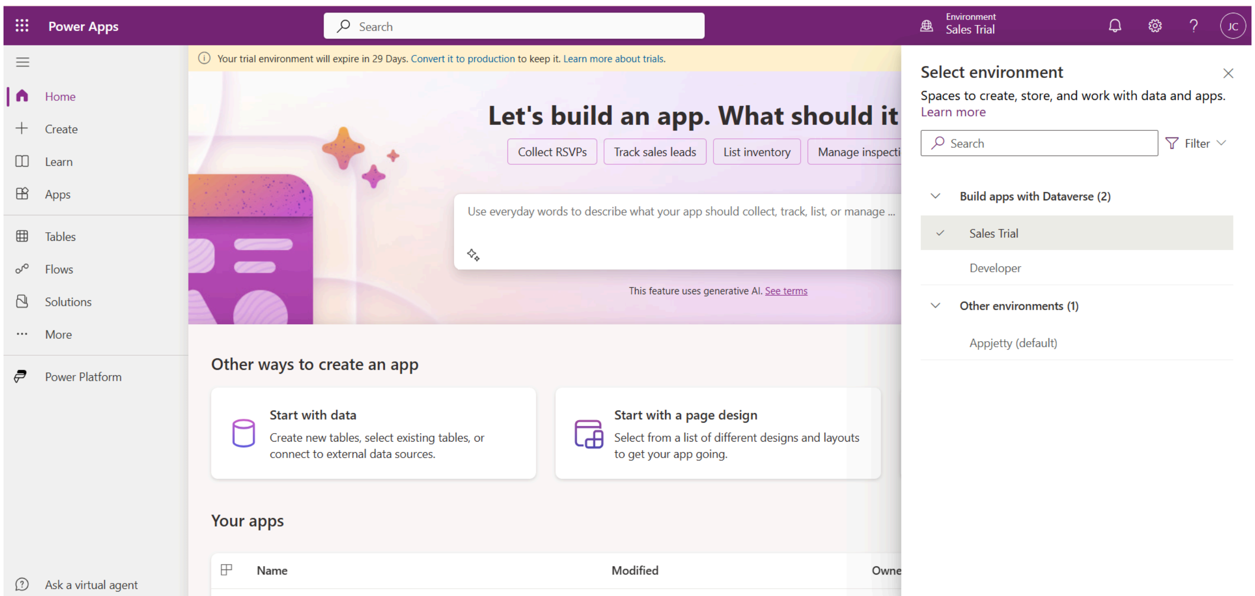
Format-1



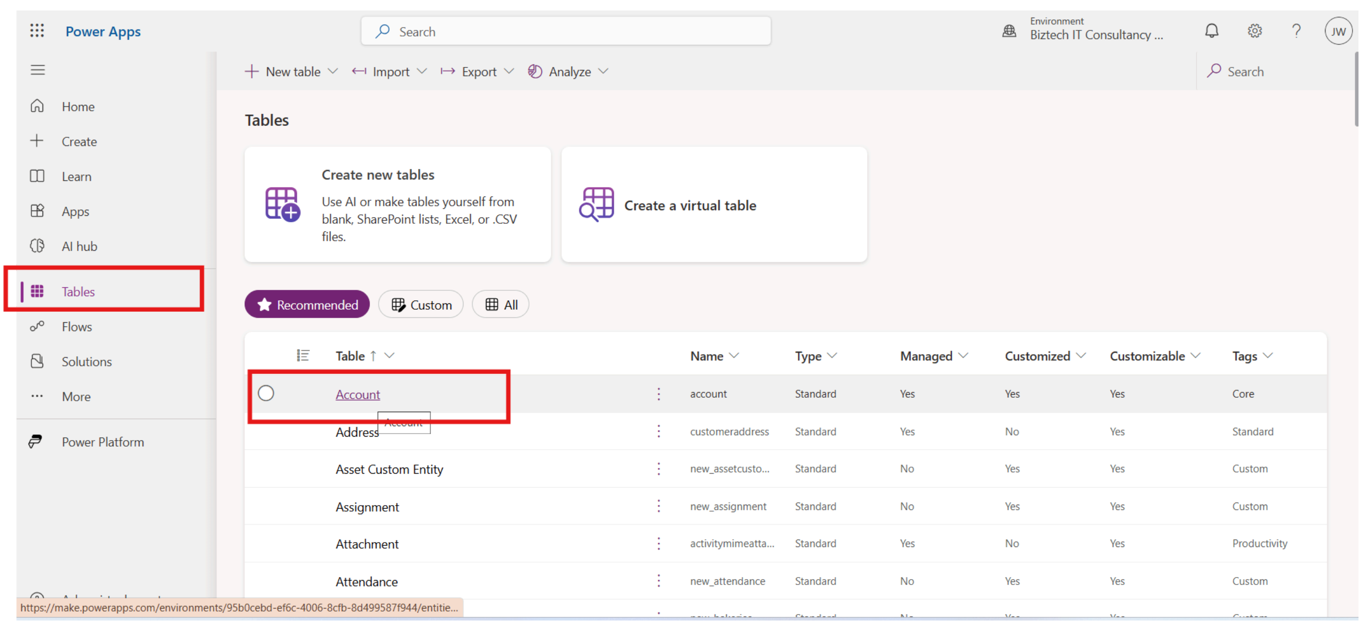
Format-2

Calendar inside entity record

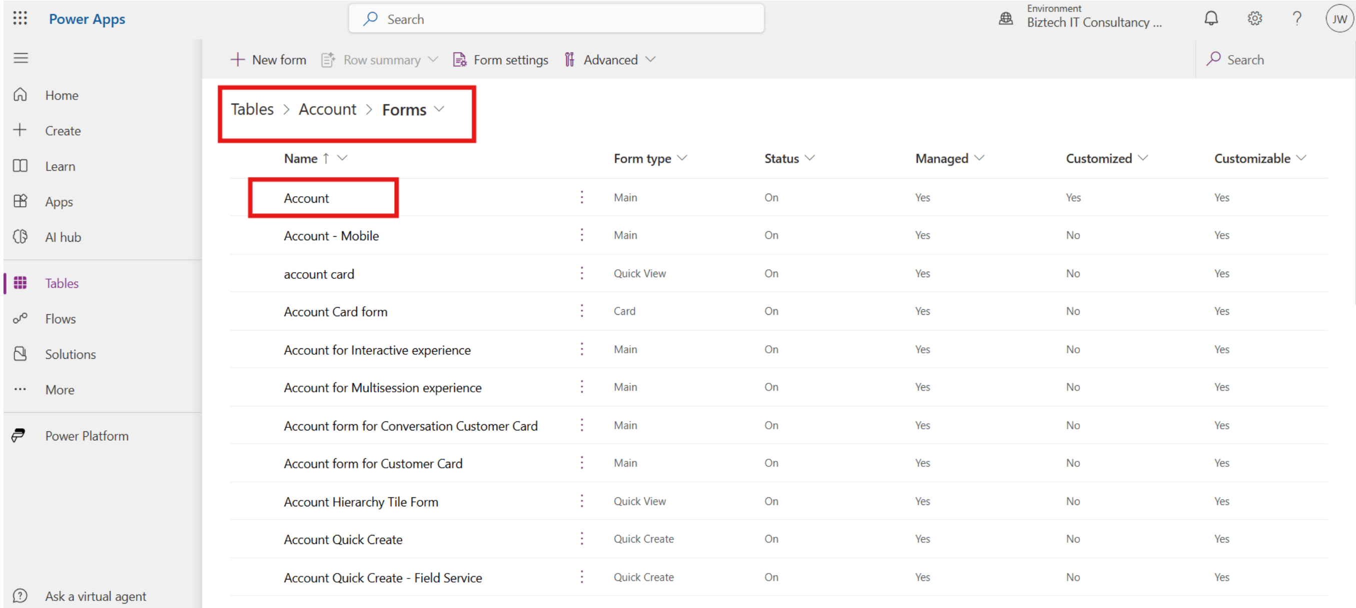
- You can enable the calendar of the Calendar 365 for an individual CRM entity record. You will get the activities on the calendar inside the specific entity record from the DynamicsCRM backend side.
- For that you need to configure the Form and the web resources for the entity. You need to follow the below steps to configure the calendar view inside the individual Entity record details:
    - Navigate to the https://make.powerapps.com
    - Select your environment



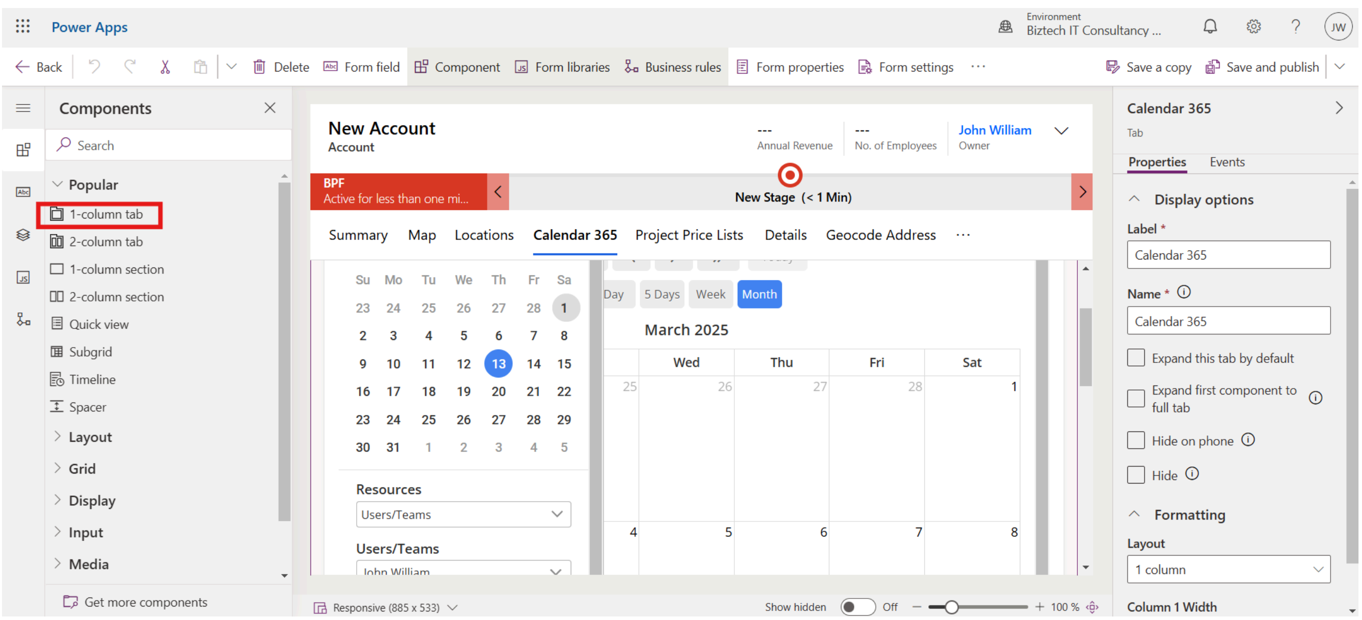
- Select the entity in which you want to add the calendar



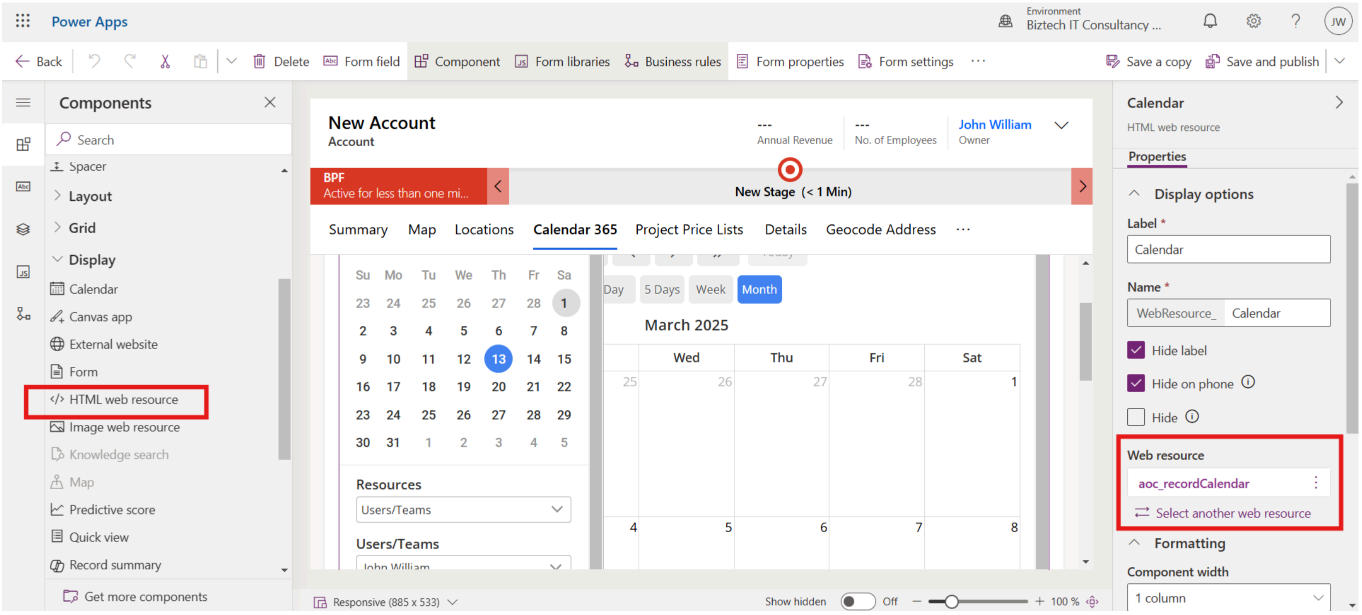
- Click on the Table (i.e. Account) ‘Forms’ to configure the record calendar.



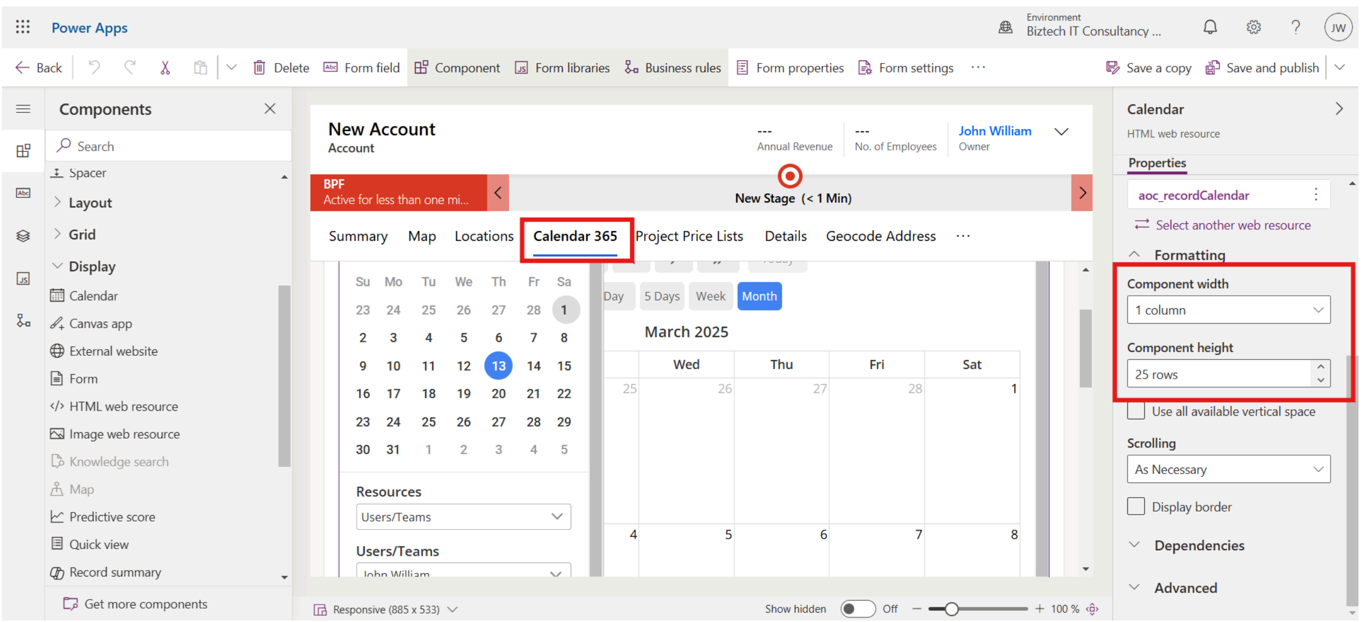
- Insert the Tab as per the layout that you want to be displayed. *i.e.* One Column. It will add a tab to the entity form.



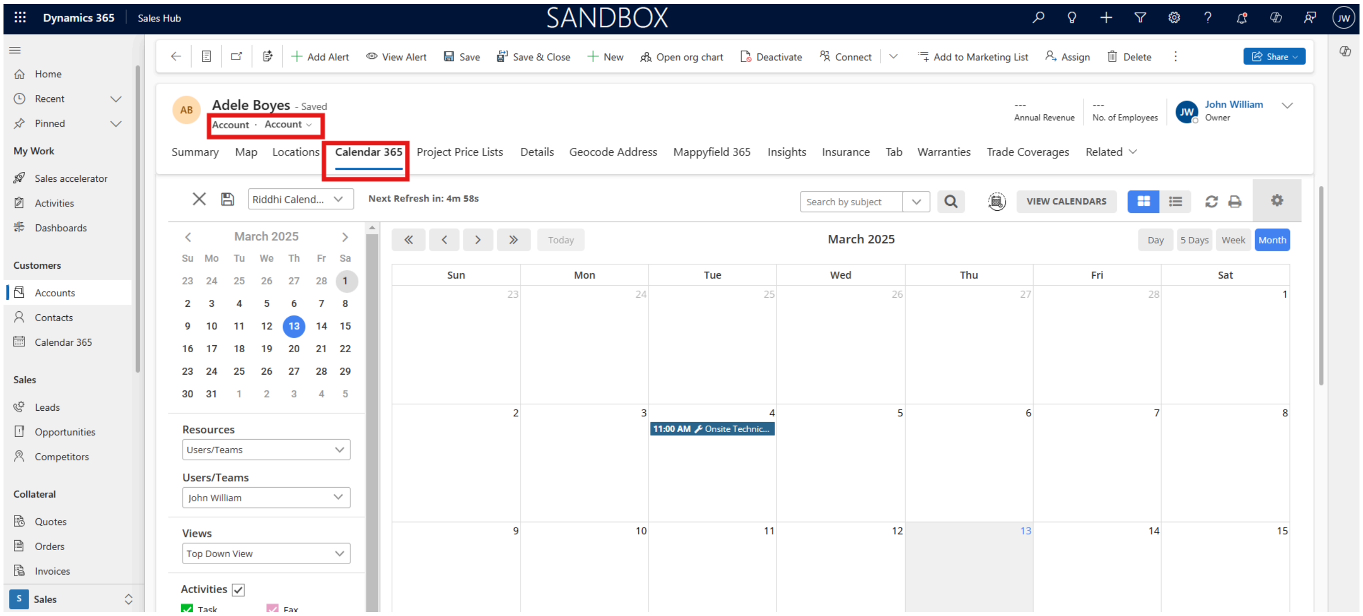
- Once the new tab is inserted in the entity form, add the HTML web resource named “aoc_recordCalendar”



- Insert the “Name” & “Label” for the form and press OK button.
- You need to select the Formatting for the Layout to adjust the calendar in the proper format.



- You need to select the Formatting for the Layout to adjust the calendar in the proper format. Press **OK** to save the properties.
- Now, navigate to the entity record (account entity), you will find the record calendar there.

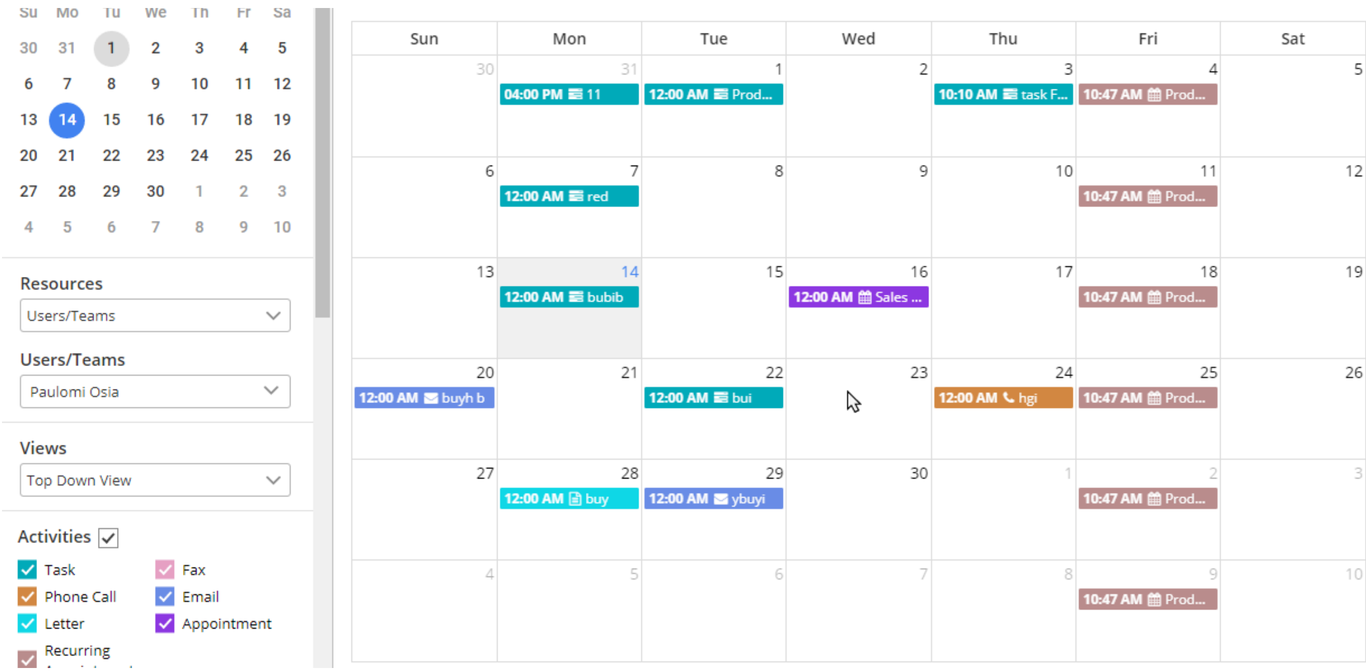


- You will get the new tab as you have configured. By clicking on it, you will get the record calendar. You can check the calendar activities for the individual records.

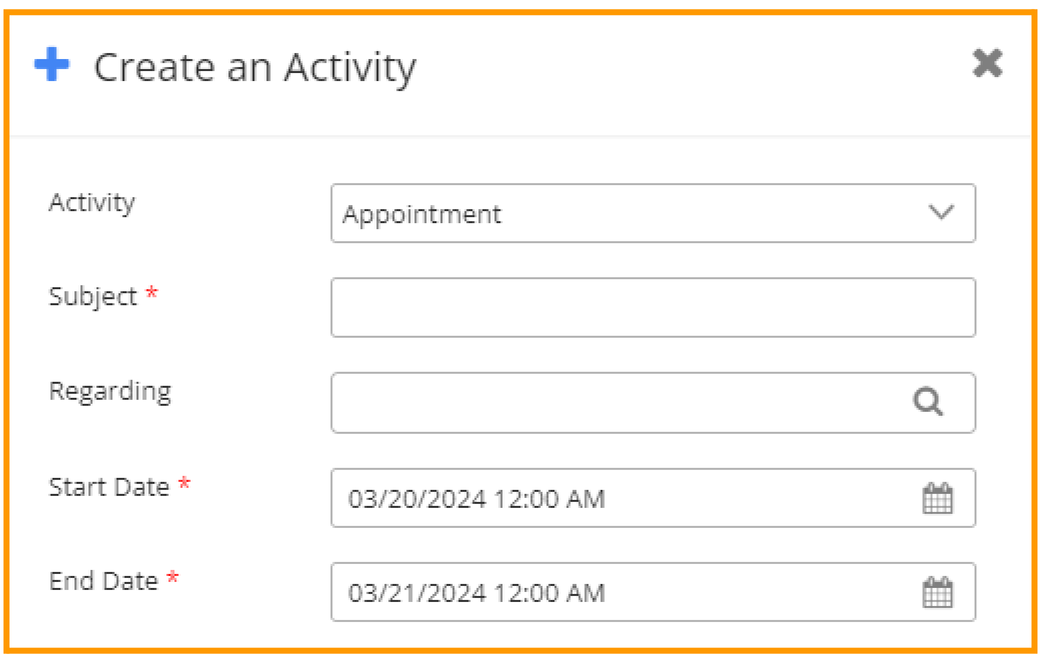
Calendar Activities

Create an Activity

- To create activities, click on the date on the calendar that you want to add the Activity to.

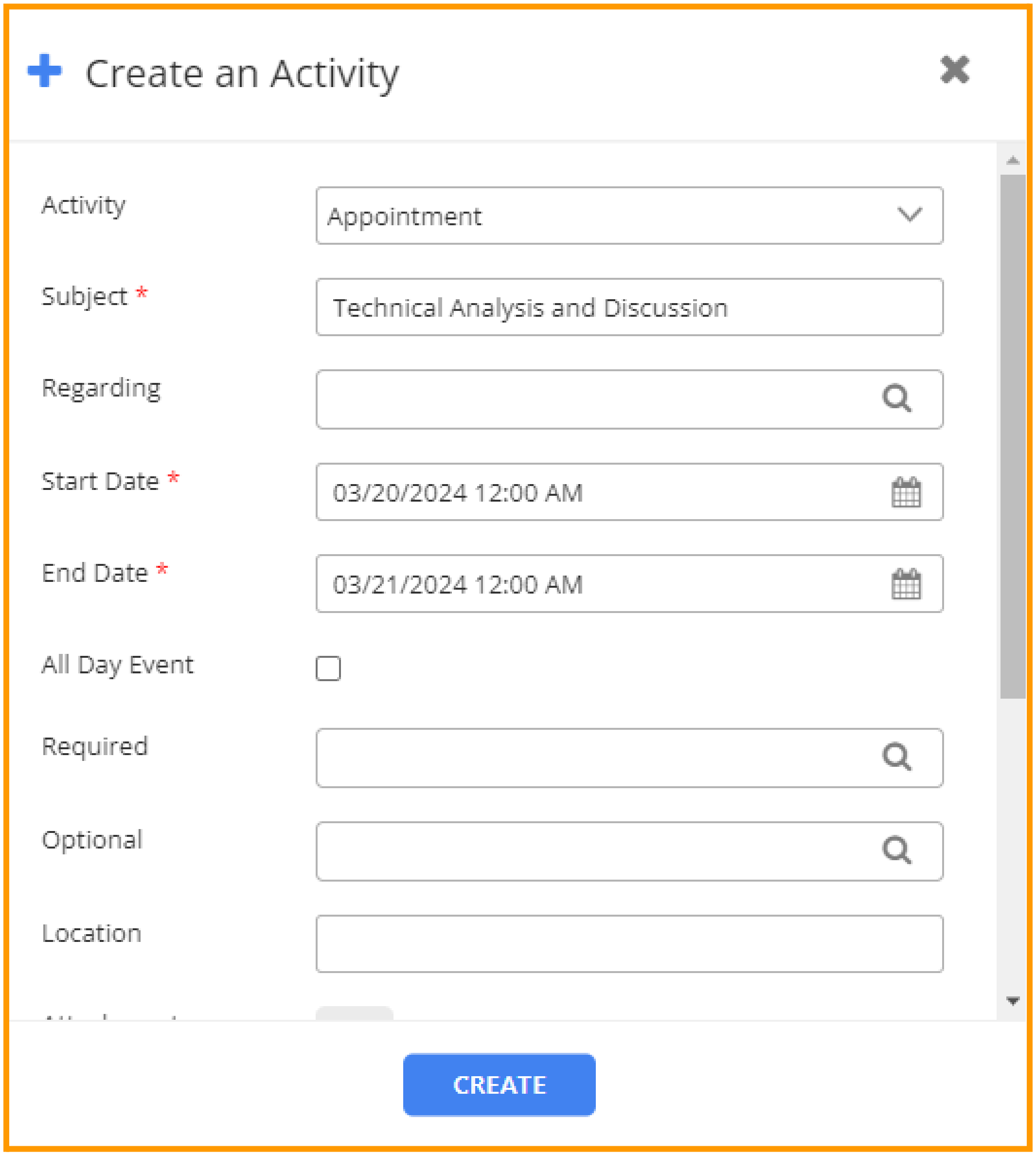


- As you click on the Date, **'Create Activity'** popup will appear on your screen :

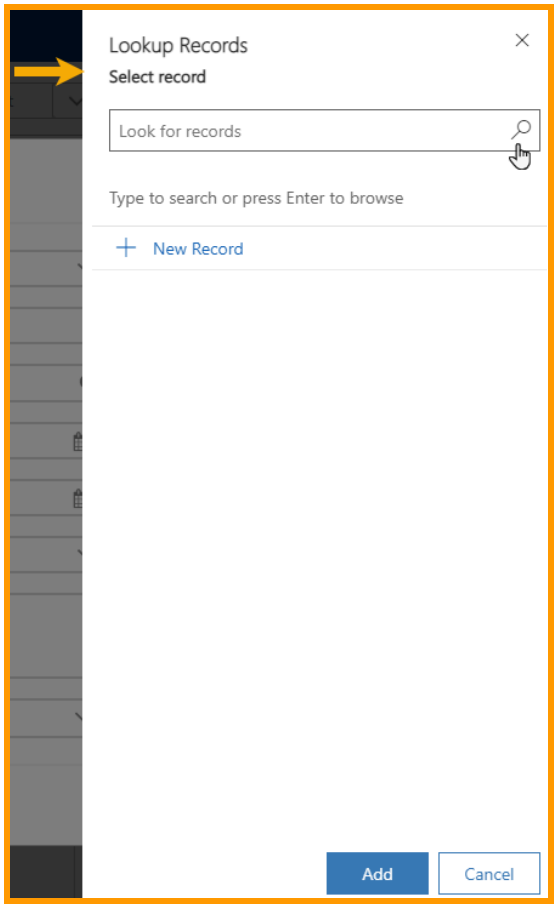


- You need to select the required activity from the list. You will get the list of the activities as enabled from the Calendar Configuration.

  - **Activity:** Select the type of activity you want to create.
  - **Subject:** Enter the subject of the activity.
  - **Regarding:** Mention the Account, Contact, or any other record with which activity is concerned.

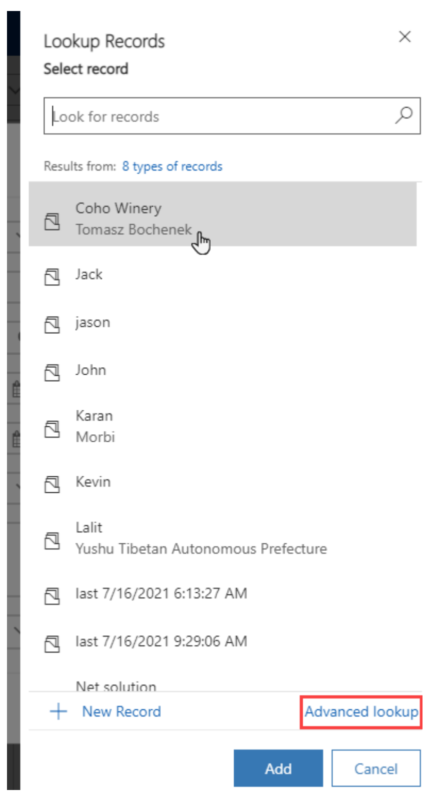


- Clicking on ‘search’ icon (magnifying glass) for the ‘Regarding’ text area, “Lookup Record” side window opens from where the user can select the record for activity.

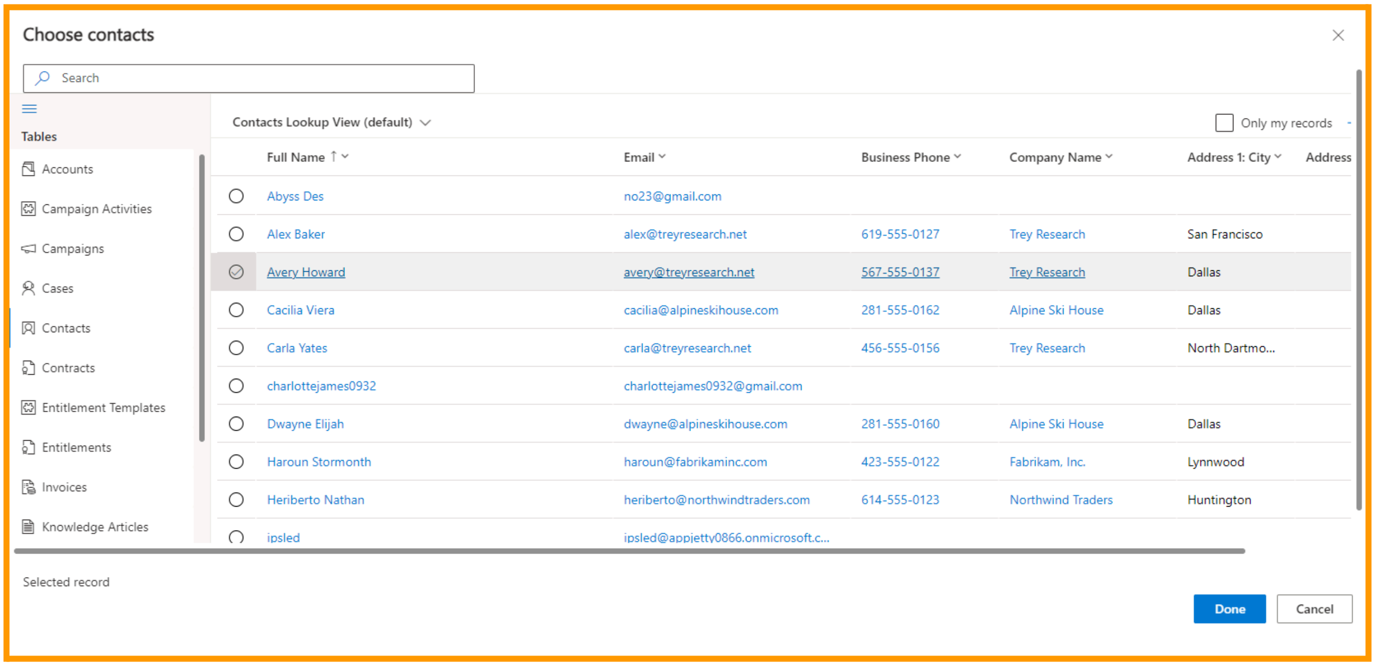


- You need to click on the 'search' icon of the Lookup Record to get the CRM records.

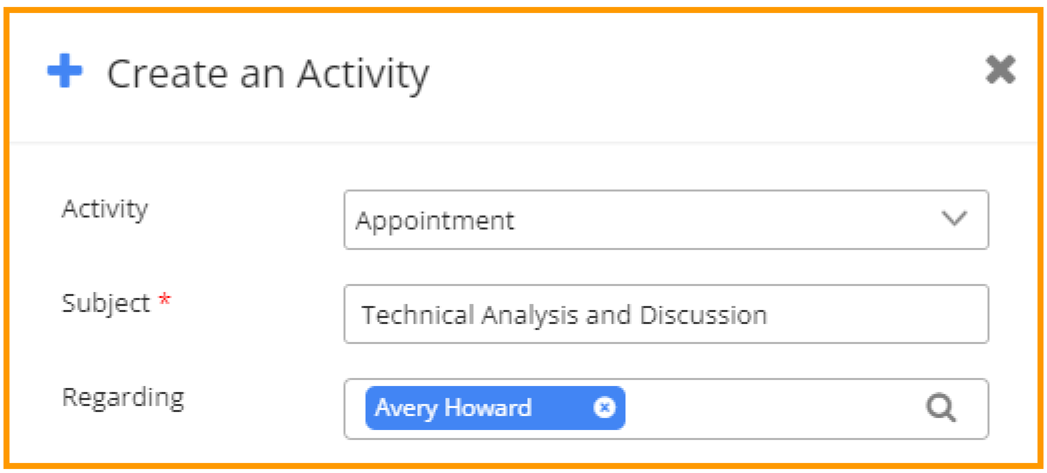
- You will get the list of CRM records as 'Results'. You can select the required records.

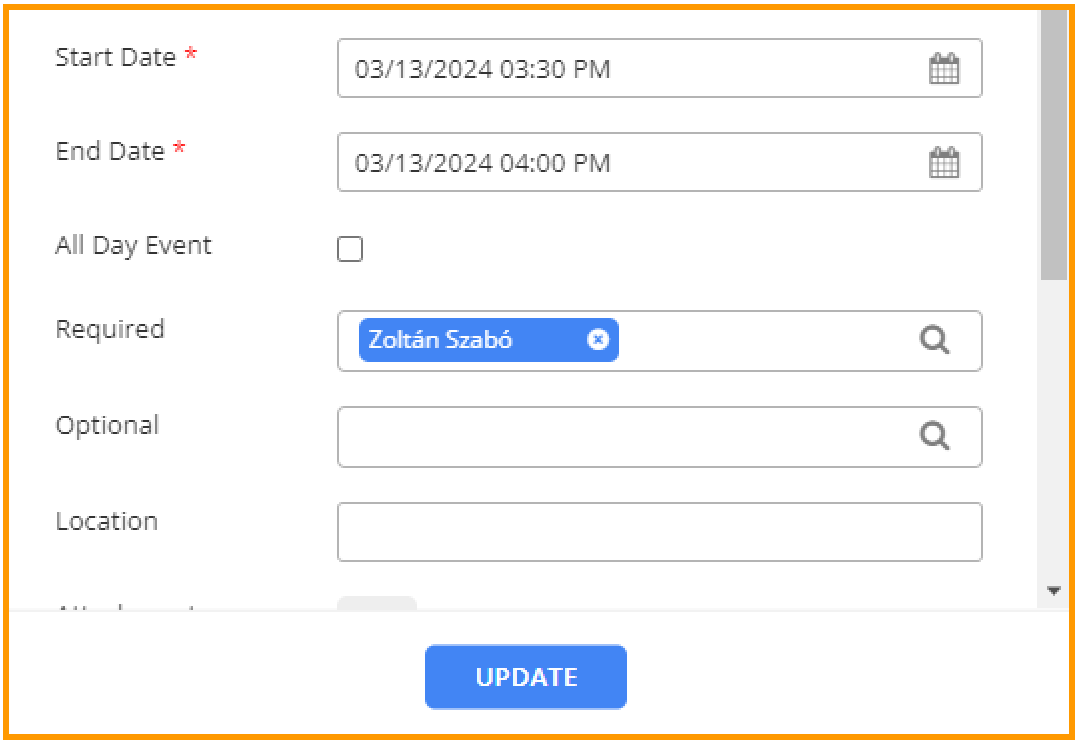


- If you want to expand the Lookup Records option to search other records, click on the **Advances lookup** option.

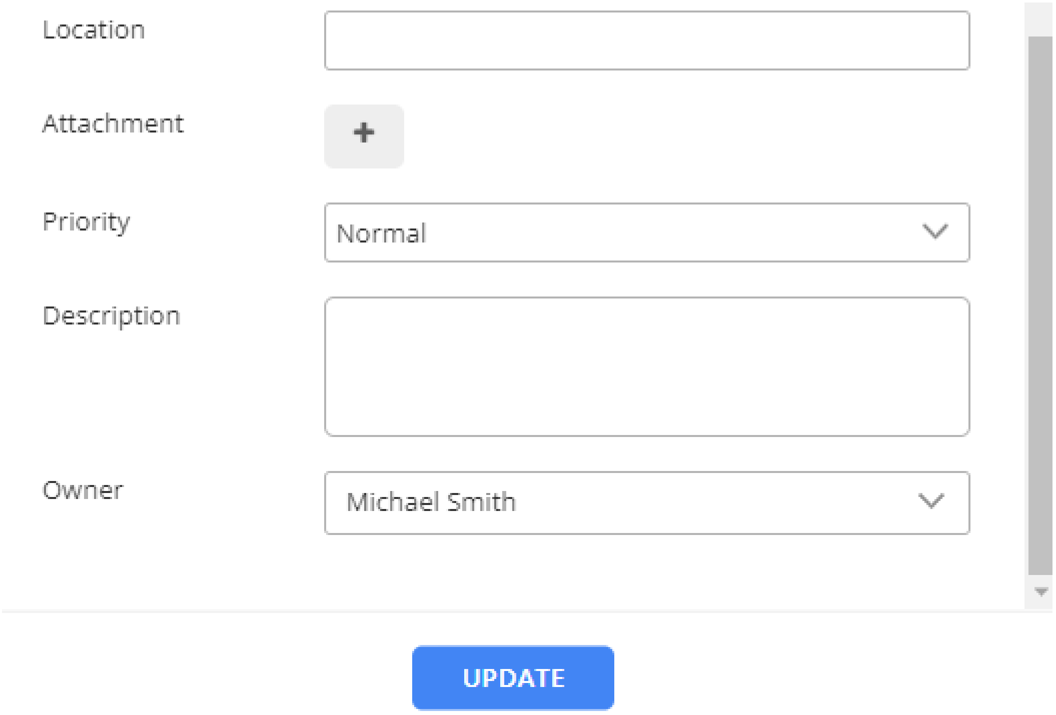


- Select any Account, Contact or any other record which is required in Activity. After selecting from the list, click on **Add** button. The selected record will be displayed on the 'Regarding' text field.
    - Selected records can be seen in the Regarding edit box.



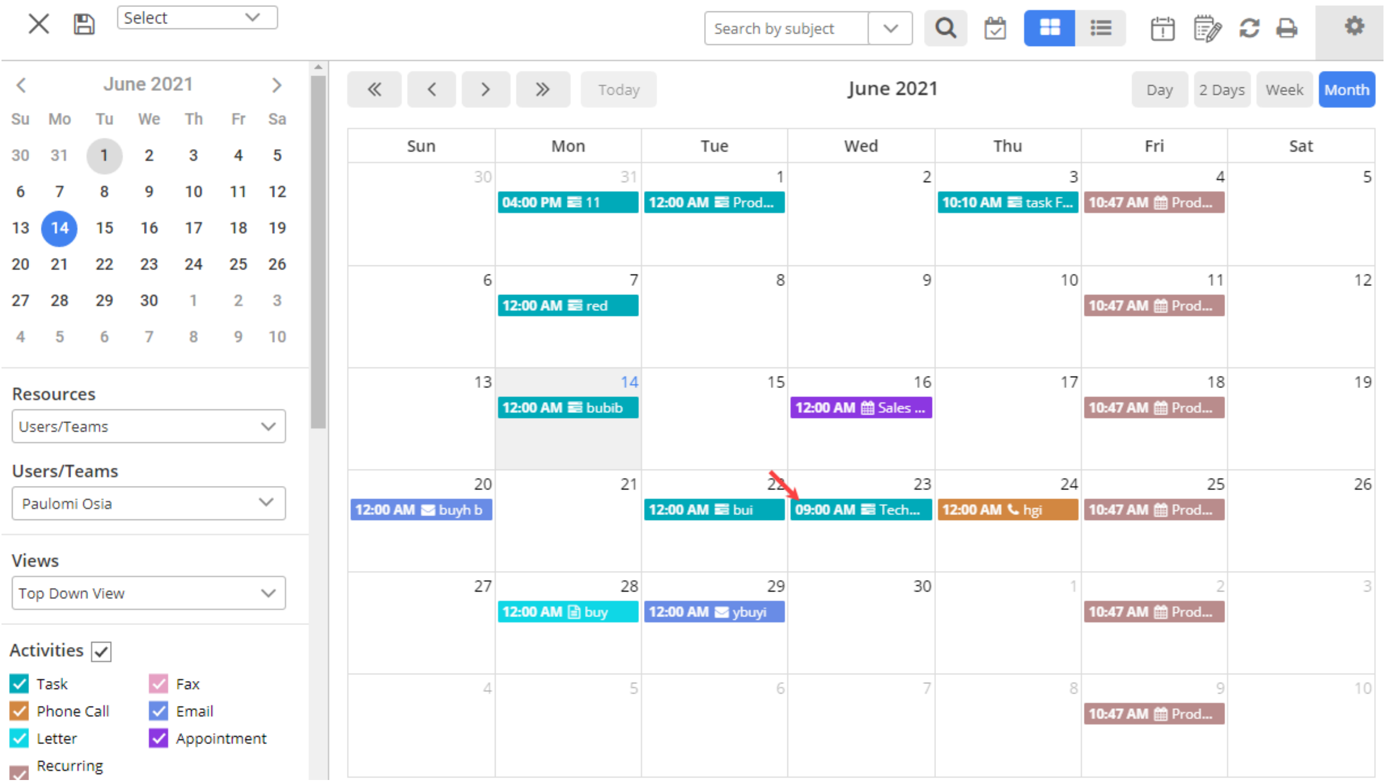


- **Start Time:** Set the Start Date and Time of the activity.
- **End Time:** Set the End Date and Time of the activity.
- **All Day Event:** Every “all day” appointment will be seen at the top of day/week/ day view in the All day slot.
- **Required:** Add the members who are required for the particular activity.
- **Optional:** Add those who are not required but can attend the activity.
- **Location:** Enter the location.



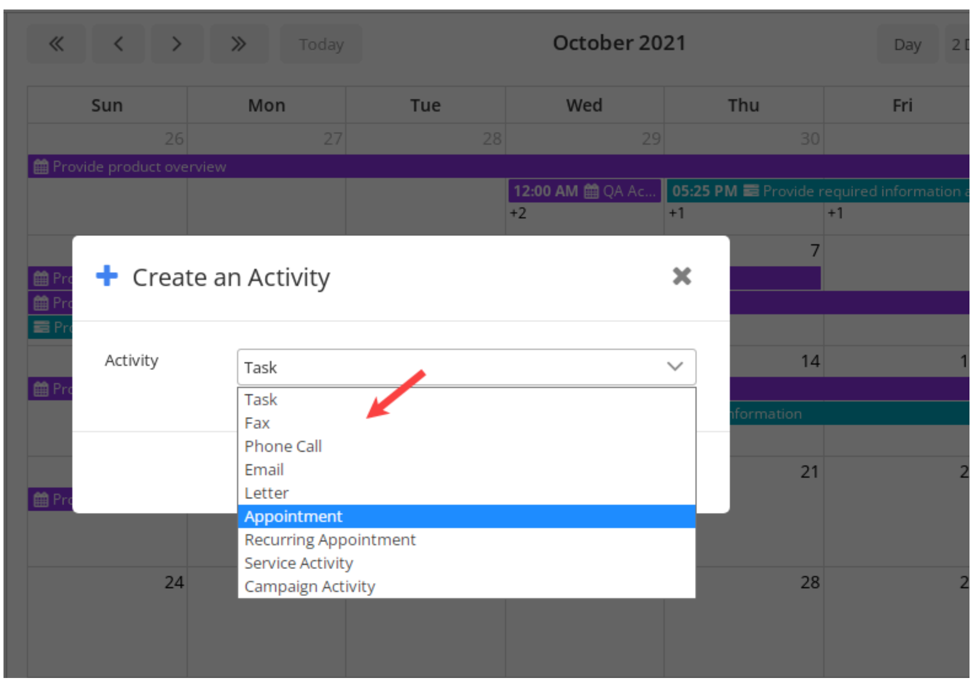
- **Attachments:** Add attachments from here.
- **Priority:** Set the priority of the activity. Priority can be High, Normal, or Low.
- **Description:** Enter the description of the activity.
- **Owner:** Displays name of the owner who created the activity.

- After clicking on the **Create** button, if there is no error, a confirmation message will be highlighted on your screen.
- Now you can view the added activity in your calendar.

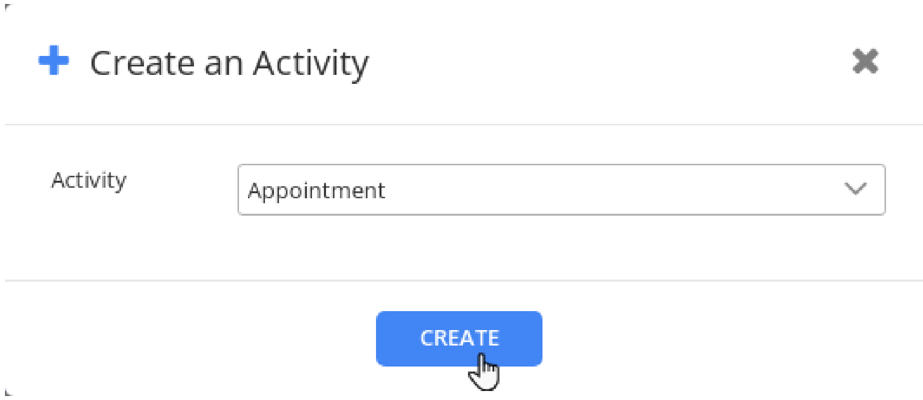


Quick Create Activity (CRM Form)

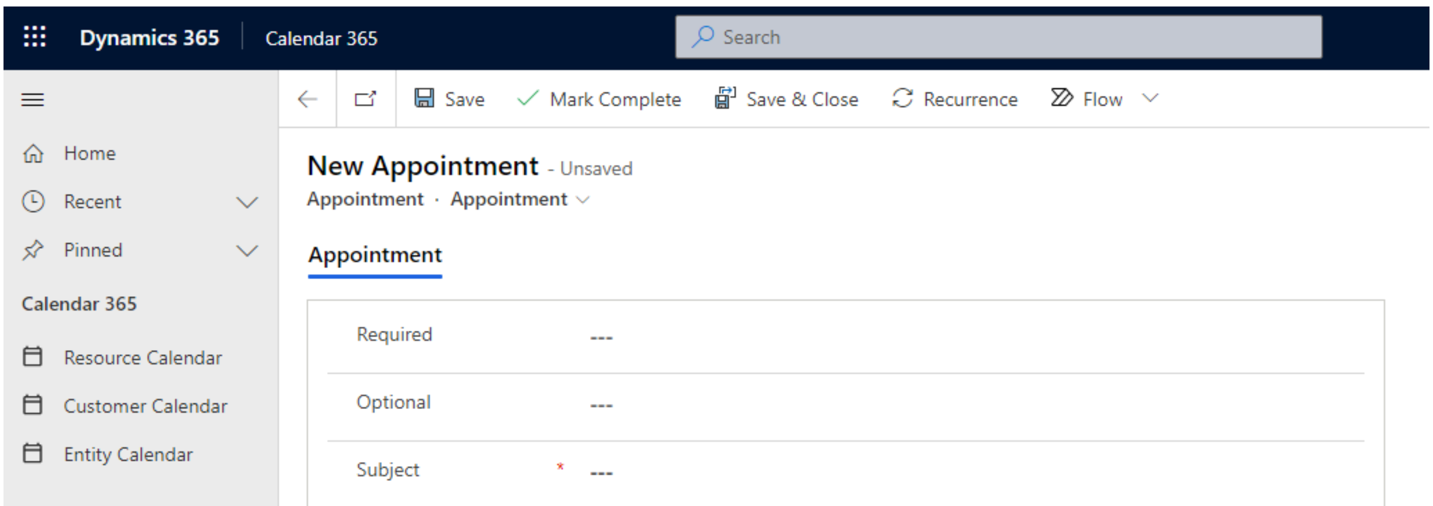
- If you have enabled the **Quick Create Form** option from "Calendar Configuration Advance Settings", you will get the CRM backend view (CRM Form view) to create the activity.



- You will get a drop-down list of the activities that are enabled. Select the activity and click on the **CREATE** button.



- After clicking on the **"CREATE"** button, you will be navigated to the CRM backend view (CRM Form) where you have to insert and select the details to add a new activity.

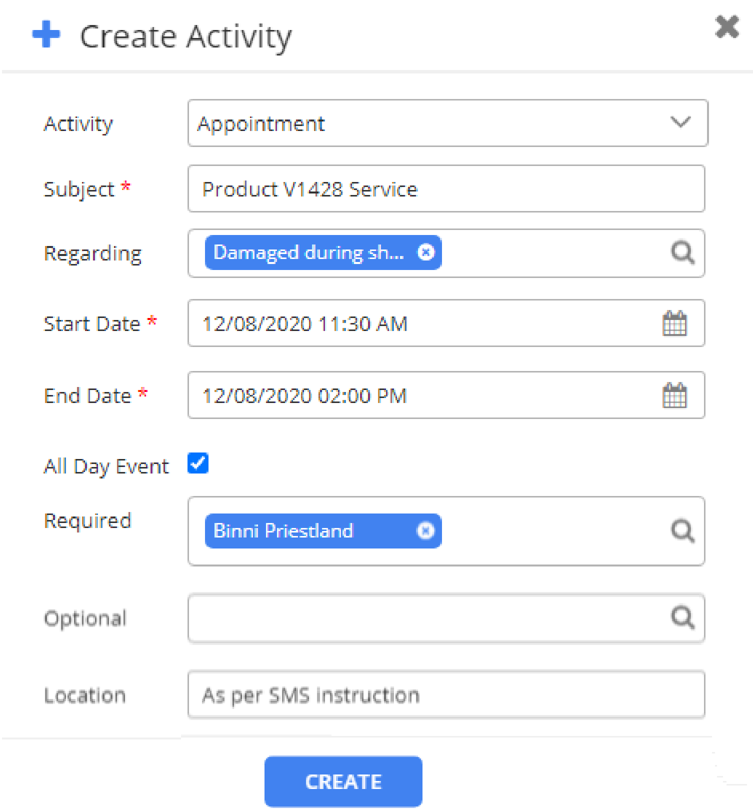


- After inserting and selecting the required details, the activity will be created.

Note: The "Quick Create Form" setting is also provided at the user level. So, you can manage the Quick Create Form" options for the specific user from the "User Calendar Configuration".

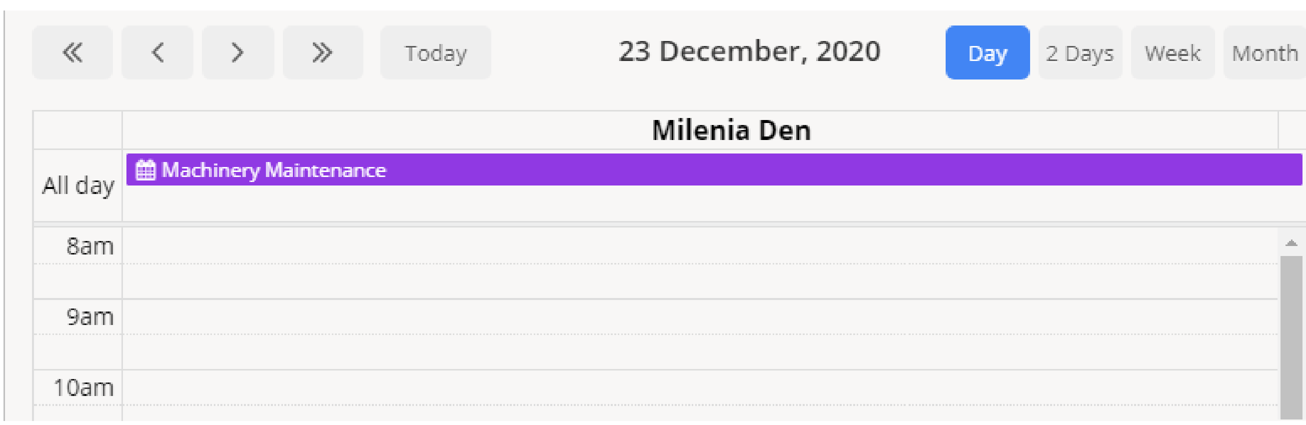
All day event for Appointment

- If the user is adding the “Appointment” activity, they will get an option to enable the All Day Event for displaying the appointment activity the whole day.



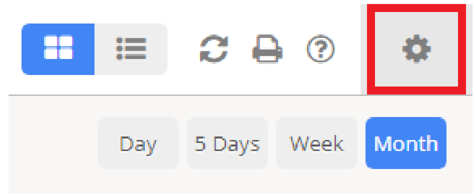
- ‘Tick’ the checkbox of the **All Day Event** when you are adding the “Appointment” activity to set the appointment activity for all day.

- Every “all day” appointment will be seen at the top of day/week/ day view in the **All day** slot.

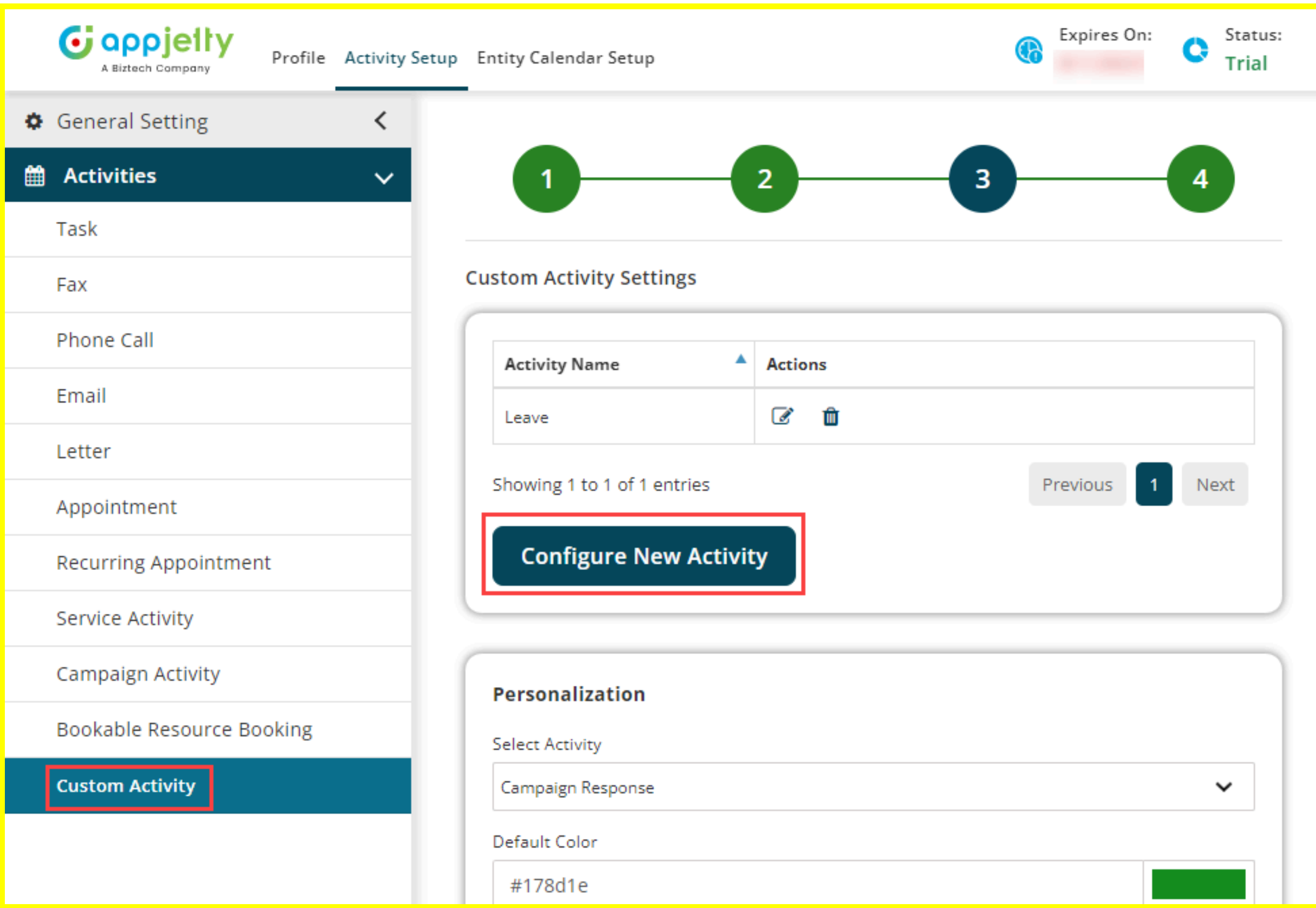


Create a Custom Activity

- To create a Custom Activity, click on **'Configuration'** icon.

