

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

TABLE OF CONTENTS

Introduction	4
Compatibility	4
Pre-requisites	4
Calendar Management	4
Calendar 365	4
Resource Calendar	5
Customer Calendar	7
Entity Calendar	8
Related Entities	11
Owner wise Colorized activity	12
Activity Details	13
Left side panel options	17
Upcoming Events	20
Refresh	20
Follow Up Appointment	21
Save and Share Calendar Views	25
View Saved Calendar list	26
Save Calendar View for Entity Calendar	28
Edit & Update Calendar	29
Share 'Saved Calendar' Views	30
Move Shared Calendar to Saved Calendar	31
Share Appointment Activity	32
Activity Grid View of Calendar	35
Set Regarding under Grid View	36
Calendar inside entity record	38
Calendar Activities	42
Create an Activity	42
Quick Create Activity (CRM Form)	48
All day event for Appointment	50
Create a Custom Activity	51
Location selection	53
Attachment for Activity	54
View & Manage Activity	55
View Note	60
Edit Activity	61
Copy Activity	62
Share Activity	63
Re-assigning Activity	65

View Activity	65
Delete Activity	66
Search Activity	67
Recurring Appointment	71
Share Activity	72
Overdue Activities	73
Conflict Management	74
Unscheduled Activities	74
Print Calendar	76
Activity Action	78
Mark as Complete	78
Mark as Cancel	78
Convert Activity to Opportunity	79
Convert Activity to Case	79
Convert Activity to Lead	80
End Series	80
Deactivate Bookable Resource Booking	82
Reminder of Activity:	82
Create Entity Records	84
Quick Create Activity (CRM Form)	89
Edit Record	90
Copy Record	90
View Record	91
Delete Records	91
Calendar Views	92
Time Slot Duration View	92
Top Down View	93
Day View	94
Day Span View	94
Week View	94
Gantt View	95
Day View	95
Day Span View	95
Week View	96
Month View	96
Timeline View	97
Day View	97
Day Span View	98
Week View	98
Month View	98
Agenda View	99
Two Way Sync - Outlook/Google Calendar	101
Appointment Booking	103
Check Booking Appointment	114
Group Events	118

Round Robin Events	123
Settings	126
Filter by option for entity calendar	128
Schedule unscheduled work order	130
Work order scheduler	136
Supported Devices	136
Resource Management	137
Contact Us	150

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)

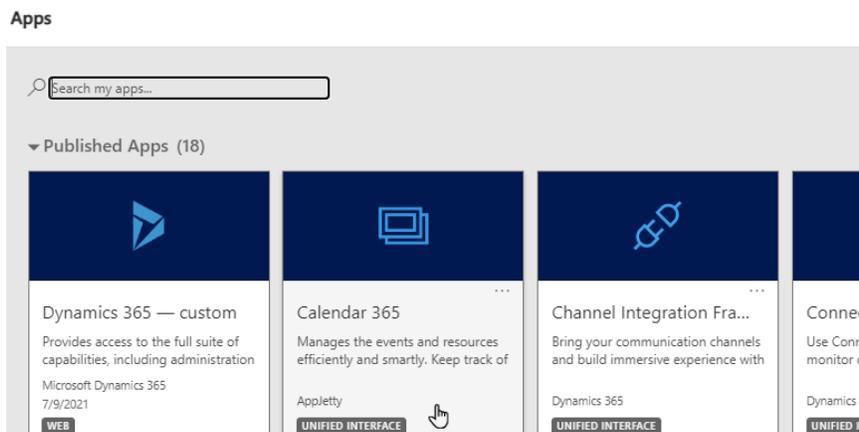
Pre-requisites

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

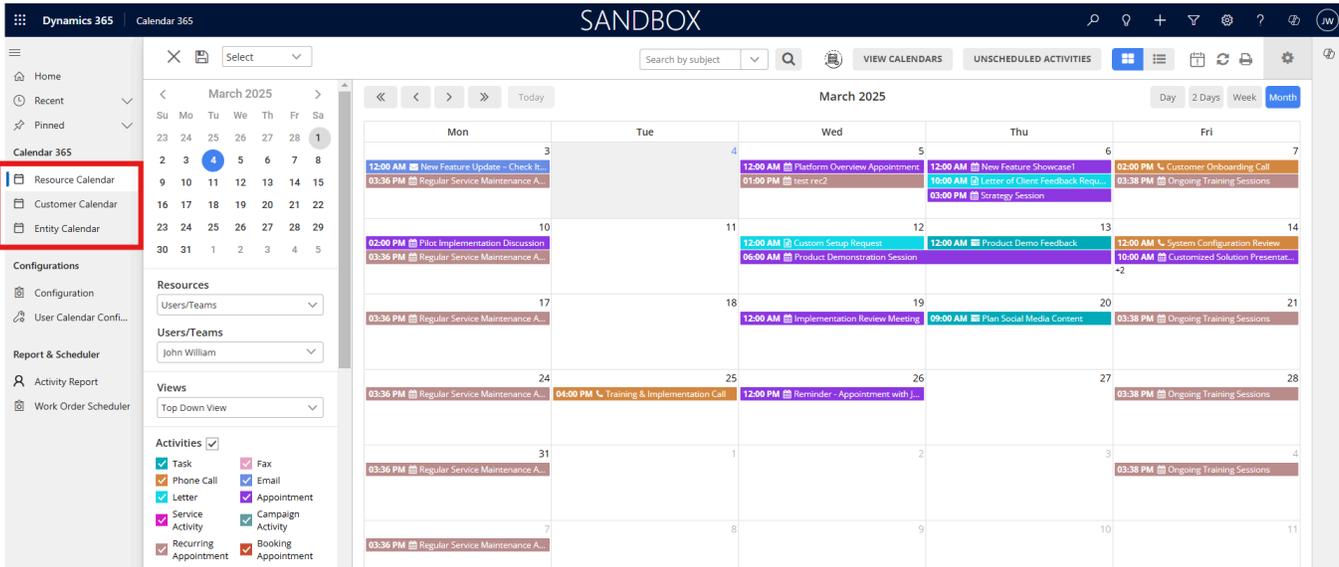
Calendar Management

Calendar 365

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



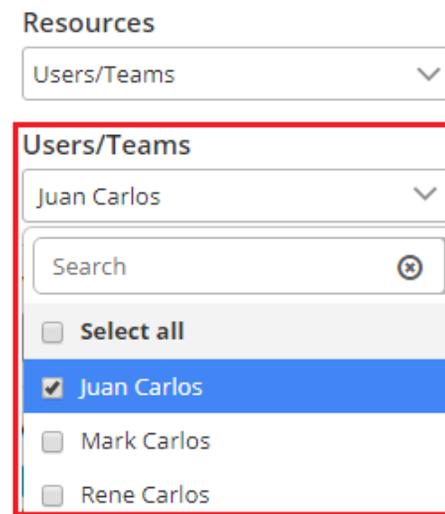
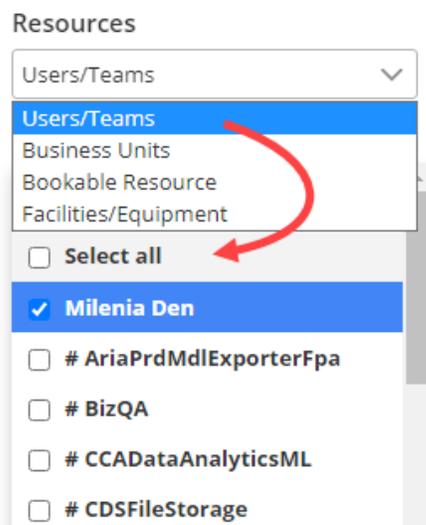
- Calendar page would load, and all the activities will be displayed in the calendar as per the **default configuration** made from the settings.
- Here, you will get three calendars: **Resource Calendar, Customer Calendar, and Entity Calendar**.



- 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.

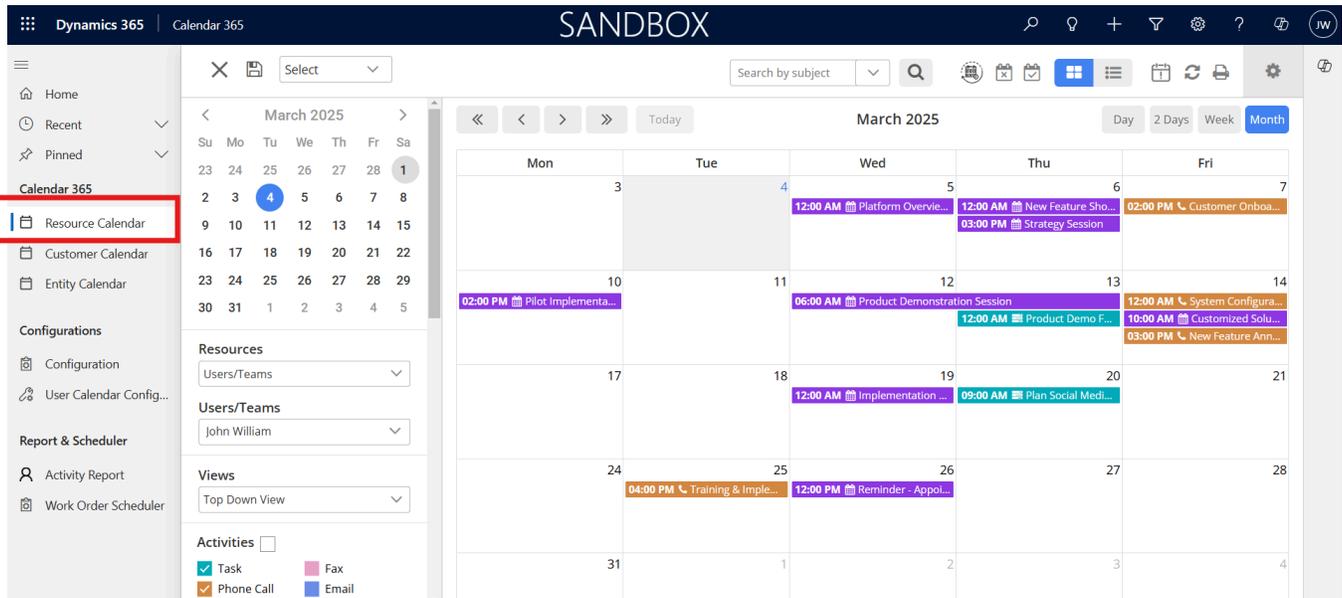


- o If **User/Teams** option is selected as resource, it displays list of users in multiple selection dropdown. User/Teams is a user and a member of your organization.

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

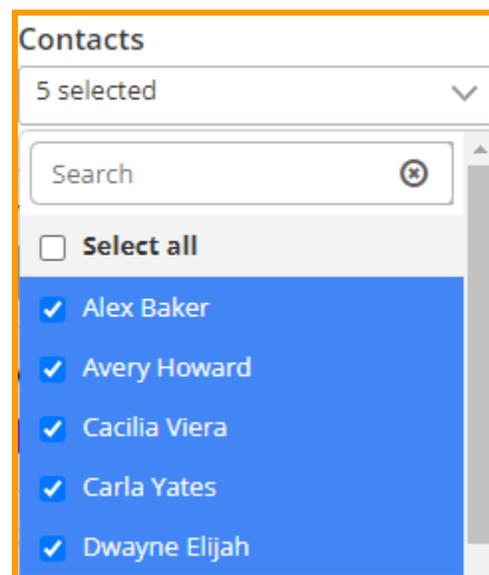
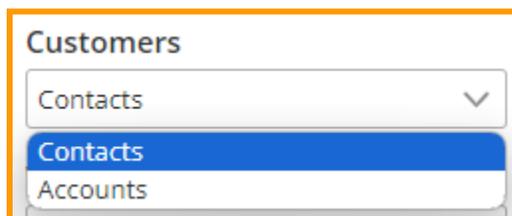
- o If **Business Unit** option is selected as “Resources”, it displays the business units of the organization like departments or divisions that have separate products, customers, and marketing lists.
- o If **Bookable Resource** option is selected as “Resources”, it displays list of Bookable Resources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

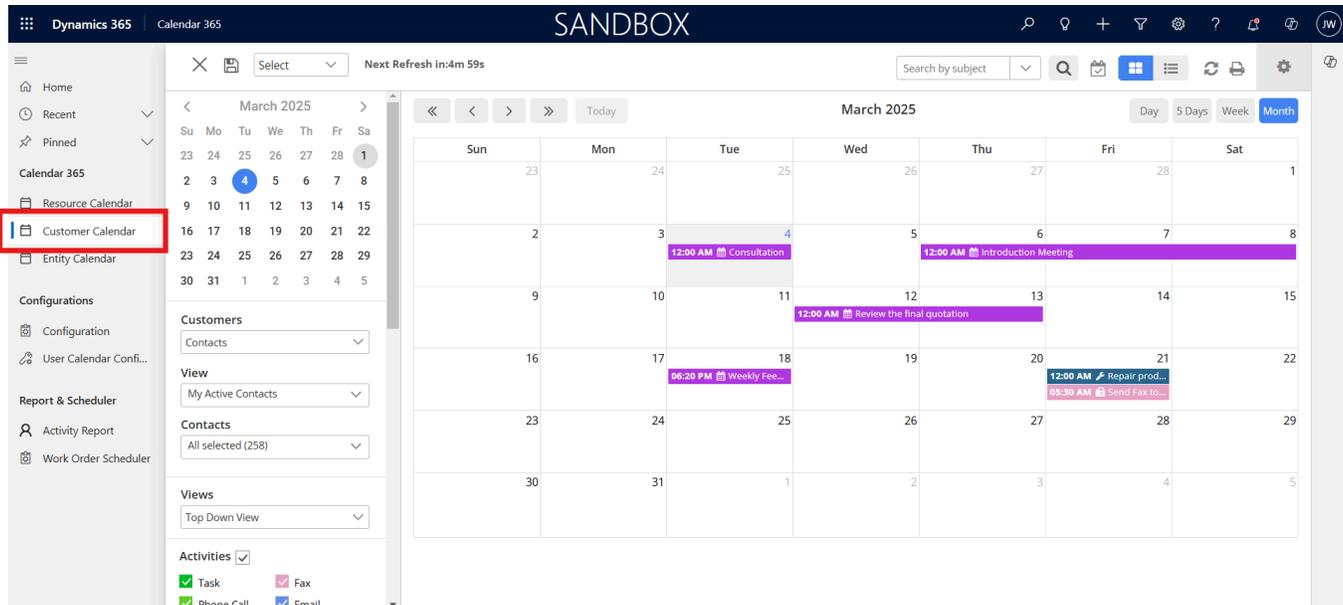
- You will get “Accounts” and “Contacts”.
 - o If **Contact** and **View** is selected as resource, it displays a list of the respective contacts in multiple selection dropdown. These will be available only when contact and view are selected from the dialog box.
 - o If **Account** and **View** is selected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

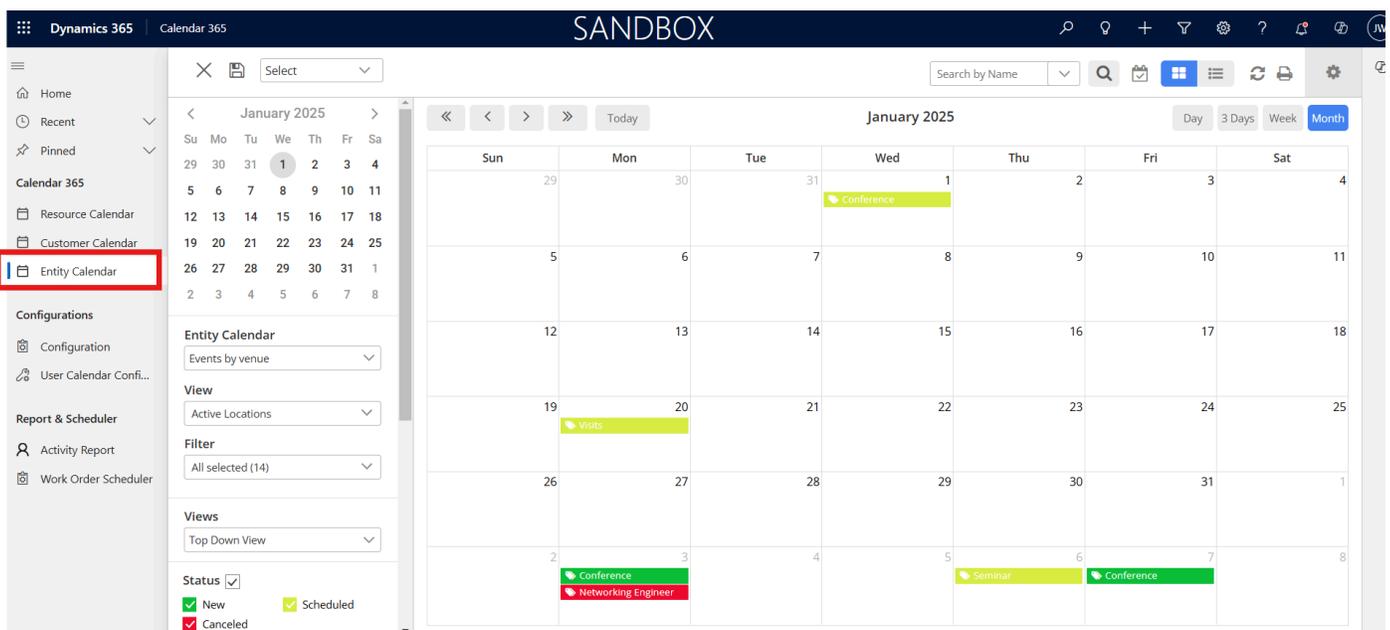
- You will get the records on the calendar based on the “Resource” and its records selection.



The screenshot shows the Dynamics 365 interface for 'Calendar 365' in a 'SANDBOX' environment. The left-hand navigation pane is open, and the 'Resource Calendar' option is highlighted with a red box. The main area displays a monthly calendar for March 2025. The calendar shows several activities: 'Consultation' on March 4th, 'Introduction Meeting' on March 6th, 'Review the final quotation' on March 12th, 'Weekly Fee' on March 18th, and 'Repair prod...' on March 21st. The interface includes search bars, navigation arrows, and view options (Day, 5 Days, Week, Month).

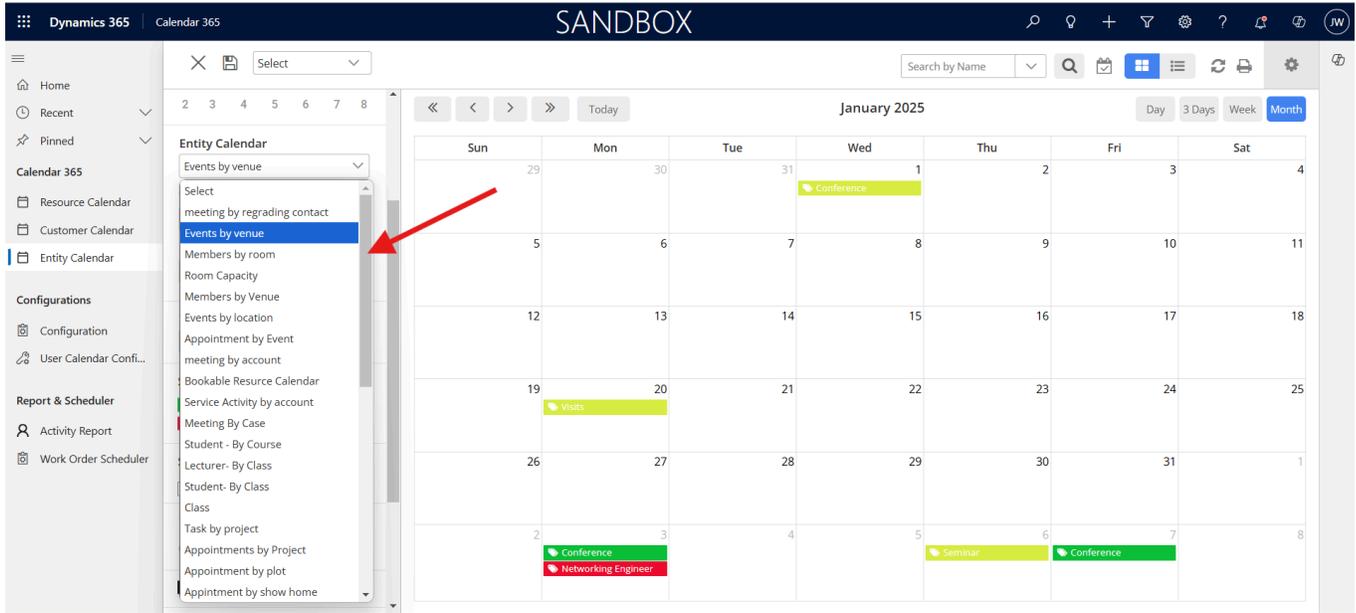
Entity Calendar

- 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.

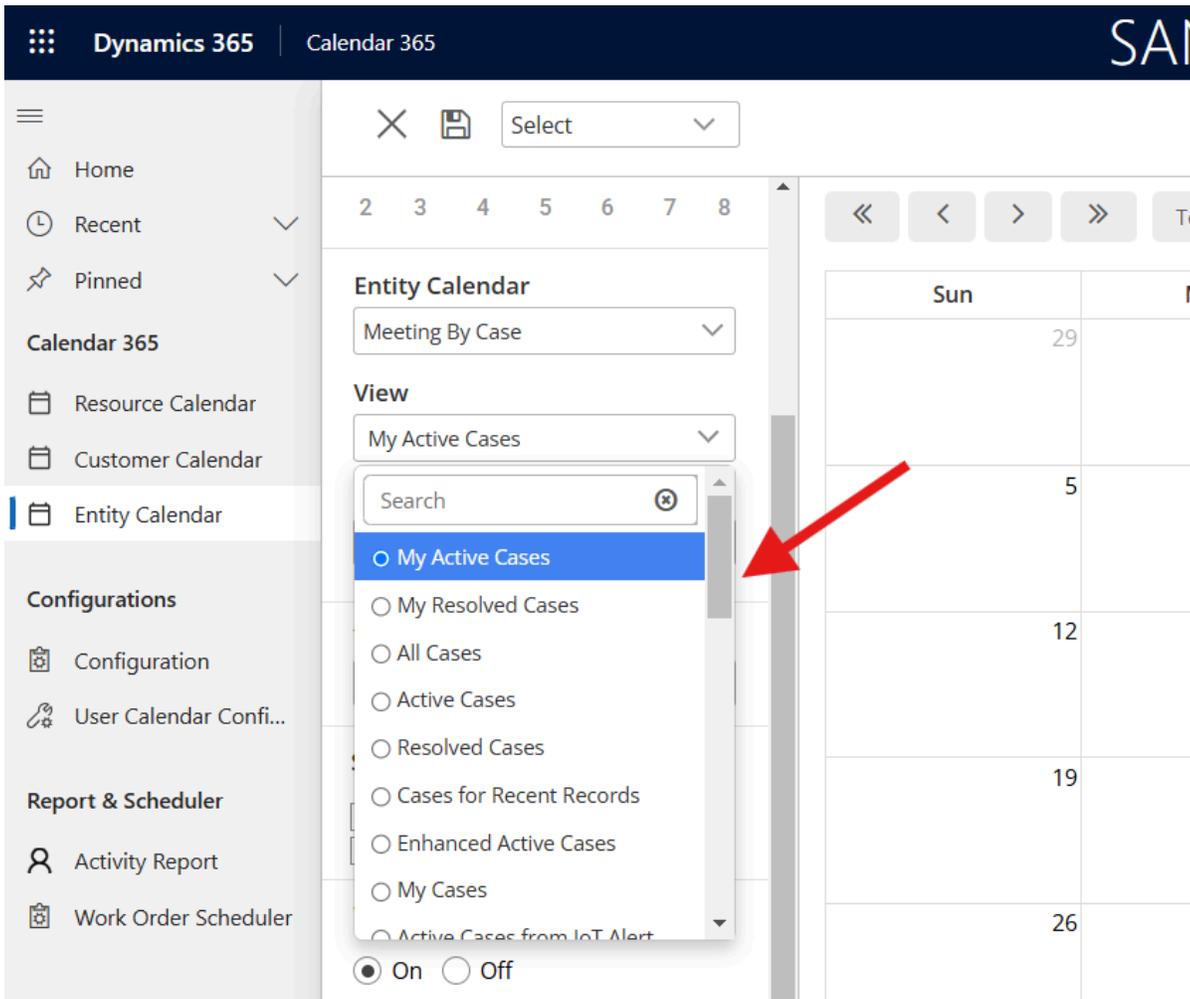


The screenshot shows the Dynamics 365 interface for 'Calendar 365' in a 'SANDBOX' environment. The left-hand navigation pane is open, and the 'Entity Calendar' option is highlighted with a red box. The main area displays a monthly calendar for January 2025. The calendar shows several activities: 'Conference' on January 31st, 'Visits' on January 20th, and 'Networking Engineer' on January 3rd. The interface includes search bars, navigation arrows, and view options (Day, 3 Days, Week, Month).

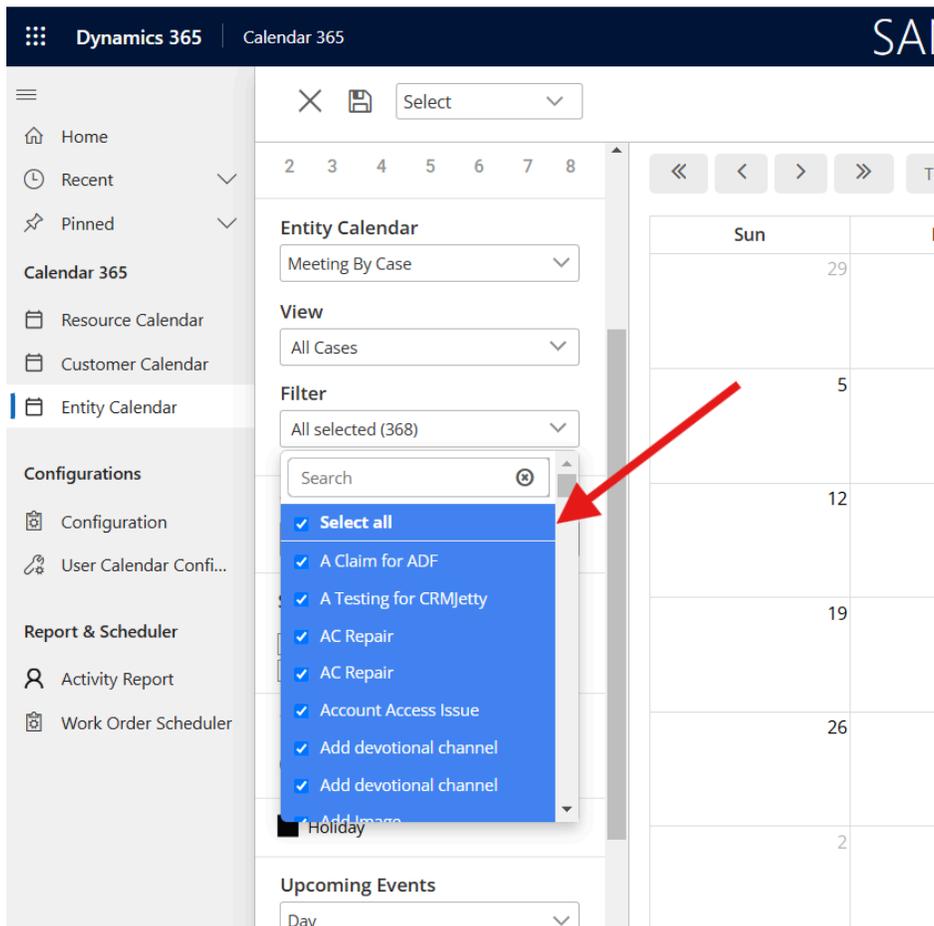
- From the left navigation, by clicking on the “Entity Calendar” dropdown, you will get the list of Entities that you have configured.



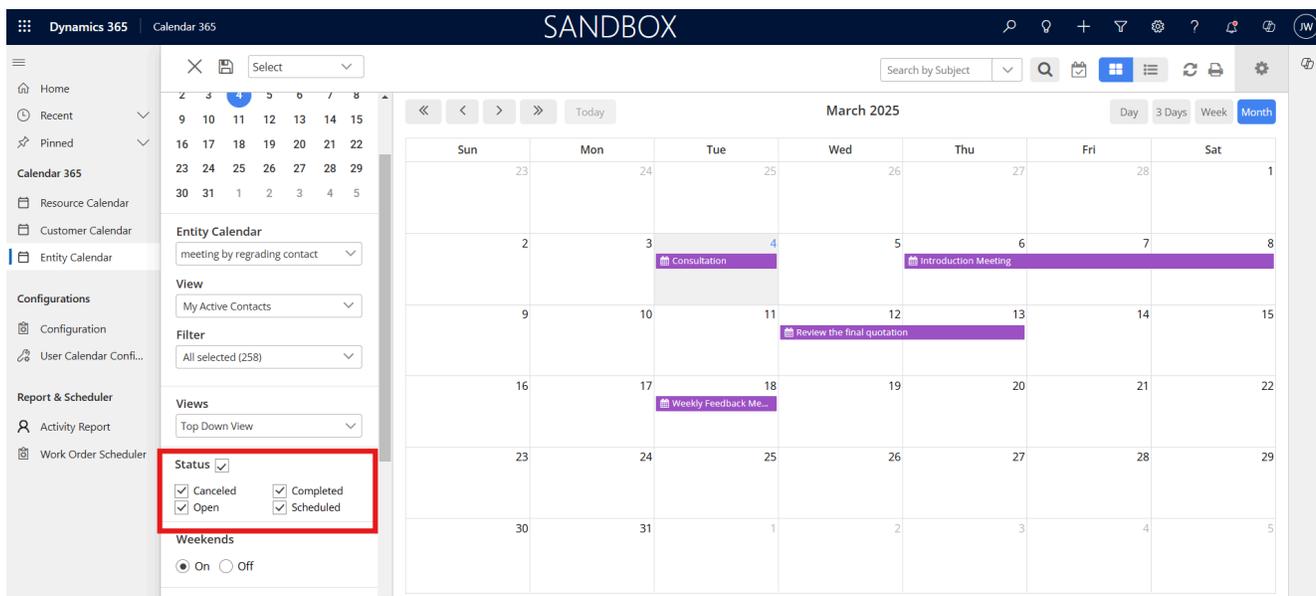
- Once you select the entity, the “View” will be displayed as per the entity that has been selected. Select the “View” accordingly.



- 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.



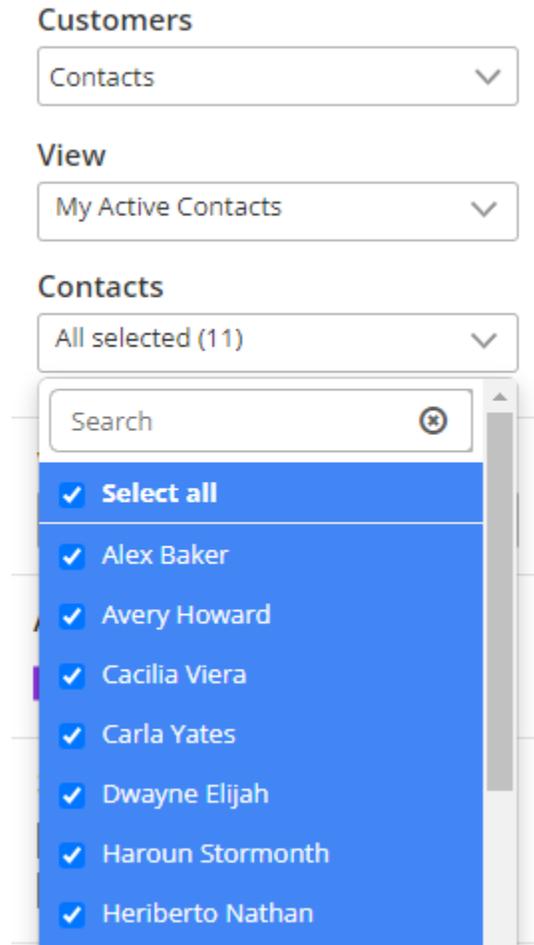
- You can also filter the data on the calendar by selecting its status i.e. **Canceled, Open, Completed** and **Scheduled**.



- 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.



Customers

Contacts

View

My Active Contacts

Contacts

All selected (11)

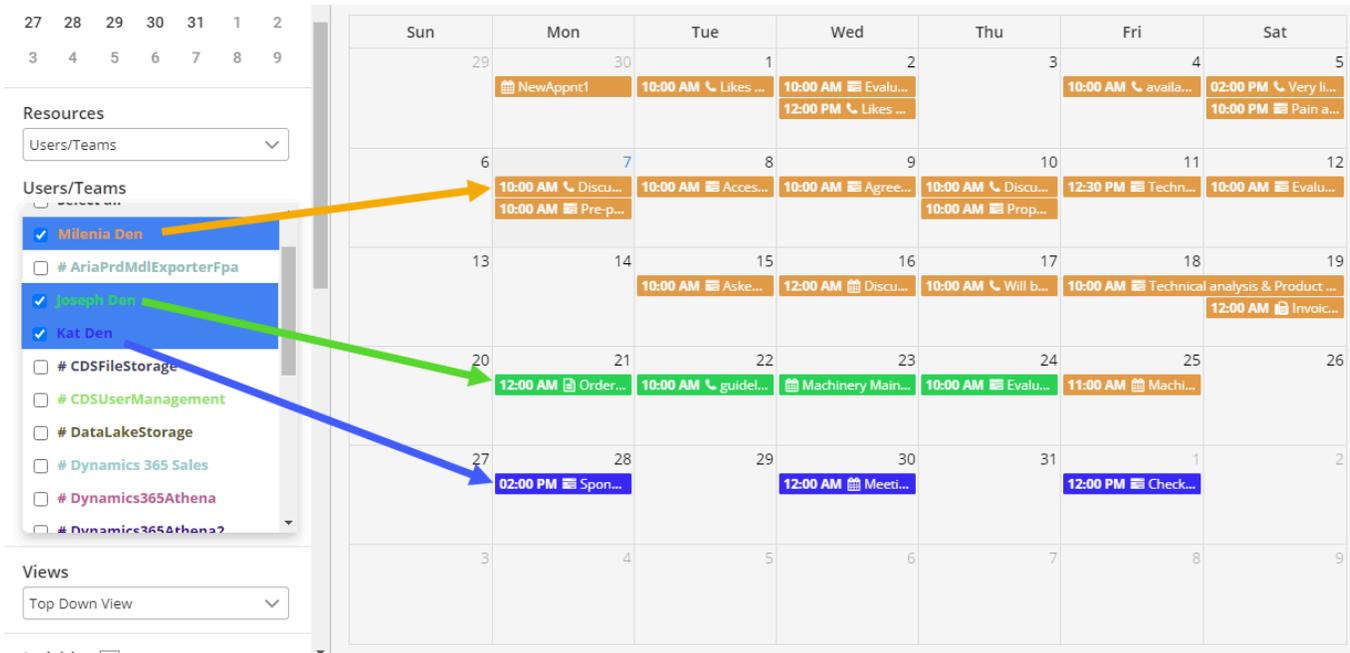
Search

- Select all
- Alex Baker
- Avery Howard
- Cacilia Viera
- Carla Yates
- Dwayne Elijah
- Haroun Stormonth
- Heriberto Nathan

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**.

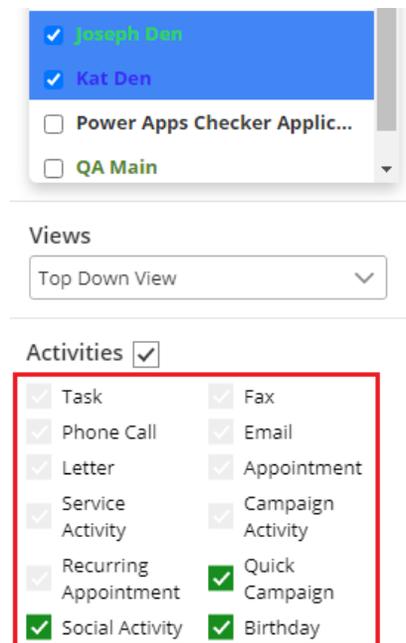


The screenshot displays a calendar interface with a sidebar on the left. The sidebar includes a 'Resources' dropdown set to 'Users/Teams', a 'Users/Teams' list with three users selected: Milenia Den (orange), Joseph Den (green), and Kat Den (blue), and a 'Views' dropdown set to 'Top Down View'. The calendar grid shows activities for various days, color-coded by owner. Arrows point from the 'Users/Teams' list to specific activities on the calendar: an orange arrow points to an orange activity on Monday, a green arrow points to a green activity on Monday, and a blue arrow points to a blue activity on Monday.

- 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.



The screenshot shows a 'Users/Teams' list with 'Joseph Den' and 'Kat Den' selected. Below it is a 'Views' dropdown set to 'Top Down View'. At the bottom, there is an 'Activities' list with a checked checkbox. The activities listed are: Task, Phone Call, Letter, Service Activity, Recurring Appointment, Social Activity, Fax, Email, Appointment, Campaign Activity, Quick Campaign, and Birthday. The 'Quick Campaign' and 'Birthday' items are highlighted with a green checkmark.

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**.

Layout Customization

Hover Settings

5 selected

Start Date

Start Date

Title Settings

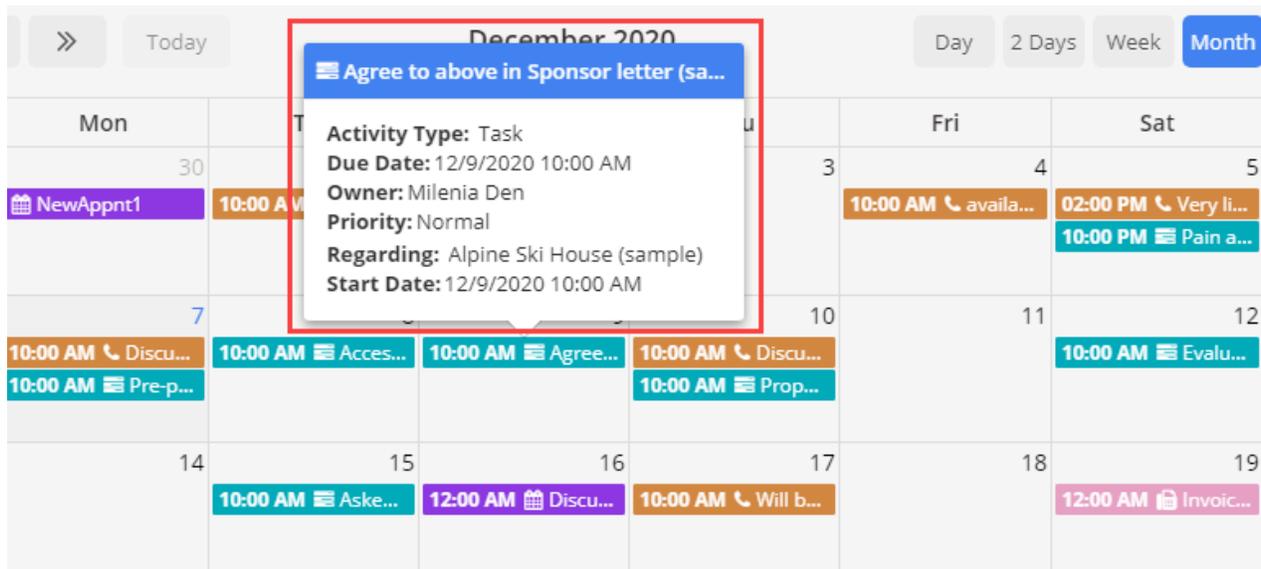
Subject

Pop-up Settings

5 selected

Tooltip on Calendar

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



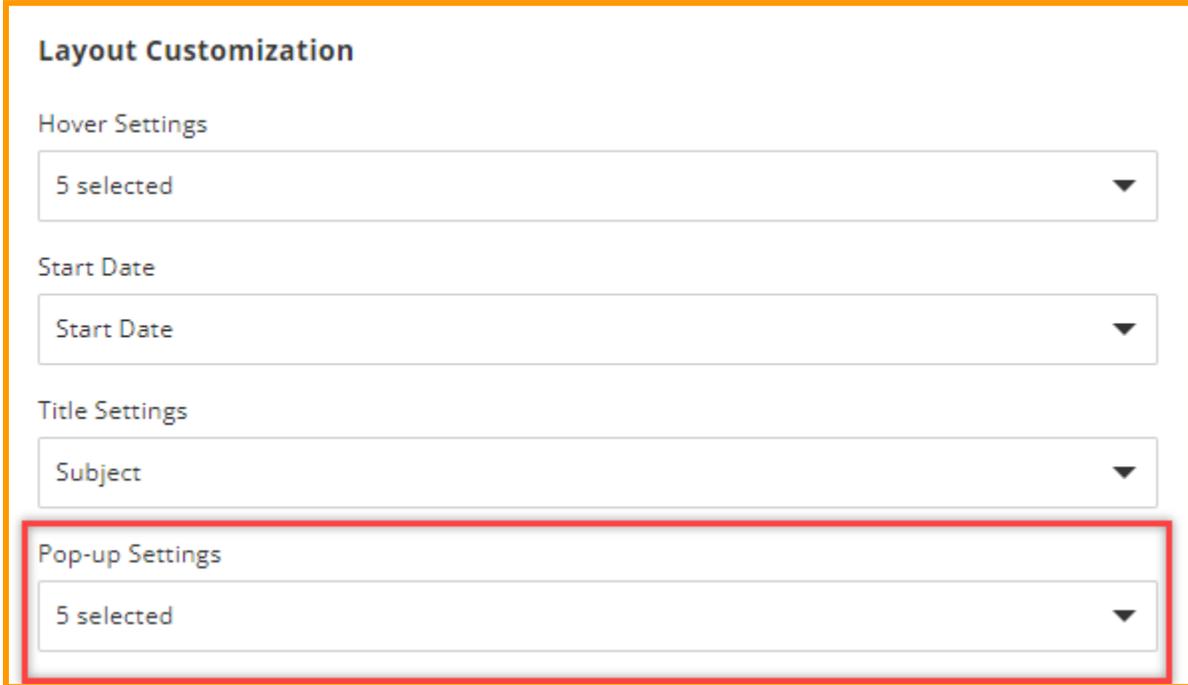
The screenshot shows a calendar for December 2020. A tooltip is displayed over an activity on December 9th. The tooltip contains the following information:

- Activity Type:** Task
- Due Date:** 12/9/2020 10:00 AM
- Owner:** Milenia Den
- Priority:** Normal
- Regarding:** Alpine Ski House (sample)
- Start Date:** 12/9/2020 10:00 AM

The calendar interface includes navigation buttons for 'Today', 'Day', '2 Days', 'Week', and 'Month'. The activity being hovered is titled 'Agree to above in Sponsor letter (sa...)'.

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**.



Layout Customization

Hover Settings

5 selected

Start Date

Start Date

Title Settings

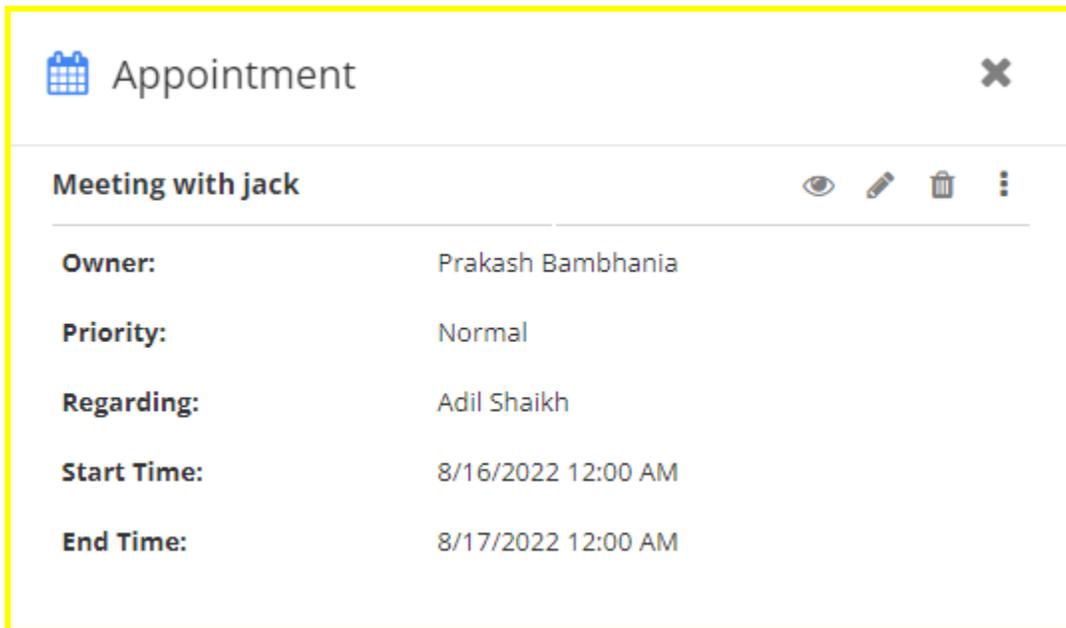
Subject

Pop-up Settings

5 selected

Activity Detail view on Calendar

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



 Appointment ✕

Meeting with jack    

Owner: Prakash Bambhania

Priority: Normal

Regarding: Adil Shaikh

Start Time: 8/16/2022 12:00 AM

End Time: 8/17/2022 12:00 AM

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**.

Appointment



Meeting with jack



Owner: Prakash Bambhania
Priority: Normal
Regarding: Adil Shaikh
Start Time: 8/16/2022 12:00
End Time: 8/17/2022 12:00

- Follow Up Meeting
- Add/View Note
- Copy
- Share
- Reassign
- Mark as complete

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.