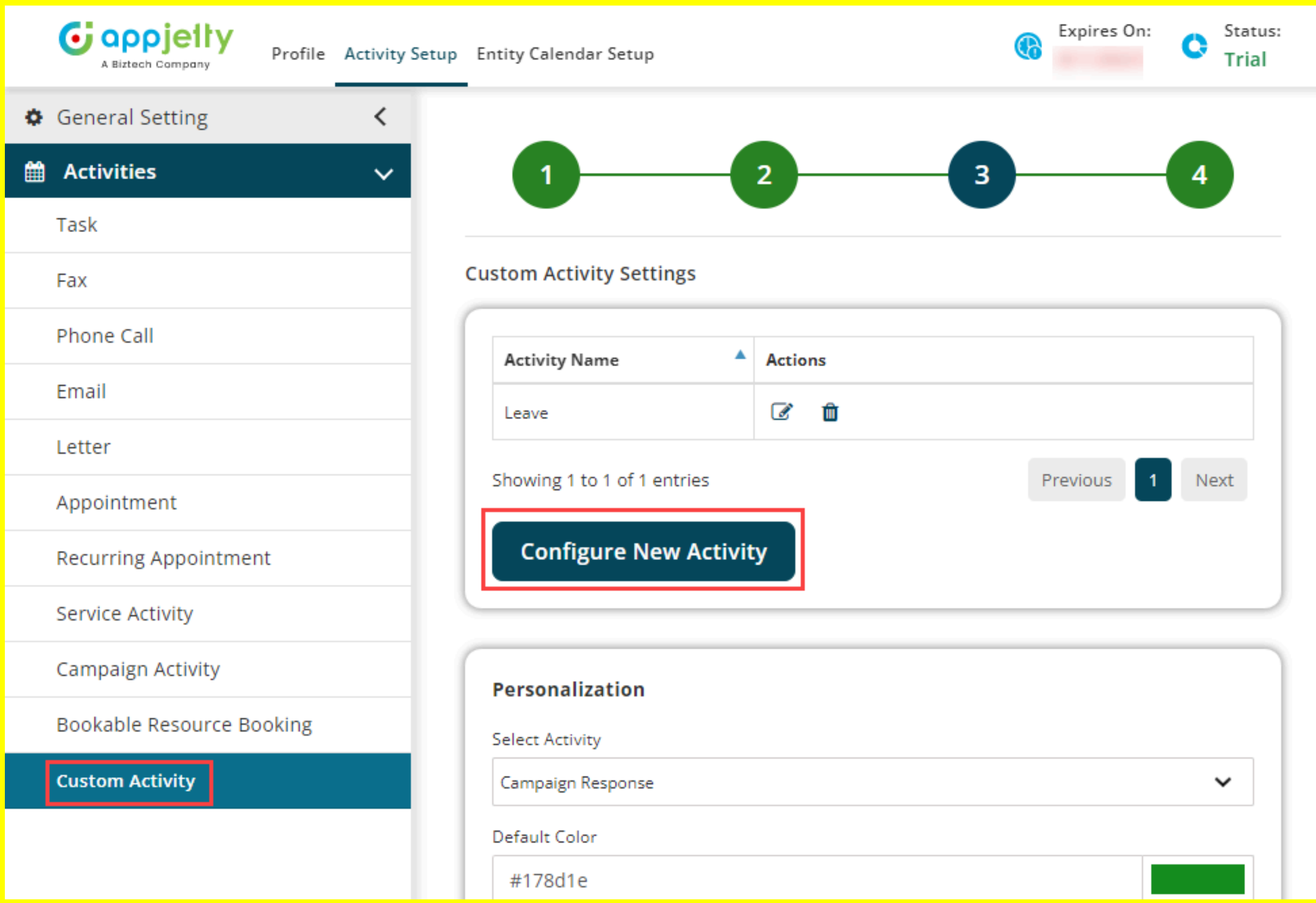


- Click on **'Custom Activity'** tab under **'Activities'** section.

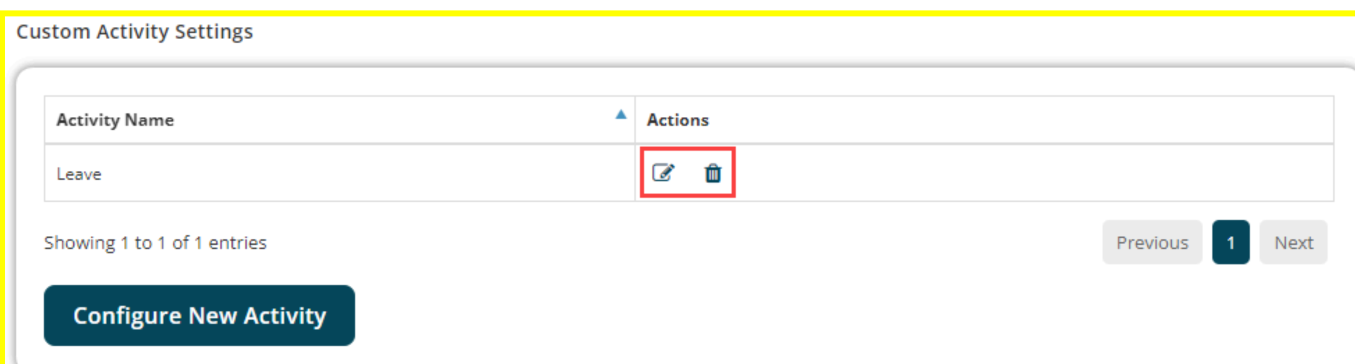


- Now click on the '**Configure New Activity'** button to create a custom activity.

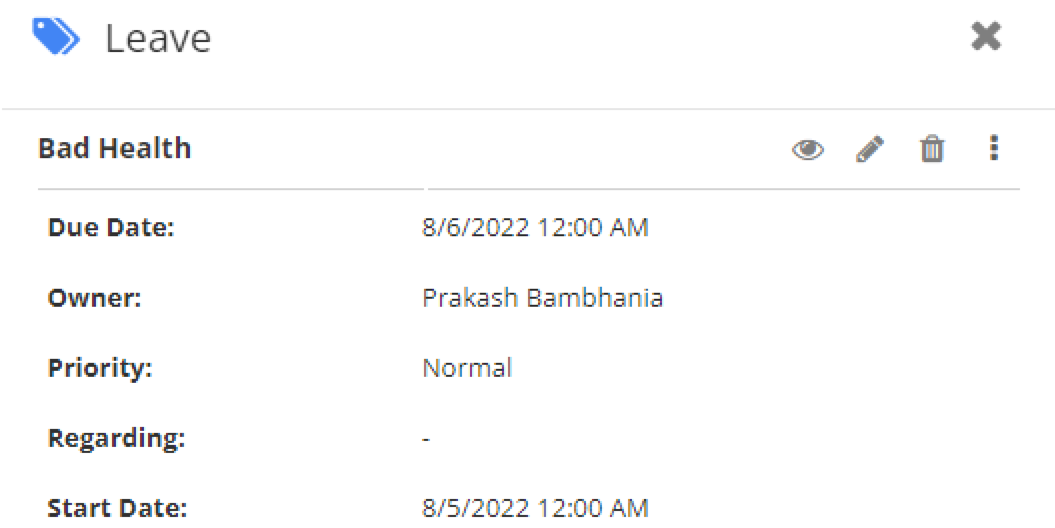
- Thereafter, following fields will appear under 'Custom Activity' tab:
- Select required 'custom' activity from the drop-down list.
- **Read Only**: If you tick the checkbox 'Read Only', no one will be able to edit the custom activity except for admin.
- As you click on the Save button, you will get a popup message of activity successfully added.



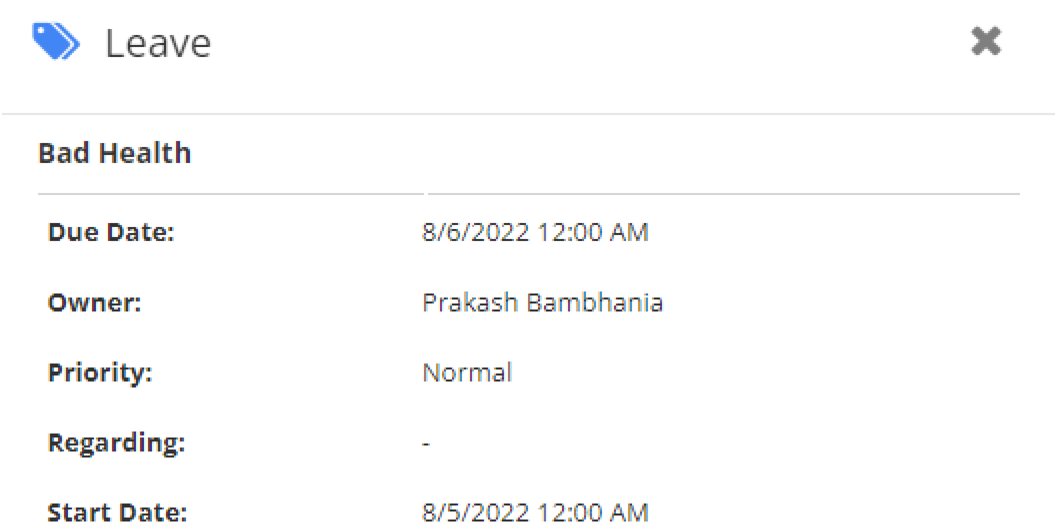
- You can 'Edit' and 'Delete' the Custom activities you have created.



- If the custom activity is not selected as **Read Only**, any of the users can edit and perform the action for custom activity.

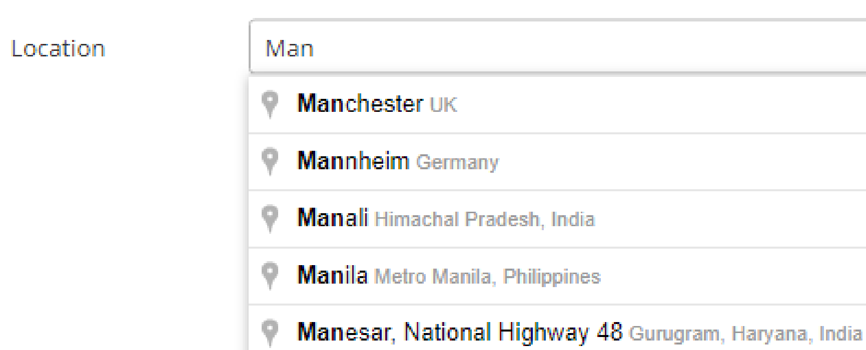


- If the custom activity is selected as **Read Only**, the users cannot edit and perform any action for the custom activity.



Location selection

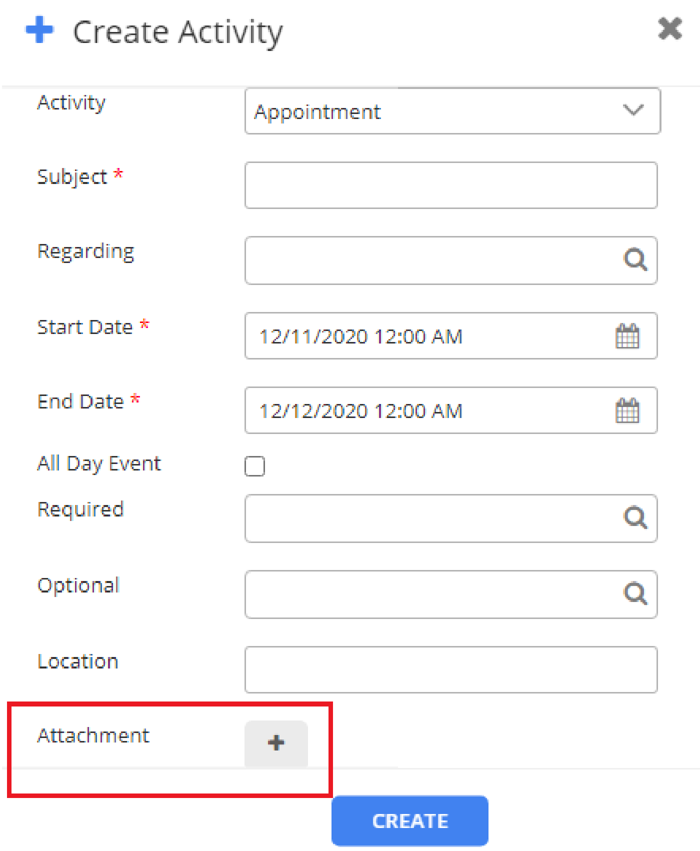
- If location suggestions are active from the 'Configurations' page, you even get location suggestions based on keyword entered under location option.



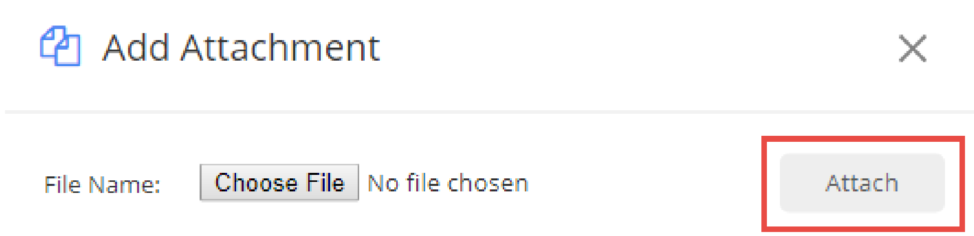
Note: Location option is enabled only for 'Appointment', 'Recurring Appointment' and 'Service Activity'.

Attachment for Activity

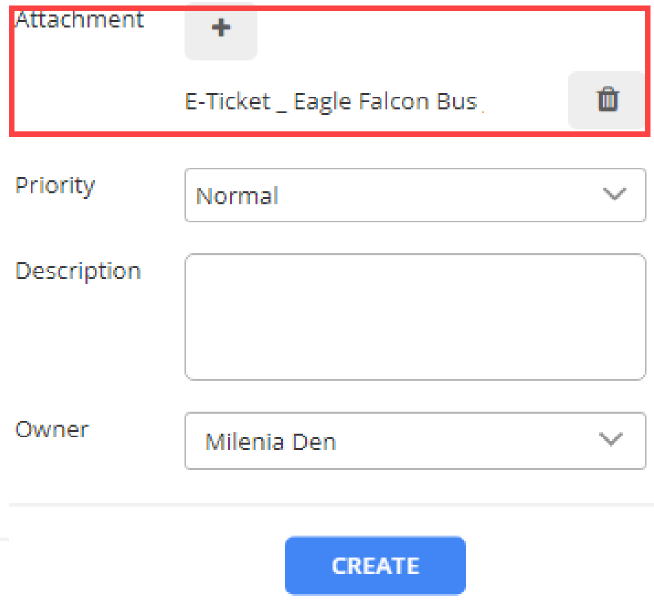
- Attachment facility is given only for the **Email**, **Appointment** and **Custom** Activities.
- To add an attachment for the activity, you will find the **Attachment** option. By clicking on **+** icon, **Add Attachment** popup will appear.



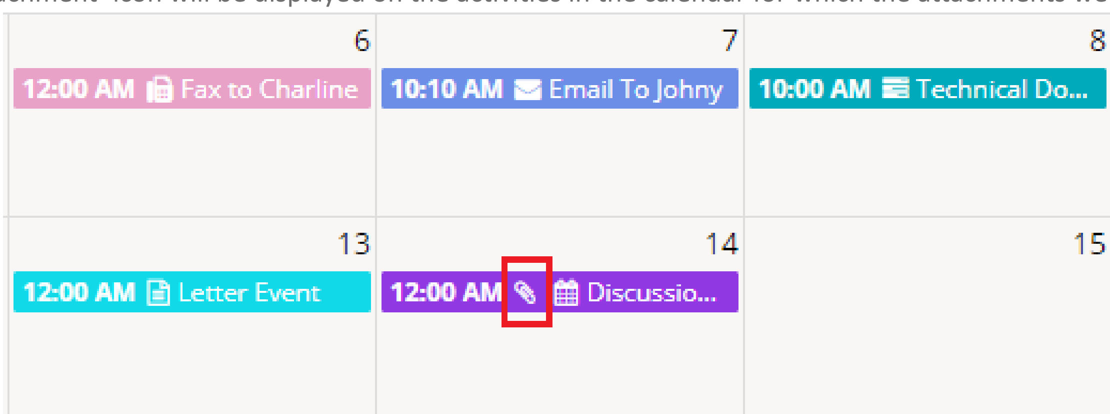
- Now choose the file to be attached as attachment and click on **'Attach'** button.



- On clicking the **Attach** button, attachment will be shown in "Create Activity" dialog box along with delete icon. Clicking on 'Delete' icon will remove that activity.

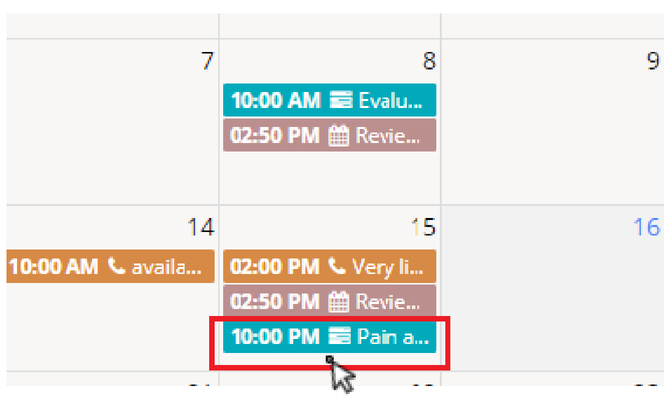


- Thereafter click on **Create** button to complete activity creation with attachment.
- ‘Attachment’ icon will be displayed on the activities in the calendar for which the attachments were added.



View & Manage Activity

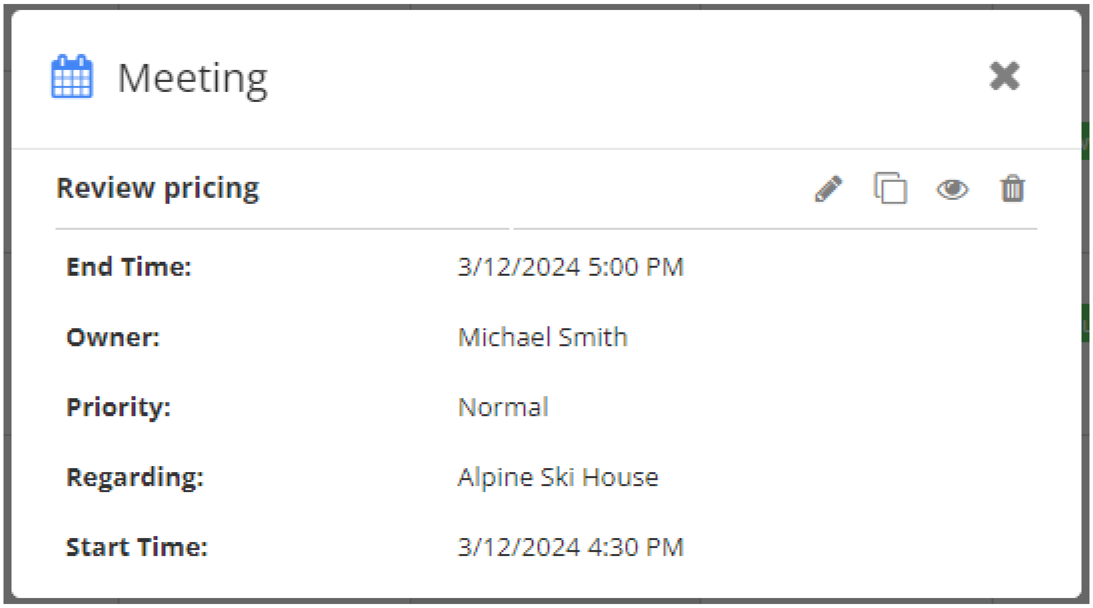
- To view details of any activity, simply click on activity.



- Clicking on the activity, the detail dialog box containing all those fields and actions buttons that are enabled from the ‘Configurations’ page will appear.

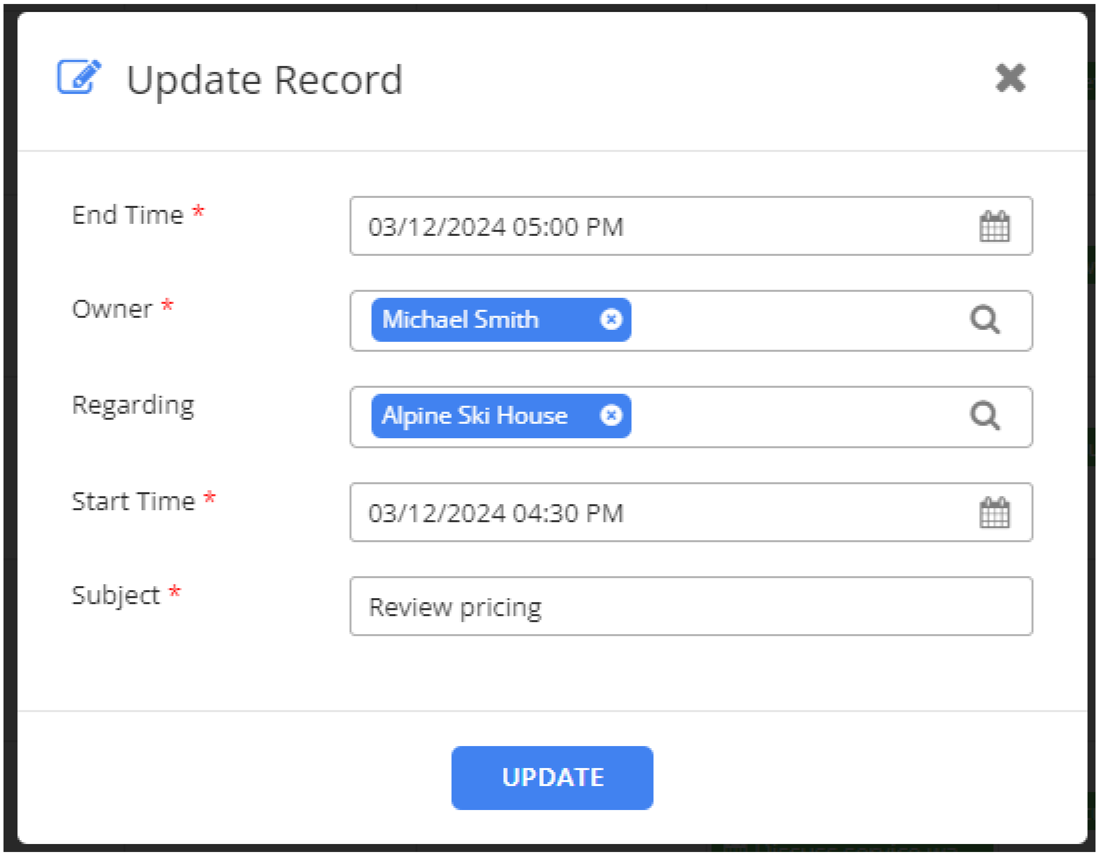
For Entity Calendar

Actions such as : Edit, Copy, View and Delete can be performed.


Meeting
Review pricing
End Time: 3/12/2024 5:00 PM
Owner: Michael Smith
Priority: Normal
Regarding: Alpine Ski House
Start Time: 3/12/2024 4:30 PM

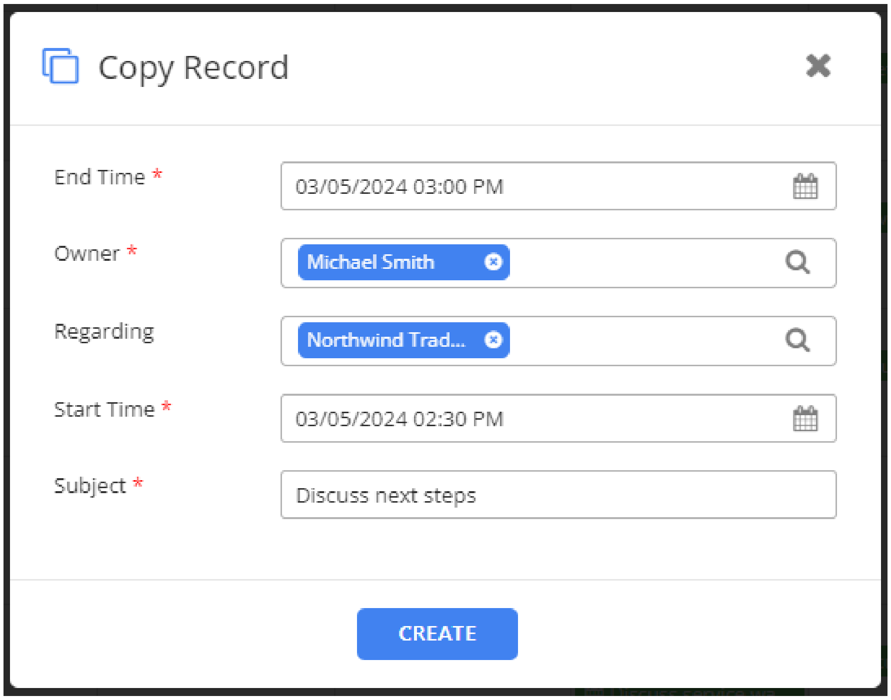
Edit icon

Users can edit the meeting details by clicking on the edit icon. An update record pop-up will be displayed from where the user will be able to edit the details.



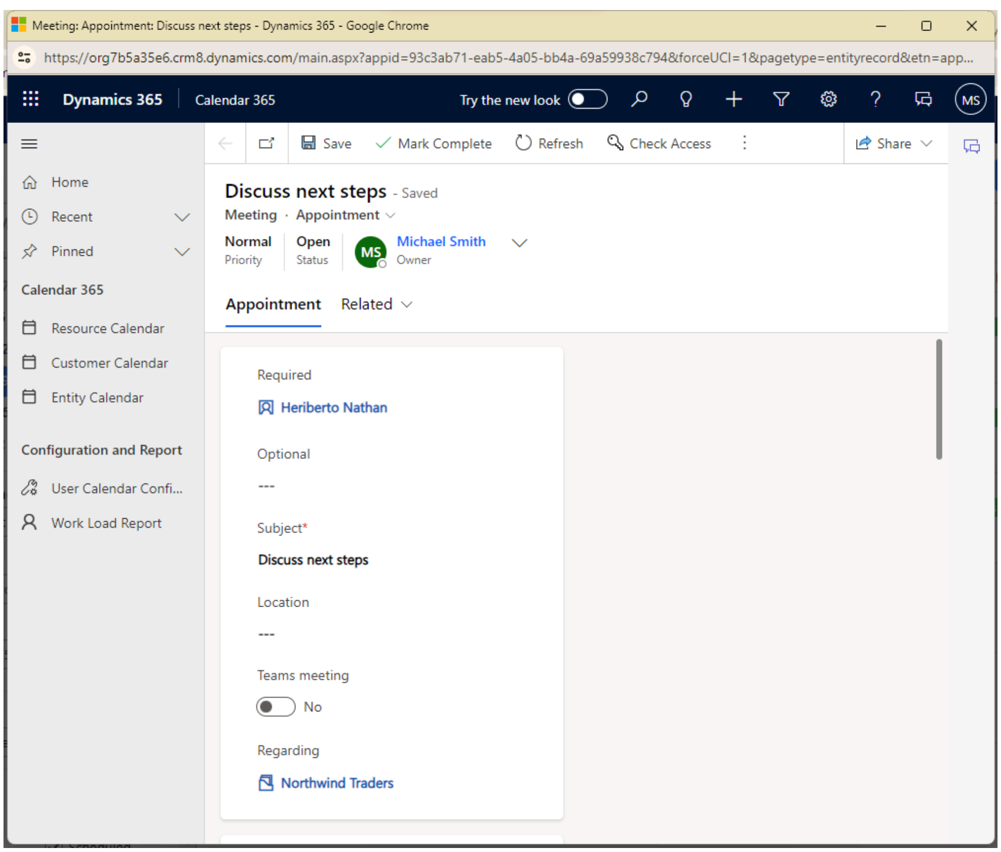
Copy icon

The copy icon will display a Copy Record pop-up from where the user can see all the details of the former meeting and through here the user will be able to create a new record.



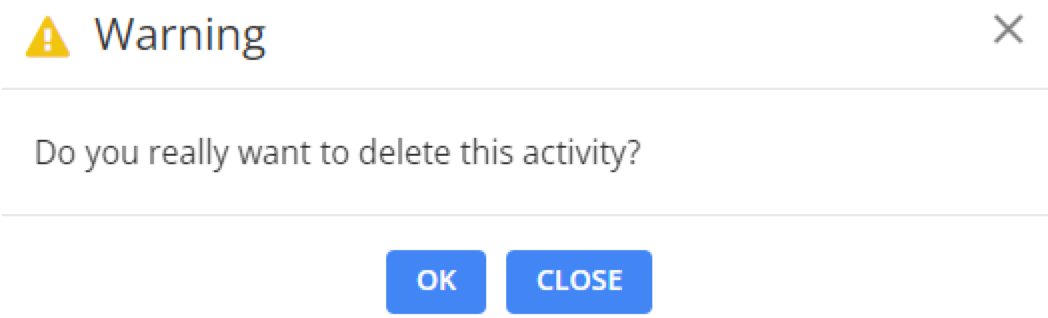
View Icon

A pop-up of the meeting details will be displayed when clicked on View Icon.



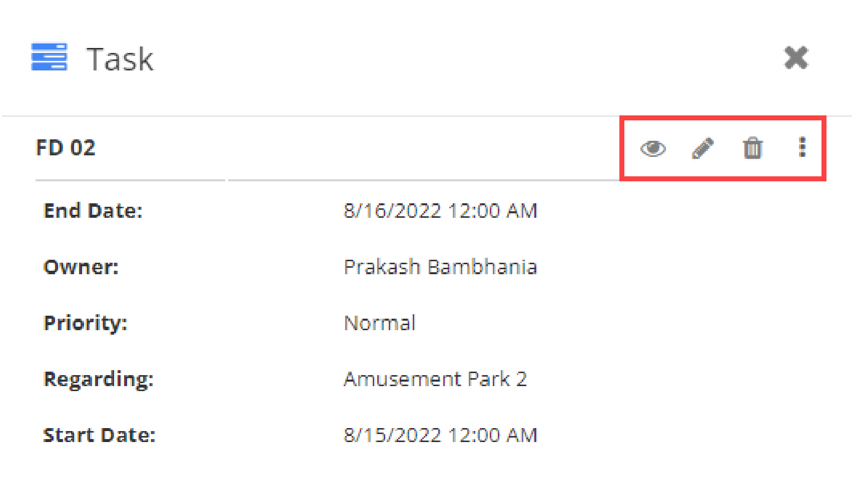
Delete icon

A warning pop-up will appear, when clicked on the Delete icon. Selecting the “Ok” option will delete the meeting.

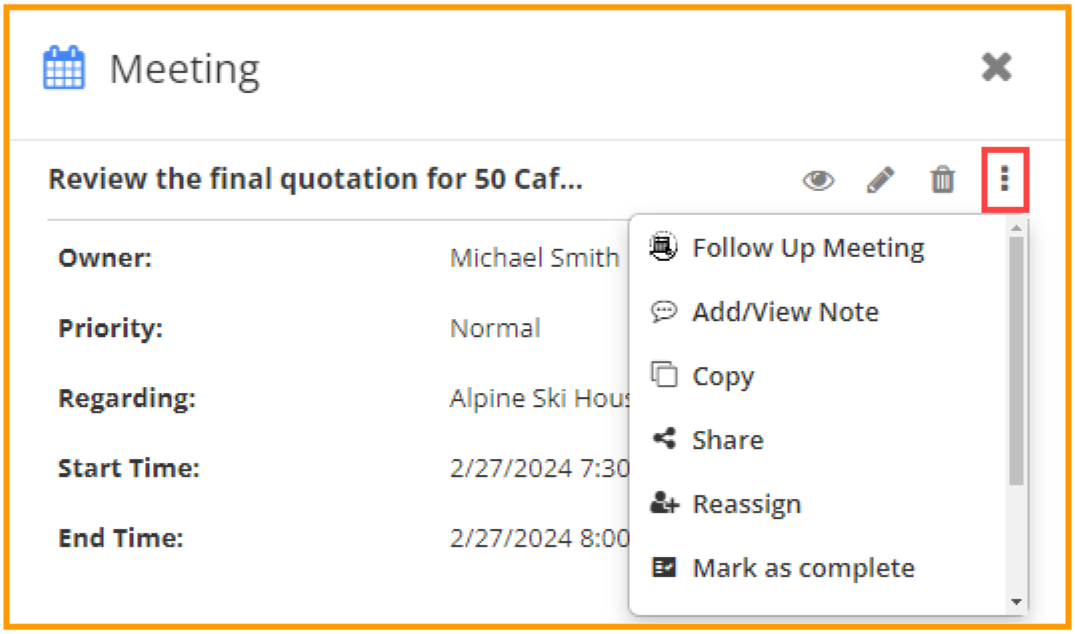


Resource and Customer Calendar

- Users can perform multiple actions like View Record, Edit the activity, & Delete the activity.



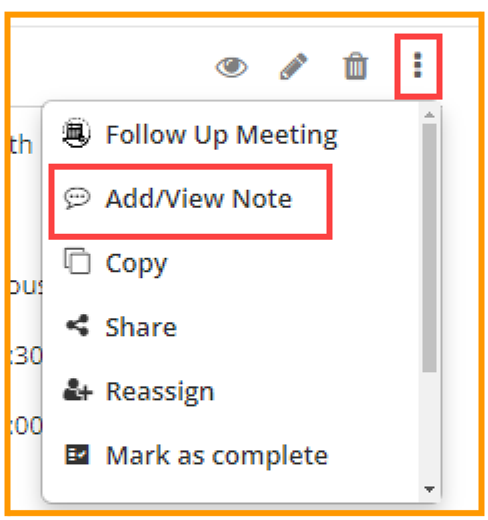
By clicking on the More Options (Three Dot) icon, you will get additional options like Follow Up Meeting, Add/View Record, Copy activity, Share activity, Reassign activity to another user, Mark as Complete, Mark as Cancel, Convert to Opportunity, & Convert to Case.

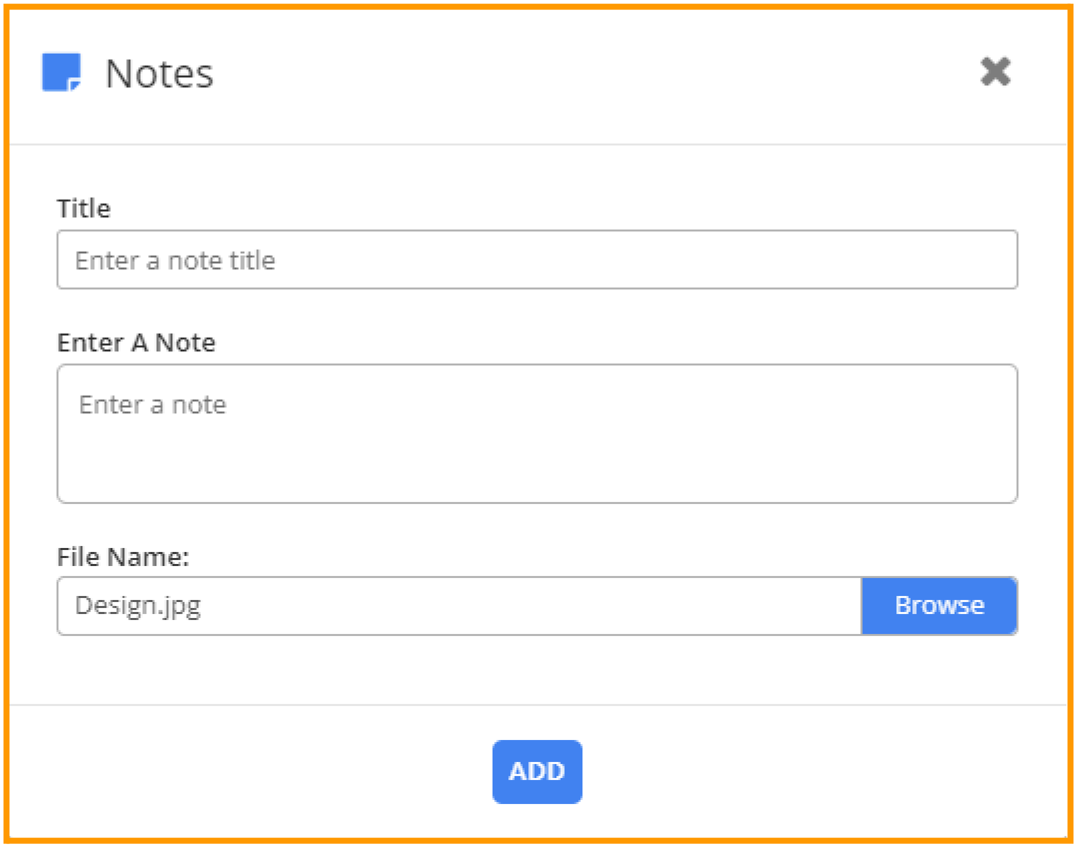


- From this Activity Detail dialog box, you can perform resultant action for the activity.
- You can perform actions:
    - Convert to opportunity
    - Convert to case
    - Convert to lead' (Only for email activity)
    - For ending the activity, you can perform actions like Mark as complete, Close campaign activity (Only for campaign activity), End series (Only for recurring appointment).

View Note

- Click on 'Note' icon to view and add any notes.



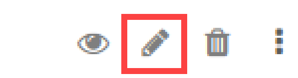


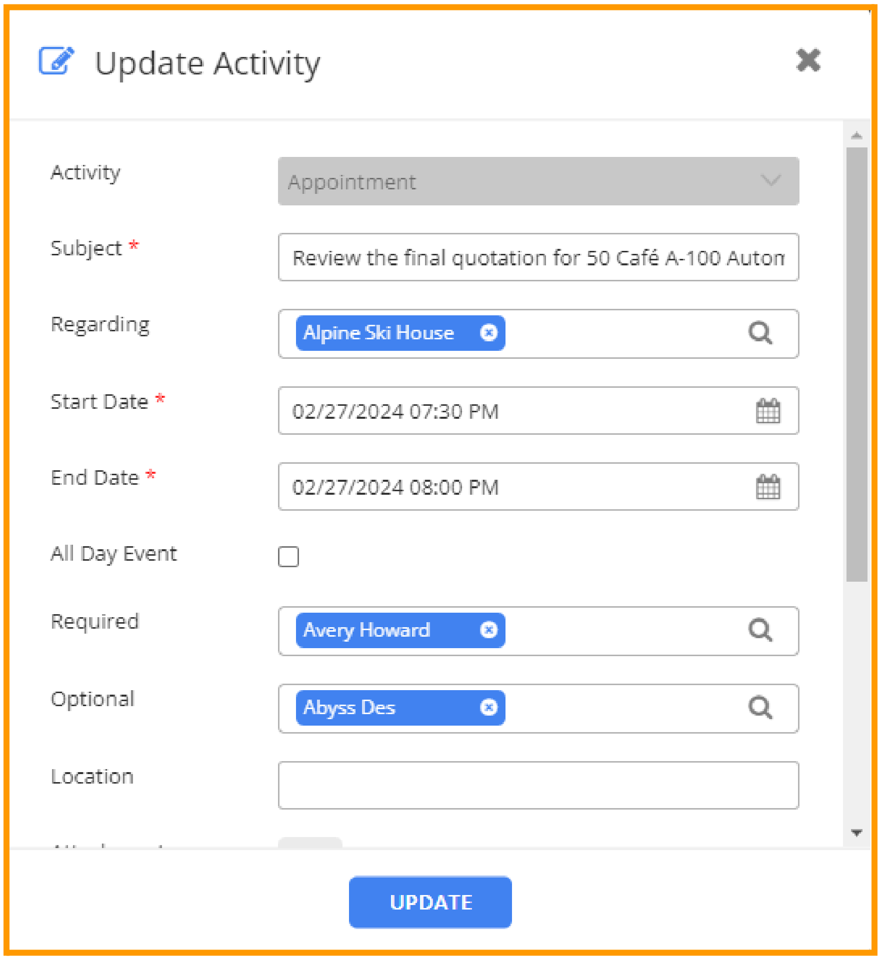
- By clicking on the ‘Notes’ icon, you can check the details of added notes for this activity.
- You can attach the file if required.

Note: All the CRM users can check and add notes.

Edit Activity

- Click on ‘Edit’ icon to edit any created activity.

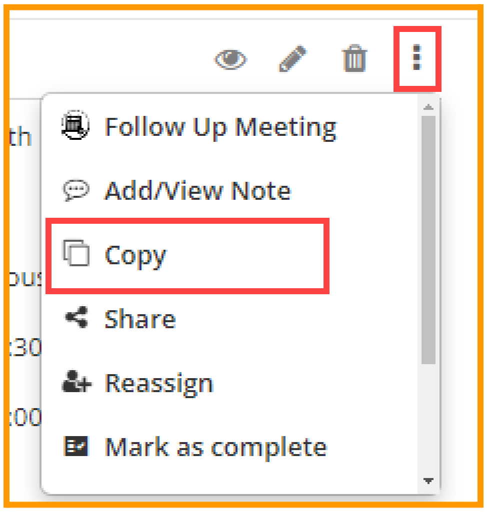


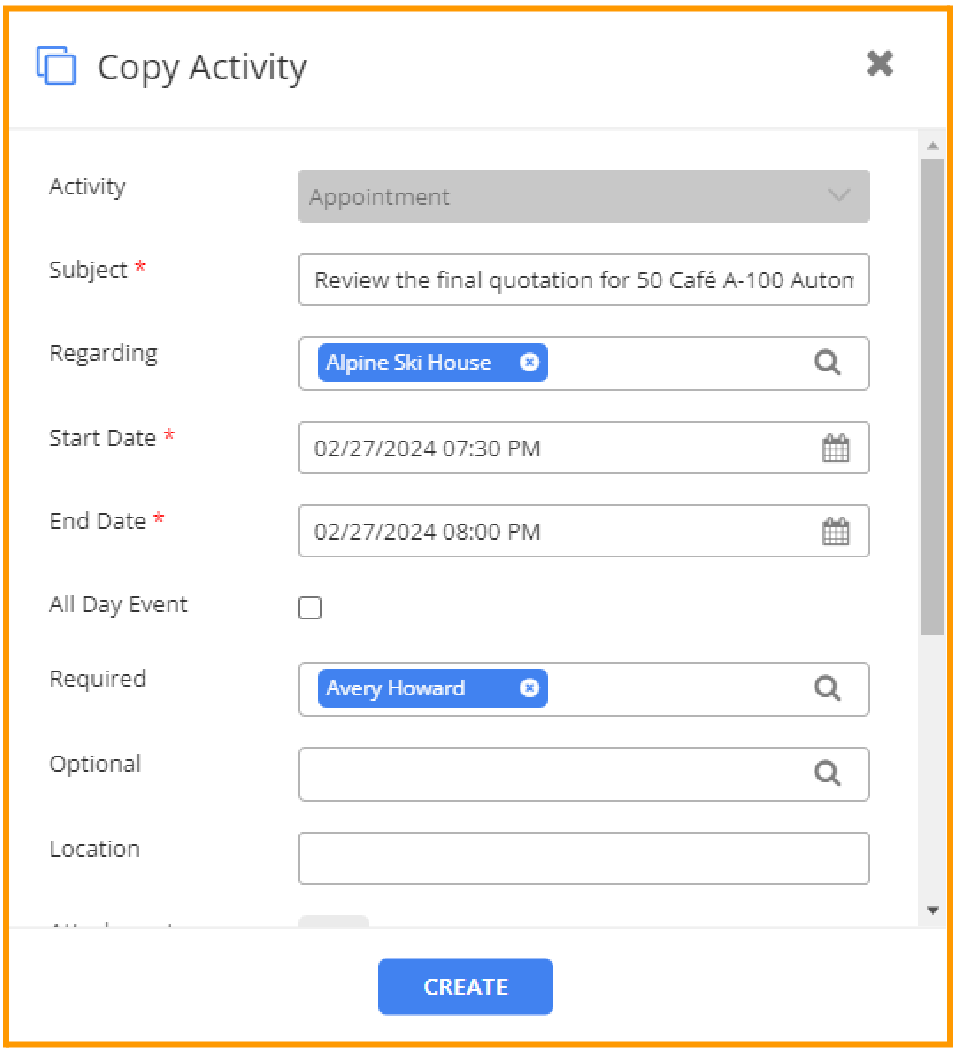


- On clicking the edit icon, it opens activity details in the edit view.
- Update or change the details and then click on the **Update** button to save changes to the activity.

Copy Activity

- Click on the copy activity icon, to copy activity details. Clicking on the copy icon you can edit all the details if required.

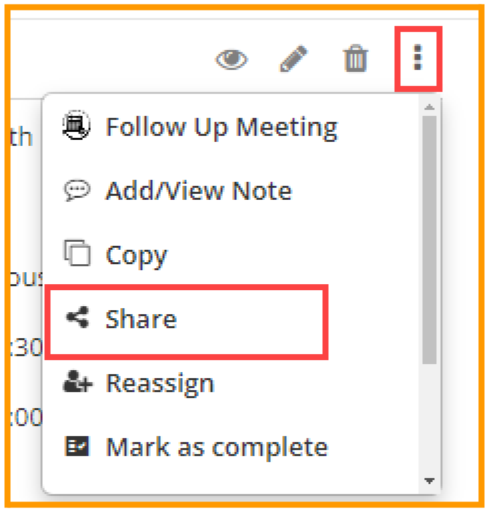




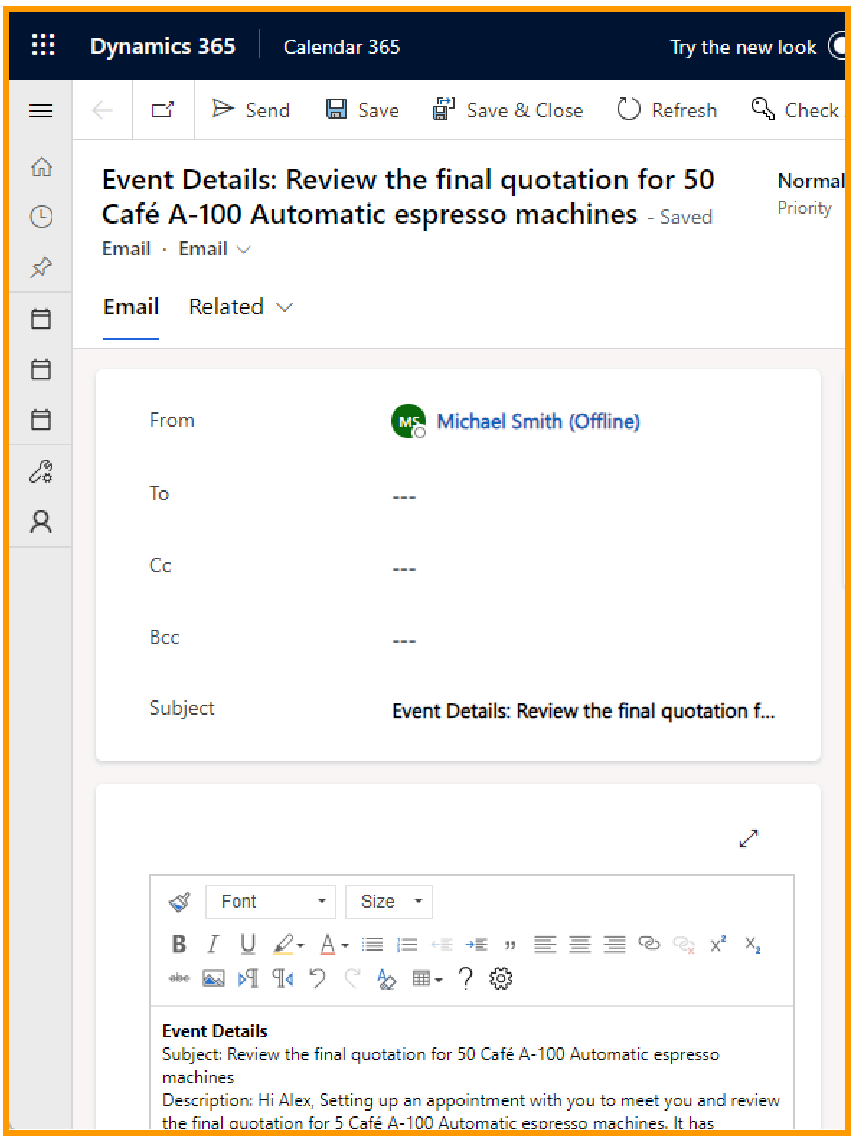
- Click on the **Create** button to complete the activity creation. If you don't edit and save it as it is, it would create a duplicate of the activity.

Share Activity

- If activity is to be shared to other users via email, click on the share icon available in the activity detail pop up.

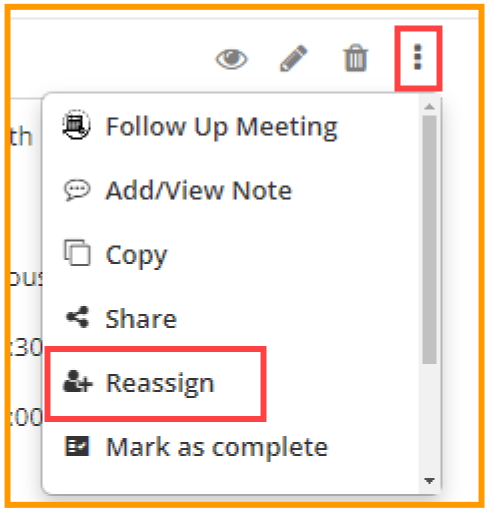


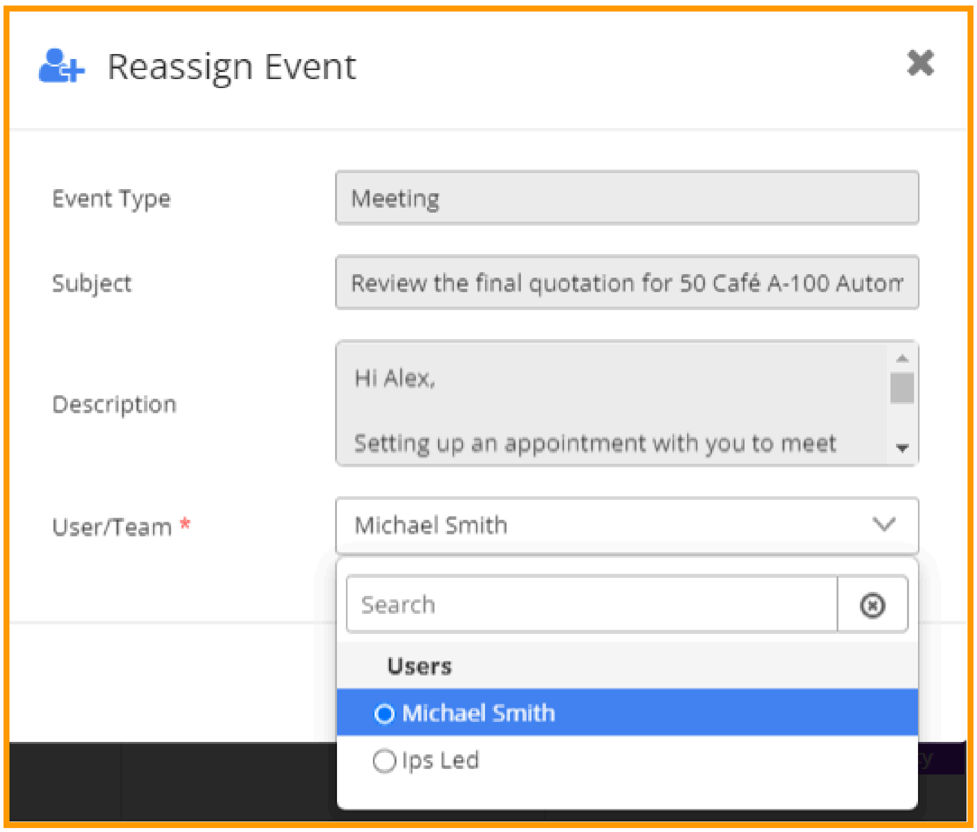
- Clicking on the icon, it redirects to the CRM page to email the activity details.



Re-assigning Activity

- To reassign activity, click on activity. It opens a dialog box. Click on ‘ ’icon.



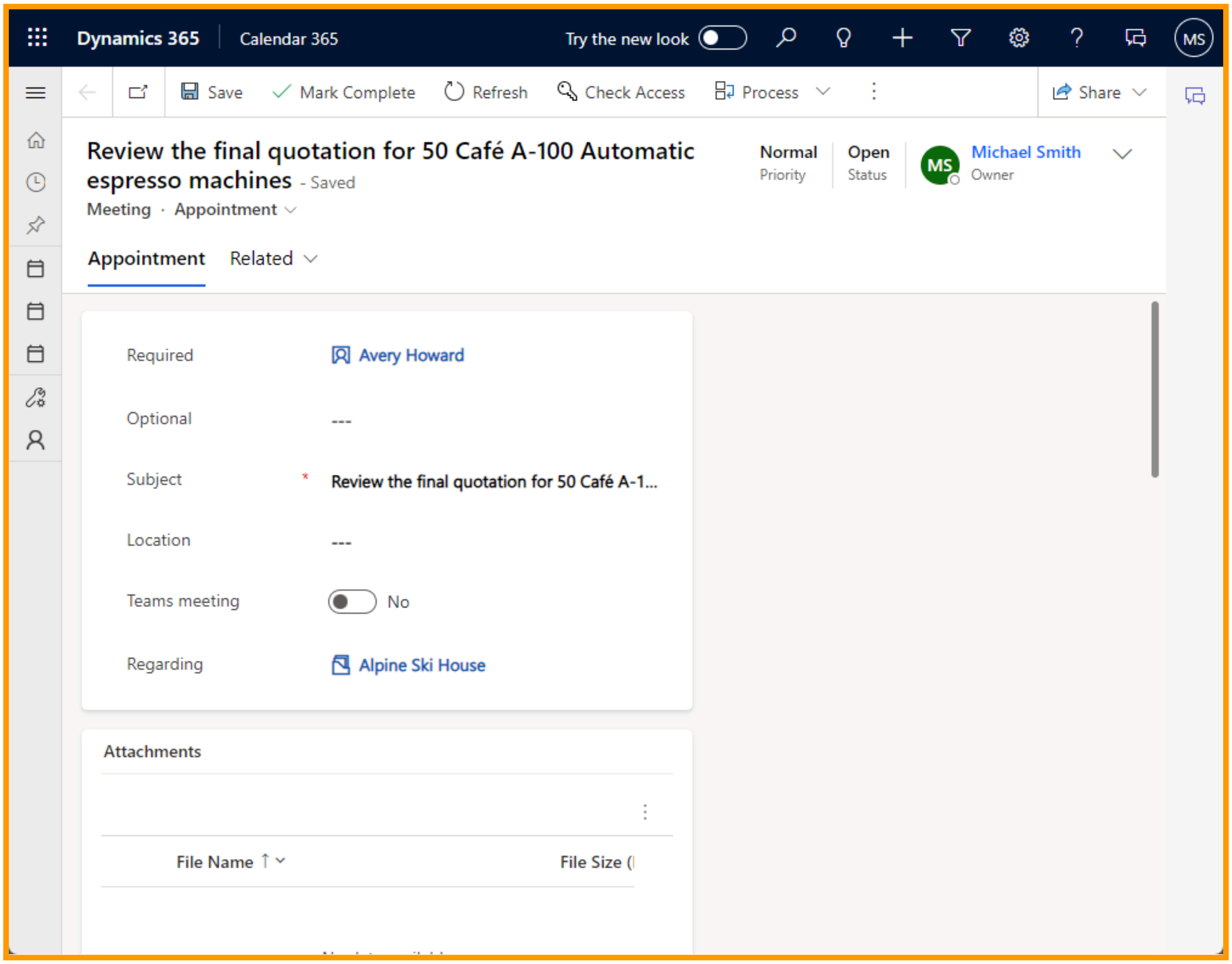


- Select the user or team from the look up records box to which the activity is to be reassigned.

Note: To reassign any activity to any user or team, they should have roles defined or else it will prompt error messages.

View Activity

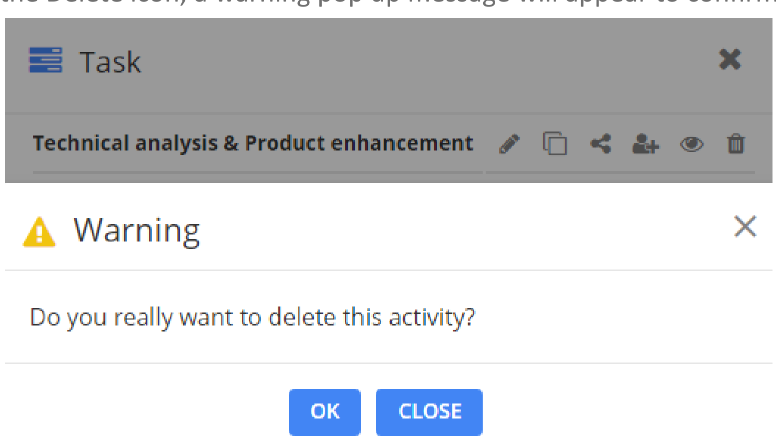
- Clicking on the ‘View’ icon, the activity record will be shown on the CRM page with all the details.



Delete Activity

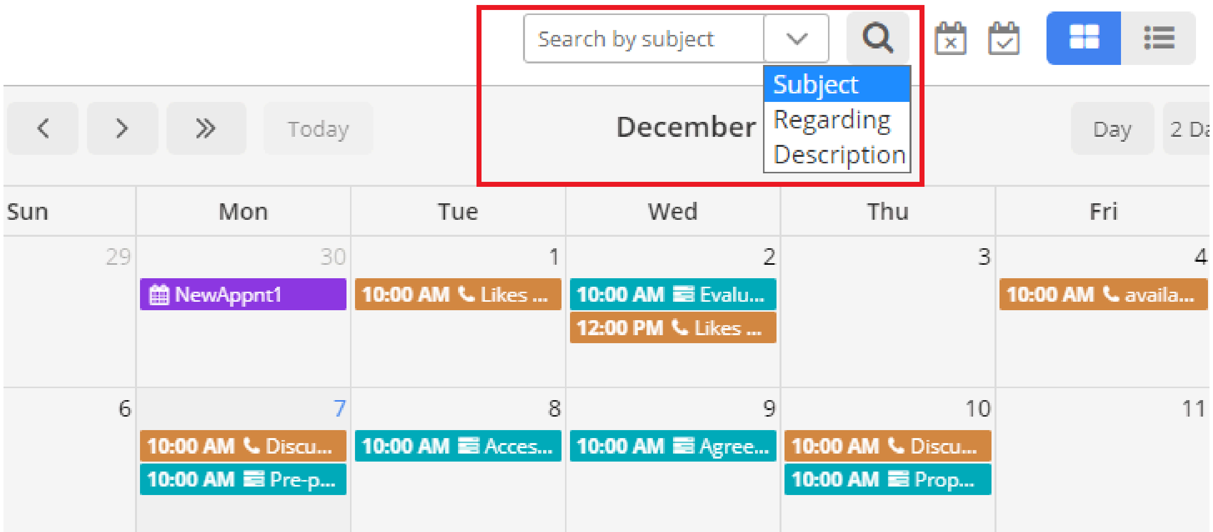
- Clicking on the ‘Delete’ icon, the activity can be deleted from the Calendar page permanently.

  - Clicking on the Delete icon, a warning pop up message will appear to confirm the action.



Search Activity

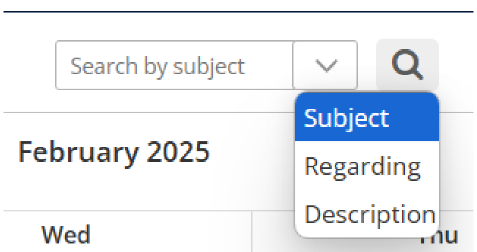
- You can search any activity by three options: **Subject**, **Regarding** and **Description** that are inserted in the activities.
- Select any search option among three and click on the search icon and it will show all activities with that keyword in the search text box.

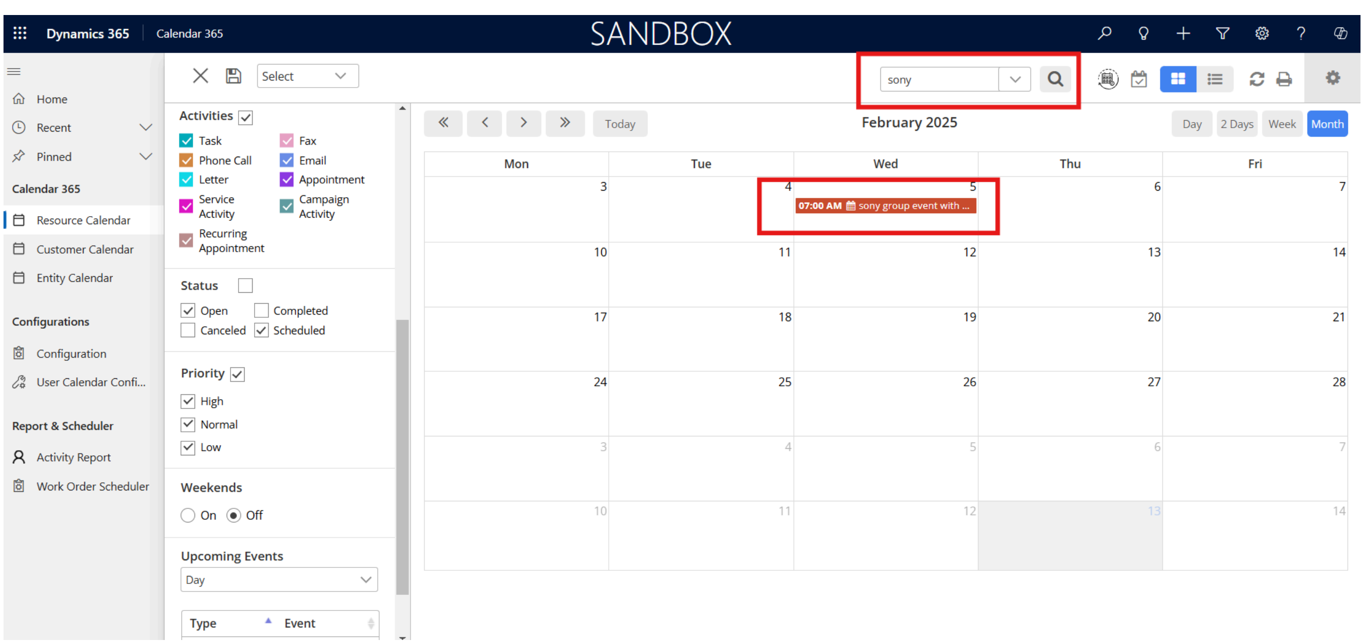


- It will display only those activities that totally fill search criteria based on selection of Search options.