Navigation: << < > >> Today **October 2021** Day 2 Days We

Sun	Mon	Tue	Wed	Thu	Fri
26	27	28	29	30	1
Provide product overview					
			QA Ac...	05:25 PM Provide required information about devic	
			+1	+1	+1
3			6	7	8
Provide product overview					
Product demo & discussion					
Provide required information e					
10			13	14	15
Product demo & discussion					
	04:30 PM Appoi...	12:00 AM John a...	04:54 PM Provide required information		
17	18	19	20	21	22
Product demo & ...					

John appointment
Activity Type: Appointment
Owner: Prakash Bambhania
Priority: Normal
Regarding: -
Start Time: 10/12/2021 12:00 AM
End Time: 10/13/2021 12:00 AM

- 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"

 Appointment ✕

Demo Appointment    

Owner: Prakash Bambhania

Priority: Normal

Regarding: -

Start Time: 8/17/2022 12:00 AM

End Time: 8/18/2022 12:00 AM

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

←
✉
Save
✓ Mark Complete
🔄 Refresh
🔍 Check Access
📄 Process
⋮

QA appointment - Saved

Appointment · Appointment

Normal | **Scheduled** | **Josh Ginni**

Priority | Status | Owner

Appointment Related

Required	 A. Datum Corporation
Optional	---
Subject	* QA appointment
Location	---
Regarding	---

Attachments

⋮

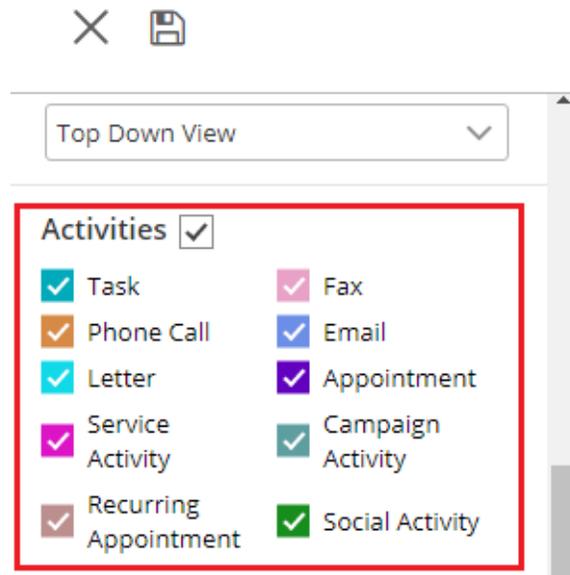


Note: “Activity View Redirection” setting is also provided at the user level (User Calendar Configuration). So, the users who have Appjetty Calendar 365/System Administrator rights will be listed in the User Calendar Configuration. You can configure the Activity View Redirection at the user level.

Left side panel options

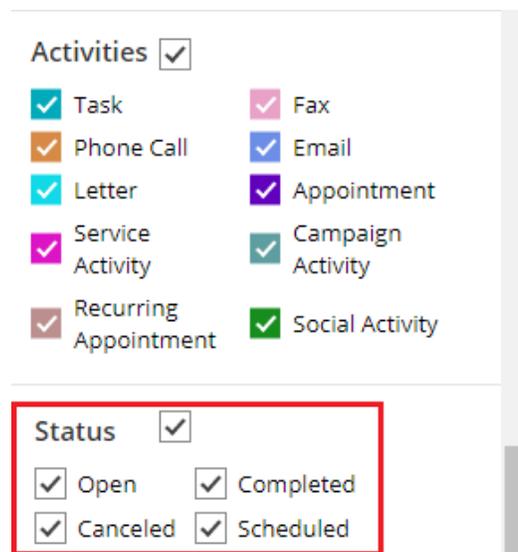
Activities

- 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.

Priority

High

Normal

Low



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.

Weekends

On Off

Holidays

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

Weekends

On Off

Holiday Official Ho...

Select

Government Holidays

Official Holidays

Upcoming Events

Day

- 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.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29 10:00 AM Pre-propo...	30	31 Halloween 02:00 PM Sponsor ha...	1 02:50 PM Review Lead	2
3 Daylight Saving Time ...	4 10:00 AM Discuss ne...	5	6 10:00 AM Discuss ne...	7	8 10:00 AM Evaluation ... 02:50 PM Review Lead	9
10	11 Veterans Day	12 10:00 AM Evaluation ... 12:00 PM Likes some ...	13 10:00 AM Mailed an i... 12:00 PM Verbal app...	14 10:00 AM availability ...	15 10:00 AM Evaluation ... 02:00 PM Very likely ... +2 more	16 10:00 AM Discuss hig...
17 10:00 AM Sponsor ag...	18 10:00 AM Access to ...	19 10:00 AM Agree to a... 10:00 AM Will be ord...	20 10:00 AM Proposal Is...	21	22 02:50 PM Review Lead	23
24	25 12:00 AM Appointme...	26	27 12:00 AM Juan's Birt...	28 Thanksgiving Day 10:00 AM Asked for ...	29 Black Friday 10:00 AM Evaluation ... 02:50 PM Review Lead	30
1	2 10:00 AM Likes our n...	3 12:00 PM Check sale...	4 10:00 AM guidelines f...	5	6 02:50 PM Review Lead	7

- 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.

Upcoming Events

Day

Type ▲ Event ▼

Appointment Technical Disc...

1

Note: Today's Events

Upcoming Events

Week

Type ▲ Event ▼

Appointment	Technical Disc...
Appointment	Technical Guid...
Fax	Fax-John
Fax	FAXX
Task	Task

1

Note: 7 days from Today

Upcoming Events

Month

Type ▲ Event ▼

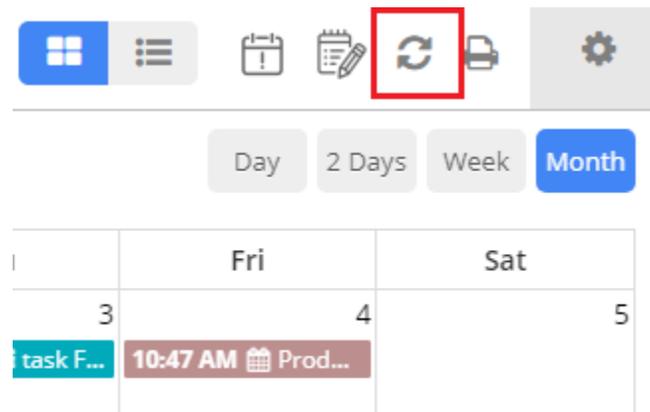
Appointment	Technical Disc...
Appointment	Technical Guid...
Fax	Fax-John
Fax	FAXX
Task	Task

1 2 Next

Note: 30 days from Today

Refresh

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

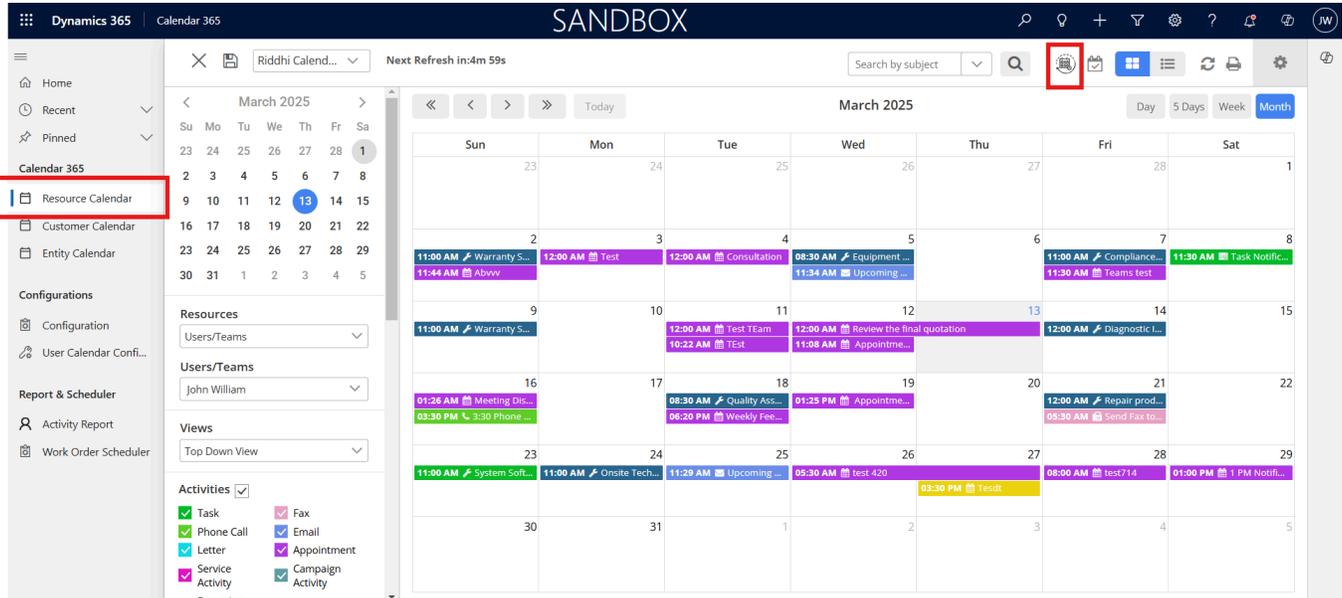


The screenshot shows a toolbar with icons for window, list, calendar, task, refresh (highlighted), and settings. Below the toolbar are view filters: Day, 2 Days, Week, and Month (selected). The calendar grid shows dates 3, 4, and 5. An event is shown on Friday (date 3) at 10:47 AM, labeled 'task F...' and 'Prod...'.

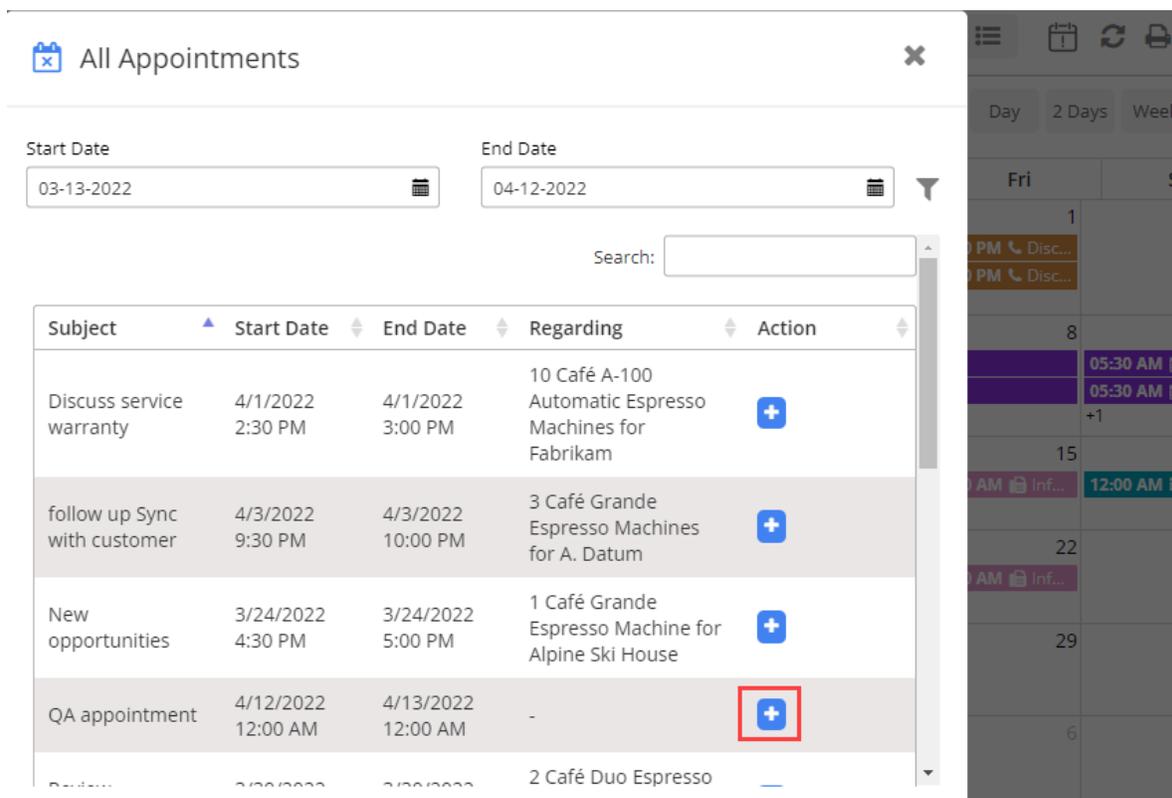
Note: After changes in configuration, you must **Refresh** to view the applied changes.

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.

+ Create Follow-up
×

Activity ▼

Appointment

Subject *

QA Follow up

Regarding

🔍

Start Date *

📅

End Date *

📅

All Day Event

Required

🔍

Optional

🔍

Location

CREATE

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

Search by subject ▼

🔍

📅

📁

🗄️

🔄

🖨️

⚙️

<<
<
>
>>

Today

April 2022

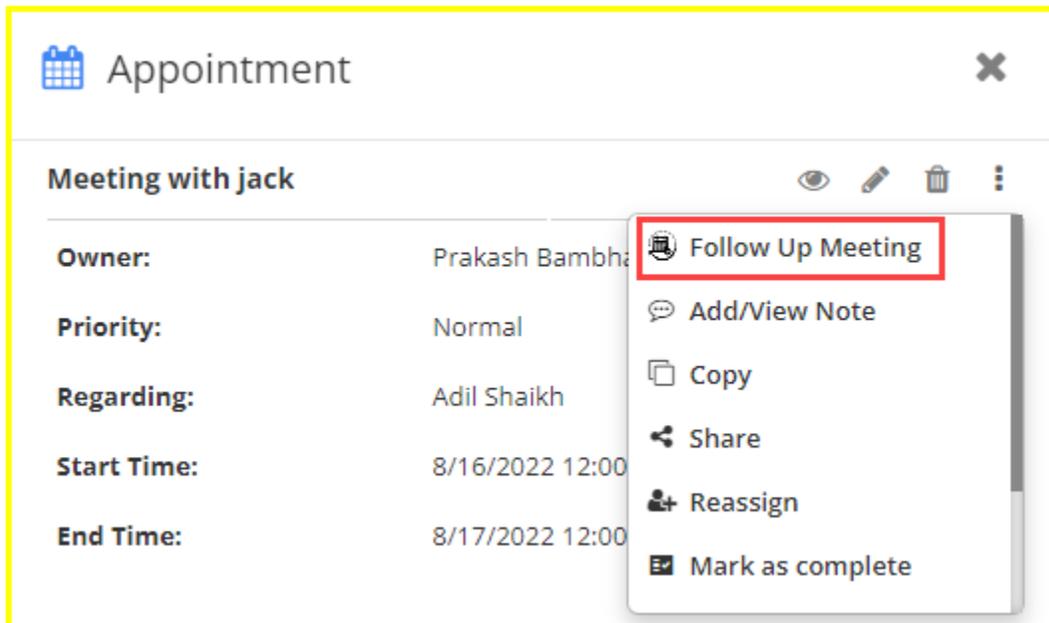
Day
2 Days
Week
Month

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
03:30 PM 📅 Dis...		04:30 PM 📅 Rev... 04:30 PM 📅 Rev...	03:30 PM 📅 Rev...		02:30 PM 📅 Disc... 02:30 PM 📅 Disc...	
3	4	5	6	7	8	9
09:30 PM 📅 foll... 09:30 PM 📅 Syn...	03:30 PM 📅 Rev... 03:30 PM 📅 Rev...	12:00 AM 📅 Test 12:00 AM 📅 dis...		05:30 AM 📅 dfg test 05:30 AM 📅 dfg test ..		05:30 AM 📅 dfg ... 05:30 AM 📅 dfg ...
10	11	12	13	14	15	16
📅 dfg test aaa 📅 dfg test aaa-te...		12:00 AM 📅 Test 12:00 AM 📅 Tes...	12:00 AM 📅 De...	12:00 AM 📅 Ou...	12:00 AM 📅 Inf...	12:00 AM 📅 Inf...
17	18	19	20	21	22	23
12:00 AM 📅 Ou... 12:00 AM 📅 Ou...	12:00 AM 📅 Inf... 12:00 AM 📅 Inf...		05:30 AM 📅 QA appointment 05:30 AM 📅 QA appointment-followup		12:00 AM 📅 Inf...	05:30 AM 📅 QA ... 05:30 AM 📅 QA ...
24	25	26	27	28	29	30
		12:00 AM 📅 Ou...				
1	2	3	4	5	6	7

- 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.

+ Create Follow-up
×

Activity ▼

Appointment

Subject *

discuss follow up meeting 2

Regarding

Start Date *

04/05/2022 12:00 AM 📅

End Date *

04/05/2022 12:00 AM 📅

All Day Event

Required

Josh Ginni 🔍

Optional

Location

CREATE

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

<<
<
>
>>

Today

April 2022

Sun					Thu
27				30	31
03:30 PM 📅 Disc...				Revi...	
3				6	7
09:30 PM 📅 follo...	03:30 PM 📅 Revi...	12:00 AM 📅 disc...		05:30 AM 📅 dfg tes	05:30 AM 📅 dfg tes
	+5			+7	
10	11	12	13	14	
📅 dfg test aaa					
📅 dfg test aaa-te...					
17	18	19	20	21	

📅 discuss follow up meeting 2

Activity Type: Appointment

Owner: Josh Ginni

Priority: Normal

Regarding: -

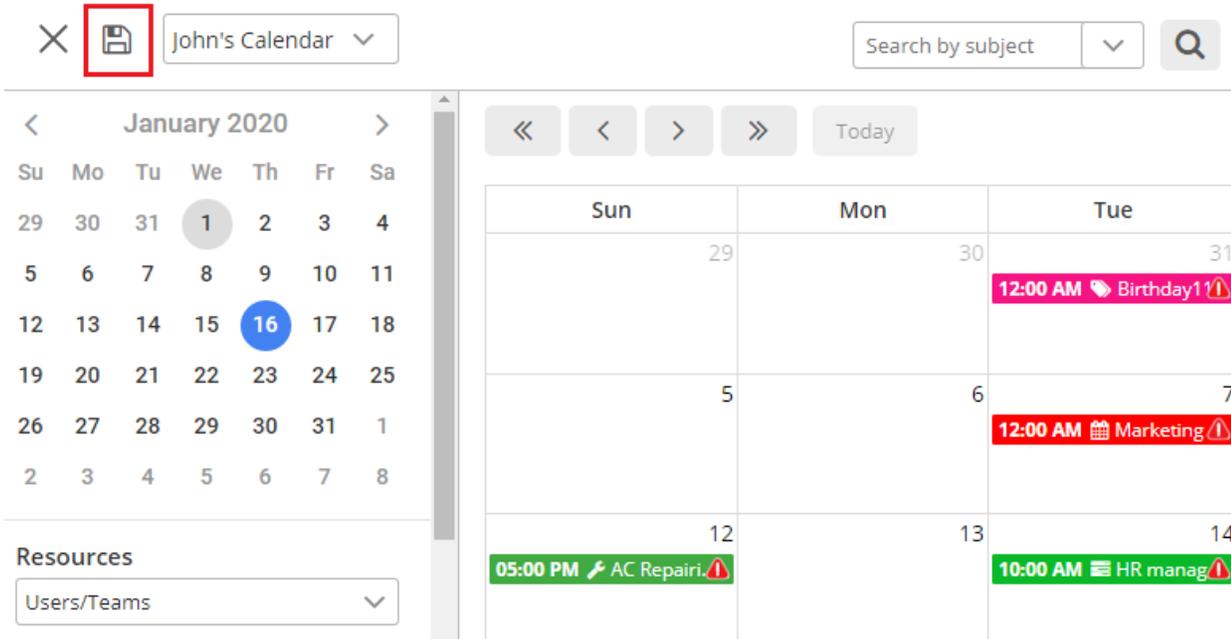
Start Time: 4/5/2022 12:00 AM

End Time: 4/5/2022 12:00 AM

←

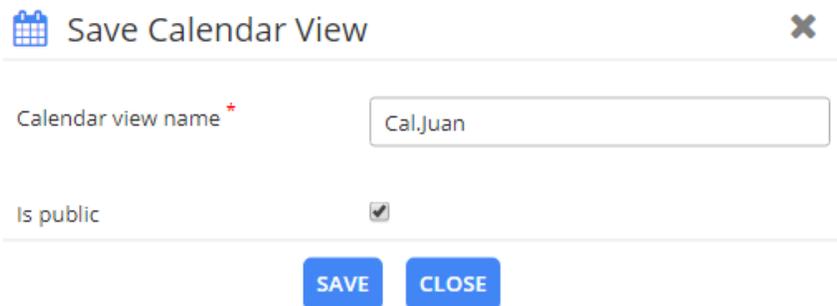
Save and Share Calendar Views

- 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.



The screenshot shows the Appjetty calendar interface. At the top left, there is a close button (X) and a 'Save' icon (floppy disk) highlighted with a red box. Next to it is a dropdown menu labeled 'John's Calendar'. To the right is a search bar with the text 'Search by subject' and a search icon (magnifying glass). Below the header, there is a calendar view for January 2020. The left side shows a monthly calendar grid with the date '16' highlighted in a blue circle. The right side shows a detailed view of the calendar for the week of January 12-14, 2020. The events listed are: '12:00 AM Birthday1' (pink), '12:00 AM Marketing' (red), '05:00 PM AC Repair' (green), and '10:00 AM HR manag' (green). Below the calendar, there is a 'Resources' section with a dropdown menu labeled 'Users/Teams'.

- 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.

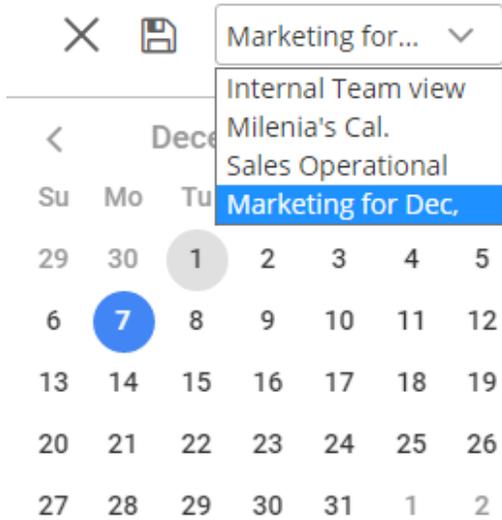


The screenshot shows the 'Save Calendar View' dialog box. It has a title bar with a calendar icon and a close button (X). The main content area contains a form with the following fields:

- 'Calendar view name *' with a text input field containing 'Cal.Juan'.
- 'Is public' with a checked checkbox.

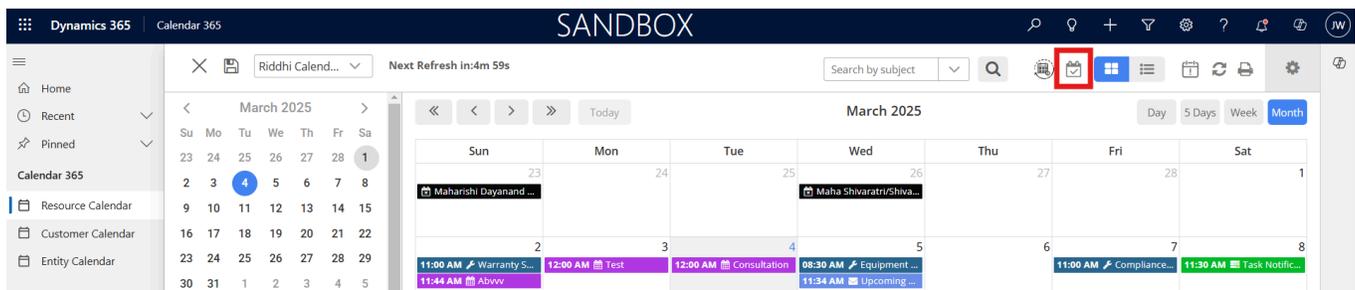
 At the bottom of the dialog, there are two buttons: 'SAVE' and 'CLOSE'.

- 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.

 Calendar Views
✕

Calendar Type:

Saved Calendars
▼

Show 5 entries
Search:

View Name	Is Default	Action
Internal Team view	No	    
Marketing for Dec,	No	   
Milenia's Cal.	No	   
Sales Operational	No	    

Showing 1 to 4 of 4 entries
1

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

 Calendar Views
✕

Calendar Type:

Shared Calendars
▼

Show 5 entries
Search:

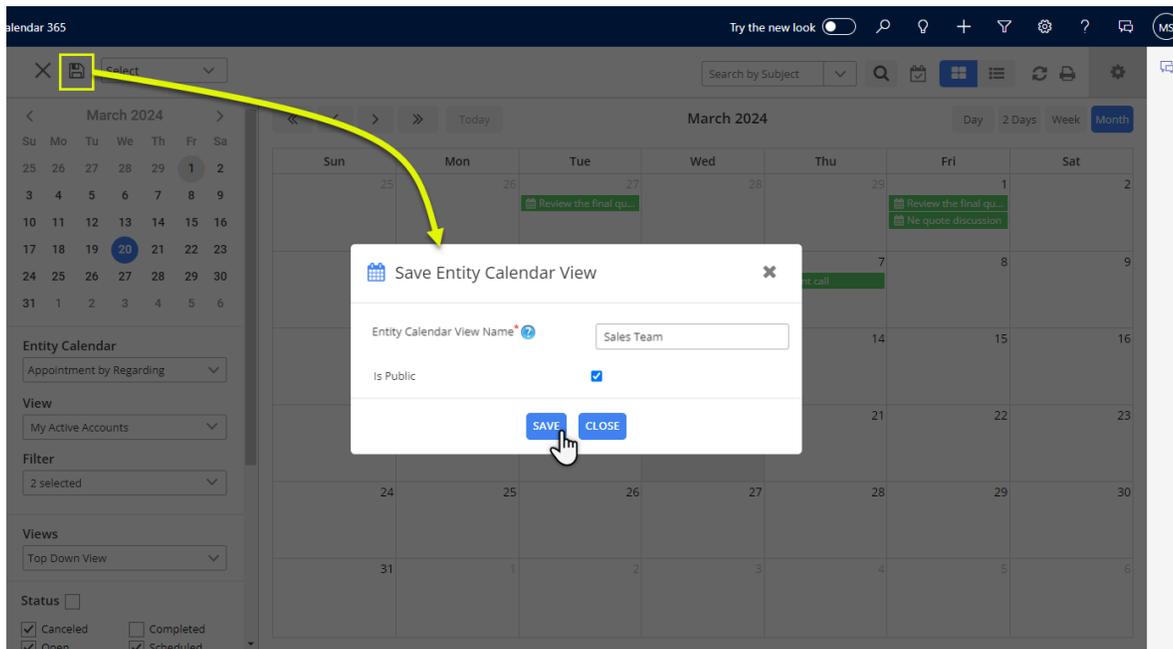
View Name	Is Default	Action
Cal.Juan	Yes	  
Cal.Juan - Agenda View	No	    
Cal.Juan Gantt View	No	   

Showing 1 to 3 of 3 entries
1

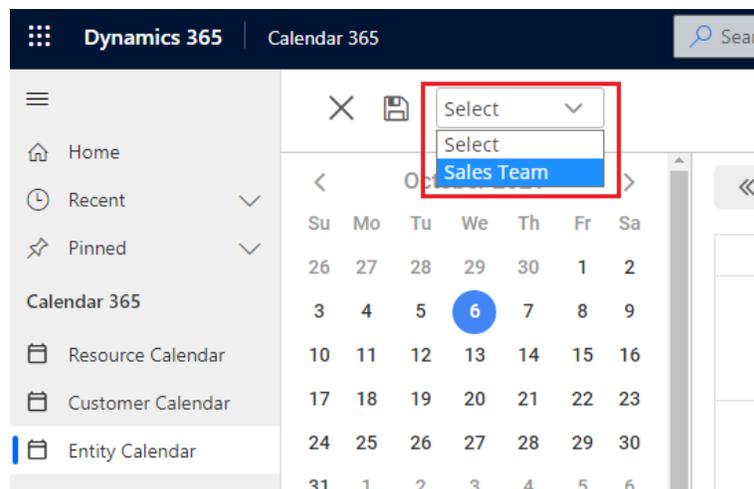
- For saved calendar and being the owner of that calendar, you can View, Edit, Delete and Share calendar. 'Share' option is available only when calendar is private (should not select as 'Is Public').
- Also, different actions are available only when you are the owner of the calendar, else it just shows 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

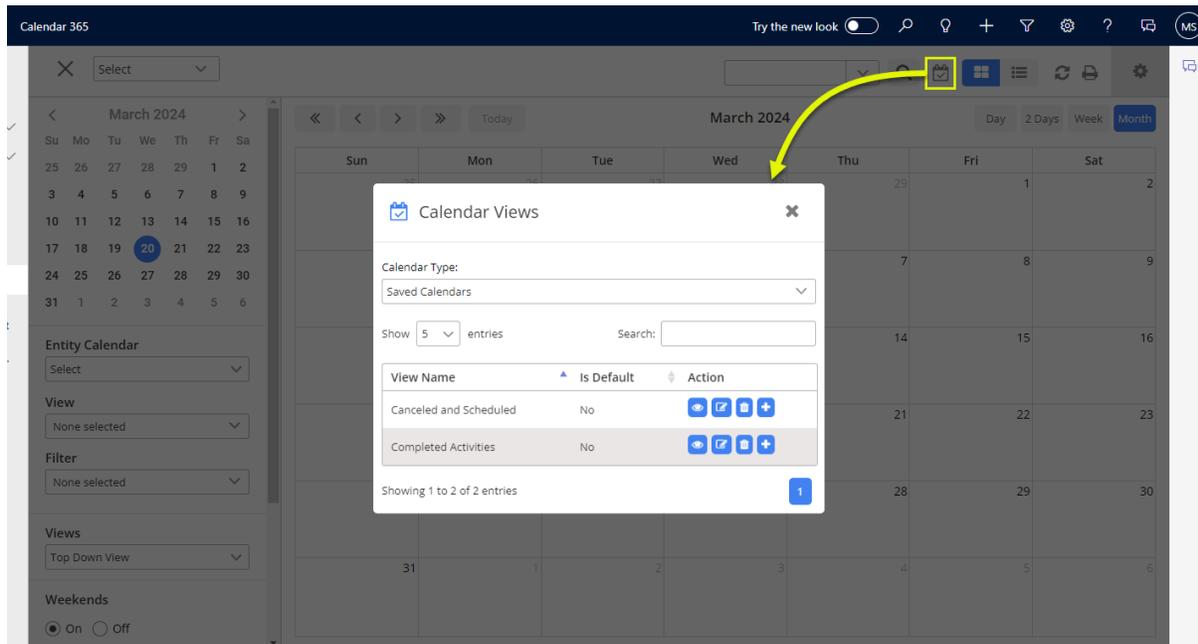
- Similarly, you can save the **Entity Calendar**. By clicking on the 'Save' icon, you will get the popup to insert the calendar name. You can decide whether you want to share with others or keep it private only for your use.



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

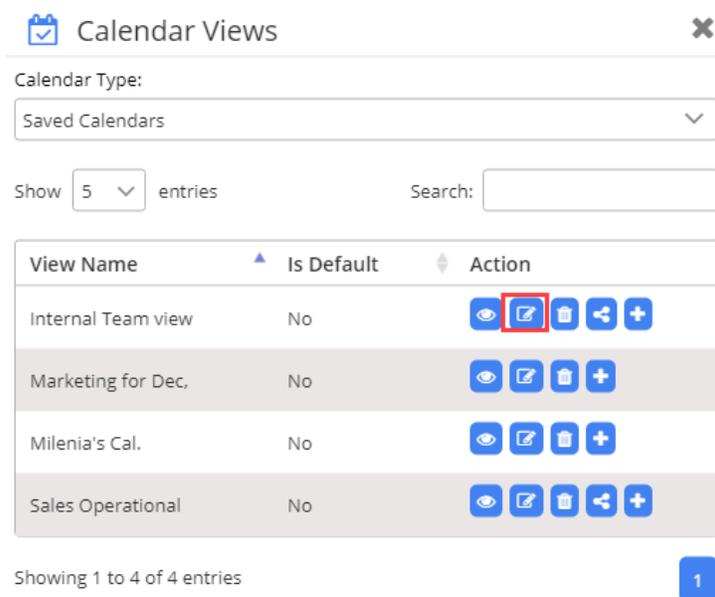


- You and CRM users can access the saved calendar views by clicking on the 'right'  icon that indicates the **View Calendars**.

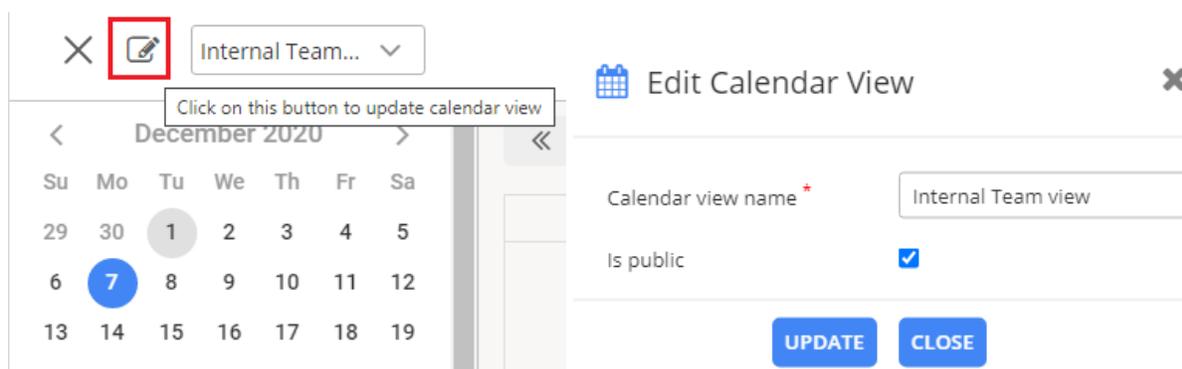


- You can manage and perform the required action like view, edit, delete, and make a default for the saved entity calendar.

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.

 **Calendar Views** ✕

Calendar Type:

Show entries Search:

View Name	Is Default	Action
Cal.Juan	Yes	  
Cal.Juan - Agenda View	No	    
Cal.Juan Gantt View	No	   

Showing 1 to 3 of 3 entries 1

- 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.

 **Share Saved Calendar** ✕

User/Team* 

Look Up Records

Enter your search criteria.

Look for:

Look in:

Search:

<input type="checkbox"/>	Full Name ↑	Position	Main Phn ↻
	Juan Carlos		7698182082
	Mark Carlos		
	Rene Carlos		

1 - 3 of 3 (0 selected) Page 1

Selected records:

Select

Remove

New Add Cancel

- 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.

Calendar Views

Calendar Type:

Saved Calendars

Saved Calendars

Shared Calendars

View Name	Owner	Action
123 test	Jacob hellon	
CalendarViewDemo	Jacob hellon	
Template1	Jacob hellon	

- 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.

 Calendar Views
✕

Calendar Type:

Shared Calendars
▼

Show 5 entries Search:

View Name	Owner	Action
Cal.Mark	Mark Carlos	    

Showing 1 to 1 of 1 entries
1

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

 Calendar Views
✕

Calendar Type:

Saved Calendars
▼

Show 5 entries Search:

View Name	Is Default	Action
Cal.Juan	Yes	  
Cal.Juan	No	   
Cal.Juan - Agenda View	No	    
Cal.Juan Gantt View	No	   
Cal.Mark	No	    

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.

+ Create Activity ×

Activity: Appointment

Subject *

Regarding

Start Date * 05/27/2021 12:00 AM

End Date * 05/28/2021 12:00 AM

All Day Event

Required

A. Datum	Trey Research
Best o' Sales	Contoso, Ltd
Contoso Fabrication	Contoso Instrumen...
Contoso Assembly	Contoso Pharma

Optional

A. Winery	A. Datum
-----------	----------

CREATE

- 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.

+ Create Activity



Subject *

Regarding 

Start Date * 

End Date * 

All Day Event

Required

<input type="text" value="A. Datum"/>	<input type="text" value="Adventure Works"/>	
<input type="text" value="Fabrikam, Inc."/>	<input type="text" value="Lucerne Publishing"/>	
<input type="text" value="Wide World Import..."/>	<input type="text" value="Vincent Lauriant"/>	

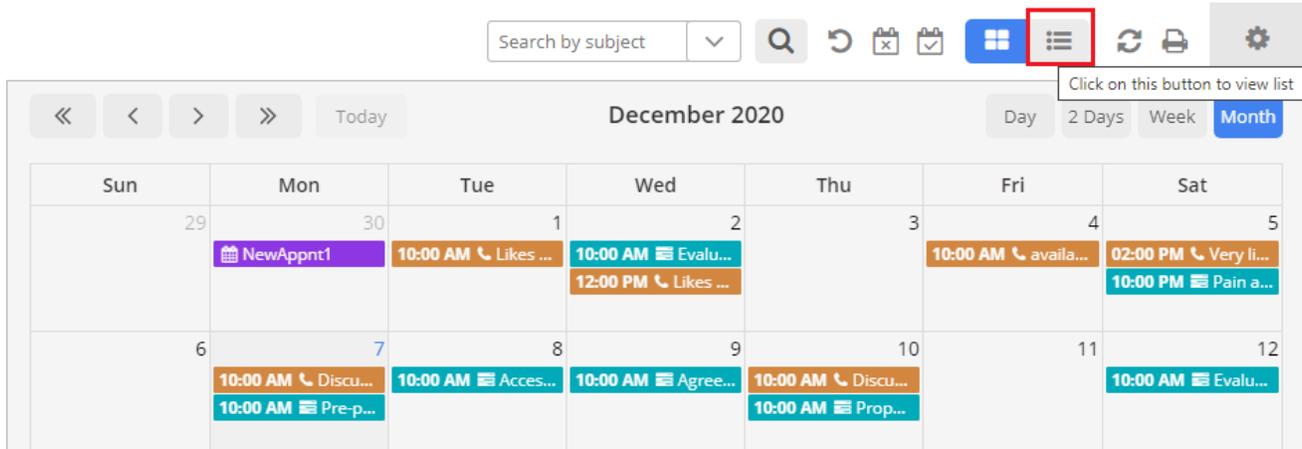
Optional

<input type="text" value="Alpine Ski House"/>	<input type="text" value="Blue Yonder Airlines"/>	
<input type="text" value="City Power & Light"/>	<input type="text" value="Coho Winery"/>	

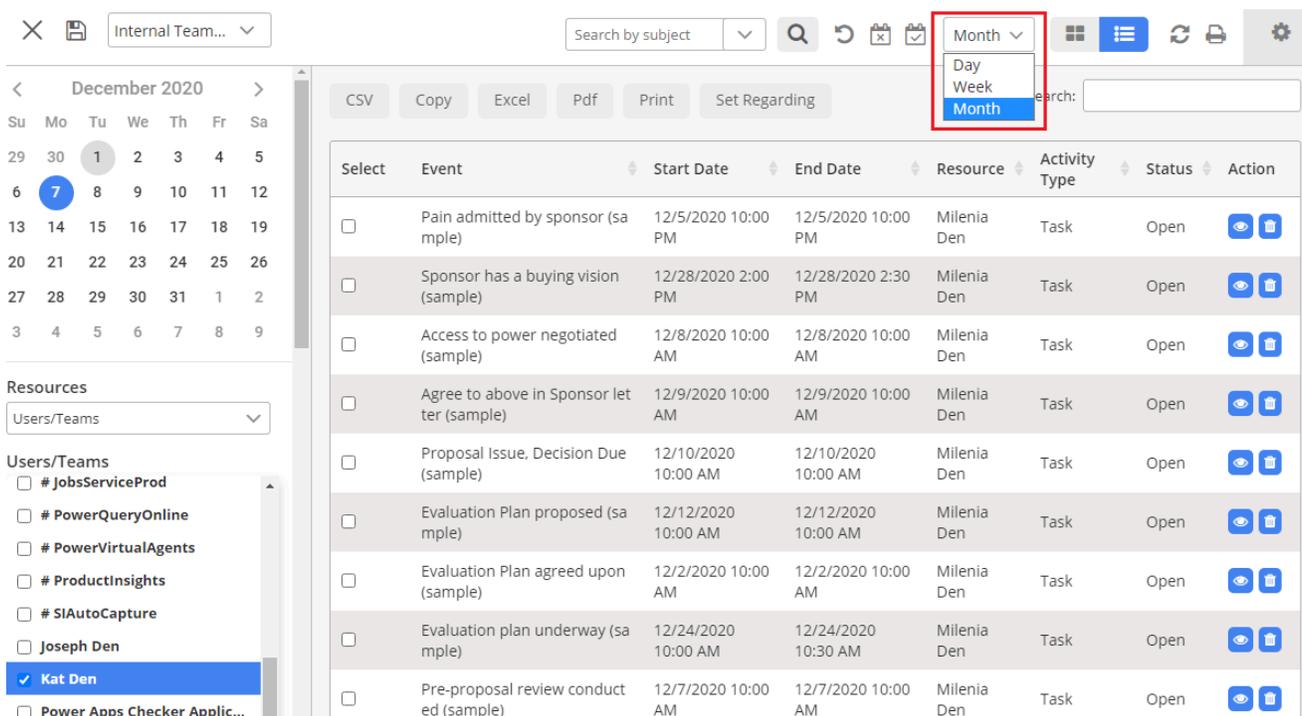
- Once the appointment is created, the other user will also get the appointment in their calendar.
- If you have enabled the **Email** option from the Calendar configuration, the Email will be sent to the Required and Optional attendees that are selected.

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 Pre 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.

Select	Event	Start Date	End Date	Resource	Activity Type	Status	Action
<input checked="" type="checkbox"/>	Pain admitted by sponsor (sample)	12/5/2020 10:00 PM	12/5/2020 10:00 PM	Milenia Den	Task	Open	 
<input checked="" type="checkbox"/>	Sponsor has a buying vision (sample)	12/28/2020 2:00 PM	12/28/2020 2:30 PM	Milenia Den	Task	Open	 
<input checked="" type="checkbox"/>	Access to power negotiated (sample)	12/8/2020 10:00 AM	12/8/2020 10:00 AM	Milenia Den	Task	Open	 
<input checked="" type="checkbox"/>	Agree to above in Sponsor letter (sample)	12/9/2020 10:00 AM	12/9/2020 10:00 AM	Milenia Den	Task	Open	 

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

Set Regarding Record ✕

Choose a regarding field for the selected activities.

Regarding *

SAVE
CLOSE

- 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.

Search by subject

AFFICHER LES CALENDRIE...







<<
<
>
>>
Today

mai 2020

journée
2 Days
La sem...
Mois

lun.	mar.	mer.	jeu.	ven.	sam.	dim.
27	28	29	30	1	2	3
📅 1						
12:00 AM 📅 1						
4	5	6	7	8	9	10
09:00 AM 📅 app_o...	10:00 AM 📅 Tech...					
11	12	13	14	15	16	17
				08:30 AM 📅 Tech...		

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

+ Create Activity ✕

Activity: Appointment

Subject *

Regarding

Start Date * 05/14/2020 12:00 AM

End Date *

mai 2020						
Lu	Ma	Me	Je	Ve	Sa	Di
27	28	29	30	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	7

Required

Optional

Location

Dynamic Date formats

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

+ Create Activity ✕

Activity: Appointment

Subject *

Regarding

Start Date * 05/16/2020 12:00 AM

End Date * 05/17/2020 12:00 AM

Format-1

+ Create Activity ✕

Activity: Appointment

Subject *

Regarding

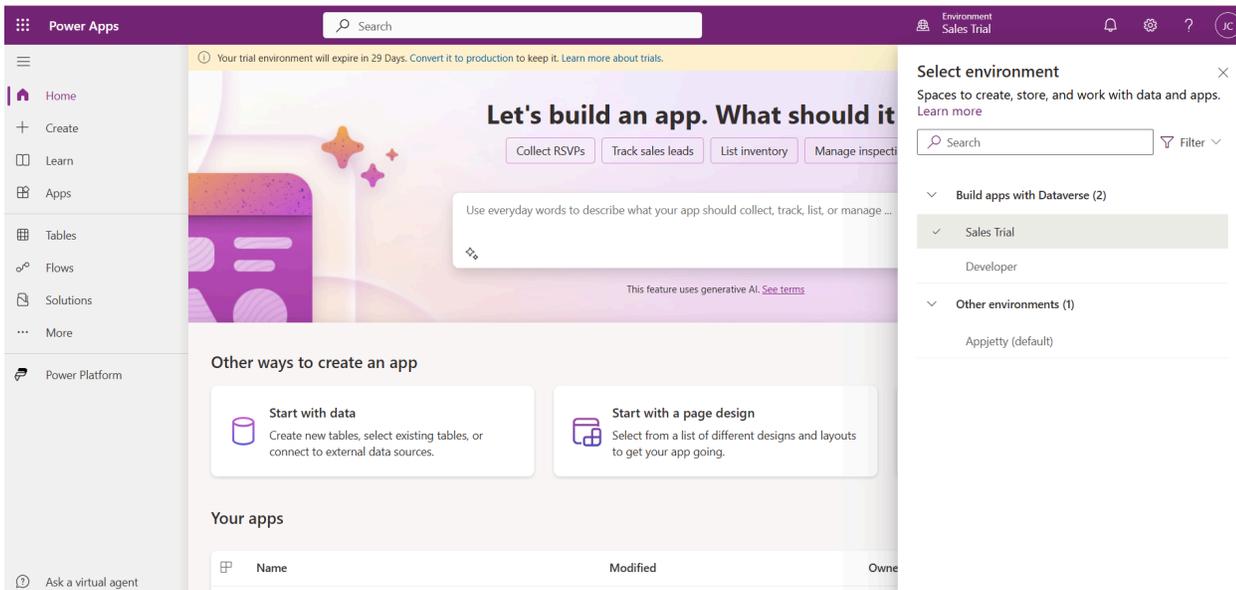
Start Date * 16/05/2020 12:00 AM

End Date * 17/05/2020 12:00 AM

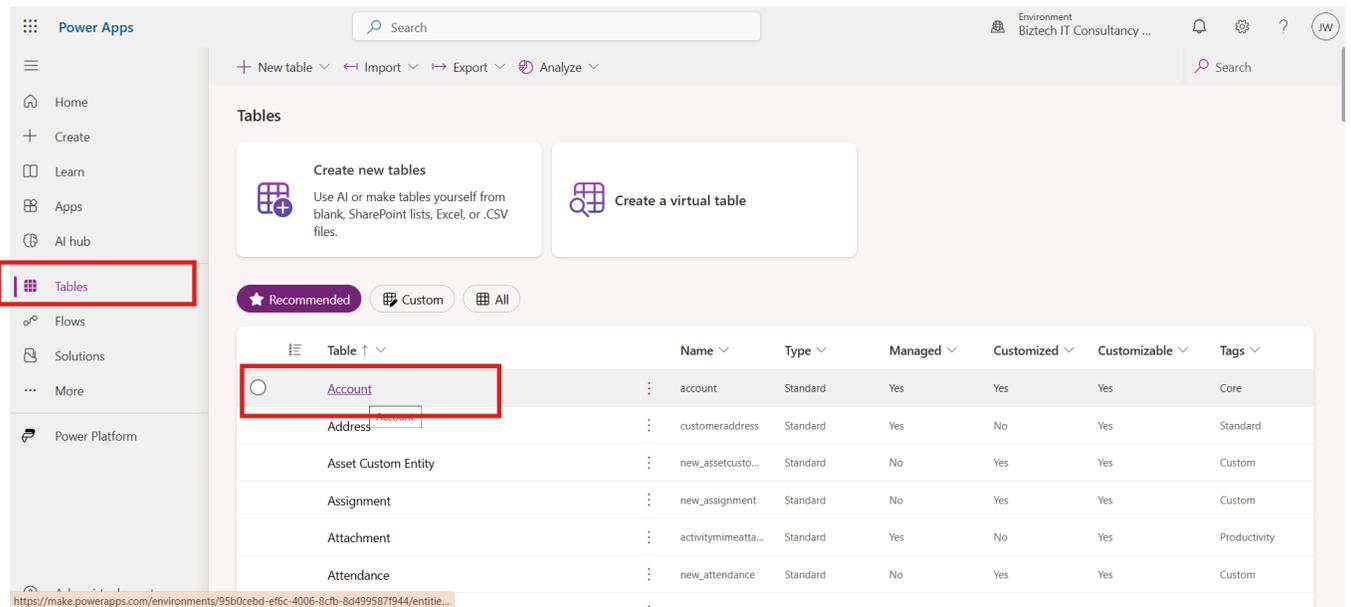
Format-2

Calendar inside entity record

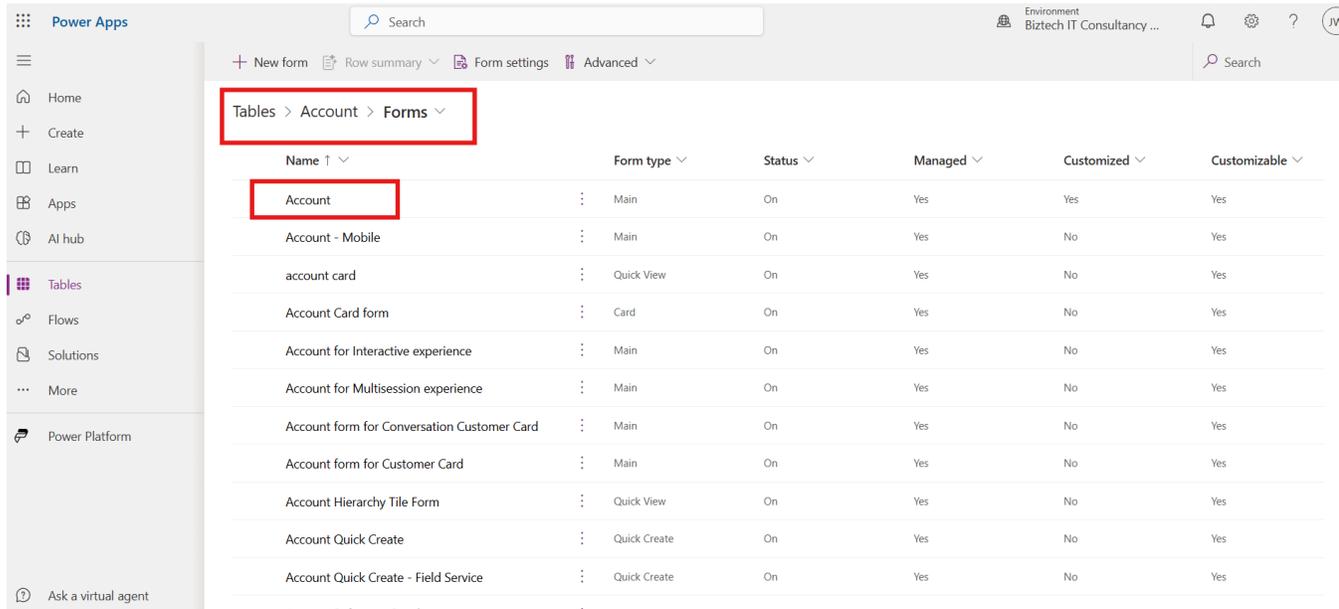
- You can enable the calendar of the Calendar 365 for an individual CRM entity record. You will get the activities on the calendar inside the specific entity record from the DynamicsCRM backend side.
- For that you need to configure the Form and the web resources for the entity. You need to follow the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



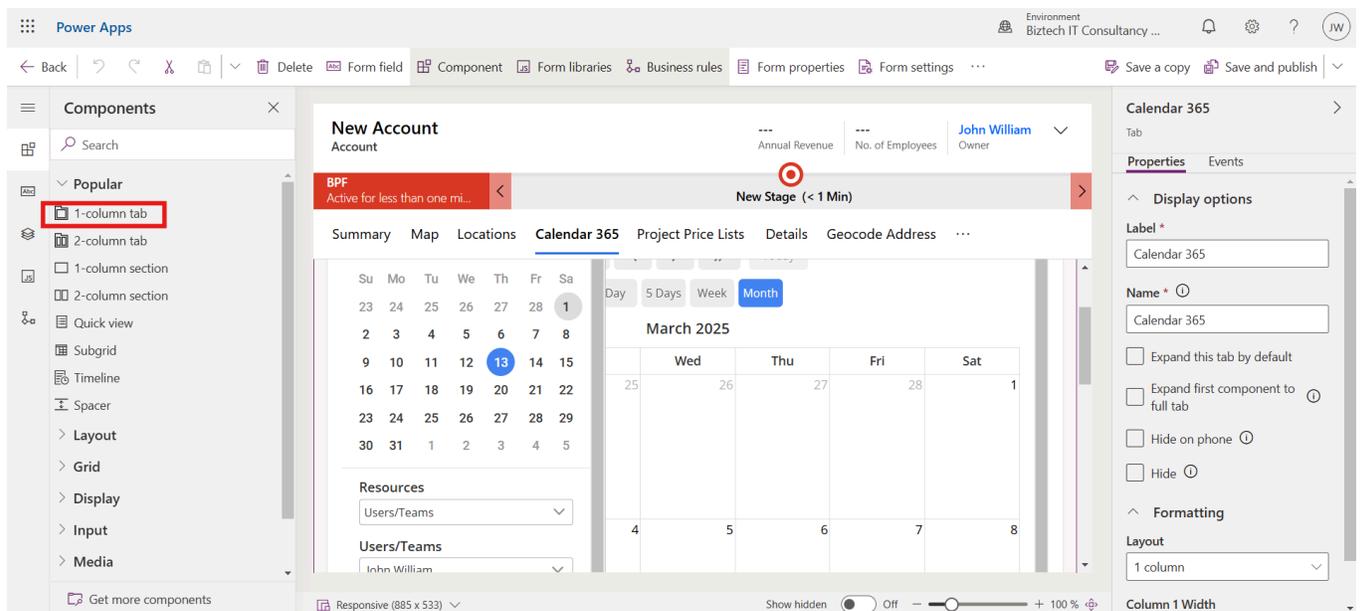
- Select the entity in which you want to add the calendar



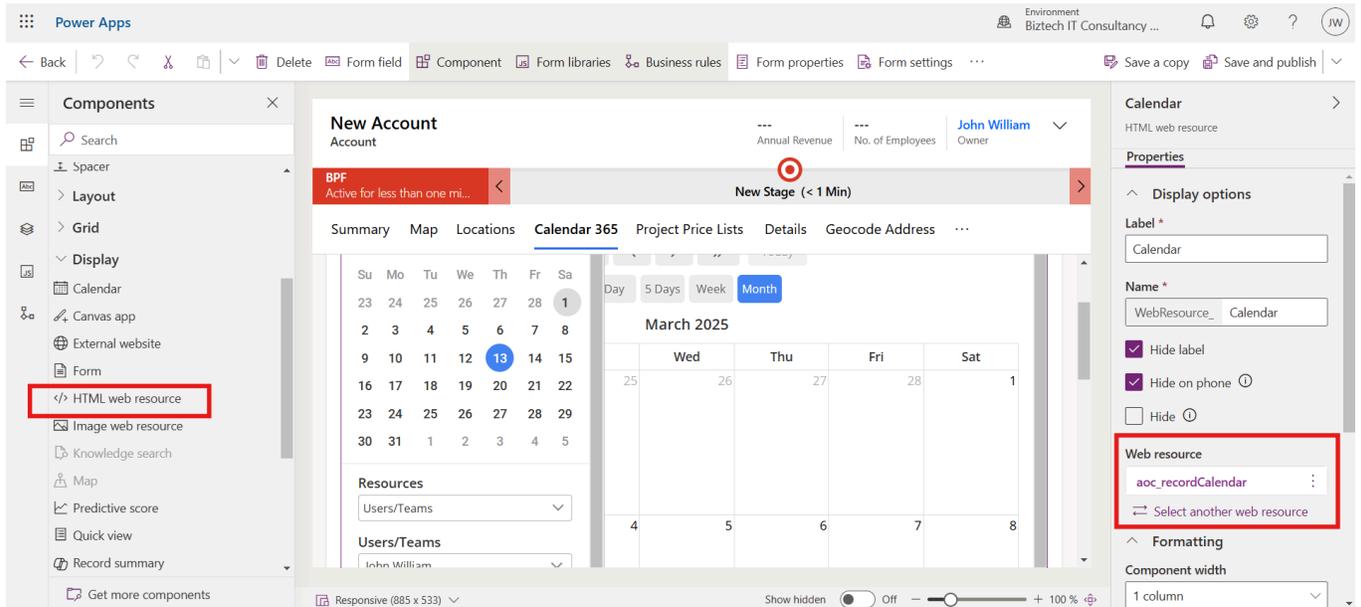
- Click on the Table (i.e. Account) 'Forms' to configure the record calendar.



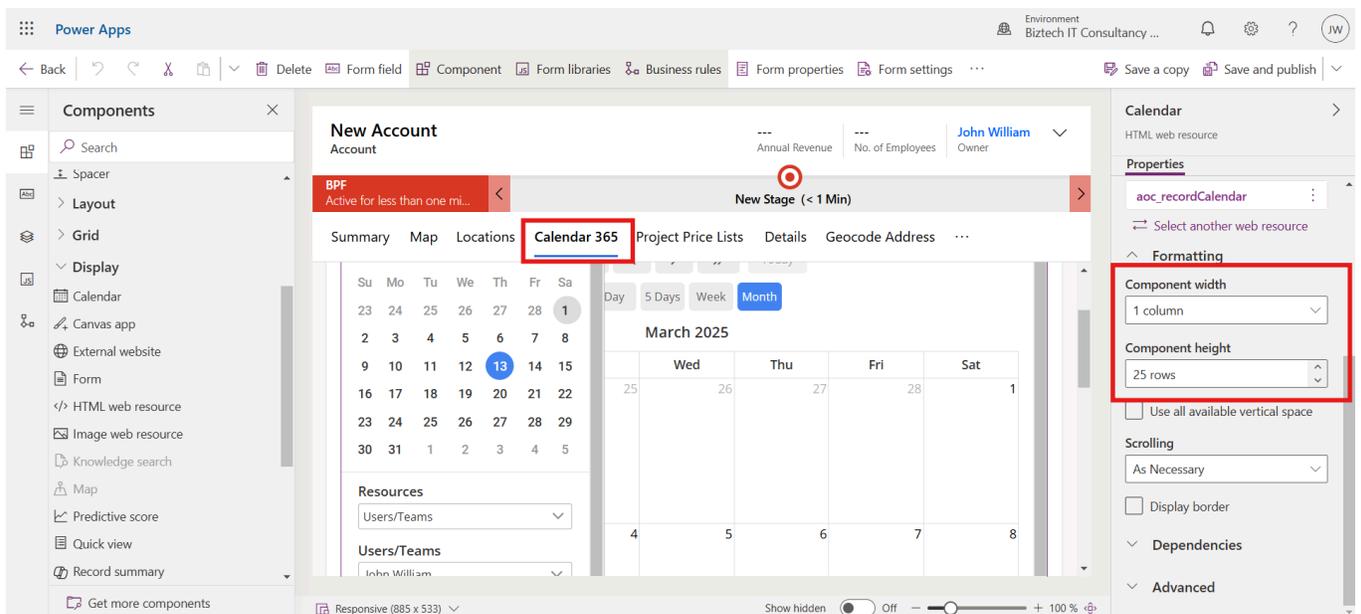
- o Insert the Tab as per the layout that you want to be displayed. *i.e.* One Column. It will add a tab to the entity form.



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



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



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

Dynamics 365 | Sales Hub SANDBOX

Home Recent Pinned My Work Sales accelerator Activities Dashboards Customers Accounts Contacts Calendar 365 Sales Leads Opportunities Competitors Collateral Quotes Orders Invoices Sales

Adele Boyes - Saved Account - Account Annual Revenue No. of Employees John William Owner

Summary Map Locations Calendar 365 Project Price Lists Details Geocode Address Mappyfield 365 Insights Insurance Tab Warranties Trade Coverages Related

Riddhi Calend... Next Refresh in: 4m 58s Search by subject VIEW CALENDARS

March 2025 Today Day 5 Days Week Month

Su	Mo	Tu	We	Th	Fr	Sa
23	24	25	26	27	28	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

Resources
Users/Teams: John William

Views
Top Down View

Activities Task Fax

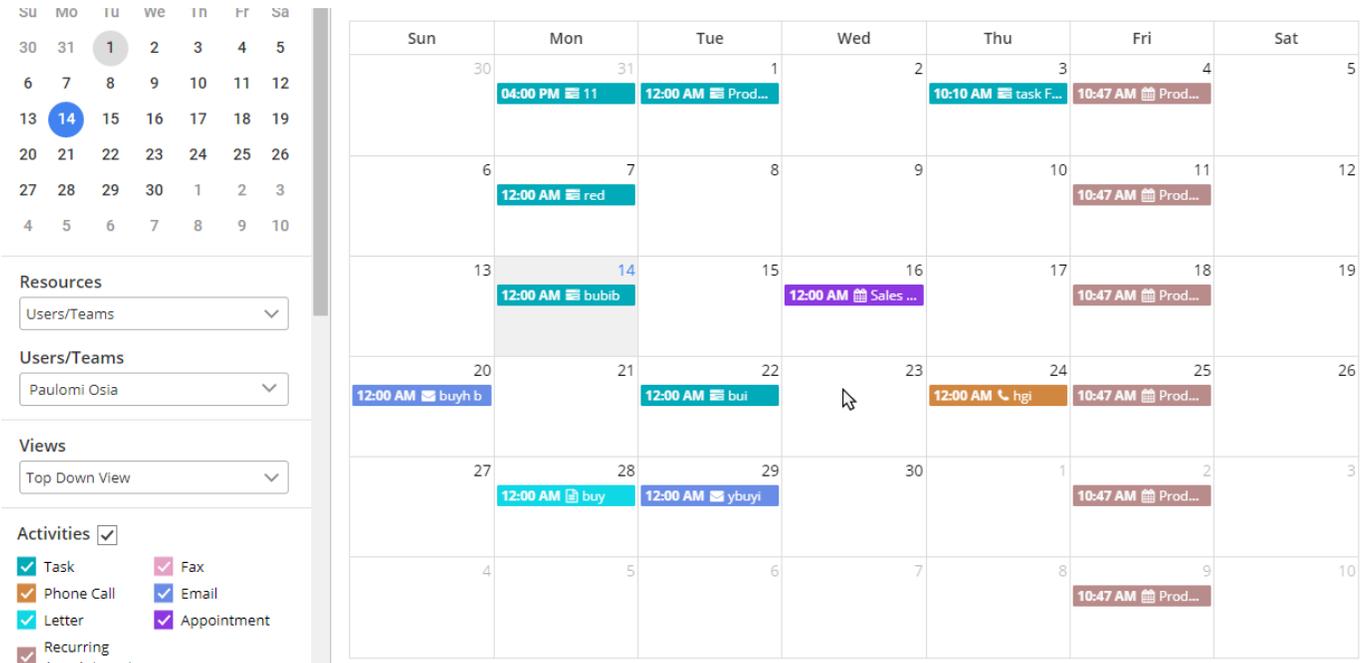
Calendar grid details: Sun 23, Mon 24, Tue 25, Wed 26, Thu 27, Fri 28, Sat 1. Activities: 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15. Activity on Tue 3: 11:00 AM Onsite Technic...

- o 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 :

+ Create an Activity
✕

Activity ▼

Appointment

Subject *

Regarding 🔍

Start Date * 📅

03/20/2024 12:00 AM

End Date * 📅

03/21/2024 12:00 AM

- 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.

+ Create an Activity ✕

Activity

Subject *

Regarding 🔍

Start Date * 📅

End Date * 📅

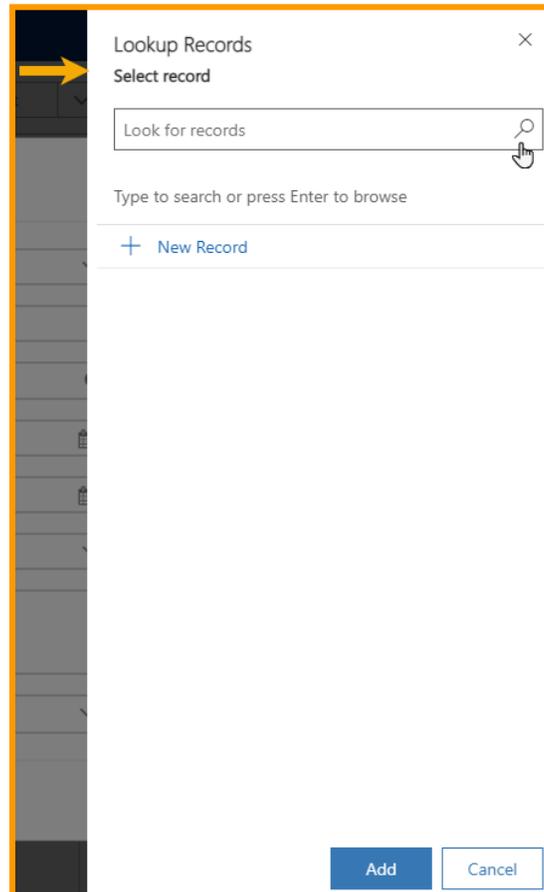
All Day Event

Required 🔍

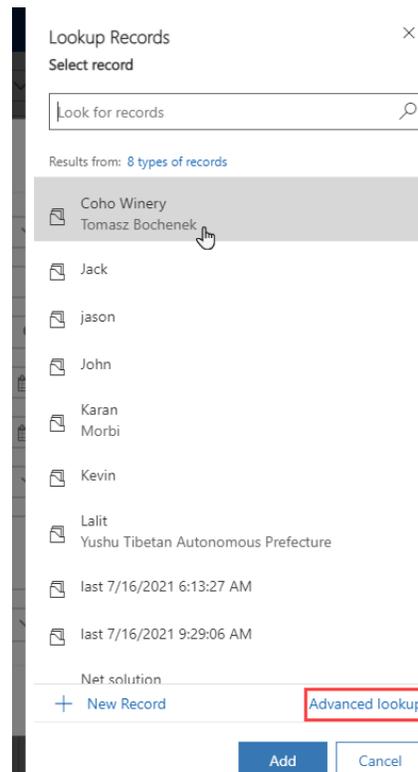
Optional 🔍

Location

- 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.

Choose contacts ✕

Tables

- Accounts
- Campaign Activities
- Campaigns
- Cases
- Contacts**
- Contracts
- Entitlement Templates
- Entitlements
- Invoices
- Knowledge Articles

Contacts Lookup View (default) Only my records

	Full Name ↑ ↓	Email ↓	Business Phone ↓	Company Name ↓	Address 1: City ↓	Address
<input type="radio"/>	Abyss Des	no23@gmail.com				
<input type="radio"/>	Alex Baker	alex@tresearch.net	619-555-0127	Trey Research	San Francisco	
<input checked="" type="radio"/>	Avery Howard	avery@tresearch.net	567-555-0137	Trey Research	Dallas	
<input type="radio"/>	Cacilia Viera	cacilia@alpineskihouse.com	281-555-0162	Alpine Ski House	Dallas	
<input type="radio"/>	Carla Yates	carla@tresearch.net	456-555-0156	Trey Research	North Dartmo...	
<input type="radio"/>	charlottejames0932	charlottejames0932@gmail.com				
<input type="radio"/>	Dwayne Elijah	dwayne@alpineskihouse.com	281-555-0160	Alpine Ski House	Dallas	
<input type="radio"/>	Haroun Stormonth	haroun@fabrikaminc.com	423-555-0122	Fabrikam, Inc.	Lynnwood	
<input type="radio"/>	Heriberto Nathan	heriberto@northwindtraders.com	614-555-0123	Northwind Traders	Huntington	
<input type="radio"/>	ipsled	ipsled@appjetty0866.onmicrosoft.c...				

Selected record

Done
Cancel

- 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.

+

Create an Activity

✕

Activity ▼

Appointment

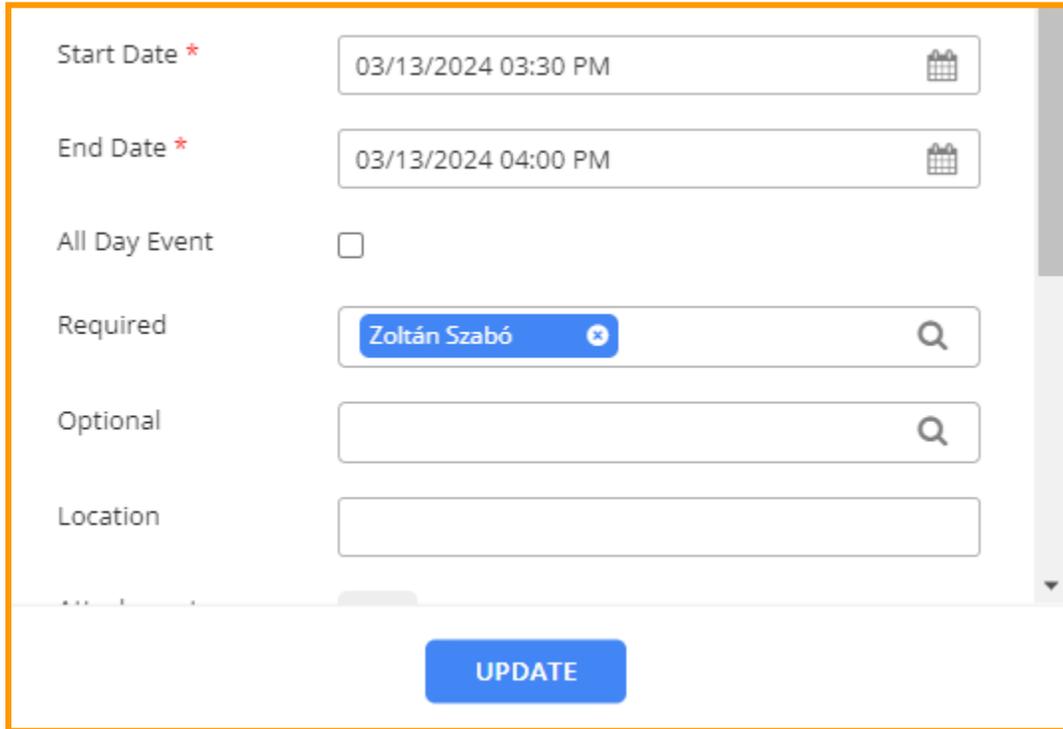
Subject *

Technical Analysis and Discussion

Regarding

Avery Howard

✕
🔍



The screenshot shows a form for creating an event. It includes fields for Start Date (03/13/2024 03:30 PM), End Date (03/13/2024 04:00 PM), All Day Event (checkbox), Required (Zoltán Szabó), Optional, and Location. An UPDATE button is at the bottom.

Start Date *	03/13/2024 03:30 PM
End Date *	03/13/2024 04:00 PM
All Day Event	<input type="checkbox"/>
Required	Zoltán Szabó
Optional	
Location	

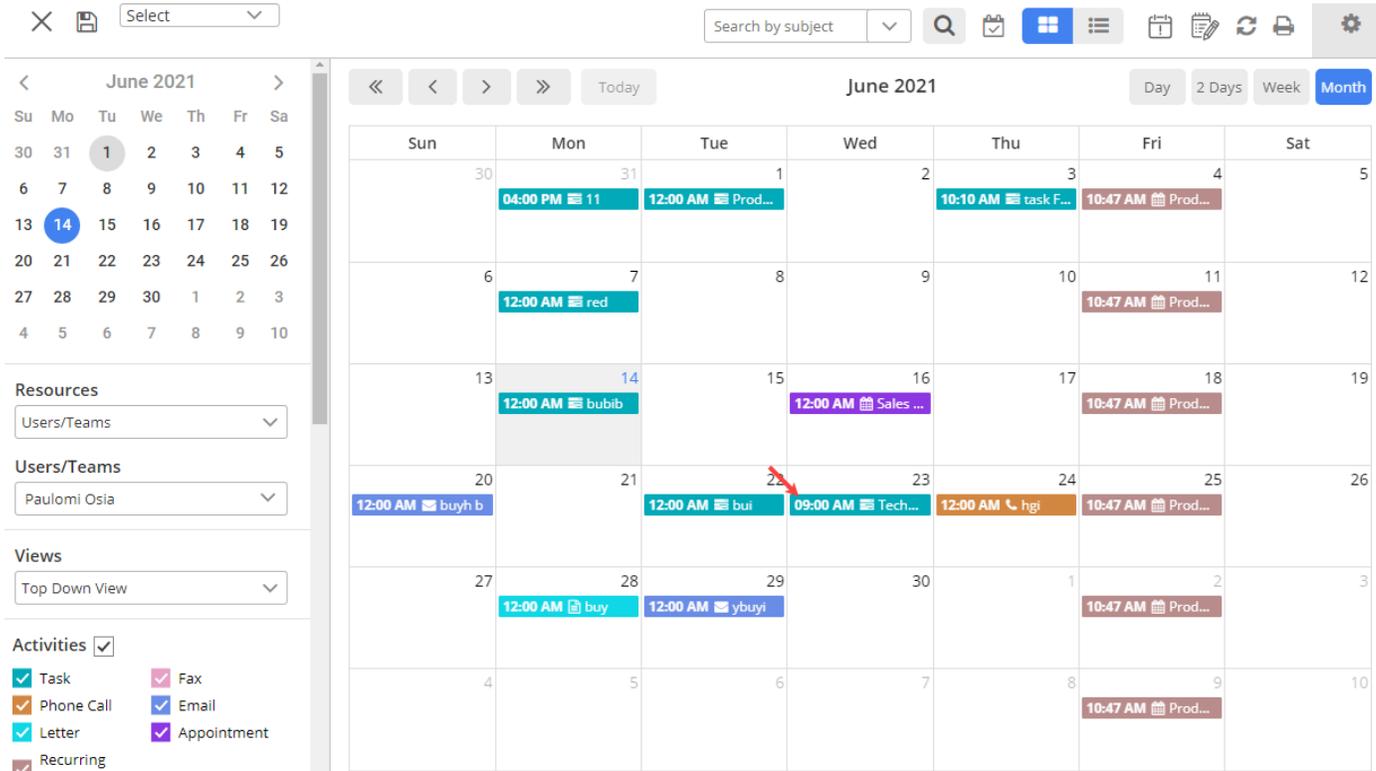
UPDATE

- **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.

Location	<input type="text"/>
Attachment	<input data-bbox="456 218 532 279" type="button" value="+"/>
Priority	<input data-bbox="456 315 1096 373" type="text" value="Normal"/>
Description	<input data-bbox="456 409 1096 546" type="text"/>
Owner	<input data-bbox="456 581 1096 640" type="text" value="Michael Smith"/>

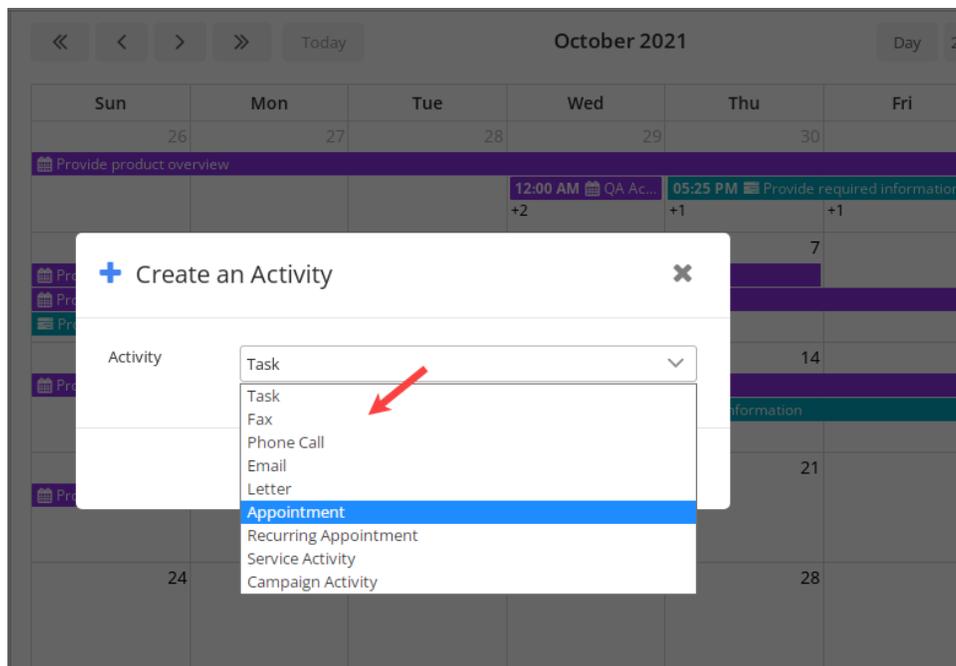
UPDATE

- **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.

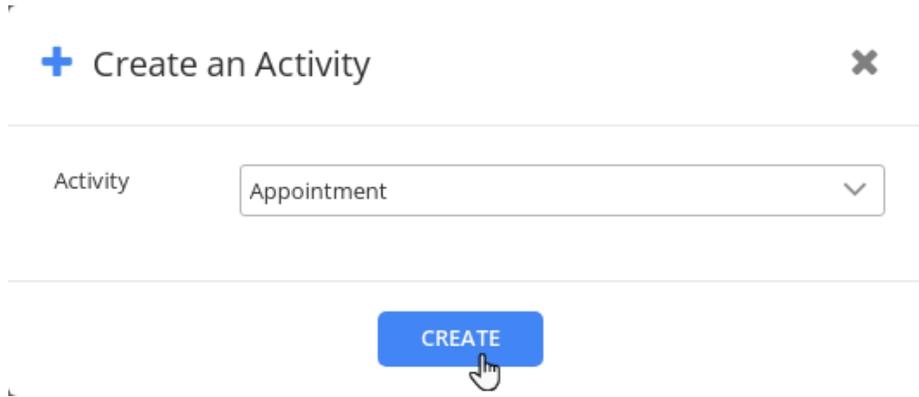


Quick Create Activity (CRM Form)

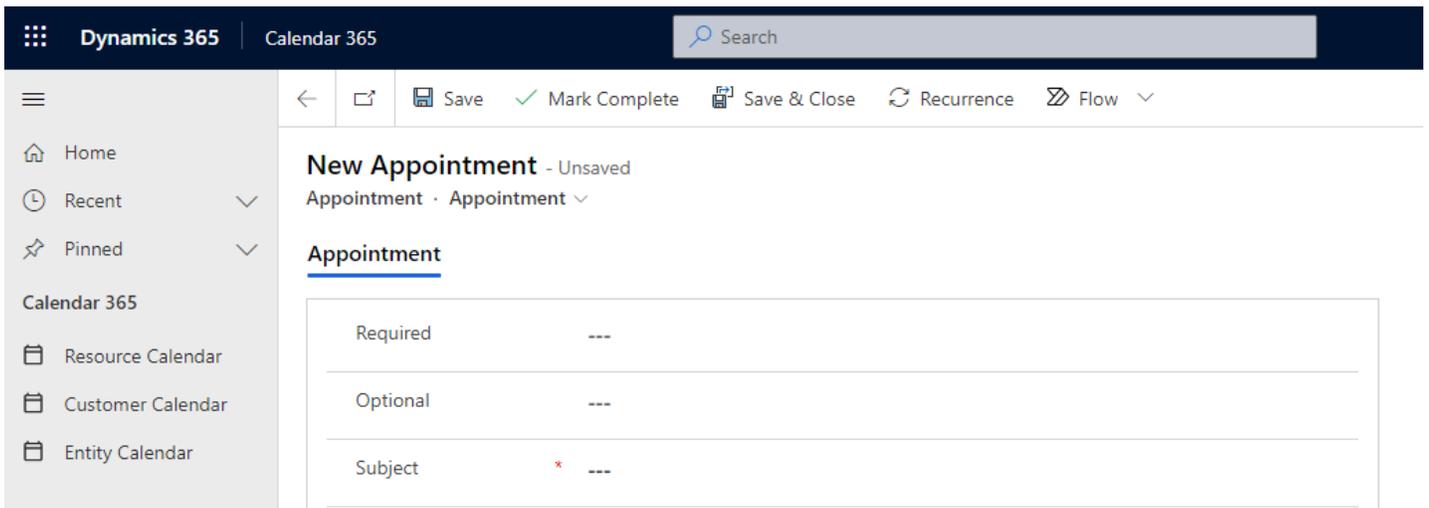
- If you have enabled the **Quick Create Form** option from “Calendar Configuration ☑ Advance Settings”, you will get the CRM backend view (CRM Form view) to create the activity.



- 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.

+ Create Activity
×

Activity

Subject *

Regarding

Start Date *

End Date *

All Day Event

Required

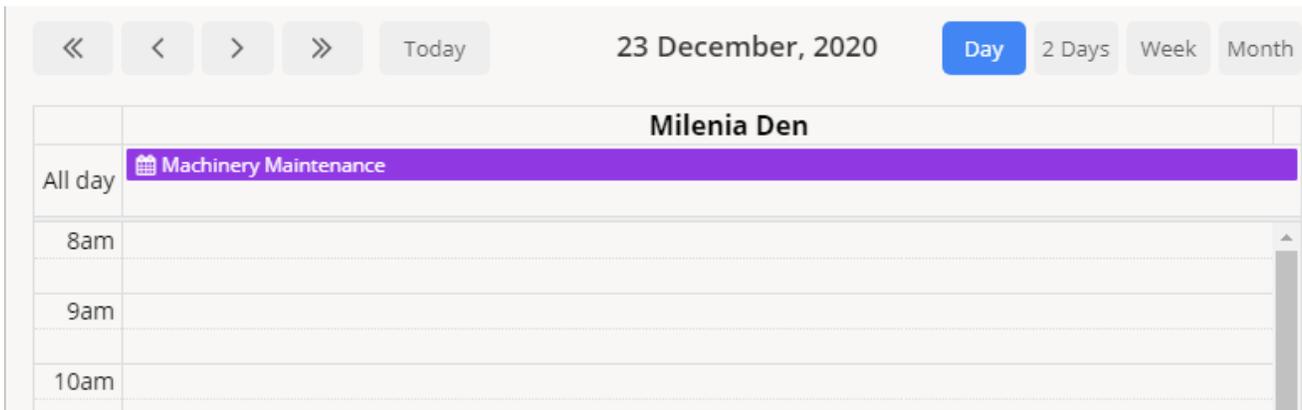
Optional

Location

[CREATE](#)

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

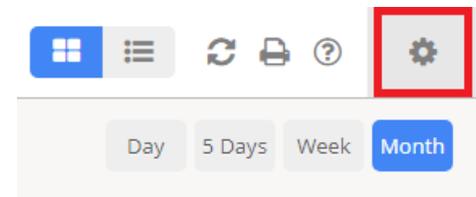
- Every “all day” appointment will be seen at the top of day/week/ day view in the **All day** slot.



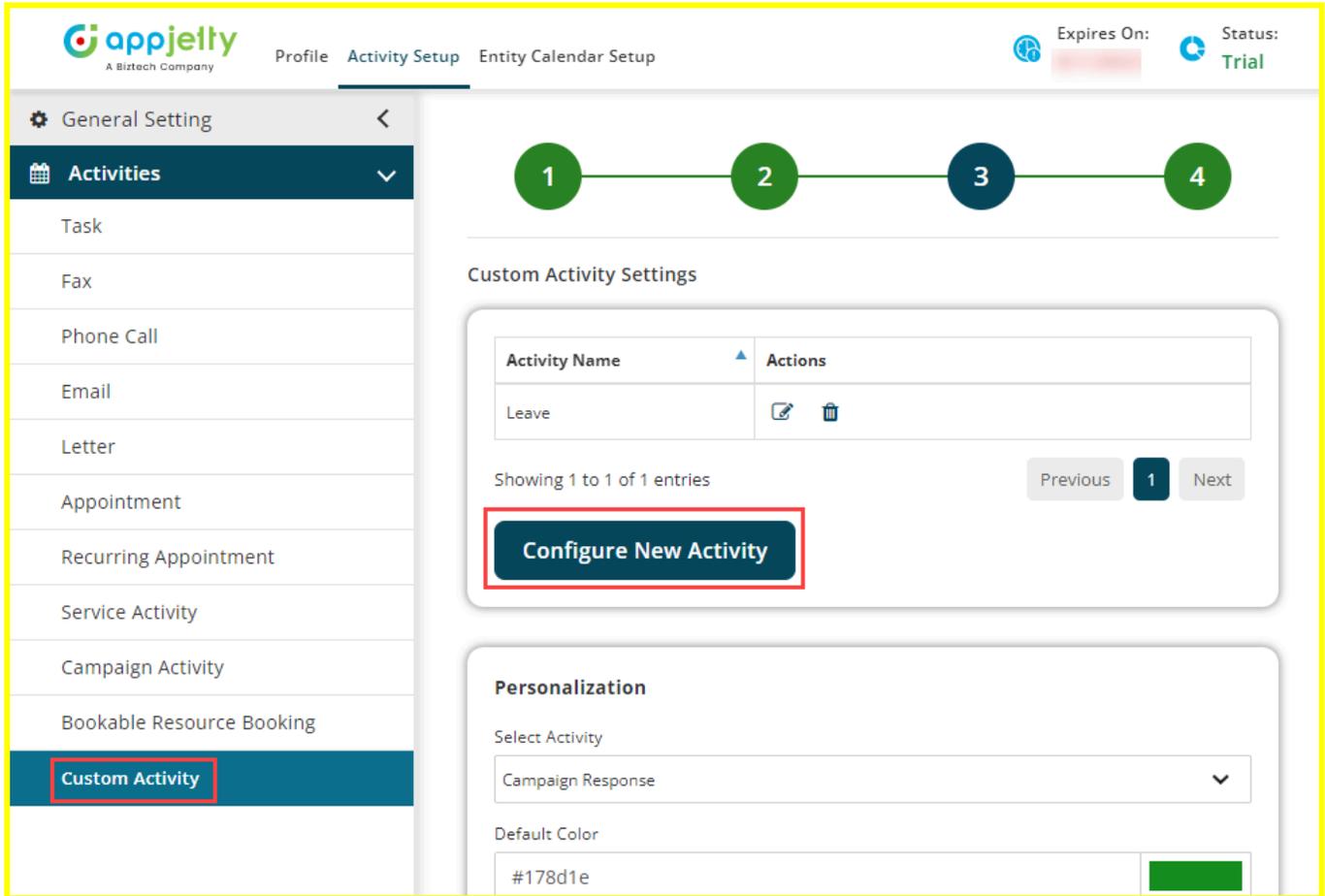
The screenshot shows a calendar interface for the date 23 December, 2020. At the top, there are navigation arrows and buttons for 'Today', 'Day', '2 Days', 'Week', and 'Month'. The 'Day' view is selected. Below the navigation, the name 'Milenia Den' is displayed. The calendar grid shows an 'All day' slot at the top, which is highlighted in purple and contains an event titled 'Machinery Maintenance' with a calendar icon. Below the 'All day' slot, the time slots for 8am, 9am, and 10am are visible and currently empty.

Create a Custom Activity

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



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



The screenshot shows the 'Activity Setup' page in Appjelly. The left sidebar has a 'Custom Activity' tab highlighted. The main content area is titled 'Custom Activity Settings' and features a progress indicator with four steps (1, 2, 3, 4). Below this is a table with one entry:

Activity Name	Actions
Leave	 

Below the table, it says 'Showing 1 to 1 of 1 entries' with 'Previous', '1', and 'Next' buttons. A 'Configure New Activity' button is highlighted with a red box. Below the table is a 'Personalization' section with a 'Select Activity' dropdown menu set to 'Campaign Response' and a 'Default Color' field set to '#178d1e'.

- 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.

The screenshot shows the 'Activity Setup' page in the Appjetly dashboard. The left sidebar has 'Custom Activity' highlighted. The main content area features a progress bar with four steps (1-4), where step 3 is active. Below this is a table titled 'Custom Activity Settings' with one entry: 'Leave'. The 'Actions' column for 'Leave' contains 'Edit' and 'Delete' icons. A 'Configure New Activity' button is highlighted with a red box. Below the table is a 'Personalization' section with a 'Select Activity' dropdown set to 'Campaign Response' and a 'Default Color' field set to '#178d1e'.

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

This is a close-up of the 'Custom Activity Settings' table. It shows a single row for the activity 'Leave'. The 'Actions' column for this row contains two icons: an edit icon and a delete icon, both of which are highlighted with a red box. Below the table, there is a 'Configure New Activity' button.

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

 Leave
✕

Bad Health






Due Date:	8/6/2022 12:00 AM
Owner:	Prakash Bambhania
Priority:	Normal
Regarding:	-
Start Date:	8/5/2022 12:00 AM

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

 Leave
✕

Bad Health

Due Date:	8/6/2022 12:00 AM
Owner:	Prakash Bambhania
Priority:	Normal
Regarding:	-
Start Date:	8/5/2022 12:00 AM

Location selection

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

Location

Man

 **Manchester** UK

 **Mannheim** Germany

 **Manali** Himachal Pradesh, India

 **Manila** Metro Manila, Philippines

 **Manesar, National Highway 48** Gurugram, Haryana, India

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.

+ Create Activity ×

Activity	Appointment ▼
Subject *	<input type="text"/>
Regarding	<input type="text"/> 🔍
Start Date *	12/11/2020 12:00 AM 📅
End Date *	12/12/2020 12:00 AM 📅
All Day Event	<input type="checkbox"/>
Required	<input type="text"/> 🔍
Optional	<input type="text"/> 🔍
Location	<input type="text"/>
Attachment	<input type="button" value="+"/>

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

Add Attachment ×

File Name: No file chosen

- 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.

Attachment +
 E-Ticket _ Eagle Falcon Bus 🗑️

Priority Normal ▼

Description

Owner Milenia Den ▼

CREATE

- 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.

6	7	8
12:00 AM 📠 Fax to Charline	10:10 AM ✉️ Email To Johny	10:00 AM 📄 Technical Do...
13	14	15
12:00 AM 📄 Letter Event	12:00 AM 📠 📅 Discussio...	

View & Manage Activity

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

7	8	9
	10:00 AM 📄 Evalu...	
	02:50 PM 📅 Revie...	
14	15	16
10:00 AM 📞 availa...	02:00 PM 📞 Very li...	
	02:50 PM 📅 Revie...	
	10:00 PM 📄 Pain a...	

- 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.

 Update Record ✕

End Time * 

Owner * 

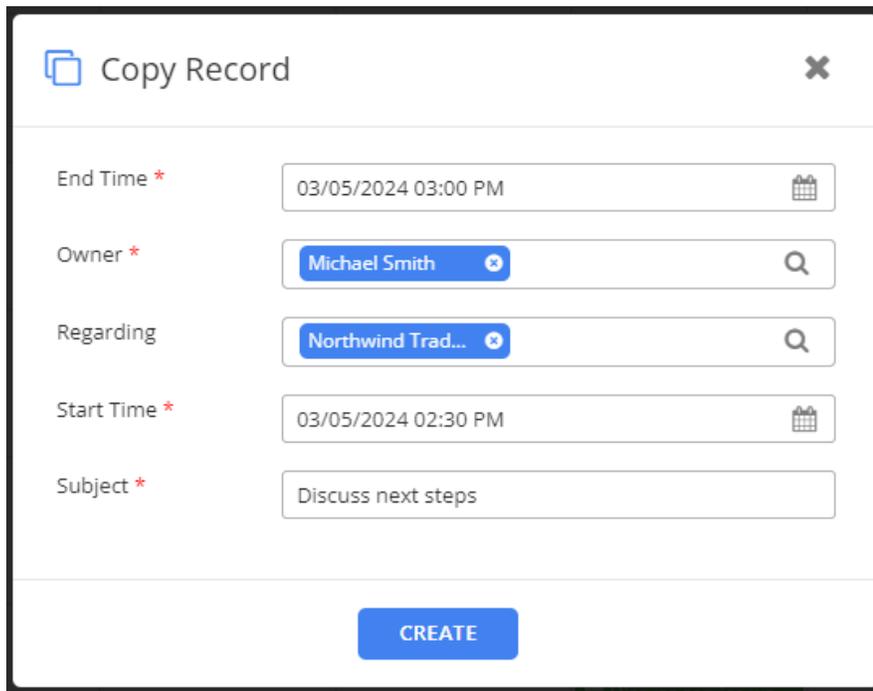
Regarding 

Start Time * 

Subject *

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.