Search For Entity Records

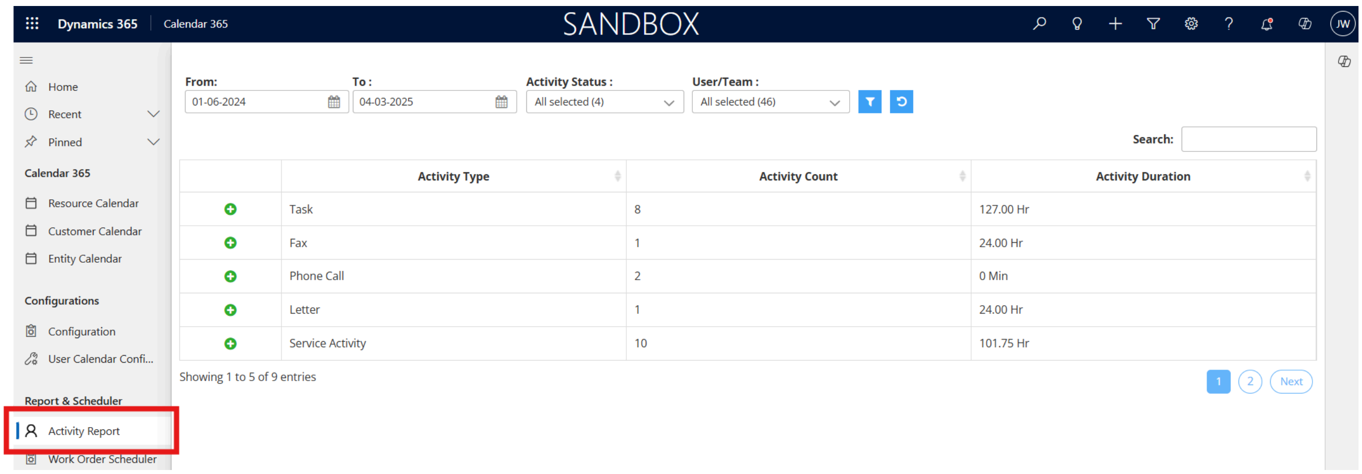
- You can search the entity records as you have enabled from the entity configuration in the "Search By Attribute" option.



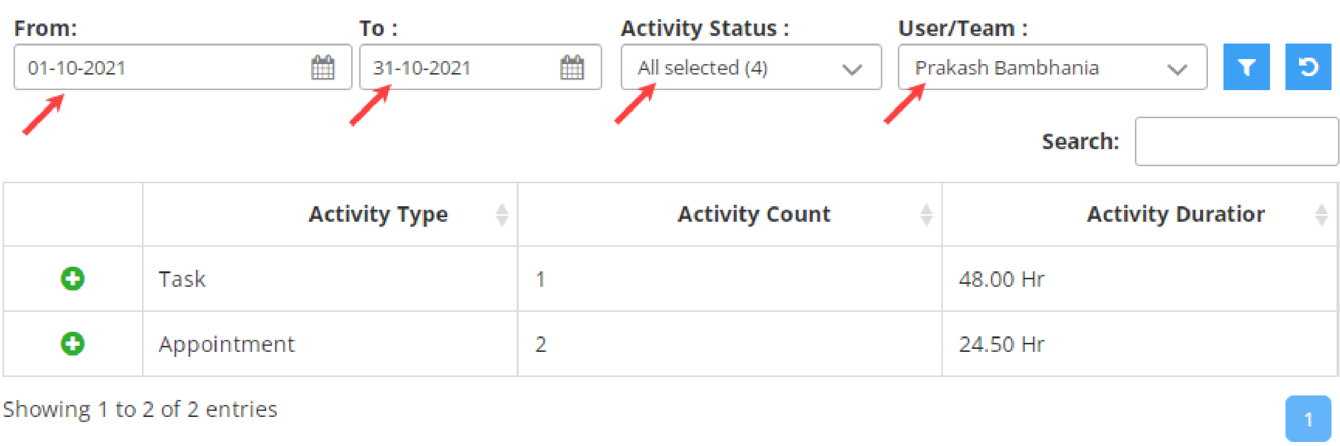


Activity Report

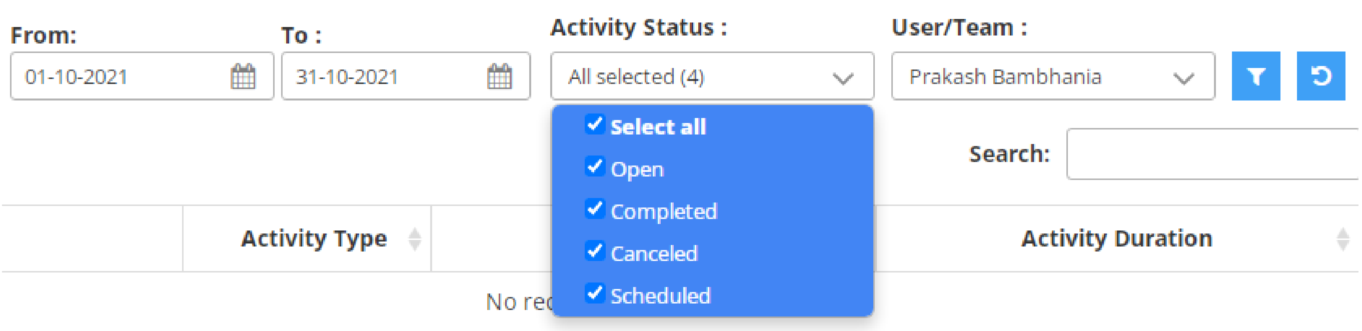
- You can see the **Activity Report** from the Calendar 365 navigation panel under the Configuration and Report section.
- If you have enabled the **Work Load Report** from "Calendar Configuration ⟶ Additional Settings", only then you will see the activity summary in the "Work Load Report".
- By clicking on it, you will see the activity summary by filtering the options.



- You can filter & search the activities as per the Date selection & User/Team selection.

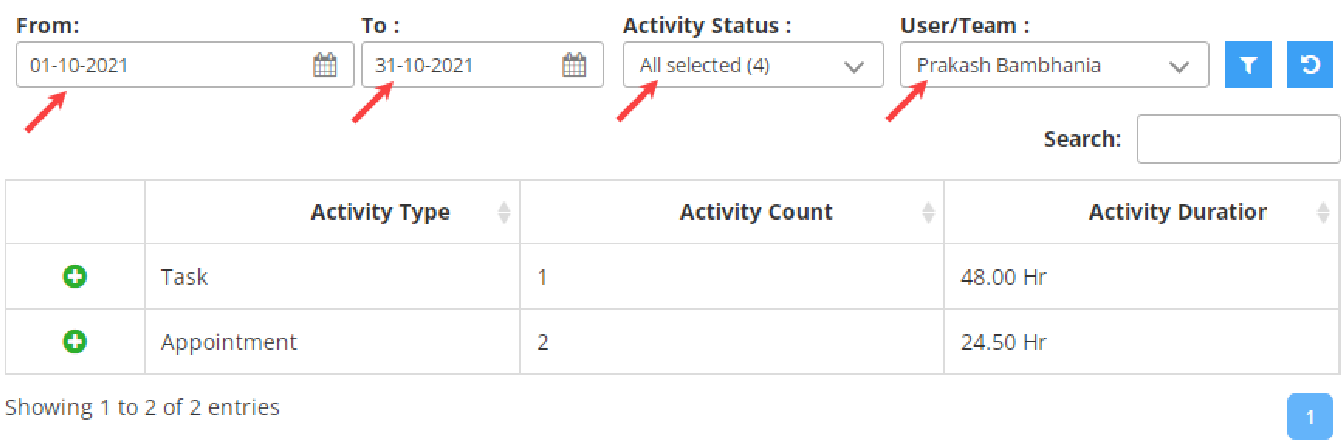


- By default, you will get the listing of the records based on the "Activity Type" as per the current day (date). You can select the following filter options:
  - From – To: It's a date range, you can get the activity records between the date selection.
  - Activity Status: Filter the activities based on their Status: **Open**, **Completed**, **Canceled**, **Scheduled** & **All**.



- User/Team: Select the required team members (user/team) to check their activities as well if any.
- Filter: Click on the Filter icon to get the activity results as per the selected details.
- Refresh: Reset the filter selection. By clicking on the 'Reset' icon, the activity records will disappear, and the current date activity records will be listed.

- Here the filter options are selected for the specific date range. By clicking on the Filter icon, you will get the activity records under the Activity Type.



- Activity Type: You will get the activities under the Activity Type. By clicking on the '+' icon, you will get the activity records.
- Activity Count: You will get the total count of how many activities are recorded for that Activity Type.
- Activity Duration: You will get the total Duration (Hrs) of all the activity records for its type.

- By clicking on the '+' icon, you will get the activity records as per the Activity Type.

From: 01-10-2021 To : 31-10-2021 Activity Status : All selected (4) User/Team : Prakash Bambhania

Search:

	Activity Type	Activity Count	Activity Duration
+	Task	1	48.00 Hr
−	Appointment	2	24.50 Hr

Search:

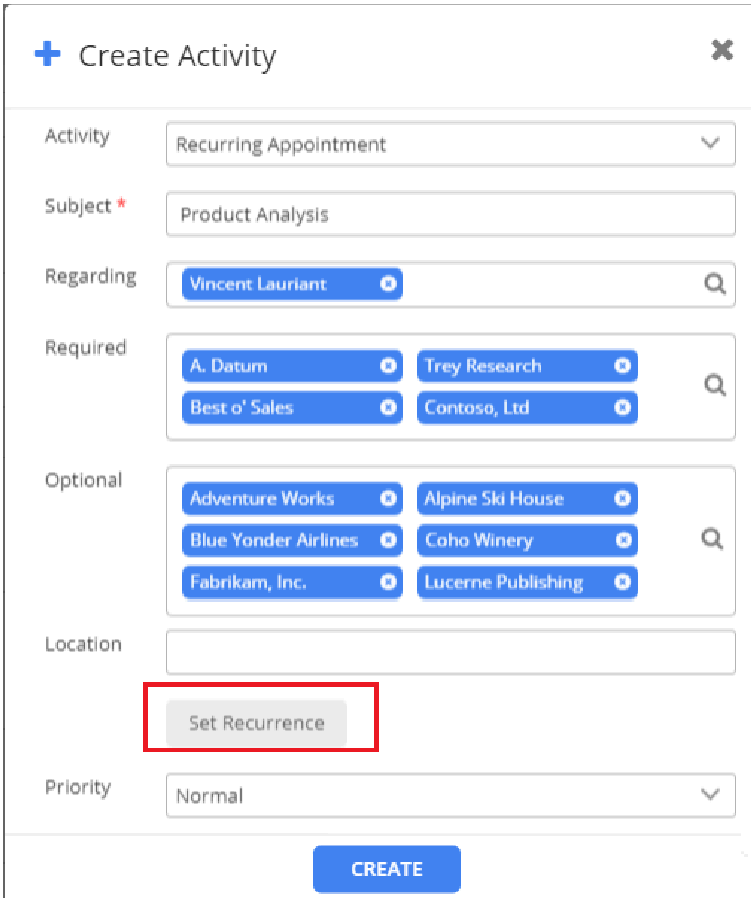
Activity Name	Status	Regarding	Start Time	End Time	Activity Duration	Action
Appoinment 1	Open	Opp 1	10/11/2021 4:30 PM	10/11/2021 5:00 PM	30 Min	
John appointment	Scheduled	-	10/12/2021 12:00 AM	10/13/2021 12:00 AM	24.00 Hr	

Showing 1 to 2 of 2 entries 1

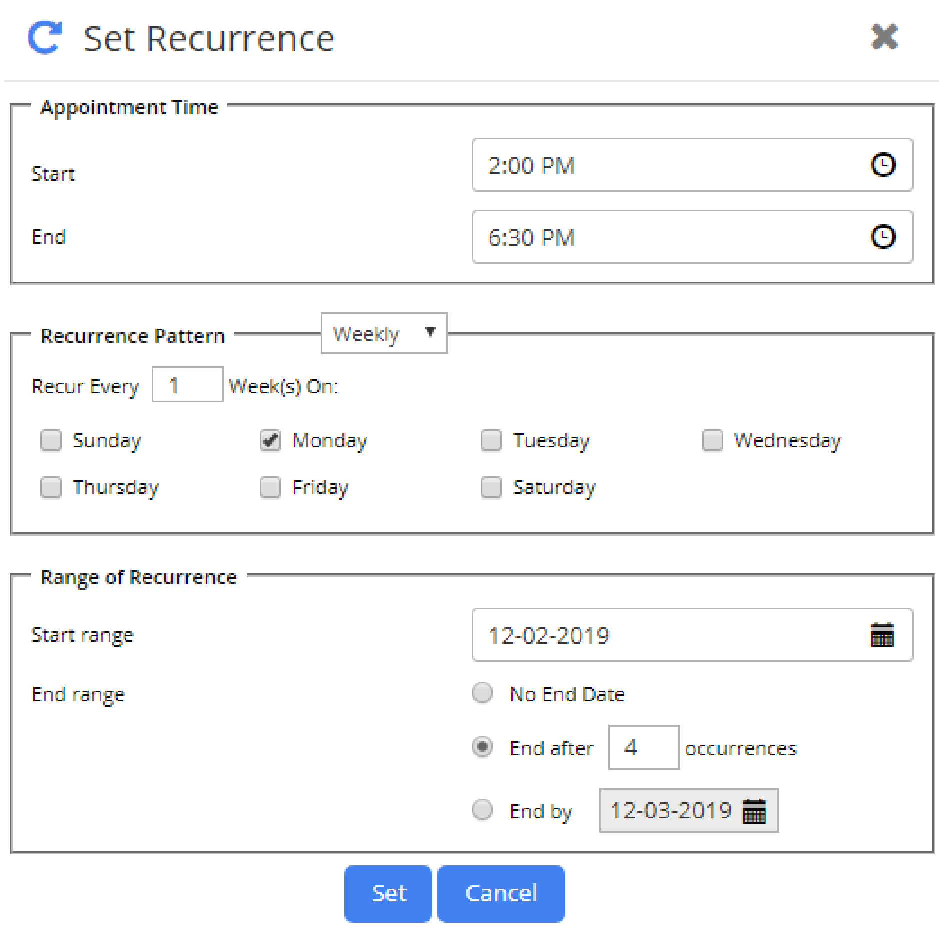
howing 1 to 2 of 2 entries 1

- You can see all the activities with some details in the gridview. You can check the activity details by clicking on the ‘view’ icon. The activity will be displayed on the default CRM backend page.

Recurring Appointment



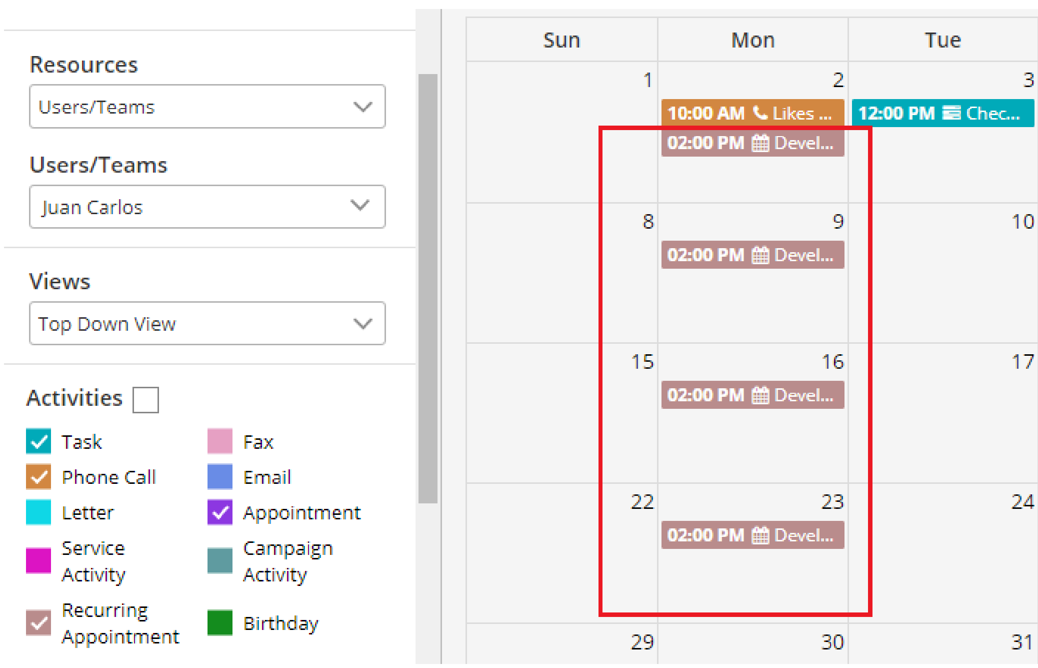
- To create recurring appointment, select activity type as 'Recurring Appointment'.
- After Inserting all the required details. Click on **Set Recurrence** button to set recurring details.
- By clicking on 'Set Recurrence' button, the pop-up named **Set Recurrence** will appear.



- Insert the details as below:

- **Appointment Time**: Select Start/End Time
- **Recurrence Pattern**: Daily/Weekly/Monthly/Yearly
  - Daily: Select day intervals or select weekdays.
  - Weekly: Insert week(s) on selecting Days.
  - Monthly: Insert Date of every month or select interval of days/week/weekends.
  - Yearly: Select Month with a date or select interval of days/weeks/weekends by selecting a month.
- **Range of Recurrence**:
  - **Start Range**: Select starting date
  - **End Rage**: Insert the 'number of occurrences' when it will end or 'End by' selecting a particular 'date' or selecting 'No End Date' if the ending date is not defined.

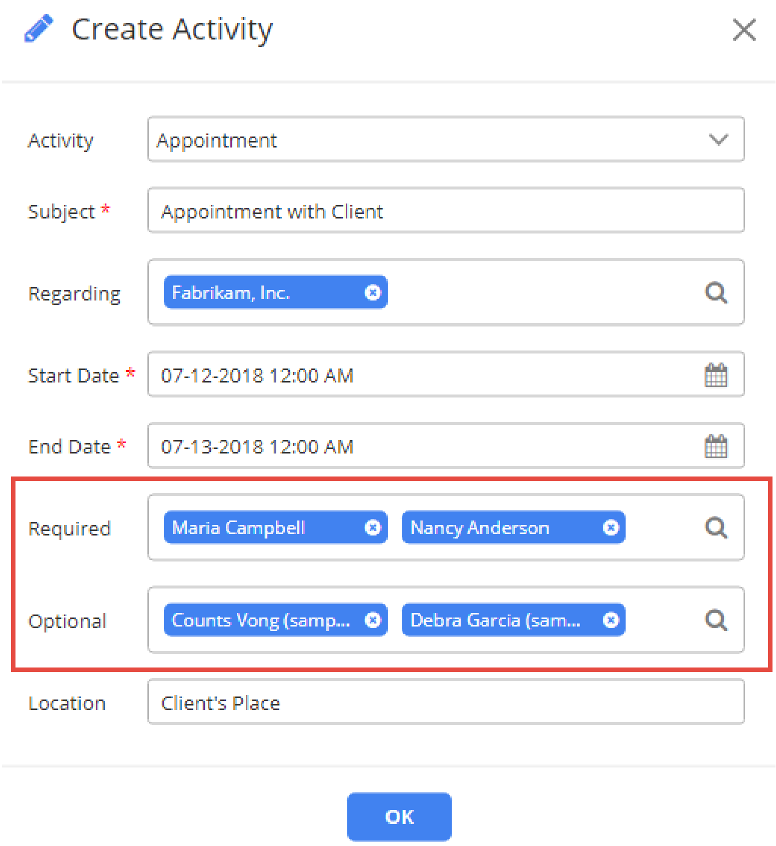
- After inserting and selecting all the details, click on **Set** button to save recurrence and then click on **Create** button to complete the recurring appointment creation.



- Now you can see the recurring activities in the calendar as per Set Recurrence details.

Share Activity

- You can share the activities in which the multiple resources are involved.



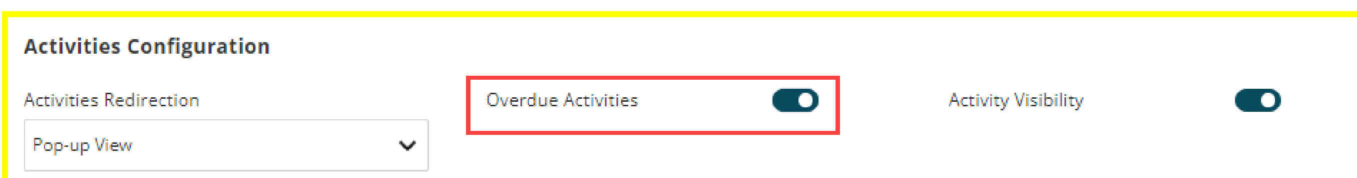
- While creating the activities in which multiple resources are selected, the activity will automatically be assigned to the resources and those activities will be displayed in their calendar as well.
- In appointment activity, one needs to mention required and optional users while in case of other activities it appears as from and to.

Note: For activity to be visible in multiple calendars, users should be selected in the look up record option.

All the activities can be shared with multiple resources except **'Task'** Activity.

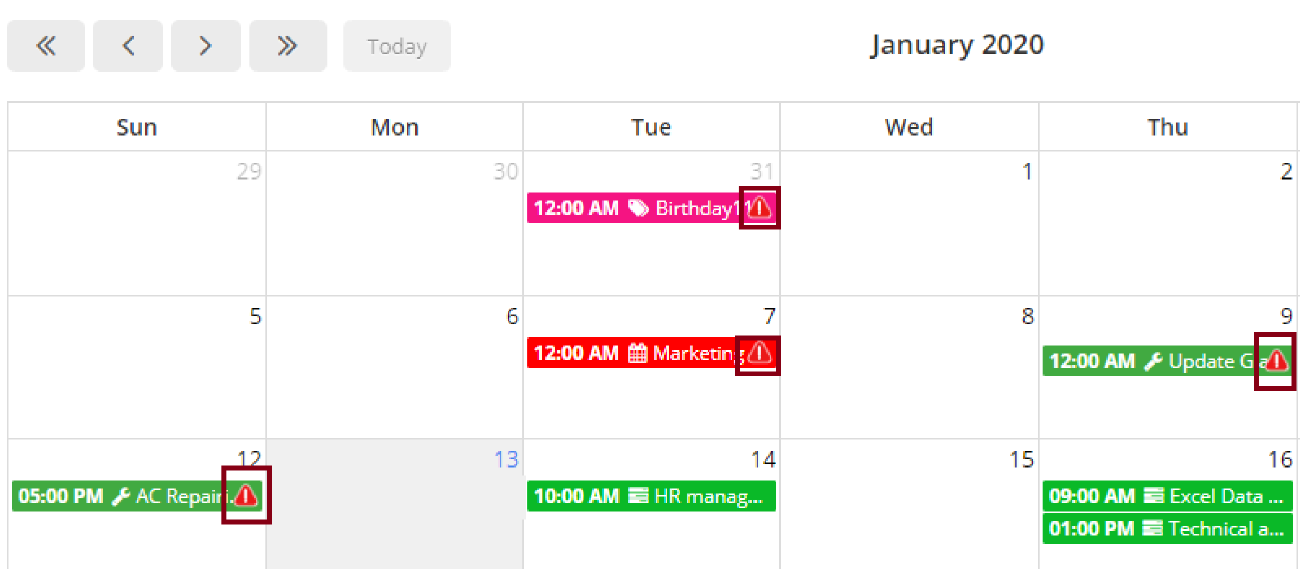
Overdue Activities

- You can configure 'Overdue Activities' by selecting 'Yes'.



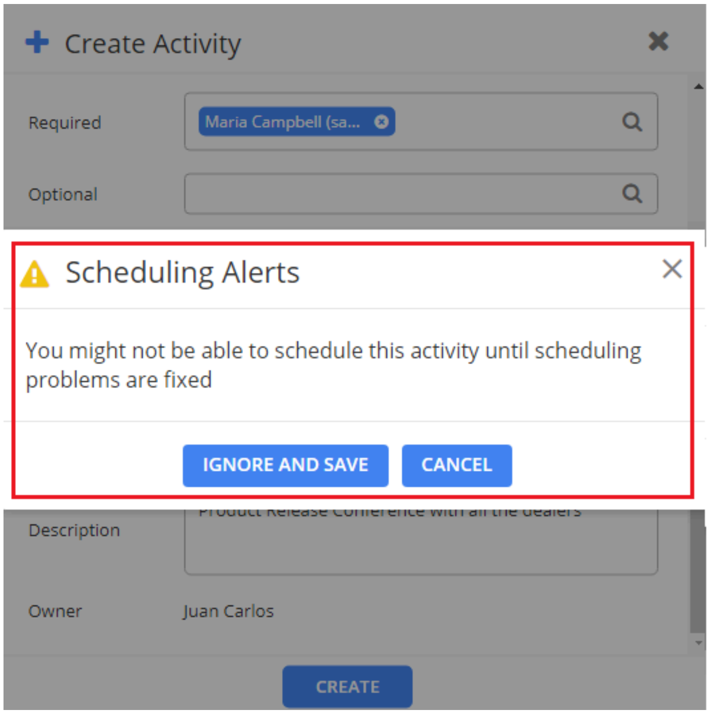
Overdue activity on Calendar

- If you have selected **Yes** for 'Overdue Activities' in Backend configuration, the **expired activities** will be highlighted with 'red' alert ⚠ mark.

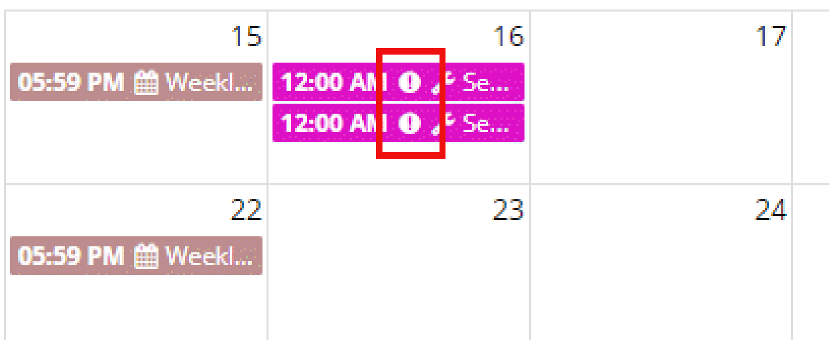


Conflict Management

- On creating all the activities except Custom activity, if scheduling of any activity conflicts with the same activity it shows alerts only if enabled from the backend configurations.



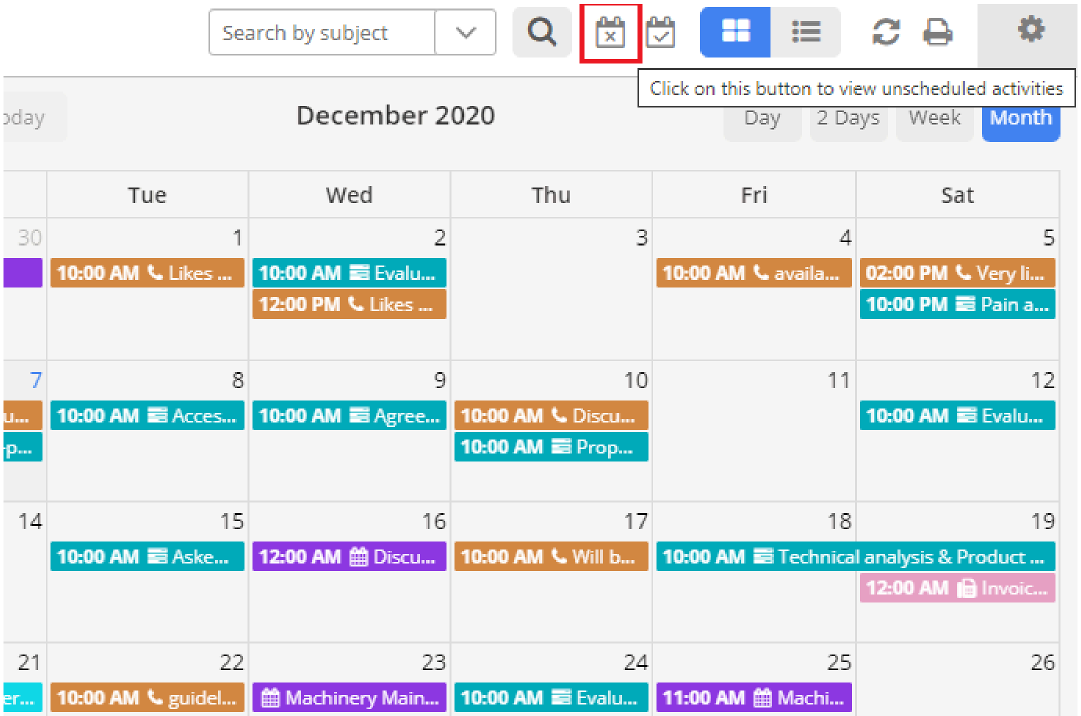
- On clicking the **Ignore and Save** button, activity gets saved but with conflicting error messages on the activity. Clicking the **Cancel** button, scheduling gets canceled and you again get to reschedule the date and time of the activity.



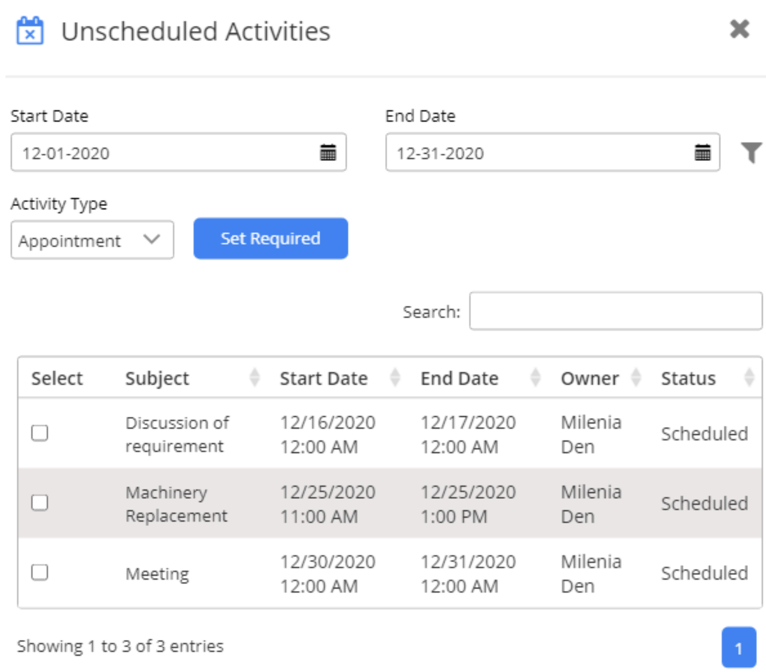
Note: You get scheduling alerts for all the activities except Custom activity. And it works only if conflict management is enabled from the configuration page.

Unscheduled Activities

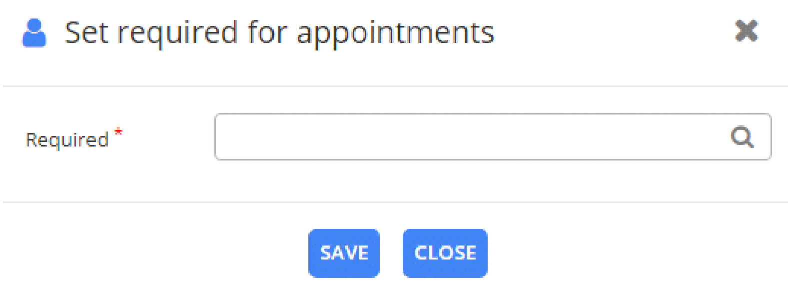
- If you have enabled the **Unscheduled Activates** option from the configuration and the 'Appointments' and Service activities' don't have any required **attendees** and **assigned resources**, the **Unscheduled Activities** button will appear on the header in the Calendar page.



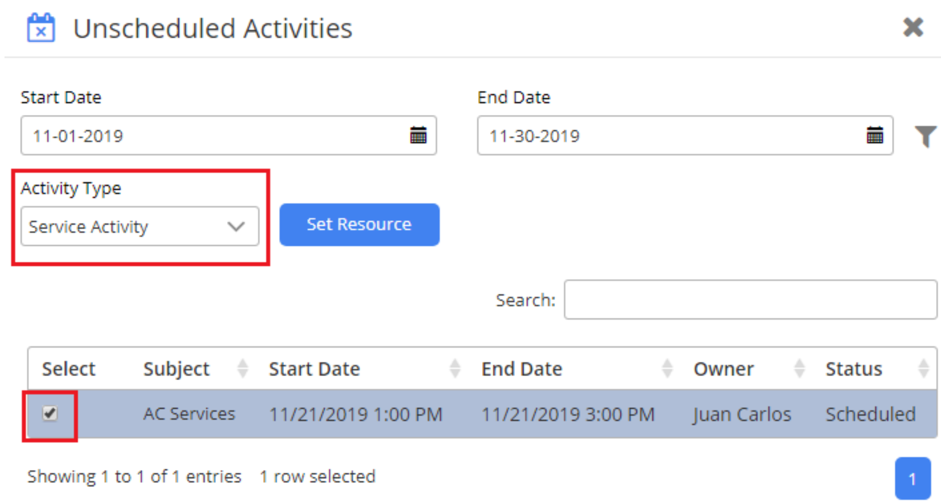
- It opens a dialog box with a list of Unscheduled Activities.
- This list comprises two activities based on the activity type selected. Start and End date filters to filter activities along with search box to search activities.



- If activity type is ‘appointment’, it shows all the appointments that don’t have any required attendees assigned.
- To assign attendees to an appointment, select **appointment** as the ‘activity type’ from the dropdown, select activities and click on **Set Required** button.
- Clicking on ‘Set Required’ button, it will open dialog box to select required attendee.
- Select the attendee as required and click on **Save** button.

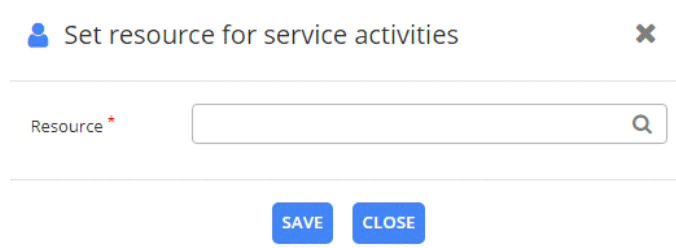


- Upon saving, attendees get assigned and that activity gets removed from the list of unscheduled activities.
- If 'activity type' is **service activity**, it shows all the service activities that don't have resources assigned.
- To assign resources to the service activity, select service activity as the activity type from the dropdown, select the service and click on **Set Resource** button.



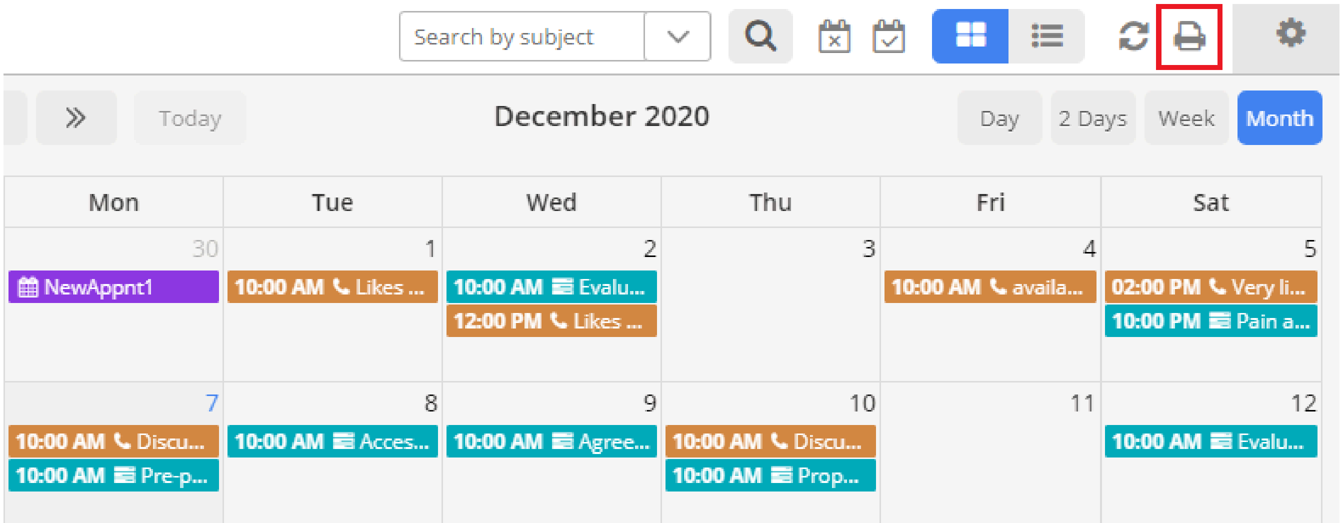
- Clicking on 'Set Resource' button, it will open dialog box to select required resources. Select them as required and click on Save button.

- Upon saving, resources get assigned and that activity gets removed from the list of unscheduled activities.



Print Calendar

- To print the calendar, navigate to right hand side of the calendar and click on **'Print'** icon.



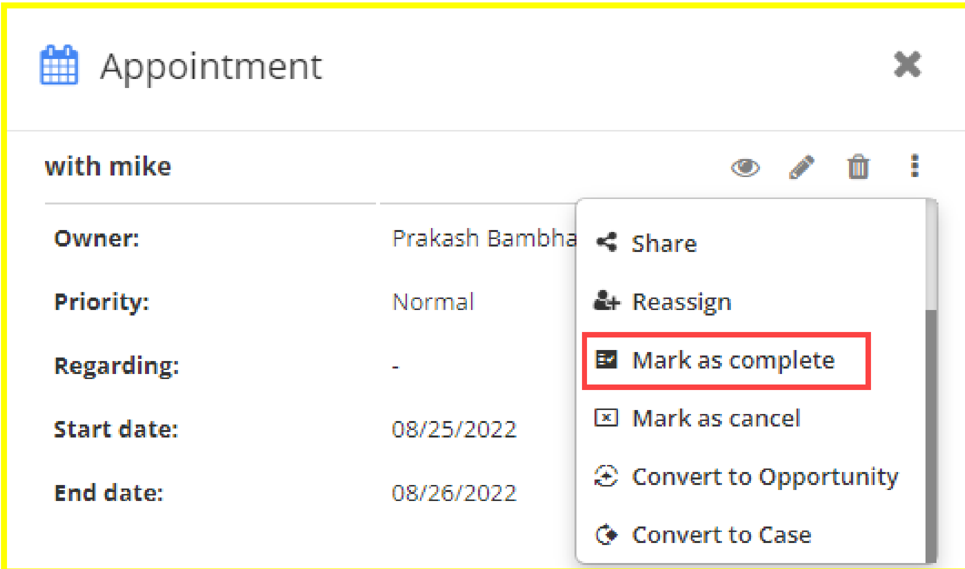
- You can print the calendar in Portrait view as well as Landscape view in different formats like PDF, XPS Document Writer, directly fax it and save to Google Drive.

Activity Action

Clicking on any activity you will get the detail view with activity actions. You can directly complete any activity by clicking on Mark as Complete/Mark as Close and convert any activity to Opportunity/Case by clicking on 'Convert to Opportunity'/'Convert to Case' respectively.

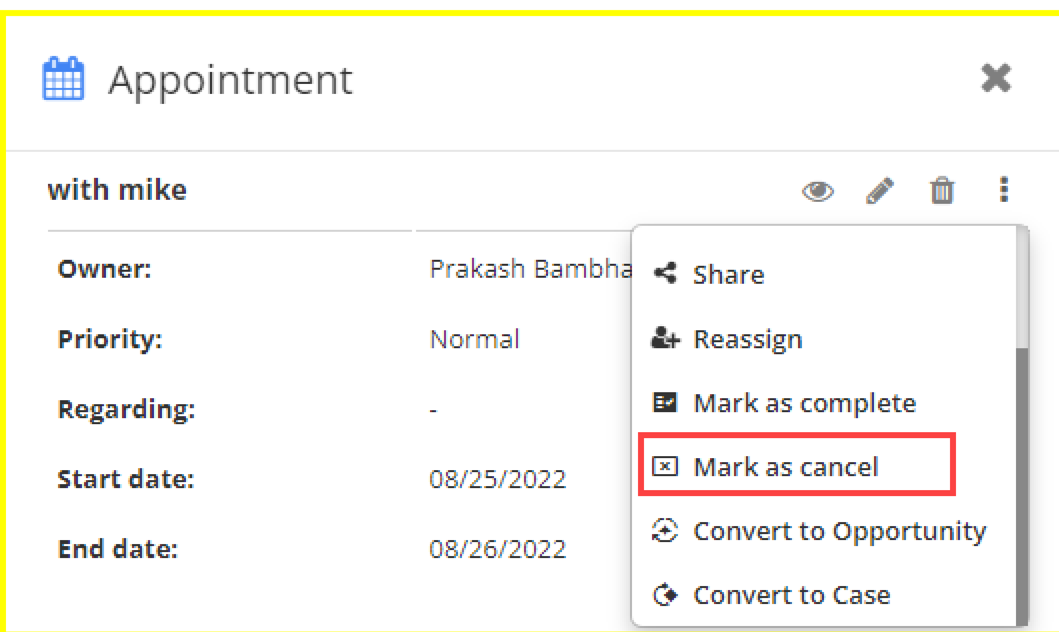
Mark as Complete

- You can directly complete an activity from calendar itself by clicking on **Mark as Complete** button. On clicking this button, warning message appears. Click "OK" to complete the activity and its status is updated as **Completed**.



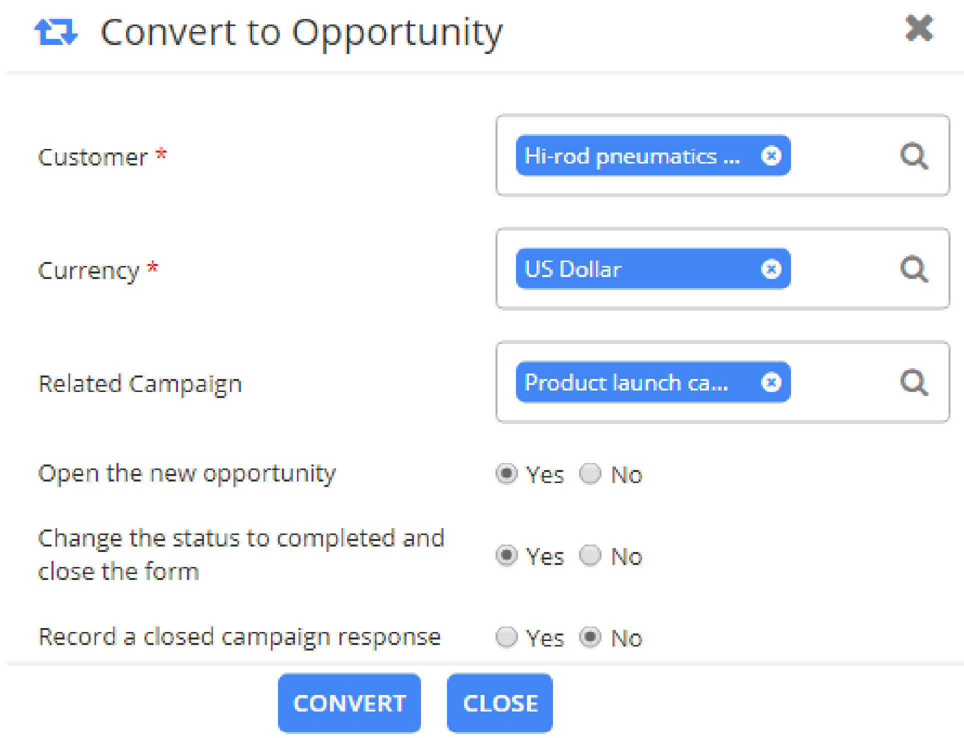
Mark as Cancel

- When you click on **Mark as Cancel** button for an activity, a warning message appears. Click "OK" to remove from the calendar and its status will be updated as **Closed** in the CRM.



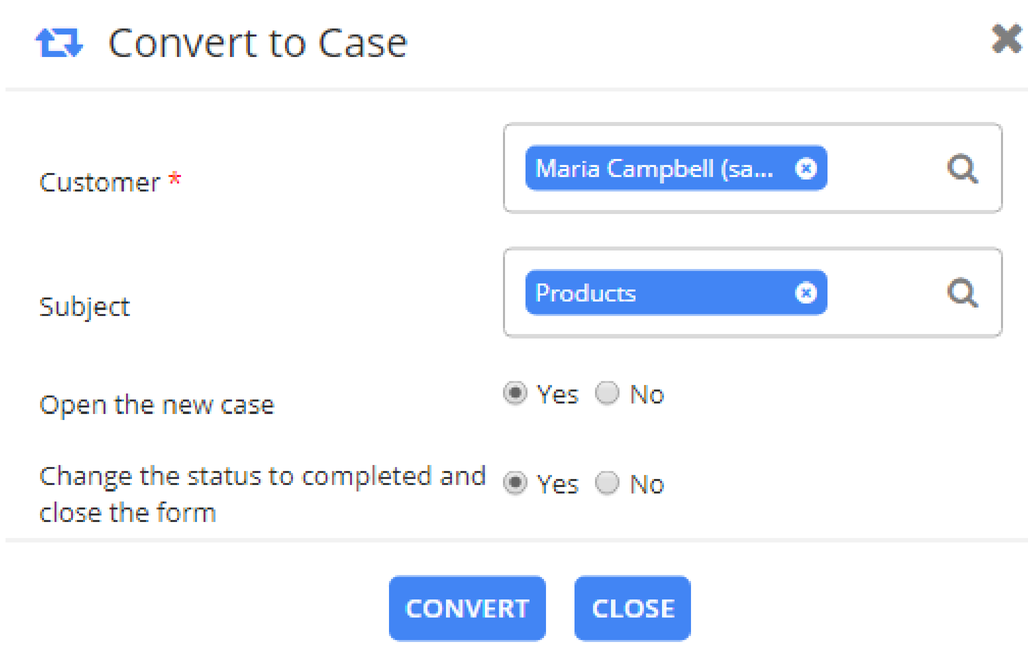
Convert Activity to Opportunity

- Activities like Tasks, Phone calls, Letters, Fax, Custom Activities and Emails can be converted to opportunity from calendar directly.



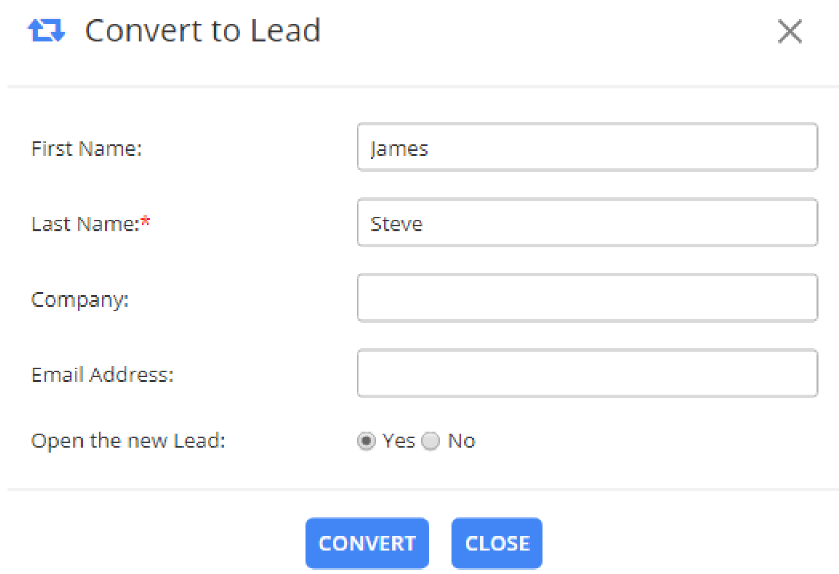
Convert Activity to Case

- Activities like Tasks, Phone calls, Letters, Fax, Custom Activities and Emails can be converted to Case from calendar directly.



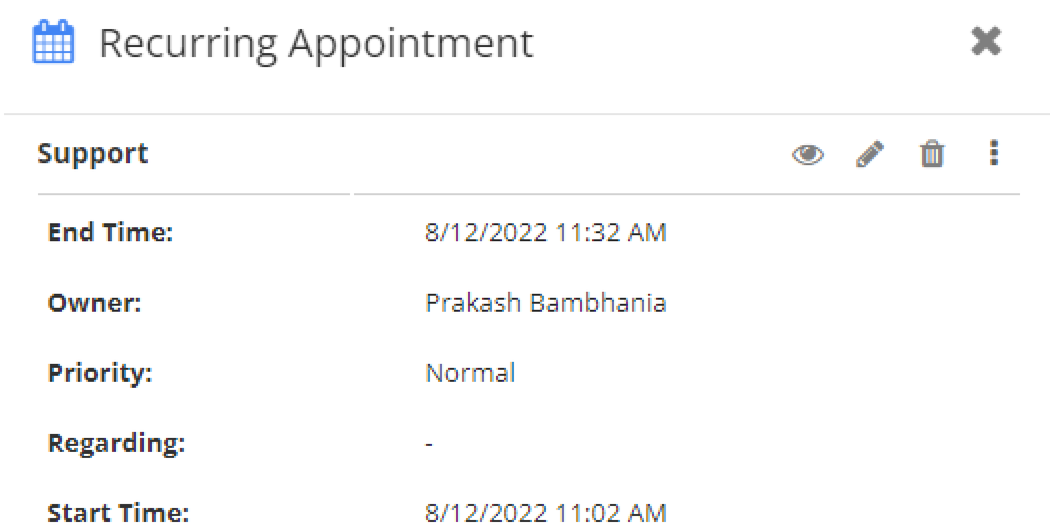
Convert Activity to Lead

- Only **Email** activities can be converted to lead.

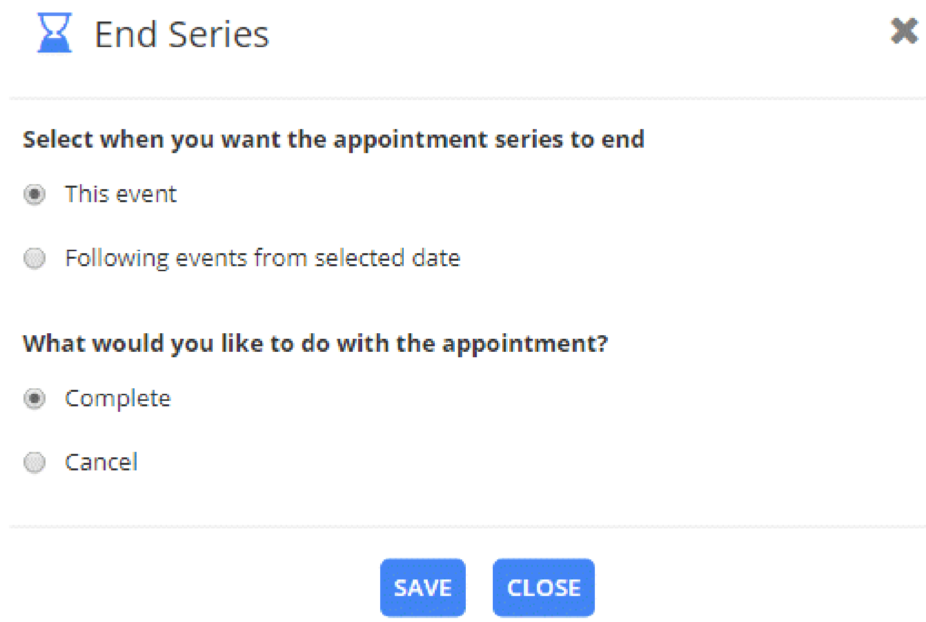


End Series

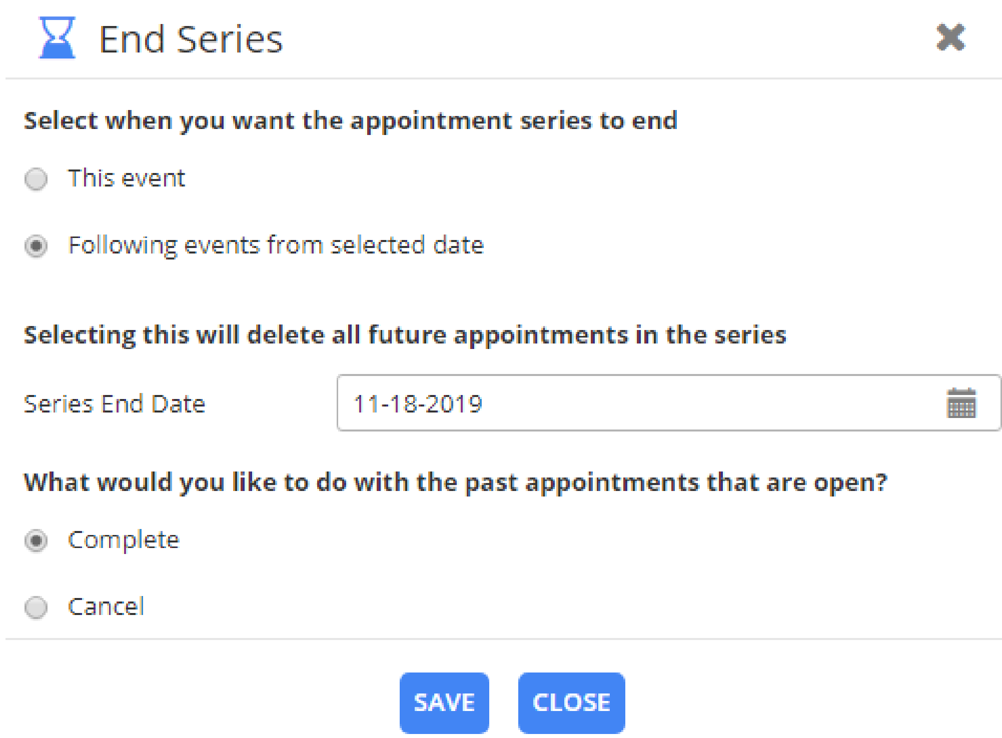
- End series option is available in case of **recurring appointment**.



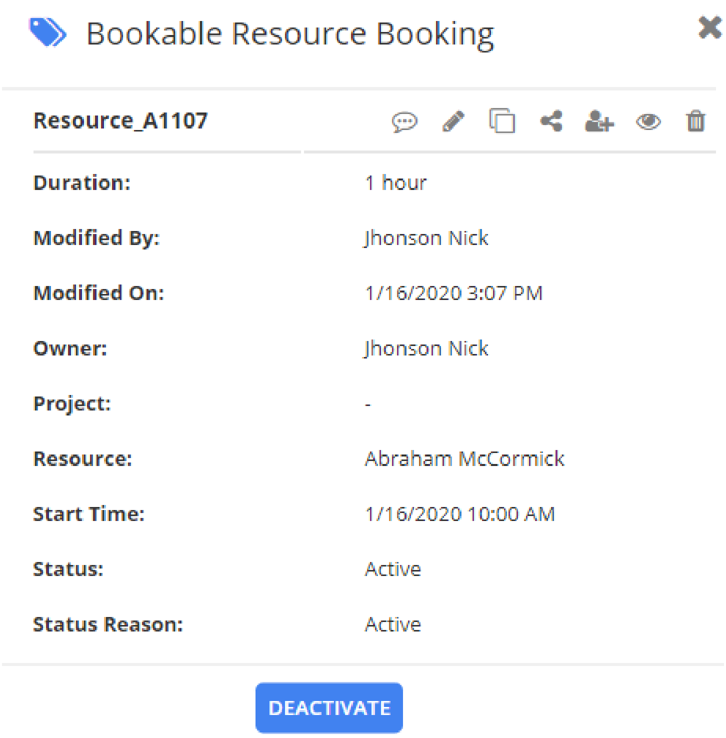
- On clicking End Series button, you need to select when you want appointment series to end. It can be either “This event” or “Following events from selected date”.



- If **This Event** option is selected, it ends that appointment by selecting ‘Complete’ or ‘Cancel’ the activity. The status will be updated as per selection of Complete or Cancel.
- Selecting **Following events from selected date** option, you need to select series **end date** and the related status. The status will be updated as per selection of Complete or Cancel.



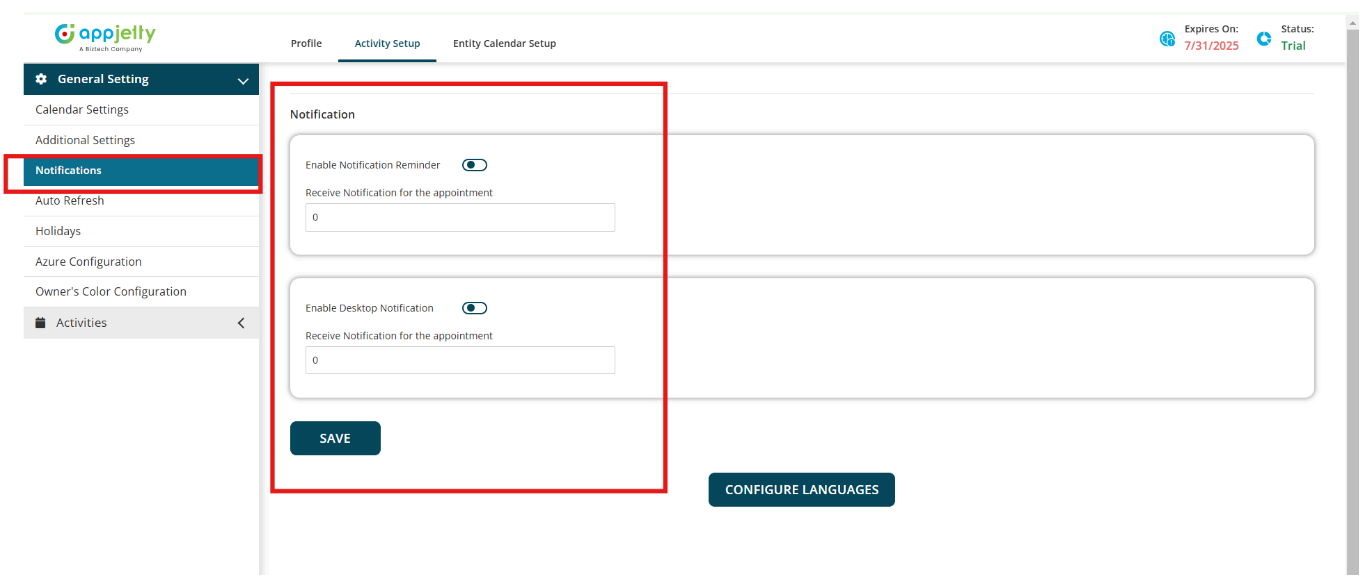
Deactivate Bookable Resource Booking



- By clicking on Bookable Resource activity, the details of Bookable Resource will appear.
- You can Deactivate the Bookable Resource Booking by clicking on **Deactivate** button.

Reminder of Activity:

- You will receive a notification for reminder of the activity before few minutes from the start time of the activity set from the backend default configurations.