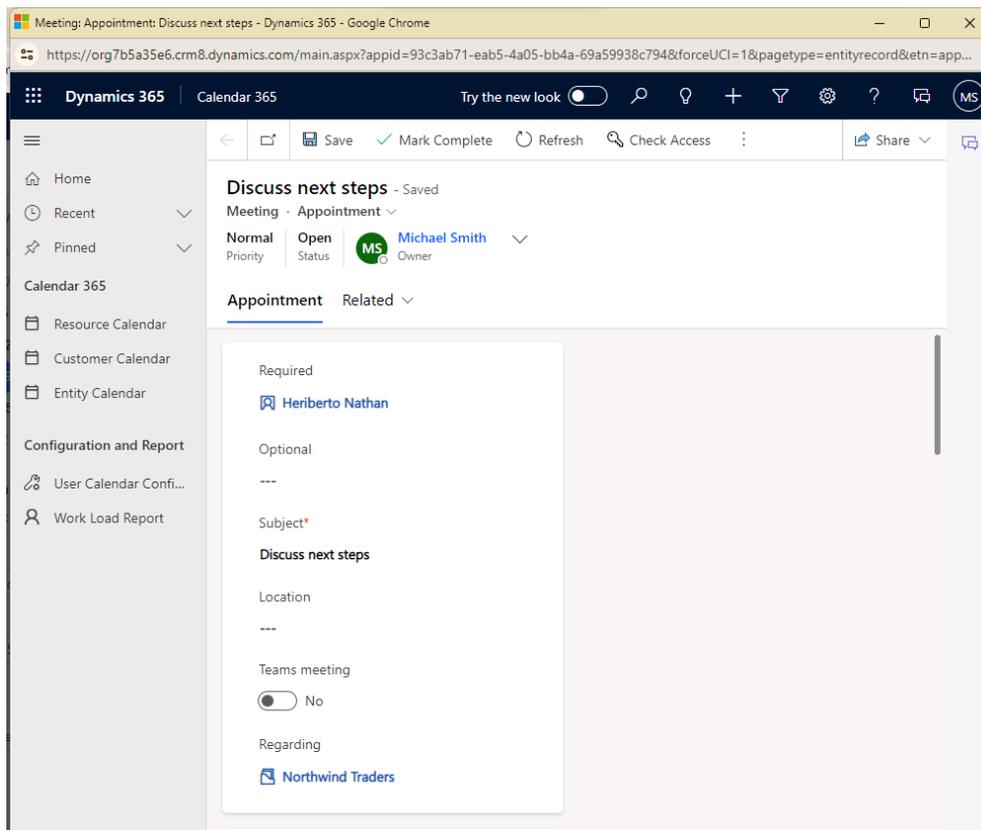
The image shows a 'Copy Record' pop-up window. It has a title bar with a copy icon and a close button. The form contains the following fields:

- End Time ***: 03/05/2024 03:00 PM (with a calendar icon)
- Owner ***: Michael Smith (with a search icon)
- Regarding**: Northwind Trad... (with a search icon)
- Start Time ***: 03/05/2024 02:30 PM (with a calendar icon)
- Subject ***: Discuss next steps

At the bottom of the form is a blue button labeled 'CREATE'.

View Icon

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



The image shows a screenshot of the Dynamics 365 interface. The browser address bar shows the URL: <https://org7b5a35e6.crm8.dynamics.com/main.aspx?appid=93c3ab71-eab5-4a05-bb4a-69a59938c794&forceUCI=1&pagetype=entityrecord&etn=app...>

The Dynamics 365 interface shows the following details for the meeting:

- Title**: Discuss next steps - Saved
- Meeting**: Appointment
- Priority**: Normal
- Status**: Open
- Owner**: Michael Smith (MS)

The 'Appointment' tab is selected, showing the following details:

- Required**: Heriberto Nathan
- Optional**: ---
- Subject***: Discuss next steps
- Location**: ---
- Teams meeting**: No
- Regarding**: Northwind Traders

Delete icon

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

Warning ✕

Do you really want to delete this activity?

OK

CLOSE

Resource and Customer Calendar

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

Task ✕

FD 02



End Date: 8/16/2022 12:00 AM

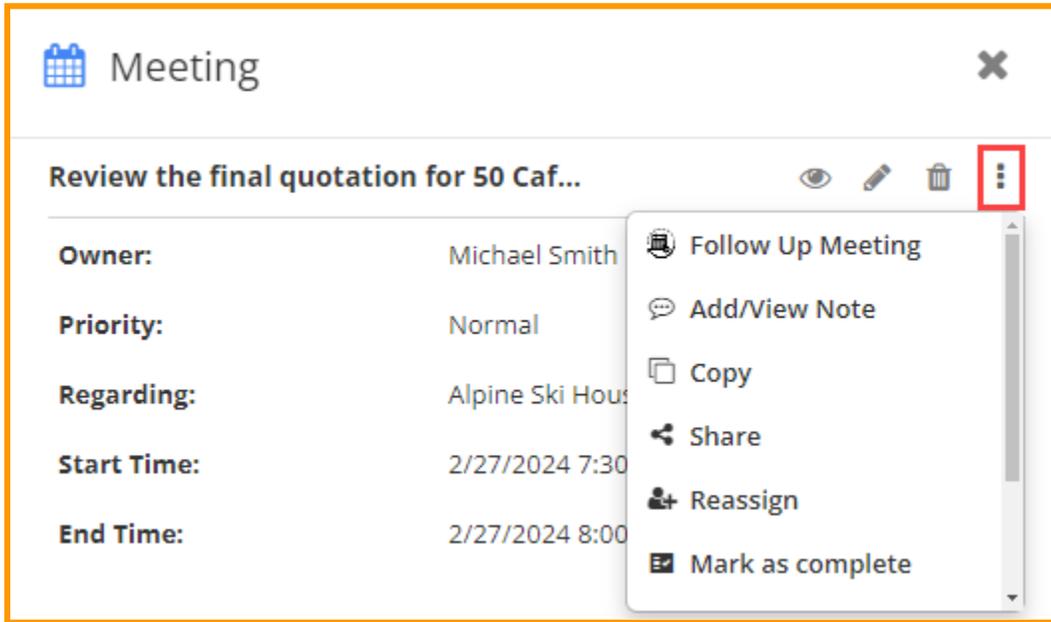
Owner: Prakash Bambhania

Priority: Normal

Regarding: Amusement Park 2

Start Date: 8/15/2022 12:00 AM

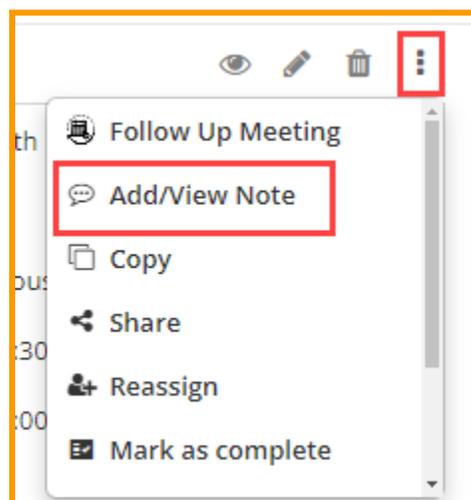
By clicking on the More Options (Three Dot) icon, you will get additional options like Follow Up Meeting, Add/View Record, Copy activity, Share activity, Reassign activity to another user, Mark as Complete, Mark as Cancel, Convert to Opportunity, & Convert to Case.



- From this Activity Detail dialog box, you can perform resultant action for the activity.
- You can perform actions:
 - o Convert to opportunity
 - o Convert to case
 - o Convert to lead' (Only for email activity)
 - o 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.



Notes ✕

Title

Enter A Note

File Name:

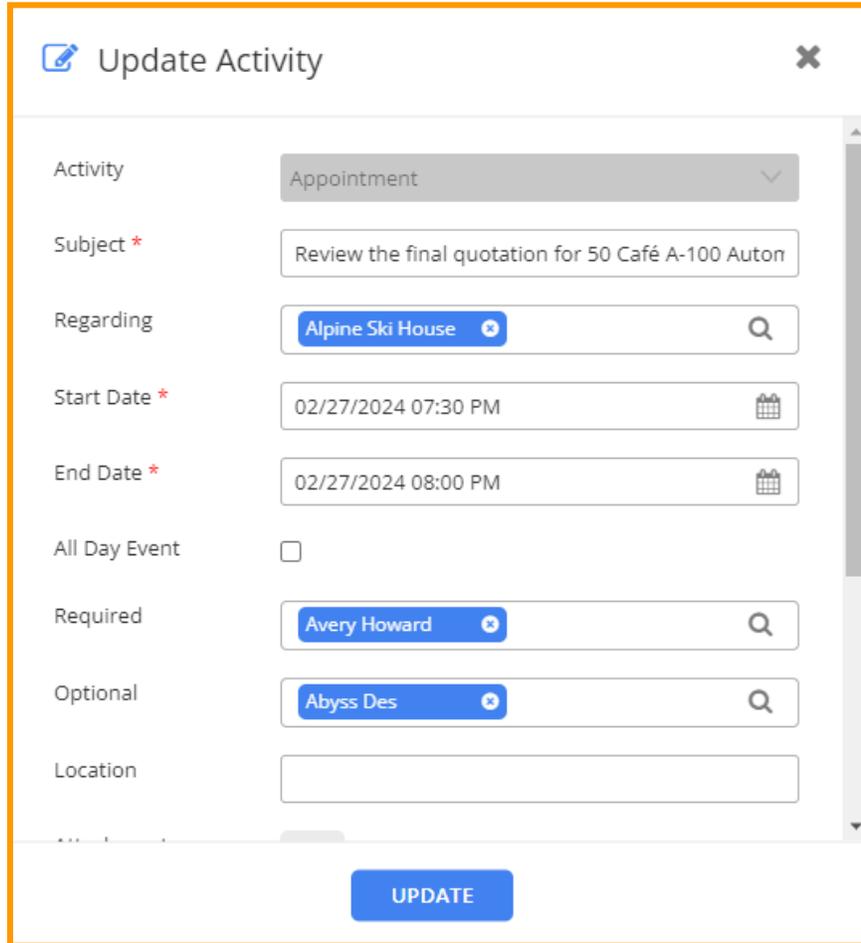
- By clicking on the 'Notes' icon, you can check the details of added notes for this activity.
- You can attach the file if required.

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

Edit Activity

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





Update Activity

Activity: Appointment

Subject *: Review the final quotation for 50 Café A-100 Auton

Regarding: Alpine Ski House

Start Date *: 02/27/2024 07:30 PM

End Date *: 02/27/2024 08:00 PM

All Day Event:

Required: Avery Howard

Optional: Abyss Des

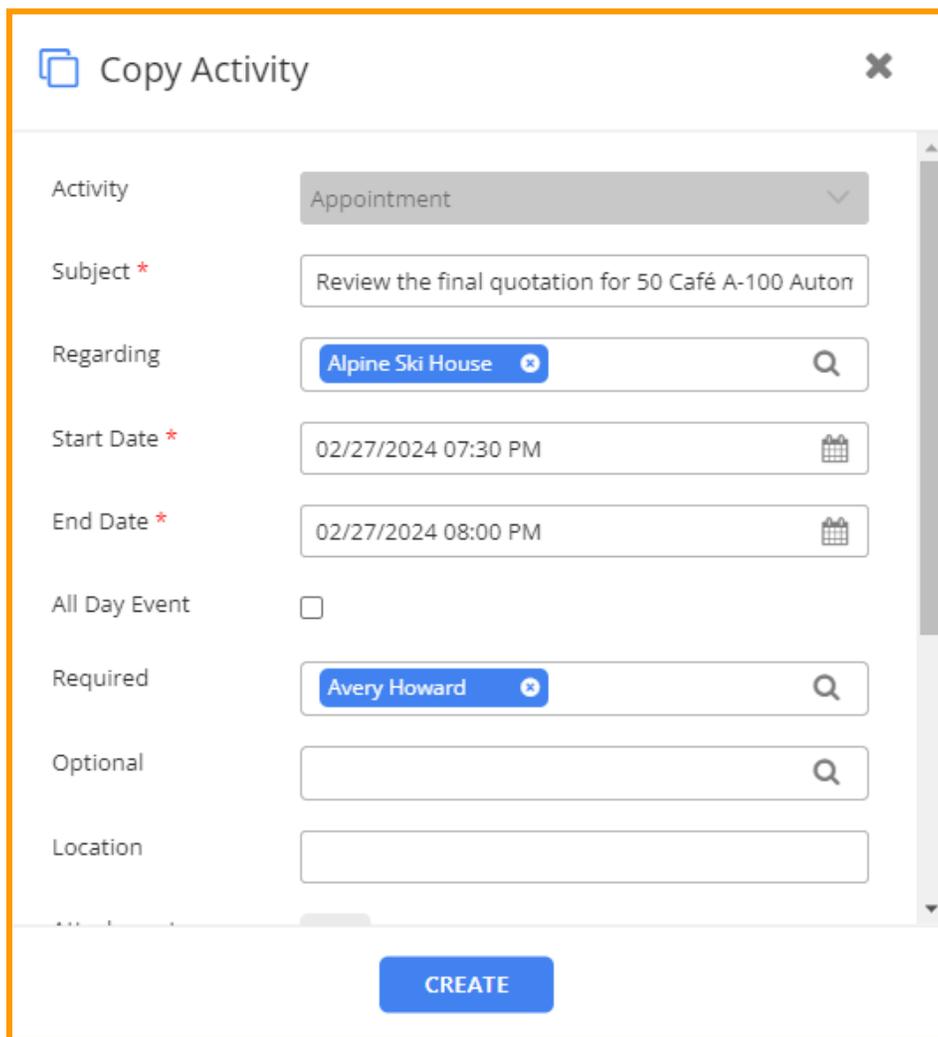
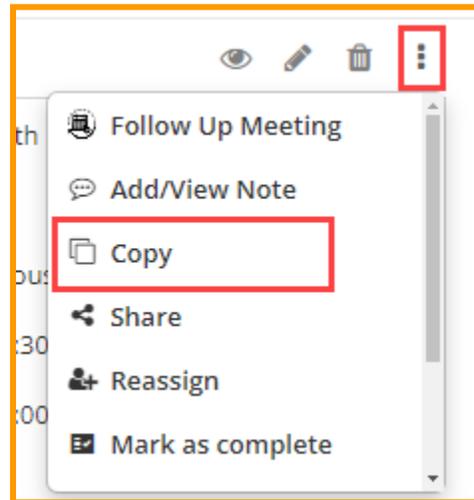
Location:

UPDATE

- 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.

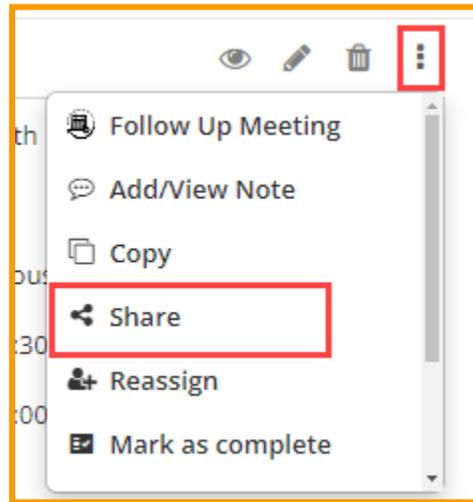


A screenshot of a 'Copy Activity' form. The form has a title bar with a copy icon and a close button. The fields are: Activity (Appointment), Subject (Review the final quotation for 50 Café A-100 Auton), Regarding (Alpine Ski House), Start Date (02/27/2024 07:30 PM), End Date (02/27/2024 08:00 PM), All Day Event (checkbox), Required (Avery Howard), Optional, and Location. A blue 'CREATE' button is at the bottom.

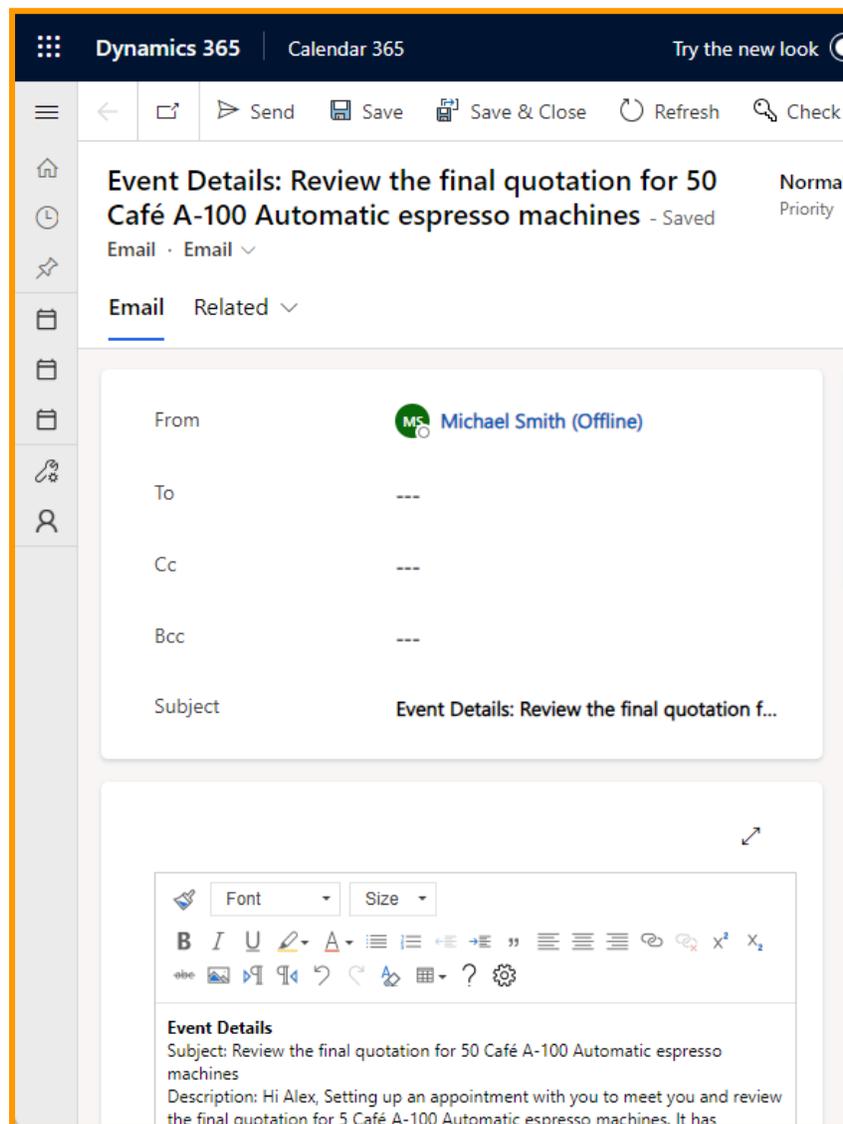
- Click on the **Create** button to complete the activity creation. If you don't edit and save it as it is, it would create a duplicate of the activity.

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.

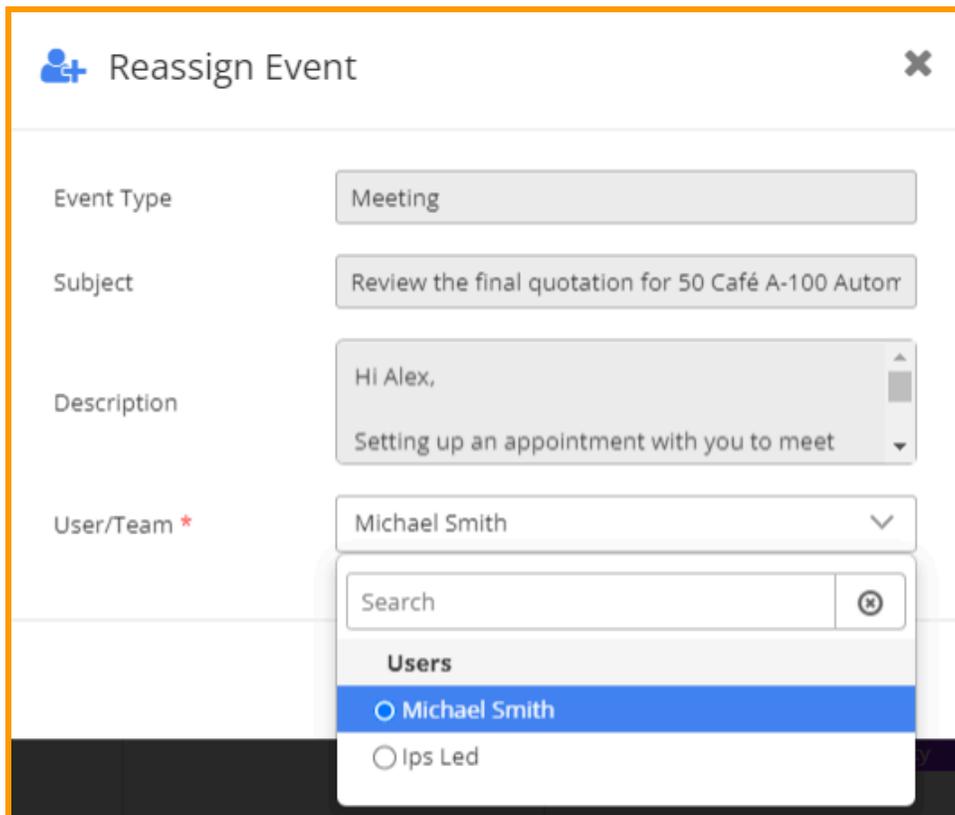
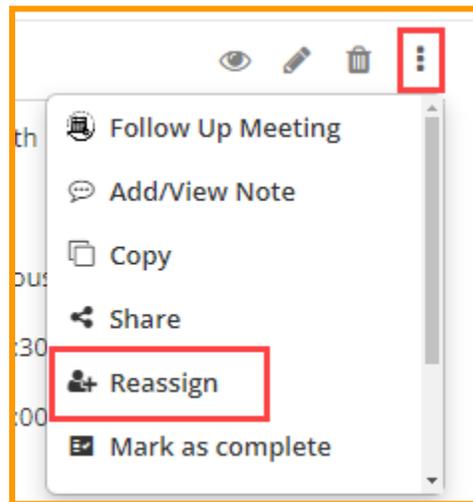


- Clicking on the icon, it redirects to the CRM page to email the activity details.



Re-assigning Activity

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

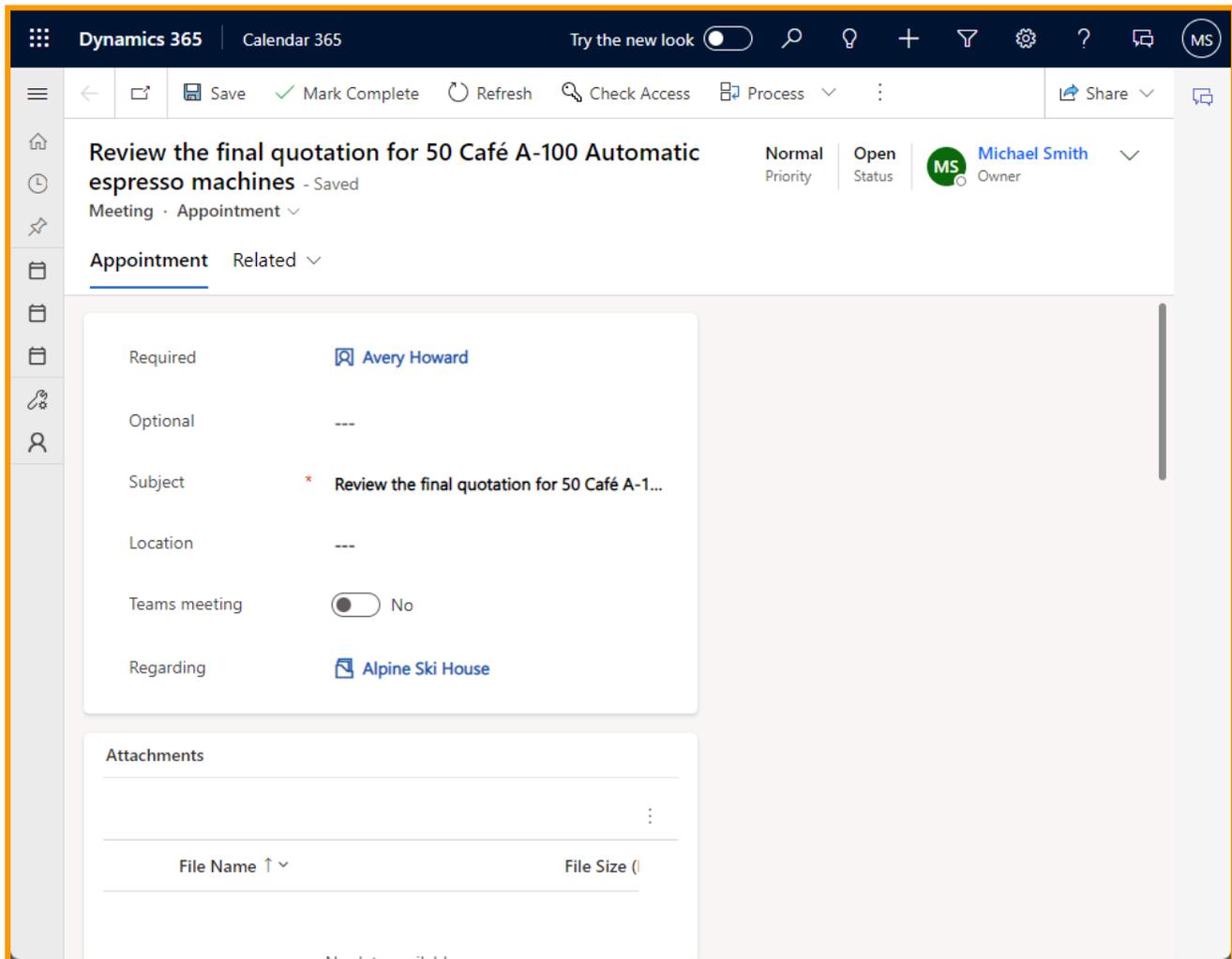


- Select the user or team from the look up records box to which the activity is to be reassigned.

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.



The screenshot shows the Dynamics 365 interface for a calendar appointment. The title is "Review the final quotation for 50 Café A-100 Automatic espresso machines". The appointment is owned by Michael Smith. The details card shows the following information:

- Required: Avery Howard
- Optional: ---
- Subject: * Review the final quotation for 50 Café A-1...
- Location: ---
- Teams meeting: No
- Regarding: Alpine Ski House

Below the details card is an Attachments section with a table header:

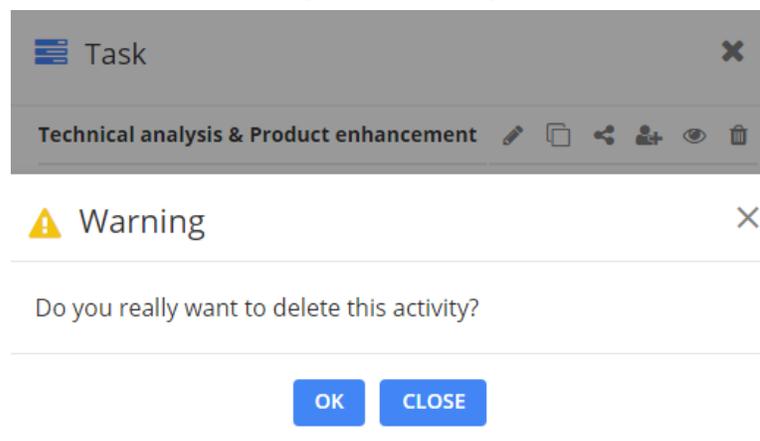
File Name ↑	File Size (l)
-------------	---------------

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.



The warning pop-up message is titled "Task" and contains the following text:

Technical analysis & Product enhancement

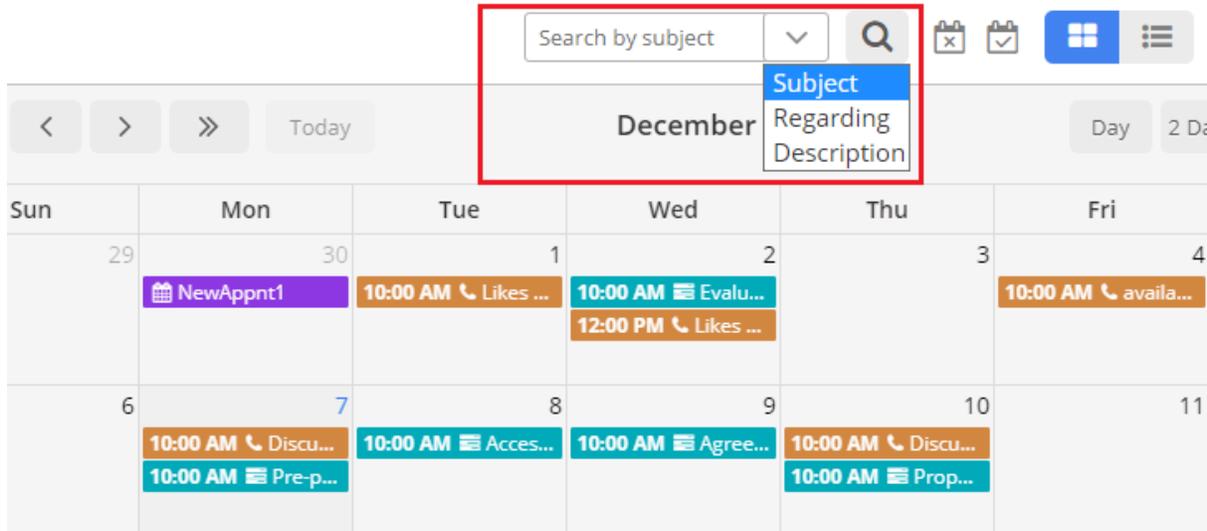
Warning

Do you really want to delete this activity?

Buttons: OK, CLOSE

Search Activity

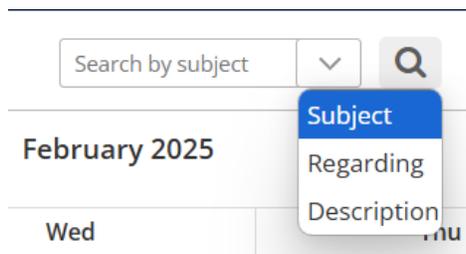
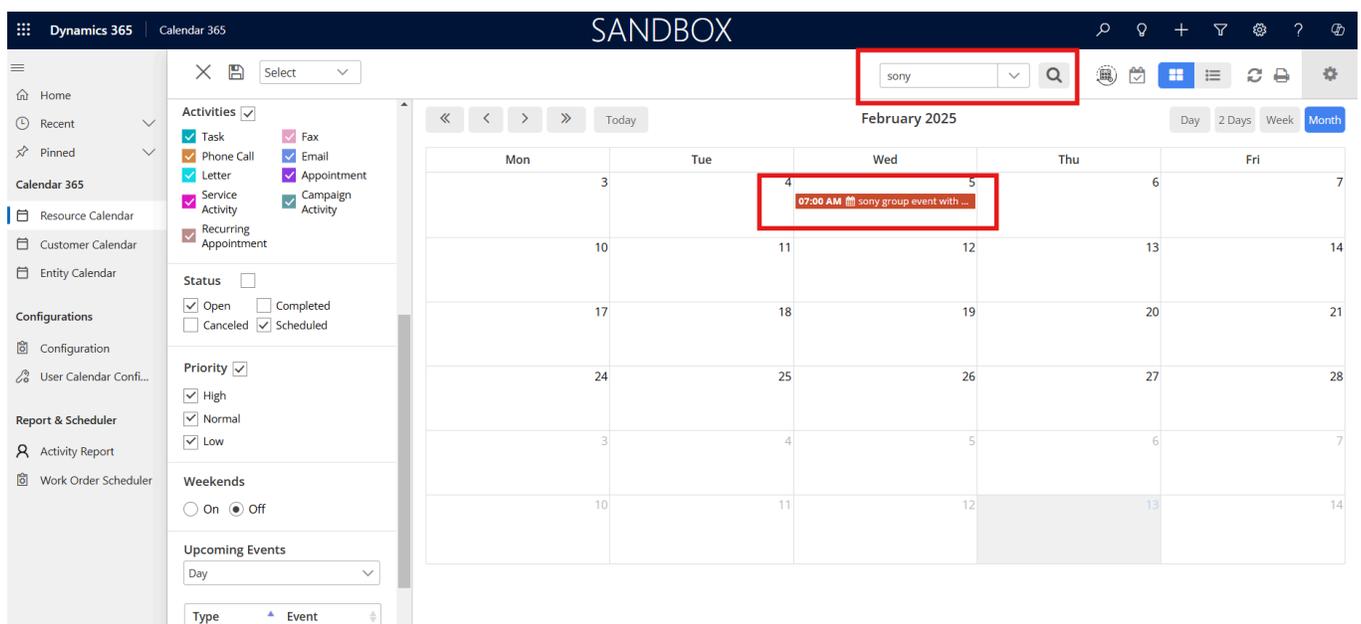
- You can search any activity by three options: **Subject**, **Regarding** and **Description** that are inserted in the activities.
- Select any search option among three and click on the search icon and it will show all activities with that keyword in the search text box.



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

Search For Entity Records

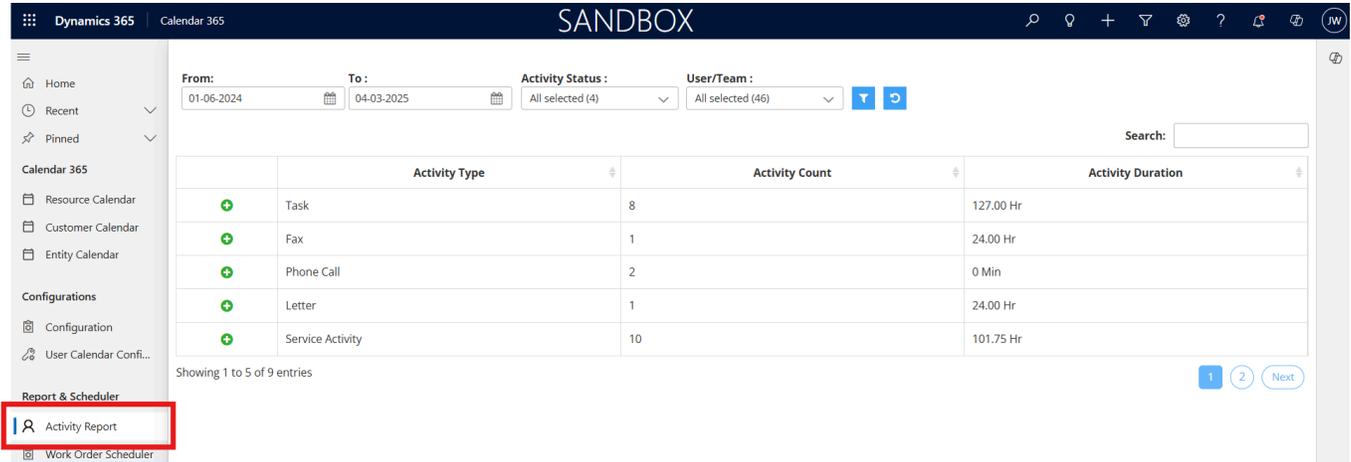
- You can search the entity records as you have enabled from the entity configuration in the “Search By Attribute” option.

The screenshot shows the Dynamics 365 interface in a "SANDBOX" environment. The top navigation bar includes "Dynamics 365" and "Calendar 365". On the left, there is a sidebar with navigation options like "Home", "Recent", "Pinned", "Calendar 365", "Resource Calendar", "Customer Calendar", "Entity Calendar", "Configurations", "Report & Scheduler", "Activity Report", and "Work Order Scheduler". The main area shows a calendar for February 2025. A search bar at the top right contains the text "sony" and a search icon. A red box highlights the search bar and the search results, which show a single event on Wednesday, February 4th, at 07:00 AM, titled "sony group event with ...".

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.

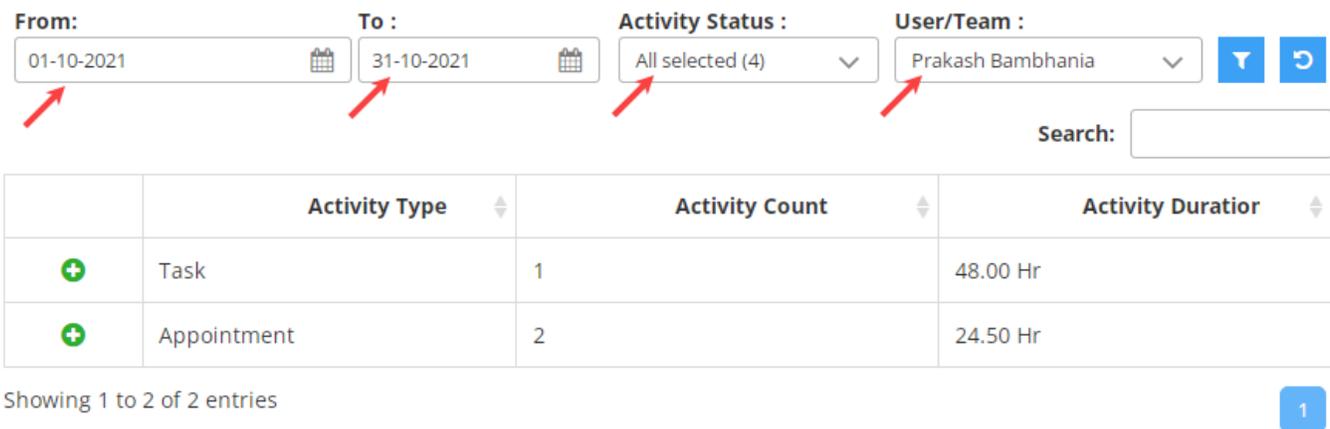


The screenshot shows the Dynamics 365 interface for the Activity Report. The top navigation bar includes 'Dynamics 365', 'Calendar 365', and 'SANDBOX'. The left sidebar contains navigation options like Home, Recent, Pinned, and Report & Scheduler. The 'Report & Scheduler' section is highlighted with a red box, and 'Activity Report' is selected. The main content area displays a table of activity data with filters for 'From' (01-06-2024), 'To' (04-03-2025), 'Activity Status' (All selected (4)), and 'User/Team' (All selected (46)).

	Activity Type	Activity Count	Activity Duration
+	Task	8	127.00 Hr
+	Fax	1	24.00 Hr
+	Phone Call	2	0 Min
+	Letter	1	24.00 Hr
+	Service Activity	10	101.75 Hr

Showing 1 to 5 of 9 entries

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



The screenshot shows the filtered Activity Report interface. The filters are: 'From' (01-10-2021), 'To' (31-10-2021), 'Activity Status' (All selected (4)), and 'User/Team' (Prakash Bambhania). Red arrows point to these filter fields. The table below shows the filtered results.

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

Showing 1 to 2 of 2 entries

- 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**.

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

Activity Type  **Activity Duration** 

No records found

- Select all
- Open
- Completed
- Canceled
- Scheduled

Search:

- 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.

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

Showing 1 to 2 of 2 entries

1

- 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: 
To : 
Activity Status : 
User/Team : 
 

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
Appointment 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

Showing 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

+ Create Activity
×

Activity

Subject *

Regarding

Required

Optional

Location

Set Recurrence

Priority

CREATE

- 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.

↻ Set Recurrence
×

Appointment Time

Start

End

Recurrence Pattern Weekly ▾

Recur Every Week(s) On:

Sunday
 Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday

Range of Recurrence

Start range

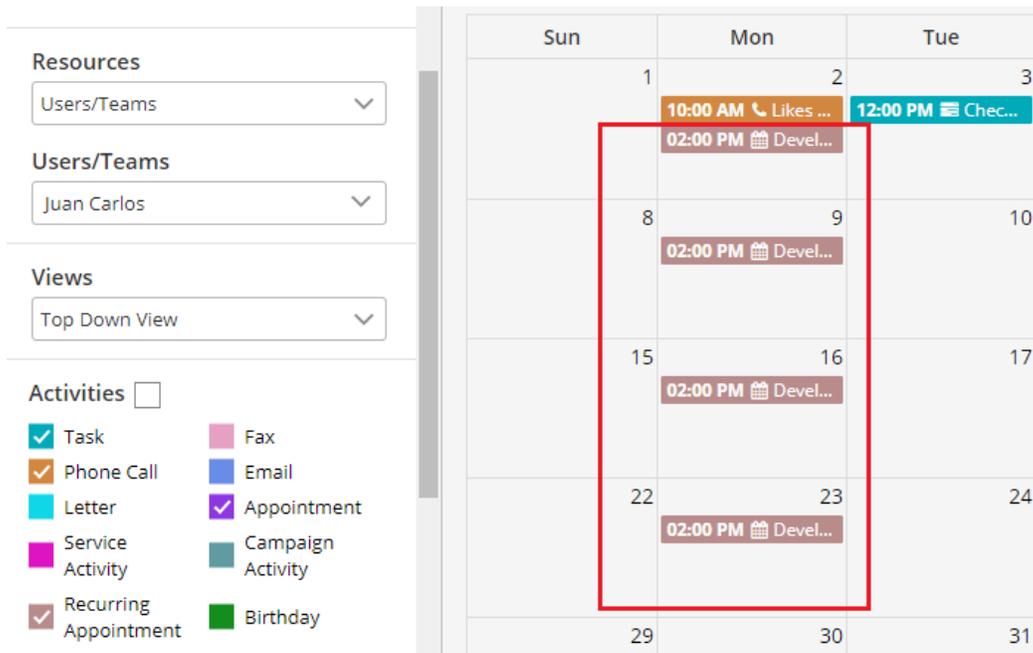
End range

No End Date
 End after occurrences
 End by

Set
Cancel

- Insert the details as below:

- o **Appointment Time:** Select Start/End Time
- o **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.
- o **Range of Recurrence:**
 - **Start Range:** Select starting date
 - **End Range:** 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.



The screenshot displays a calendar interface with a sidebar on the left and a calendar grid on the right. The sidebar includes the following sections:

- Resources:** A dropdown menu showing "Users/Teams".
- Users/Teams:** A dropdown menu showing "Juan Carlos".
- Views:** A dropdown menu showing "Top Down View".
- Activities:** A list of activity types with checkboxes:
 - Task
 - Phone Call
 - Letter
 - Service Activity
 - Recurring Appointment
 - Fax
 - Email
 - Appointment
 - Campaign Activity
 - Birthday

The calendar grid shows a weekly view from Sunday to Tuesday. A red rectangular box highlights a recurring appointment series. The appointments are scheduled for every Monday and Tuesday at 02:00 PM. The first appointment is on Monday, 1st, and the last is on Tuesday, 23rd. The appointment title is "Devel...".

- 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.

Create Activity ✕

Activity: Appointment

Subject *: Appointment with Client

Regarding: Fabrikam, Inc.

Start Date *: 07-12-2018 12:00 AM

End Date *: 07-13-2018 12:00 AM

Required: Maria Campbell, Nancy Anderson

Optional: Counts Vong (samp...), Debra Garcia (sam...)

Location: Client's Place

OK

- 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'.

Activities Configuration

Activities Redirection: Pop-up View

Overdue Activities:

Activity Visibility:

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.

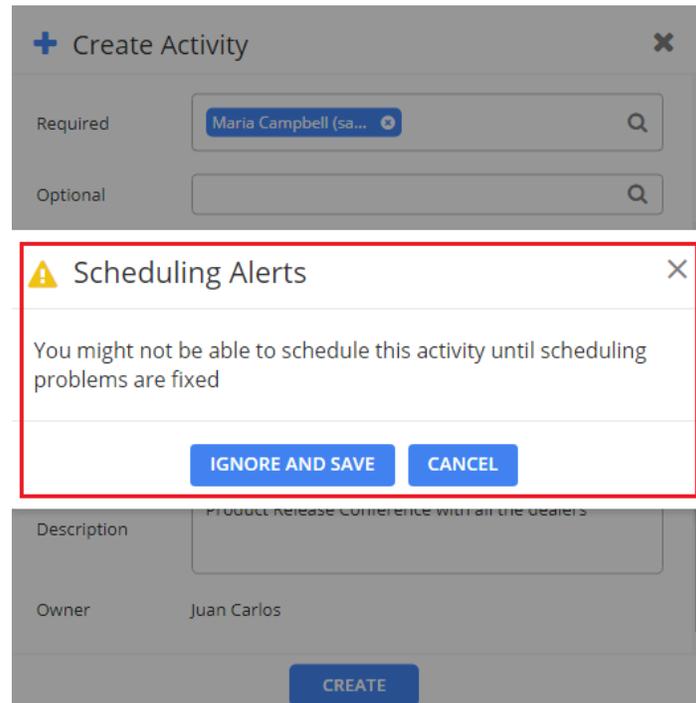
Navigation: << < > >> Today

Month: January 2020

Sun	Mon	Tue	Wed	Thu
29	30	31 12:00 AM 🎂 Birthday! 	1	2
5	6	7 12:00 AM 📅 Marketing 	8	9 12:00 AM 🛠️ Update Ge 
12 05:00 PM 🛠️ AC Repair 	13	14 10:00 AM 📅 HR manag...	15	16 09:00 AM 📊 Excel Data ... 01:00 PM 📄 Technical a...

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.