A Biztech Company

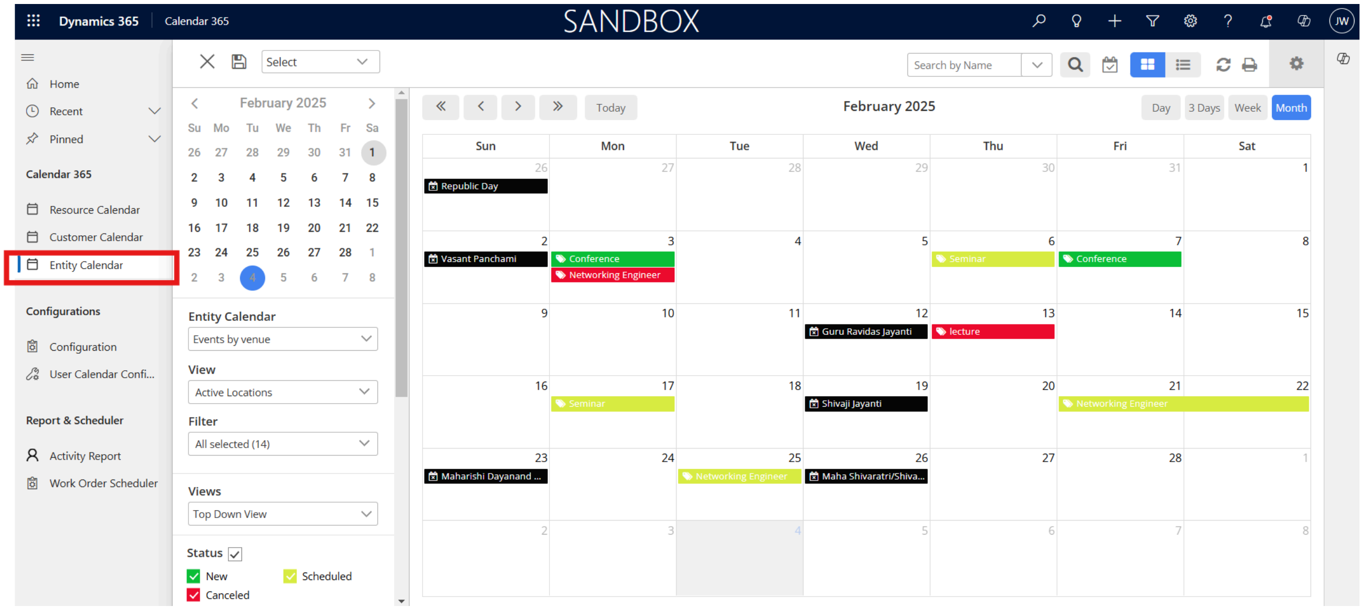
Reminder

Event Type:	Task
Event:	Technical analysis & Product enhancement
Start Date:	11/19/2019 3:10 PM
End Date:	11/19/2019 8:10 PM
Resource:	Juan Carlos

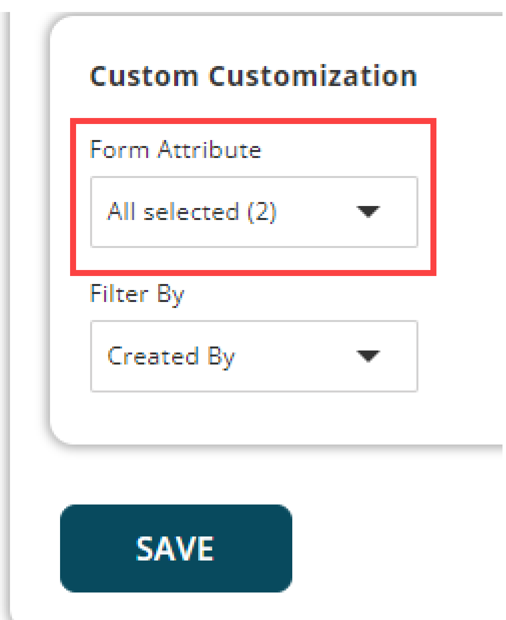
OK

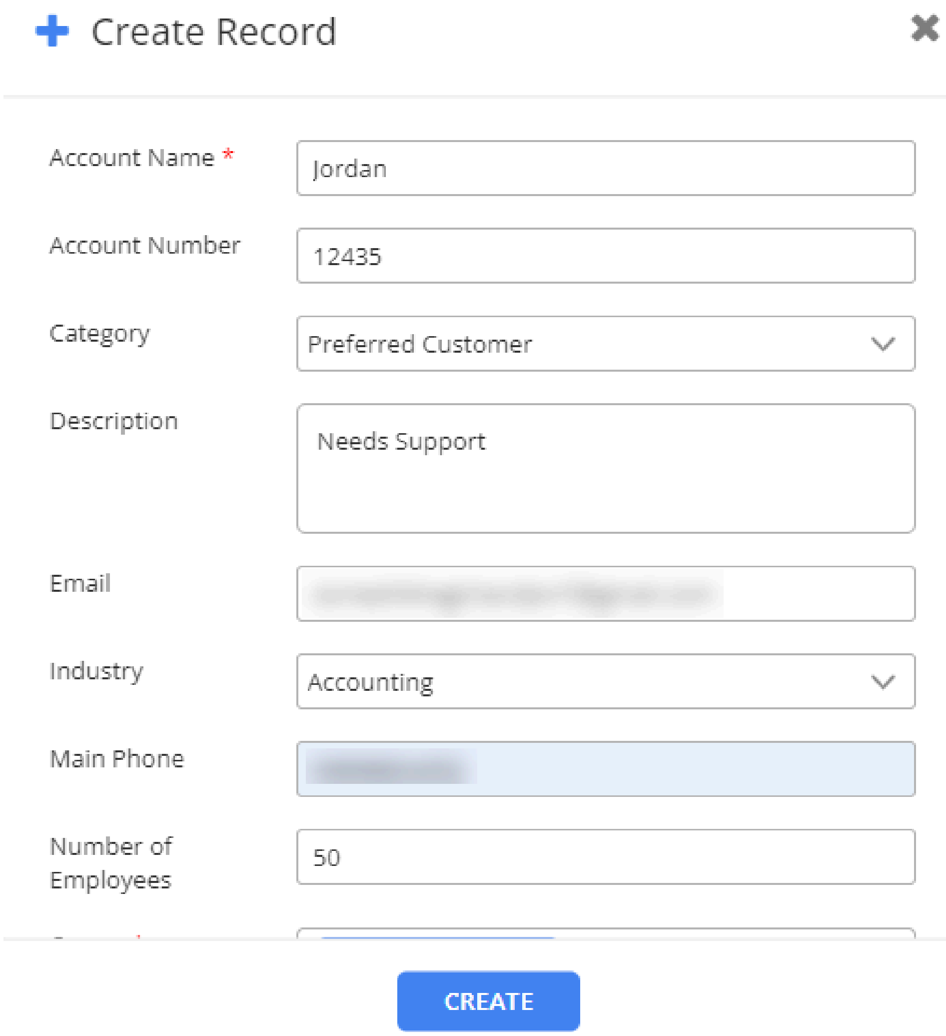
Create Entity Records

- To create records, navigate to the Entity Calendar and click on the date on the calendar that you want to add the record to.

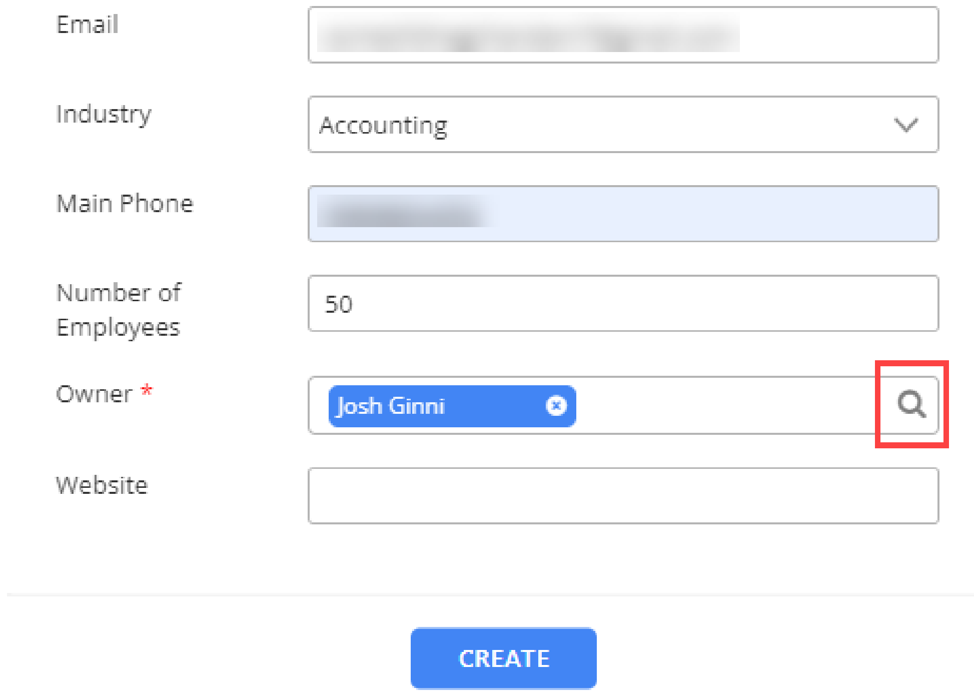


- As you click on the date, a “Create Record” popup will appear on your screen.
- You need to select the required record from the list. You will get the list of the entity fields as enabled from the calendar configuration (Form Attributes).

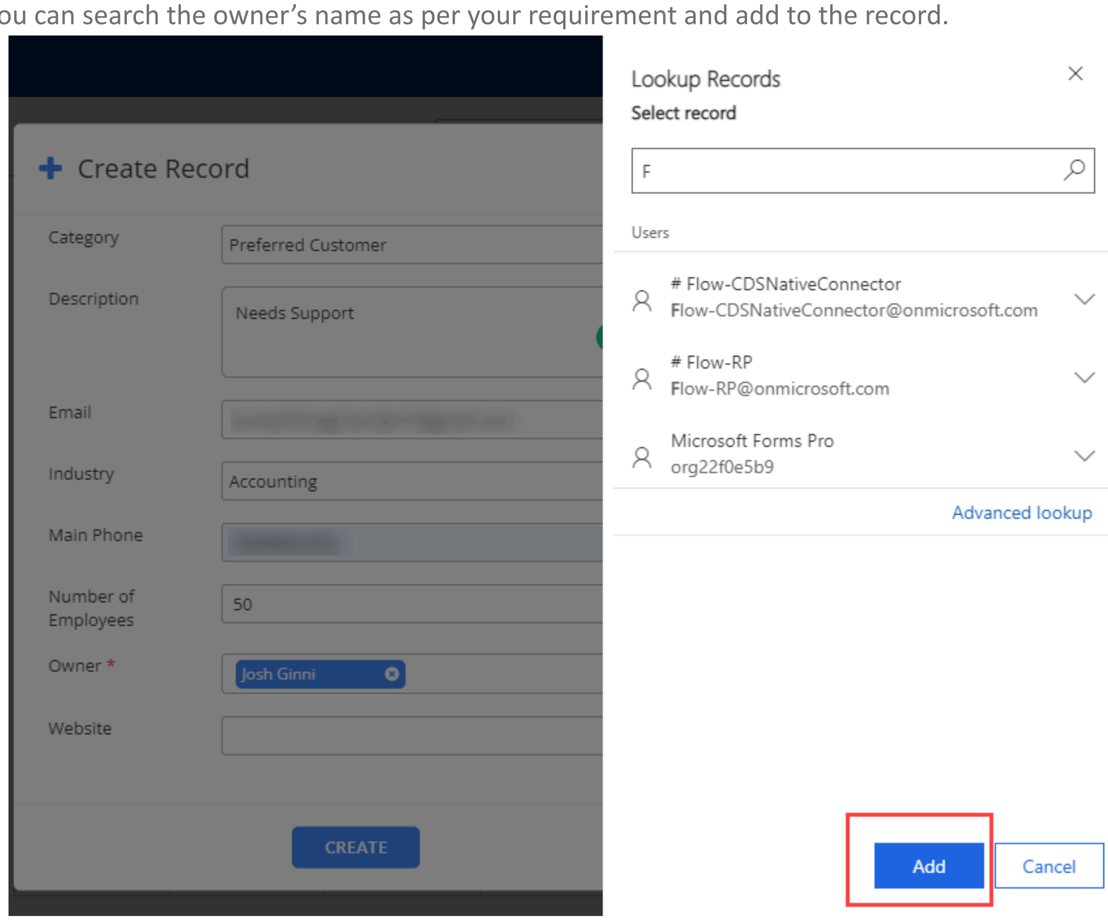




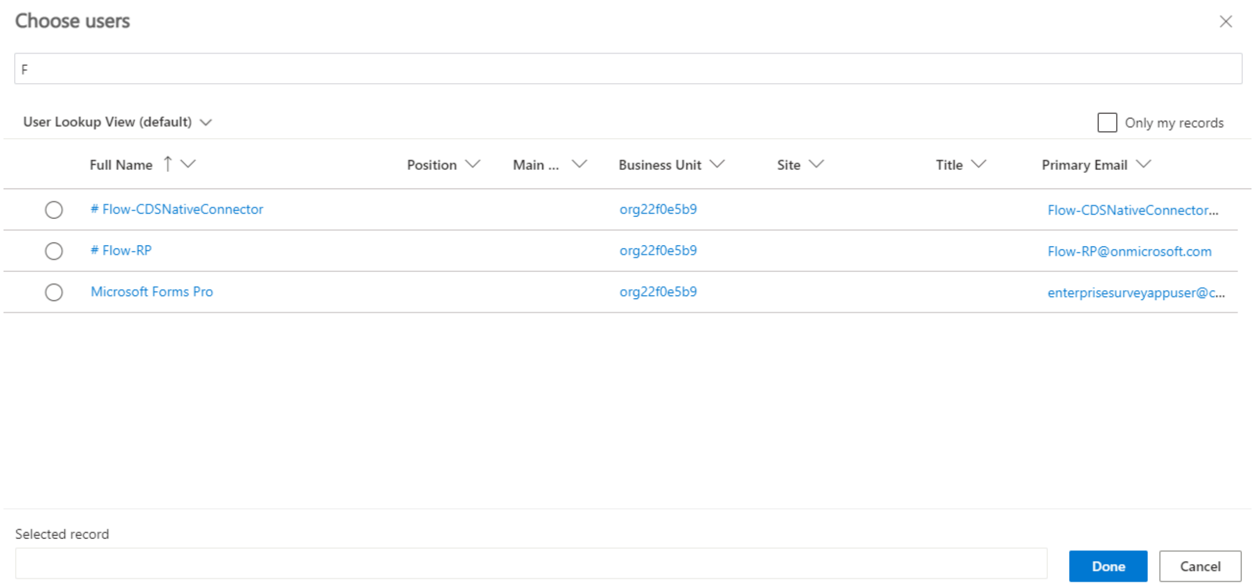
- **Account Name**: Enter the account name.
- **Account Number**: Enter the account number.
- **Category**: Select the category of the record.
- **Description**: Enter the description as per your requirement.
- **Email**: Enter the email address of the record.
- **Industry**: Select the industry of the record.
- **Main Phone**: Enter the main phone number of the record.
- **Number of Employees**: Enter the number of employees.



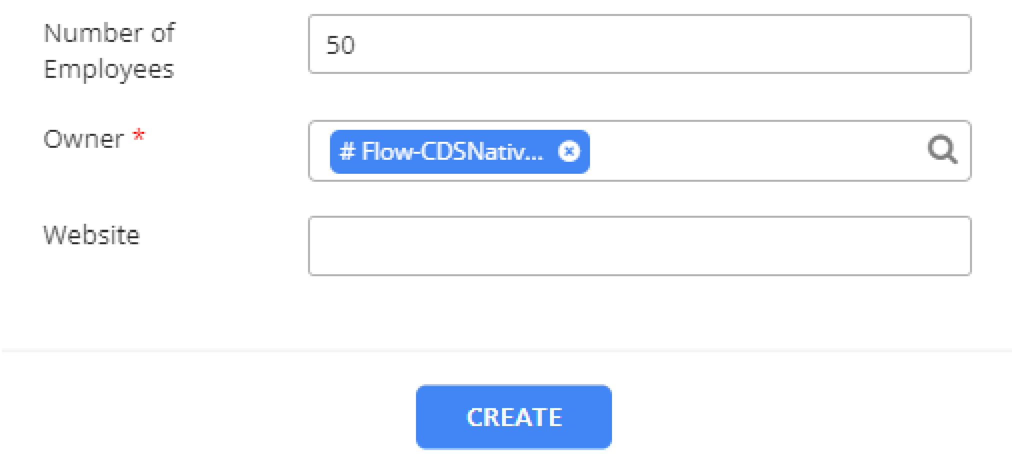
- **Owner**: Owner (Current log in user) will be pre-filled in the record or you can also search for other owners as per your requirement.
- You can search the owner's name as per your requirement and add to the record.



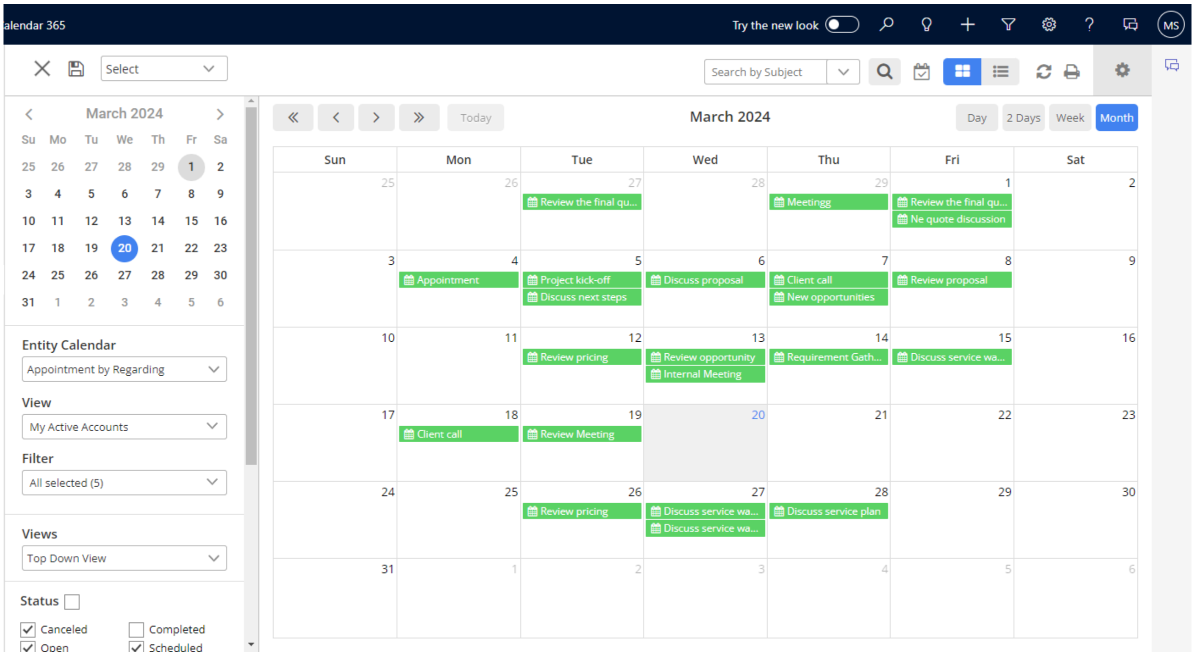
- If you are not getting the user then you can open the Advanced Lookup.



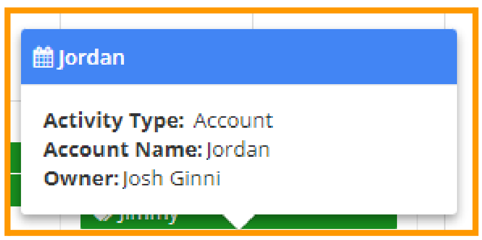
- **Website**: Insert the website of the record.



- After entering the information, click on the **Create** button, if all the information is correct then it will be created on your calendar.

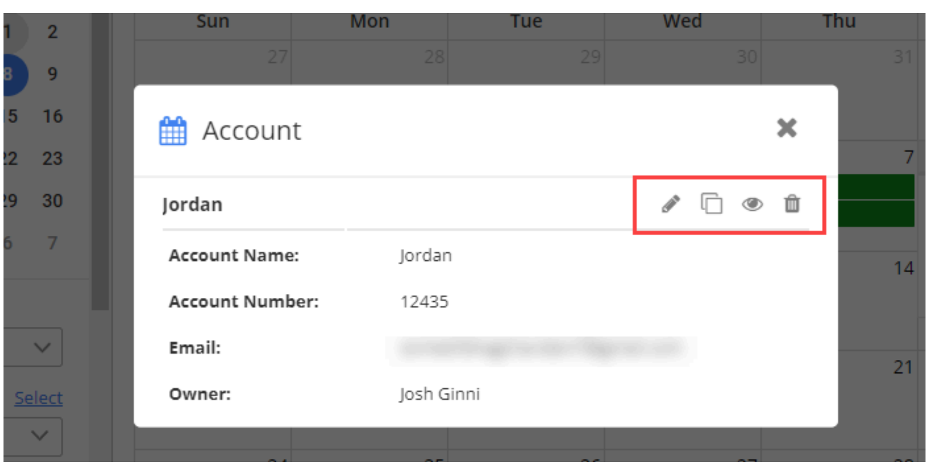


- Now you can view the added record on the calendar.



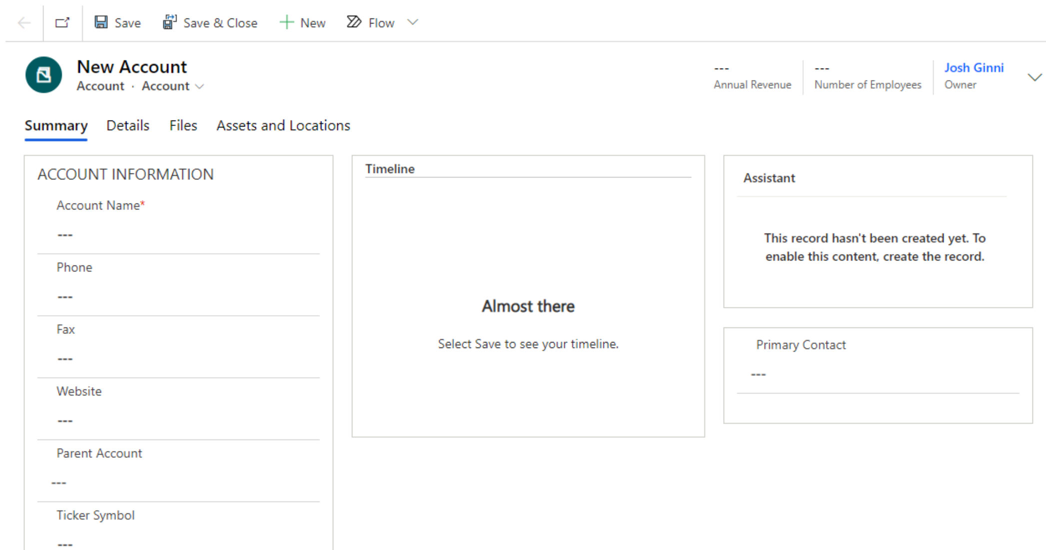
- You can also view the detail of the created record by hovering the mouse over the record. You can also change the field in the detail view as per your requirement from the calendar configuration.

Note: You can only display up to ten fields in the detail view.



Quick Create Activity (CRM Form)

- If you have enabled **Quick Create Form** option from **Calendar Configuration ➢ Advanced Settings**, you will get the CRM backend view (CRM Form View) to create the activity.



- After inserting and selecting the required details, the activity will be created.

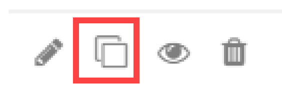
Edit Record

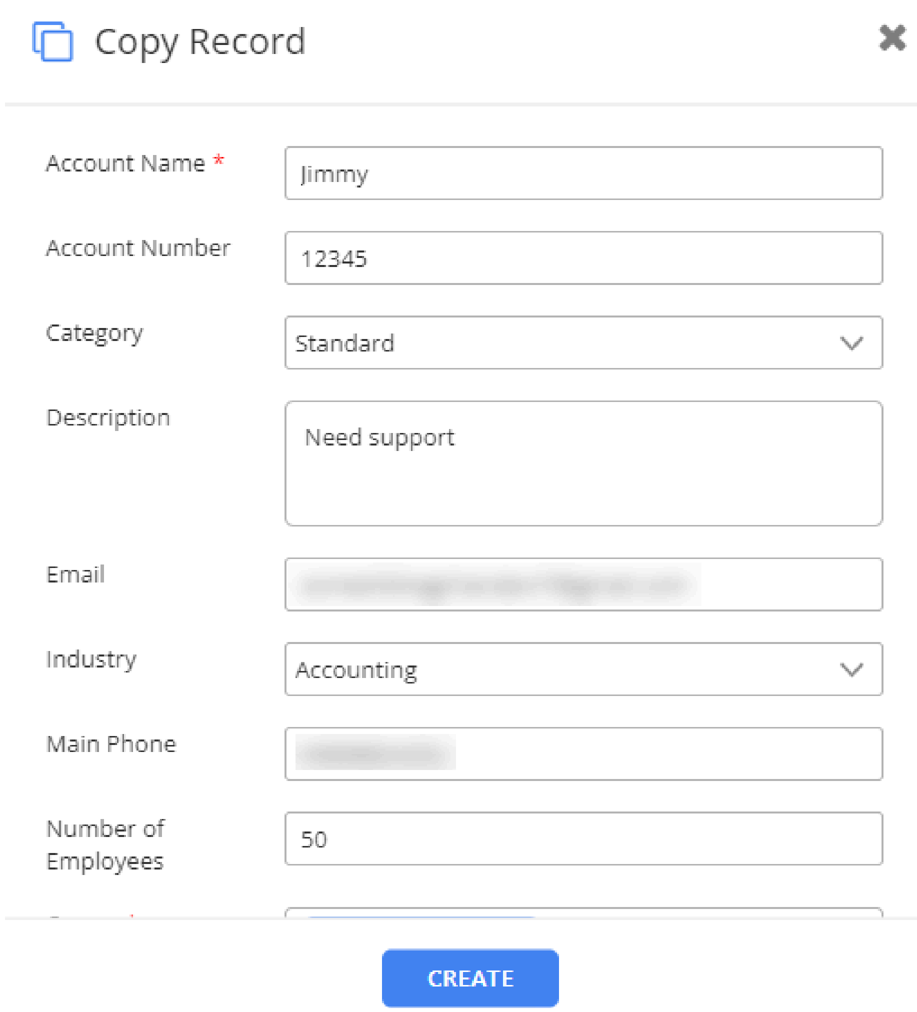
- Click on 'Edit' icon to edit any created activity.

- On clicking the edit icon, it opens activity details in the edit view.
- Update or change the details and then click on the Update button to save changes to the activity.

Copy Record

- Click on copy event icon, to copy activity details. Clicking on copy icon you can edit all the details if required.

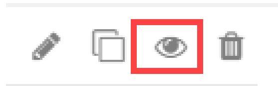


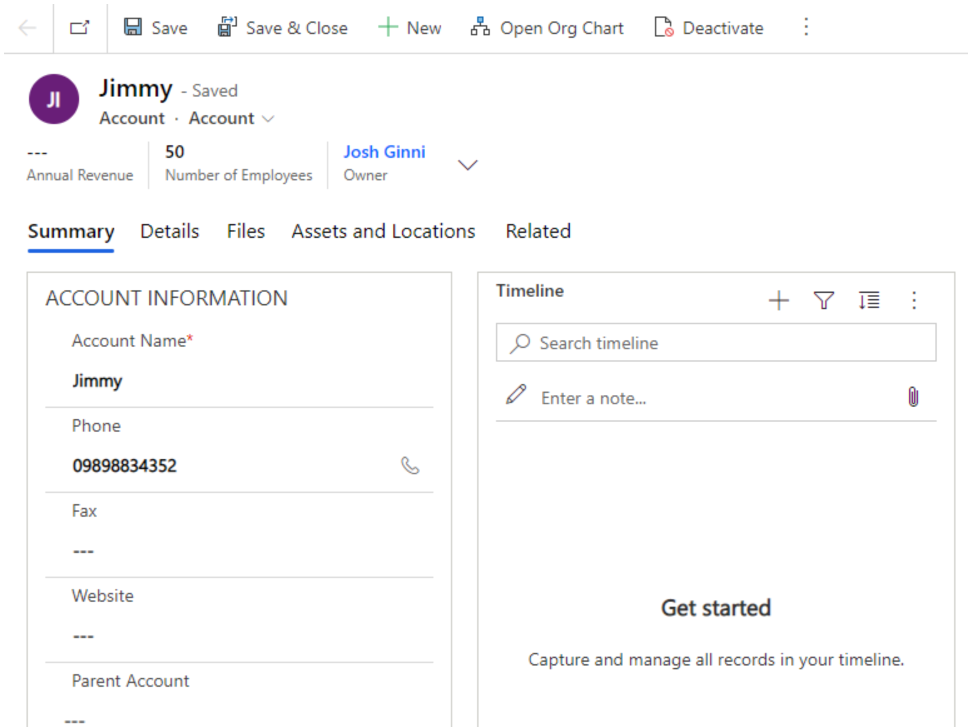


- Click on **Create** button to create a duplicate of the record.

View Record

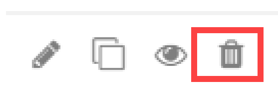
- Clicking on the 'View' icon, the record will be shown on the CRM page with all the details.



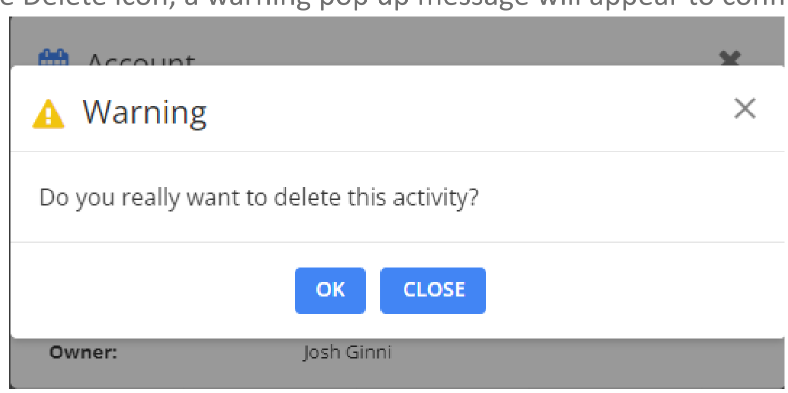


Delete Records

- Clicking on 'Delete' icon, the activity can be deleted from the Calendar page permanently.



- Clicking on the Delete icon, a warning pop up message will appear to confirm the action.

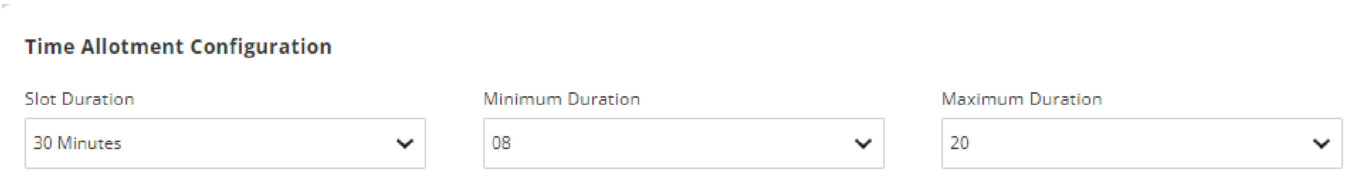


Calendar Views

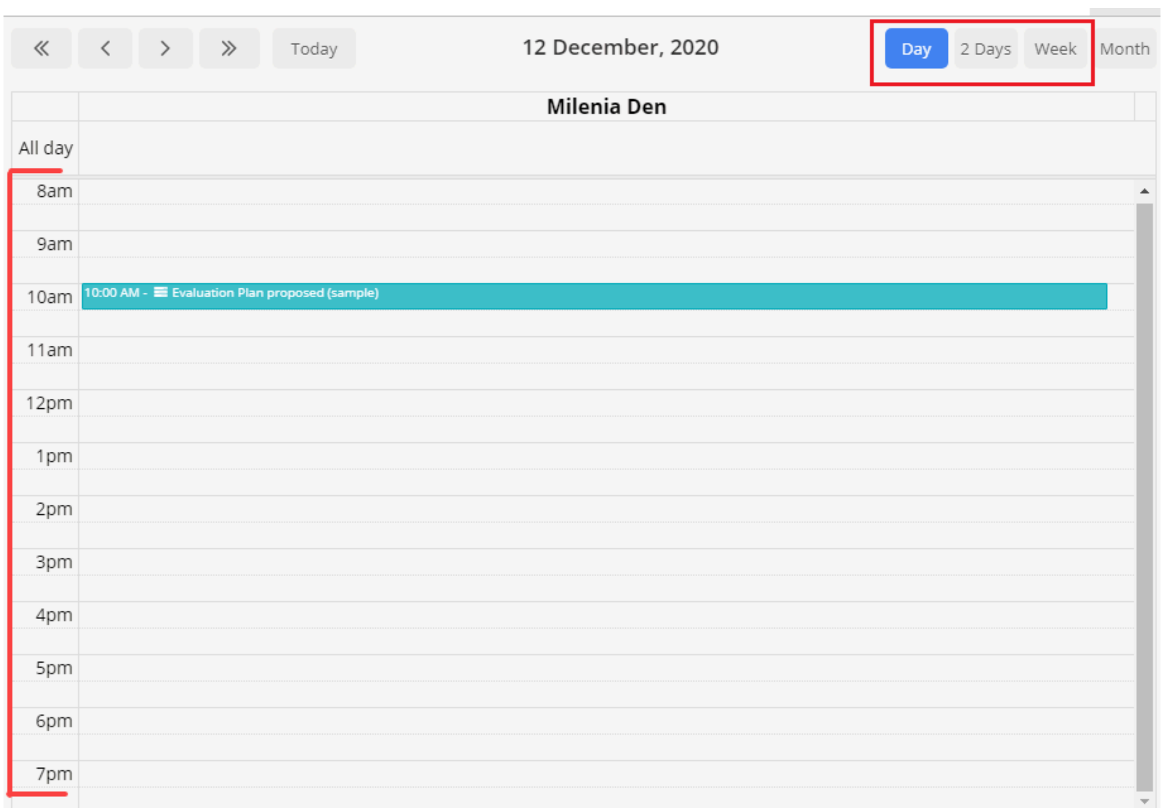
- There are multiple views given in the Calendar 365 to check the activities and as per the schedule.

Time Slot Duration View

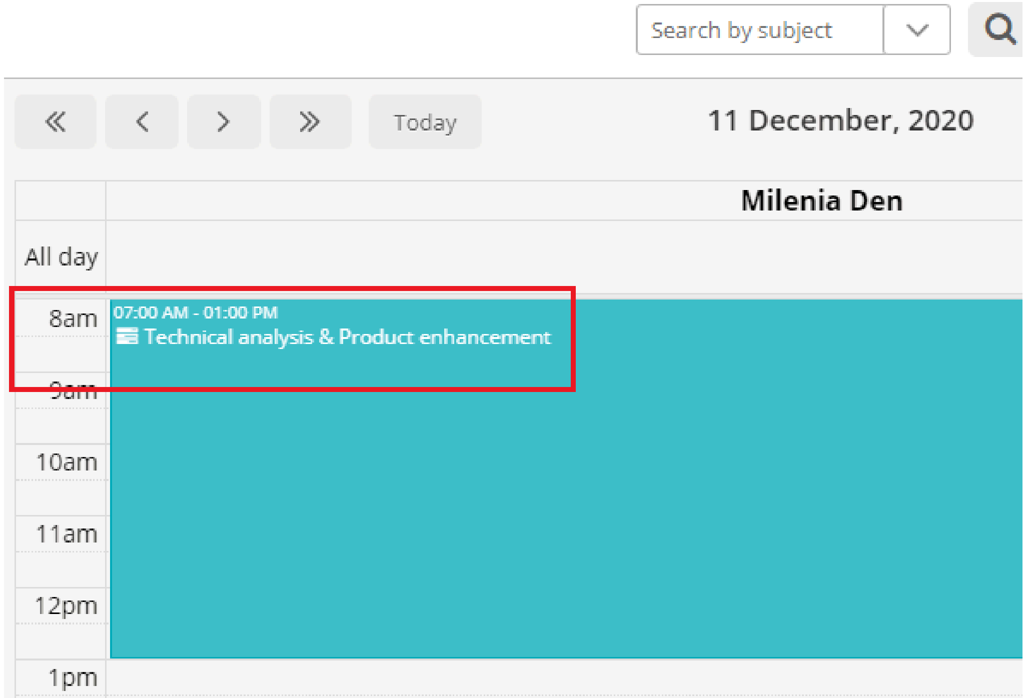
- If you have set the “Slot Duration”, “Minimum,” & “Maximum” time slots from the default configuration of Calendar 365, the users will see the working Time slots on the Calendar page.



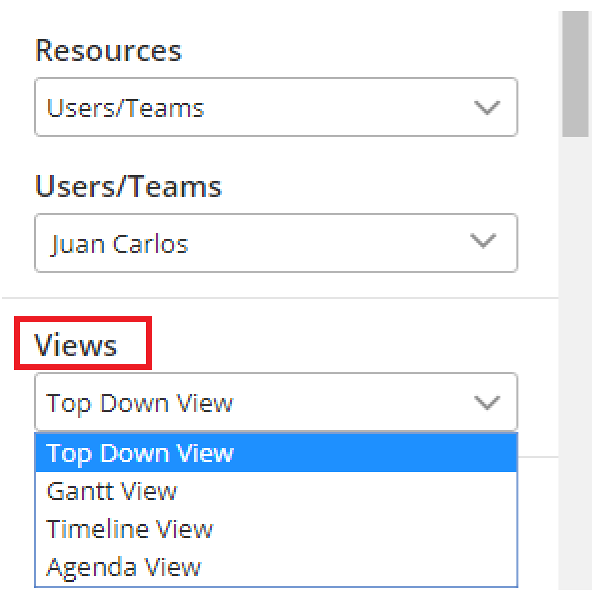
- The Time slot duration can only be seen for Days & Weeks. By setting the time slots, you can decide the availability and working time for any activity.



- Suppose if any activity is added before the time slot or after the time slot, it will allow and display the time with the activity title .



- The individual different Views also provided to check the calendar activities and plan accordingly.



- There are four types of views of Calendar 365 and they are as follows:
  - Top Down View
  - Gantt View
  - Timeline View
  - Agenda View

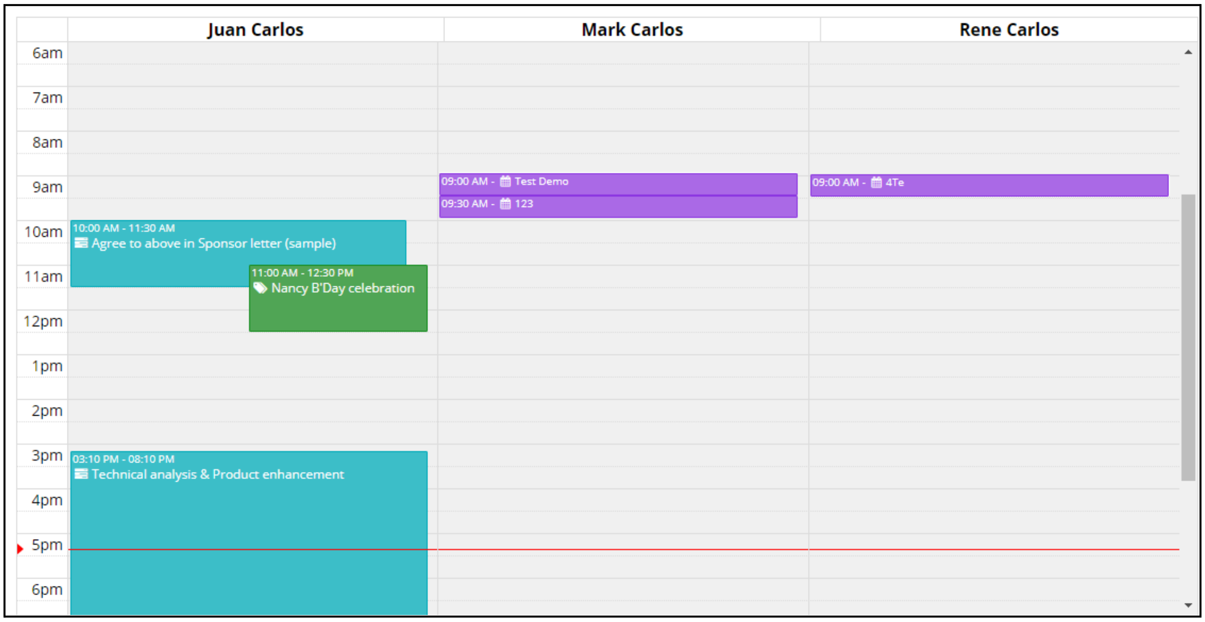
Note: You can check all Calendar Views in Resource Calendar and Customer Calendars individually.

Top Down View

- This view provides you a Top Down view of the calendar in which you can view a column per member on the horizontal axis and time on the vertical axis, and a plain view of activities. Members can be user/team, account, contact or facilities/equipment depending on choice selected by you.
- In addition, you can view the calendar in Top Down View as per the Day, and Week view format.

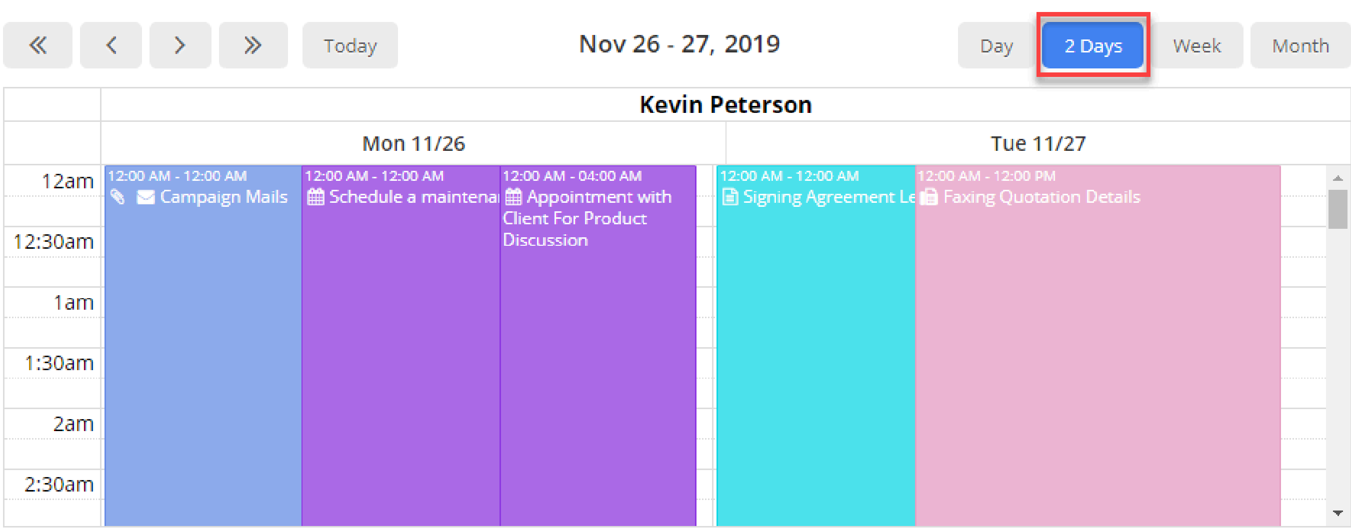
Day View

- You can see the activities for the day in the Top Down View.



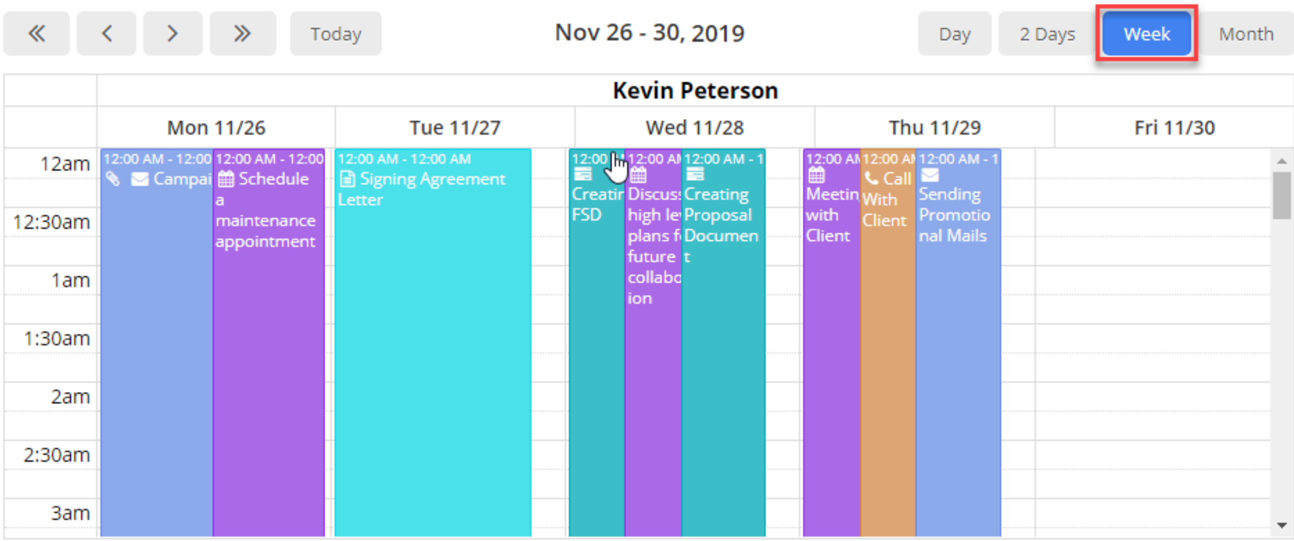
Day Span View

- You can view the calendar as per the configured Number Of Days from default configurations in Day Span View of Top Down view. You can select days from 2 to 5.



Week View

- You can see the activities for the week in the Top Down view.



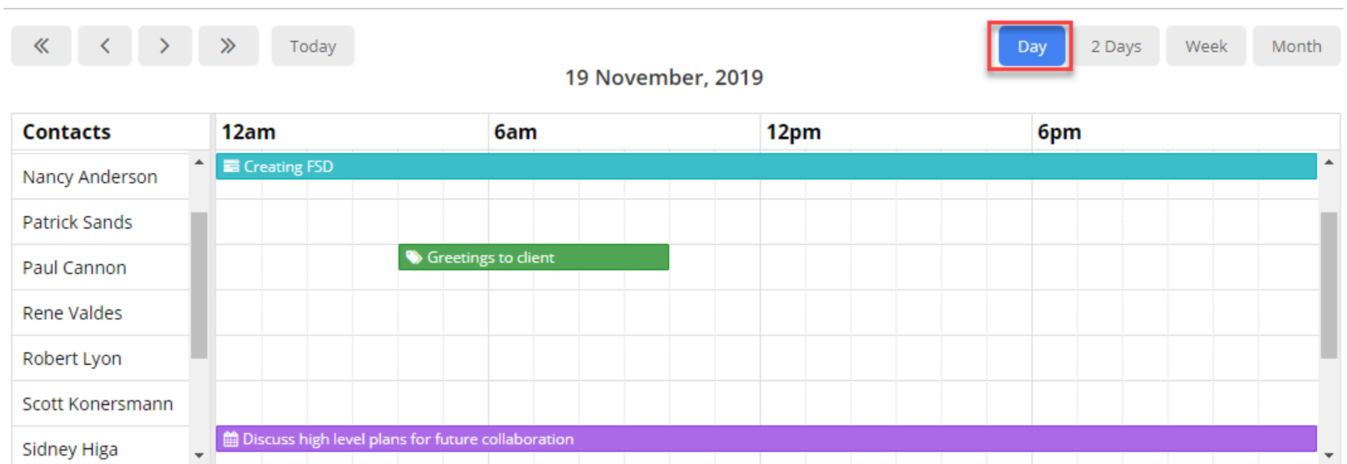
- Similarly, in Month View, you will the details month wise with the dates.

Gantt View

- Gantt view is used for viewing what activity is scheduled to be done at a specific day/time. Gantt view is a horizontal bar chart that visually represents an activity or task with the start and end dates.
- Gantt view in which you can view the Resources or Customers in top down manner and date range in a horizontal display. Here resources can be Team/User & Facilities/Equipment and customers can be Accounts, Contacts, and are displayed based on your selection of calendar view.
- In Gantt view, you can also view all or individual Events (Activities) along with its details like Name of the event, Start date, End date and resource name (As configured to view from the configurations page).
- In addition, you can view the calendar in Gantt View as per the **Day**, **Day Span**, **Week** or **Month format**.

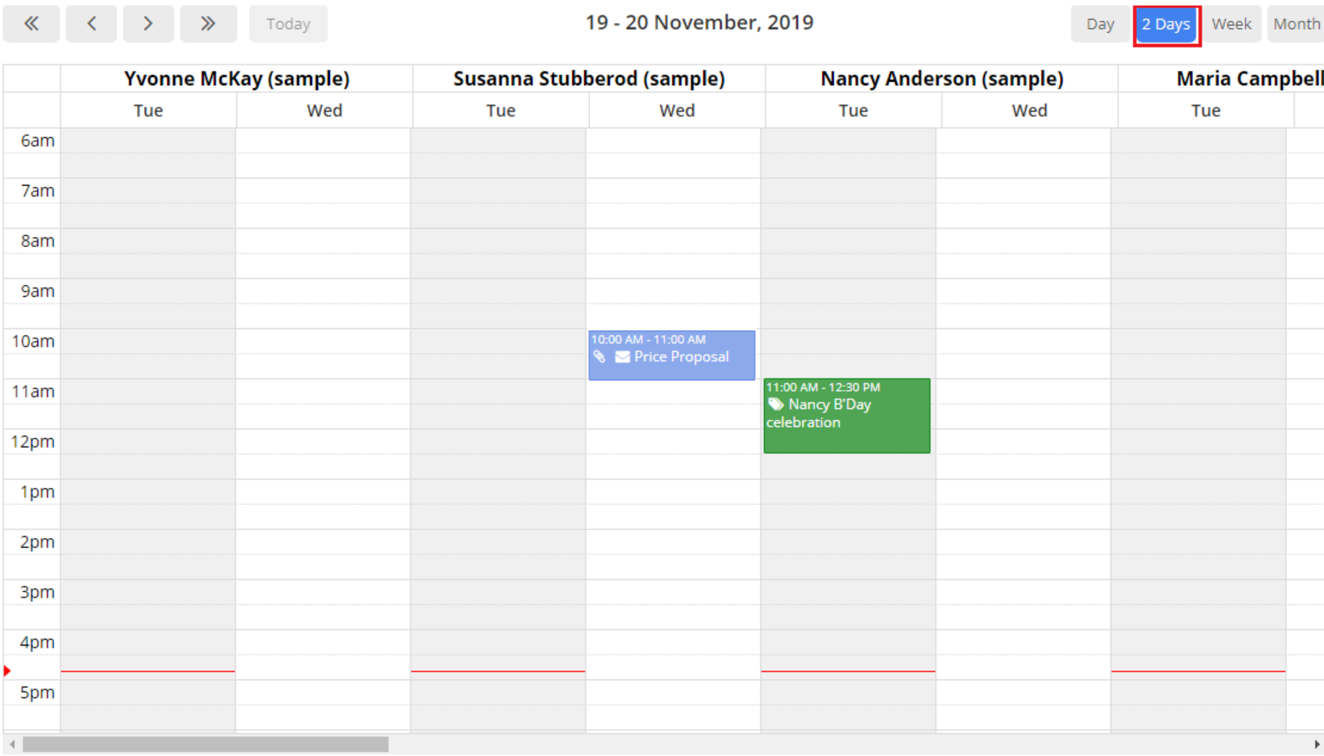
Day View

- You can see the activities for the day in the Gantt view.



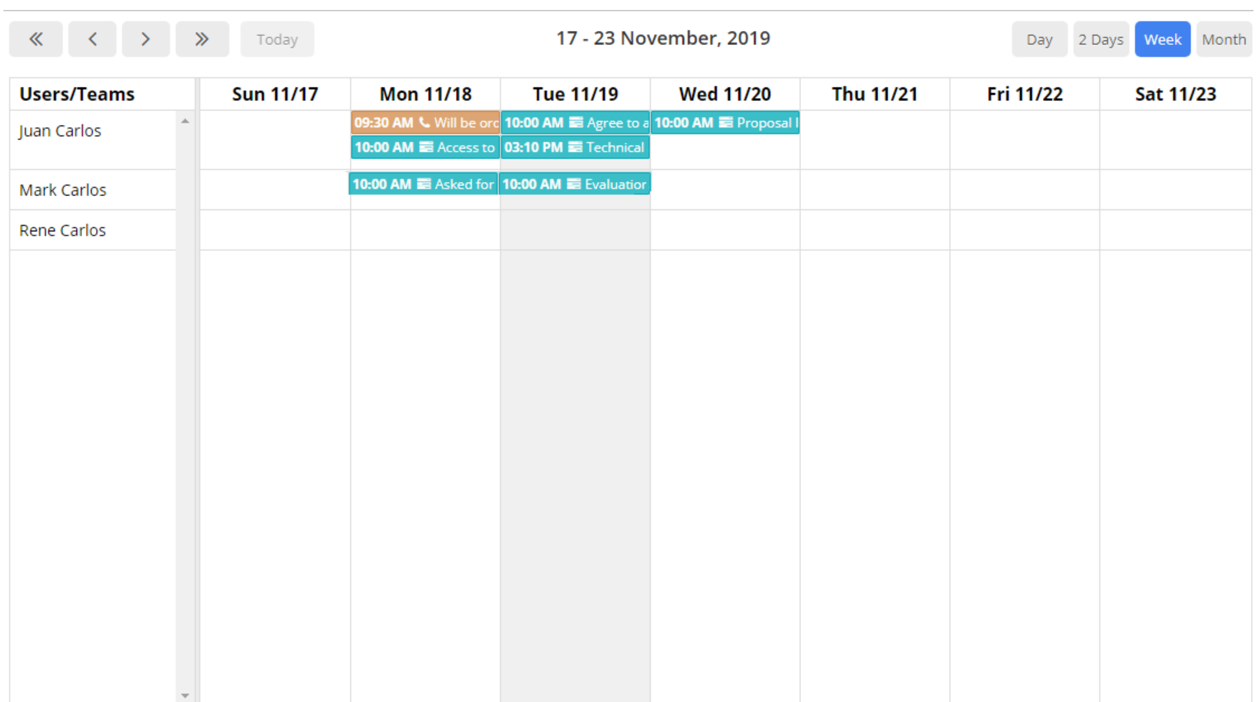
Day Span View

- You can view the calendar as per the configured Number Of Days from default configurations in Gantt View.



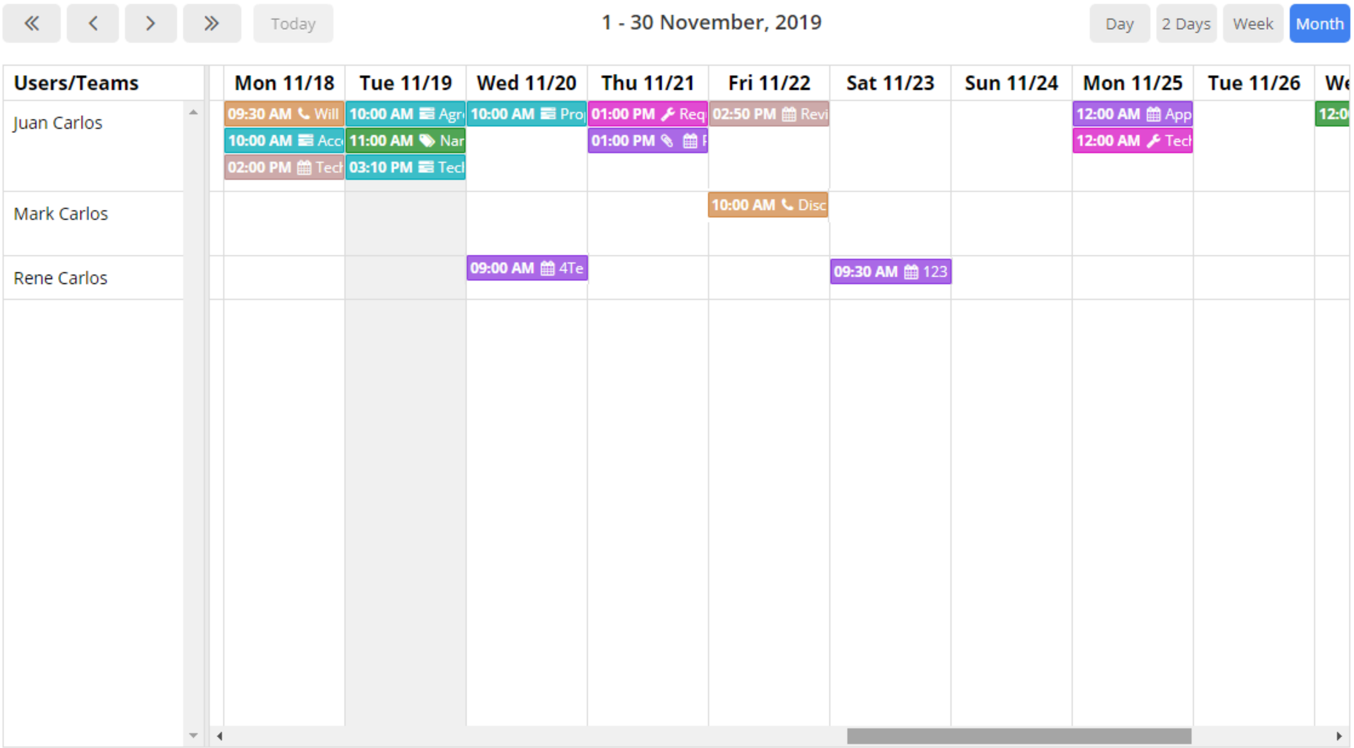
Week View

- You can see the activities for the week in the Gantt View.



Month View

- You can see the activities for the month in the Gantt View.

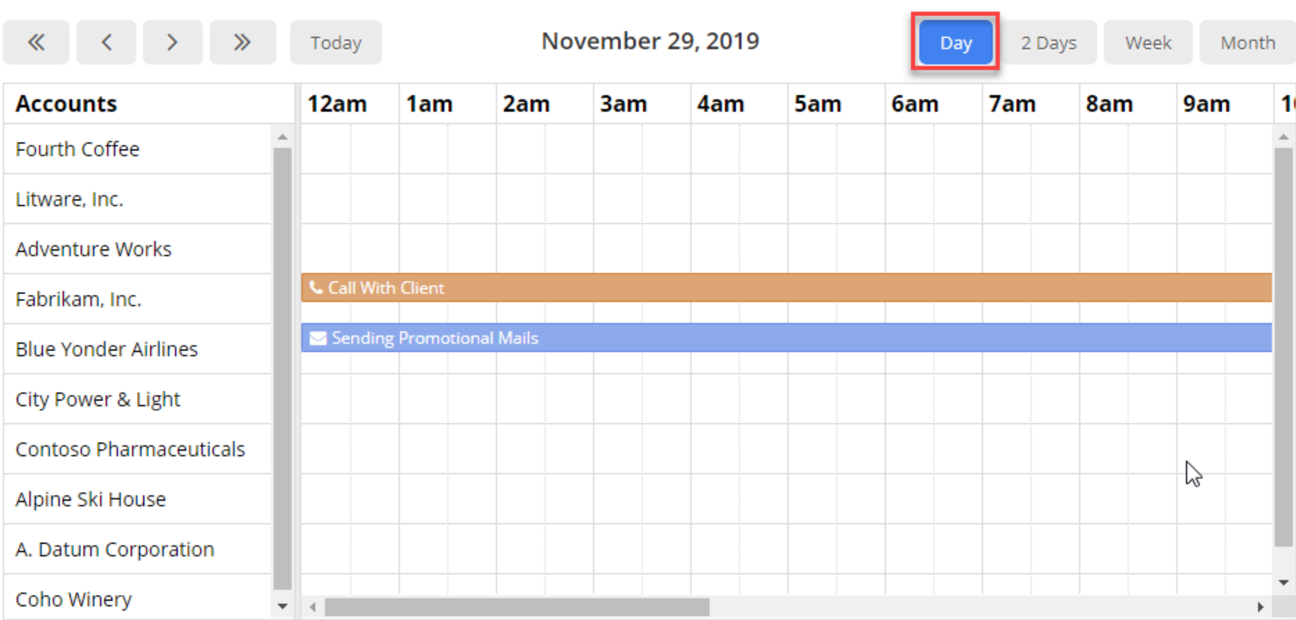


Timeline View

- This view provides you a Timeline view of the calendar in which you can view the simple sequential overview of the calendar- separated by day and the selection of the Users/Teams & Facility/Equipment in Resource Calendar and Accounts, Contacts in Customer Calendar.
- In addition, you can view the calendar in Timeline View as per the Day, Week or Month format.

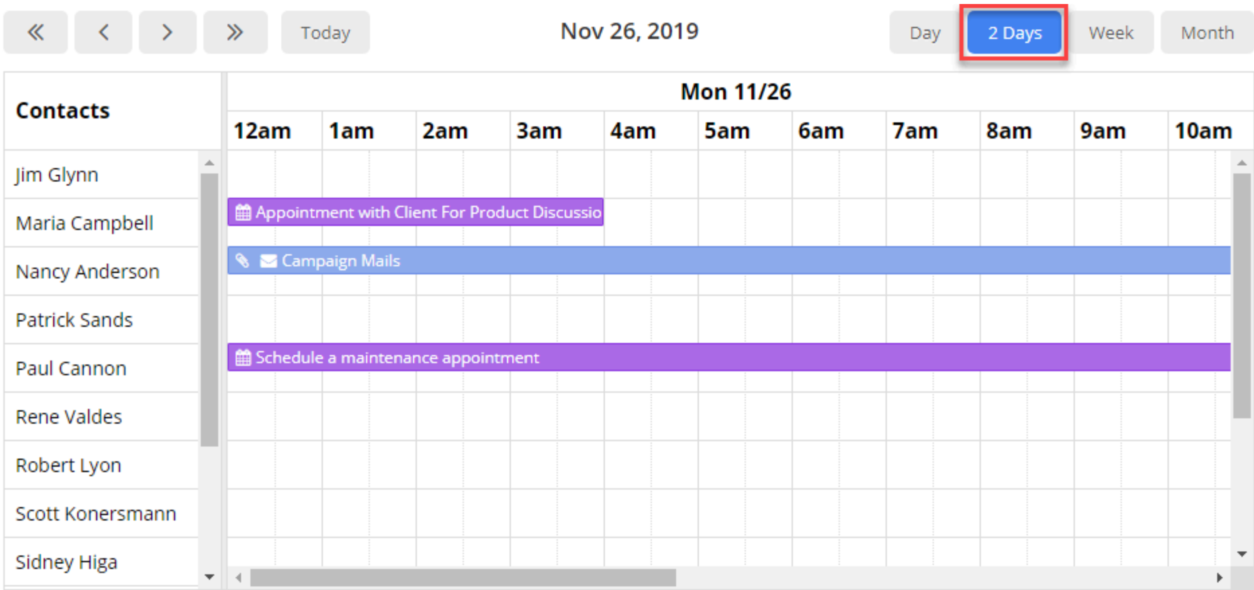
Day View

- You can see the activities for the day in the Timeline view.



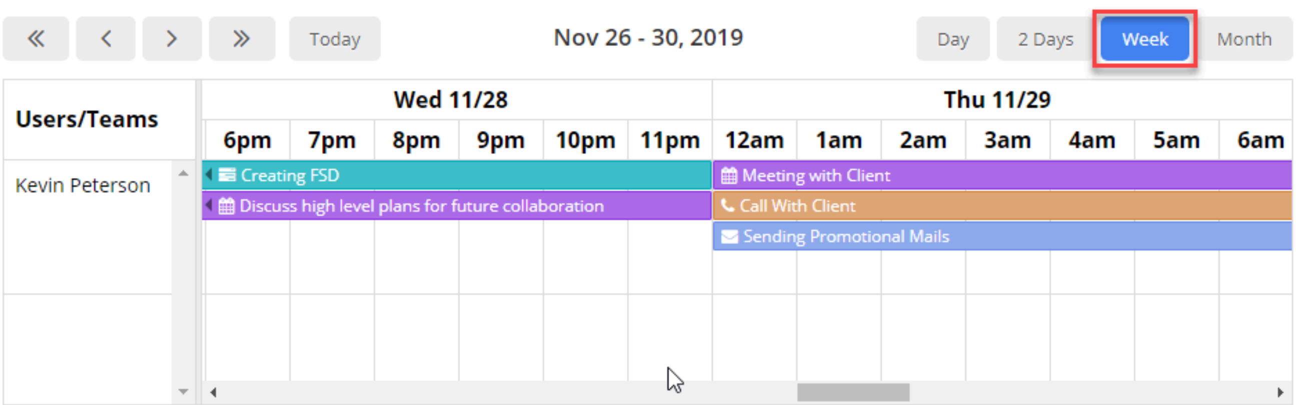
Day Span View

- You can view the calendar as per the configured number of days from Default Configurations in Day Span View.



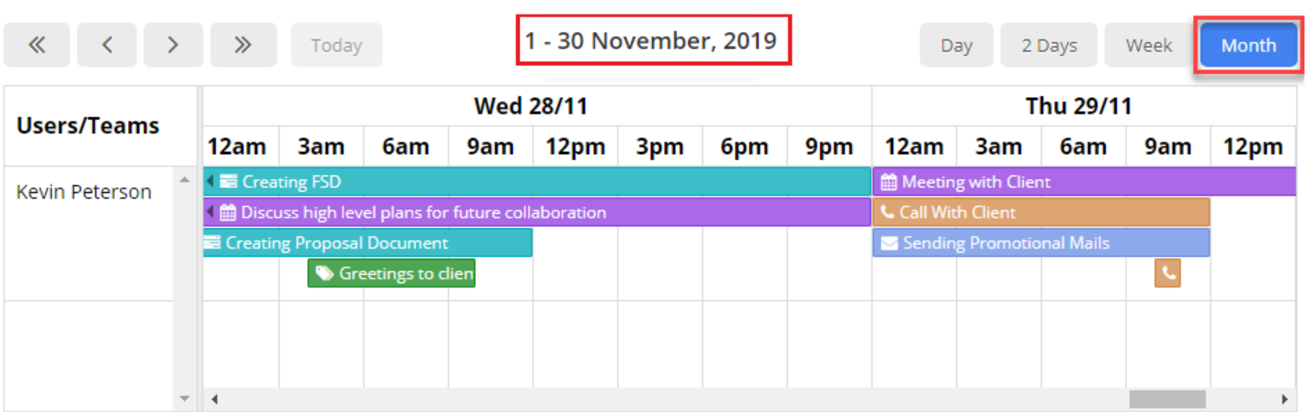
Week View

- You can see the activities for the week in the Timeline view.



Month View

- You can see the activities for the month in the Timeline view.

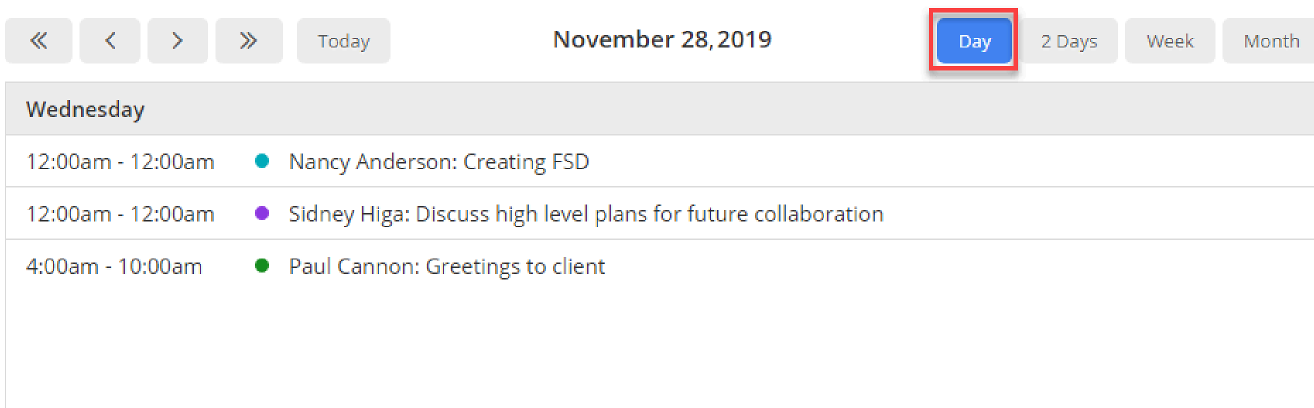


Agenda View

- This view provides you an agenda view of the calendar in which you can view a **sequential list view** with **grouping** options for other resources like accounts, contacts, facilities/equipment or users/teams or by date as per the requirements.
- In addition, you can view the calendar in Timeline View as per the Day, Week or Month format.

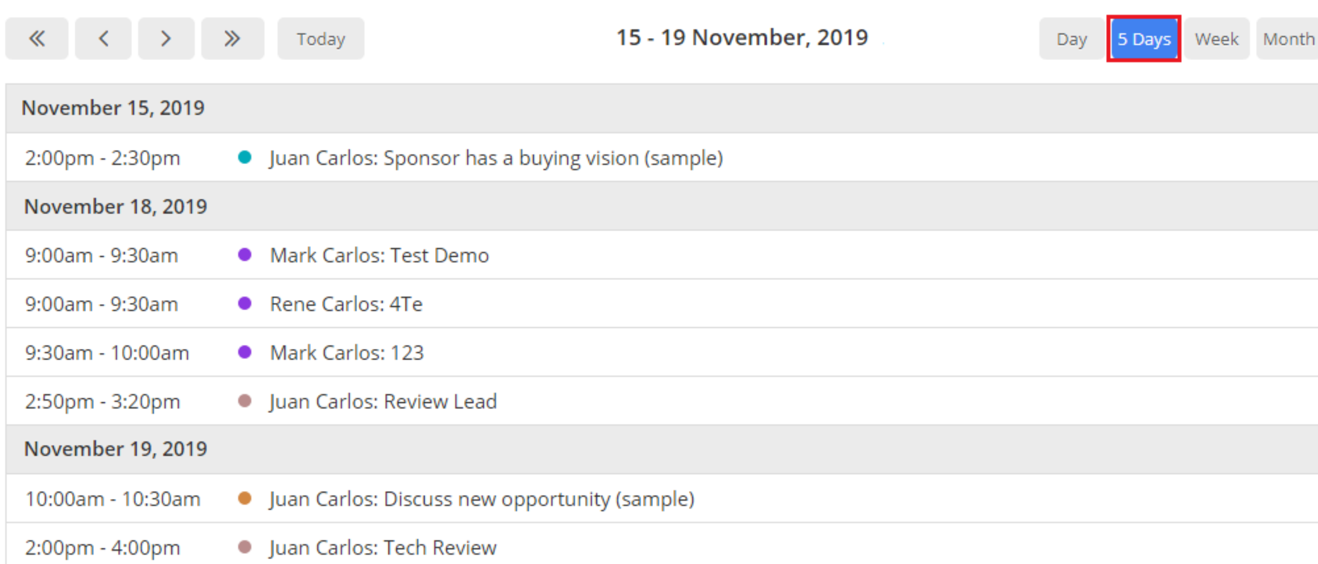
Day View:

- You can see the activities for the day in the agenda view.



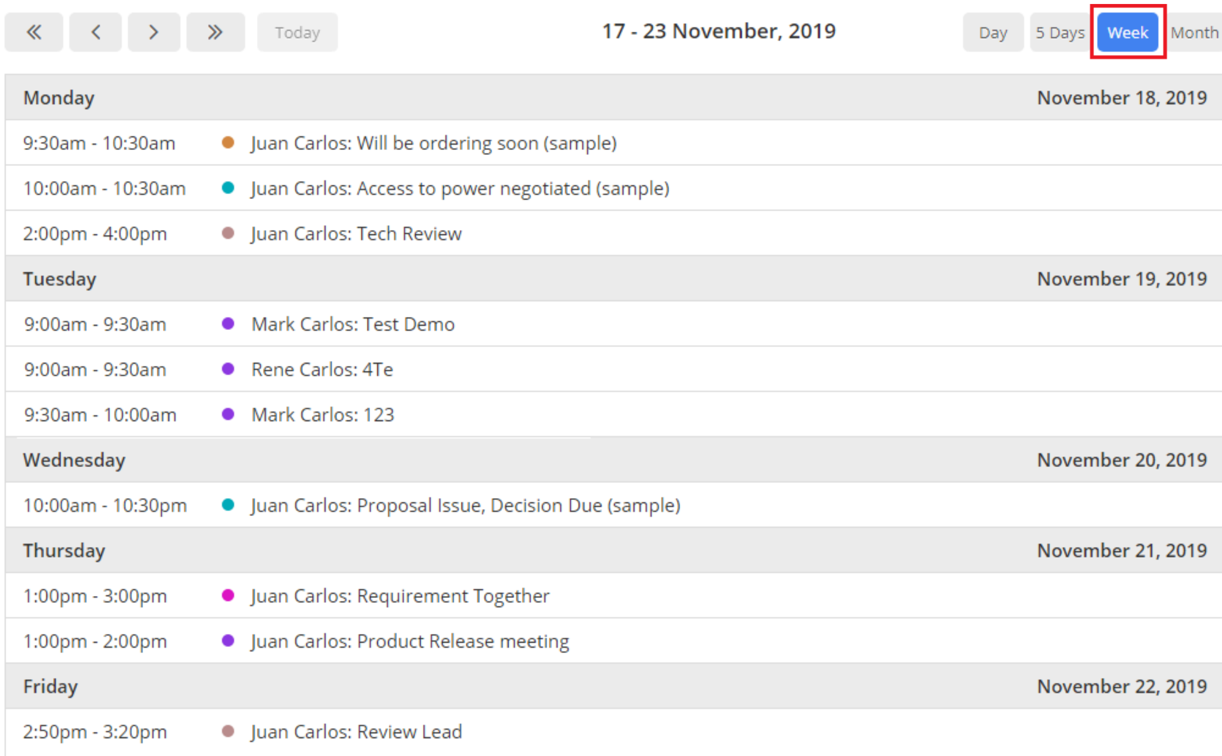
Day Span View:

- You can view the calendar as per the configured number of days from Default Configurations in Agenda View.



Week View:

- You can also see the activities for the week in the agenda view.

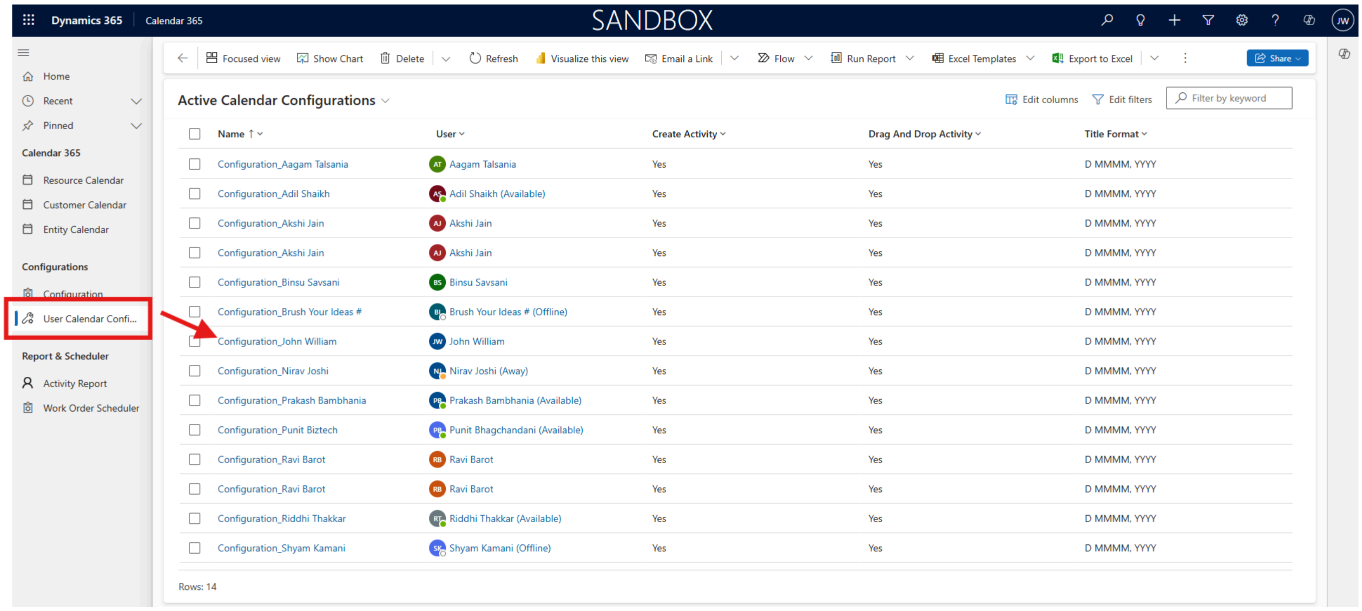


Month View:

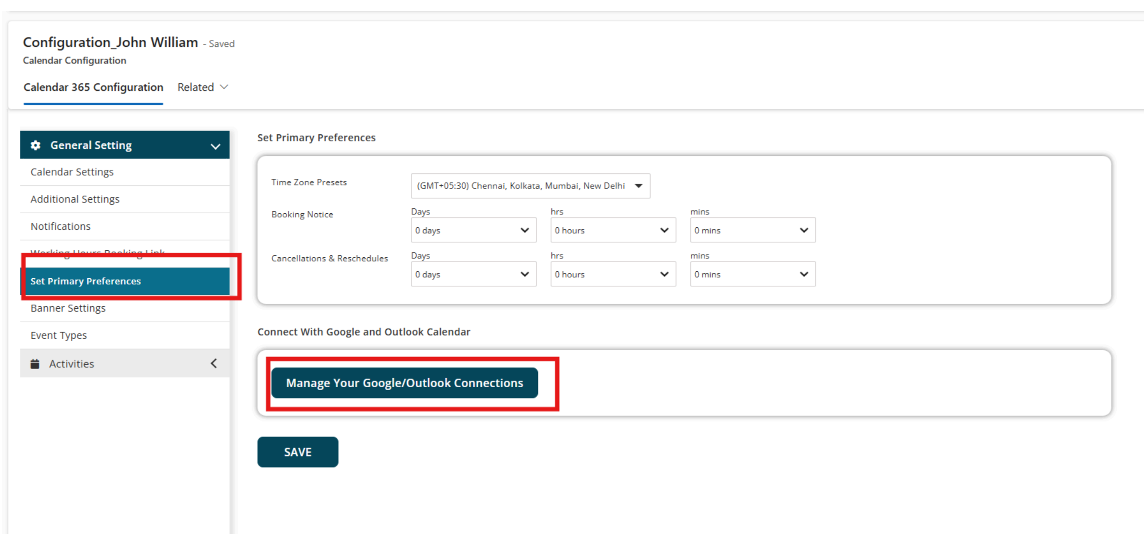
- You can also see the activities for the month in the agenda view.

Two Way Sync - Outlook/Google Calendar

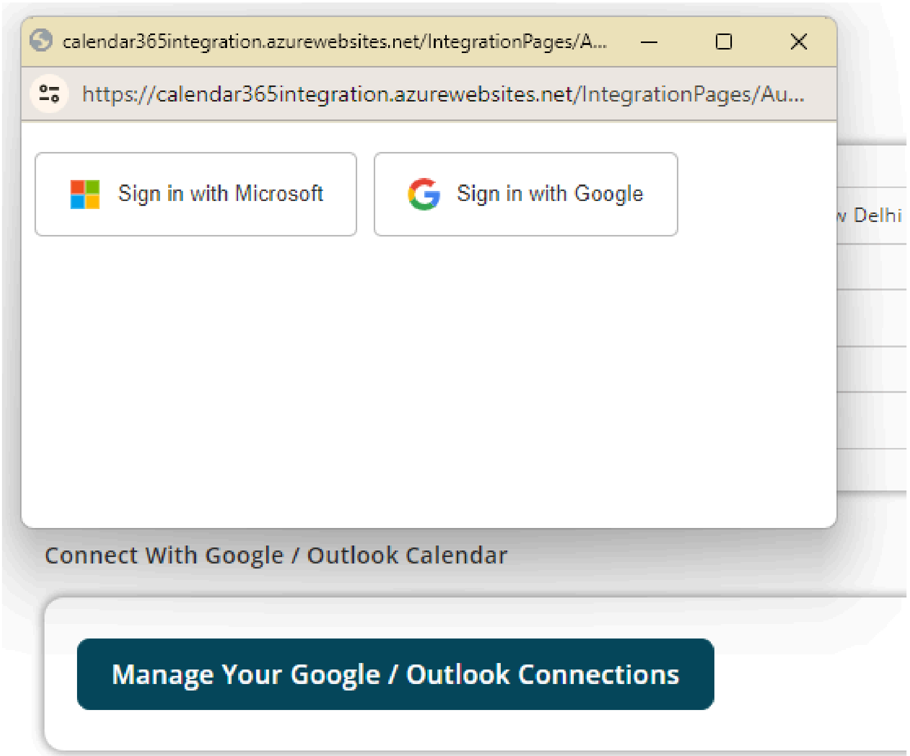
In order to proceed with two way synchronization, you need to navigate to **Configuration and Report -> User Calendar Configuration.**



Clicking on the Name column of the respective user will redirect you to the **Configuration** section of the respective user. There you need to navigate to **General Settings -> Set Primary Preferences -> Connect with Google/Outlook Calendar.**

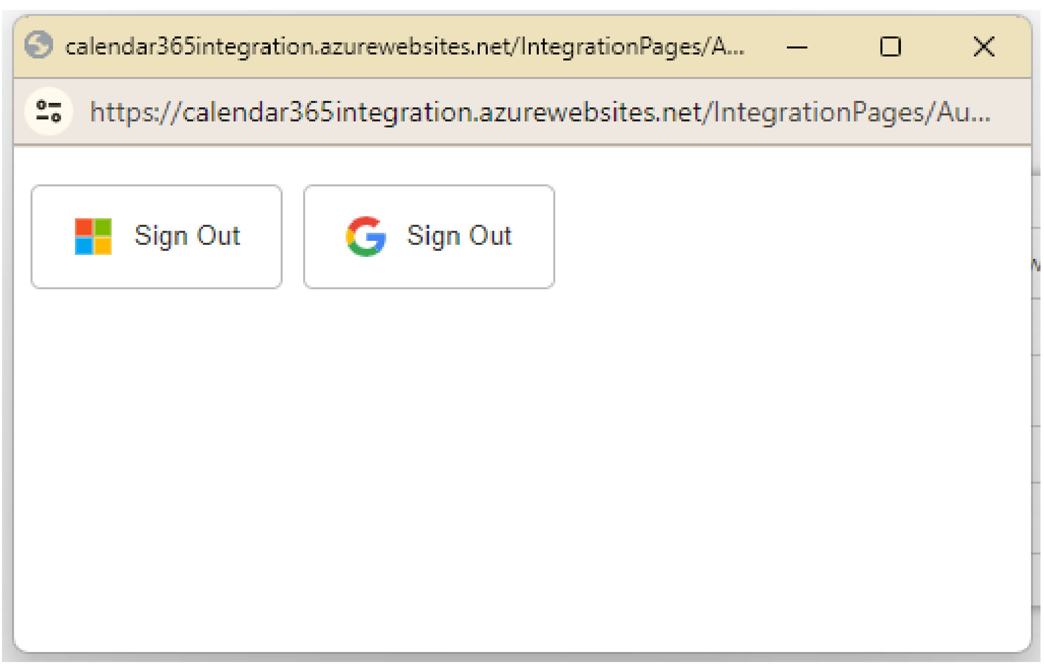


A pop-up will be displayed when clicked on “Manage Your Google/Outlook Connections”.



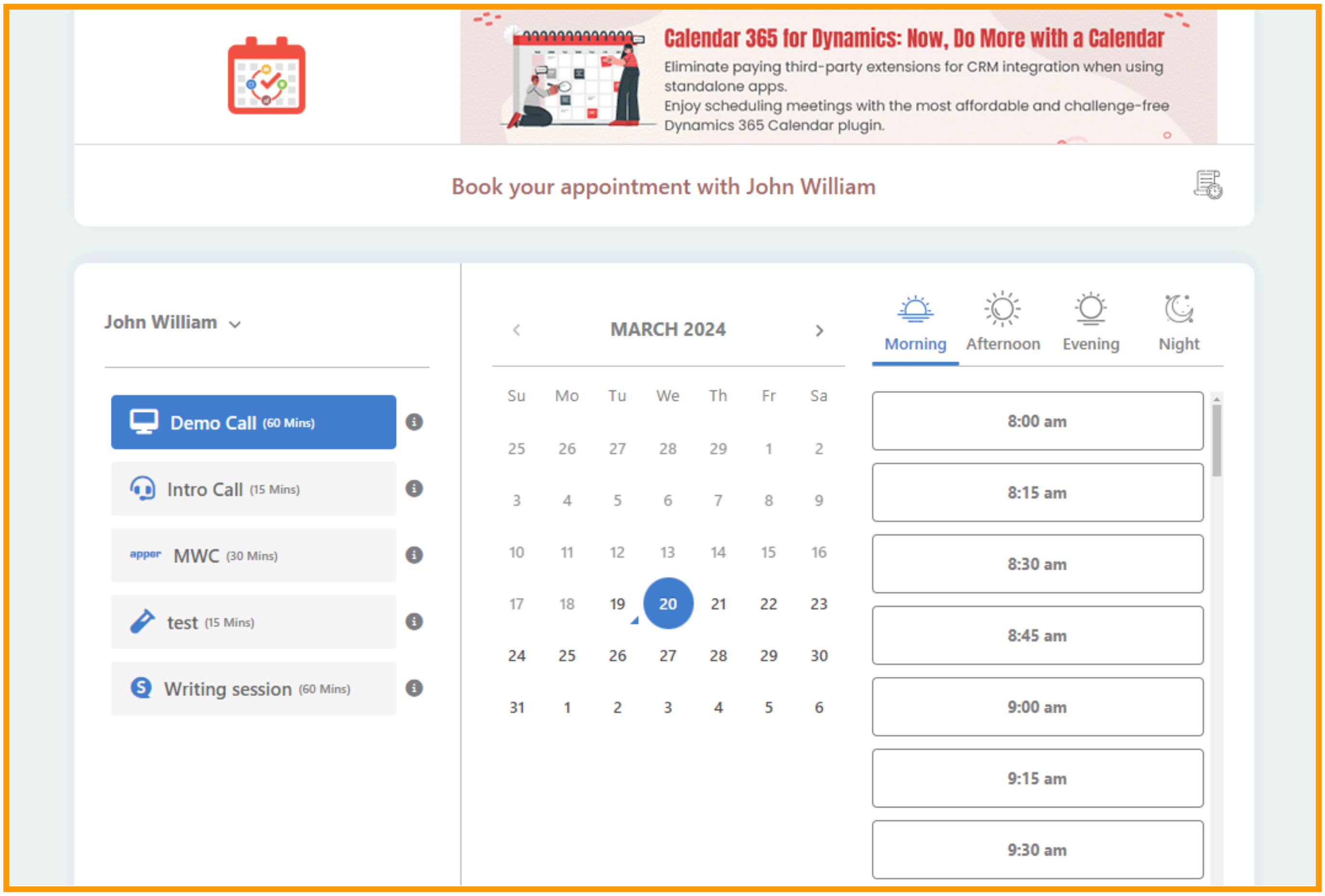
The respective buttons will allow you to sign in to Microsoft and Google. Once you have signed it, the button will be replaced with a Sign Out button. Click on “Save” after all the configurations.

This way you will be able to connect with Google/Outlook Calendar.

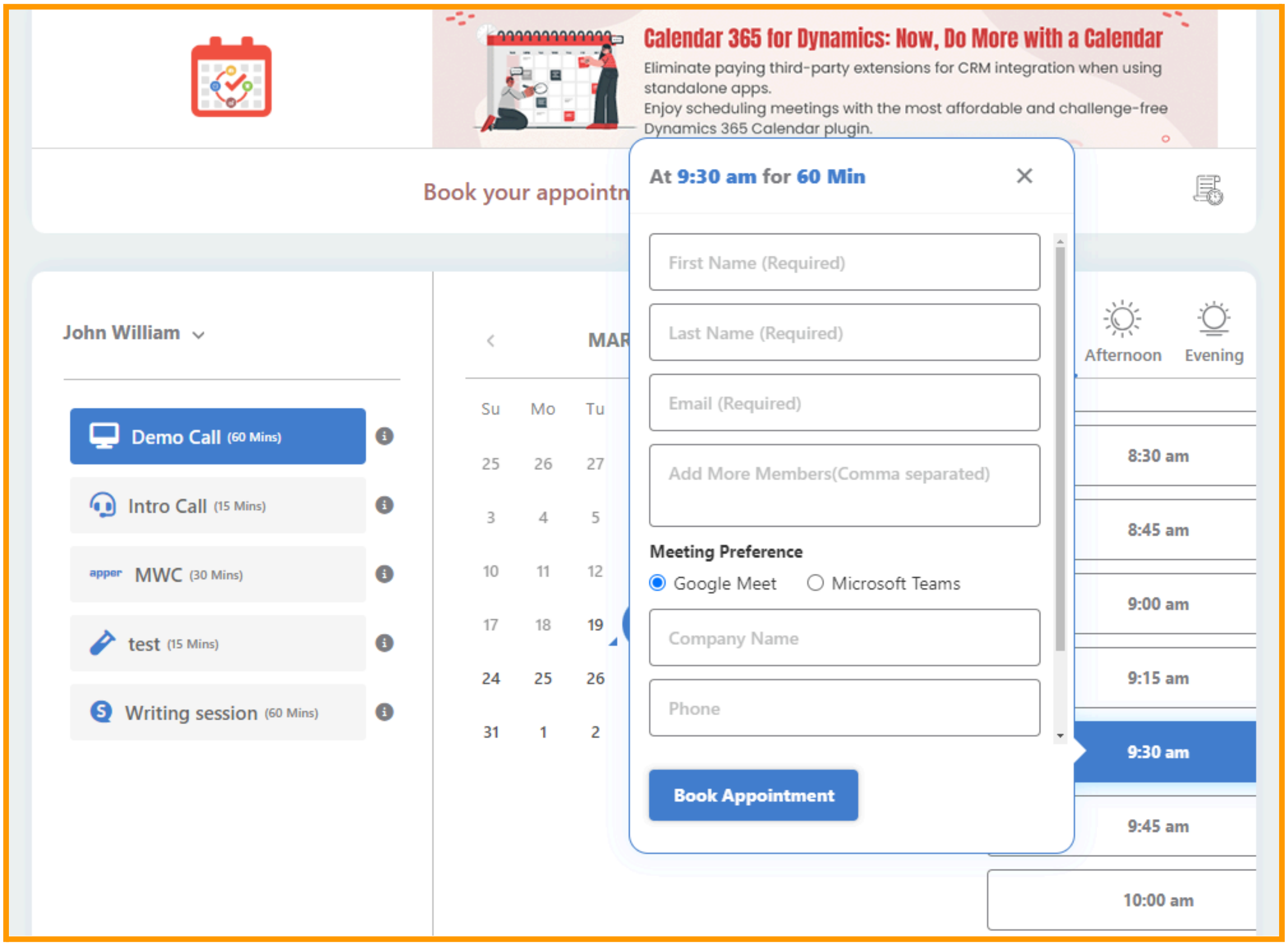


Appointment Booking

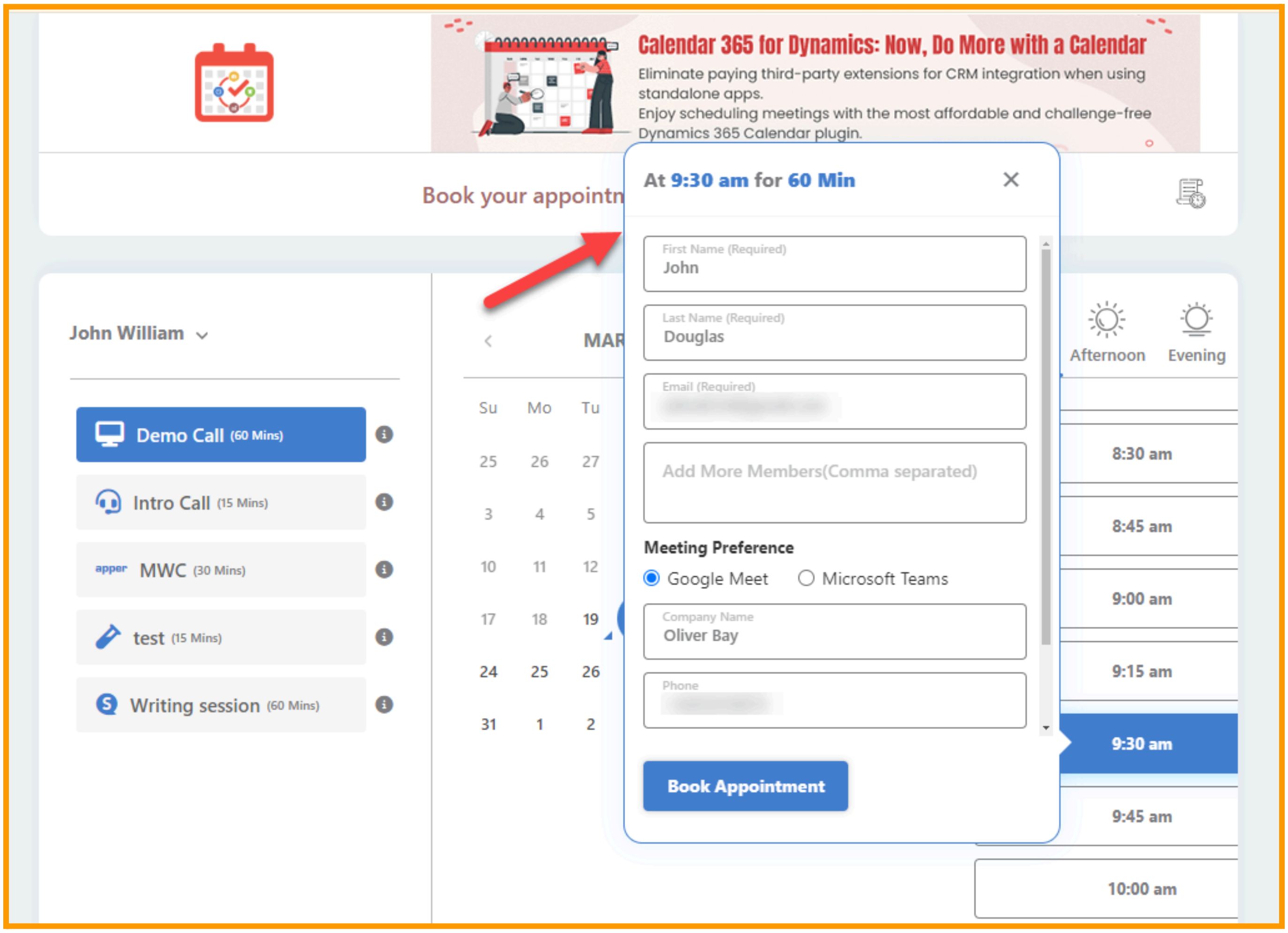
Your customer can book the appointment from here, which will be directly visible on the Dynamics calendar.



Your customer has to select the date and when clicked upon the preferred time slot, a booking form will be displayed.

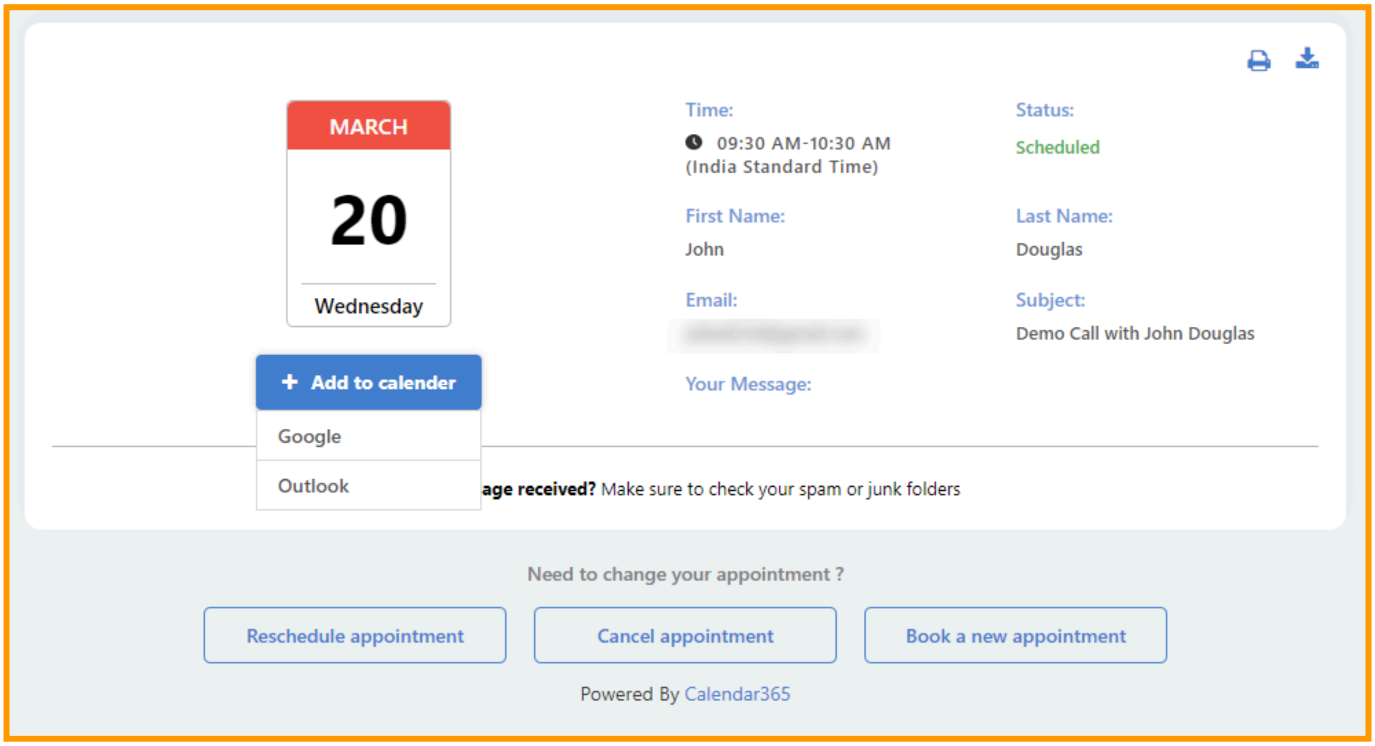


You need to fill in the following details:

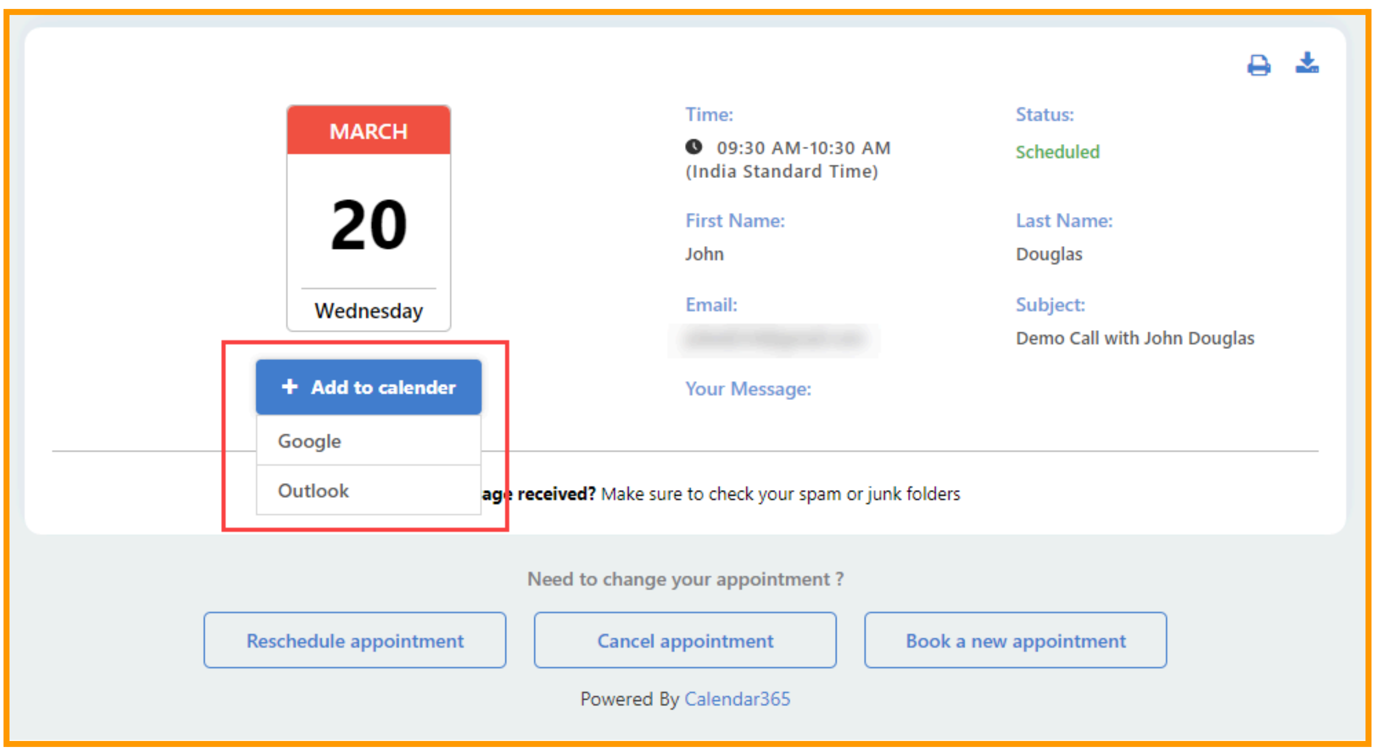


- **First Name & Last Name**: Insert the first and last name to book the appointment.
- **Email**: Insert the Email.
- **Add More Members:** Enter the email addresses of the members that you would like to include in the meeting.
- **Meeting Preference**: Select the option from Google Meet and Microsoft Teams where you would like to join the meeting.
- **Company Name**: Insert the name of the company.
- **Phone**: Insert the phone number.
- **Your Message**: Enter the message you want to convey for the meeting.

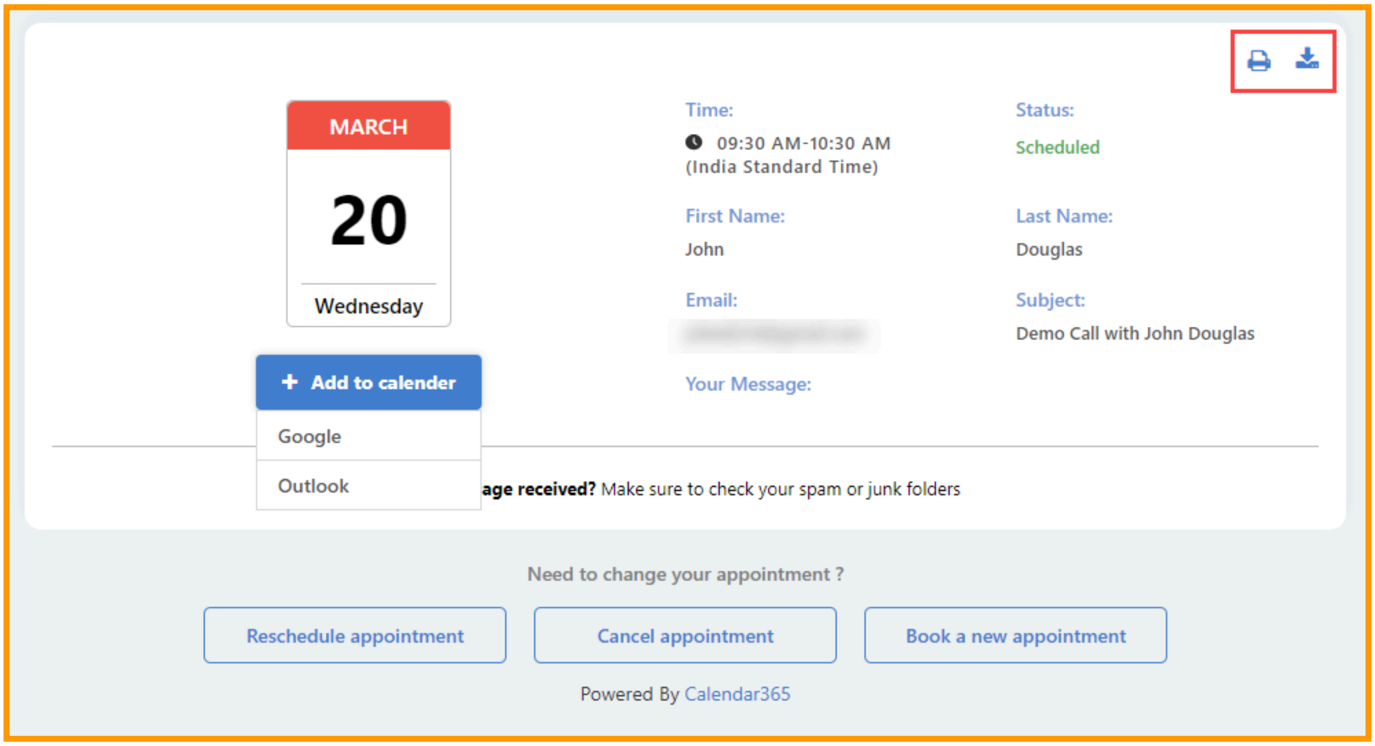
After inserting the information, click on the "**Book Appointment**" button, and your customer has successfully booked an appointment with you or your support agent.



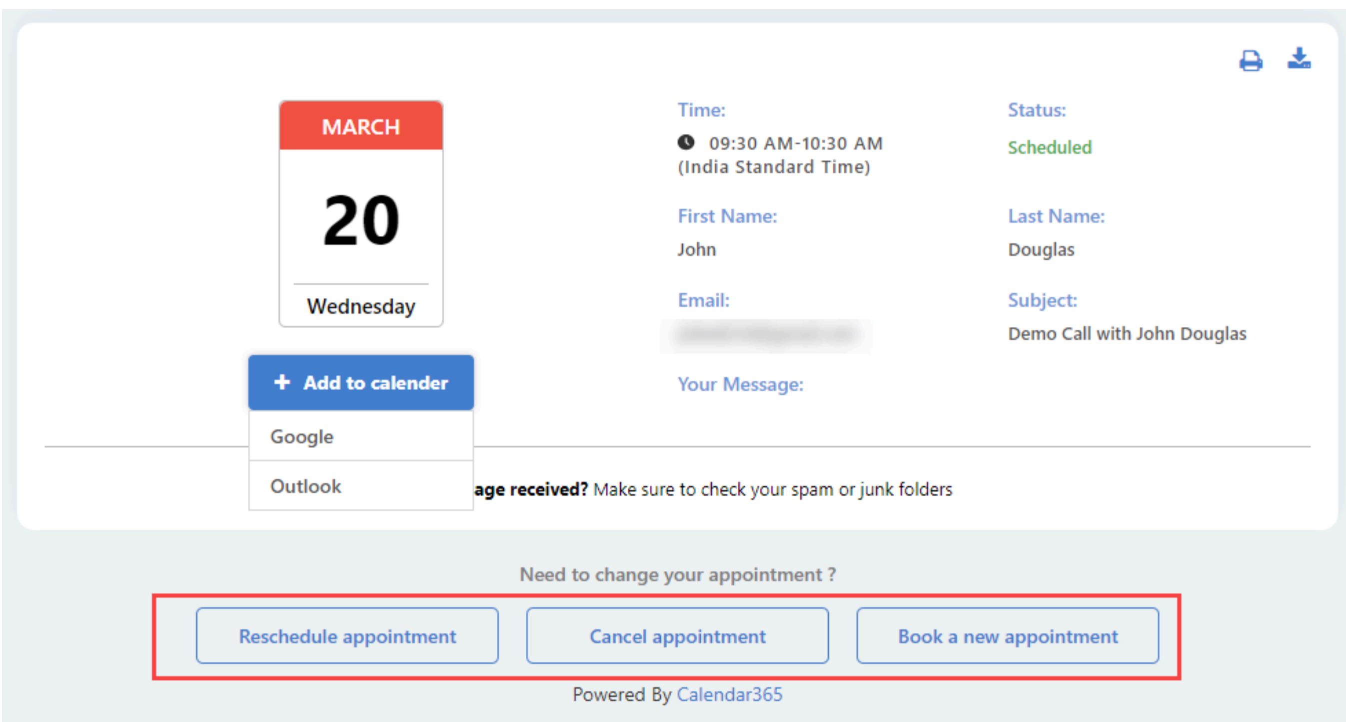
Your customers can add it to their Google or Outlook Calendar by clicking on the “**Add to Calendar**” button.



Your customer can print or download (ics file) the appointment by clicking on the respective icons shown in the below image.

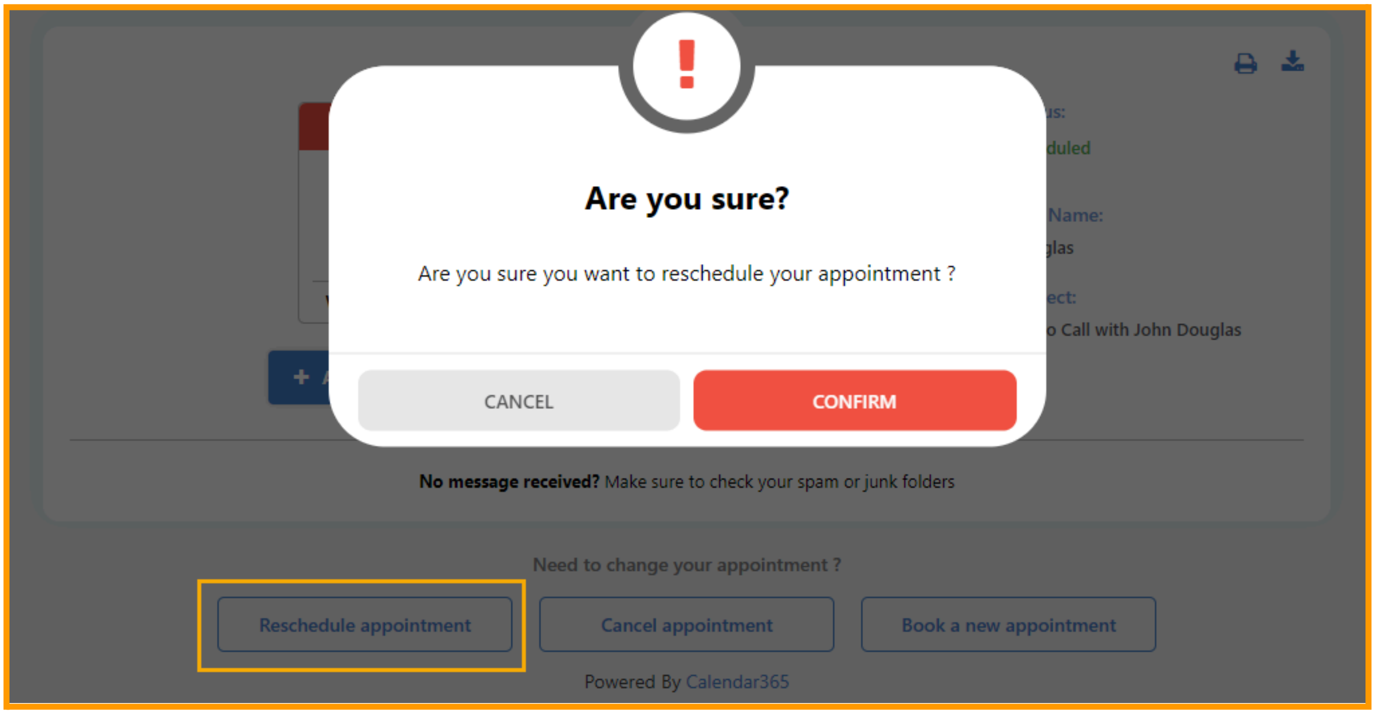


Your customer also has an option to **Reschedule**, **Cancel**, and **Book a new appointment**.

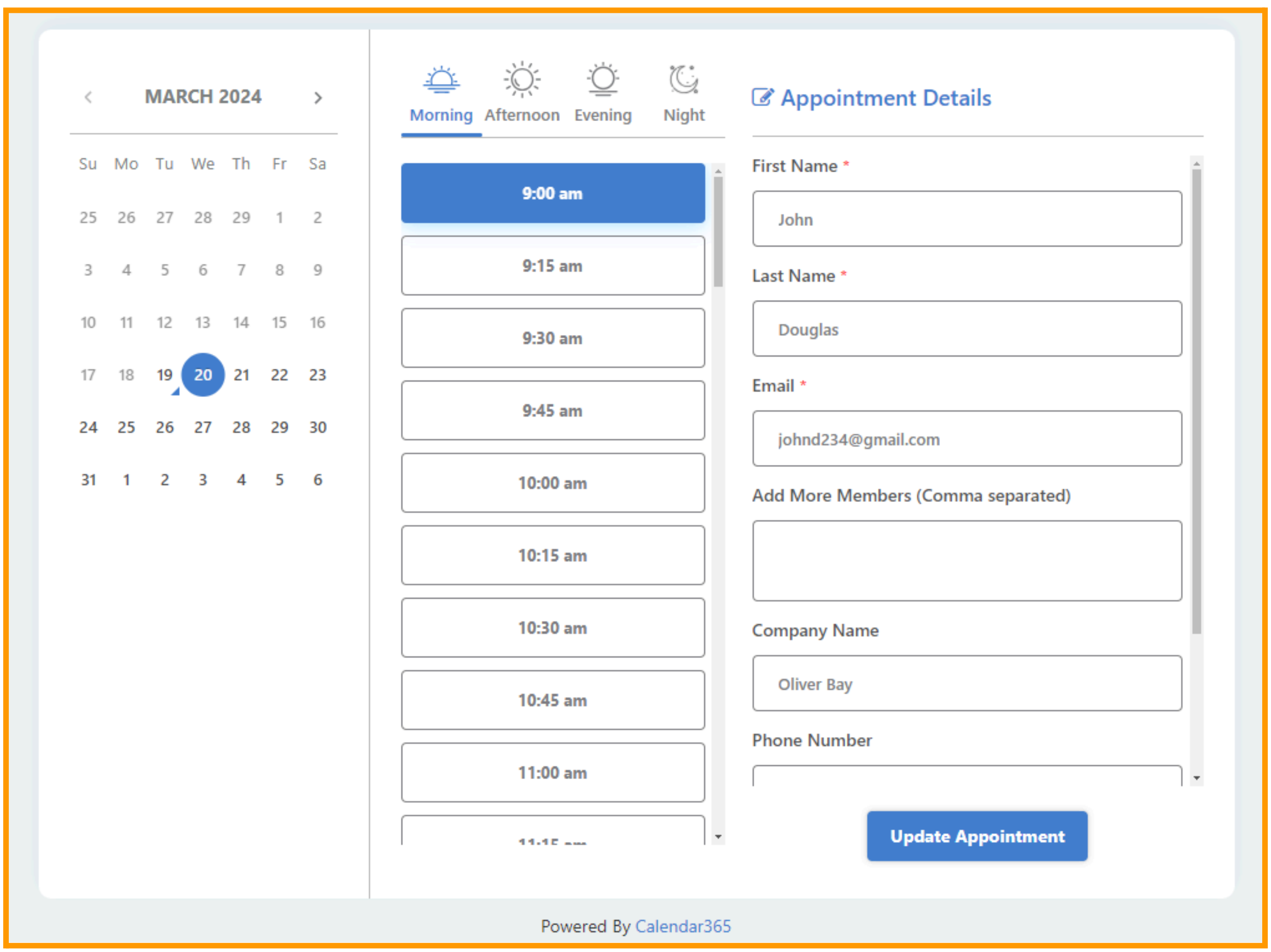


Reschedule Appointment

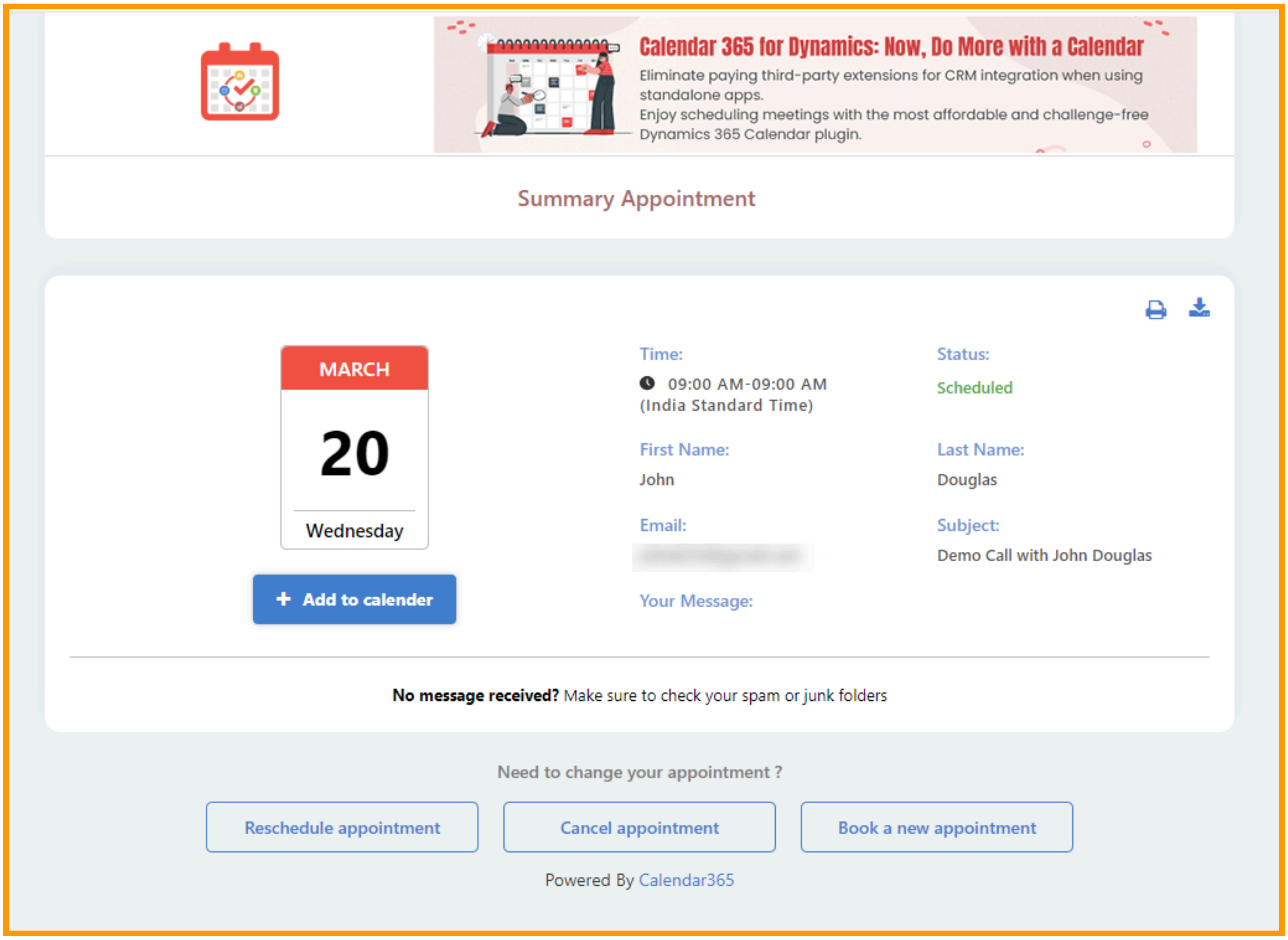
Click on the **Reschedule appointment** and click on the **Confirm** button.



Once your customer confirms the rescheduling, they will get the **Date**, **Time**, and **Appointment Details** option to change the detail or reschedule the timings of an appointment.

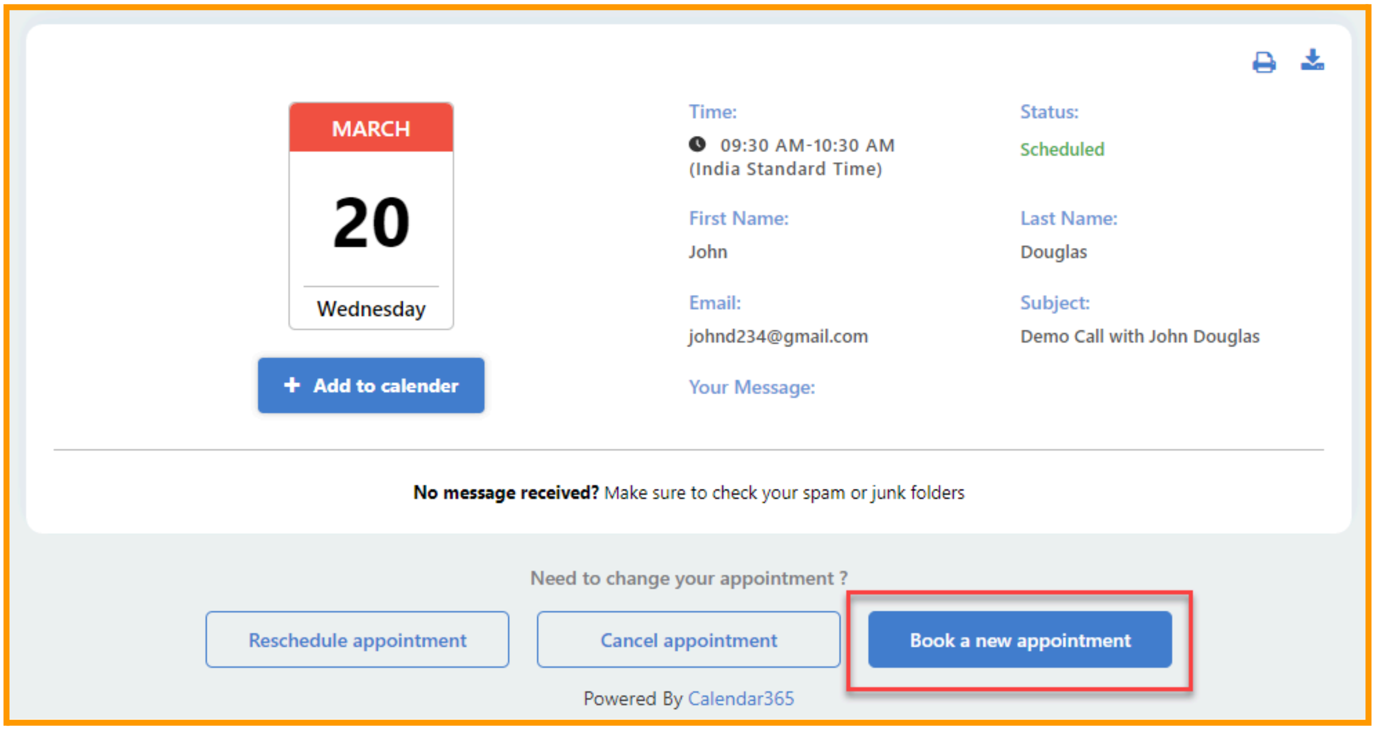


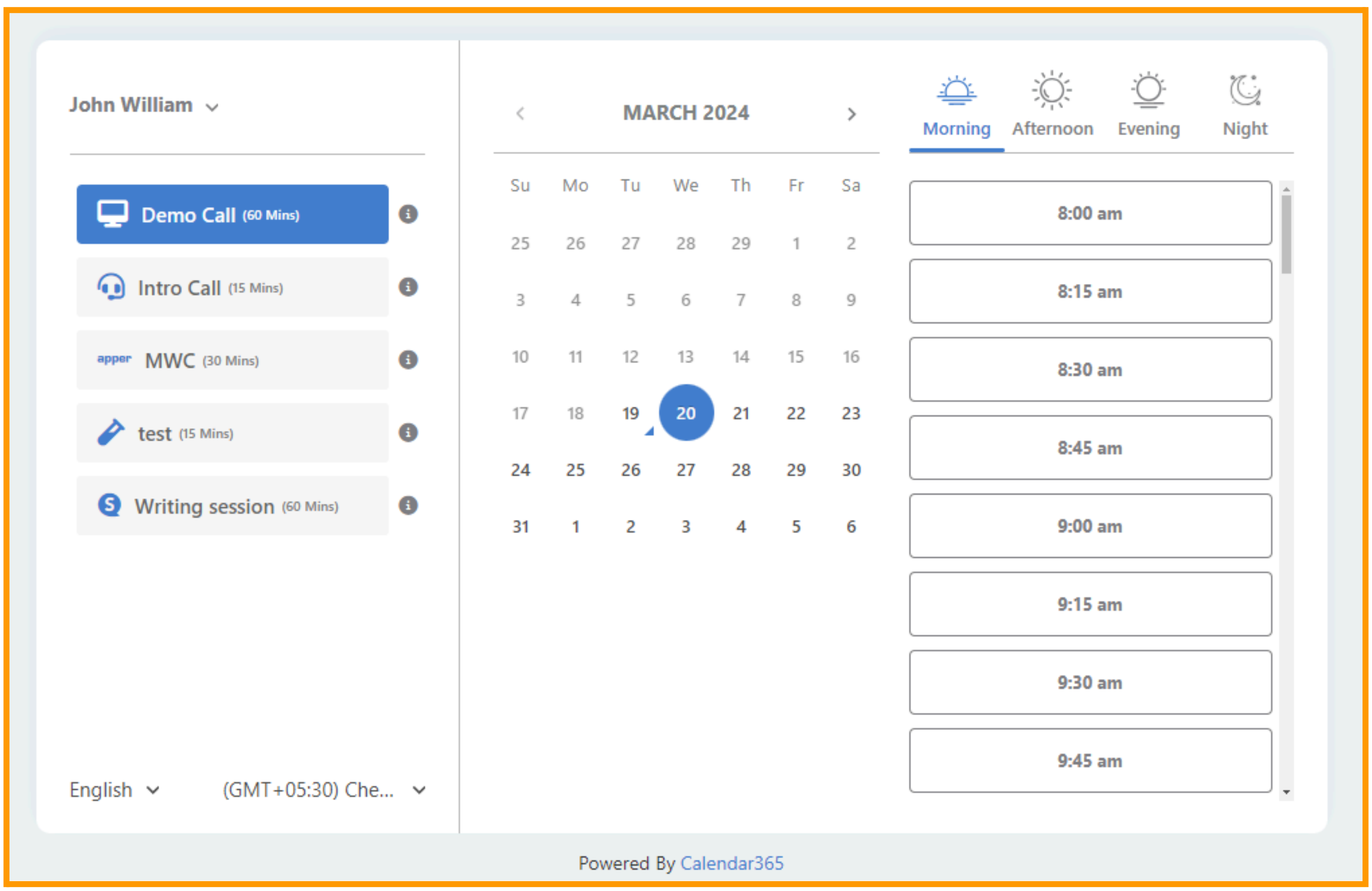
Now you can see the Rescheduled date and details of the appointment.