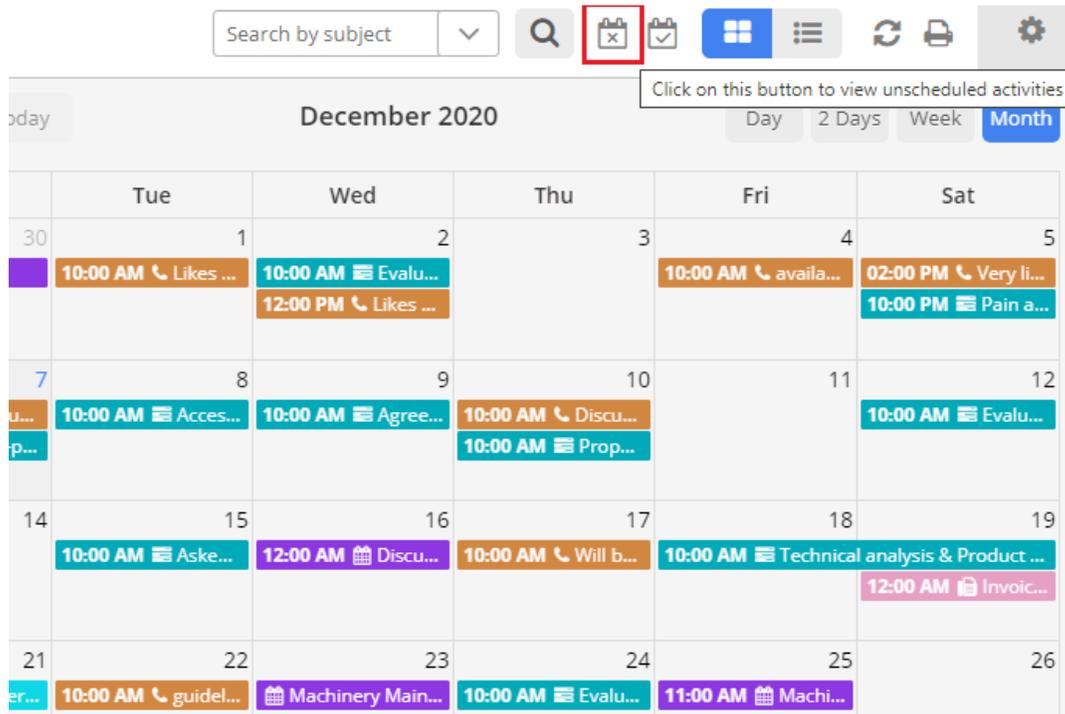
- On clicking the **Ignore and Save** button, activity gets saved but with conflicting error messages on the activity. Clicking the **Cancel** button, scheduling gets canceled and you again get to reschedule the date and time of the activity.

15	16	17
05:59 PM 📅 Week...	12:00 AM ⓘ ⚙️ Se... 12:00 AM ⓘ ⚙️ Se...	
22	23	24
05:59 PM 📅 Week...		

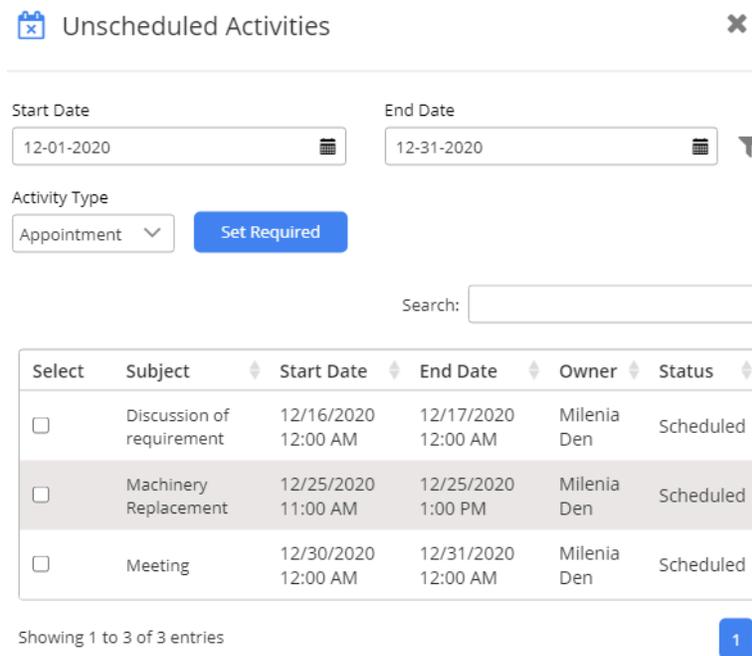
Note: You get scheduling alerts for all the activities except Custom activity. And it works only if conflict management is enabled from the configuration page.

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.

 Set required for appointments ✕

Required *

- 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.

 Unscheduled Activities ✕

Start Date End Date

Activity Type

Search:

Select	Subject	Start Date	End Date	Owner	Status
<input checked="" type="checkbox"/>	AC Services	11/21/2019 1:00 PM	11/21/2019 3:00 PM	Juan Carlos	Scheduled

Showing 1 to 1 of 1 entries 1 row selected

- 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.

 Set resource for service activities ✕

Resource *

Print Calendar

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

Search by subject [v] [Q] [x] [v] [Windows] [Menu] [Refresh] [Print] [Settings]

>> Today **December 2020** Day 2 Days Week **Month**

Mon	Tue	Wed	Thu	Fri	Sat
30 NewApnt1	1 10:00 AM Likes ...	2 10:00 AM Evalu... 12:00 PM Likes ...	3	4 10:00 AM availa...	5 02:00 PM Very li... 10:00 PM Pain a...
7 10:00 AM Discu... 10:00 AM Pre-p...	8 10:00 AM Acces...	9 10:00 AM Agree...	10 10:00 AM Discu... 10:00 AM Prop...	11	12 10:00 AM Evalu...

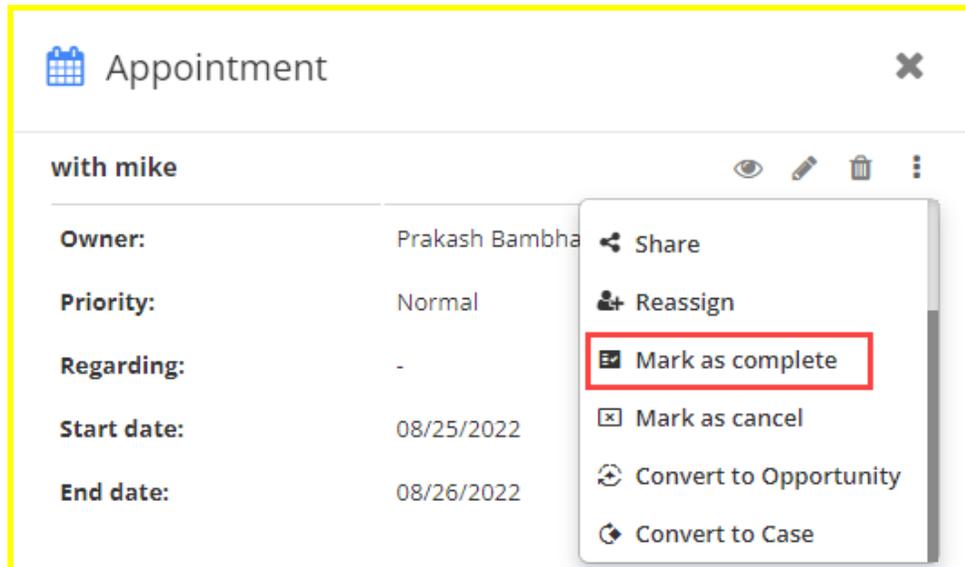
- You can print the calendar in Portrait view as well as Landscape view in different formats like PDF, XPS Document Writer, directly fax it and save to Google Drive.

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.

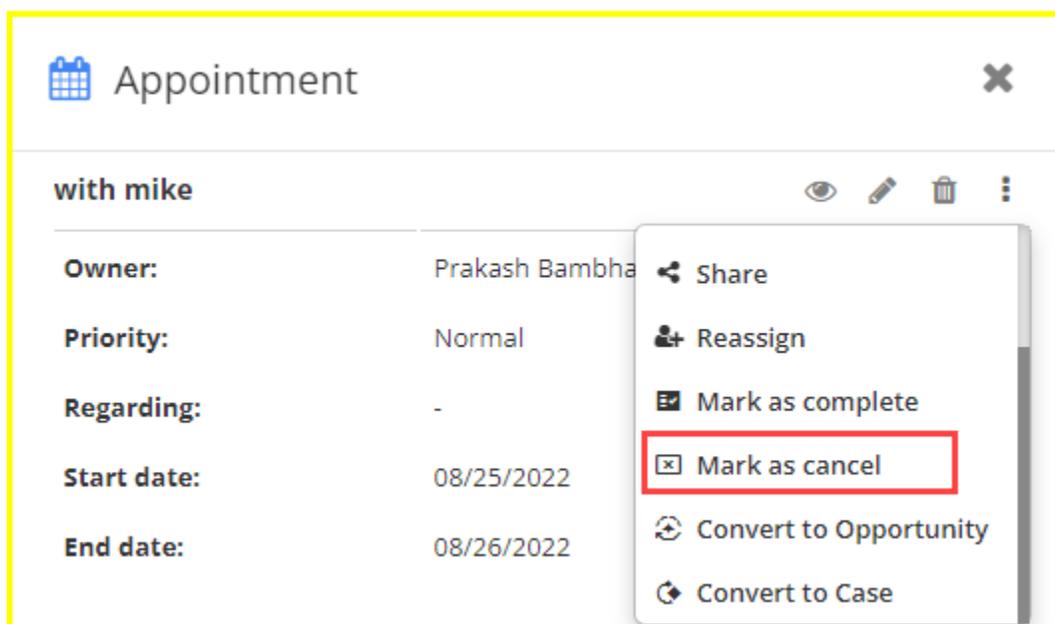
Mark as Complete

- 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 to Opportunity ✕

Customer * 

Currency * 

Related Campaign 

Open the new opportunity Yes No

Change the status to completed and close the form Yes No

Record a closed campaign response Yes No

Convert Activity to Case

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

Convert to Case ✕

Customer * 

Subject 

Open the new case Yes No

Change the status to completed and close the form Yes No

Convert Activity to Lead

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

 Convert to Lead ✕

First Name:

Last Name:*

Company:

Email Address:

Open the new Lead: Yes No

End Series

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

 Recurring Appointment ✕

Support 👁️ ✎ 🗑️ ⋮

End Time: 8/12/2022 11:32 AM

Owner: Prakash Bambhania

Priority: Normal

Regarding: -

Start Time: 8/12/2022 11:02 AM

- 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”.

End Series



Select when you want the appointment series to end

- This event
- Following events from selected date

What would you like to do with the appointment?

- Complete
- Cancel

SAVE

CLOSE

- 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.

End Series



Select when you want the appointment series to end

- This event
- Following events from selected date

Selecting this will delete all future appointments in the series

Series End Date

11-18-2019



What would you like to do with the past appointments that are open?

- Complete
- Cancel

SAVE

CLOSE

Deactivate Bookable Resource Booking

Bookable Resource Booking ✕

Resource_A1107



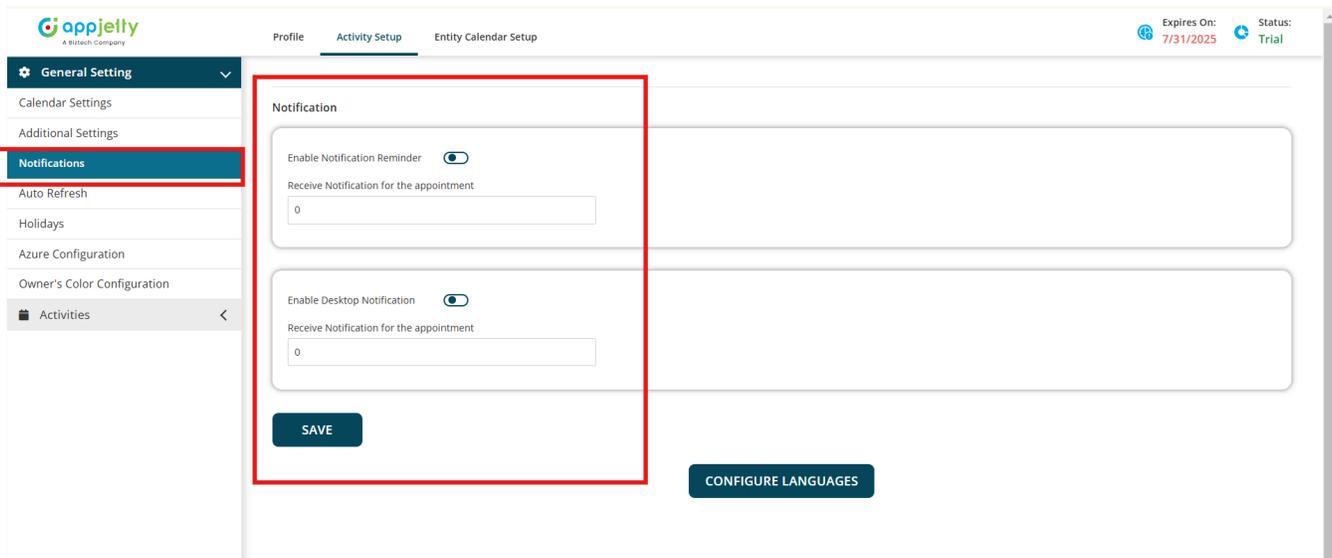
Duration:	1 hour
Modified By:	Jhonson Nick
Modified On:	1/16/2020 3:07 PM
Owner:	Jhonson Nick
Project:	-
Resource:	Abraham McCormick
Start Time:	1/16/2020 10:00 AM
Status:	Active
Status Reason:	Active

DEACTIVATE

- 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.



The screenshot shows the 'Activity Setup' page in the appjetty interface. The 'Notifications' section is highlighted with a red box. It contains two notification settings, each with an 'Enable' toggle and a 'Receive Notification for the appointment' input field set to '0'. A 'SAVE' button is located at the bottom of the notification settings. The top right of the page shows 'Expires On: 7/31/2025' and 'Status: Trial'. A 'CONFIGURE LANGUAGES' button is visible at the bottom right.

 Reminder



Event Type: Task

Event: Technical analysis & Product enhancement

Start Date: 11/19/2019 3:10 PM

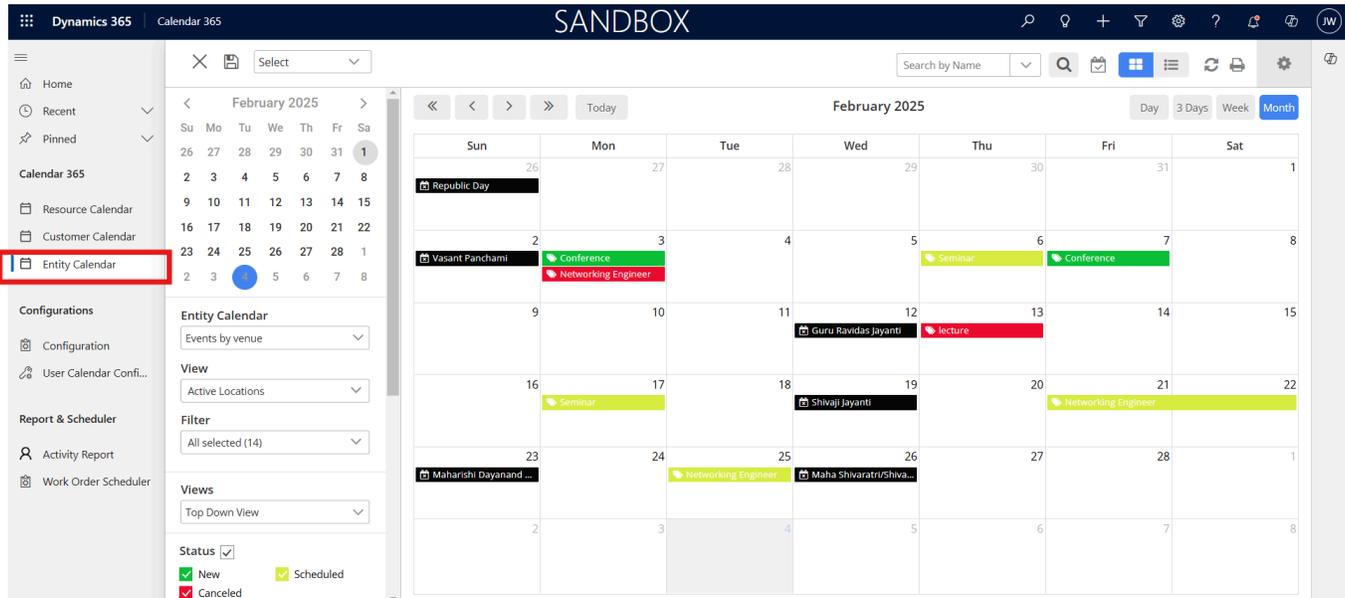
End Date: 11/19/2019 8:10 PM

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.



The screenshot shows the Dynamics 365 Entity Calendar interface. The left sidebar contains navigation options: Home, Recent, Pinned, Calendar 365 (with sub-items: Resource Calendar, Customer Calendar, and Entity Calendar, which is highlighted with a red box), Configurations, Report & Scheduler, and Activity Report. The main area displays a calendar for February 2025 with various events like 'Republic Day', 'Vasant Panchami', 'Guru Ravidas Jayanti', 'Shivaji Jayanti', and 'Maharishi Dayanand...' scheduled. A 'Create Record' popup is visible on the date February 25th.

- 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).

Custom Customization

Form Attribute

All selected (2) ▼

Filter By

Created By ▼

SAVE

+ Create Record



Account Name *	<input type="text" value="Jordan"/>
Account Number	<input type="text" value="12435"/>
Category	<input type="text" value="Preferred Customer"/>
Description	<input type="text" value="Needs Support"/>
Email	<input type="text" value=""/>
Industry	<input type="text" value="Accounting"/>
Main Phone	<input type="text" value=""/>
Number of Employees	<input type="text" value="50"/>

CREATE

- **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.

Email

Industry

Main Phone

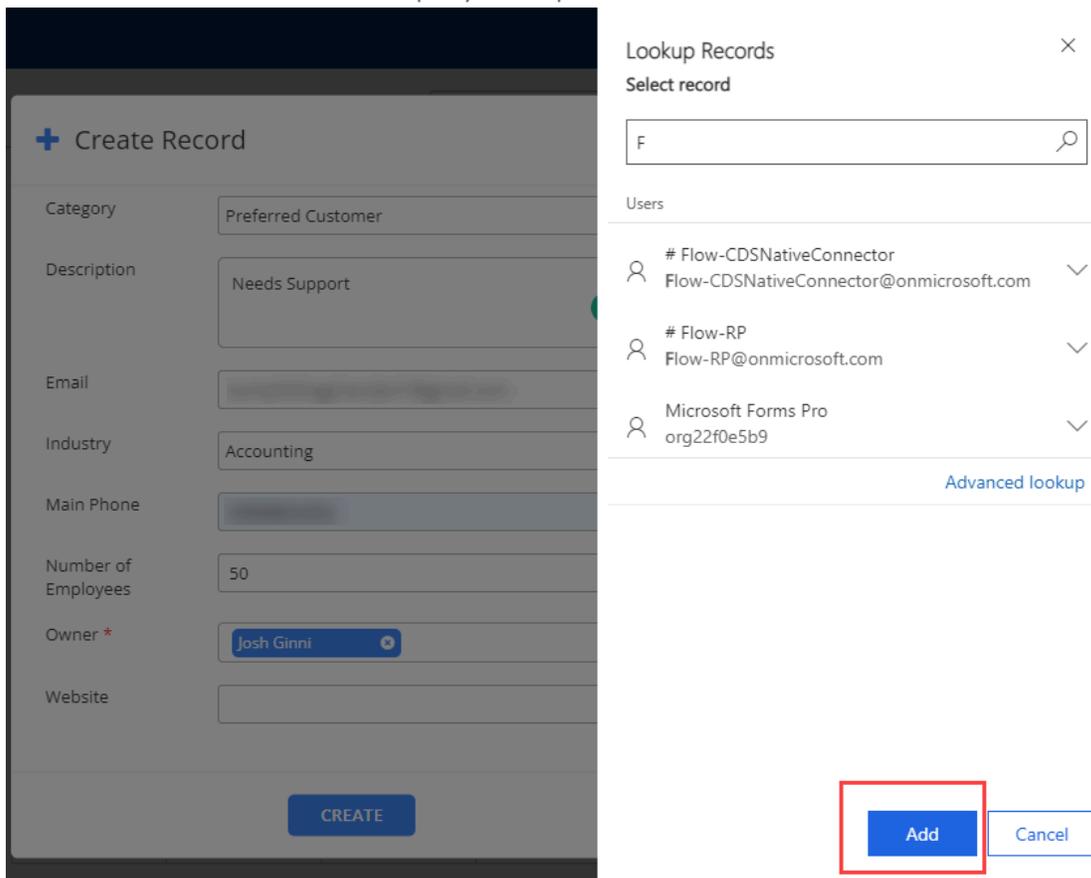
Number of Employees

Owner *

Website

CREATE

- **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.



+ Create Record

Category Preferred Customer

Description Needs Support

Email

Industry Accounting

Main Phone

Number of Employees 50

Owner * Josh Ginni

Website

CREATE

Lookup Records

Select record

Users

- # Flow-CDSNativeConnector
Flow-CDSNativeConnector@onmicrosoft.com
- # Flow-RP
Flow-RP@onmicrosoft.com
- Microsoft Forms Pro
org22f0e5b9

Advanced lookup

Add Cancel

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

Choose users



User Lookup View (default) ▾

Only my records

	Full Name ↑ ▾	Position ▾	Main ... ▾	Business Unit ▾	Site ▾	Title ▾	Primary Email ▾
<input type="radio"/>	# Flow-CDSNativeConnector			org22f0e5b9			Flow-CDSNativeConnector...
<input type="radio"/>	# Flow-RP			org22f0e5b9			Flow-RP@onmicrosoft.com
<input type="radio"/>	Microsoft Forms Pro			org22f0e5b9			enterprisesurveyappuser@c...

Selected record

Done

Cancel

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

Number of Employees

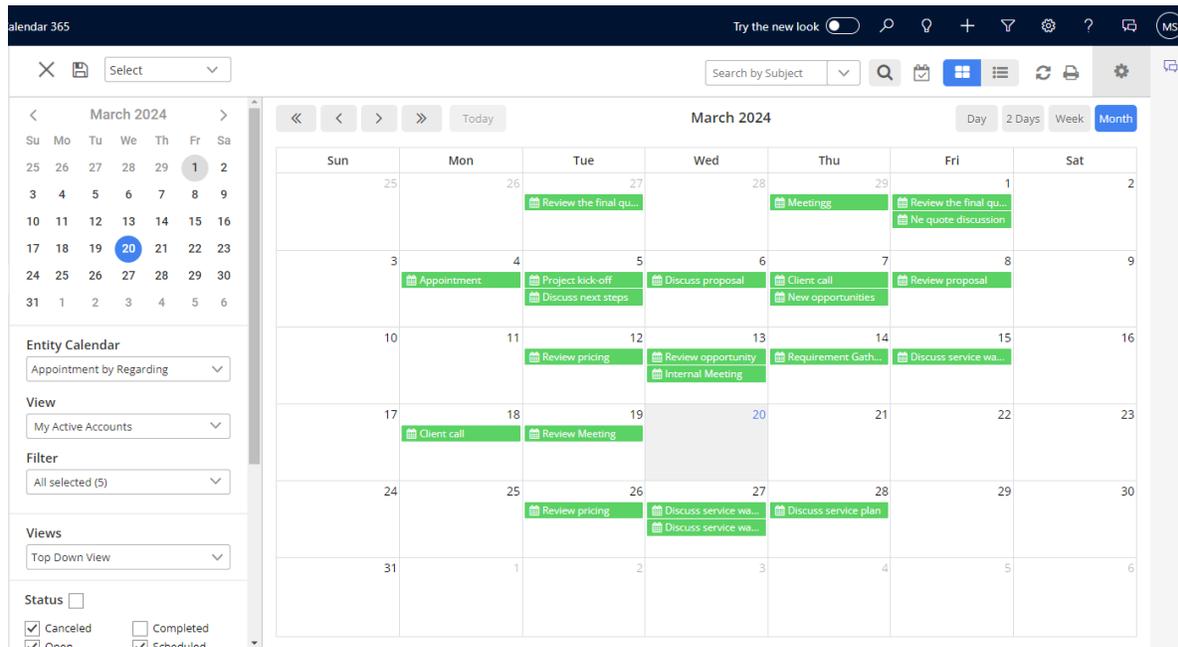
Owner *



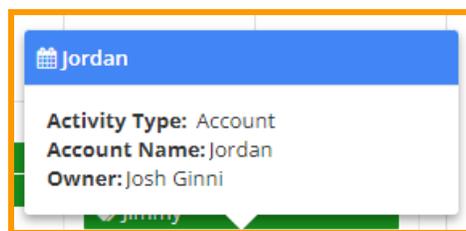
Website

CREATE

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

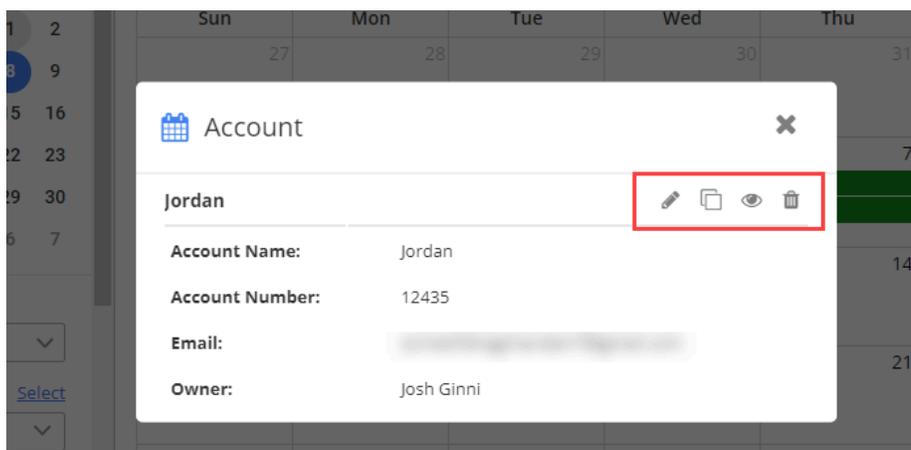


- Now you can view the added record on the calendar.



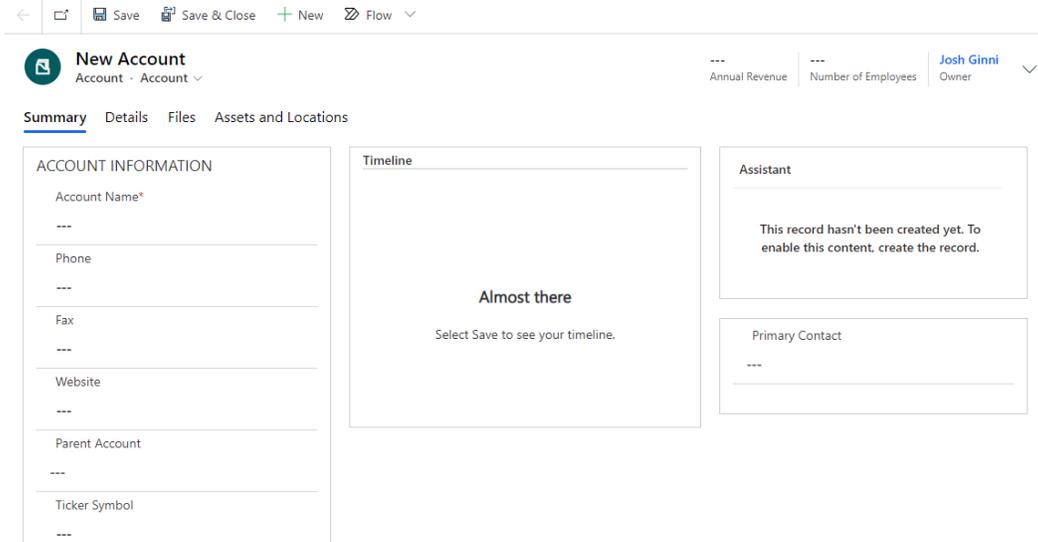
- You can also view the detail of the created record by hovering the mouse over the record. You can also change the field in the detail view as per your requirement from the calendar configuration.

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.



The screenshot shows the 'New Account' form in a CRM system. At the top, there is a navigation bar with icons for back, save, save & close, new, and flow. The main header displays 'New Account' with a dropdown menu, and on the right, there are fields for 'Annual Revenue', 'Number of Employees', and 'Owner' (Josh Ginni). Below the header, there are tabs for 'Summary', 'Details', 'Files', and 'Assets and Locations'. The 'Summary' tab is active, showing a form with several input fields: 'Account Name*' (with a red asterisk), 'Phone', 'Fax', 'Website', 'Parent Account', and 'Ticker Symbol'. Each field has a placeholder '---'. To the right of the form is a 'Timeline' section with the text 'Almost there' and 'Select Save to see your timeline.' Below the timeline are two sections: 'Assistant' and 'Primary Contact', both with placeholder text 'This record hasn't been created yet. To enable this content, create the record.' and '---' respectively.

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

Edit Record

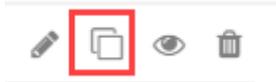
- Click on 'Edit'  icon to edit any created activity.



- 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.



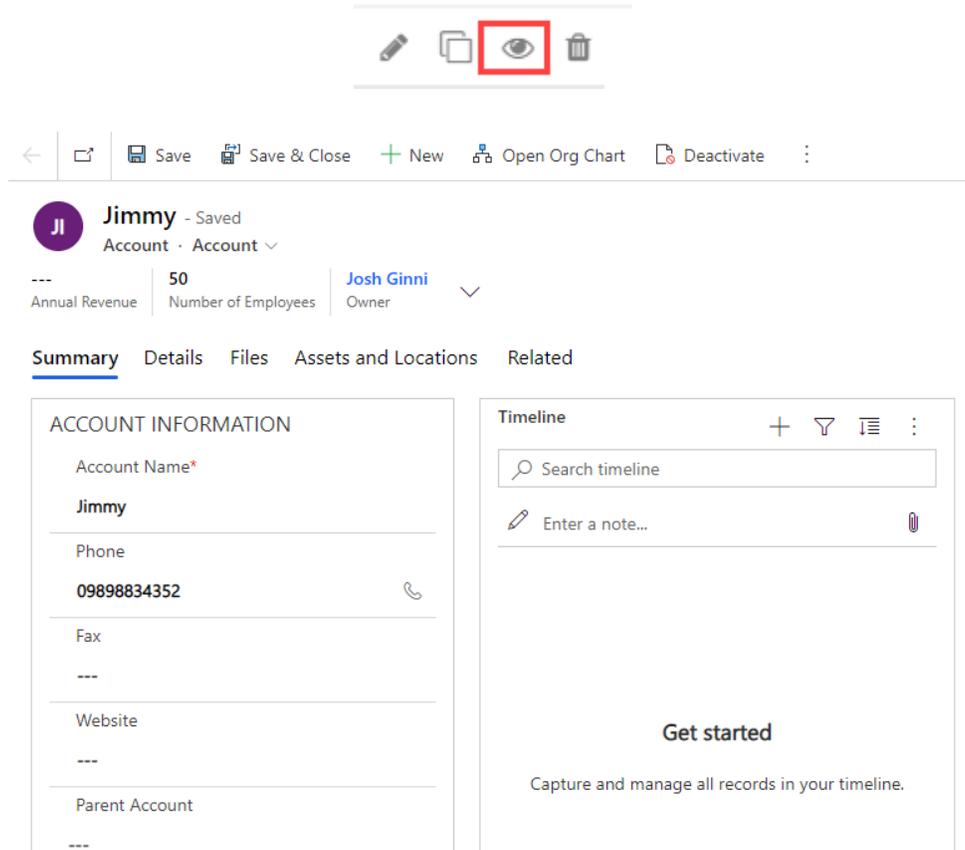
Copy Record ✕

Account Name *	<input type="text" value="jimmy"/>
Account Number	<input type="text" value="12345"/>
Category	<input type="text" value="Standard"/> ▼
Description	<input type="text" value="Need support"/>
Email	<input type="text" value=""/>
Industry	<input type="text" value="Accounting"/> ▼
Main Phone	<input type="text" value=""/>
Number of Employees	<input type="text" value="50"/>

- 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.



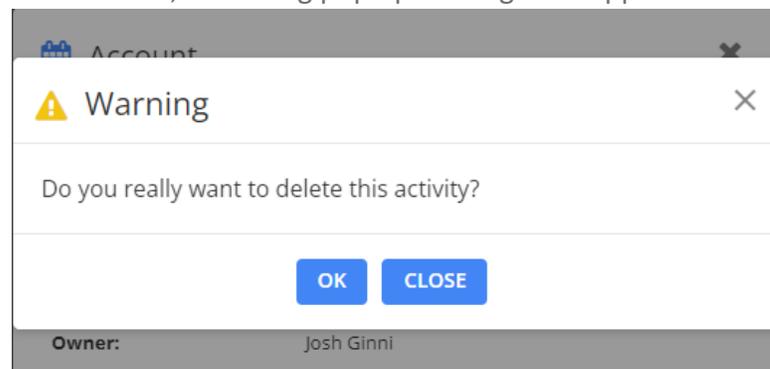
The screenshot shows the CRM interface for a record named 'Jimmy'. At the top, there is a toolbar with icons for edit, copy, view (highlighted with a red box), and delete. Below the toolbar is a navigation bar with options: Save, Save & Close, New, Open Org Chart, and Deactivate. The record details are displayed in a card format. The 'ACCOUNT INFORMATION' section includes fields for Account Name* (Jimmy), Phone (09898834352), Fax, Website, and Parent Account. The 'Timeline' section has a search bar, a note entry field, and a 'Get started' prompt: 'Capture and manage all records in your timeline.'

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.

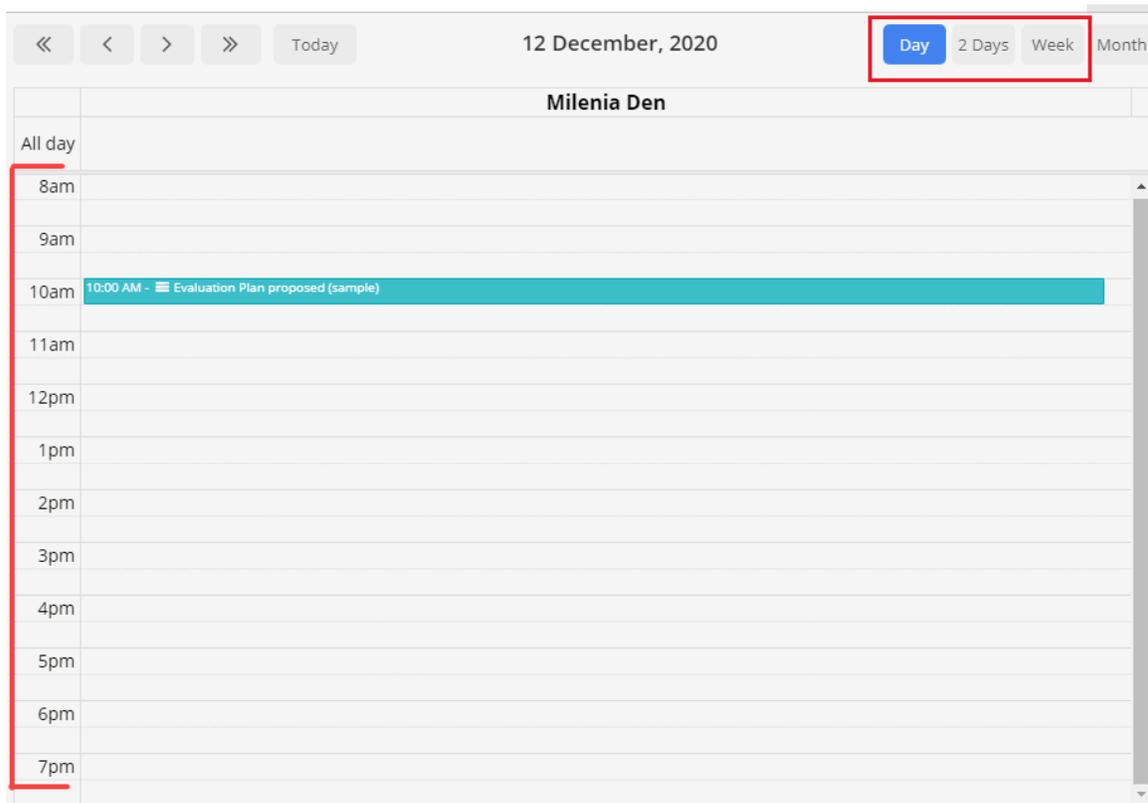
Time Slot Duration View

- 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.

Time Allotment Configuration

Slot Duration	Minimum Duration	Maximum Duration
30 Minutes	08	20

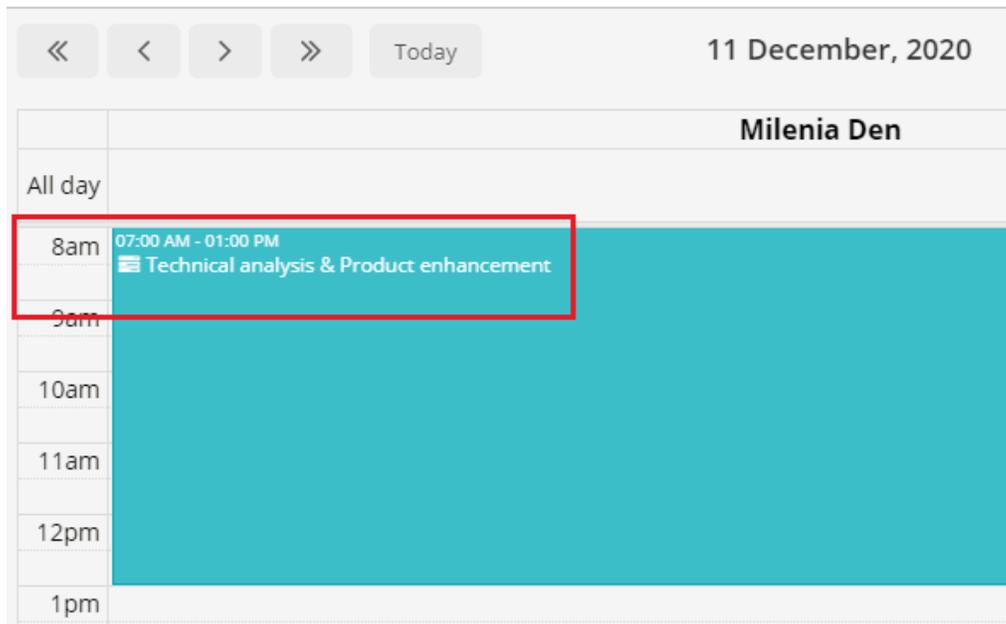
- The Time slot duration can only be seen for Days & Weeks. By setting the time slots, you can decide the availability and working time for any activity.



The screenshot shows a calendar interface for 12 December, 2020. The view is set to 'Day'. A red box highlights the view selection buttons: 'Day', '2 Days', and 'Week'. The calendar shows a time slot from 10:00 AM to 11:00 AM with the title 'Evaluation Plan proposed (sample)'. The time slots are listed from 8am to 7pm.

- 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 .

Search by subject



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

Resources
Users/Teams

Users/Teams
Juan Carlos

Views

- Top Down View
- Top Down View
- Gantt View
- Timeline View
- Agenda View

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

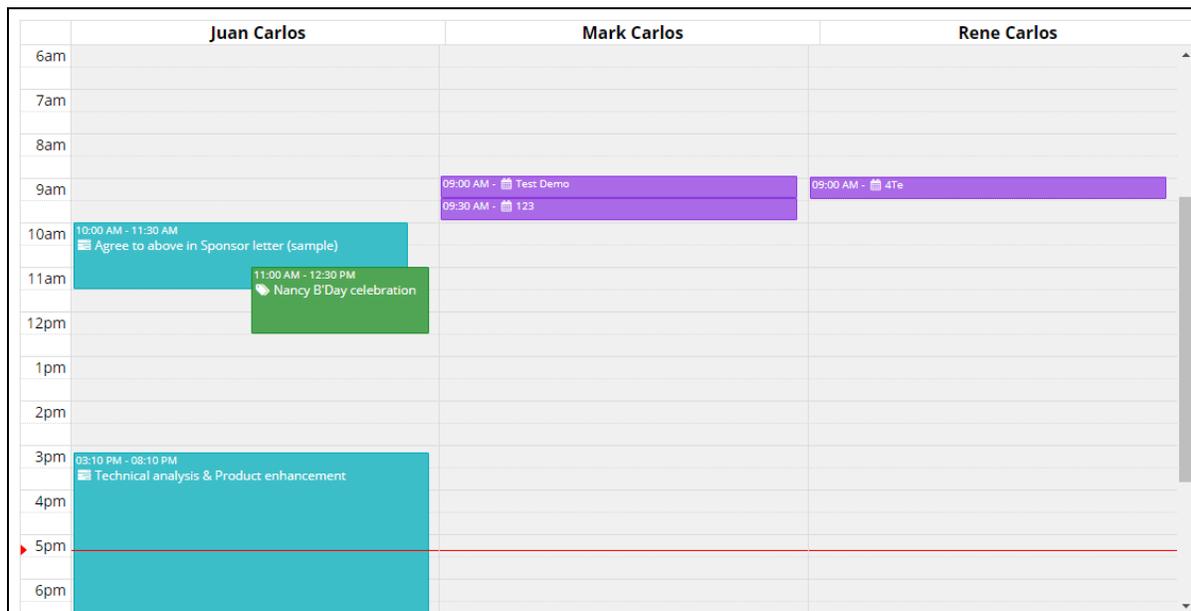
Note: You can check all Calendar Views in Resource Calendar and Customer Calendars individually.

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.



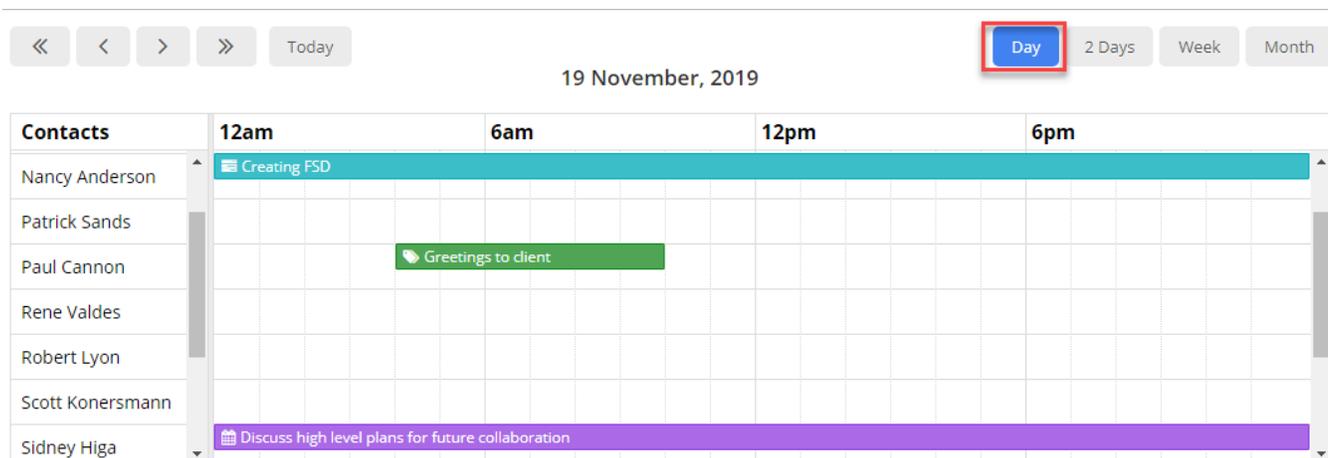
- Similarly, in Month View, you will see the details month wise with the dates.

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.

	Yvonne McKay (sample)		Susanna Stubberod (sample)		Nancy Anderson (sample)		Maria Campbell
	Tue	Wed	Tue	Wed	Tue	Wed	Tue
6am							
7am							
8am							
9am							
10am							
11am							
12pm							
1pm							
2pm							
3pm							
4pm							
5pm							

10:00 AM - 11:00 AM
Price Proposal

11:00 AM - 12:30 PM
Nancy B'Day celebration

Week View

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

17 - 23 November, 2019

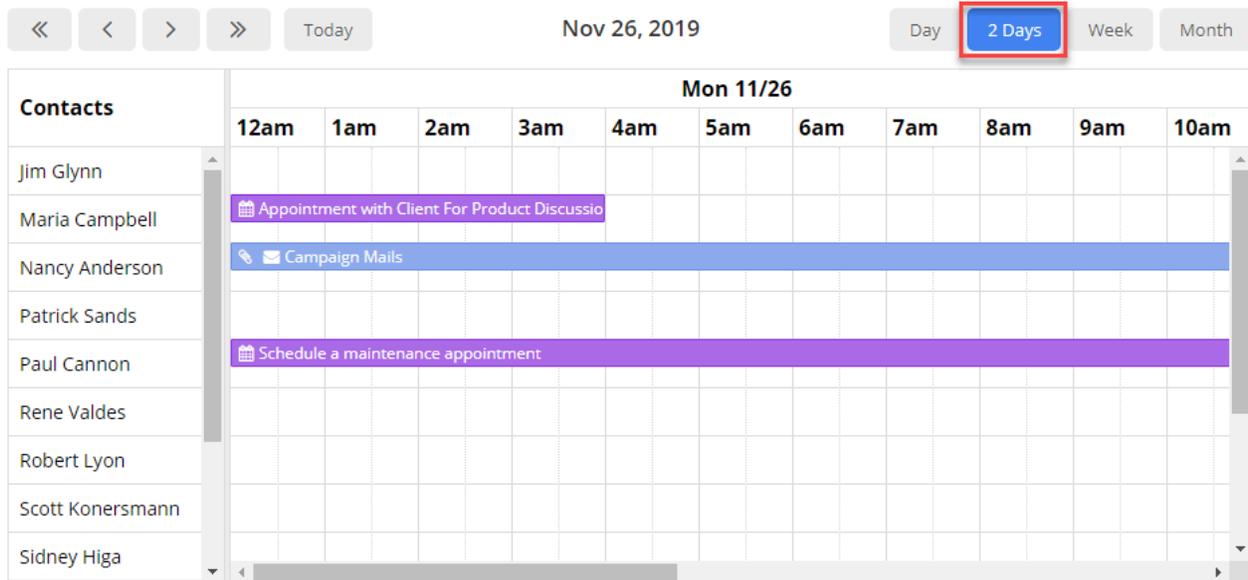
Users/Teams	Sun 11/17	Mon 11/18	Tue 11/19	Wed 11/20	Thu 11/21	Fri 11/22	Sat 11/23
Juan Carlos		09:30 AM Will be org 10:00 AM Access to	10:00 AM Agree to a 03:10 PM Technical	10:00 AM Proposal			
Mark Carlos		10:00 AM Asked for	10:00 AM Evaluation				
Rene Carlos							

Month View

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

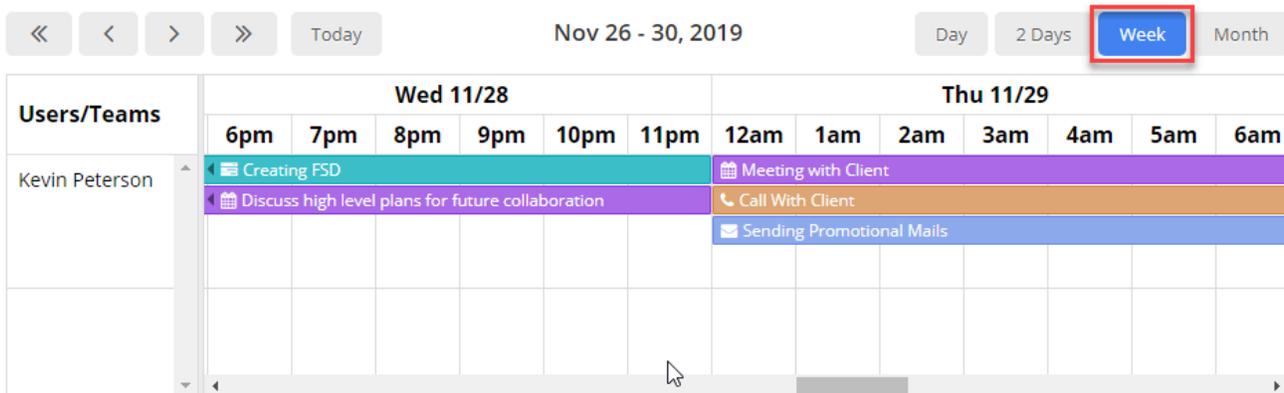
Day Span View

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



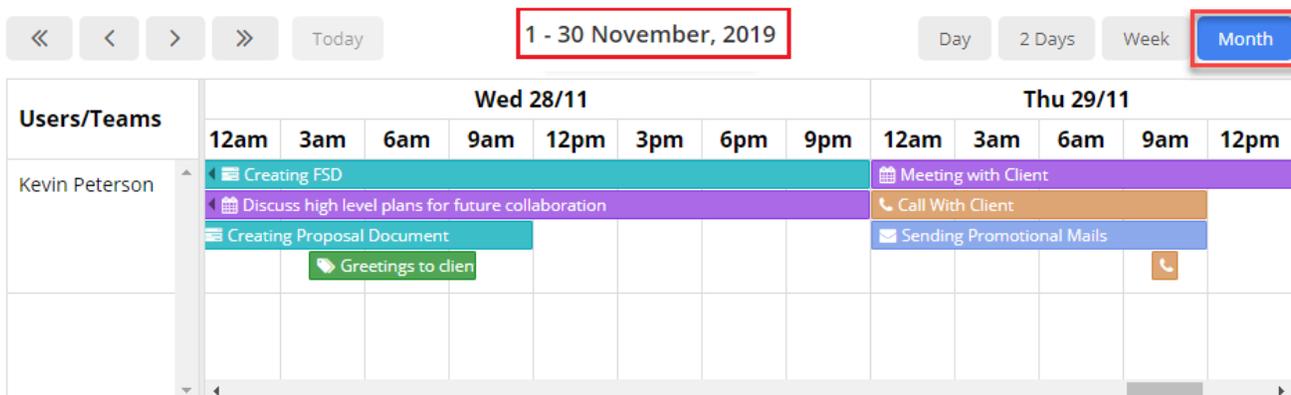
Week View

- 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.

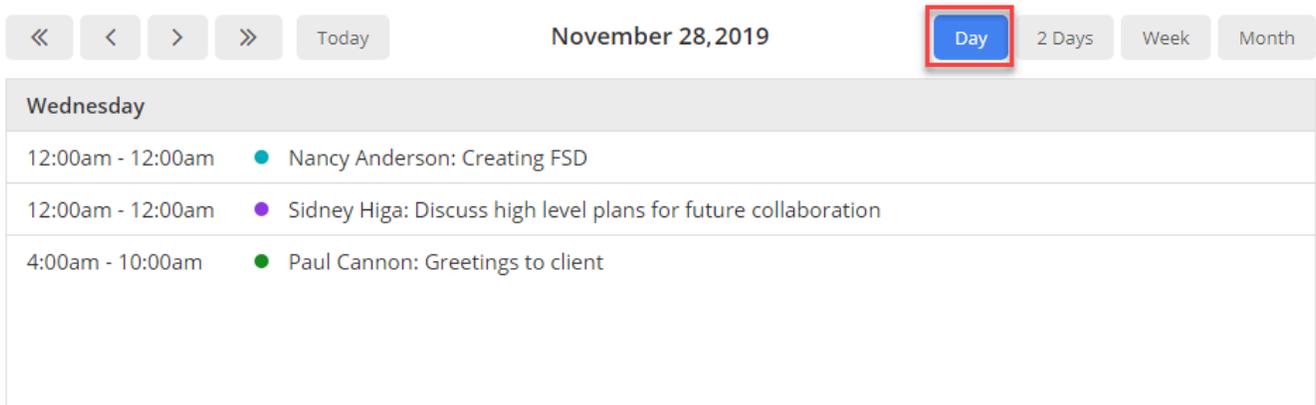


Agenda View

- 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.

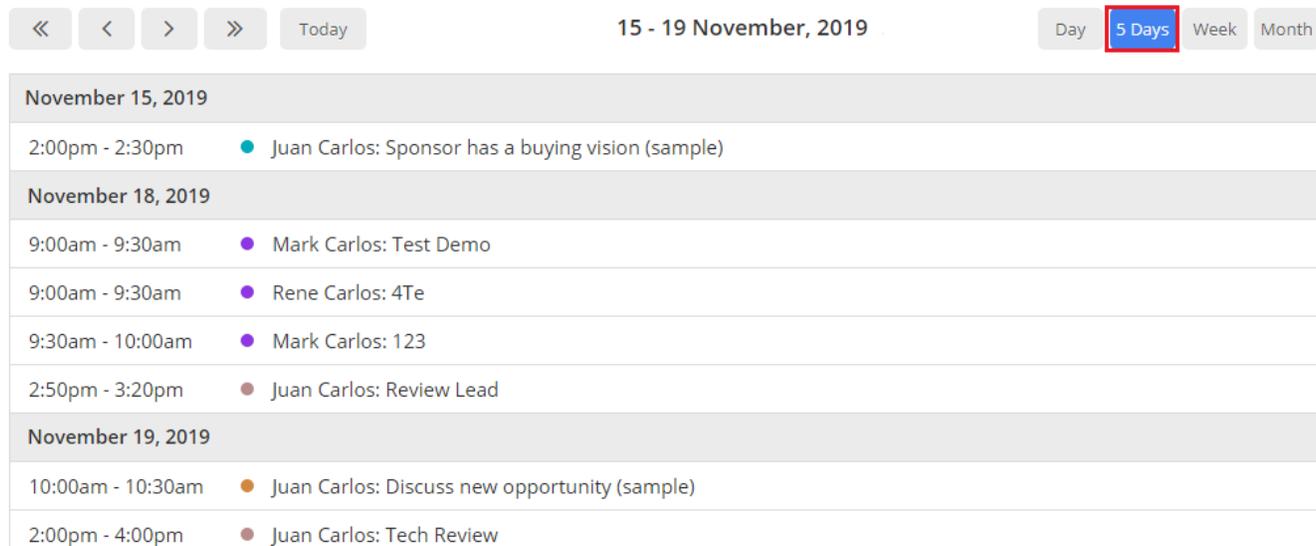


The screenshot shows the Day View interface. At the top, there are navigation buttons: double left arrow, left arrow, right arrow, double right arrow, and a 'Today' button. The date 'November 28, 2019' is displayed in the center. To the right, there are view selection buttons: 'Day' (highlighted with a red box), '2 Days', 'Week', and 'Month'. Below the navigation is a header for 'Wednesday'. The main content area lists three activities:

- 12:00am - 12:00am: Nancy Anderson: Creating FSD (blue dot)
- 12:00am - 12:00am: Sidney Higa: Discuss high level plans for future collaboration (purple dot)
- 4:00am - 10:00am: Paul Cannon: Greetings to client (green dot)

Day Span View:

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



The screenshot shows the Day Span View interface. At the top, there are navigation buttons: double left arrow, left arrow, right arrow, double right arrow, and a 'Today' button. The date range '15 - 19 November, 2019' is displayed in the center. To the right, there are view selection buttons: 'Day', '5 Days' (highlighted with a red box), 'Week', and 'Month'. Below the navigation is a header for 'November 15, 2019'. The main content area lists activities across three days:

- November 15, 2019**
 - 2:00pm - 2:30pm: Juan Carlos: Sponsor has a buying vision (sample) (blue dot)
- November 18, 2019**
 - 9:00am - 9:30am: Mark Carlos: Test Demo (purple dot)
 - 9:00am - 9:30am: Rene Carlos: 4Te (purple dot)
 - 9:30am - 10:00am: Mark Carlos: 123 (purple dot)
 - 2:50pm - 3:20pm: Juan Carlos: Review Lead (brown dot)
- November 19, 2019**
 - 10:00am - 10:30am: Juan Carlos: Discuss new opportunity (sample) (orange dot)
 - 2:00pm - 4:00pm: Juan Carlos: Tech Review (brown dot)

Week View:

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

Monday		November 18, 2019
9:30am - 10:30am	● Juan Carlos: Will be ordering soon (sample)	
10:00am - 10:30am	● Juan Carlos: Access to power negotiated (sample)	
2:00pm - 4:00pm	● Juan Carlos: Tech Review	
Tuesday		November 19, 2019
9:00am - 9:30am	● Mark Carlos: Test Demo	
9:00am - 9:30am	● Rene Carlos: 4Te	
9:30am - 10:00am	● Mark Carlos: 123	
Wednesday		November 20, 2019
10:00am - 10:30pm	● Juan Carlos: Proposal Issue, Decision Due (sample)	
Thursday		November 21, 2019
1:00pm - 3:00pm	● Juan Carlos: Requirement Together	
1:00pm - 2:00pm	● Juan Carlos: Product Release meeting	
Friday		November 22, 2019
2:50pm - 3:20pm	● Juan Carlos: Review Lead	

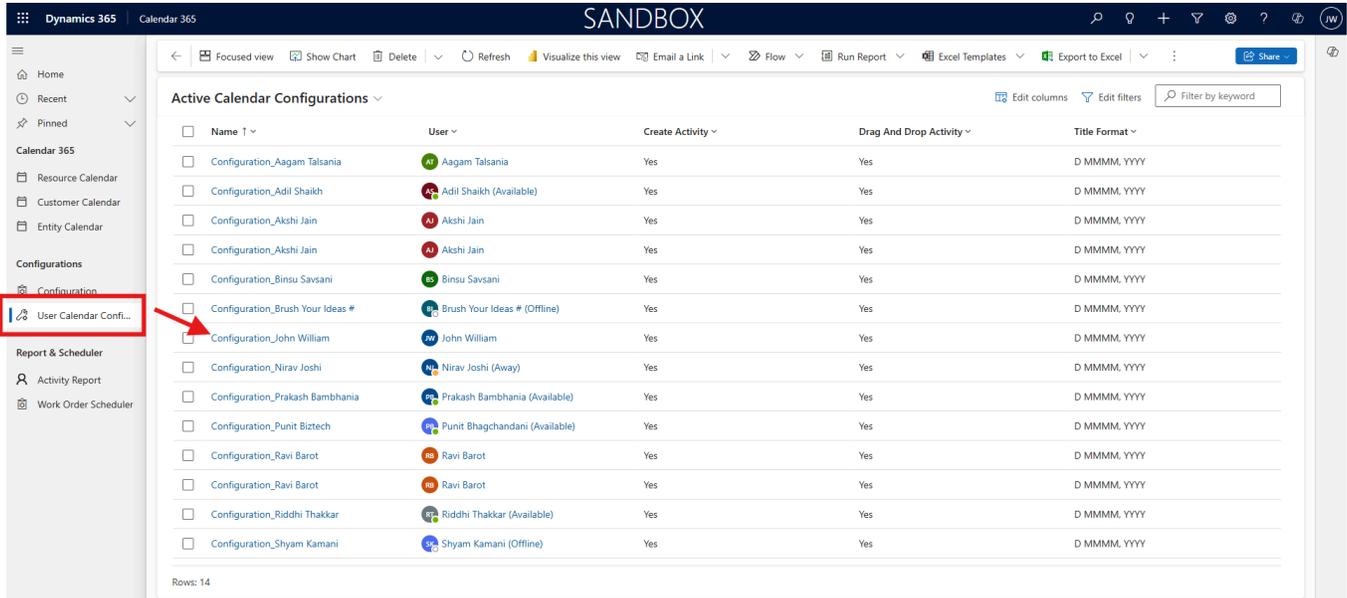
Month View:

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

November 5, 2019	Tuesday
10:00am - 1:00pm	● Maria Campbell (sample): List of upcoming Technical Events
November 15, 2019	Friday
10:00pm - 10:30pm	● Maria Campbell (sample): Pain admitted by sponsor (sample)
November 19, 2019	Tuesday
11:00am - 12:30pm	● Nancy Anderson (sample): Nancy B'Day celebration
November 28, 2019	Thursday
10:00am - 11:00am	● Maria Campbell (sample): Price Proposal

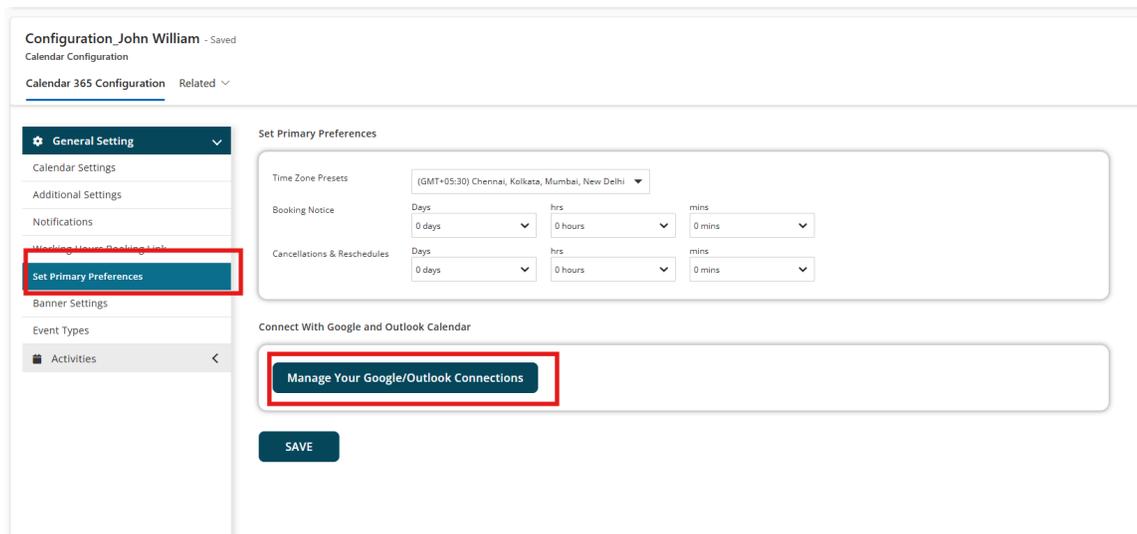
Two Way Sync - Outlook/Google Calendar

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



Name	User	Create Activity	Drag And Drop Activity	Title Format
Configuration_Aagam Talsania	Aagam Talsania	Yes	Yes	D MMMM, YYYY
Configuration_Adil Shaikh	Adil Shaikh (Available)	Yes	Yes	D MMMM, YYYY
Configuration_Akshi Jain	Akshi Jain	Yes	Yes	D MMMM, YYYY
Configuration_Akshi Jain	Akshi Jain	Yes	Yes	D MMMM, YYYY
Configuration_Binsu Savsani	Binsu Savsani	Yes	Yes	D MMMM, YYYY
Configuration_Brush Your Ideas #	Brush Your Ideas # (Offline)	Yes	Yes	D MMMM, YYYY
Configuration_John William	John William	Yes	Yes	D MMMM, YYYY
Configuration_Nirav Joshi	Nirav Joshi (Away)	Yes	Yes	D MMMM, YYYY
Configuration_Prakash Bambhania	Prakash Bambhania (Available)	Yes	Yes	D MMMM, YYYY
Configuration_Punit Biztech	Punit Bhagchandani (Available)	Yes	Yes	D MMMM, YYYY
Configuration_Ravi Barot	Ravi Barot	Yes	Yes	D MMMM, YYYY
Configuration_Ravi Barot	Ravi Barot	Yes	Yes	D MMMM, YYYY
Configuration_Riddhi Thakkar	Riddhi Thakkar (Available)	Yes	Yes	D MMMM, YYYY
Configuration_Shyan Kamani	Shyan Kamani (Offline)	Yes	Yes	D MMMM, YYYY

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**.



Configuration_John William - Saved
Calendar: Configuration

Calendar 365 Configuration Related

General Setting

- Calendar Settings
- Additional Settings
- Notifications
- Working Hours/Resting Hours
- Set Primary Preferences**
- Banner Settings
- Event Types
- Activities

Set Primary Preferences

Time Zone Presets: (GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi

Booking Notice: Days: 0 days, hrs: 0 hours, mins: 0 mins

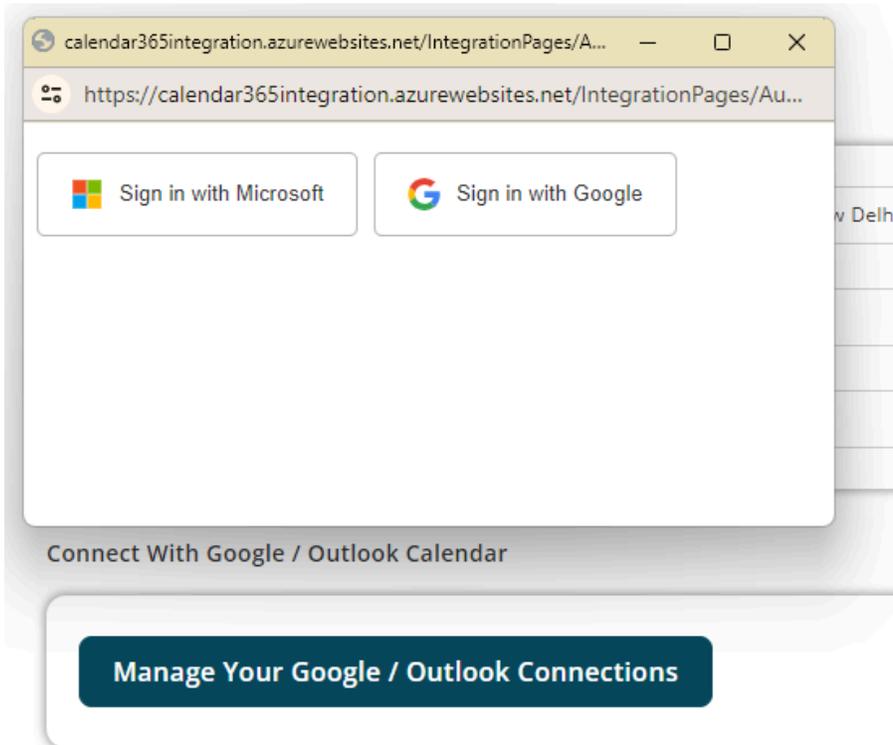
Cancellations & Reschedules: Days: 0 days, hrs: 0 hours, mins: 0 mins

Connect With Google and Outlook Calendar

Manage Your Google/Outlook Connections

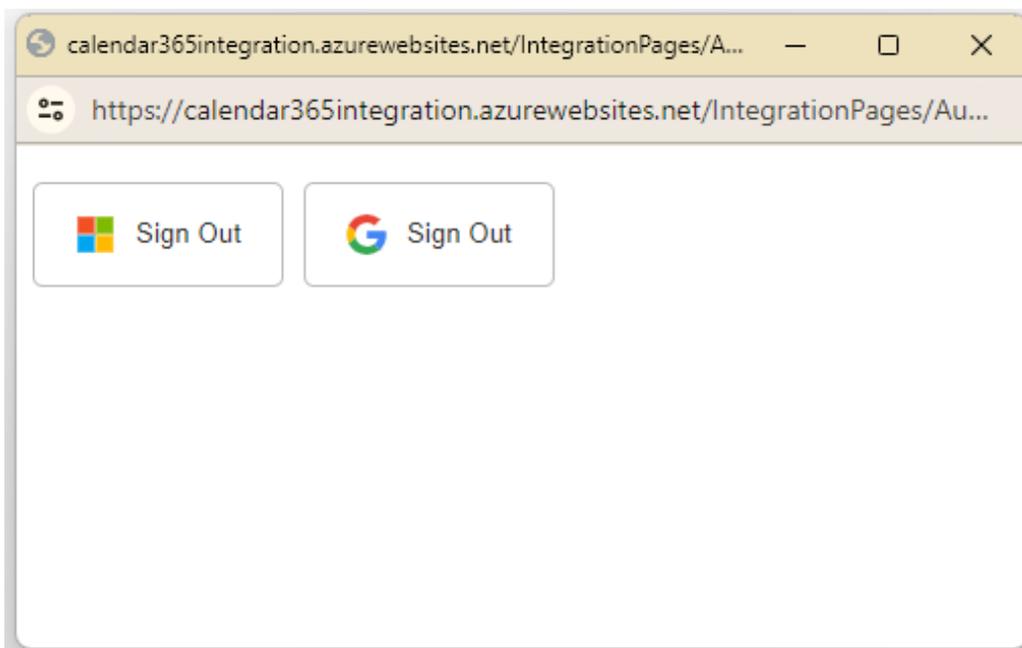
SAVE

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



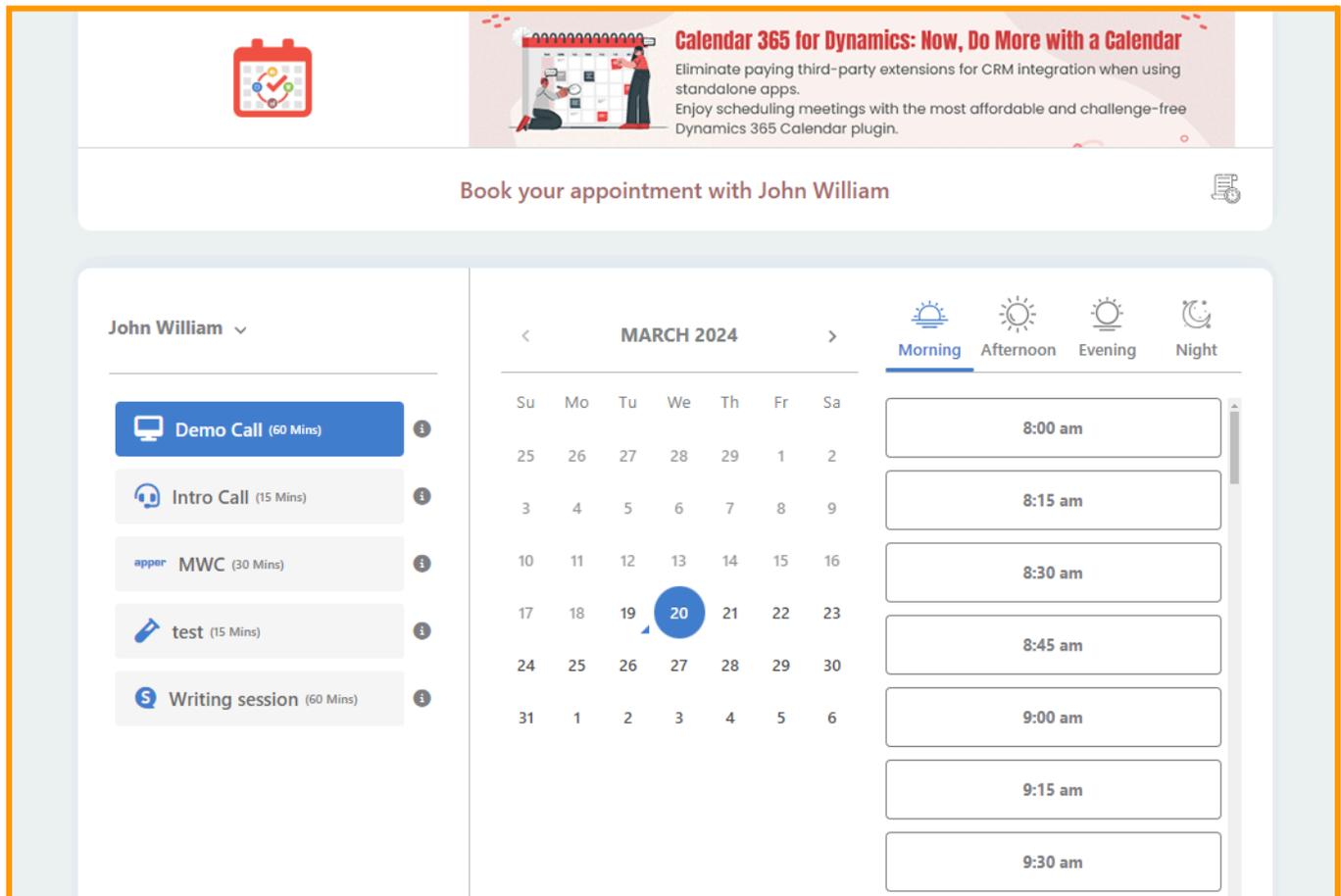
The respective buttons will allow you to sign in to Microsoft and Google. Once you have signed it, the button will be replaced with a Sign Out button. Click on "Save" after all the configurations.

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.



The screenshot shows a user interface for booking an appointment with John William. At the top, there is a promotional banner for "Calendar 365 for Dynamics" with the text: "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." Below the banner, the text "Book your appointment with John William" is displayed. The main interface is divided into three sections: a list of services on the left, a calendar for March 2024 in the center, and a list of available time slots on the right. The services listed are: "Demo Call (60 Mins)", "Intro Call (15 Mins)", "MWC (30 Mins)", "test (15 Mins)", and "Writing session (60 Mins)". The calendar shows the date 20th of March 2024 selected. The time slots available are: 8:00 am, 8:15 am, 8:30 am, 8:45 am, 9:00 am, 9:15 am, and 9:30 am.

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

The screenshot displays the Appjetty booking interface. At the top, there is a promotional banner for "Calendar 365 for Dynamics" with the text: "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." Below the banner, the main heading is "Book your appointment".

On the left, a user profile for "John William" is shown with a dropdown arrow. Below the profile, there is a list of available meeting types:

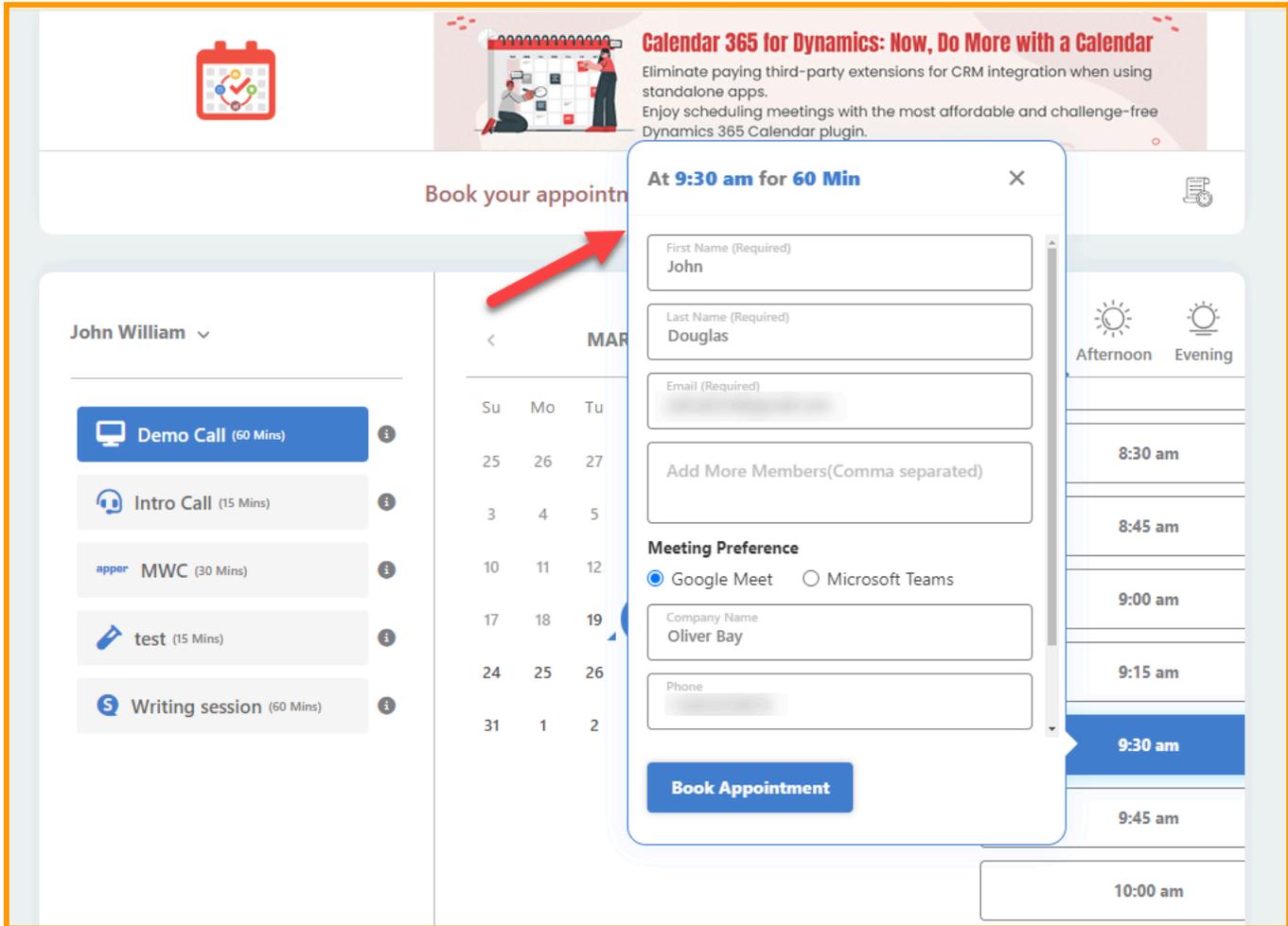
- Demo Call (60 Mins)
- Intro Call (15 Mins)
- MWC (30 Mins)
- test (15 Mins)
- Writing session (60 Mins)

In the center, a calendar for the month of March is visible, with the date 19th highlighted. A modal form is overlaid on the calendar, titled "At 9:30 am for 60 Min". The form contains the following fields:

- First Name (Required)
- Last Name (Required)
- Email (Required)
- Add More Members(Comma separated)
- Meeting Preference: Google Meet Microsoft Teams
- Company Name
- Phone

At the bottom of the form is a blue button labeled "Book Appointment". To the right of the form, a vertical list of time slots is shown, with "9:30 am" selected and highlighted in blue. Other time slots include 8:30 am, 8:45 am, 9:00 am, 9:15 am, 9:45 am, and 10:00 am. Above the time slots, there are icons for "Afternoon" and "Evening".

You need to fill in the following details:



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.

Book your appointment

At 9:30 am for 60 Min

First Name (Required)
John

Last Name (Required)
Douglas

Email (Required)

Add More Members(Comma separated)

Meeting Preference
 Google Meet Microsoft Teams

Company Name
Oliver Bay

Phone

Book Appointment

John William

Demo Call (60 Mins)

Intro Call (15 Mins)

MWC (30 Mins)

test (15 Mins)

Writing session (60 Mins)

MAR

Su Mo Tu

25 26 27

3 4 5

10 11 12

17 18 19

24 25 26

31 1 2

Afternoon Evening

8:30 am

8:45 am

9:00 am

9:15 am

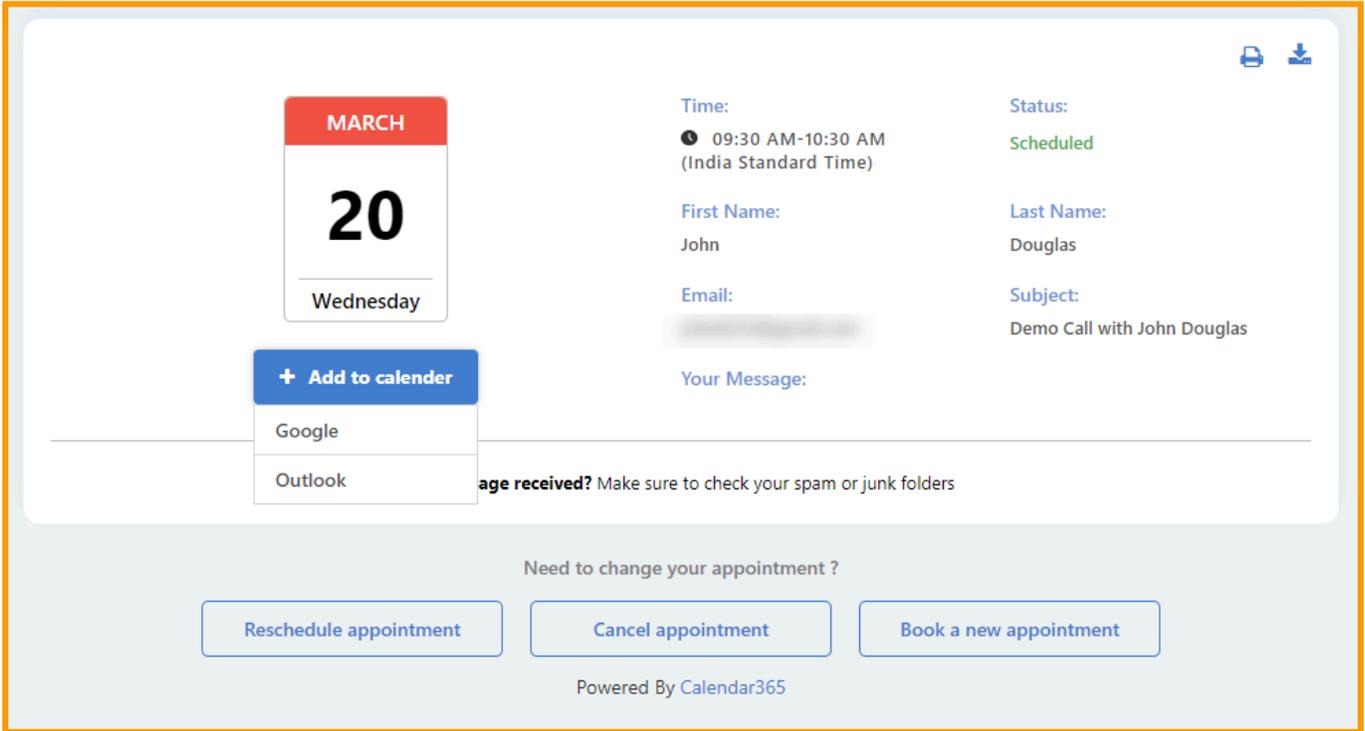
9:30 am

9:45 am

10:00 am

- **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.



MARCH
20
Wednesday

+ Add to calendar
Google
Outlook

Message received? Make sure to check your spam or junk folders

Time: 09:30 AM-10:30 AM (India Standard Time)
Status: Scheduled

First Name: John
Last Name: Douglas
Email: [Redacted]
Subject: Demo Call with John Douglas

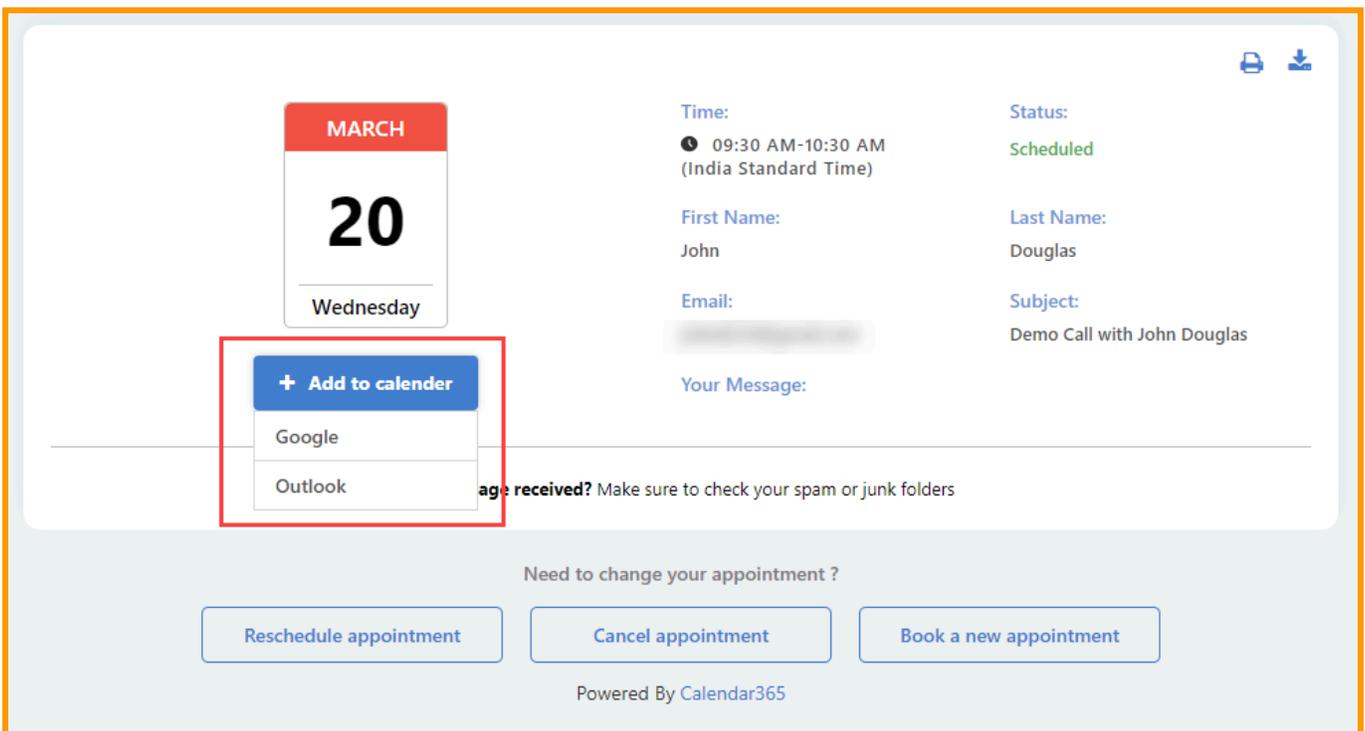
Your Message:

Need to change your appointment ?

Reschedule appointment Cancel appointment Book a new appointment

Powered By Calendar365

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



MARCH
20
Wednesday

+ Add to calendar
Google
Outlook

Message received? Make sure to check your spam or junk folders

Time: 09:30 AM-10:30 AM (India Standard Time)
Status: Scheduled

First Name: John
Last Name: Douglas
Email: [Redacted]
Subject: Demo Call with John Douglas

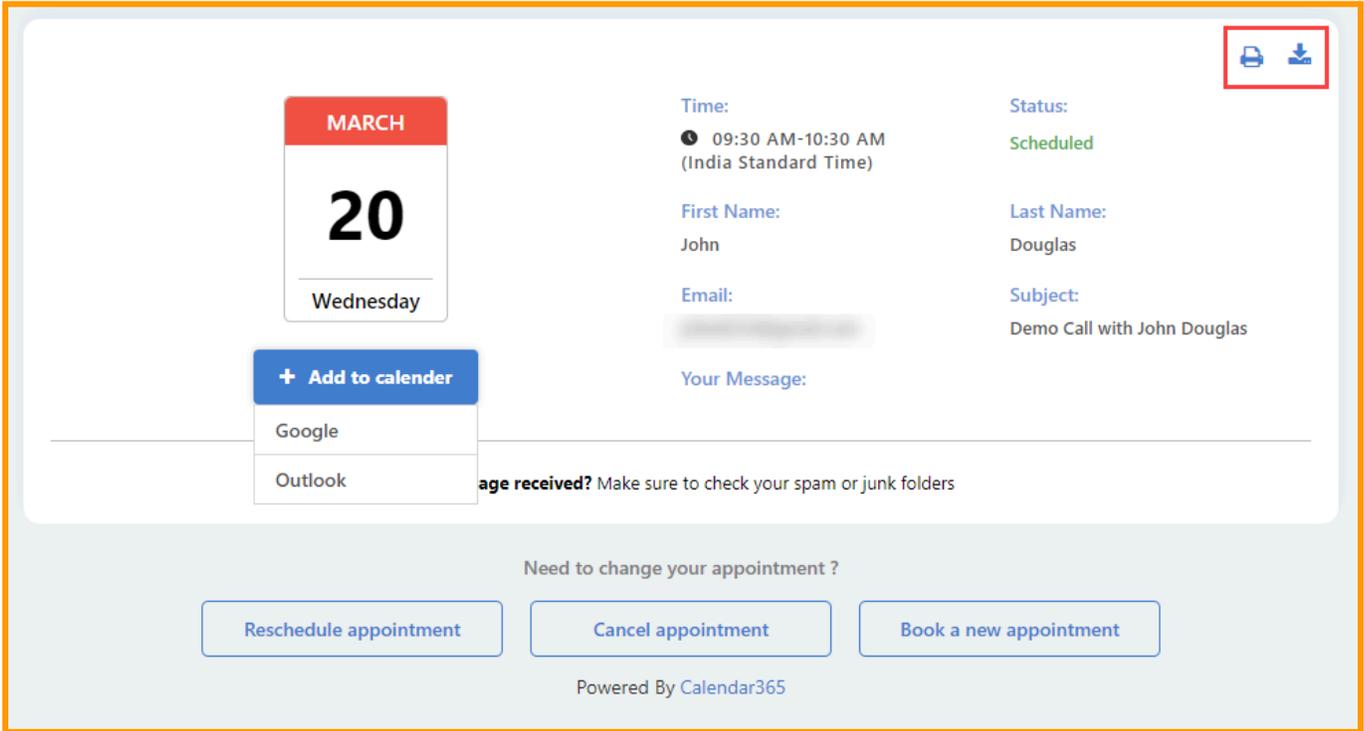
Your Message:

Need to change your appointment ?

Reschedule appointment Cancel appointment Book a new appointment

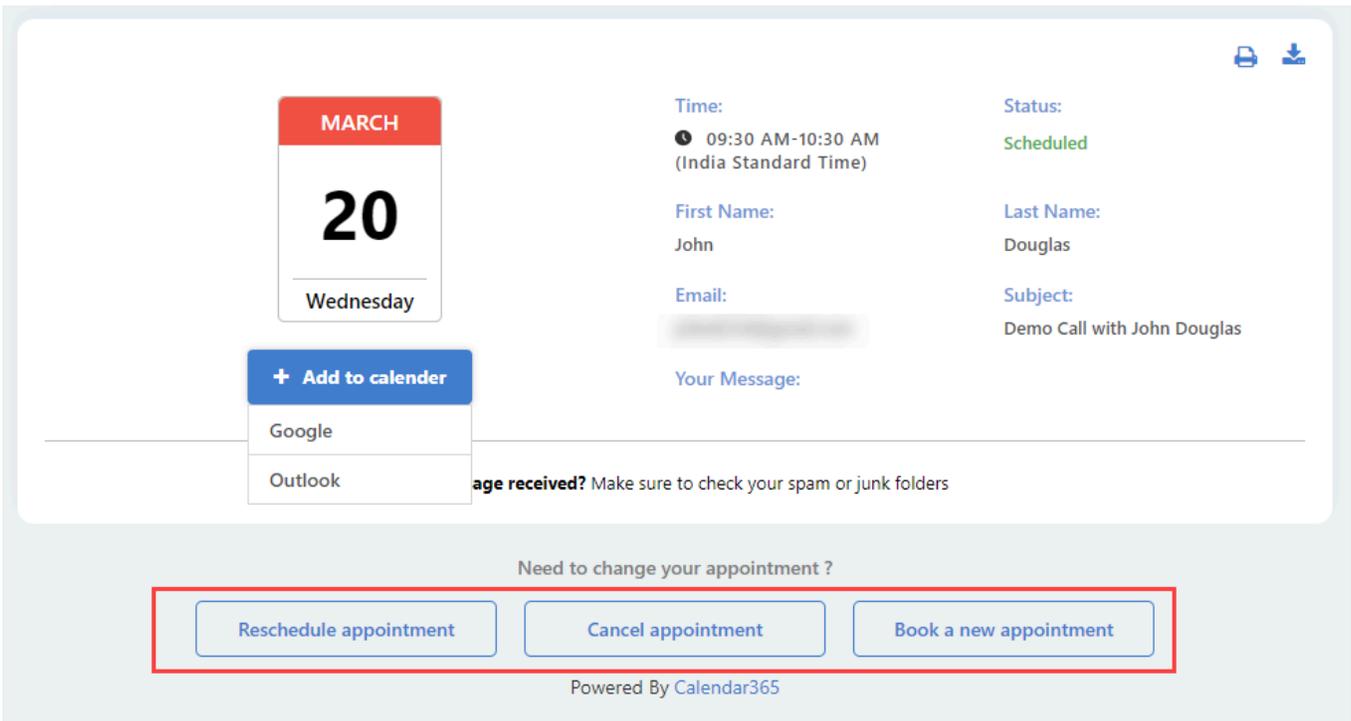
Powered By Calendar365

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



This screenshot shows an appointment management interface. On the left, a calendar card displays 'MARCH 20 Wednesday'. Below it is a '+ Add to calendar' button with a dropdown menu showing 'Google' and 'Outlook'. To the right, appointment details are listed: Time (09:30 AM-10:30 AM), Status (Scheduled), First Name (John), Last Name (Douglas), and Subject (Demo Call with John Douglas). A 'Your Message:' field is also present. At the bottom, three buttons are visible: 'Reschedule appointment', 'Cancel appointment', and 'Book a new appointment'. A red box highlights the top right corner with print and download icons.