Book a new appointment

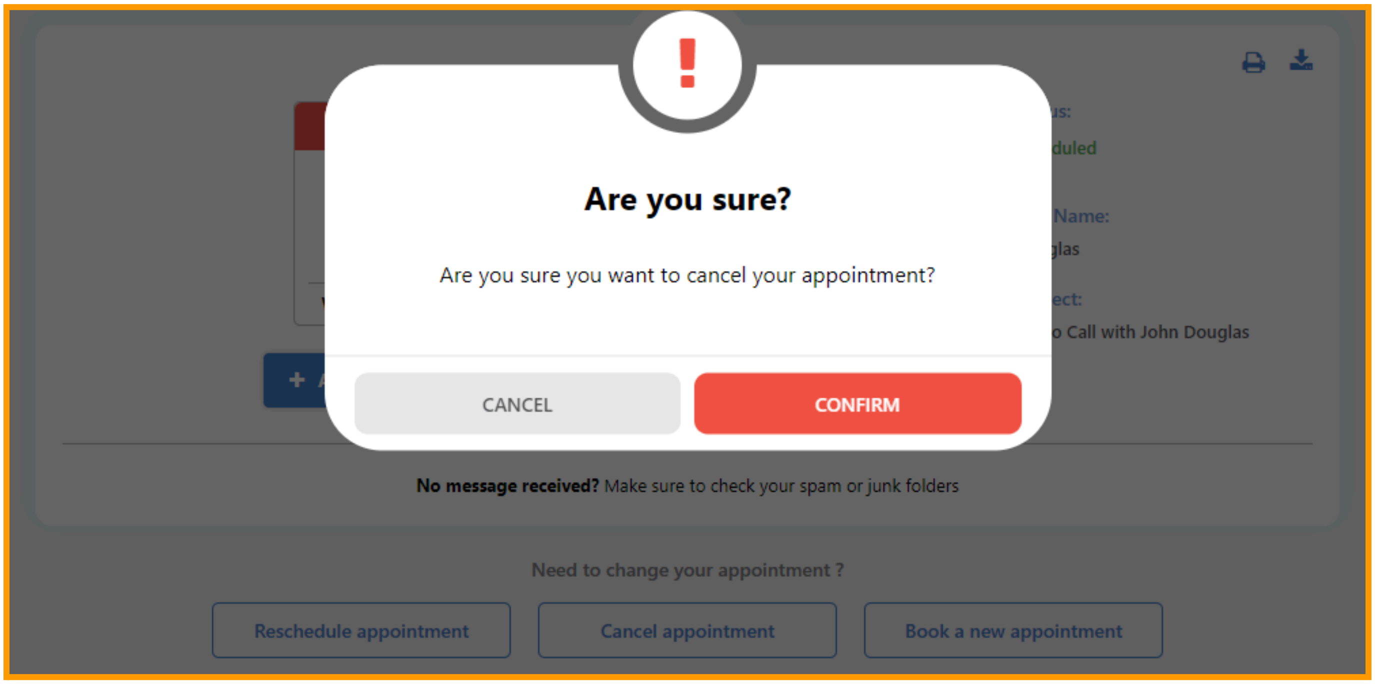
By clicking on the **Book a new appointment** button, your customers can create a new appointment as shown in the above process.


MARCH
20
Wednesday
+ Add to calender
Time:
09:30 AM-10:30 AM
(India Standard Time)
Status:
Scheduled
First Name:
John
Last Name:
Douglas
Email:
johnd234@gmail.com
Subject:
Demo Call with John Douglas
Your Message:
No message received? Make sure to check your spam or junk folders
Need to change your appointment ?
Reschedule appointment
Cancel appointment
Book a new appointment
Powered By Calendar365

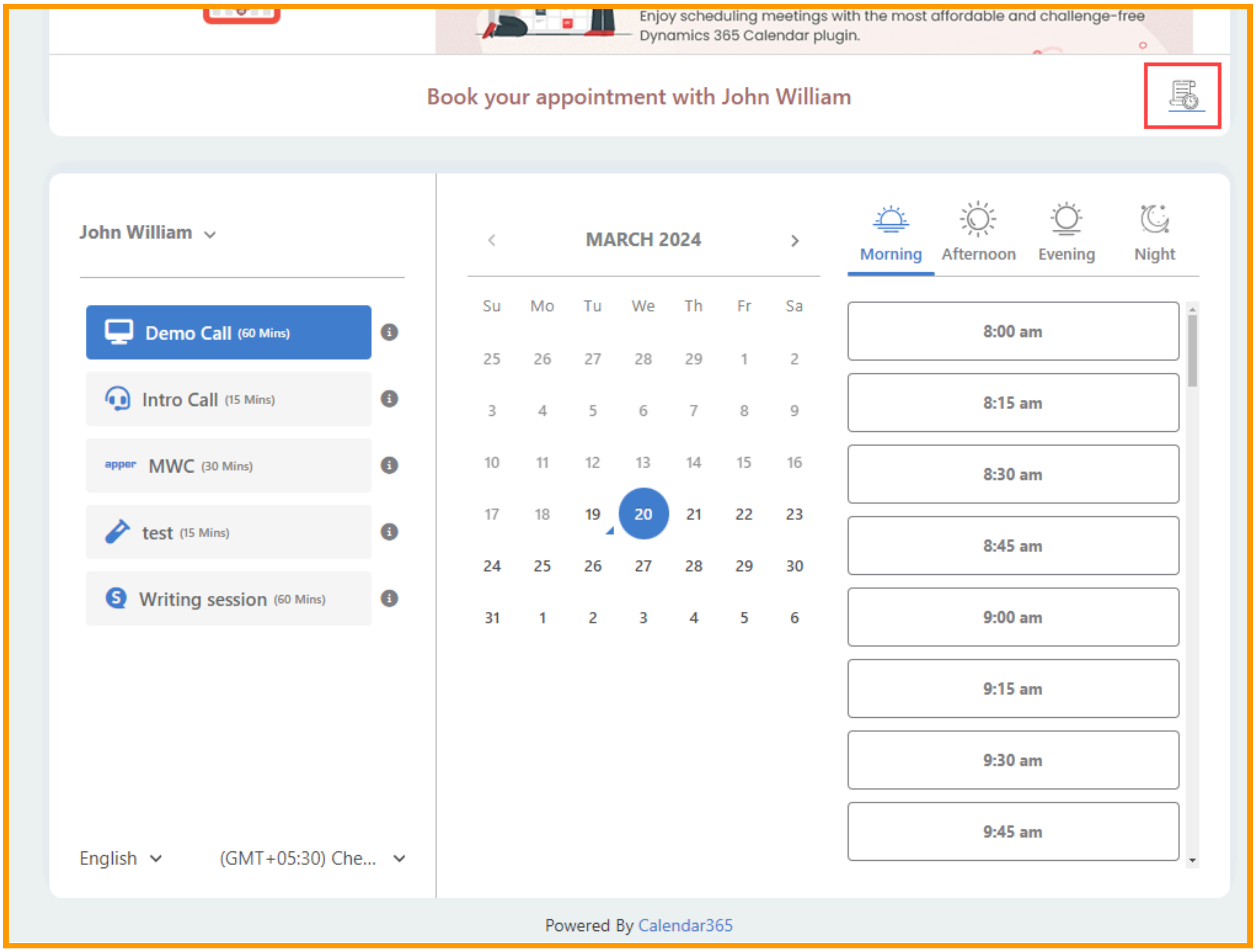

John William
Demo Call (60 Mins)
Intro Call (15 Mins)
MWC (30 Mins)
test (15 Mins)
Writing session (60 Mins)
English
(GMT+05:30) Che...
MARCH 2024
Su Mo Tu We Th Fr Sa
25 26 27 28 29 1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
31 1 2 3 4 5 6
Morning
Afternoon
Evening
Night
8:00 am
8:15 am
8:30 am
8:45 am
9:00 am
9:15 am
9:30 am
9:45 am
Powered By Calendar365

Cancel Appointment

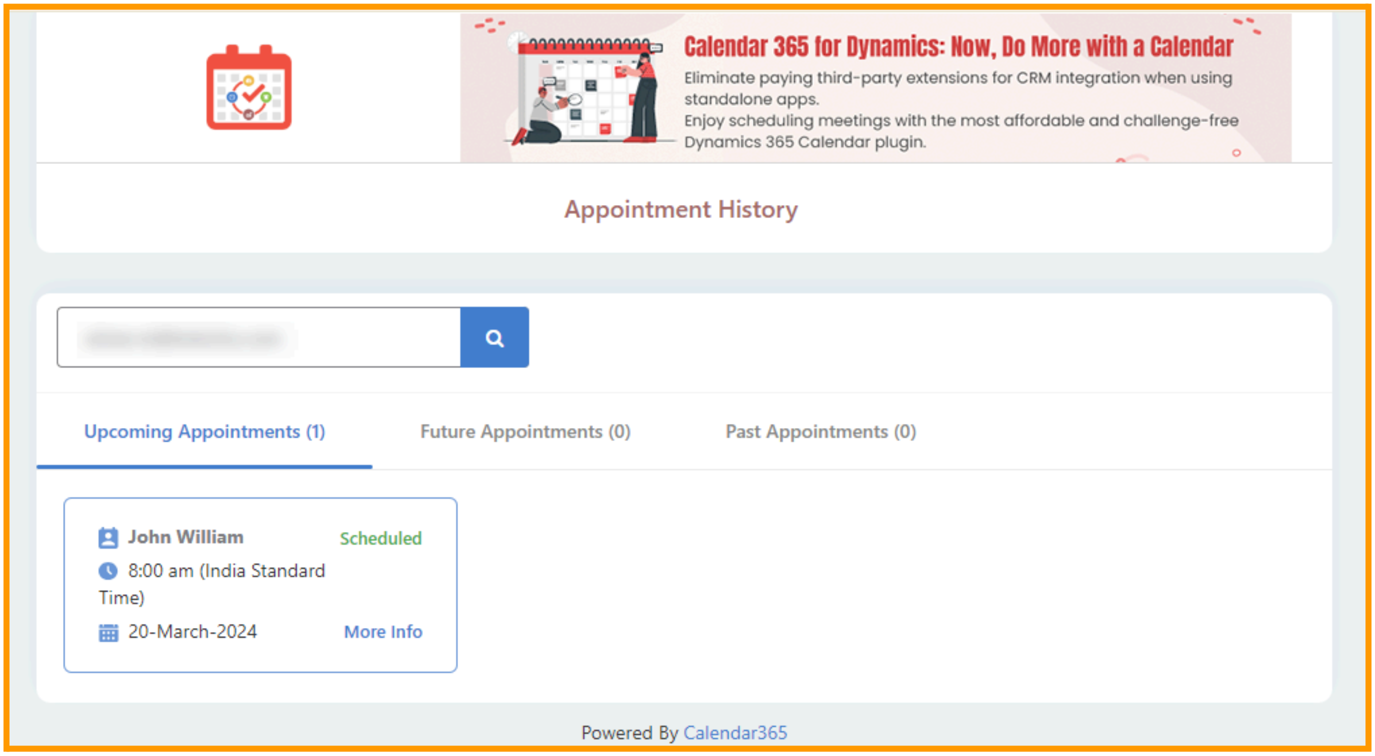
Your customer can also cancel the appointment by clicking on the **Cancel appointment** and **Confirm** button.



Appointment History



By clicking the history icon they can view the entity appointment history in 3 parts i.e. **Upcoming Appointments**, **Future Appointments**, and **Past Appointments**.

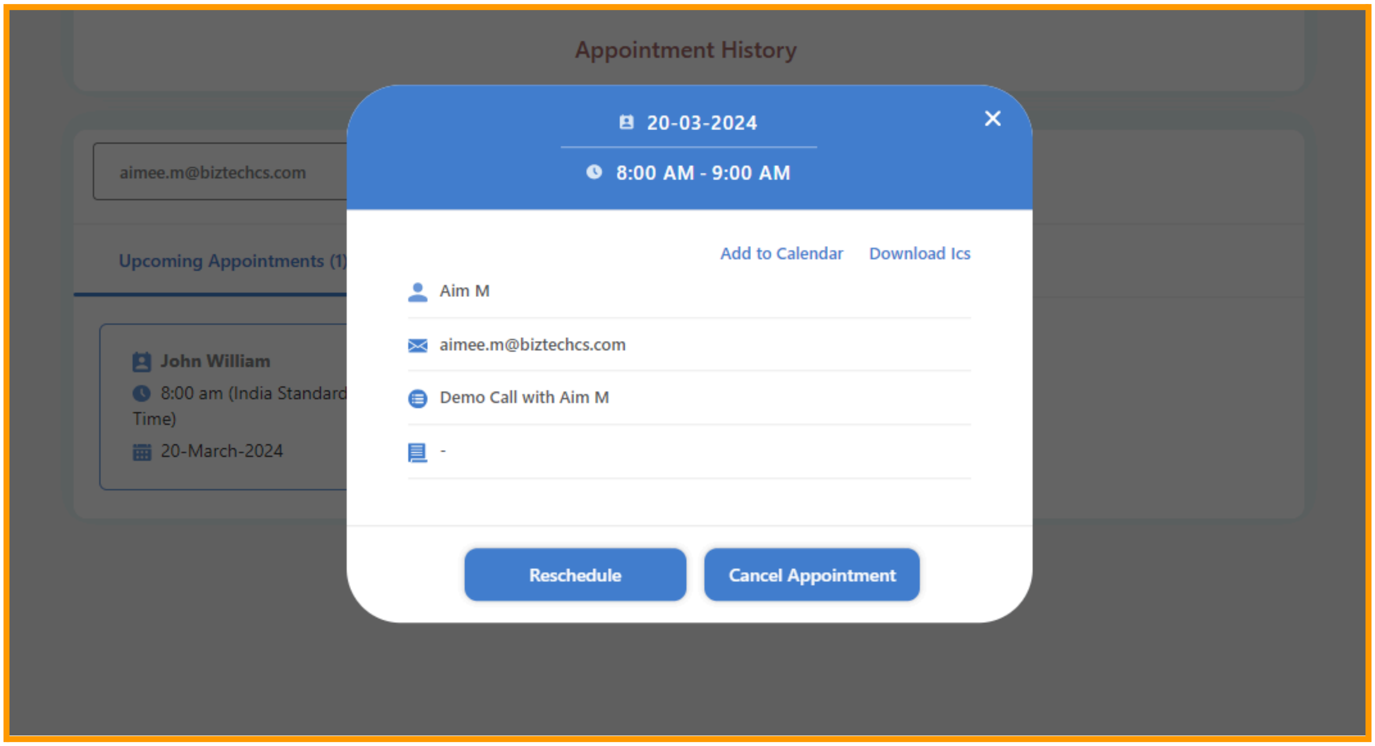


Upcoming Appointments: As the name itself suggests, here they will get the appointment details less than 7 days of actual date of appointment.

Future Appointments: In this section, you will get the appointment details followed by 7 days of an actual date.

Past Appointments: In this section, you will get the past appointment details.

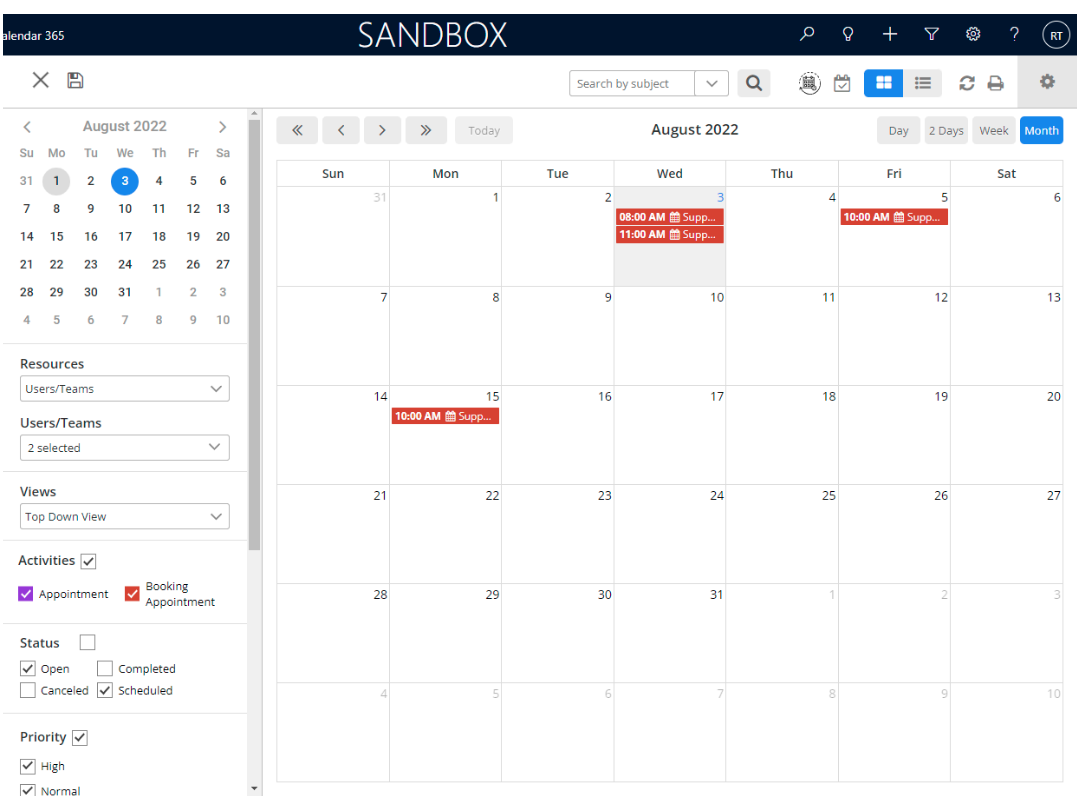
More Info : When clicked upon a pop-up containing the details of the appointment would be displayed.



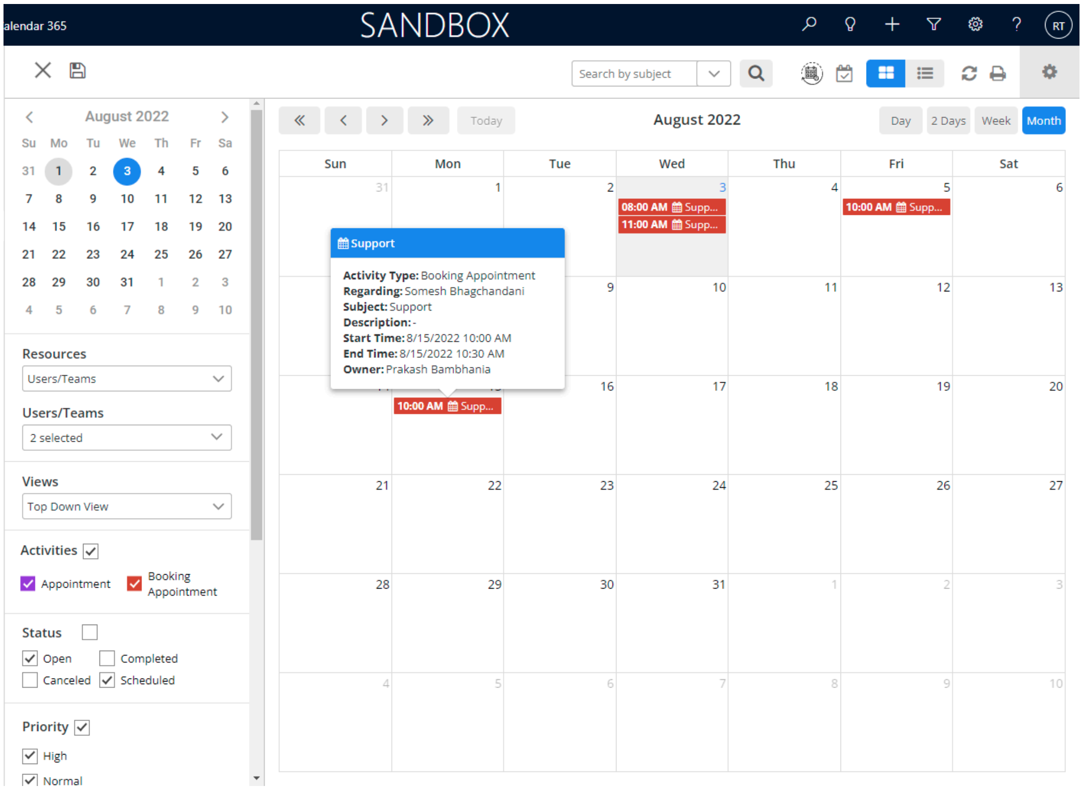
Here customer only has **Add to Calendar**, **Download Ics**, **Reschedule**, and **Cancel Appointment** options.

Check Booking Appointment

Once your customers book the appointments, you can view them in your calendar.



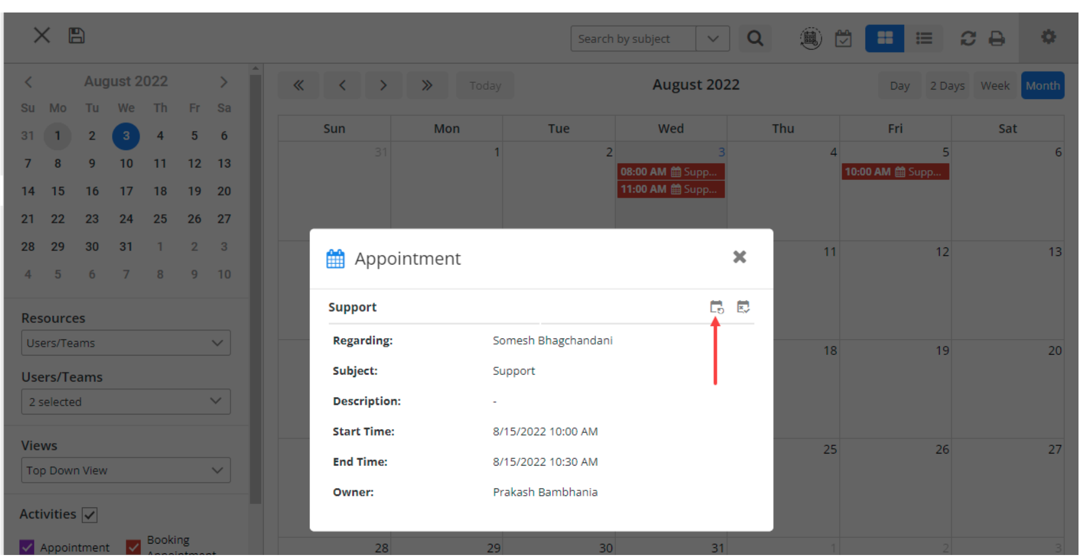
By hovering on it, you can view the basic details of the appointment as per the configuration.

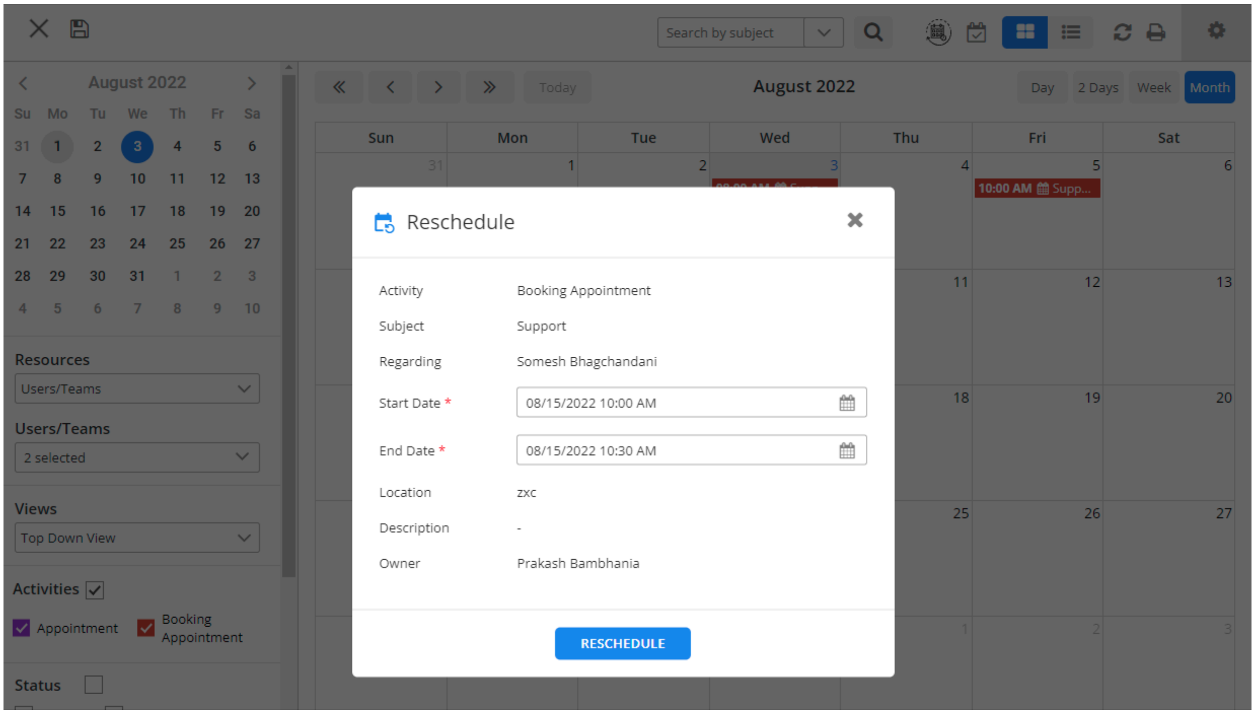


By clicking on the appointment, you can view its details and you will have an option to **Reschedule**, **Re-assign**, and **Cancel** the appointment.

Reschedule

Click on the **Reschedule** icon and fill in the required details.

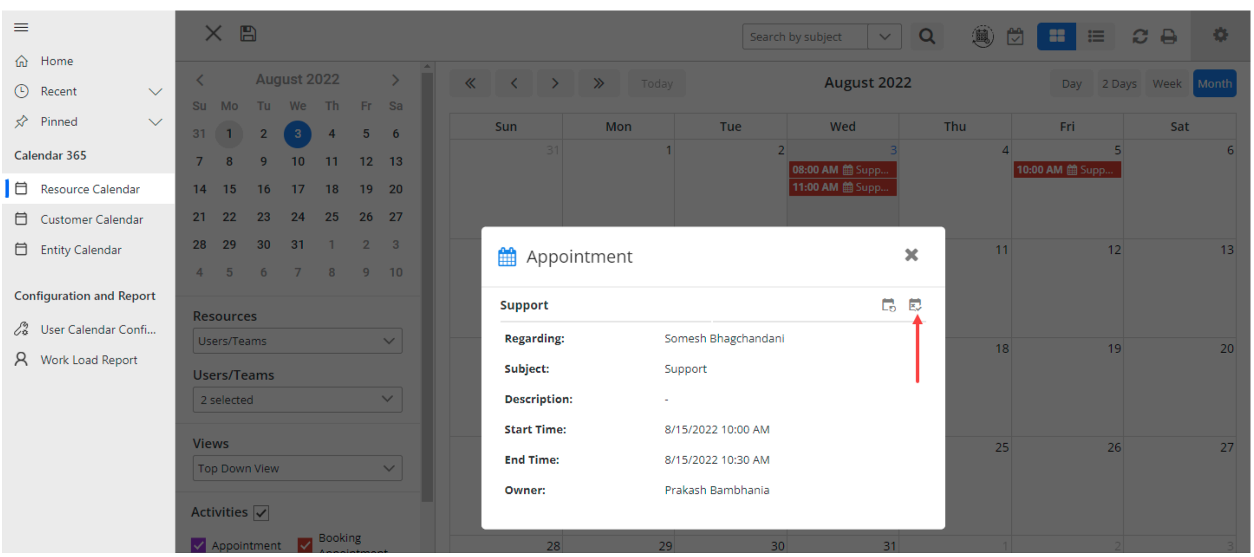




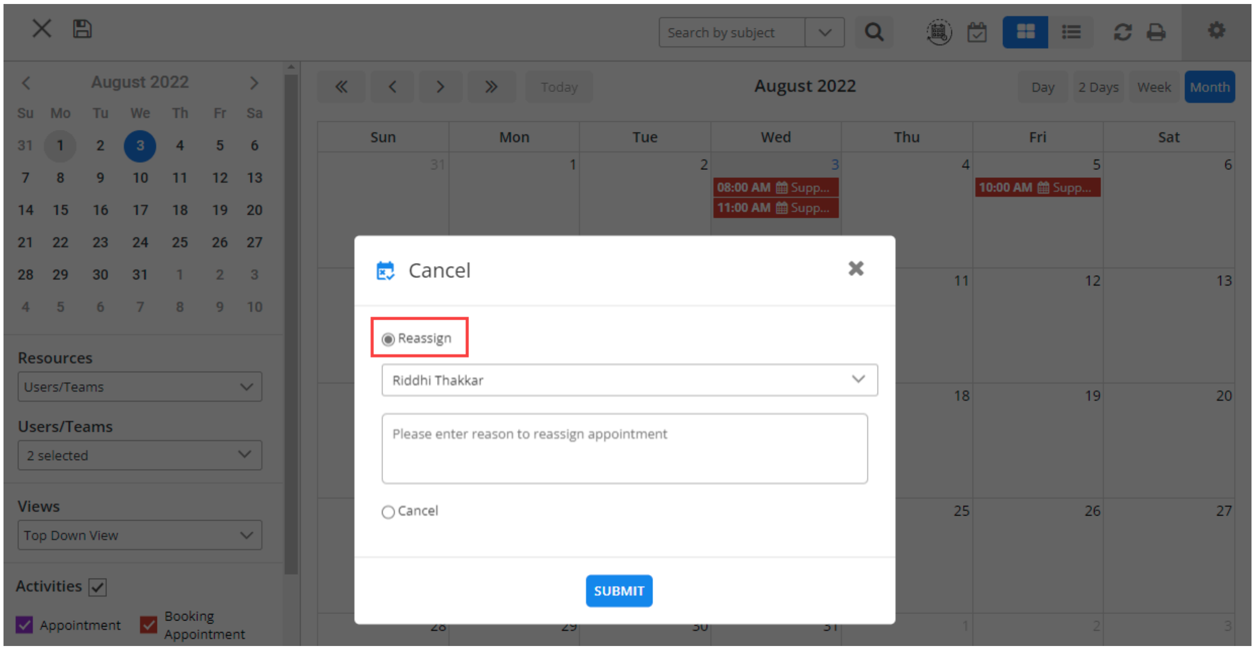
After change, the date of an appointment click on the Reschedule and the appointment will be rescheduled with your customer.

Reassign

Click on the **Reassign/Cancel** icon and select the **Reassign** option.

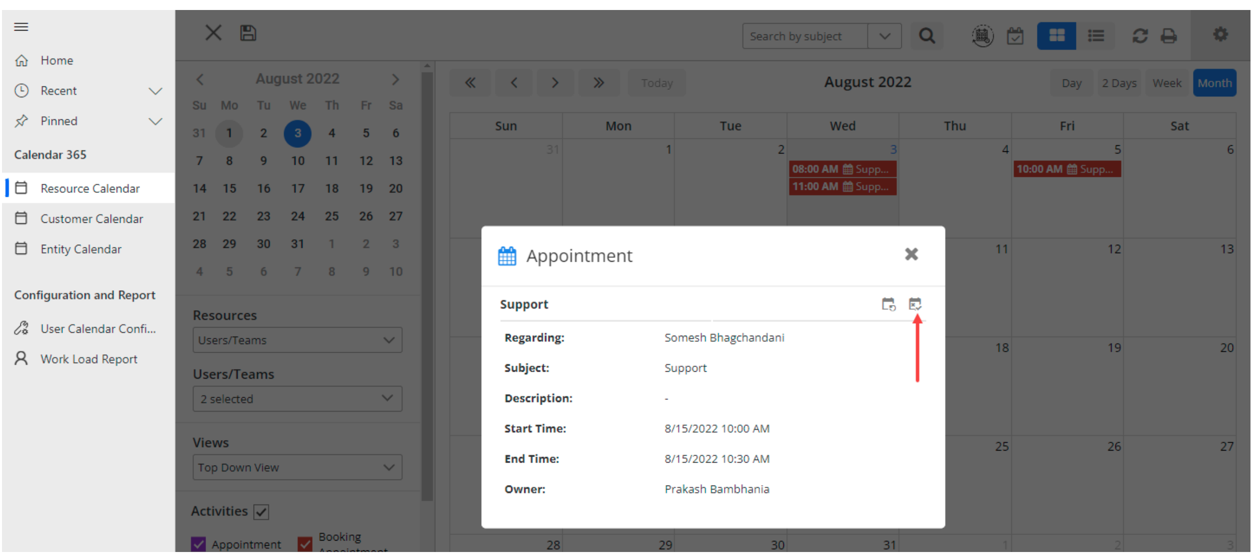


Select the person you want to assign this appointment to, insert the reason to reassign the appointment, and click on the **Submit** button.

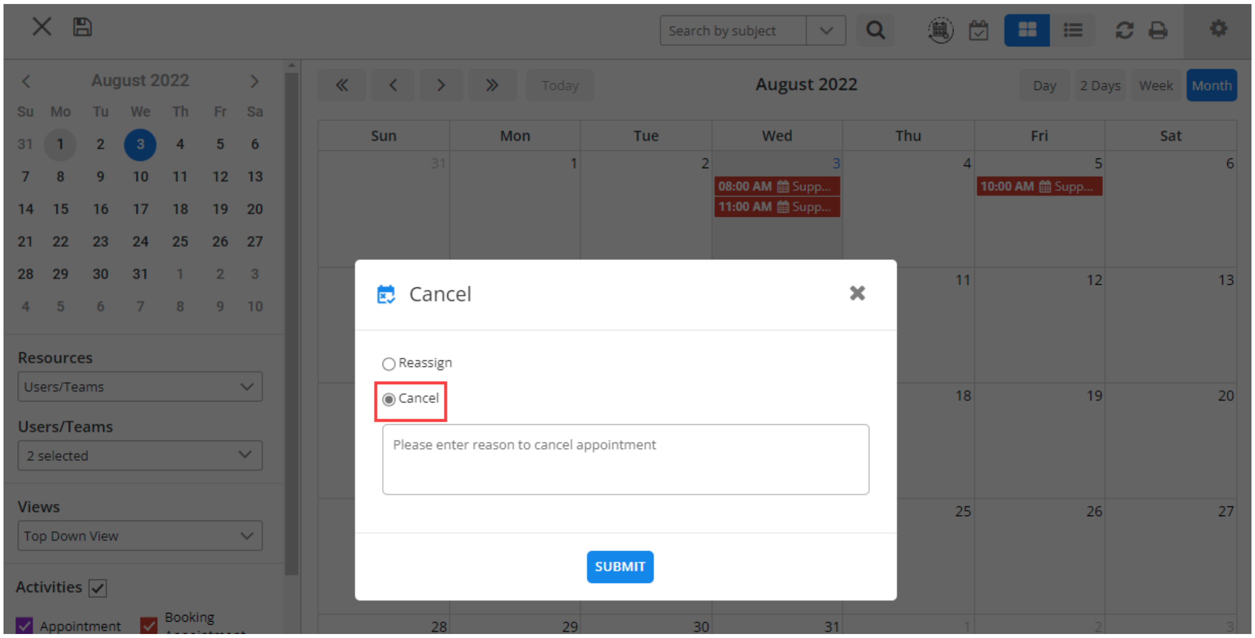


Cancel

Click on the **Re-assign/Cancel** icon and select the **Cancel** option.



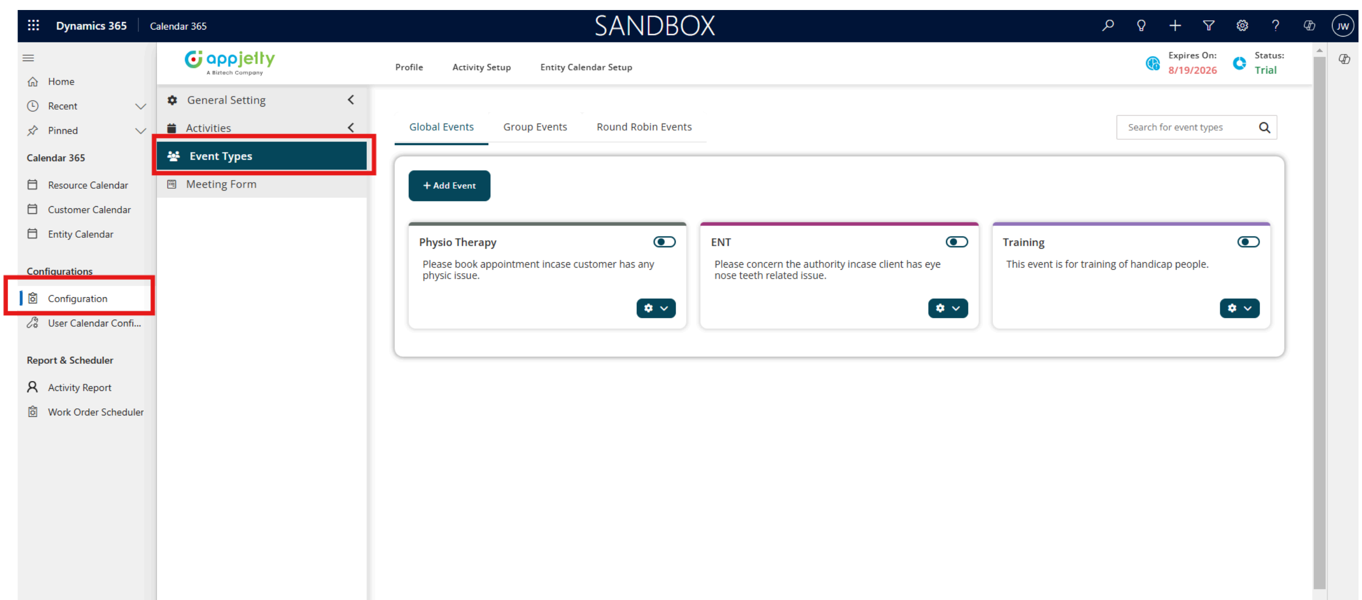
Insert the reason to cancel the appointment and click on the **Submit** button.



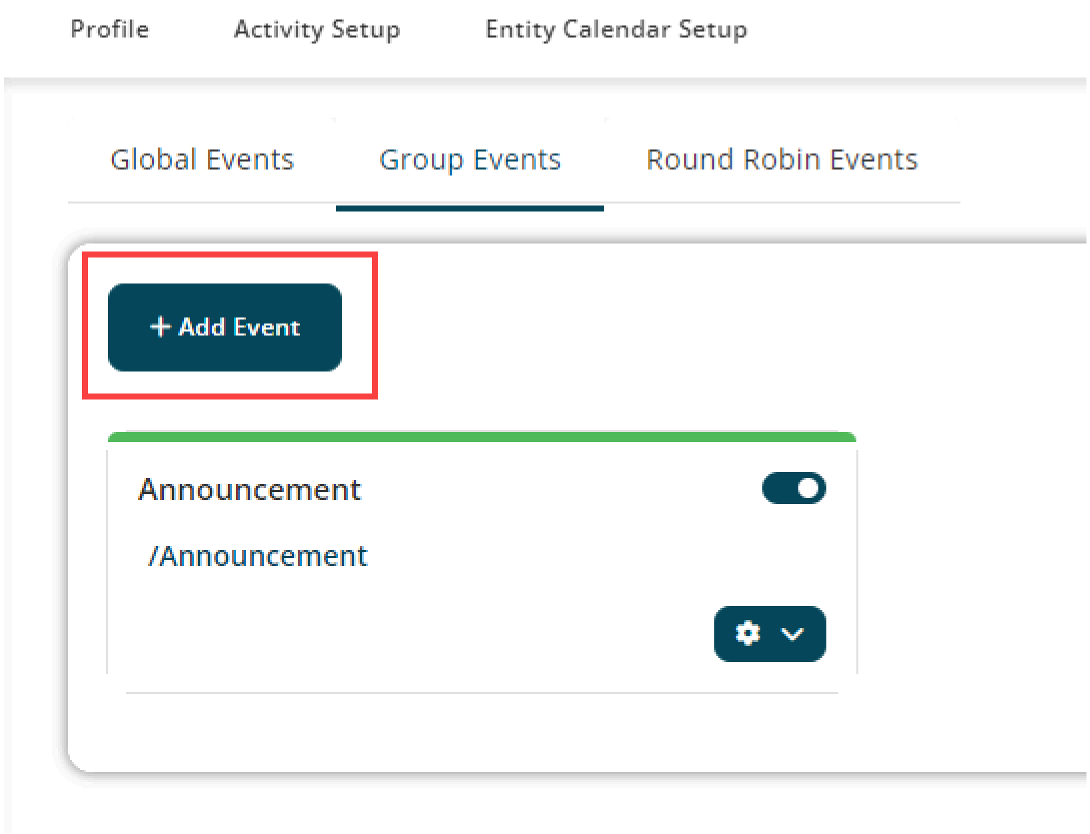
Group Events

In Group Meeting, the meeting would be scheduled during the availability of all the members that are selected for the particular event.

The group configurations can be accessed by navigating to the **Configurations -> Event Types -> Group Events.**



Clicking on the "Add Event" button displays an "Add Event Type" form.



The form contains the following fields **:**

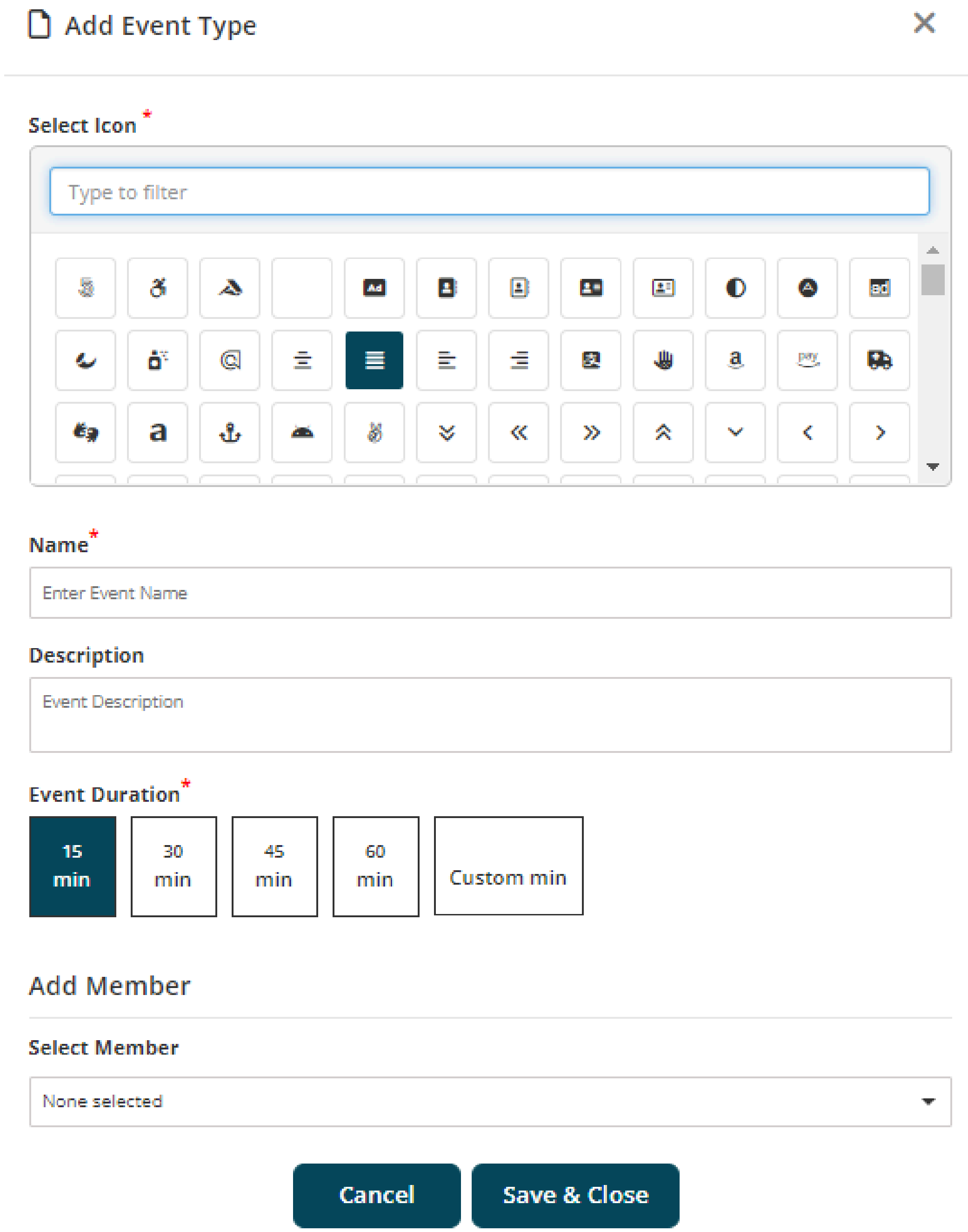
-> **Select icon** : Select an icon among those that are displayed. You can also filter the list.

-> **Name** : You can enter the event name.

-> **Description** : Information regarding the event.

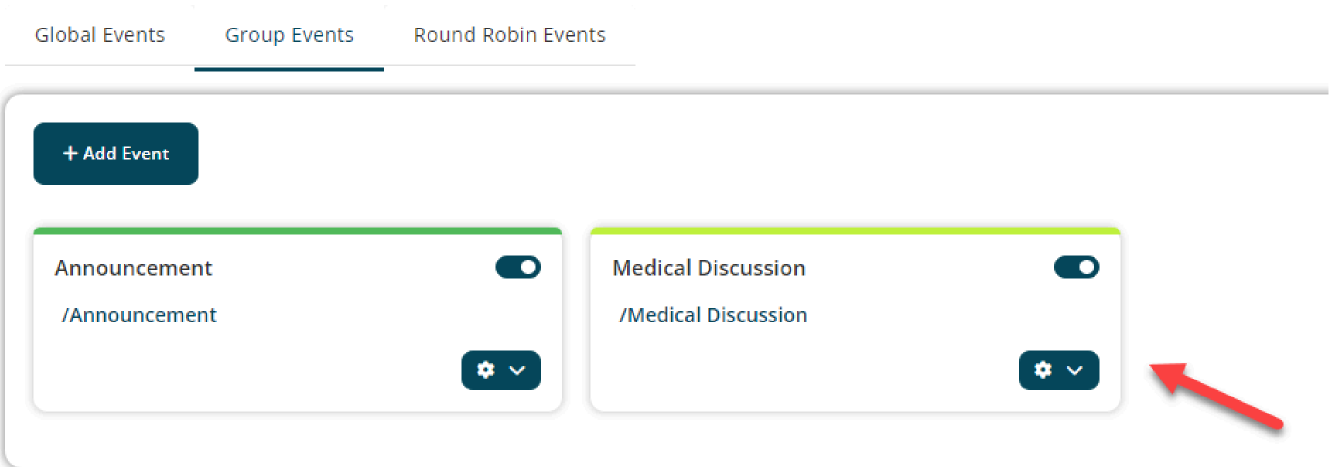
-> **Event Duration** : There are default durations provided. Other than those, you can also add a custom duration.

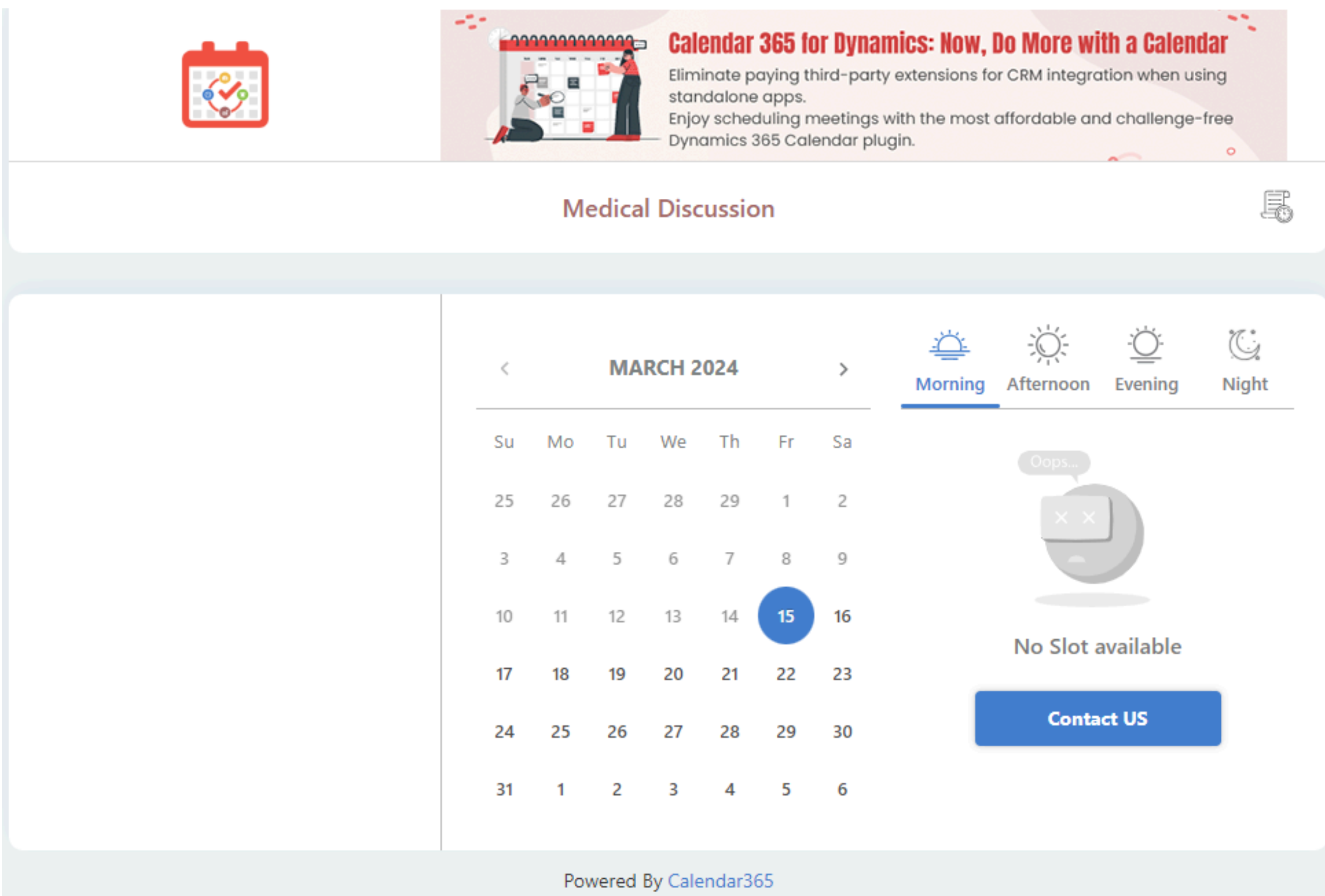
-> **Add Member** : You can add members by selecting from the dropdown.



Once all the details are entered you can **Save & Close** the form and the saved event will be listed in the Group Events section.

You need to enable the event and by clicking on the hyperlink you would be able to navigate to the respective event calendar.





Settings :

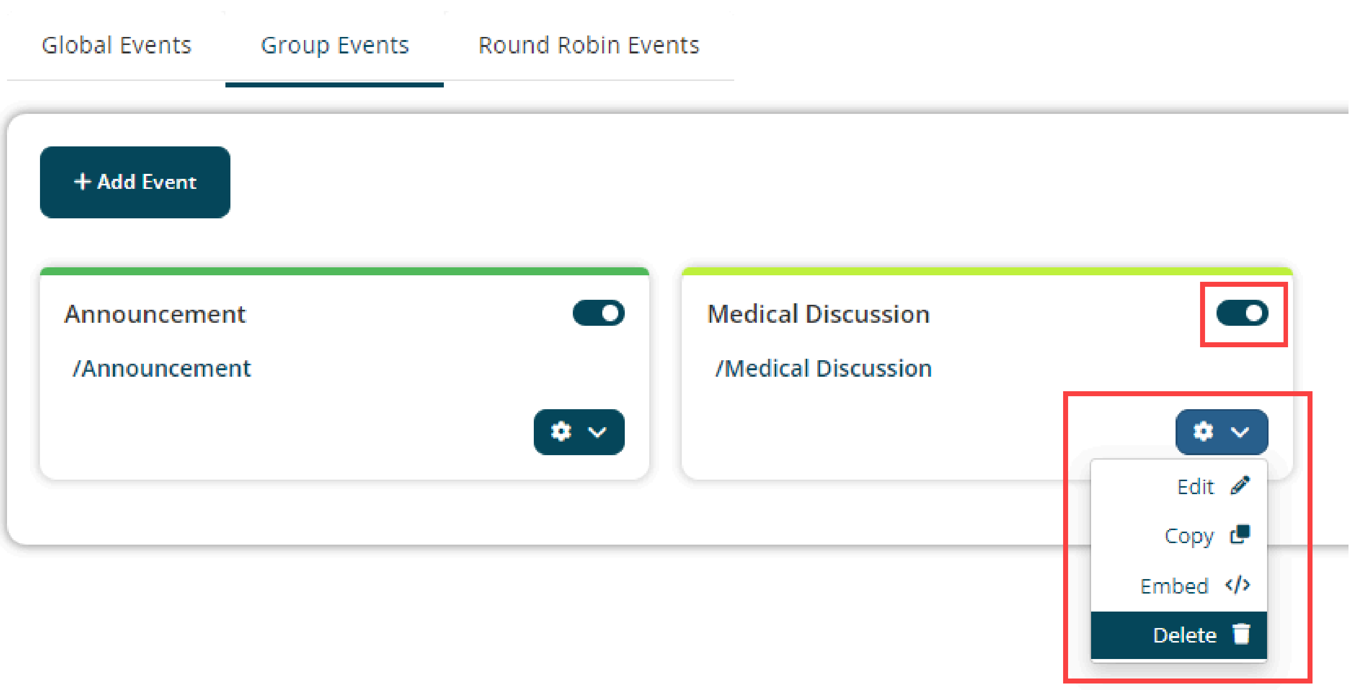
You can perform various actions such as :

Edit -> The update of the event can be done through here. Once all the details are updated you need to “Update & Close”.

Copy -> Clicking here copies all the details of the current event into a new form.

Embed -> HTML code that you will be able to copy and paste will be shown.

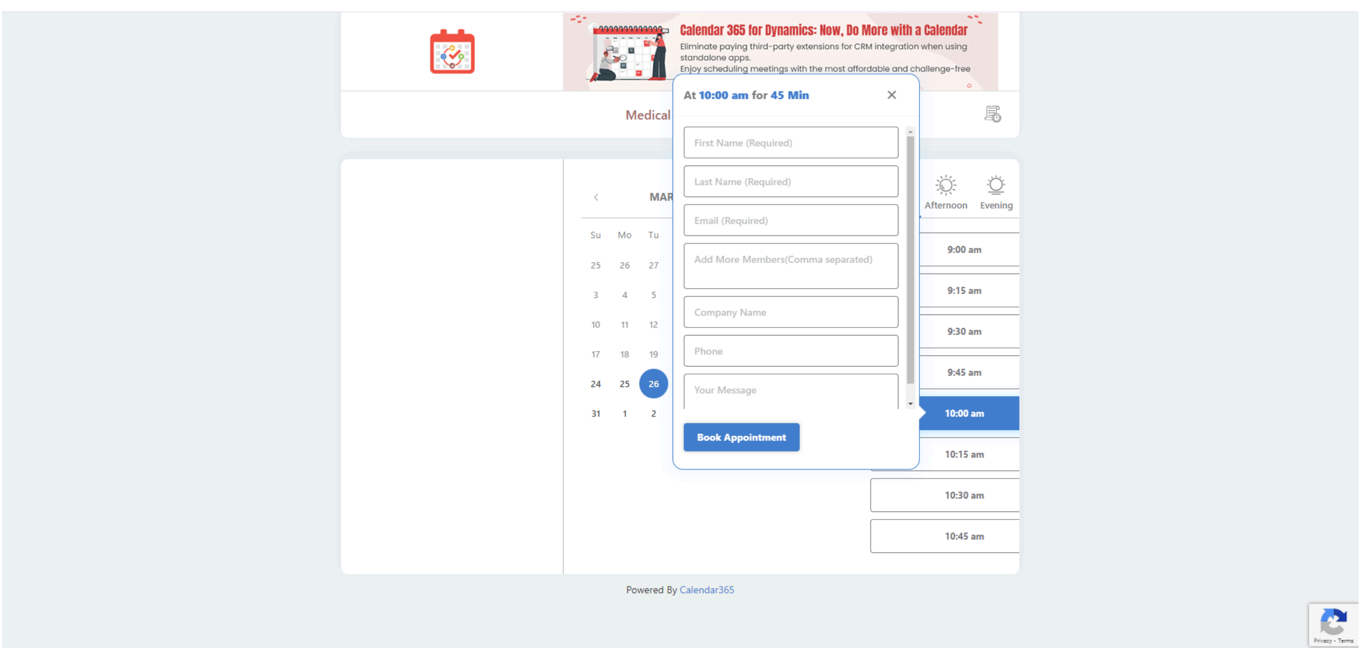
Delete -> You will be able to delete the particular event.



Now when navigated to the booking link, slots during which all the members of the event are available will be displayed.

In order to book an appointment, click on the preferred slot and a form will be displayed. Entering all the required information and clicking on “Book Appointment” will schedule an appointment during that particular time slot.

A summary will be displayed and also all the members of the event will be notified.

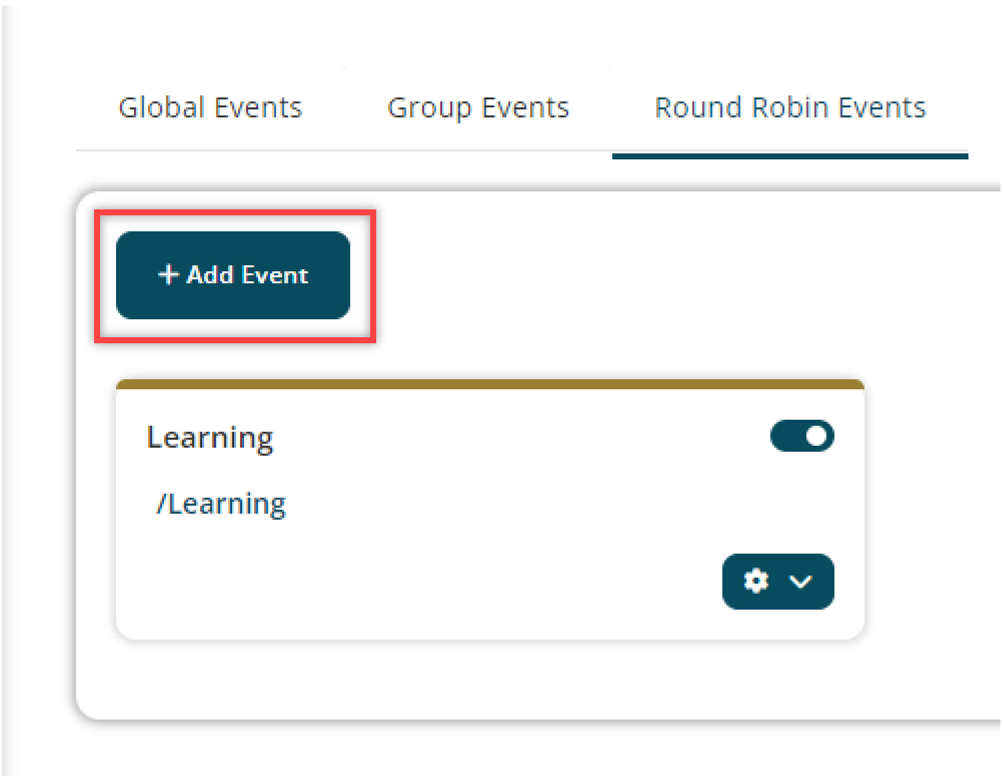


Round Robin Events

In Round Robin, if any one of the selected members is available during the preferred time slot then the meeting will be scheduled with that particular member. In Round Robin, there is no such requirement of availability of all the added members, if any one among them are available then the meeting can be created.

The Round Robin configurations can be accessed by navigating to the **Configurations -> Event Types -> Round Robin Events.**

Clicking on the “Add Event” button displays a “Add Event Type” form.



The form contains the following fields **:**

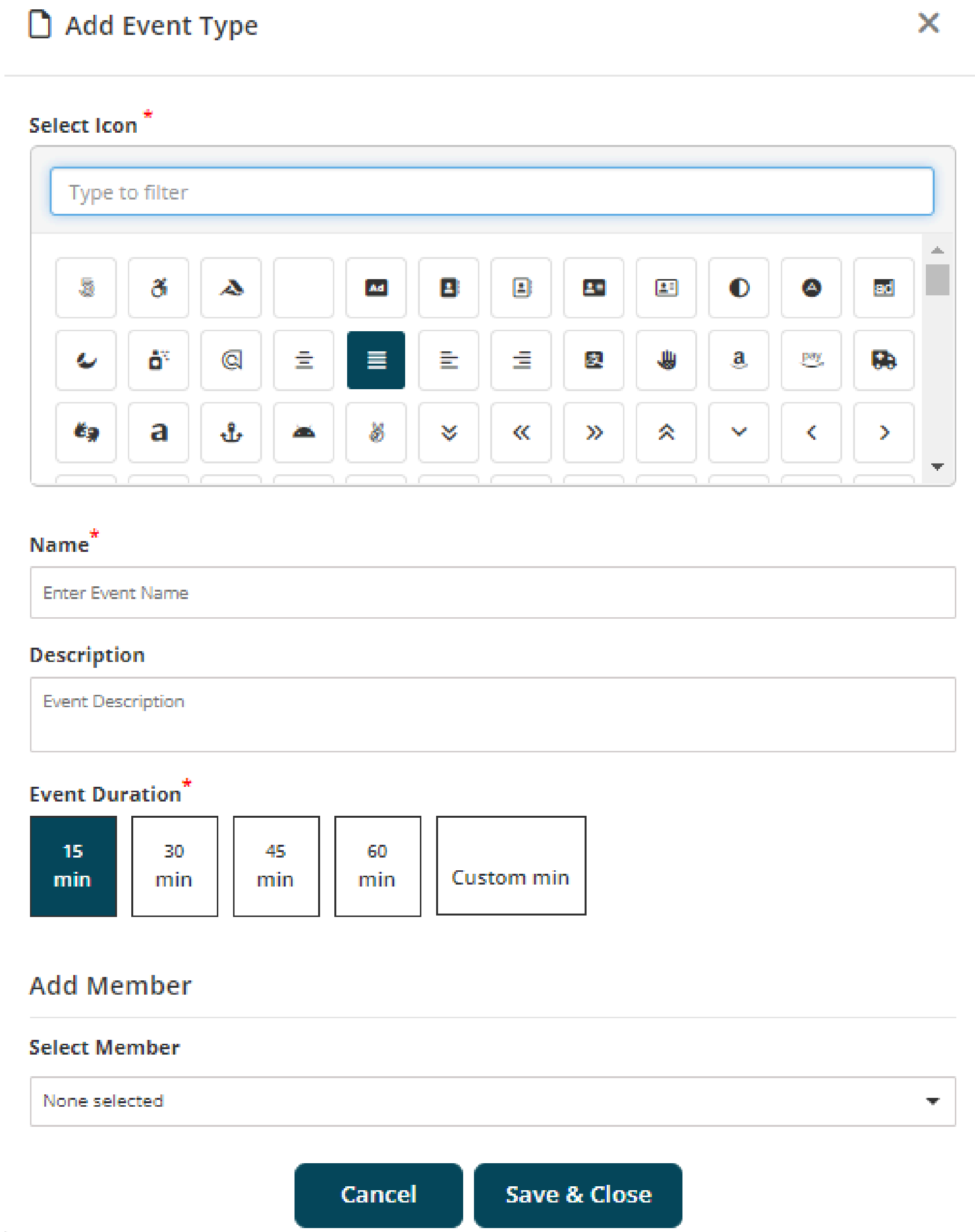
-> **Select icon** : Select an icon among those that are displayed. You can also filter the list.

-> **Name** : You can enter the event name.

-> **Description** : Information regarding the event.

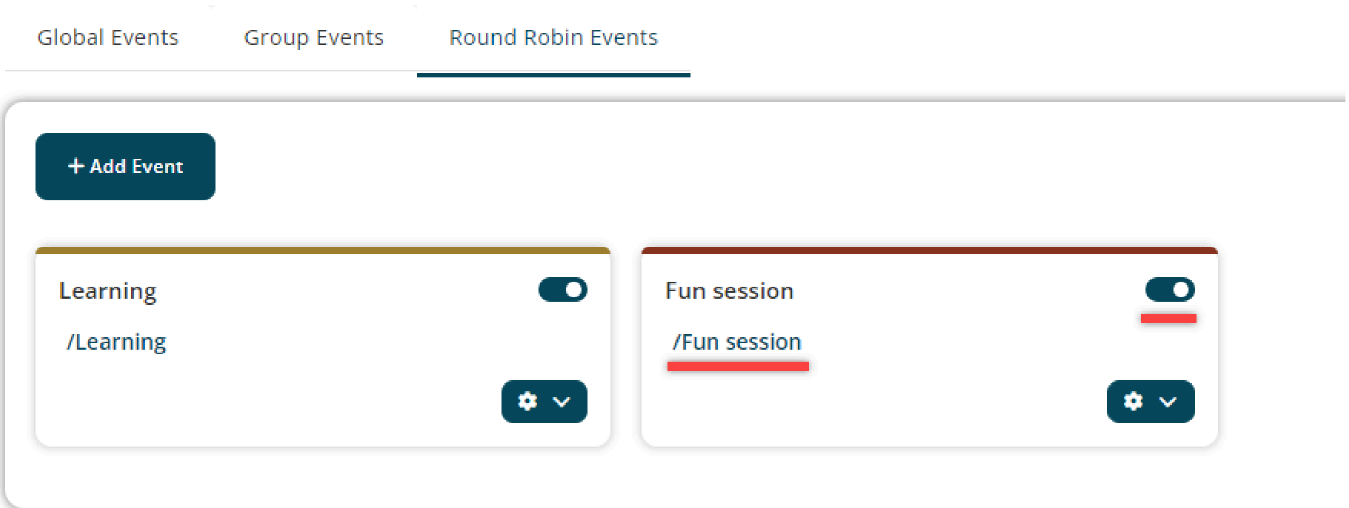
-> **Event Duration** : There are default durations provided. Other than those, you can also add a custom duration.

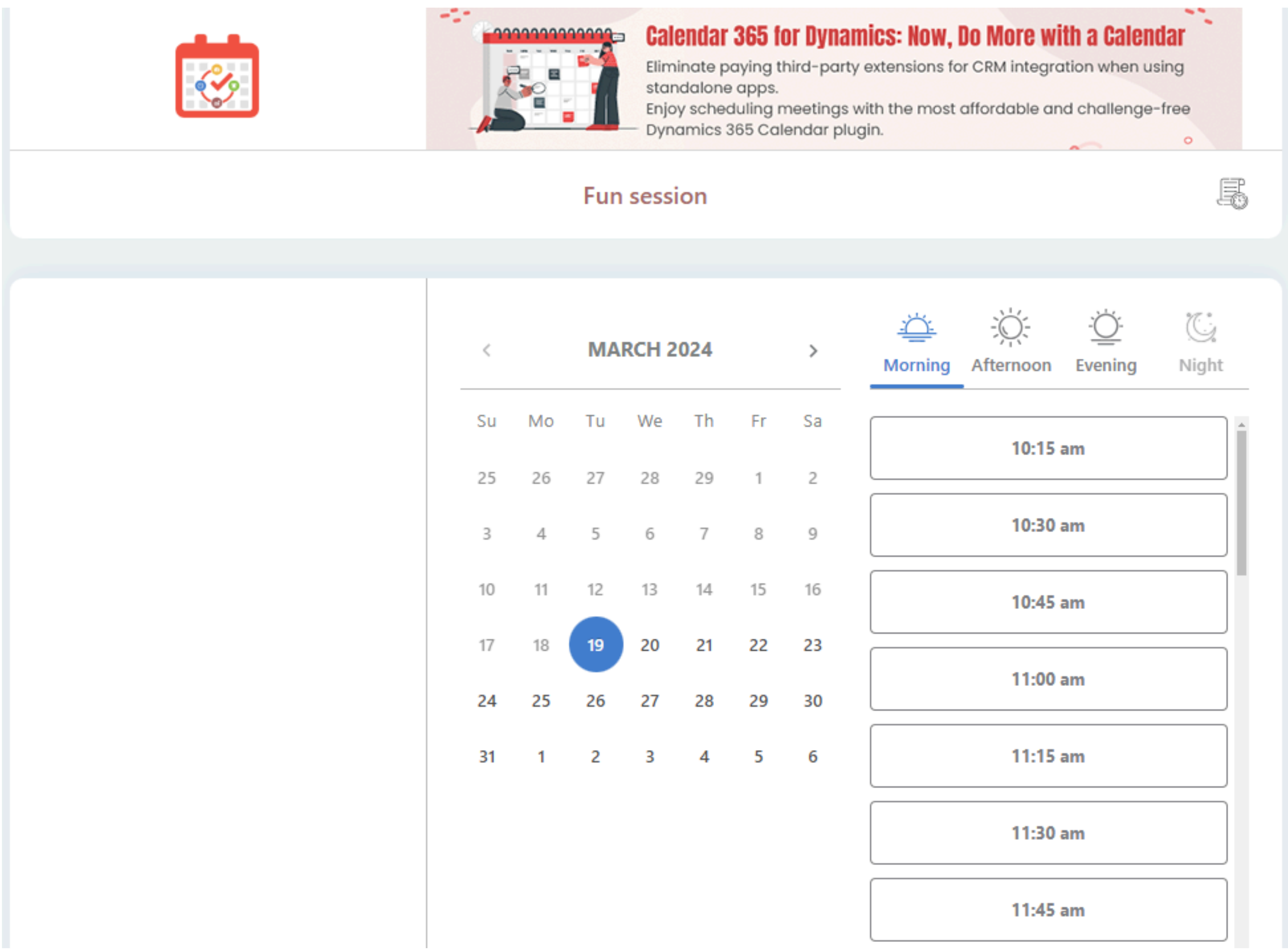
-> **Add Member** : You can add members by selecting from the dropdown.



Once all the details are entered you can **Save & Close** the form and the saved event will be listed in the Round Robin Events section.

You need to enable the event and by clicking on the hyperlink you would be able to navigate to the respective event calendar.


Global Events
Group Events
Round Robin Events
+ Add Event
Learning
/Learning
Fun session
/Fun session


Calendar 365 for Dynamics: Now, Do More with a Calendar
Eliminate paying third-party extensions for CRM integration when using standalone apps.
Enjoy scheduling meetings with the most affordable and challenge-free Dynamics 365 Calendar plugin.
Fun session
MARCH 2024
Su Mo Tu We Th Fr Sa
25 26 27 28 29 1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
31 1 2 3 4 5 6
Morning
Afternoon
Evening
Night
10:15 am
10:30 am
10:45 am
11:00 am
11:15 am
11:30 am
11:45 am

Settings

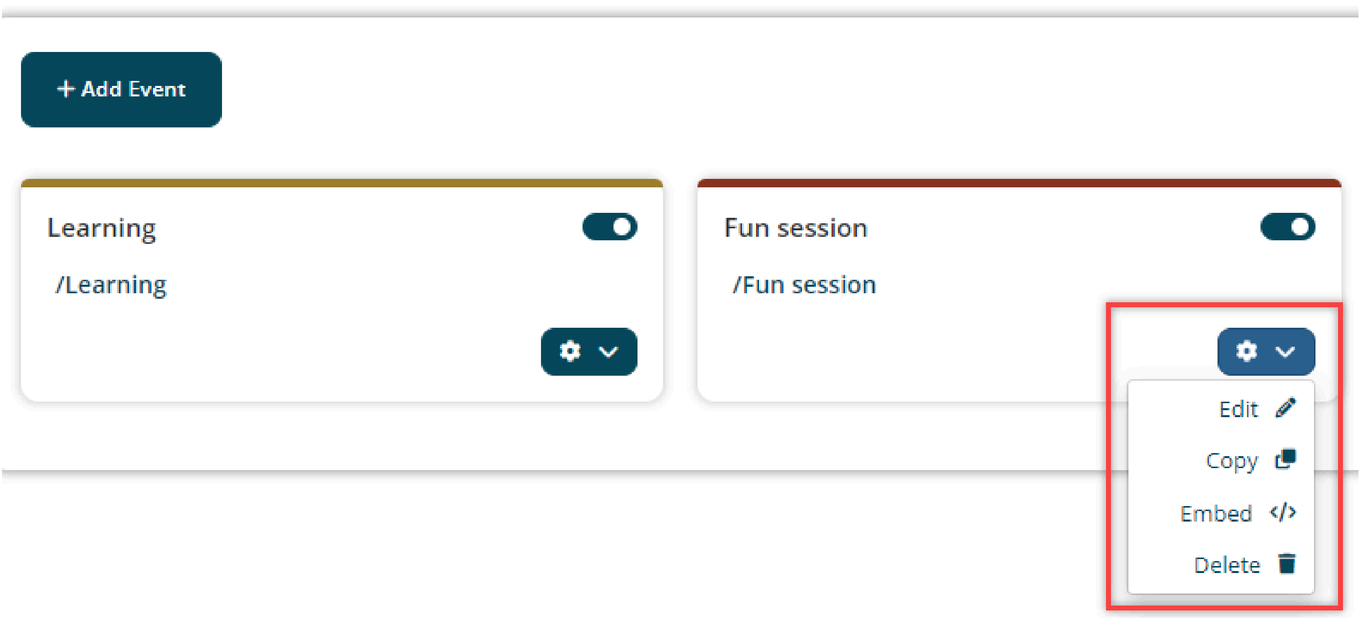
You can perform various actions such as :

Edit -> The update of the event can be done through here. Once all the details are updated you need to "Update & Close".

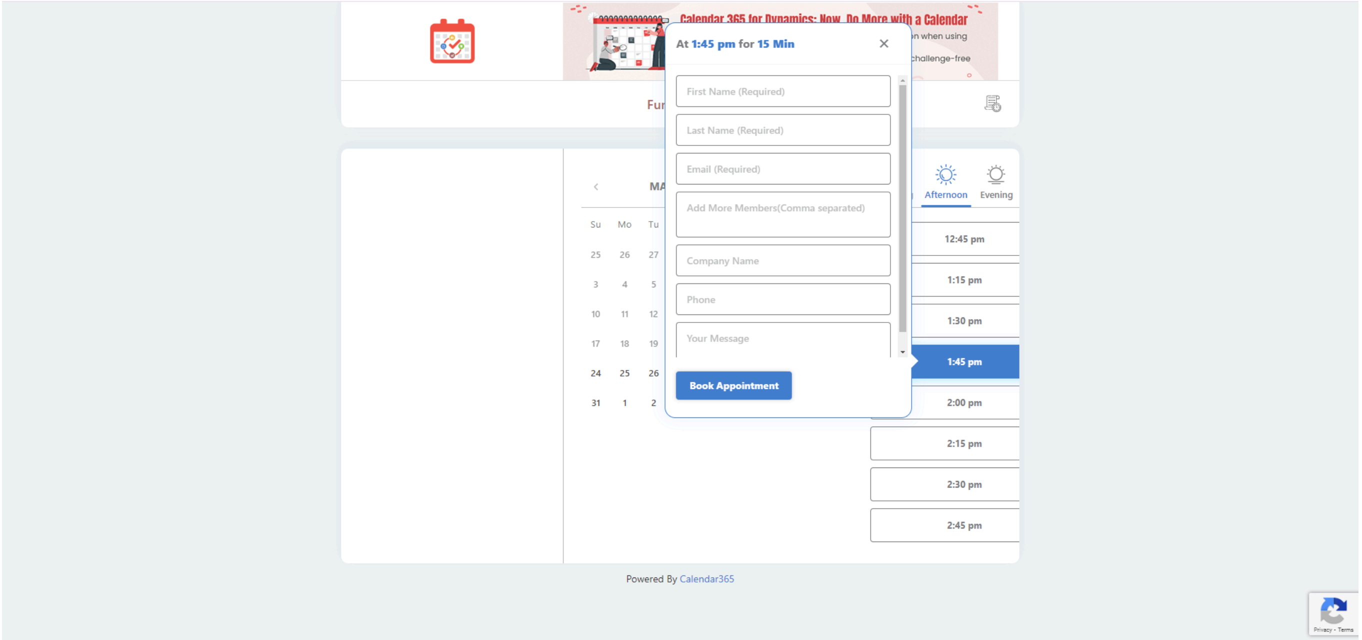
Copy -> Clicking here copies all the details of the current event into a new form.

Embed -> HTML code that you will be able to copy and paste will be shown.

Delete -> You will be able to delete the particular event.

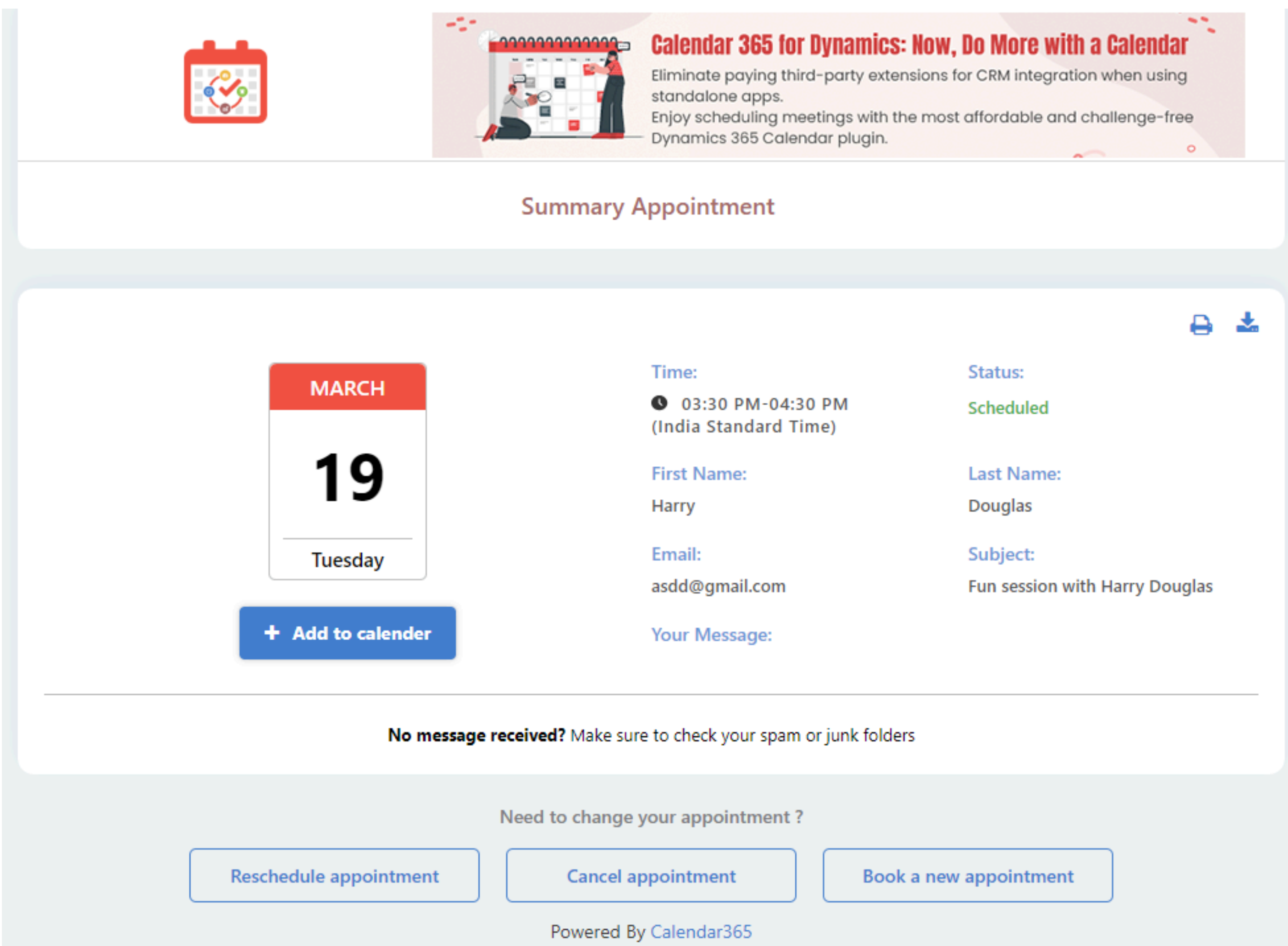


When navigated to the booking link calendar then all the available slots of the respective members will be present.



Clicking on a particular time slot will display a form. Once all the required details have been entered, “Book Appointment” button should be clicked.

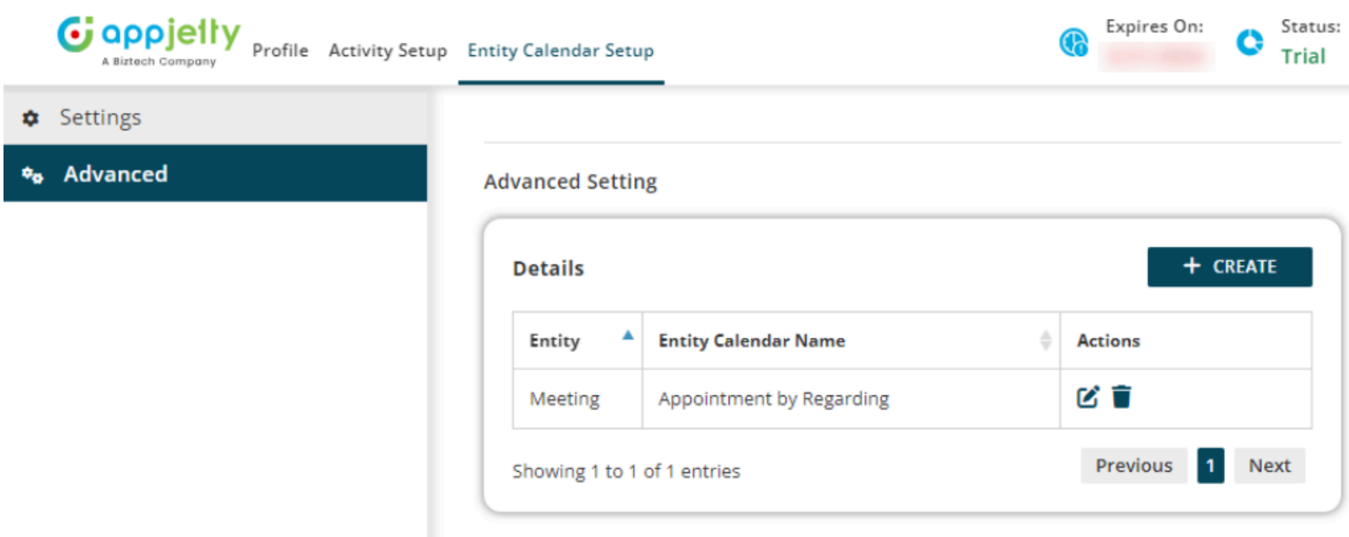
Once the appointment is booked Appointment Summary will be shown.



The respective member(s) will be notified once the meeting is scheduled.

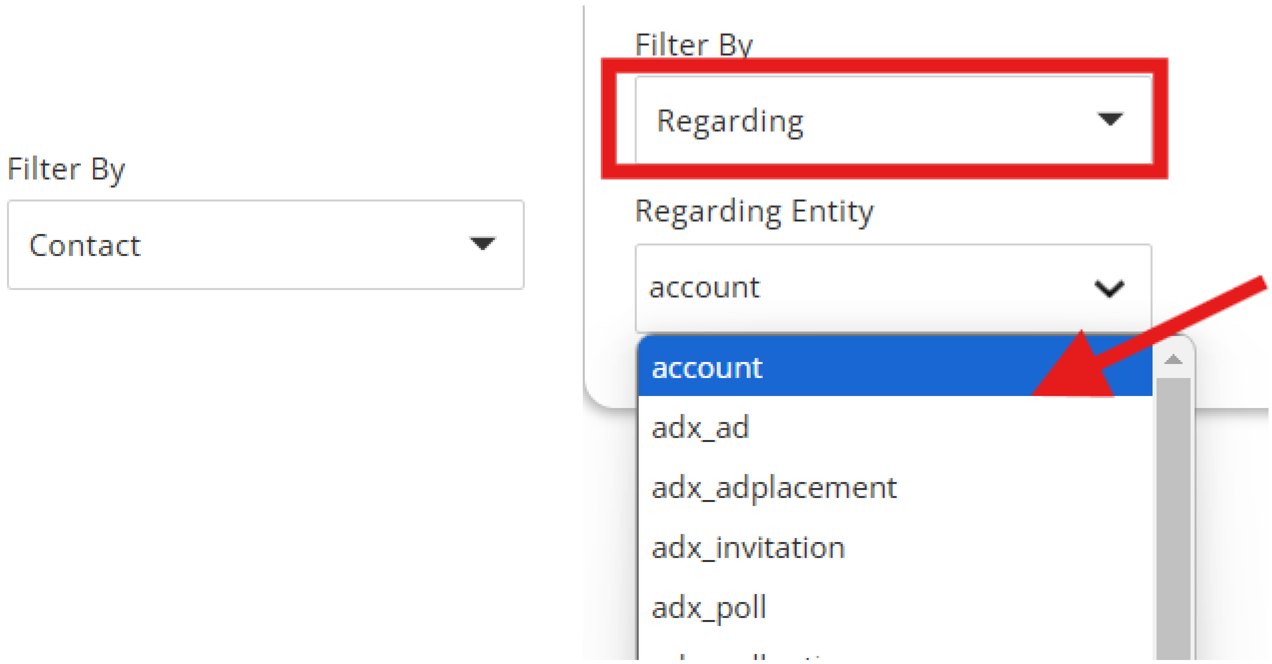
Filter by option for entity calendar

Filter by option for entity calendar can be established by navigating to **Configurations -> Entity Calendar Setup.**



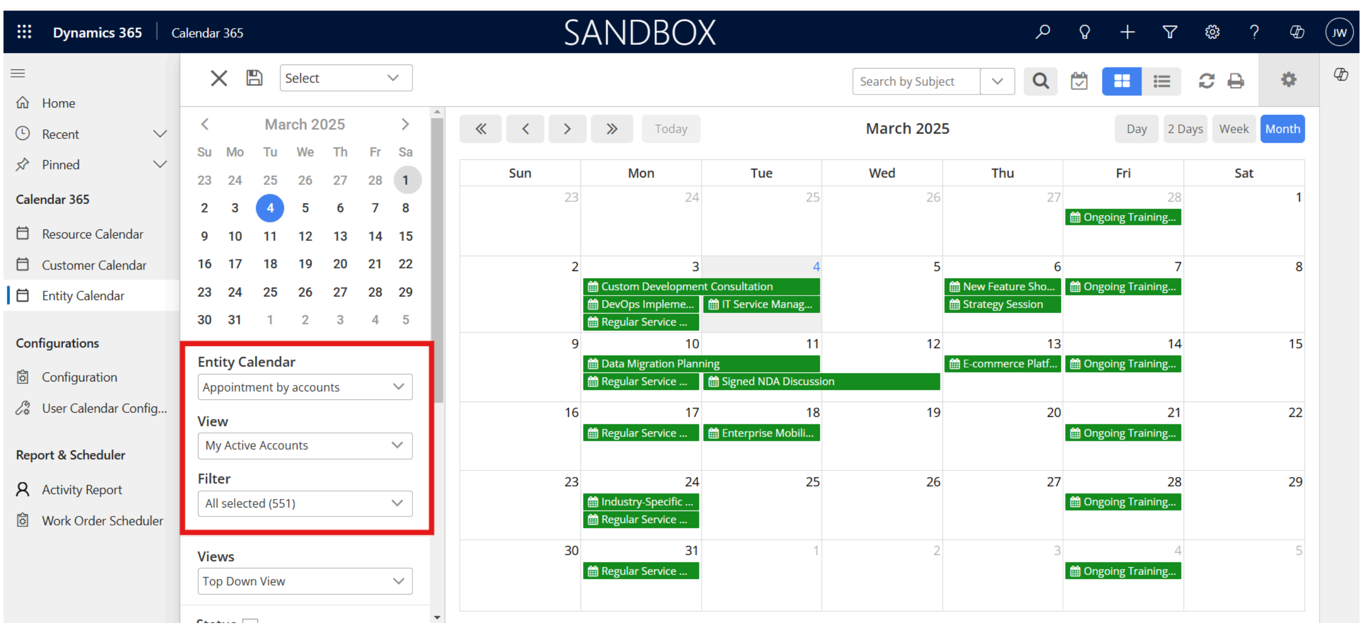
Here you need to navigate to the **Advanced** section and in **Custom Customization** there is a field “Filter By”.

You can filter records by lookup fields using '**Filter By**.' For the Activity entity, when you select **'Regarding'** in 'Filter By,' a list of all related entities will be displayed. From this list, you can select the required entity for filtering.



Once **Saved** the changes, it will be reflected in the **Entity Calendar.**

Saved entity calendars will be listed. When selected, the **View** section will have a dropdown menu accordingly.



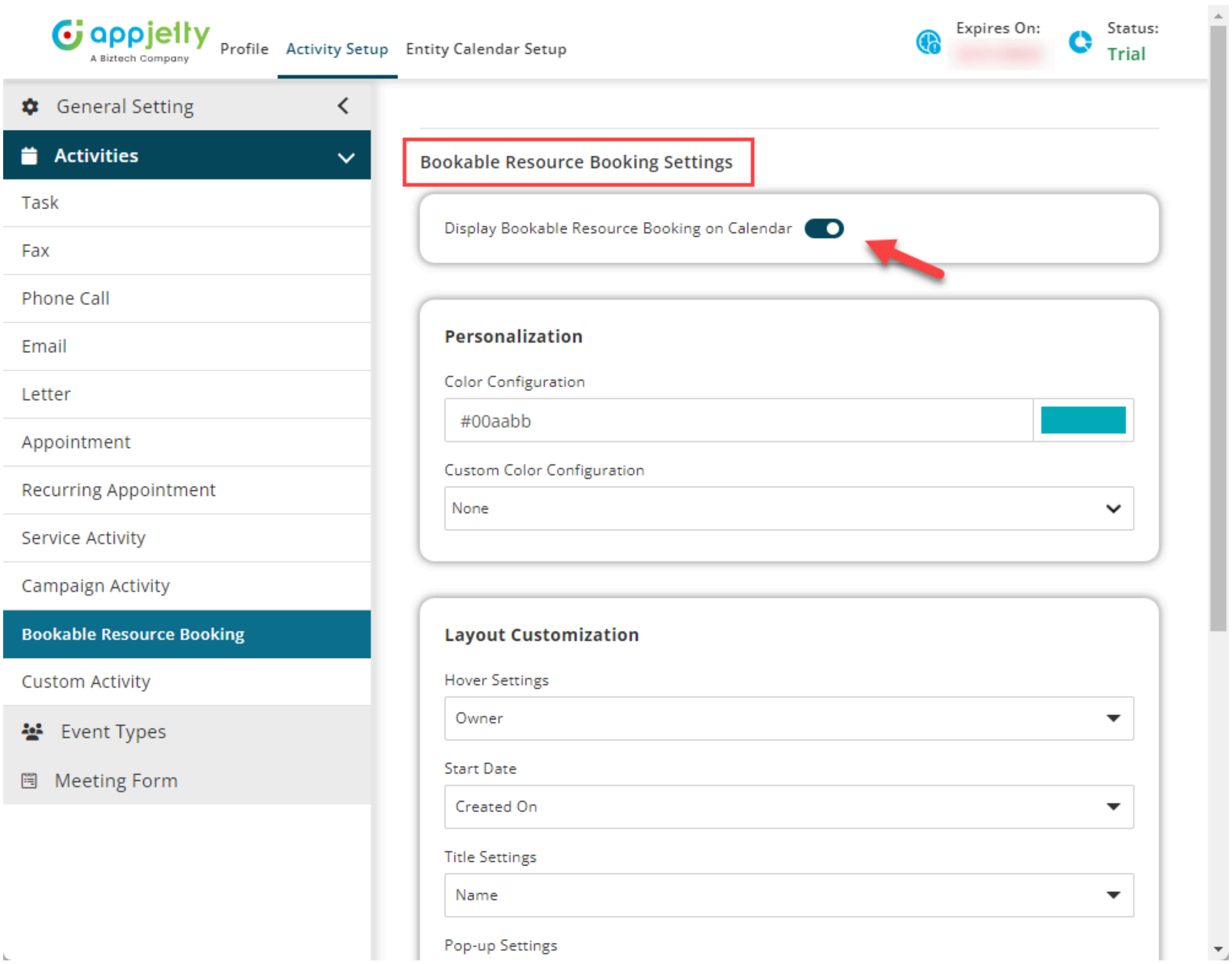
Now once the **View** is selected, the **Filter** section will be listed as per the selection of the **View.**

Schedule unscheduled work order

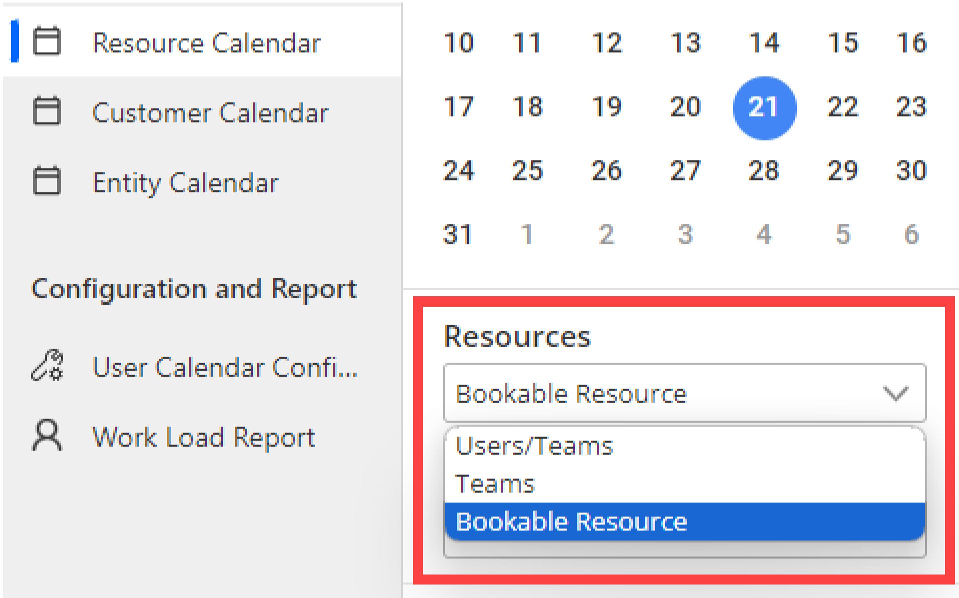
Unscheduled work order can only be scheduled if the field service module in the CRM has been enabled. Also, the bookable resource should be enabled in order to display the booking of the bookable resource.

In order to do so, navigate to **Configurations -> Activity Setup -> Activities -> Bookable Resource Booking.**

In the **Bookable Resource Booking Settings,** you need to enable "Display Bookable Resource Booking on Calendar".

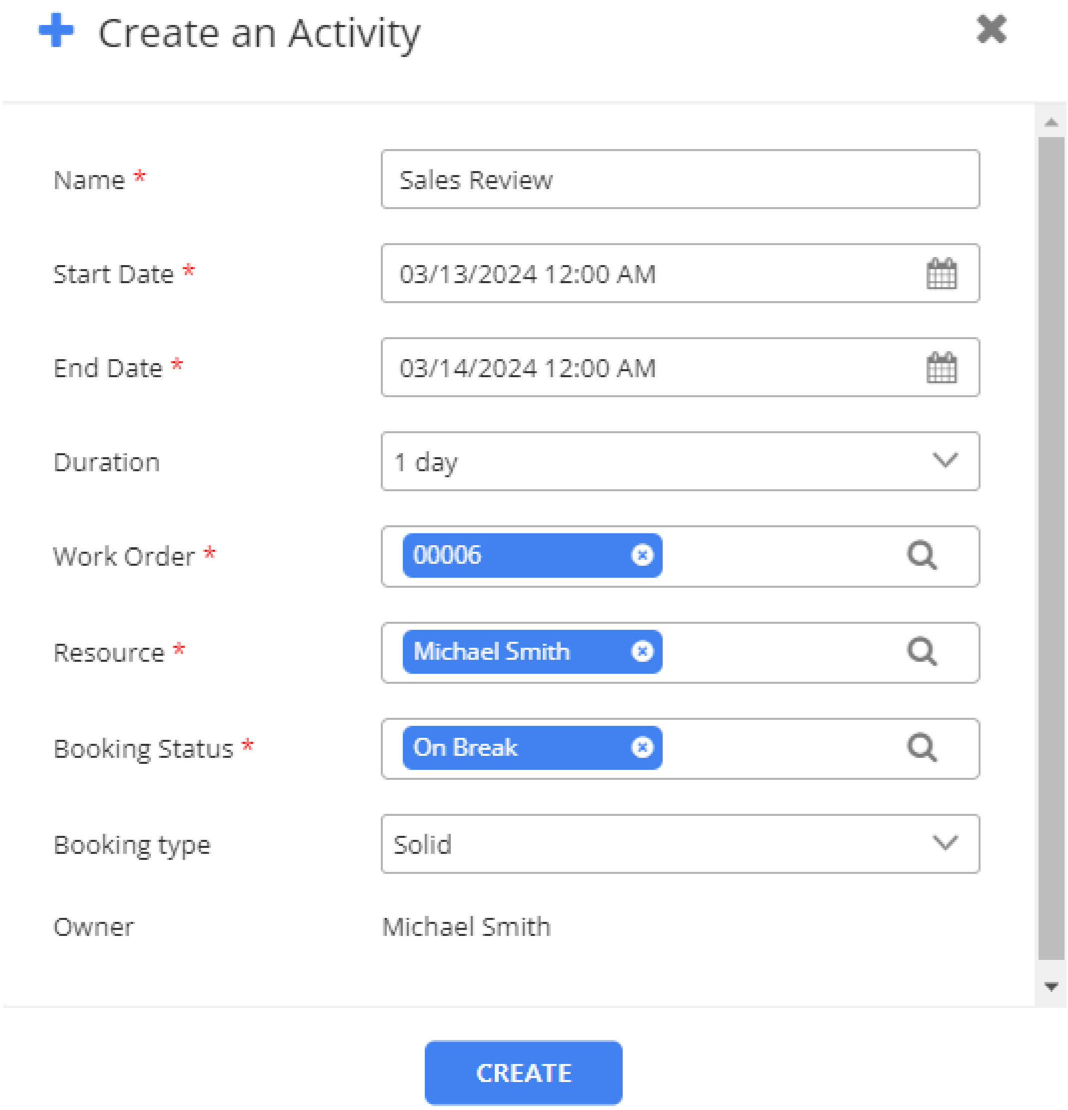


Once enabled the "Bookable Resource" will be listed in the drop down menu of the **Resources** field in the **Resource Calendar.**

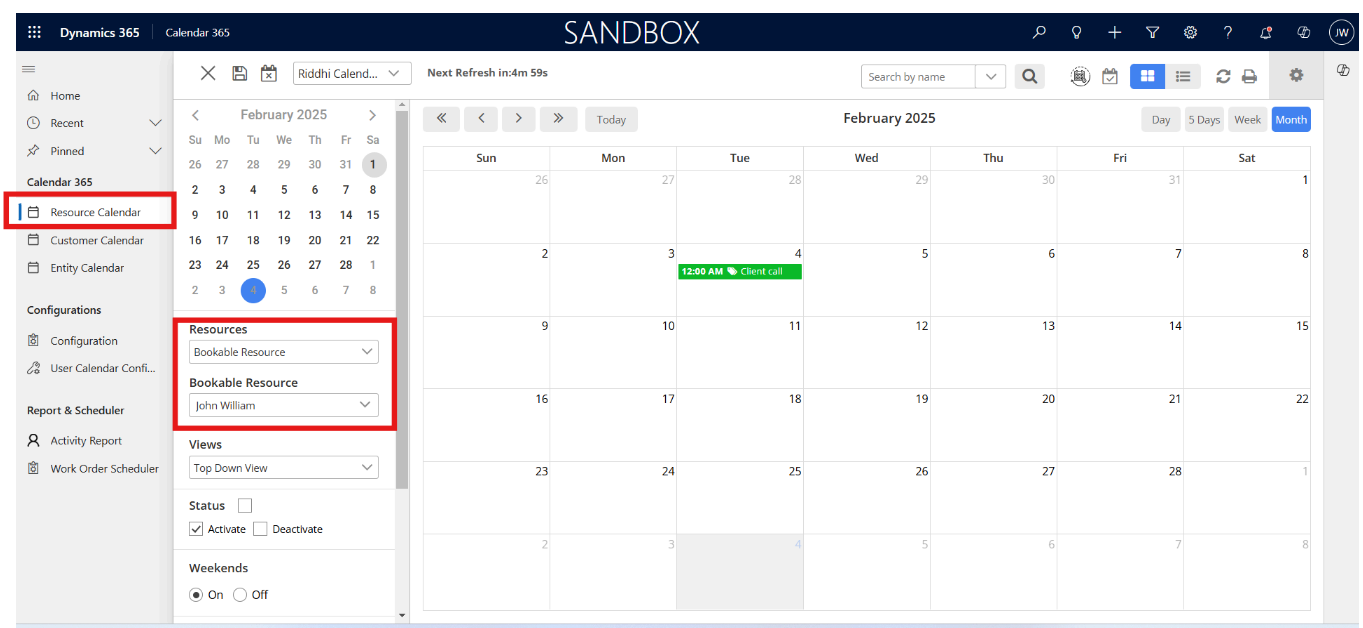


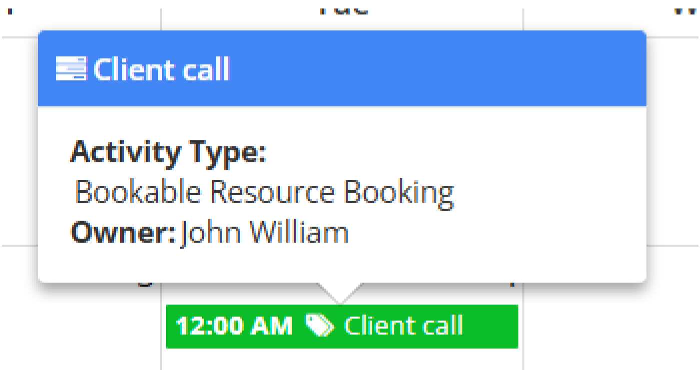
You will be able to create an activity by filling up the following fields :

- **Name :** You have to enter the name here.
- **Start Date & End Date :** Add start and end dates of the activity.
- **Duration :** Time period in which the activity will be conducted.
- **Work Order :** Select the work order from the side panel that will be displayed once clicked on the search icon.
- **Resource :** Add the resources needed for the activity.
- **Booking Status :** Select the booking status.
- **Booking Type :** Select the type of activity from the drop down menu.



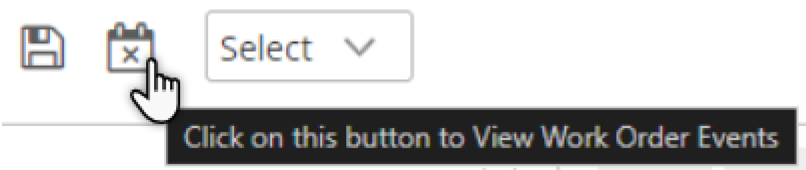
Filling up all the required details and clicking on "Create" would create a new activity. The added activity will be listed in the calendar.



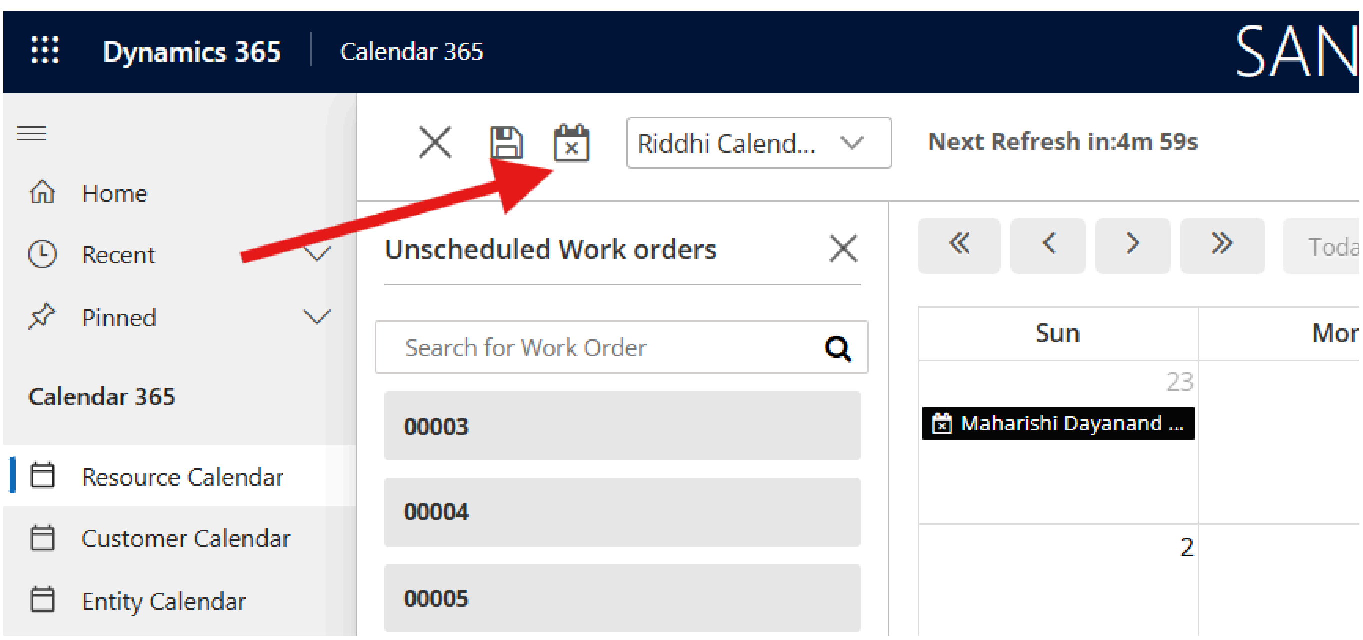


Unscheduled Work Orders

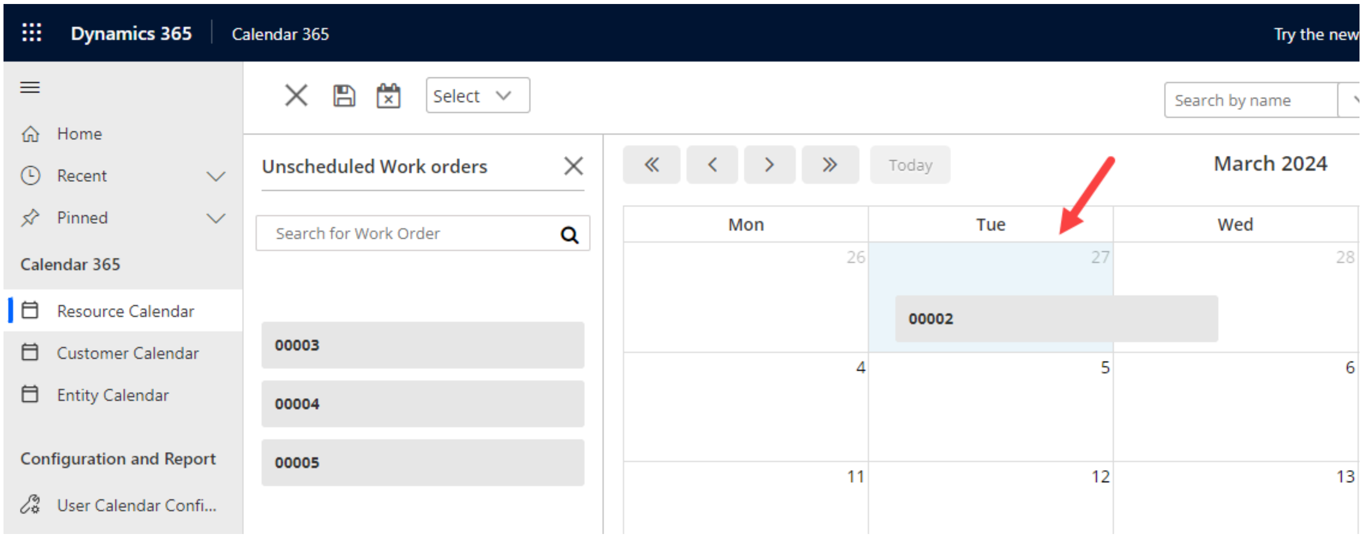
All the unscheduled work orders can be viewed by clicking on the Calendar Icon displayed on the top left side of the page.

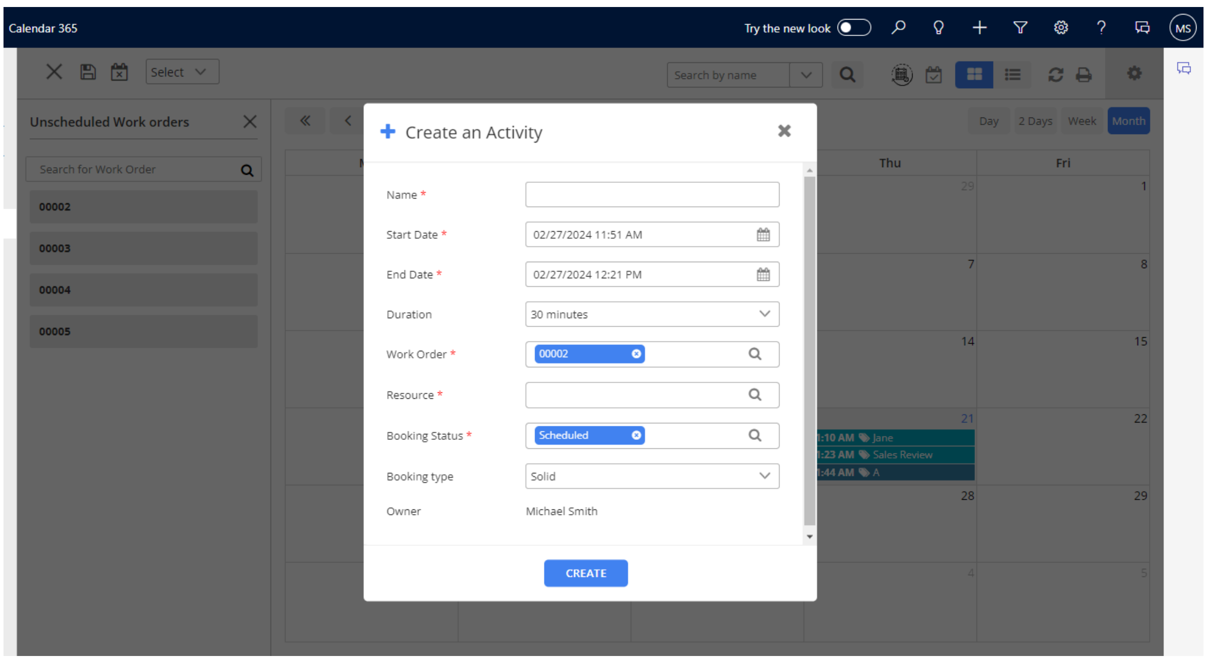


All the unscheduled work orders will be listed. You can as well search for any specific work order.

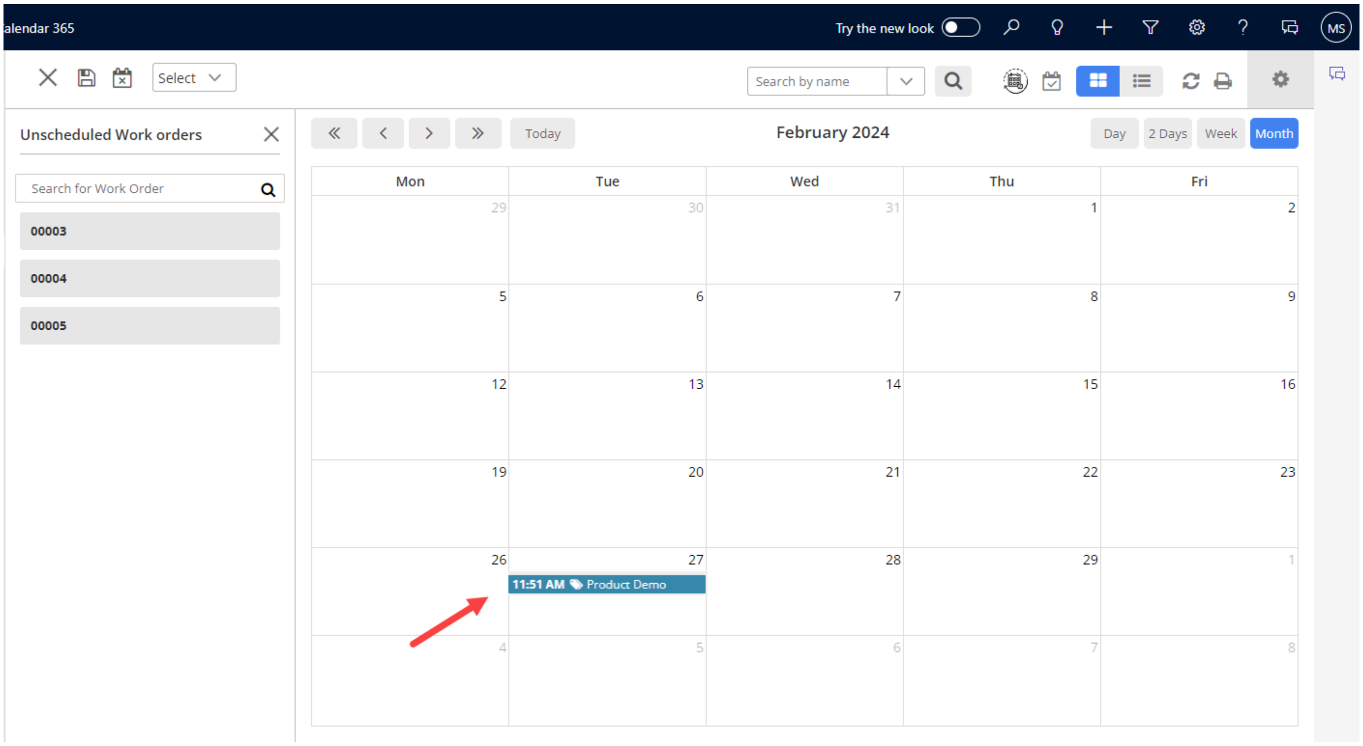


You can schedule a work order by dragging and dropping the work order onto the calendar. Once you drop the work order, a **Create Activity** pop-up will appear where you need to fill up all the required information in order to create a new activity.





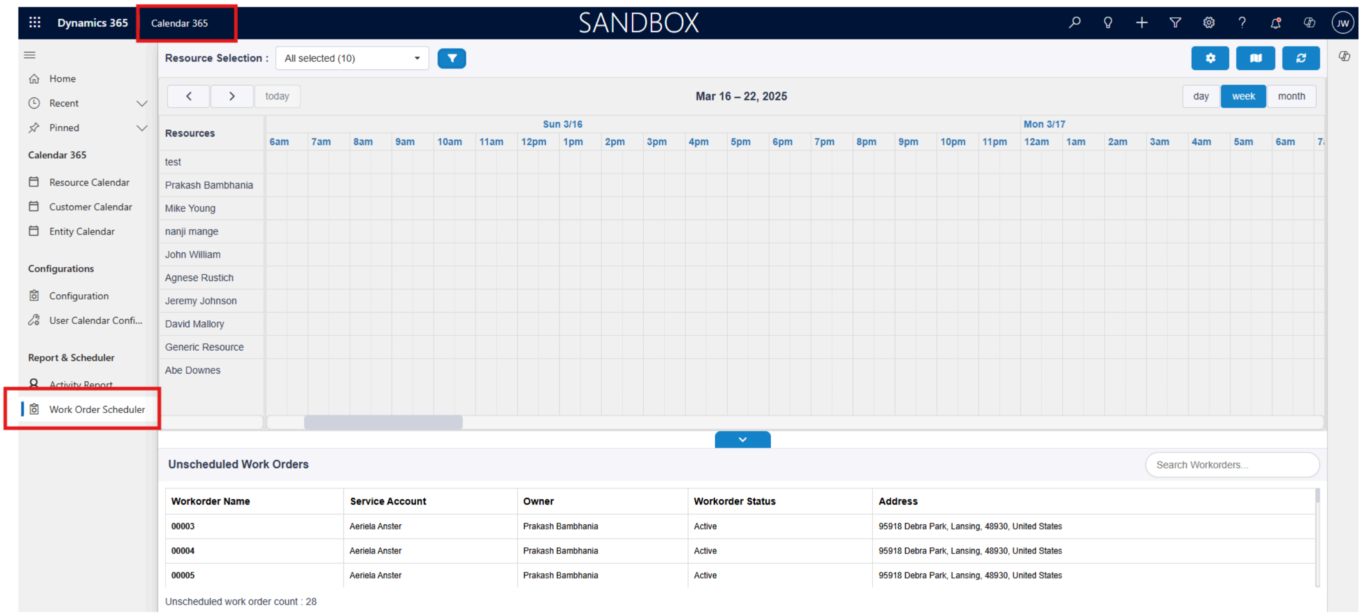
The activity when created will be listed in the calendar and from the Unscheduled Work orders list, that particular work order will not be displayed.



alendar 365
Try the new look
MS
Select
Search by name
Unscheduled Work orders
Search for Work Order
00003
00004
00005
Today
February 2024
Day
2 Days
Week
Month
Mon
Tue
Wed
Thu
Fri
11:51 AM Product Demo

Work order schedular

The **Custom Scheduled Board** is a tailored solution designed to help users effectively schedule their bookings based on unscheduled work orders. This tool provides an intuitive interface for organizing and managing work orders efficiently.



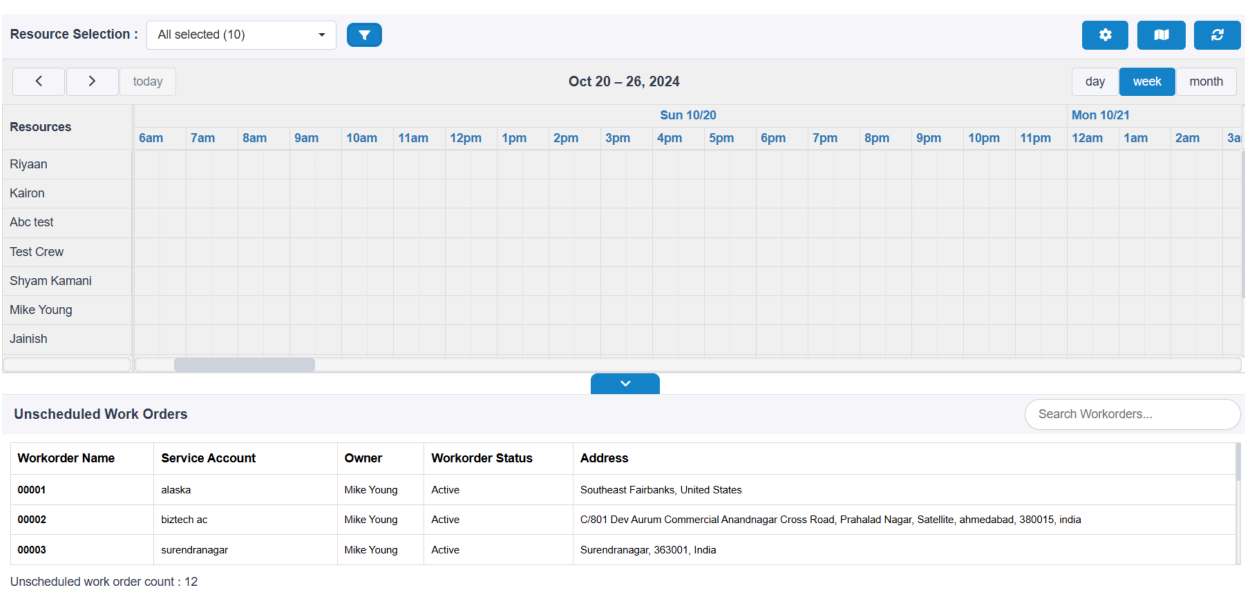
Note:

To use this solution, users must have the following prerequisites:

- Field Service License
- Calendar 365 Installation with an active license
- Calendar 365 Configuration with Azure Maps

Supported Devices

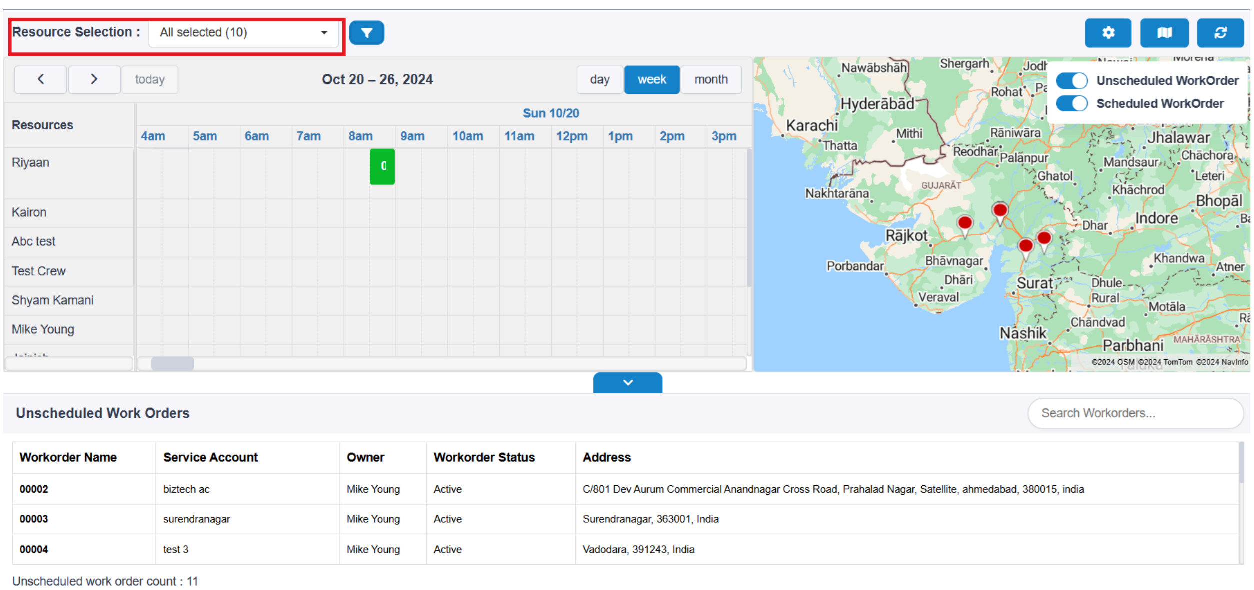
The Custom Scheduled Board is compatible with **desktop and laptop screens.**



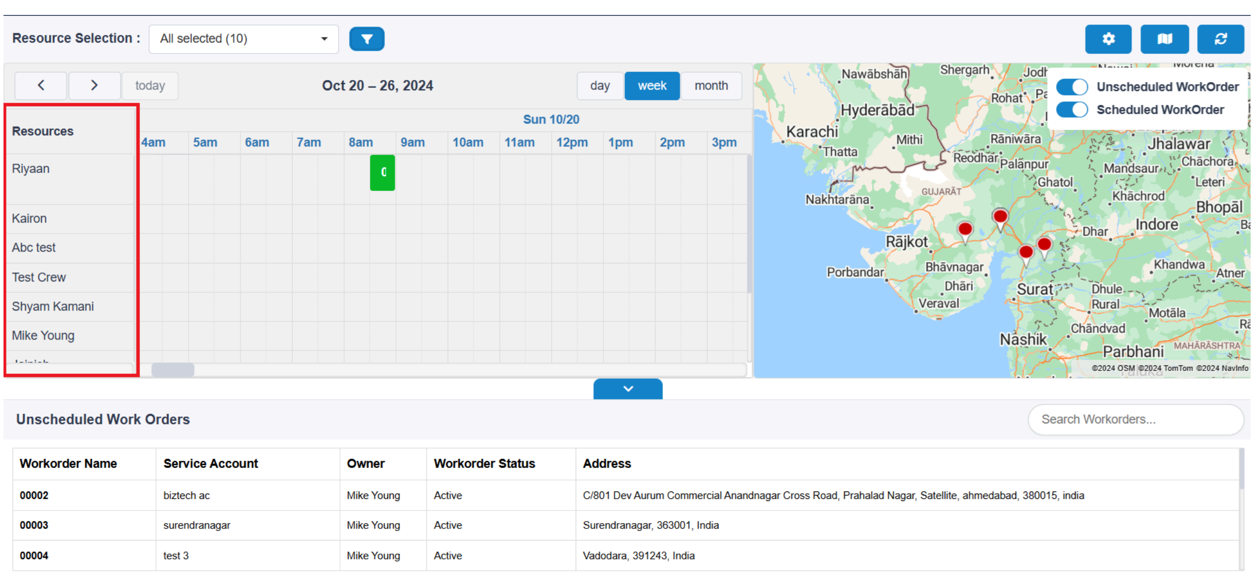
This is the interface of our **Custom Scheduled Board**, designed to initially load and display the following key elements:

- **Unscheduled Work Orders:** All pending work orders that are yet to be scheduled.
- **Scheduled Work Orders:** Work orders that have already been assigned specific dates, times, and resources.
- **Bookable Resource Bookings:** Information on available resources, including assigned bookings and availability.
- **Calendar View:** An intuitive calendar interface for easy scheduling and time management.
- **Azure Map Integration:** Provides geographical context to help visualize booking locations.