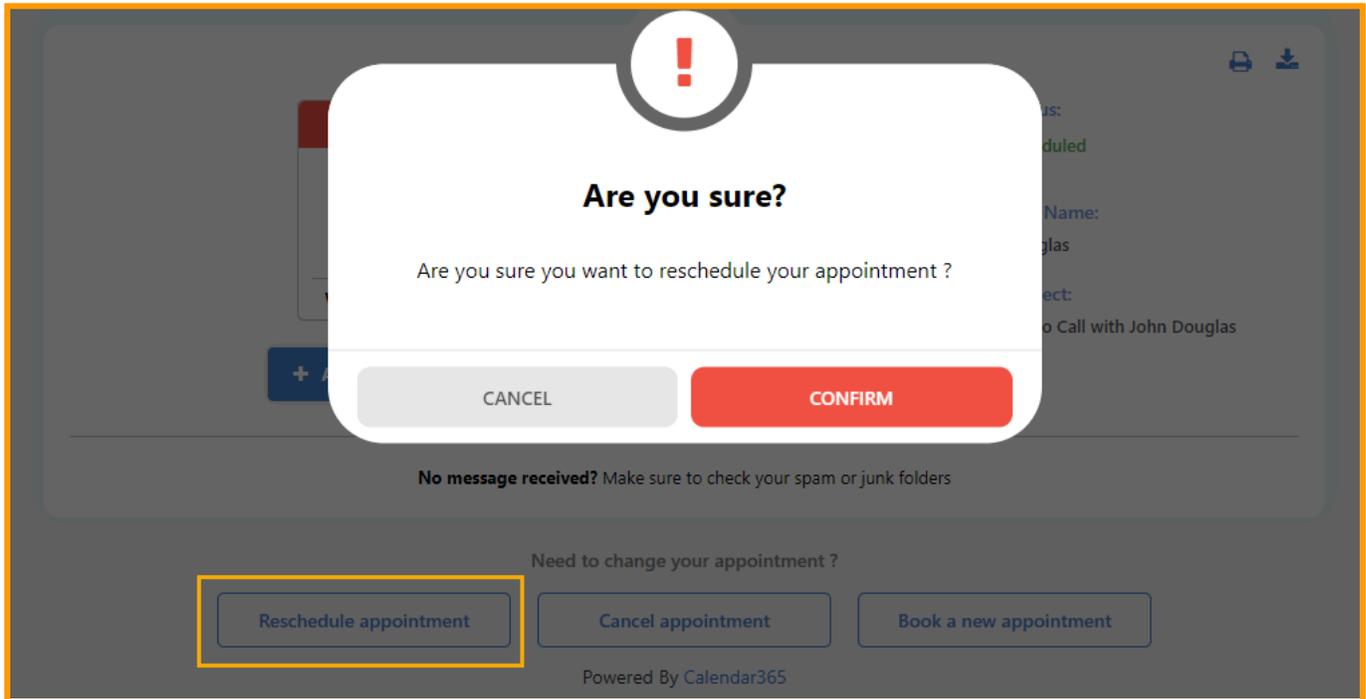
Your customer also has an option to **Reschedule**, **Cancel**, and **Book a new appointment**.



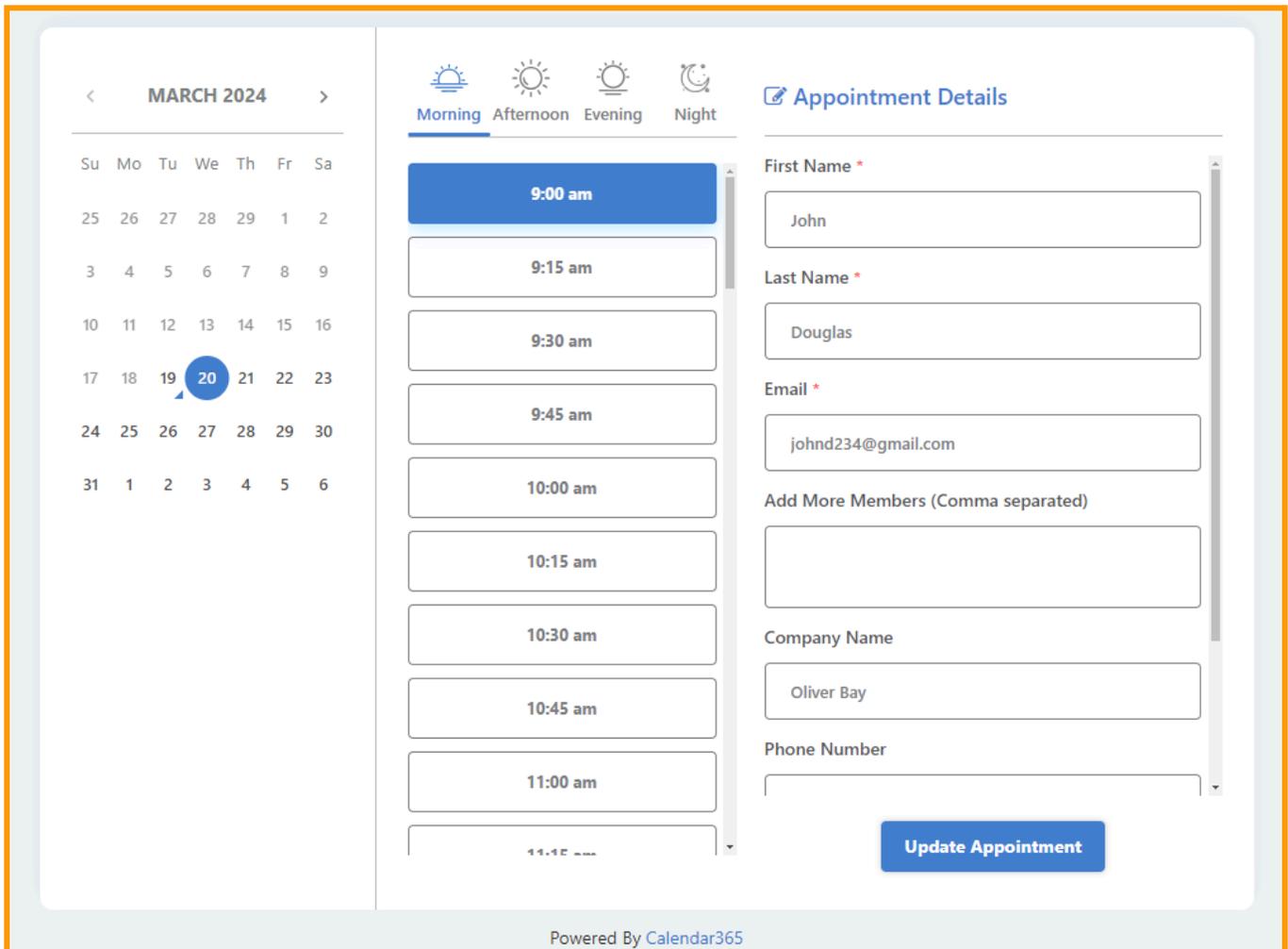
This screenshot is identical to the one above, but with a red rectangular box highlighting the three buttons at the bottom: 'Reschedule appointment', 'Cancel appointment', and 'Book a new appointment'. The rest of the interface, including the calendar card and appointment details, remains the same.

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.





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.

Summary Appointment



MARCH
20
Wednesday

[+ Add to calendar](#)

Time:	Status:
🕒 09:00 AM-09:00 AM (India Standard Time)	Scheduled
First Name:	Last Name:
John	Douglas
Email:	Subject:
[Redacted]	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](#)

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 calendar](#)

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** >

Morning
 Afternoon
 Evening
 Night

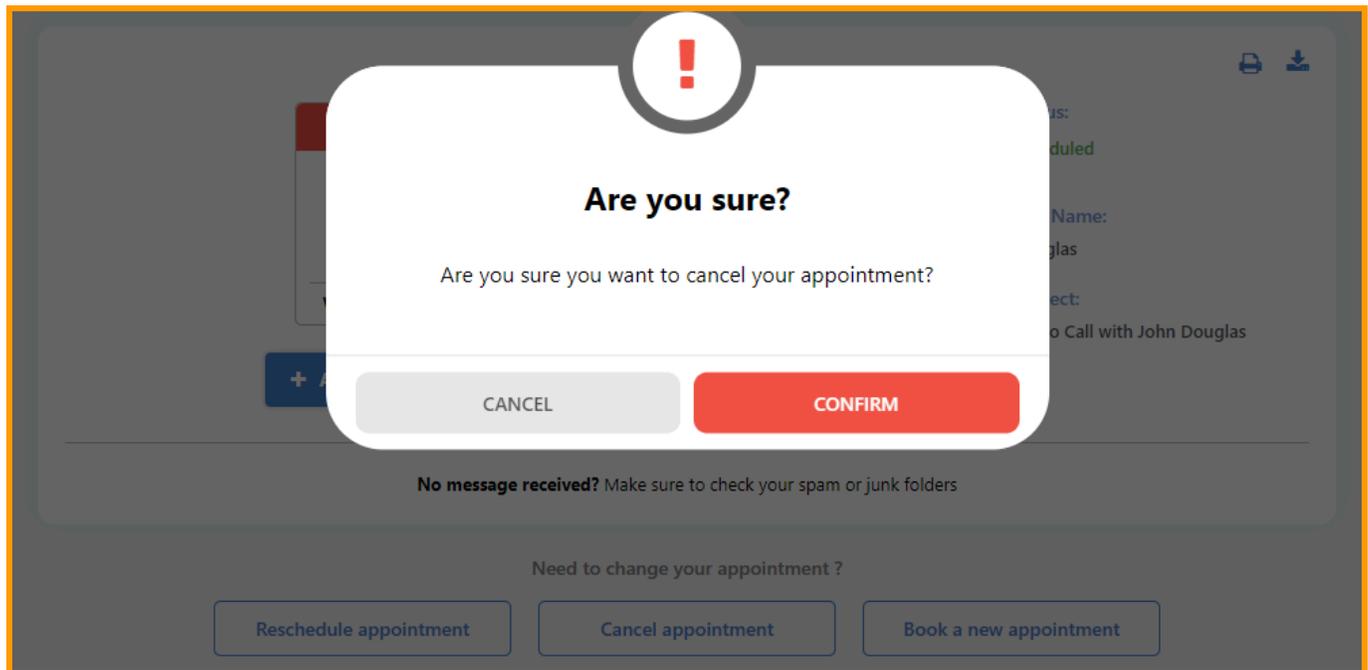
Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

- 8:00 am
- 8:15 am
- 8:30 am
- 8:45 am
- 9:00 am
- 9:15 am
- 9:30 am
- 9:45 am

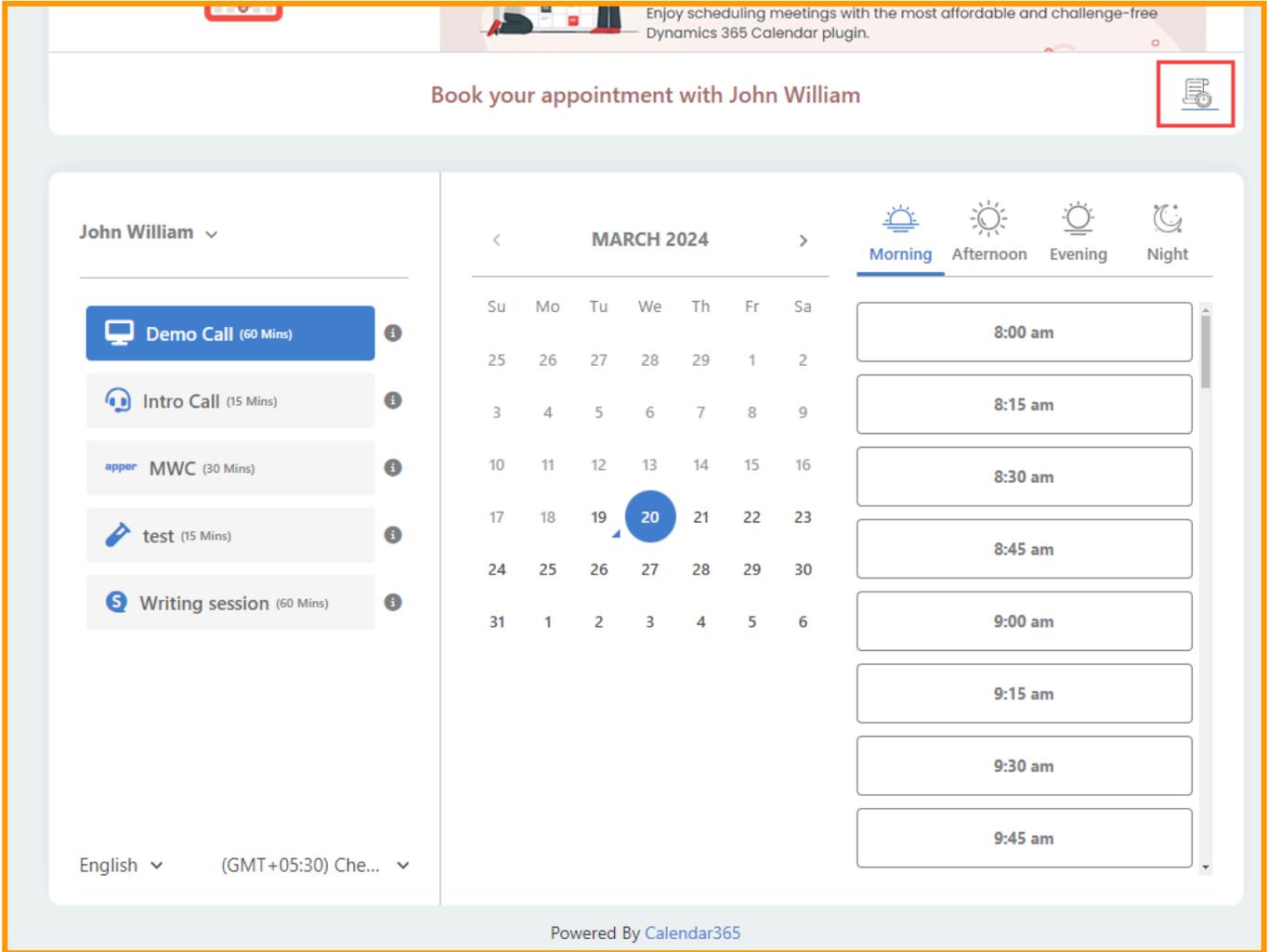
Powered By [Calendar365](#)

Cancel Appointment

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



Appointment History

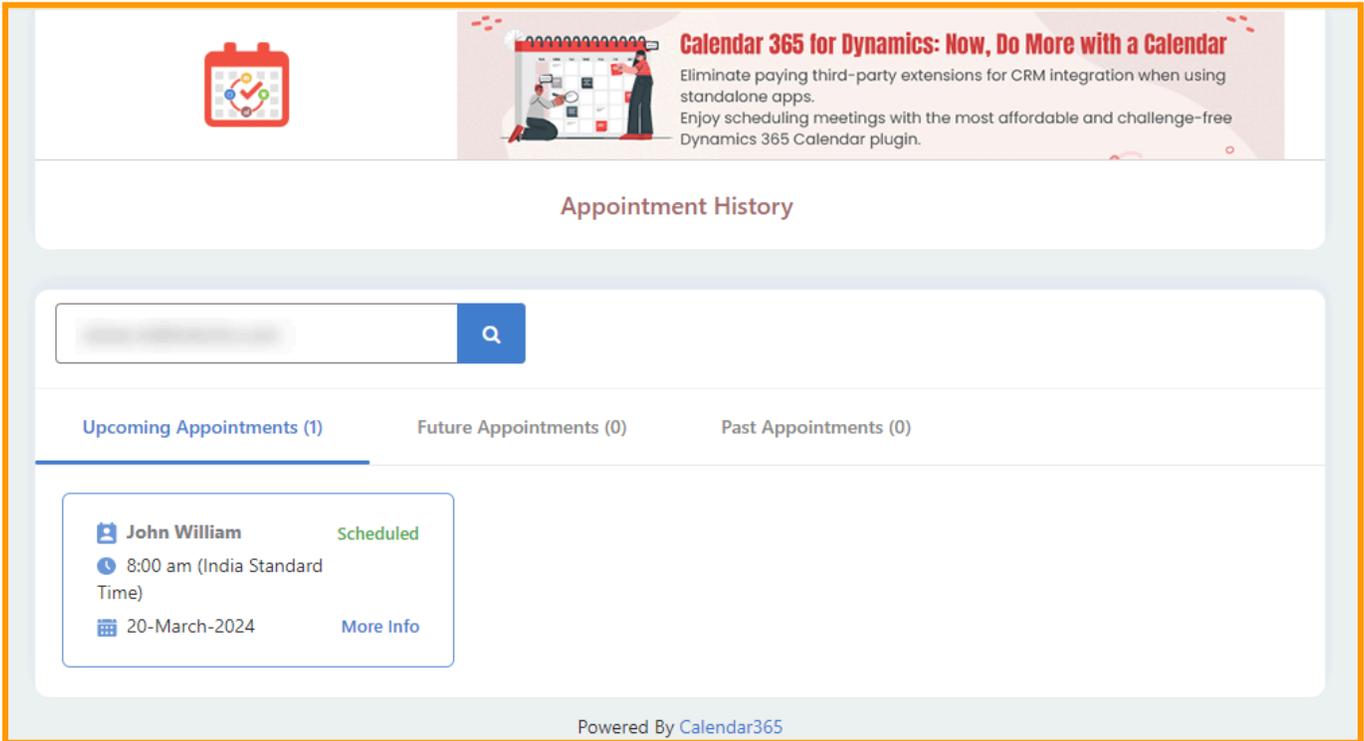


The screenshot displays the appointment booking interface for John William. At the top, a banner reads "Book your appointment with John William" and includes a calendar icon. Below this, the interface is divided into three main sections:

- Left Panel:** Lists appointment types for John William:
 - Demo Call (60 Mins)
 - Intro Call (15 Mins)
 - MWC (30 Mins)
 - test (15 Mins)
 - Writing session (60 Mins)
- Calendar:** Shows a calendar for MARCH 2024. The date 20th is highlighted. The days of the week are labeled: Su, Mo, Tu, We, Th, Fr, Sa.
- Time Slots:** A vertical list of time slots for the selected date, categorized under "Morning":
 - 8:00 am
 - 8:15 am
 - 8:30 am
 - 8:45 am
 - 9:00 am
 - 9:15 am
 - 9:30 am
 - 9:45 am

At the bottom, there are dropdown menus for "English" and "(GMT+05:30) Che...". The footer indicates "Powered By Calendar365".

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



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.

Appointment History

[Q](#)

Upcoming Appointments (1) Future Appointments (0) Past Appointments (0)

 **John William** Scheduled

 8:00 am (India Standard Time)

 20-March-2024 [More Info](#)

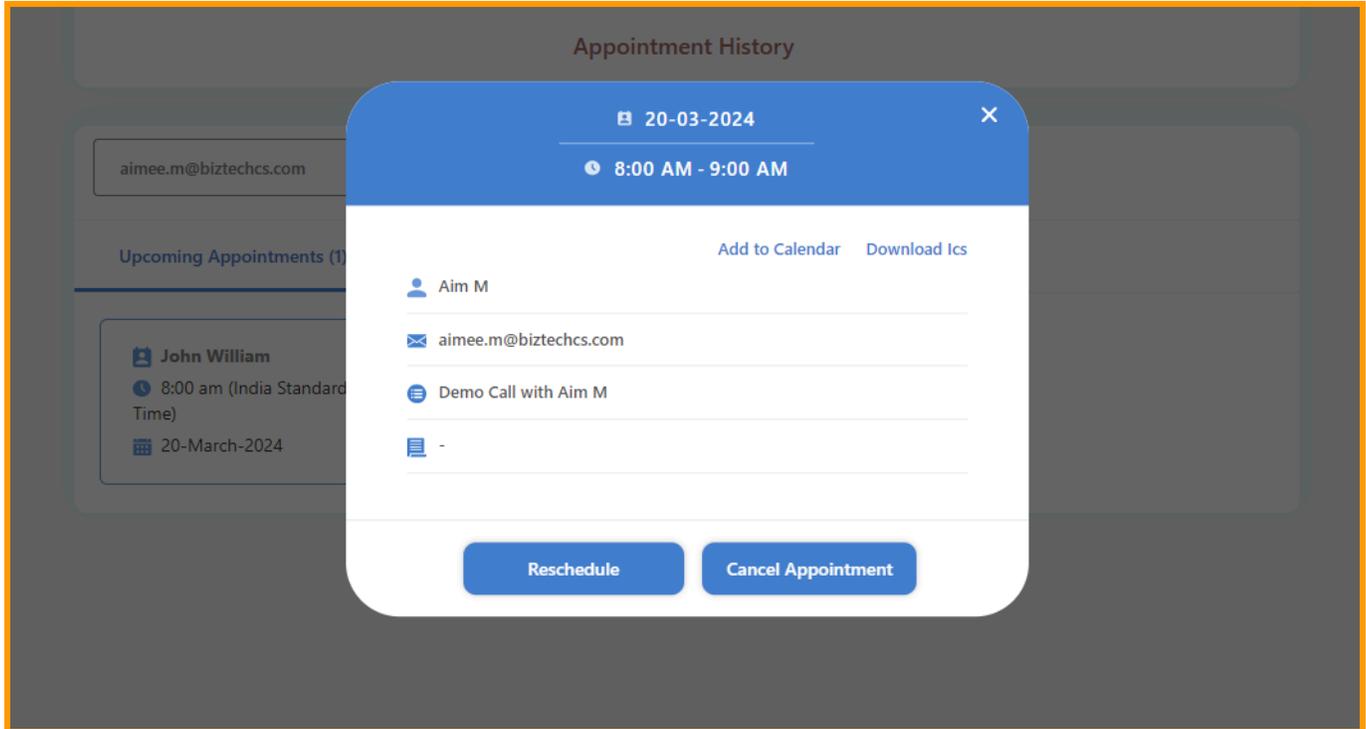
Powered By [Calendar365](#)

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.

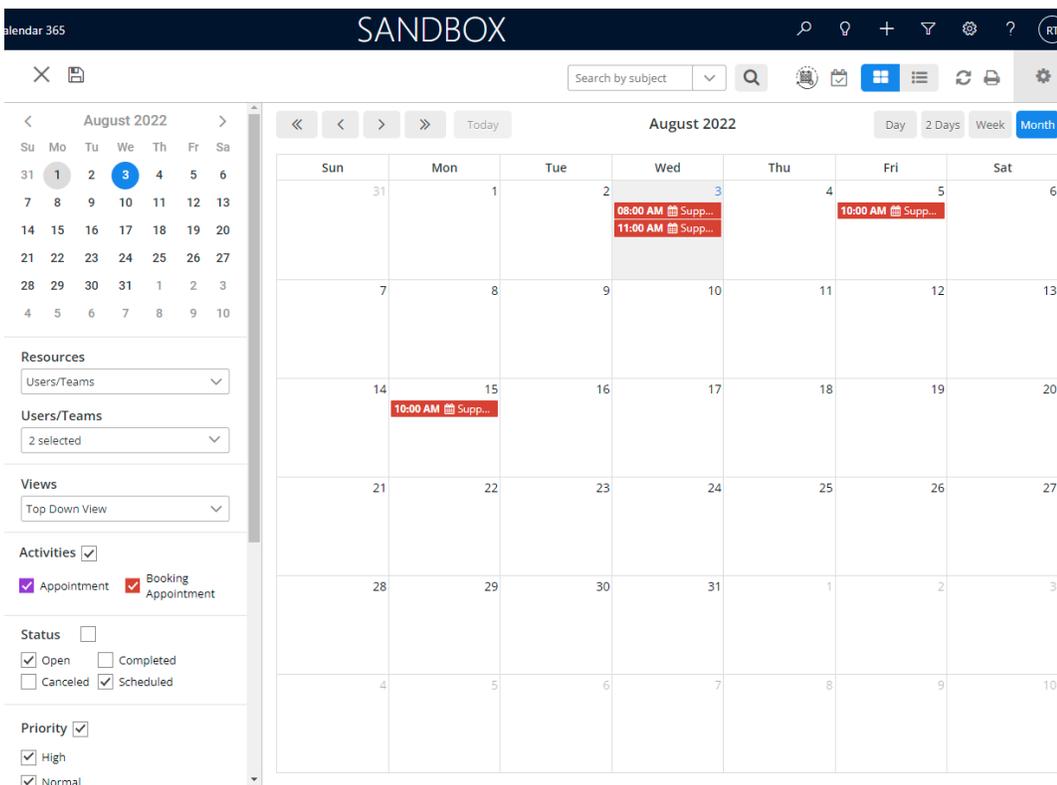
More Info : When clicked upon a pop-up containing the details of the appointment would be displayed.



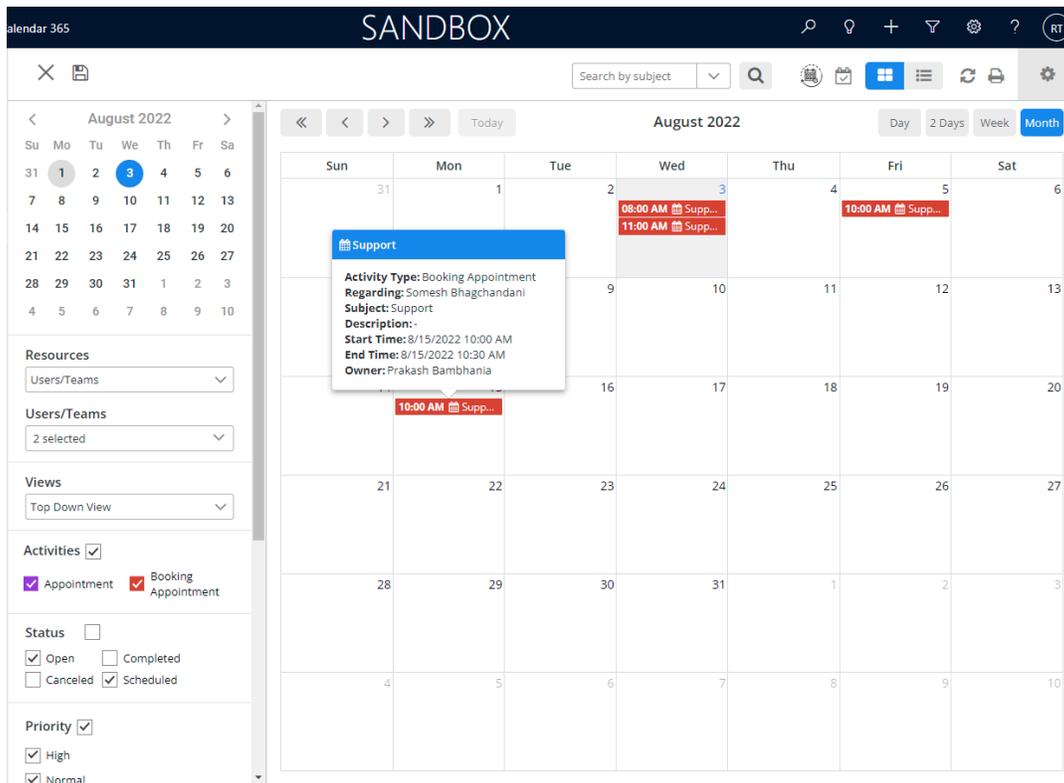
Here customer only has **Add to Calendar**, **Download Ics**, **Reschedule**, and **Cancel Appointment** options.

Check Booking Appointment

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



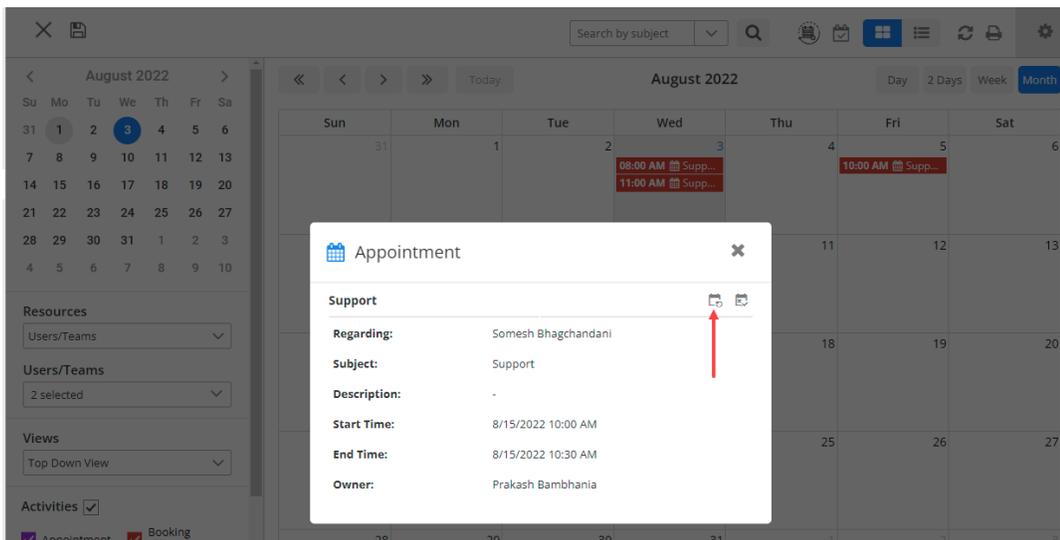
By hovering on it, you can view the basic details of the appointment as per the configuration.

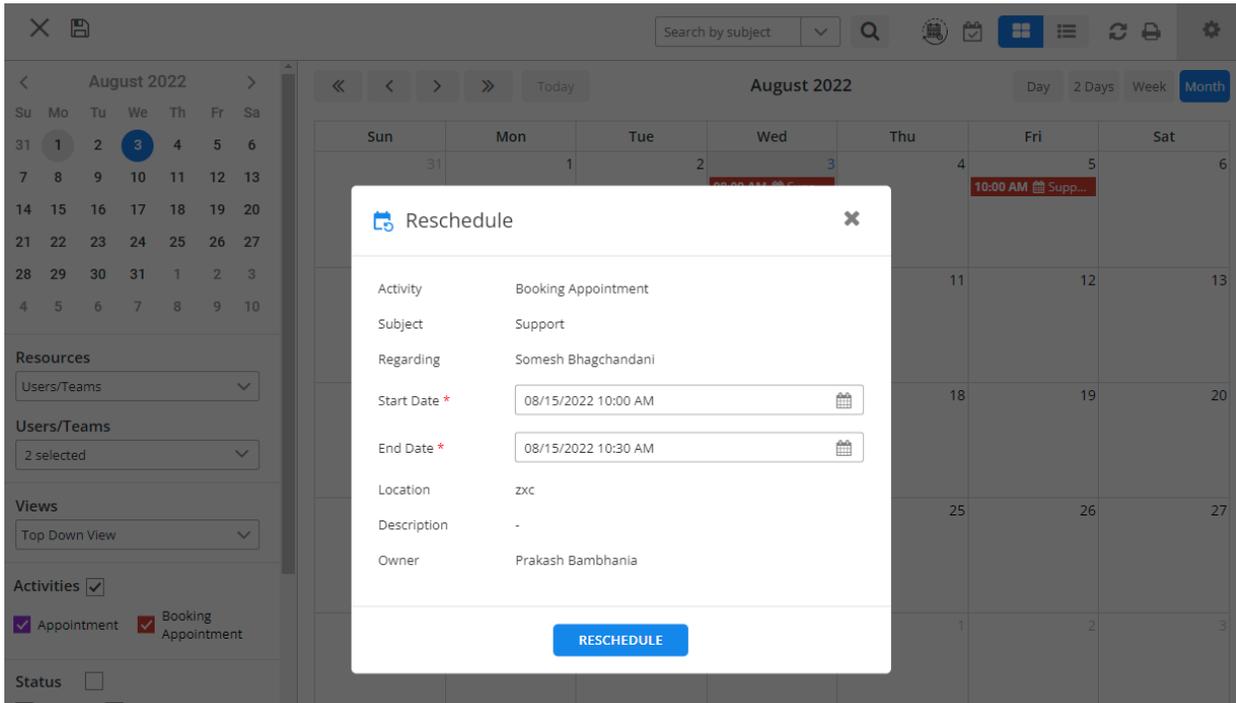


By clicking on the appointment, you can view its details and you will have an option to **Reschedule**, **Re-assign**, and **Cancel** the appointment.

Reschedule

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

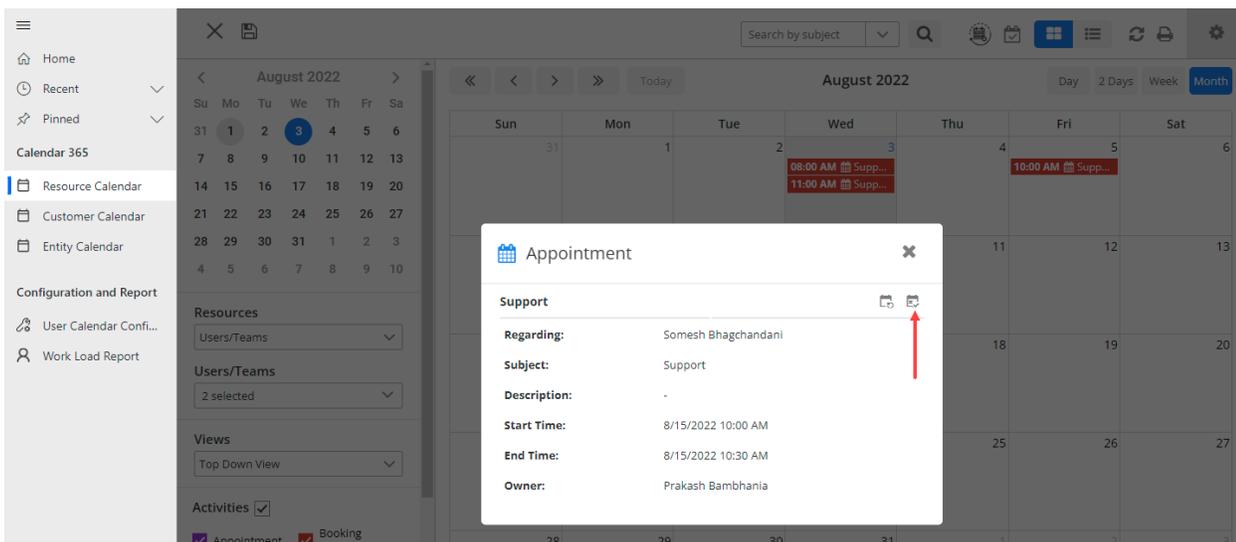




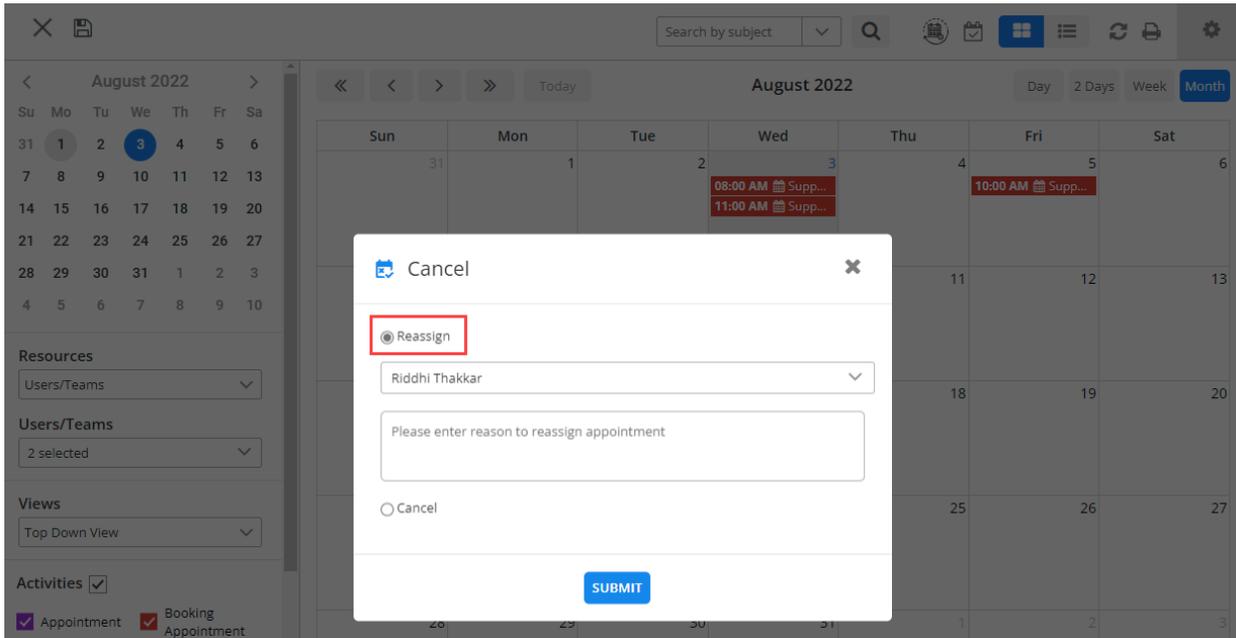
After change, the date of an appointment click on the Reschedule and the appointment will be rescheduled with your customer.

Reassign

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

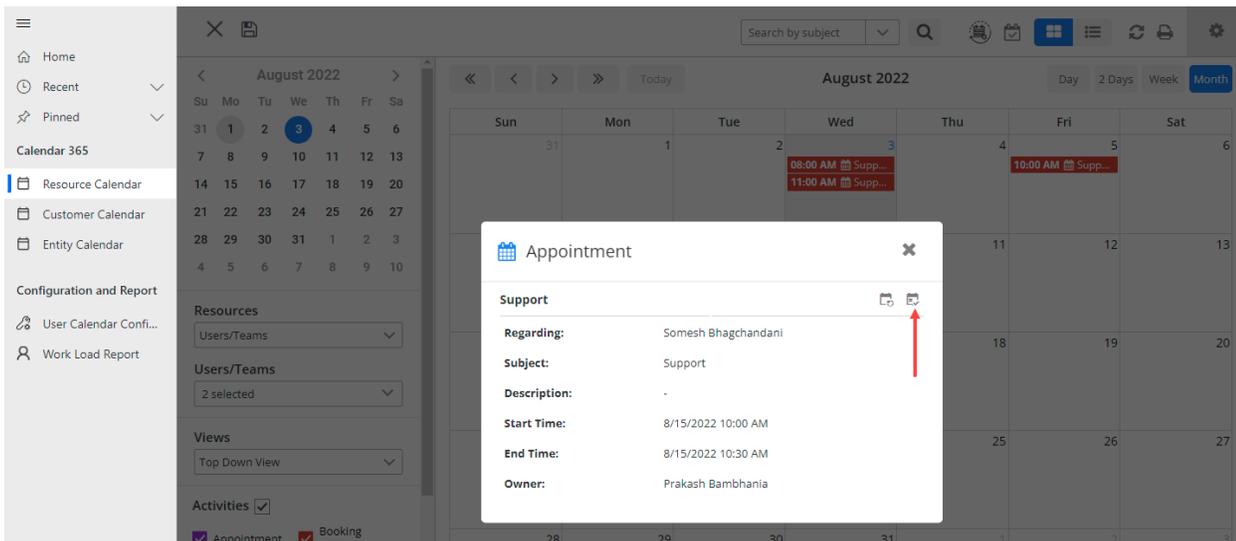


Select the person you want to assign this appointment to, insert the reason to reassign the appointment, and click on the **Submit** button.

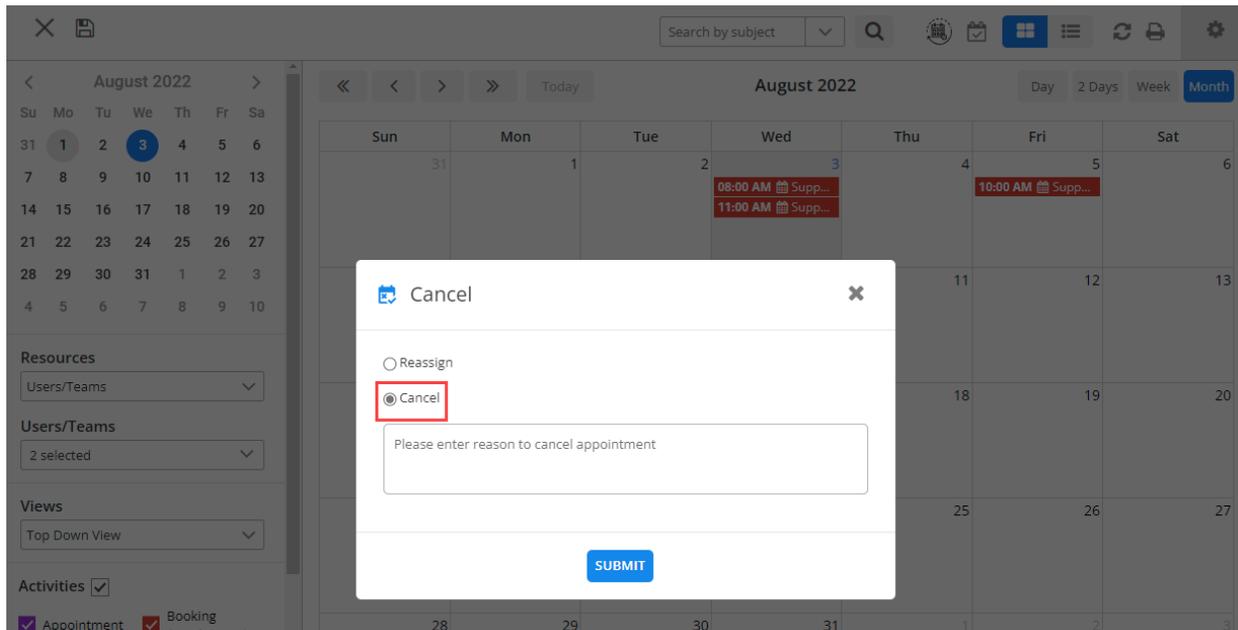


Cancel

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



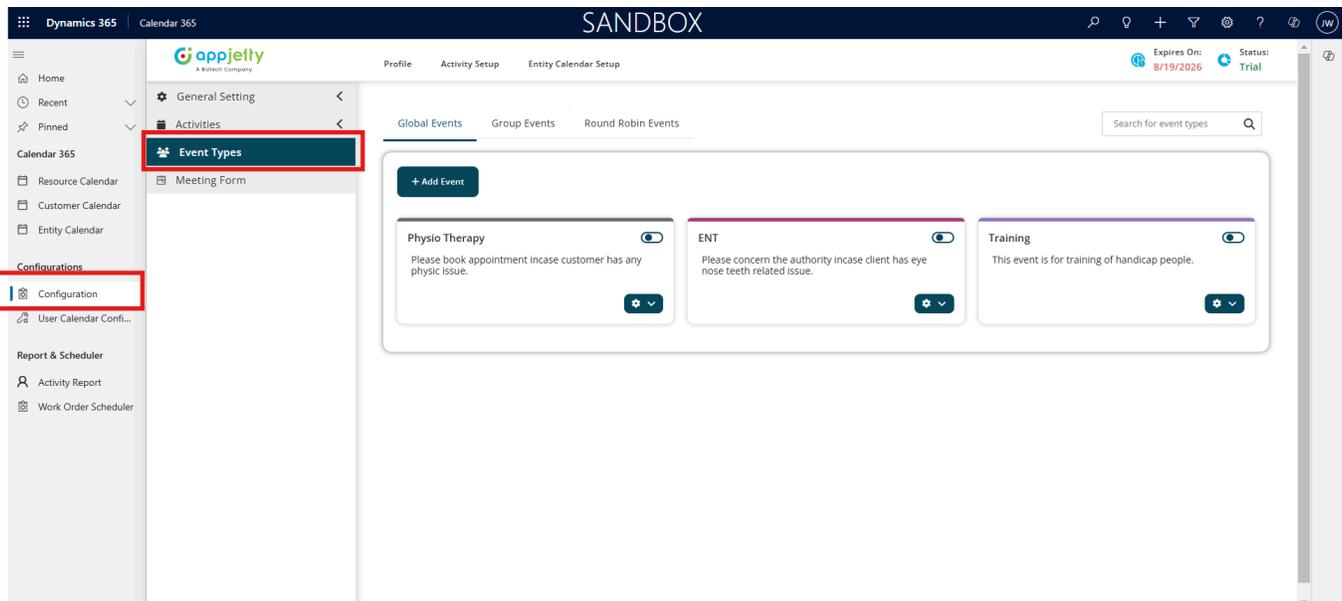
Insert the reason to cancel the appointment and click on the **Submit** button.



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.

Global Events

Group Events

Round Robin Events

+ Add Event

Announcement



/Announcement



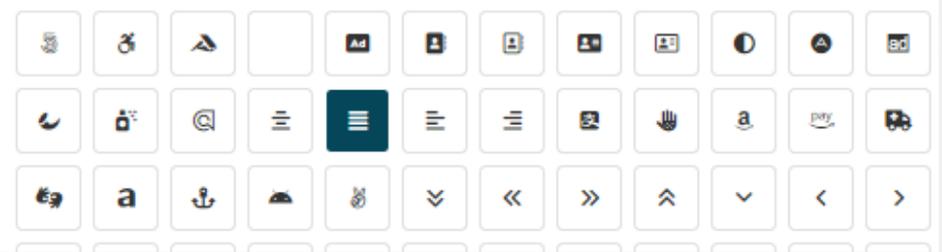
The form contains the following fields :

- > **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.