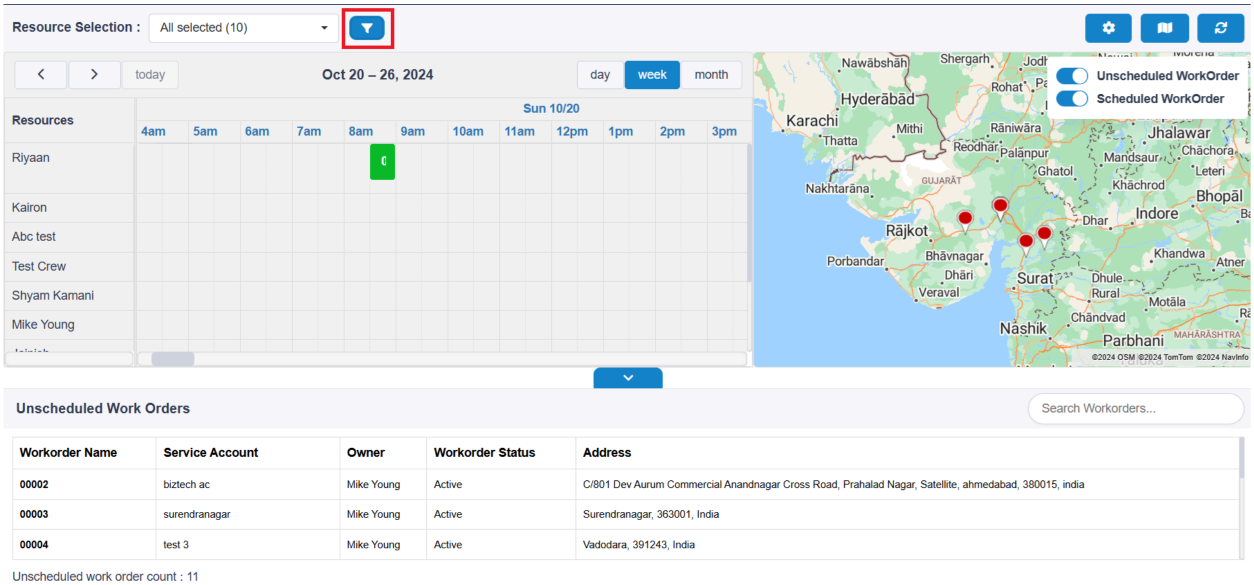
Resource Management



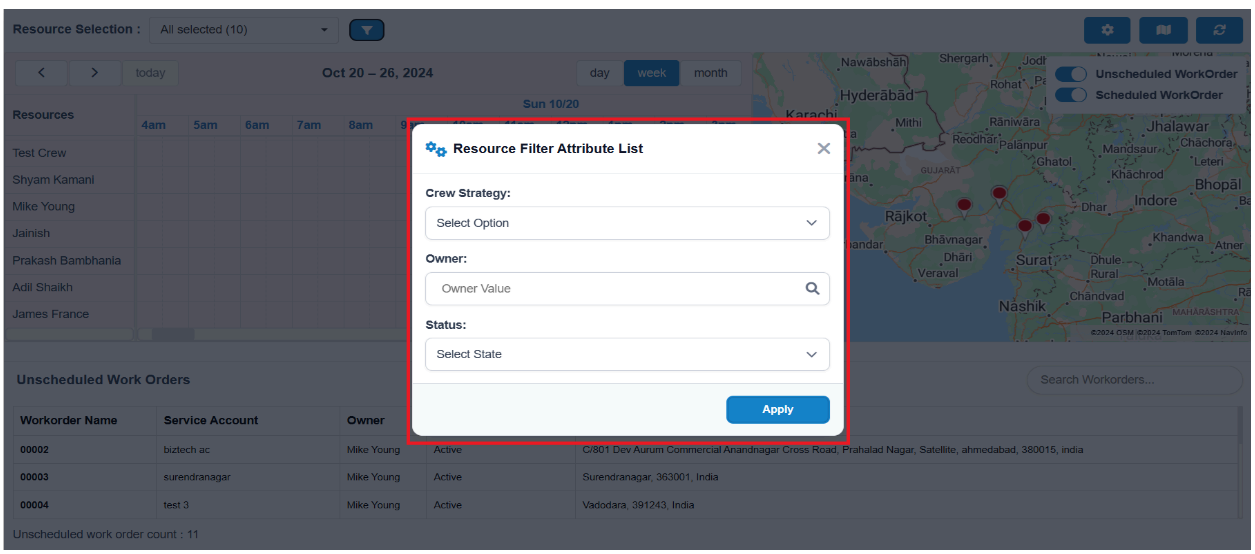
The Resource Selection Field is a multi-select option that lists all available users. Users can choose one or multiple resources from this list. Once selected, these resources are displayed in the Calendar Resource Section for easy scheduling and management.

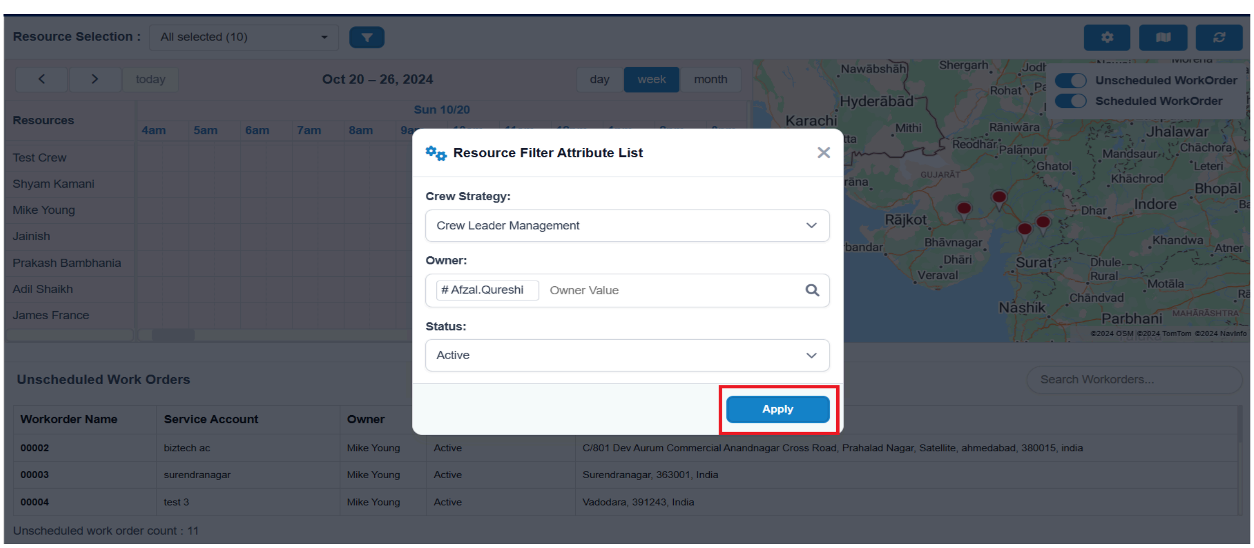


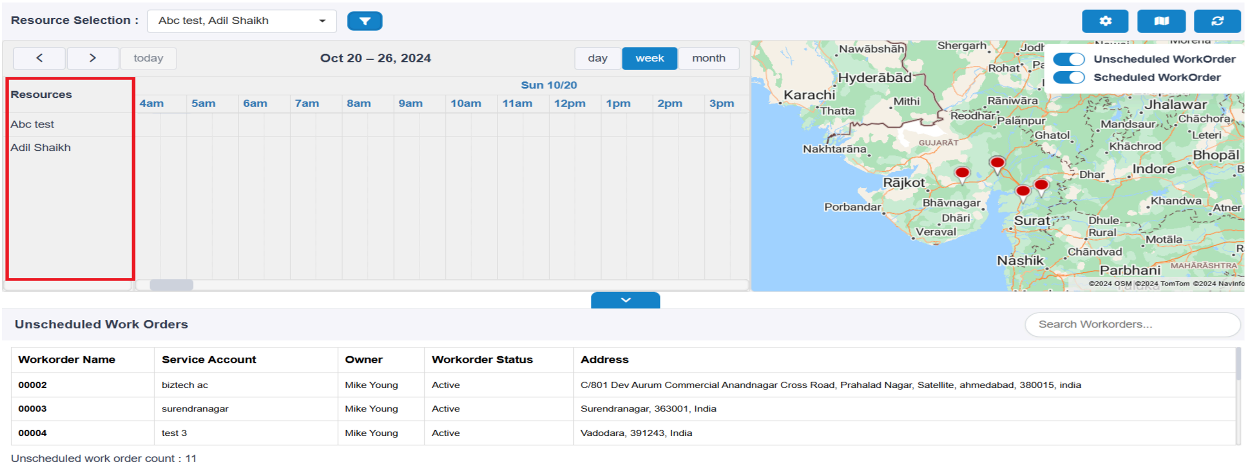
Upon clicking the button, a Filter Form opens, displaying various fields that can dynamically bind based on configuration settings.



Users can fill in values according to each field's type, enabling targeted filtering. After filling in the desired criteria, clicking the Apply Button filters the resources displayed in the calendar resource section.







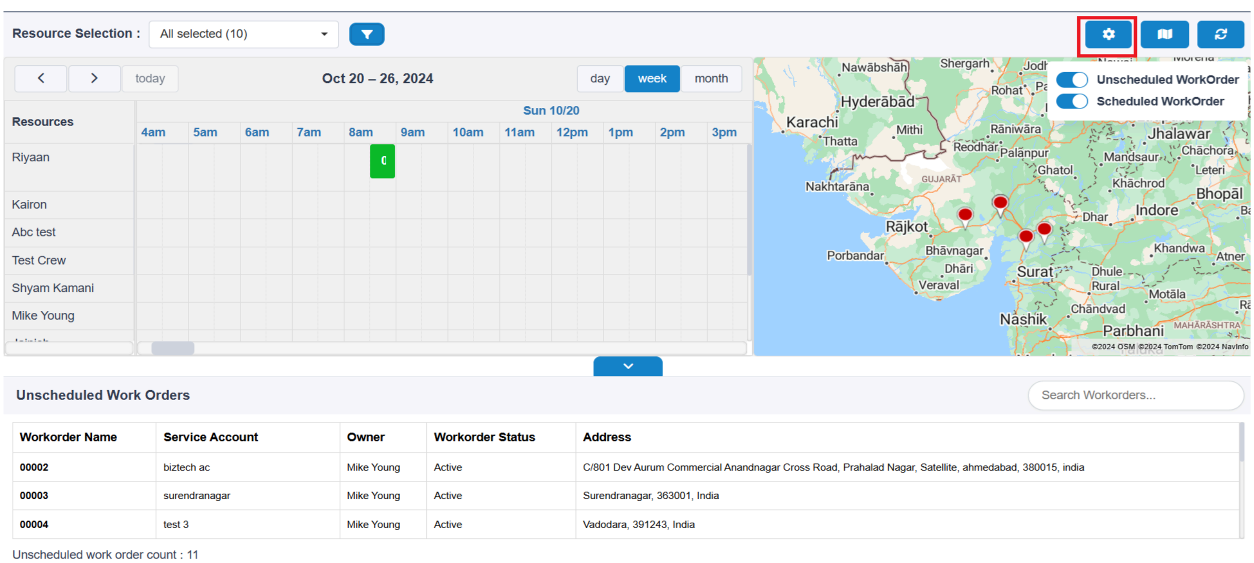
To manage filter fields efficiently, users can access Configuration Settings from the Settings menu.

Within Configuration Settings, users have control over key customization options:

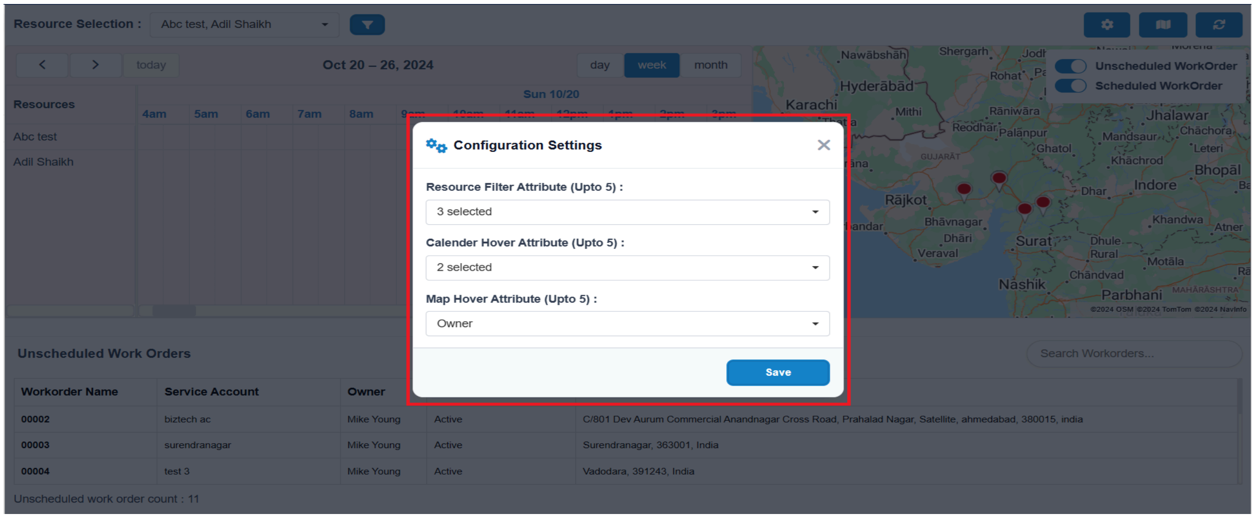
- **Resource (Bookable Resource) Filter Field:** Configure the specific fields that appear when filtering resources, making it easier to refine search criteria.
- **Calendar Event (Bookable Resource Bookings) Hover Field:** Select and display relevant details when hovering over events in the calendar, giving users quick insights into bookings.
- **Map Pushpin (Scheduled/Unscheduled Work Order) Hover Field:** Customize the details shown when hovering over map pushpins, enhancing work order visibility on Azure Maps.

These settings enable precise control over what information is displayed, streamlining scheduling and navigation across the Custom Scheduled Board.

This setup allows for a tailored interface that aligns with unique user and business needs.



To apply all configuration settings, users need to click the **Save Button**. This action saves the settings as a one-time configuration, which users can update anytime as needed.



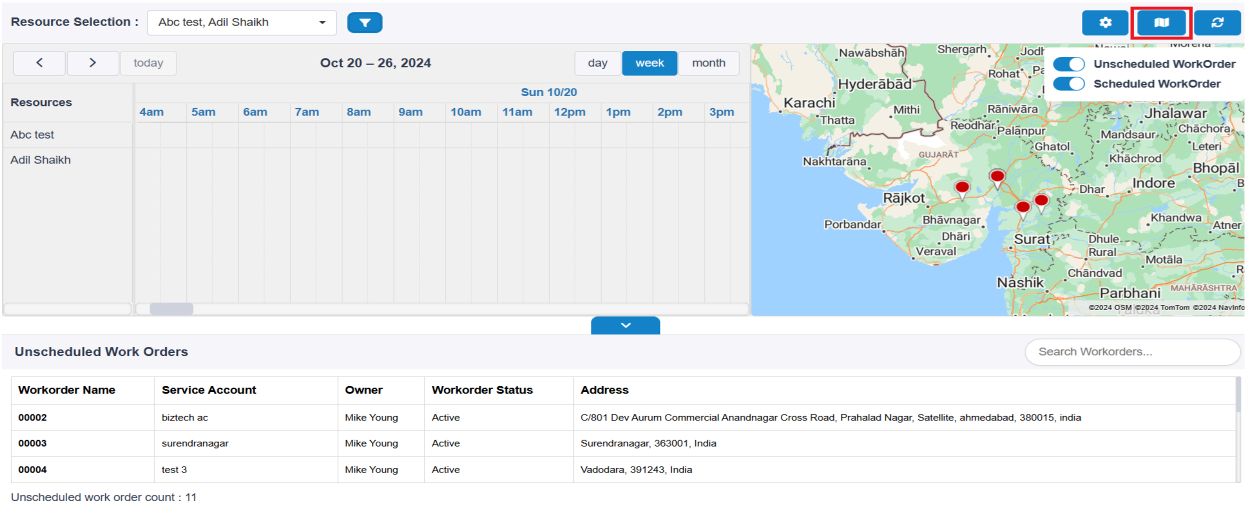
Once saved, the custom settings will be applied across the **Custom Scheduled Board**, ensuring that all selected filters, calendar hover fields, and map pushpin hover fields are displayed according to user preferences.

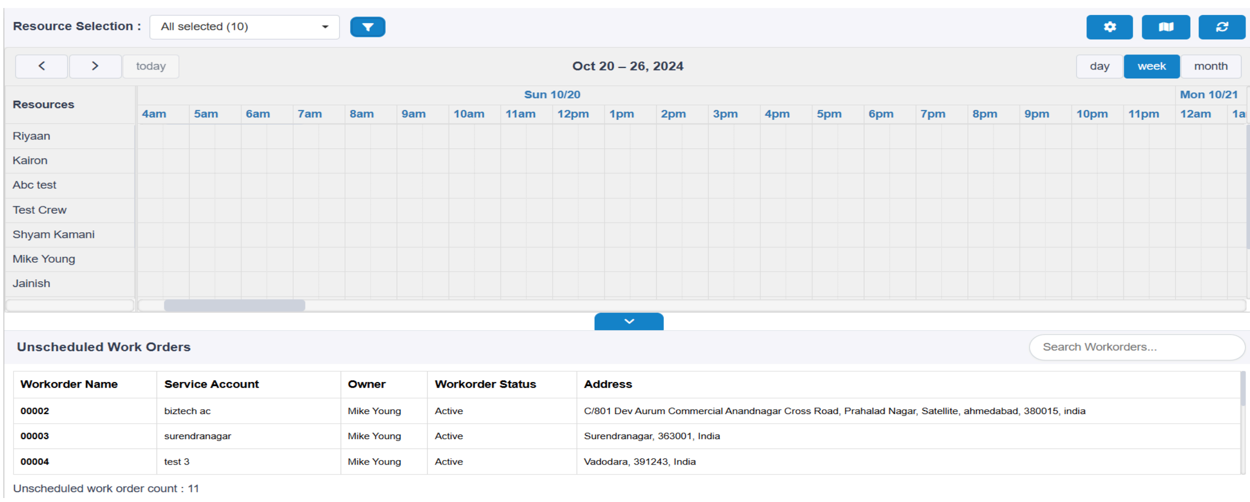
To toggle the visibility of the map according to user preferences, click the **Show/Hide Map Button**.

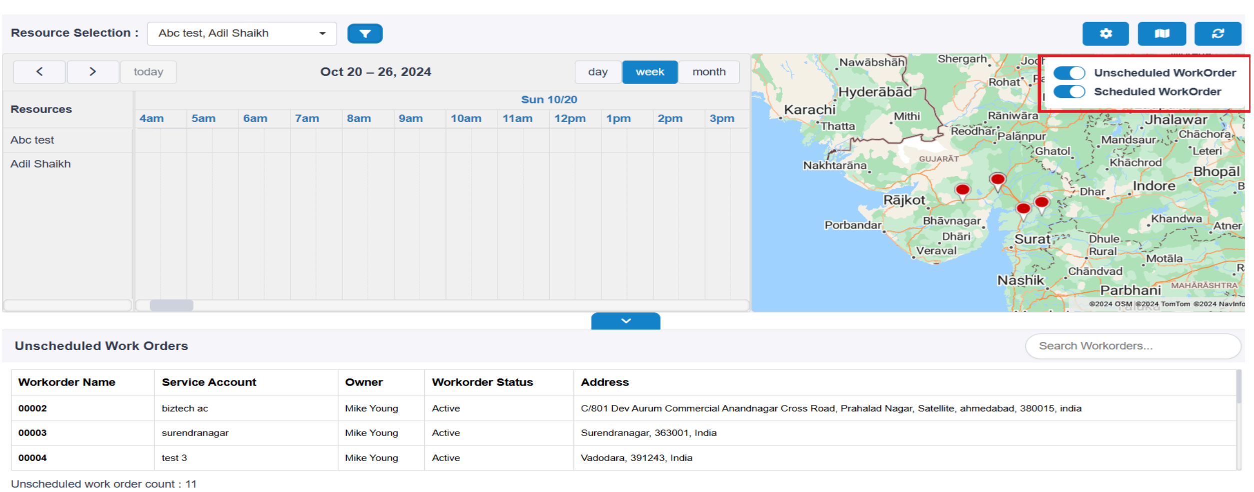
Within the map, there are two toggle switches:

- **Scheduled Work Orders**: Toggle this switch to display or hide scheduled work orders on the map.
- **Unscheduled Work Orders**: Toggle this switch to show or hide unscheduled work orders as desired.

These toggle switches allow users to control which work orders are visible on the map, ensuring a customized and efficient view.

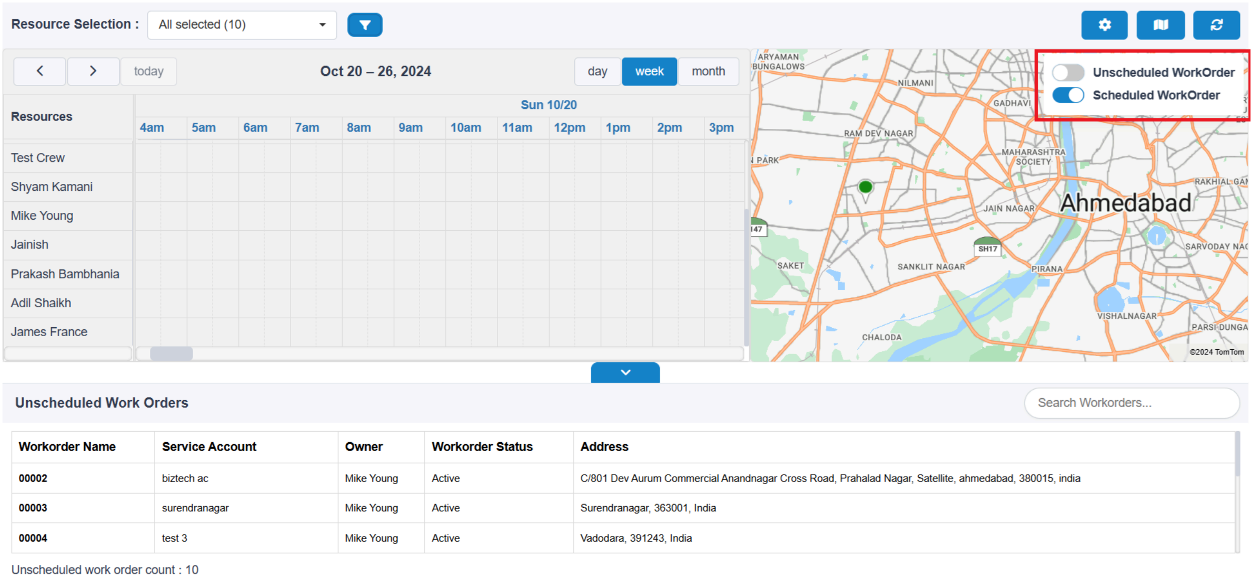




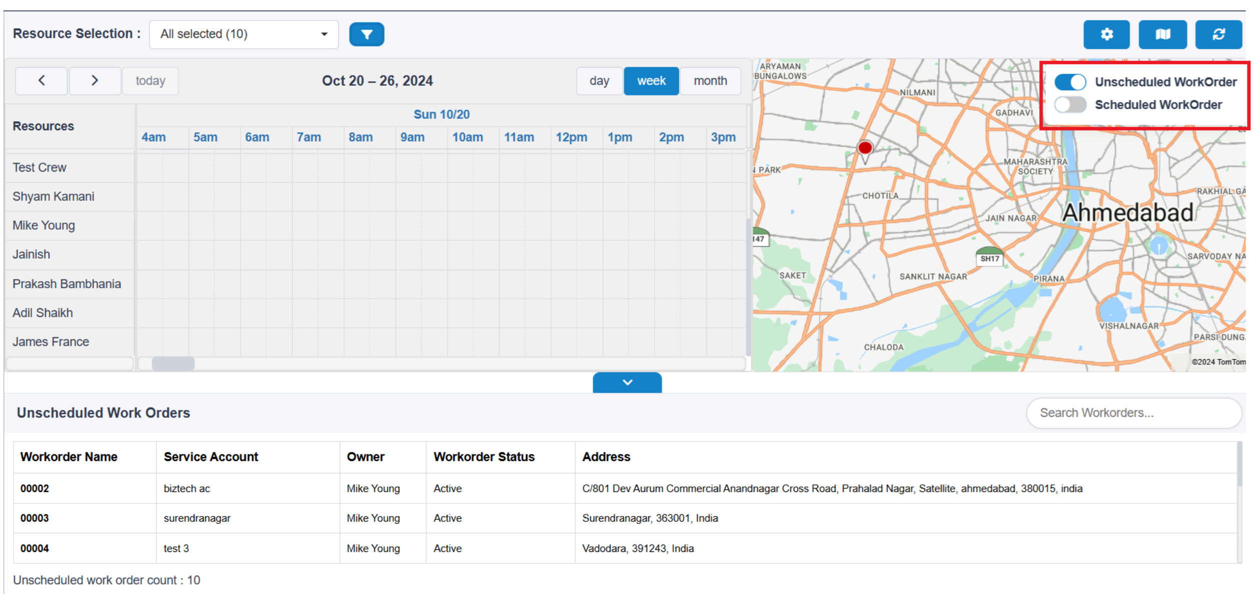


These toggles help users display specific work orders on the map:

- **Scheduled Work Orders**: Displayed with green pushpins, as shown in the image below. This allows users to easily identify and focus on scheduled tasks.

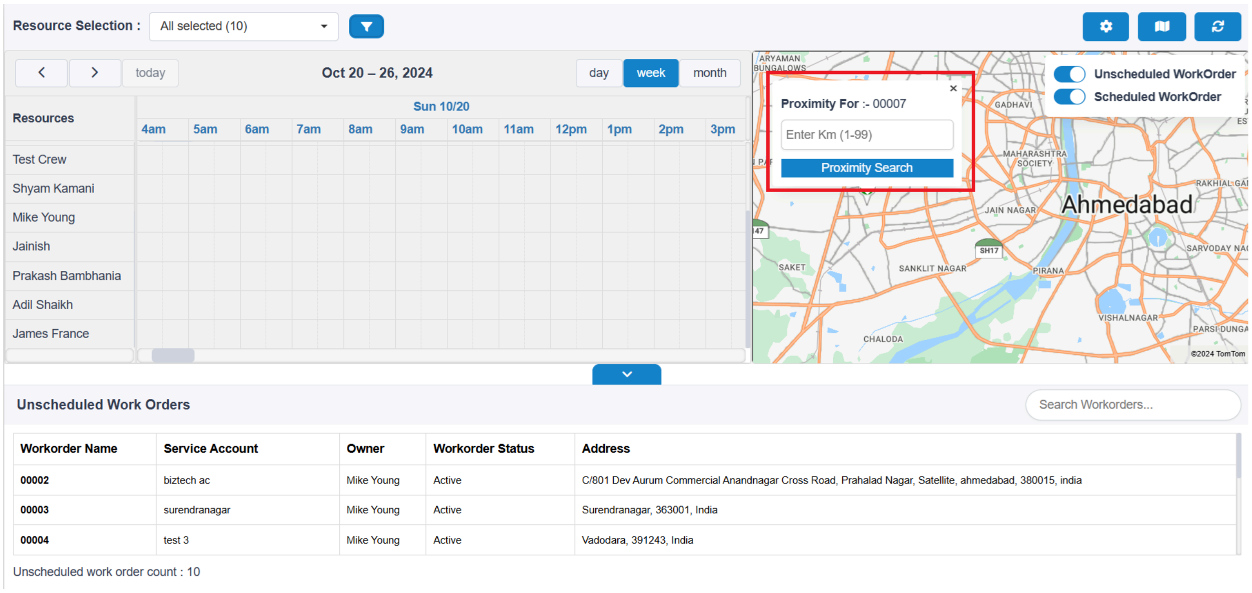


- **Unscheduled Work Orders**: Displayed with red pushpins, as shown in the image below. This helps users spot tasks that still need scheduling.



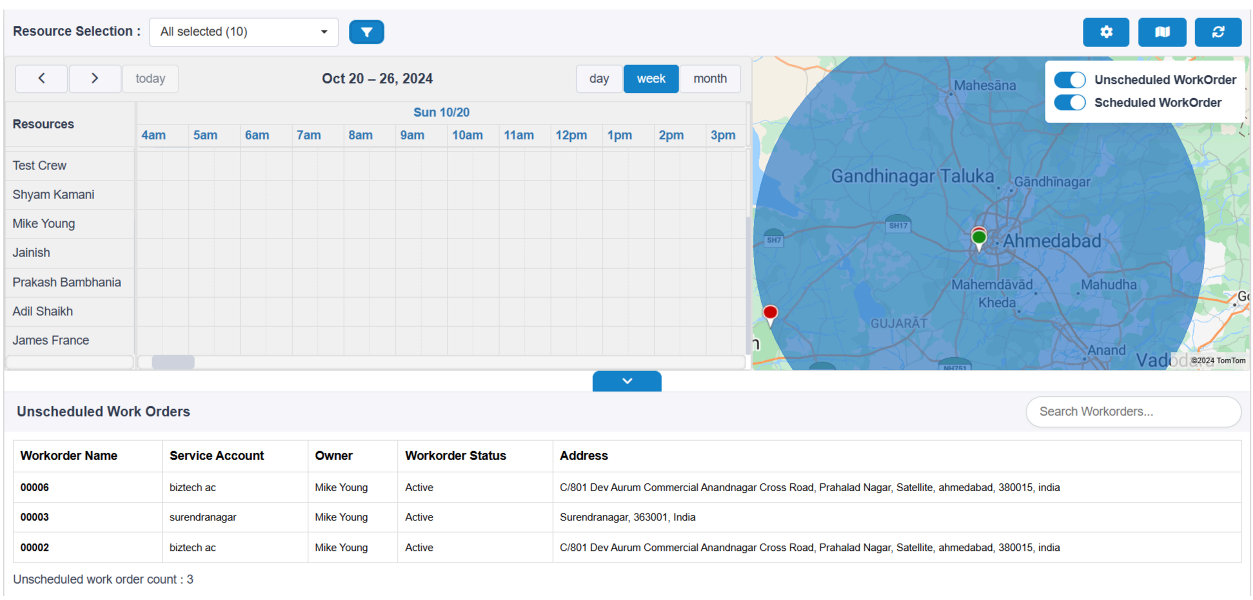
These color-coded pushpins provide a clear visual distinction between scheduled and unscheduled work orders for streamlined planning.

Users can apply a **Proximity Filter** by clicking on a pin to perform a radius-based search, ranging from **1 to 99 km** for both scheduled and unscheduled work order pins. This feature allows users to easily identify nearby work orders based on their selected pin:

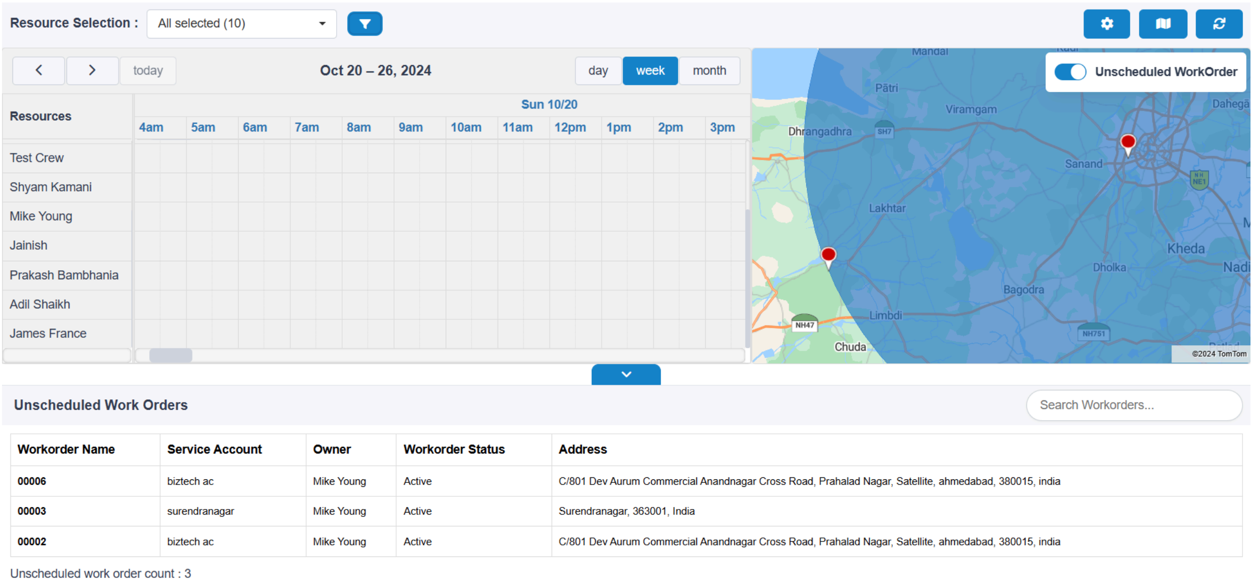


To perform a proximity search, enter a value in the textbox and click on the **Proximity Search Button.**

Scheduled Work Order Pin: When selected in the proximity filter, the search displays all unscheduled work orders within the specified radius. The **Unscheduled Work Order grid** is then updated to reflect only these nearby, unscheduled tasks.



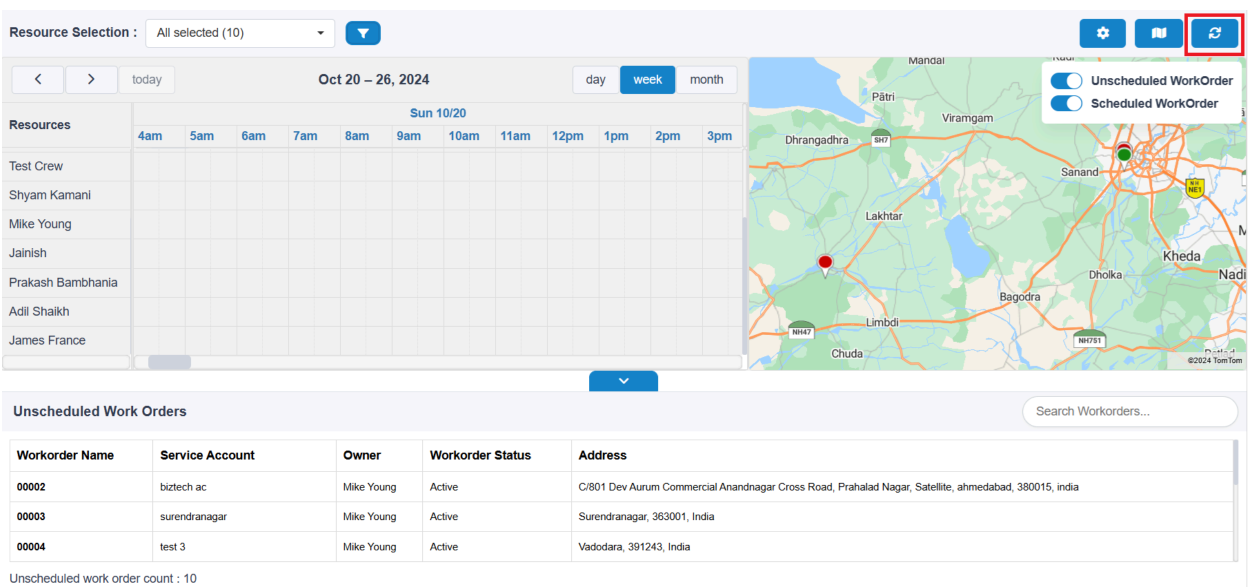
Unscheduled Work Order Pin: Similarly, when an unscheduled pin is selected in the proximity filter, the search displays nearby unscheduled work orders within the specified radius, updating the **Unscheduled Work Order grid** accordingly.



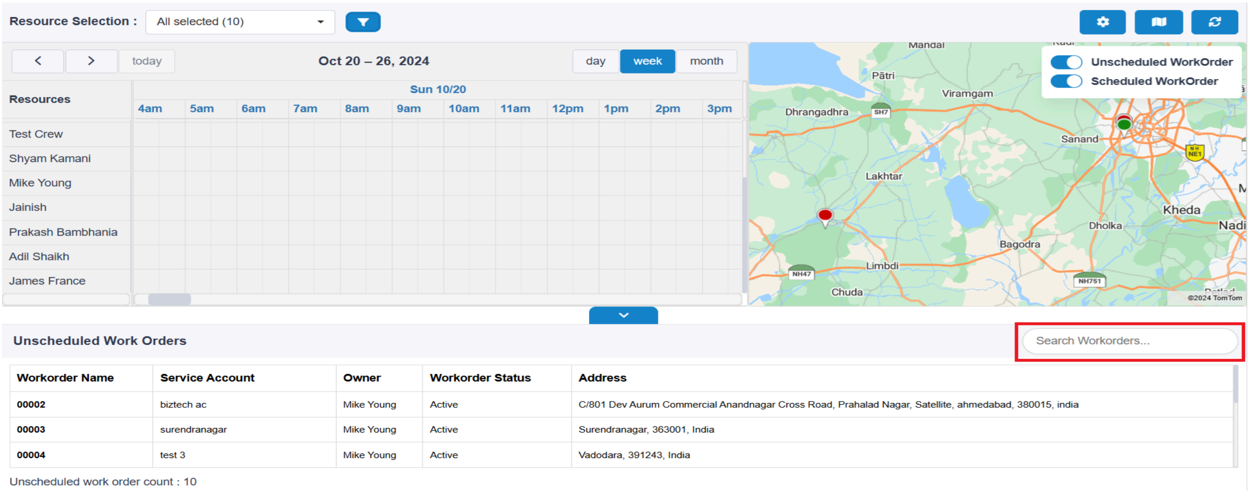
To reset the proximity search and refresh all displayed data, simply click the **Refresh Button**. This action will:

- Clear any applied proximity filters.
- Refresh all data shown in the grid, calendar, and map.

As a result, users will see the latest information for both scheduled and unscheduled work orders, ensuring that they have the most up-to-date view of their resources and tasks.

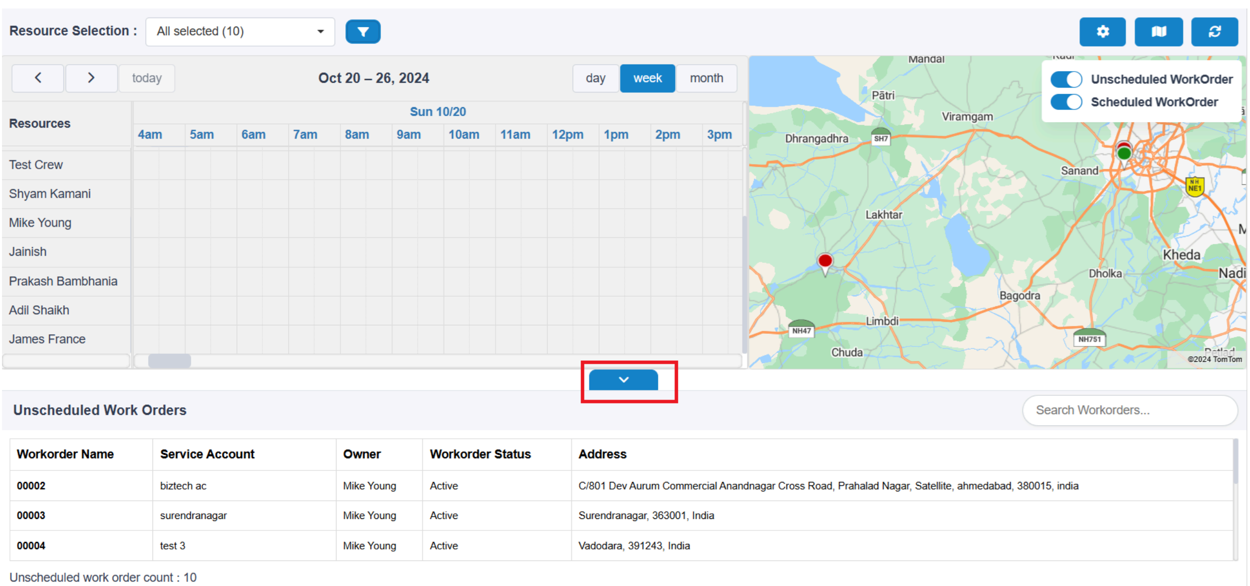


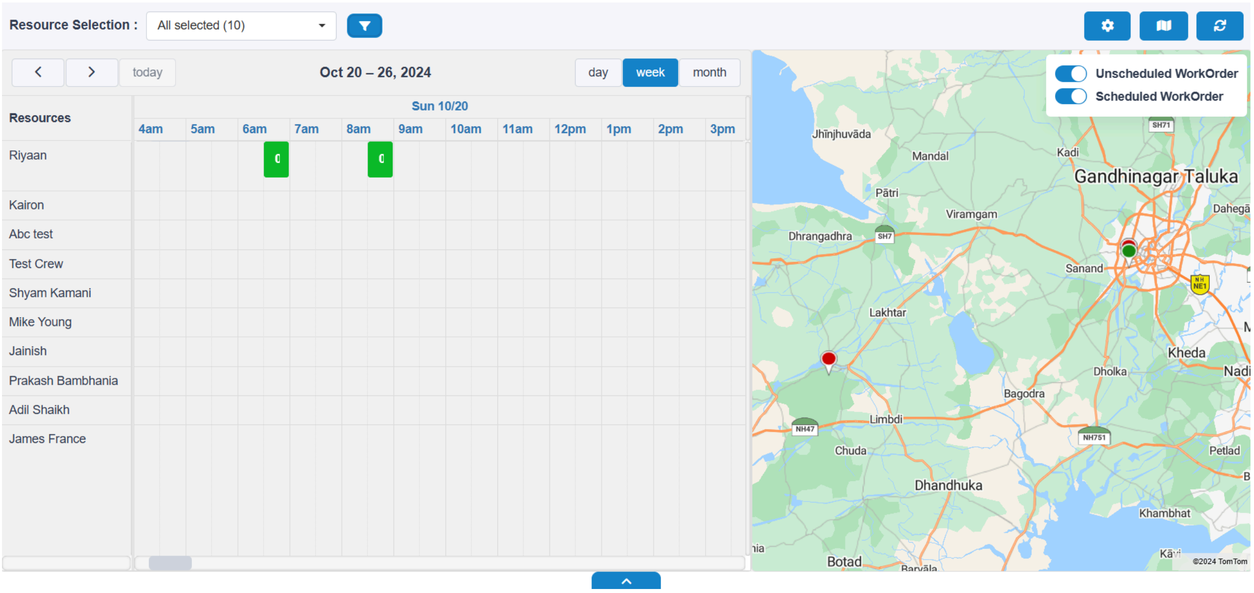
In the grid, users can view their **unscheduled work orders**. To filter specific records, users can utilize the **Search Work Order** feature. This functionality allows users to quickly find and filter unscheduled work orders by entering relevant keywords or criteria, making it easier to manage and prioritize tasks effectively.



Users can open the **Calendar** and **Map** in full-screen mode for a heightened perspective. This feature provides an immersive view, allowing users to better visualize their schedules and geographical data without any distractions from the surrounding interface.

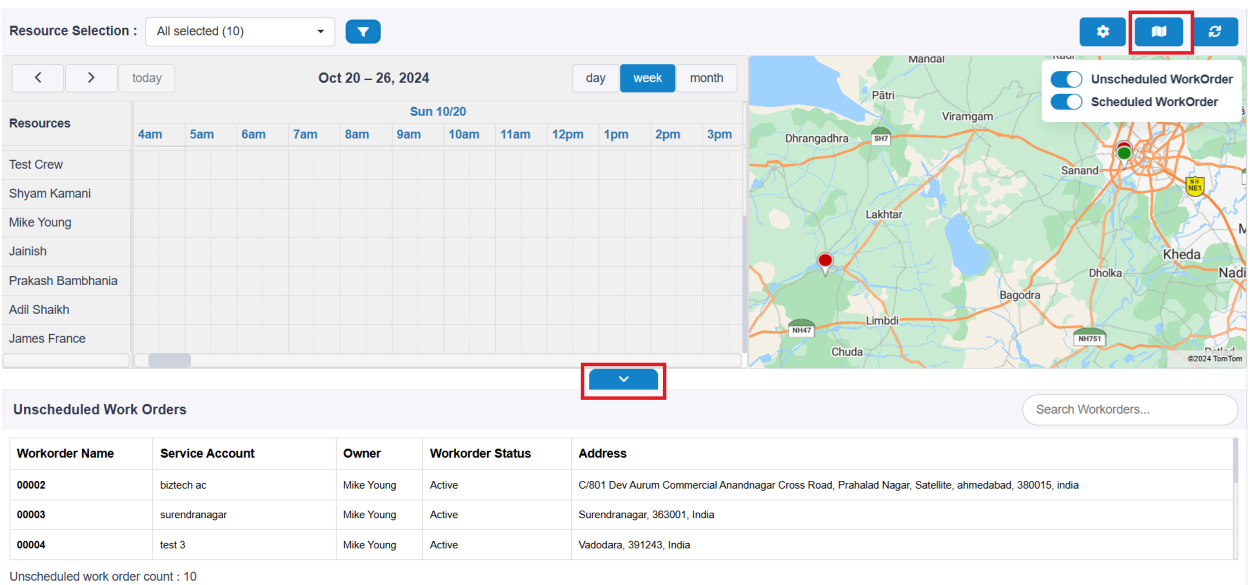
To enter full-screen mode, simply click the **grid hide/show Button** located on the calendar or map interface. This enhancement facilitates a more detailed and comprehensive analysis of scheduled work orders and resource allocations.

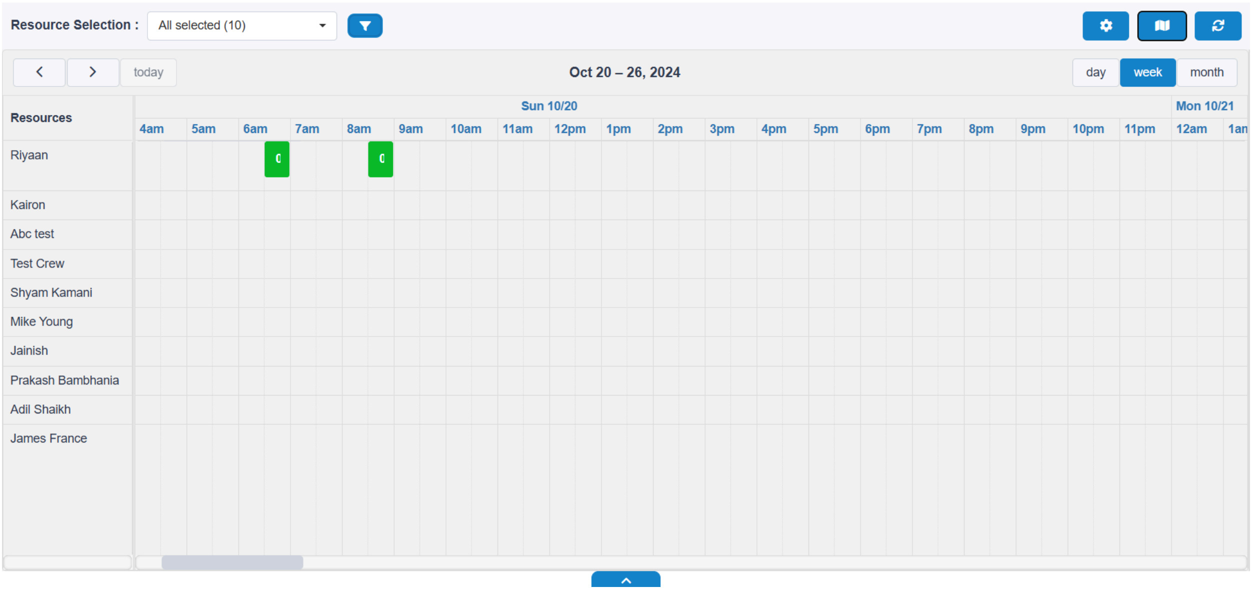




Users can also enable the **Calendar** in full-screen mode by hiding the grid. This can be done using the **Hide Grid Button**, allowing for a more focused view of the calendar.

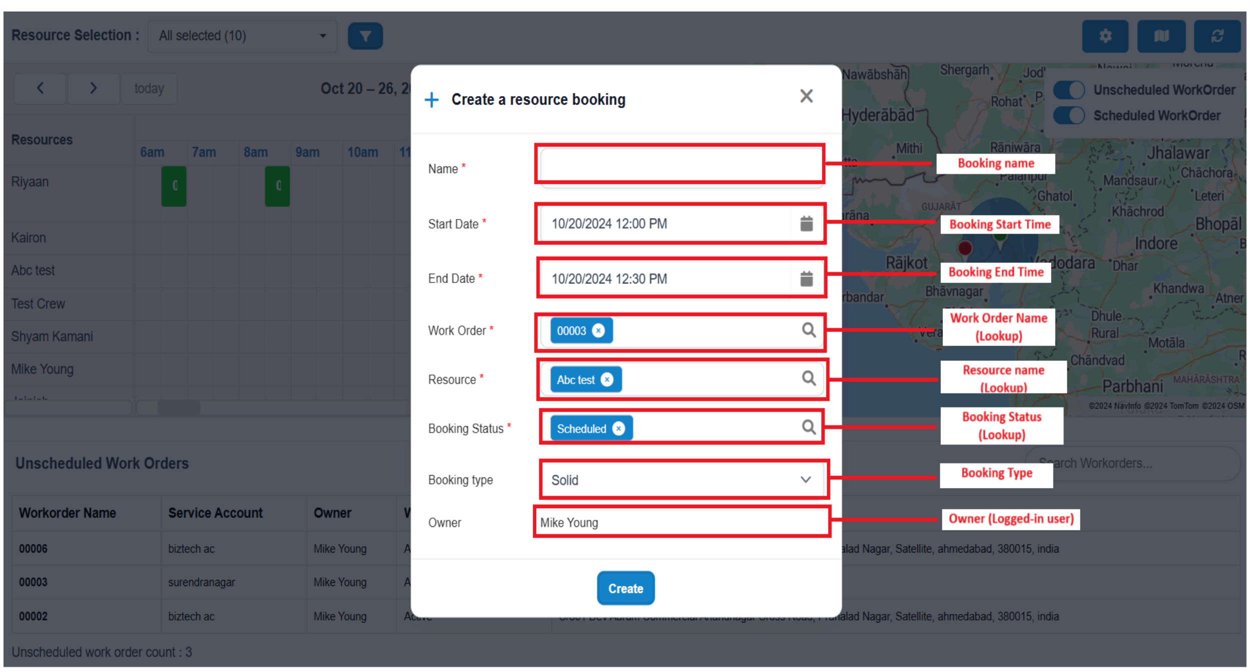
Additionally, users can hide the map by using the **Show/Hide Map Button**. This combination of options allows users to maximize their workspace, concentrating solely on the calendar while minimizing distractions from other elements of the interface.





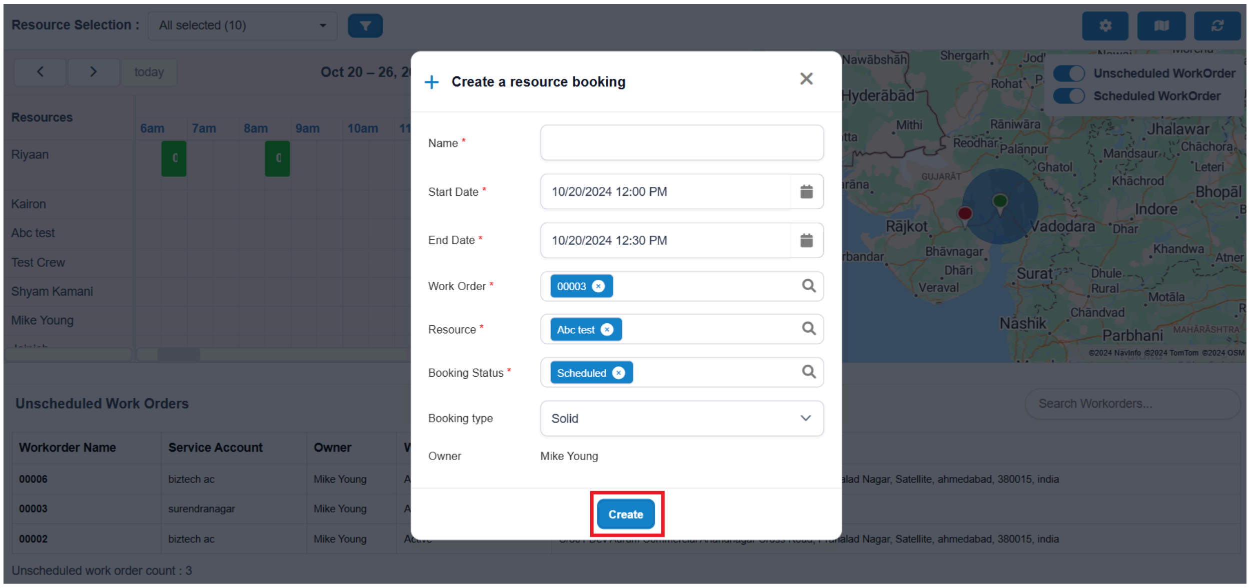
Users can create a booking according to resources using the **drag-and-drop feature**. This intuitive functionality allows users to drag a work order from the grid and drop it onto the calendar.

Upon dropping the work order, a popup will appear, pre-filled with relevant fields for the booking. Users can review these pre-filled fields and update them as needed, ensuring that all information is accurate before finalizing the booking. This streamlined process enables users to quickly and efficiently schedule work orders while minimizing the need for manual data entry, making it easier to manage and adjust bookings on the fly.



Users can modify all data according to their requirements and schedule, except for the **Owner** field, which remains fixed after filling out the form.

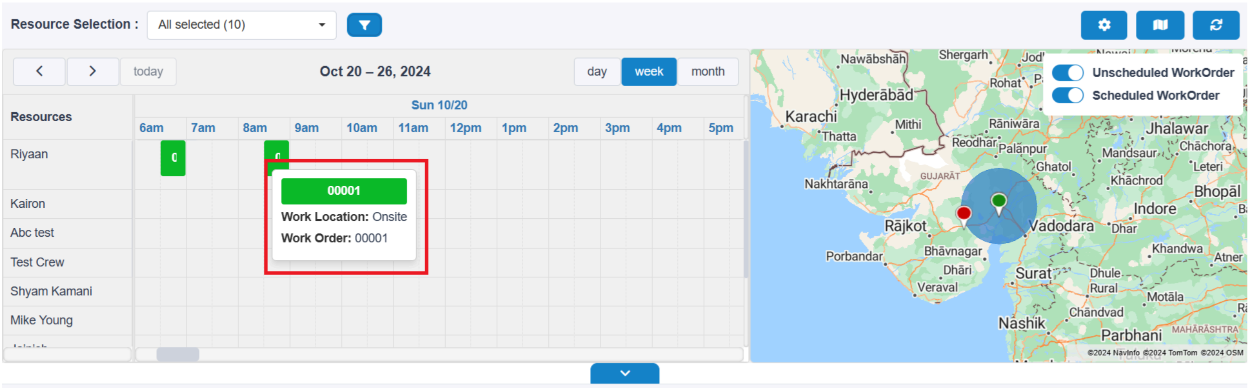
Once all other fields are reviewed and updated as necessary, users simply need to click the **Create Button** to finalize the work order booking. This ensures that while users have flexibility in scheduling and details, the ownership remains consistent for effective management.



After creating a booking, it will automatically reflect on the calendar and map as a scheduled work order. Users do not need to refresh the scheduled board; the updates will occur in real time. This seamless integration ensures that users have immediate visibility of their bookings, enhancing efficiency in managing work orders and resources.

After creating a booking, users can see their booking on the calendar. By hovering over the booking event, they can access detailed information about the scheduled work order. Similarly, on the map, users can hover the mouse over the pushpin to view the work order details.

Both sets of details are derived from the configuration settings, specifically from the fields that have been enabled for map and calendar hover functionality. This ensures that relevant data is visualized on both the calendar and map, providing users with quick access to essential information about their bookings.

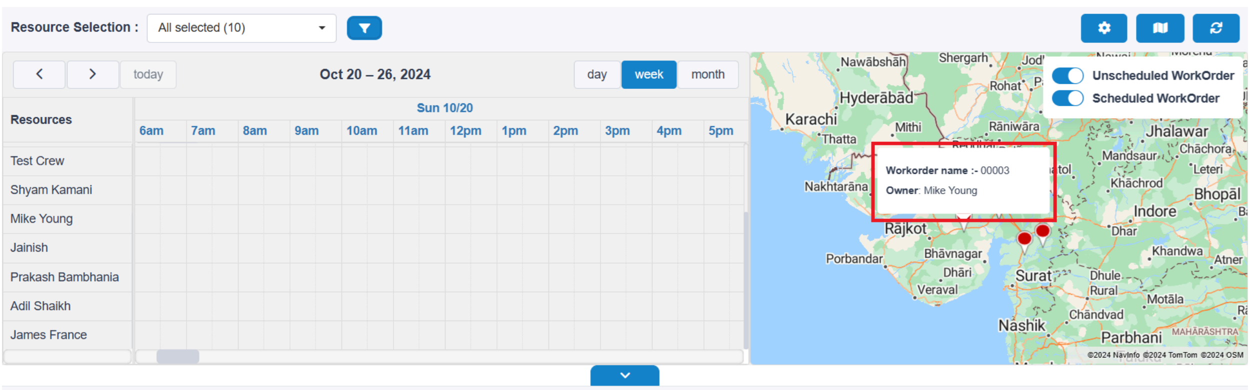


Unscheduled Work Orders

Search Workorders...

Workorder Name	Service Account	Owner	Workorder Status	Address
00006	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India
00002	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india

Unscheduled work order count : 3



Unscheduled Work Orders

Search Workorders...

Workorder Name	Service Account	Owner	Workorder Status	Address
00002	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India
00004	test 3	Mike Young	Active	Vadodara, 391243, India

Unscheduled work order count : 10

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- Visit our product page at: https://www.appjetty.com/dynamicscrm-all-in-one-calendar.htmand click on the Live Chat button for instant support.

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- Raise tickets for your specific question!
- Send an email to support@appjetty.com or you can login to my account www.appjetty.com and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

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