Add Event Type



Select Icon *



Name *

Description

Event Duration *

15 min	30 min	45 min	60 min	Custom min
--------	--------	--------	--------	------------

Add Member

Select Member

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.

+ Add Event

Announcement
/Announcement



Medical Discussion
/Medical Discussion



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.

Medical Discussion



< MARCH 2024 >



Morning



Afternoon



Evening



Night

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



No Slot available

Contact US

Powered By [Calendar365](#)

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.

Global Events **Group Events** Round Robin Events

+ Add Event

Announcement

/Announcement

⚙️ ▾

Medical Discussion

/Medical Discussion

⚙️ ▾

Edit ✎

Copy 📄

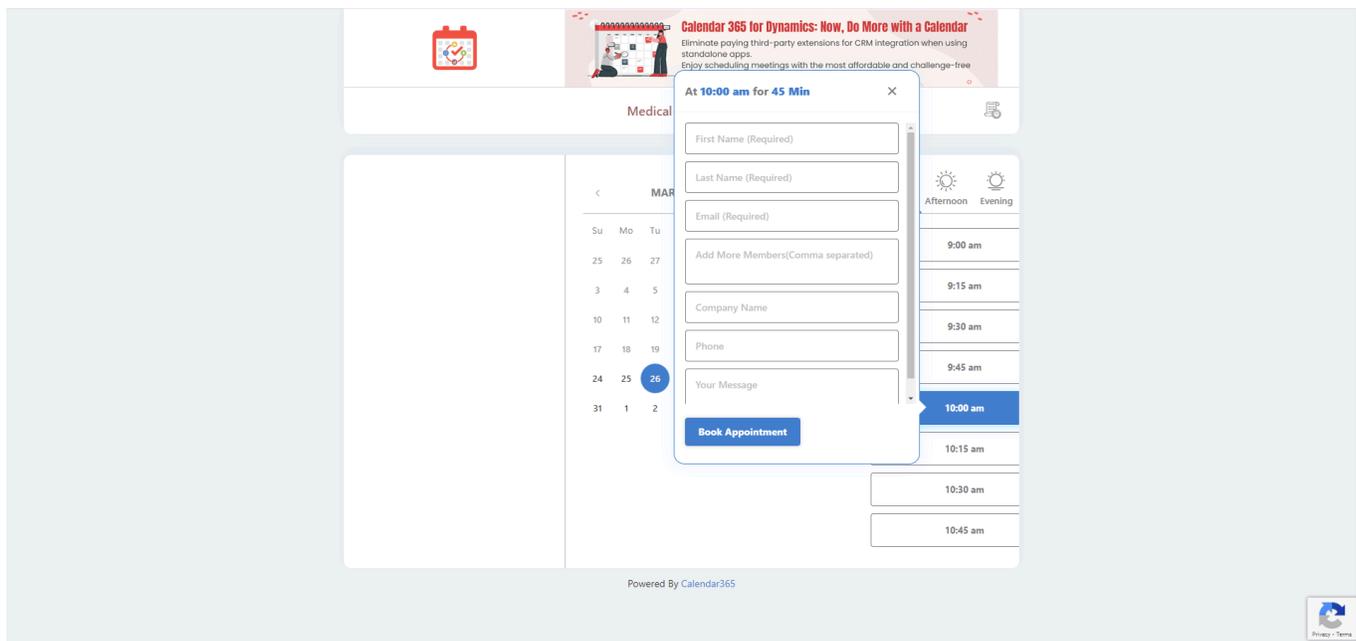
Embed </>

Delete 🗑

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.



The screenshot shows a web interface for booking a medical appointment. At the top, there is a banner for "Calendar 365 for Dynamics: Now, Do More with a Calendar". Below this, a calendar for the month of March is visible, with the 26th highlighted. A time slot selection menu is open, showing slots from 9:00 am to 10:45 am, with 10:00 am selected. A booking form is overlaid on the calendar, containing the following fields:

- First Name (Required)
- Last Name (Required)
- Email (Required)
- Add More Members(Comma separated)
- Company Name
- Phone
- Your Message

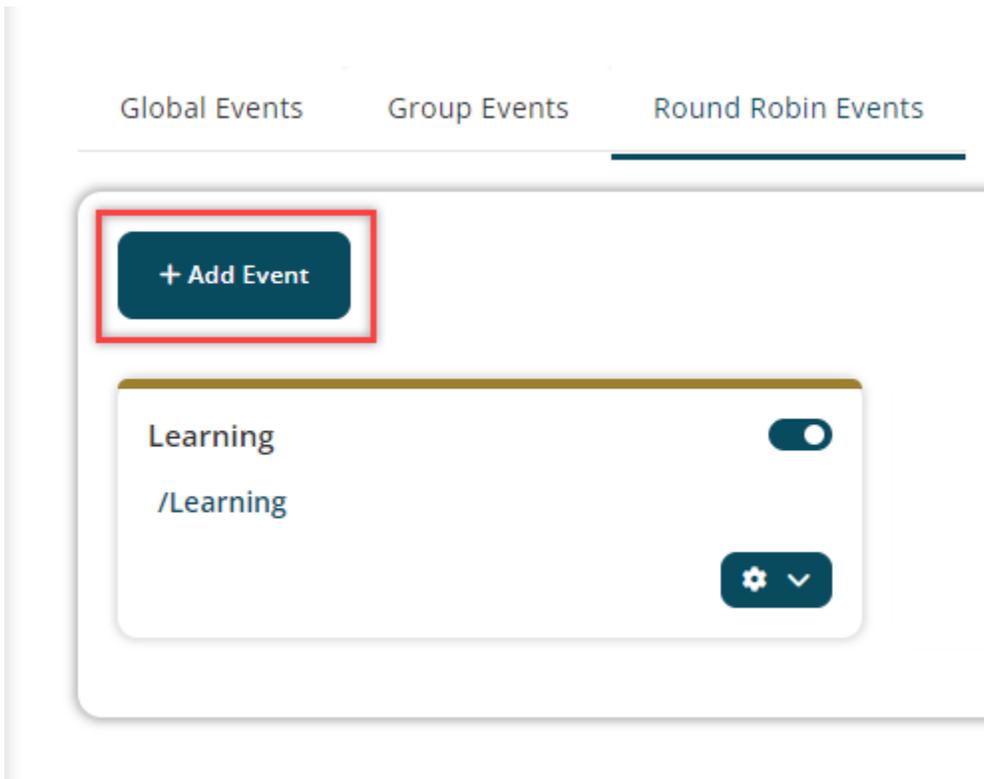
A "Book Appointment" button is located at the bottom of the form. The interface also includes a "Medical" header, a "Calendar 365" logo, and a "Powered By Calendar365" footer. A "Privacy - Terms" link is visible in the bottom right corner.

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.

+ 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 >



Morning Afternoon Evening Night

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

10:15 am

10:30 am

10:45 am

11:00 am

11:15 am

11:30 am

11:45 am

Settings

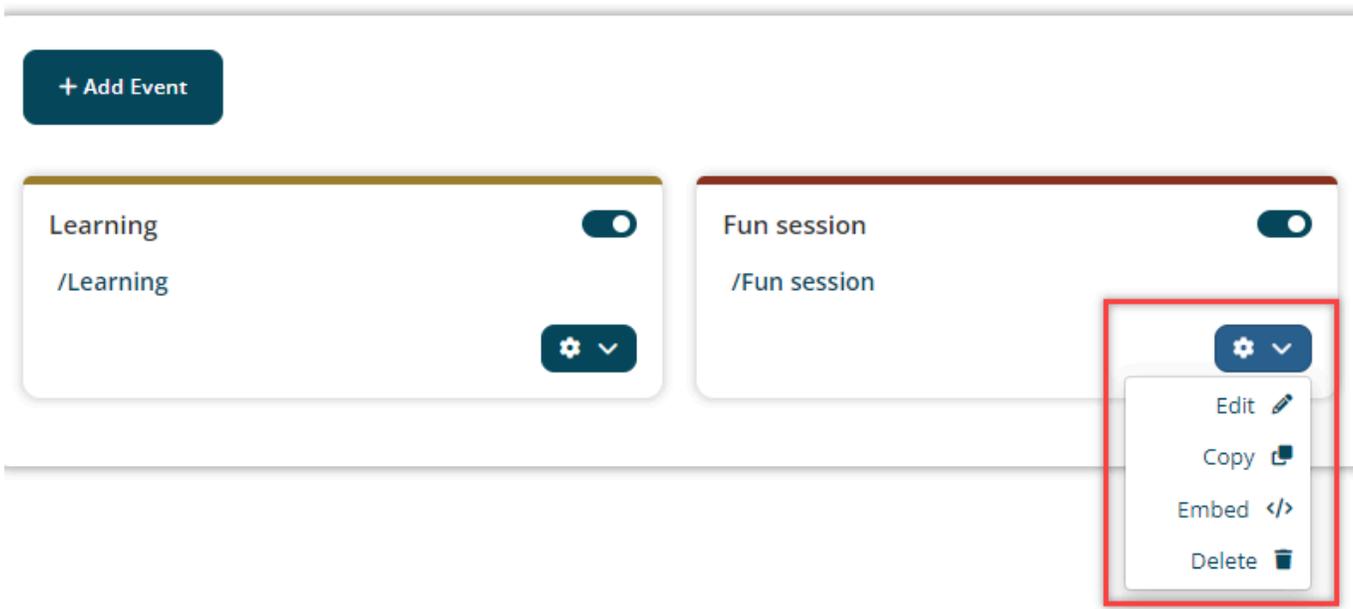
You can perform various actions such as :

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

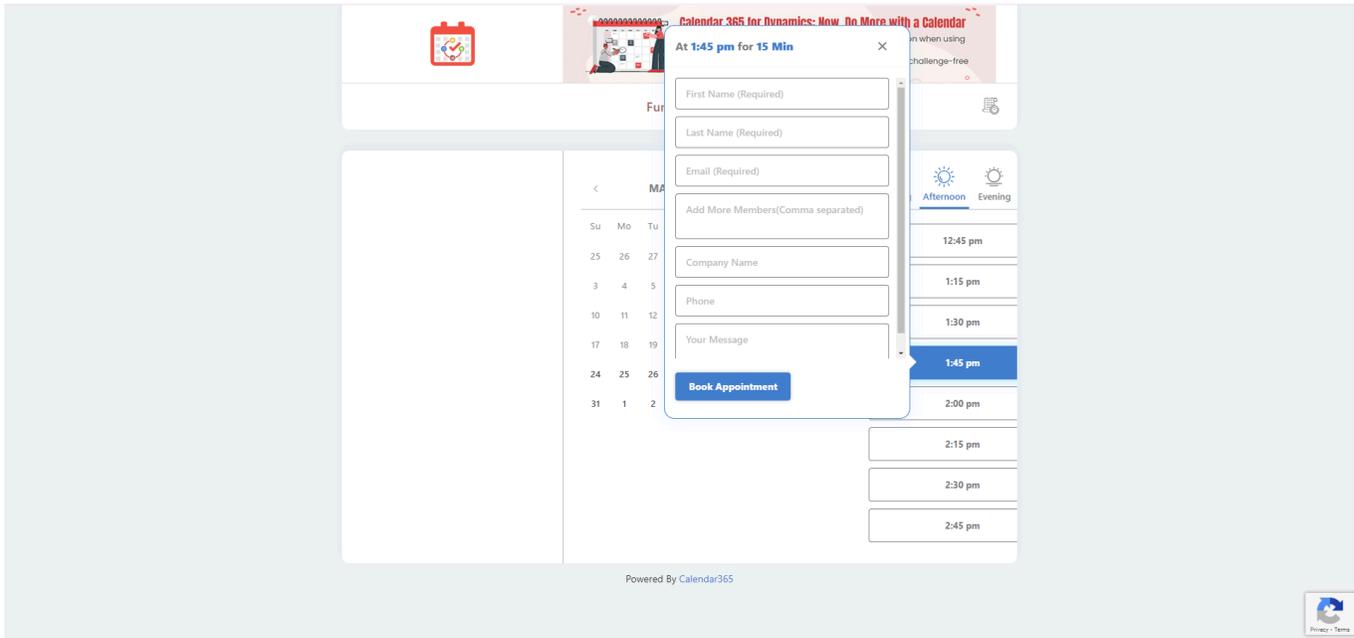
Copy -> Clicking here copies all the details of the current event into a new form.

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.

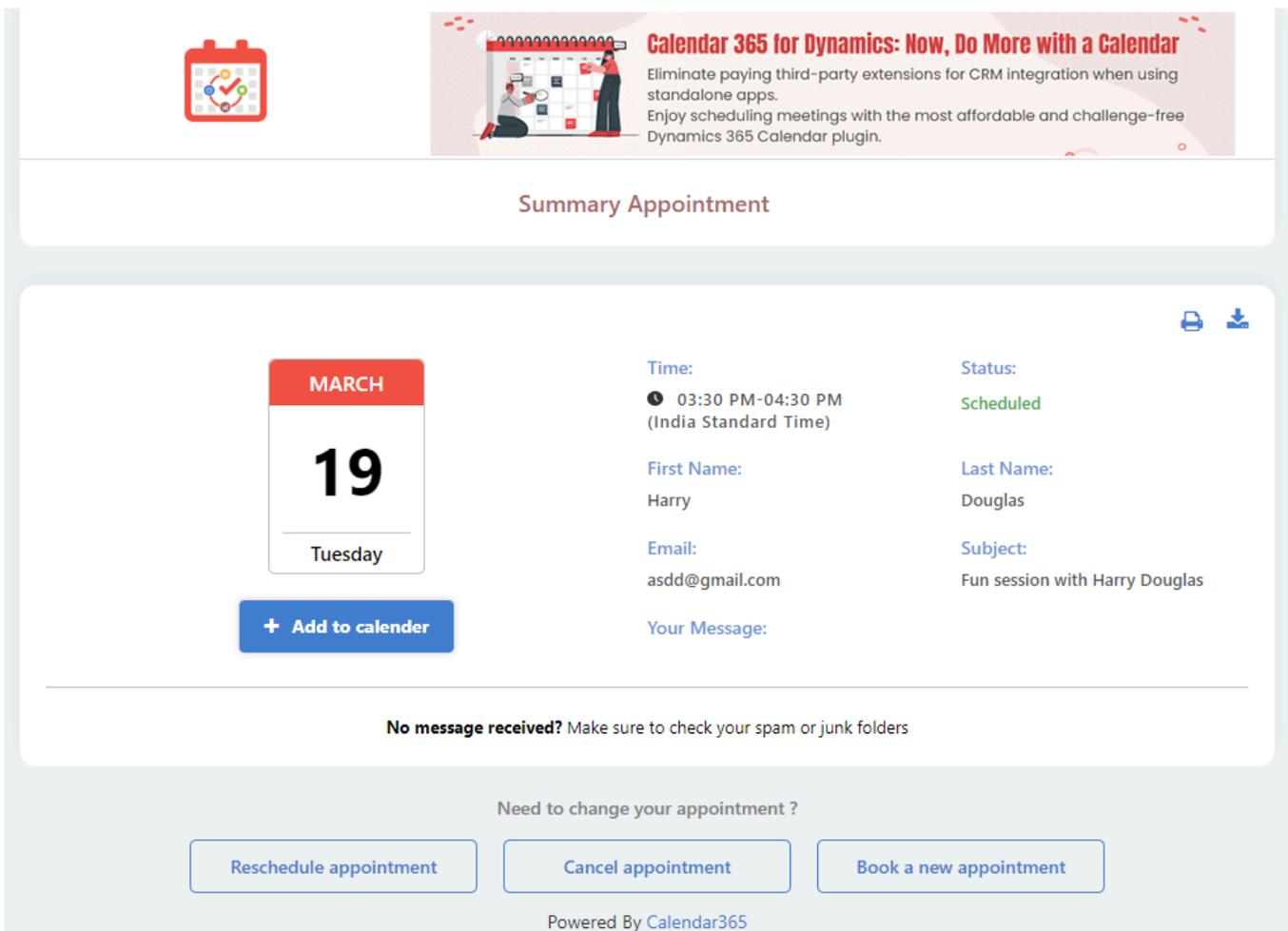


When navigated to the booking link calendar then all the available slots of the respective members will be present.



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

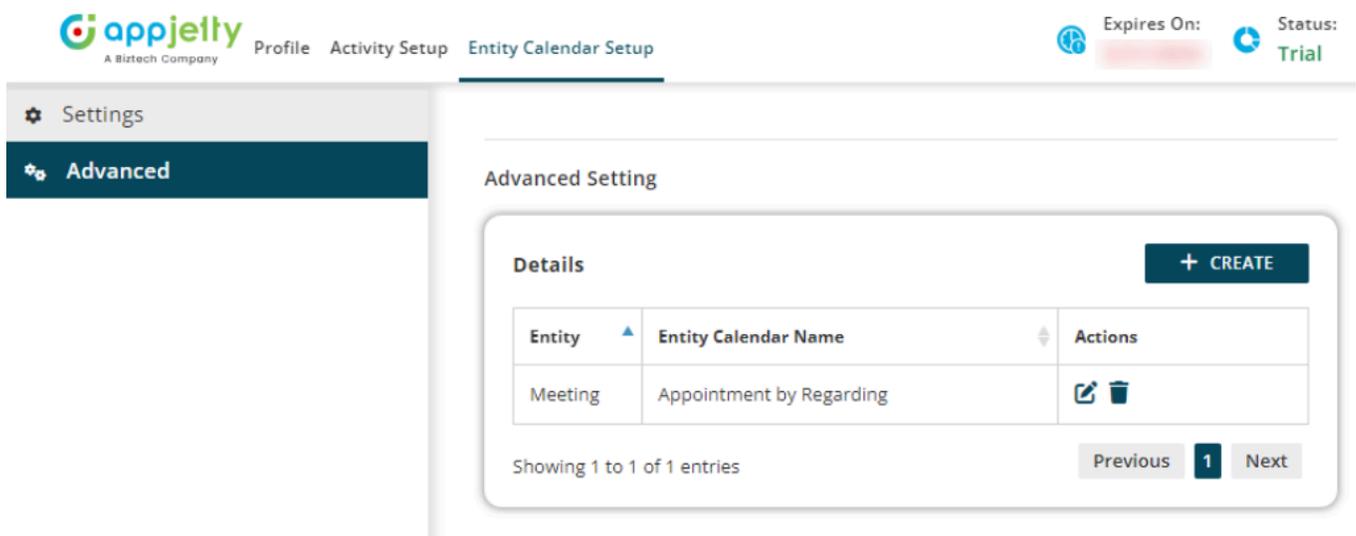
Once the appointment is booked Appointment Summary will be shown.



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**.



The screenshot shows the Appjetty user interface for the 'Entity Calendar Setup' configuration page. The top navigation bar includes the Appjetty logo, 'Profile', 'Activity Setup', and 'Entity Calendar Setup'. On the right, there are 'Expires On' and 'Status: Trial' indicators. A left sidebar contains 'Settings' and 'Advanced' options, with 'Advanced' selected. The main content area is titled 'Advanced Setting' and features a 'Details' section with a '+ CREATE' button. Below this is a table with columns for 'Entity', 'Entity Calendar Name', and 'Actions'. The table contains one entry: 'Meeting' with the name 'Appointment by Regarding' and edit/delete icons. At the bottom, it shows 'Showing 1 to 1 of 1 entries' and pagination controls for 'Previous', '1', and 'Next'.

Entity	Entity Calendar Name	Actions
Meeting	Appointment by Regarding	 

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.

Filter By

Contact

Filter By

Regarding

Regarding Entity

account

account

adx_ad

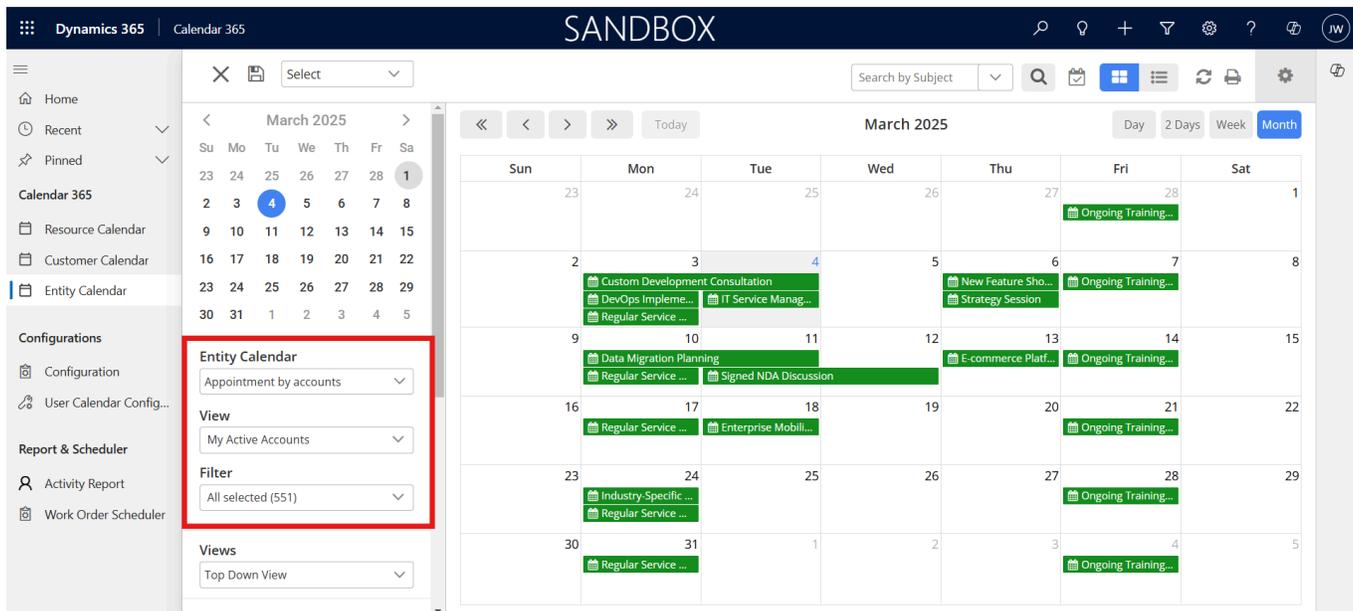
adx_adplacement

adx_invitation

adx_poll

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.



The screenshot shows the Dynamics 365 Entity Calendar interface. The left sidebar contains navigation options like Home, Recent, Pinned, and various calendars. The main area displays a calendar for March 2025 with various events. A red box highlights the 'Entity Calendar' section in the sidebar, which includes a dropdown for 'Appointment by accounts', a 'View' dropdown set to 'My Active Accounts', a 'Filter' dropdown set to 'All selected (551)', and a 'Views' dropdown set to 'Top Down View'.

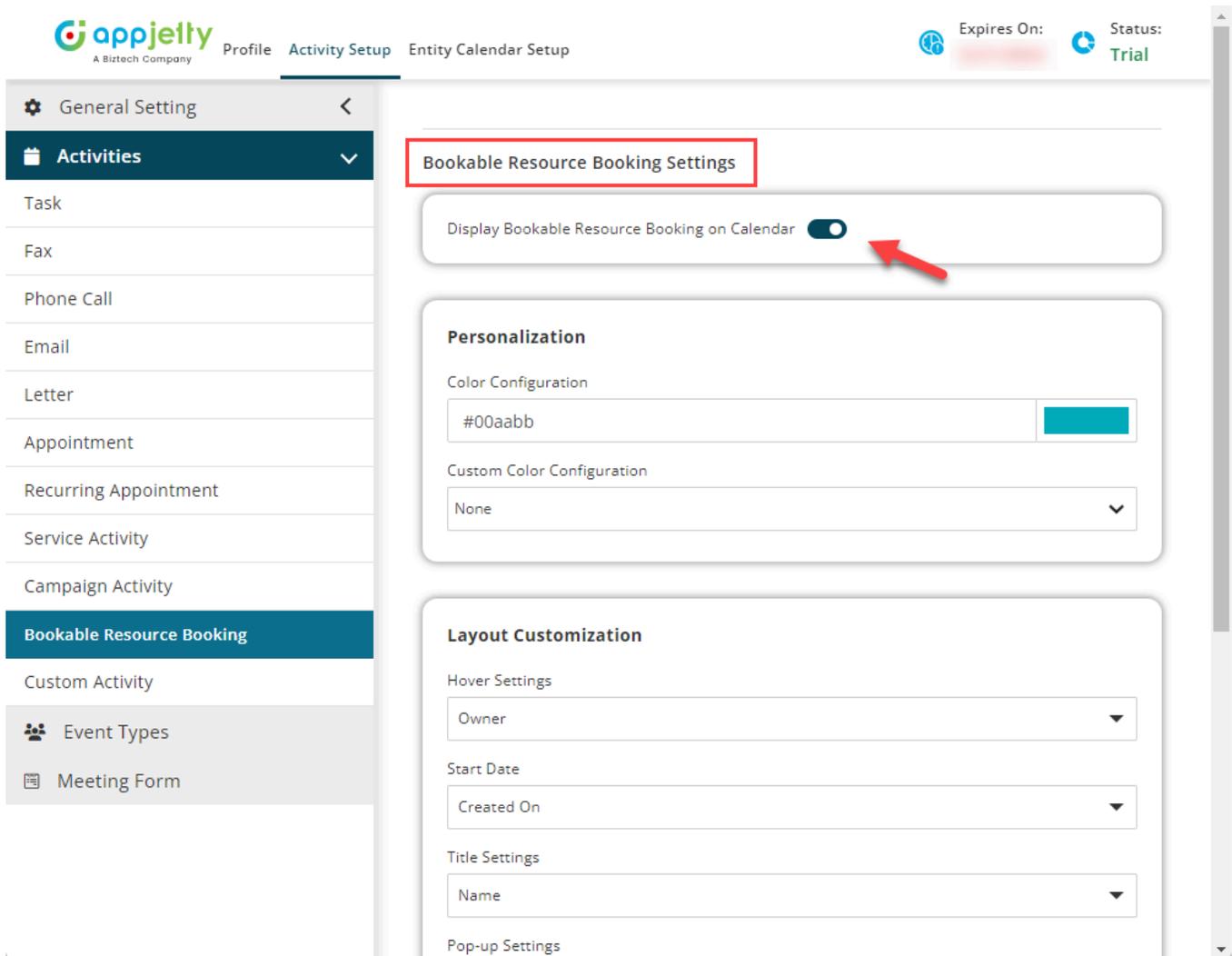
Now once the **View** is selected, the **Filter** section will be listed as per the selection of the **View**.

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.

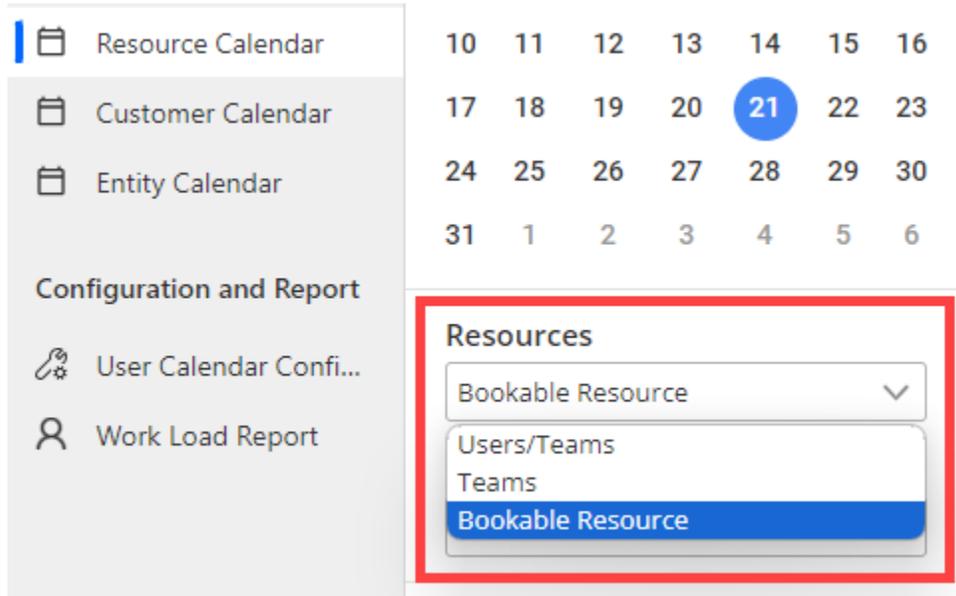
In order to do so, navigate to **Configurations -> Activity Setup -> Activities -> Bookable Resource Booking**.

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



The screenshot shows the Appjelly CRM configuration interface. The top navigation bar includes the Appjelly logo, 'Profile', 'Activity Setup', and 'Entity Calendar Setup'. On the right, there are indicators for 'Expires On' and 'Status: Trial'. The left sidebar contains a menu with 'General Setting' and 'Activities' (expanded). Under 'Activities', there are options for Task, Fax, Phone Call, Email, Letter, Appointment, Recurring Appointment, Service Activity, Campaign Activity, **Bookable Resource Booking** (highlighted), Custom Activity, Event Types, and Meeting Form. The main content area is titled 'Bookable Resource Booking Settings' (highlighted with a red box). It features a toggle switch for 'Display Bookable Resource Booking on Calendar', which is currently turned on and indicated by a red arrow. Below this are sections for 'Personalization' (Color Configuration with a color picker set to #00aabb and a 'None' dropdown for Custom Color Configuration) and 'Layout Customization' (Hover Settings with a dropdown set to 'Owner', Start Date with a dropdown set to 'Created On', Title Settings with a dropdown set to 'Name', and Pop-up Settings).

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



The screenshot shows a sidebar menu on the left with options: Resource Calendar, Customer Calendar, Entity Calendar, Configuration and Report, User Calendar Confi..., and Work Load Report. The main area displays a calendar grid for the month of October, with the 21st highlighted in blue. Below the calendar, a 'Resources' dropdown menu is open, showing options: Bookable Resource (selected), Users/Teams, and Teams. The 'Bookable Resource' option is highlighted in blue.

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.

+ Create an Activity



Name *

Start Date * 

End Date * 

Duration 

Work Order * 

Resource * 

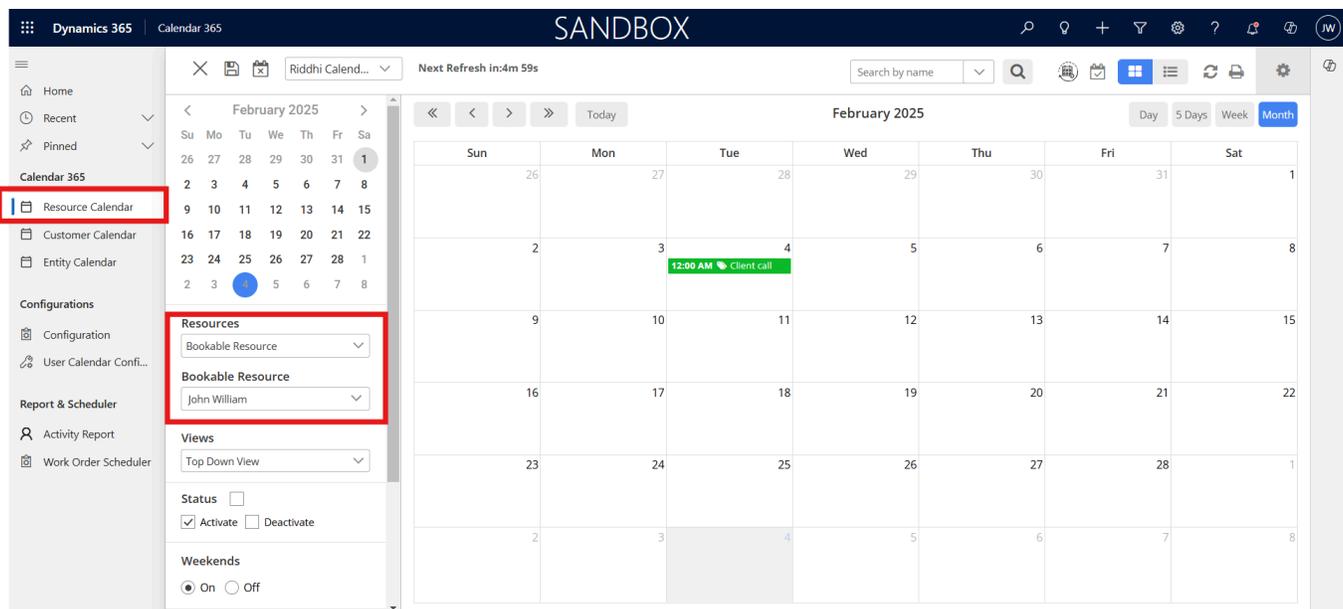
Booking Status * 

Booking type 

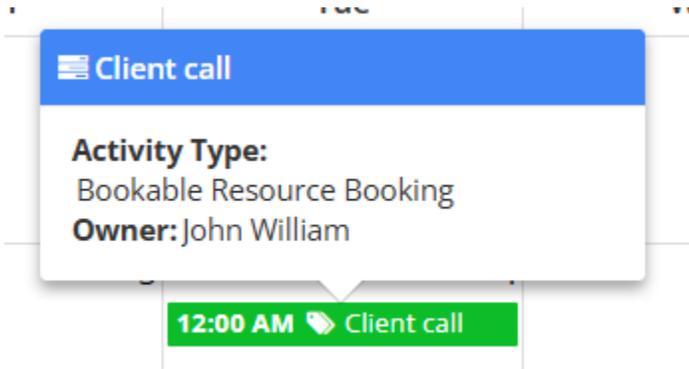
Owner Michael Smith

CREATE

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

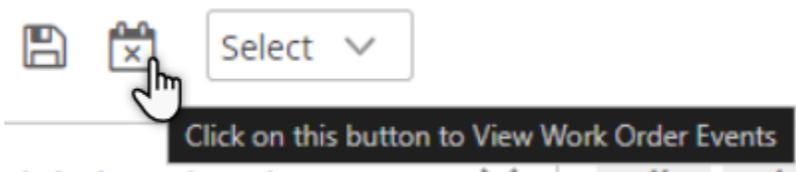


The screenshot shows the Dynamics 365 interface in a 'SANDBOX' environment. The left-hand navigation pane includes sections for 'Calendar 365' (with 'Resource Calendar' highlighted), 'Configurations', and 'Report & Scheduler'. The main area displays a calendar for February 2025. A resource calendar for 'John William' is active, showing a 'Client call' activity on Tuesday, February 4th, 2025, from 12:00 AM to 12:00 AM. The interface includes standard navigation and search tools at the top.

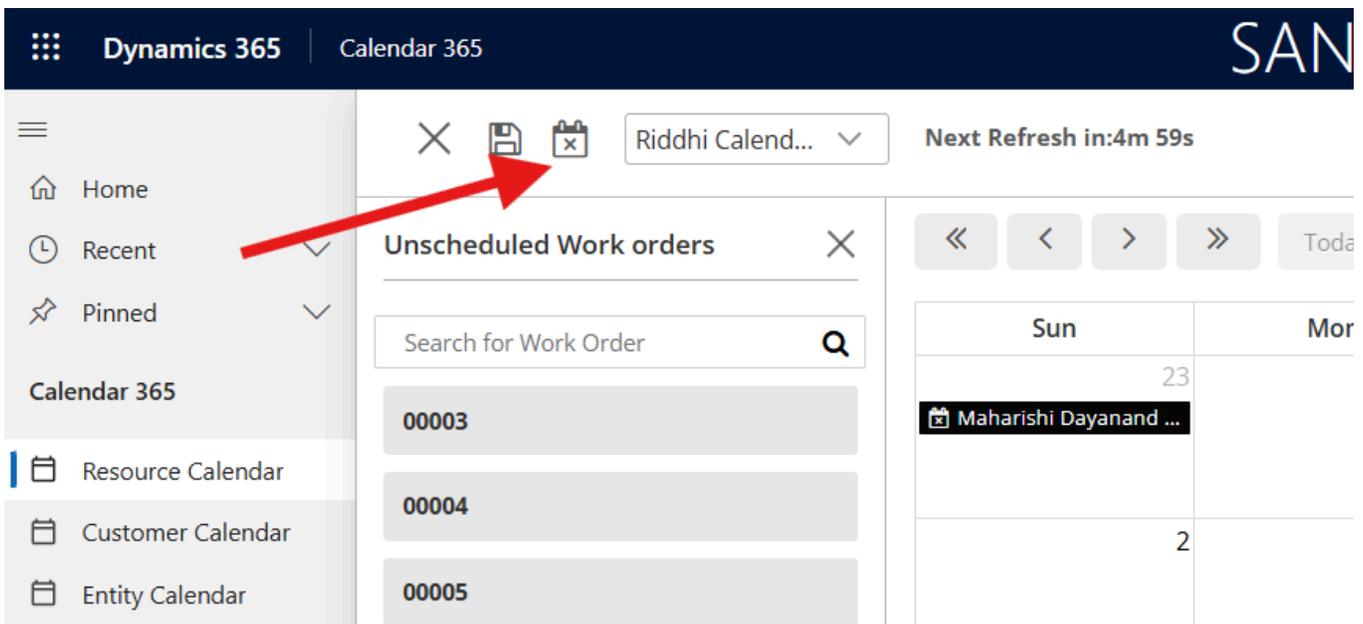


Unscheduled Work Orders

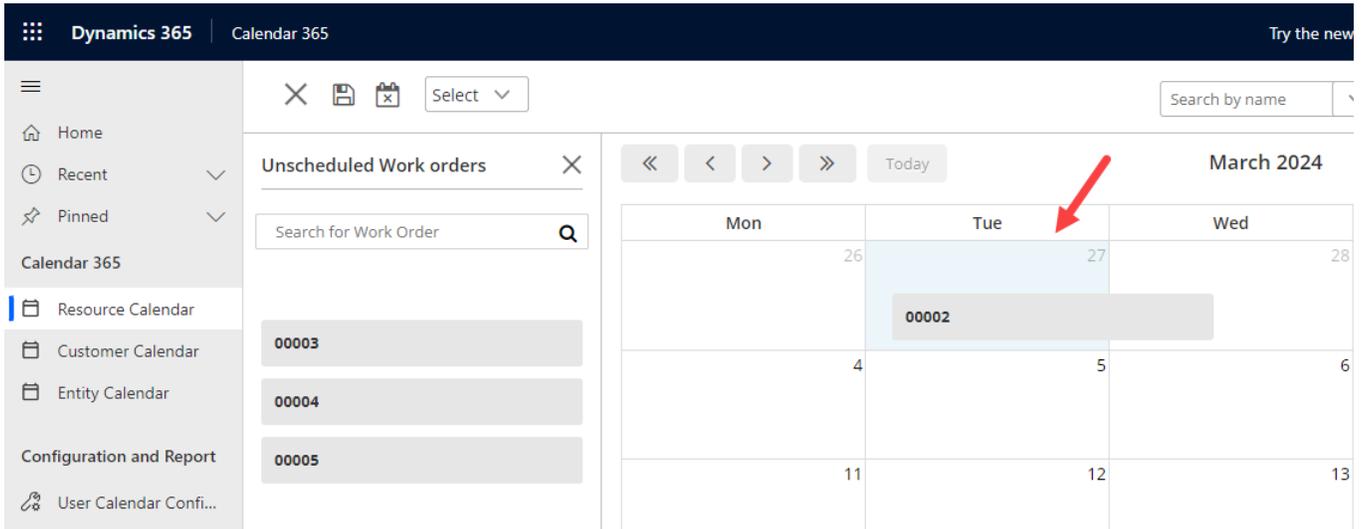
All the unscheduled work orders can be viewed by clicking on the Calendar Icon displayed on the top left side of the page.



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.



Dynamics 365 | Calendar 365 Try the new

Home, Recent, Pinned, **Calendar 365**, Resource Calendar, Customer Calendar, Entity Calendar, Configuration and Report, User Calendar Confi...

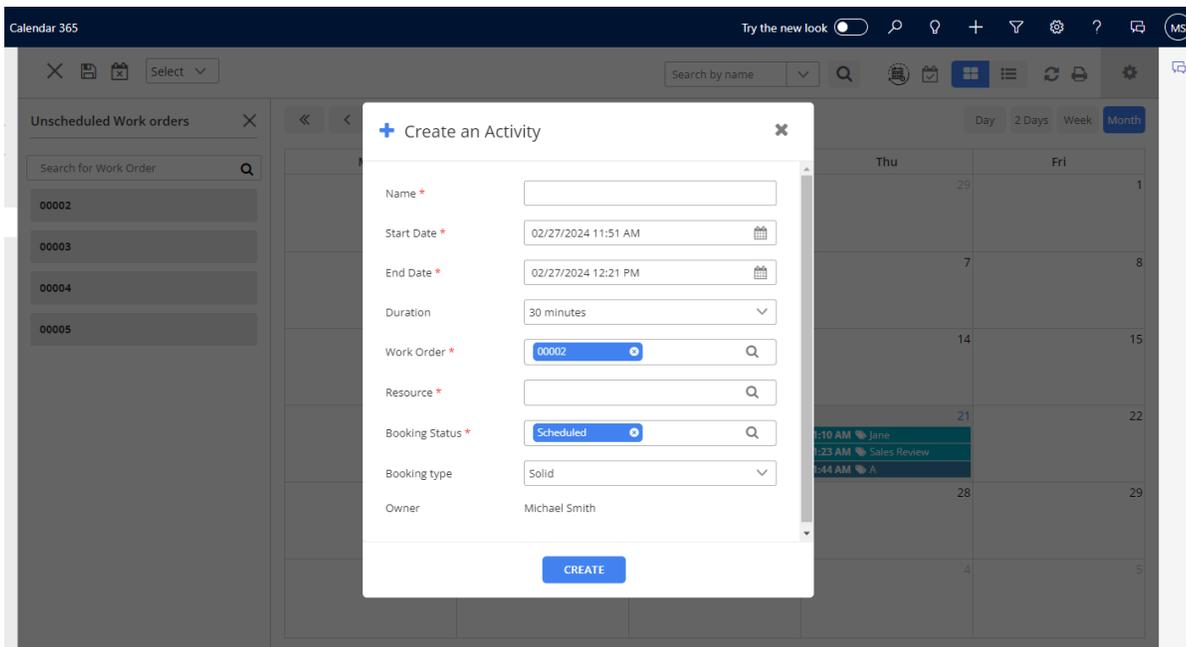
Unscheduled Work orders

Search for Work Order

- 00003
- 00004
- 00005

Calendar: March 2024

Mon	Tue	Wed
26	27 00002	28
4	5	6
11	12	13



Calendar 365 Try the new look

Unscheduled Work orders

Search for Work Order

- 00002
- 00003
- 00004
- 00005

+ Create an Activity

Name *

Start Date * 02/27/2024 11:51 AM

End Date * 02/27/2024 12:21 PM

Duration 30 minutes

Work Order * 00002

Resource *

Booking Status * Scheduled

Booking type Solid

Owner Michael Smith

CREATE

Calendar: Day 2 Days Week Month

Thu	Fri
29	1
7	8
14	15
21	22
28	29
6	5

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.

Calendar 365 Try the new look MS

Search by name

Unscheduled Work orders

Search for Work Order

- 00003
- 00004
- 00005

February 2024 Day 2 Days Week Month

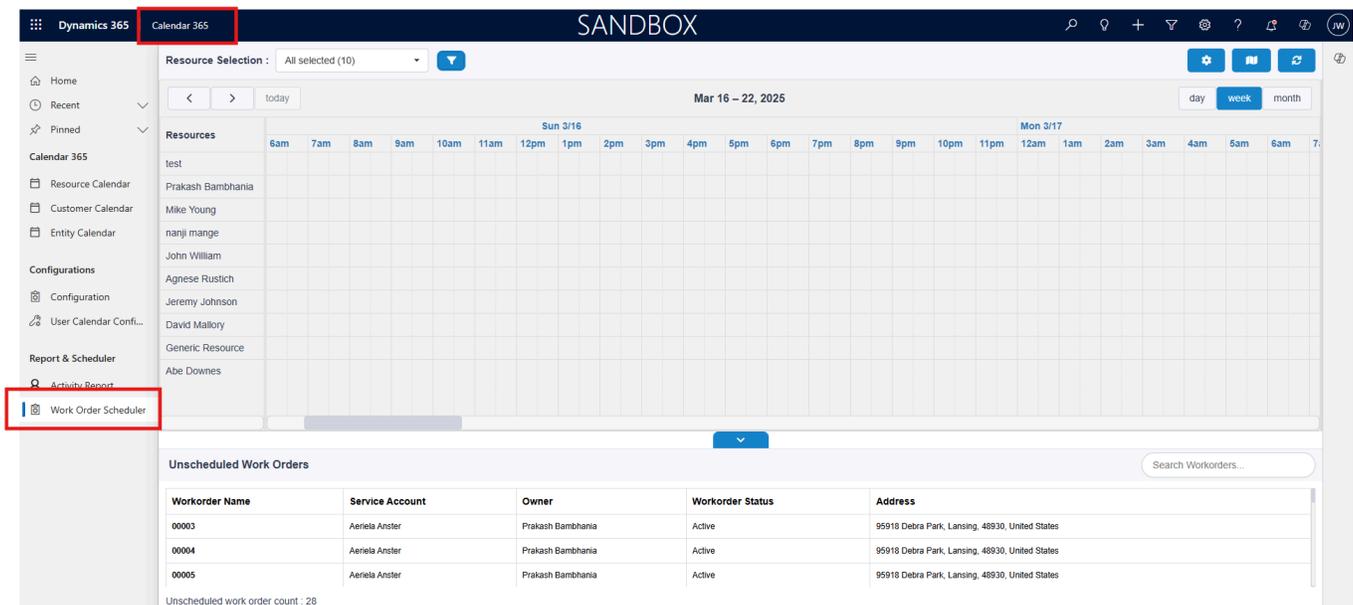
Mon	Tue	Wed	Thu	Fri
29	30	31	1	2
5	6	7	8	9
12	13	14	15	16
19	20	21	22	23
26	27	28	29	1
4	5	6	7	8

11:51 AM Product Demo



Work order scheduler

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.



The screenshot displays the Dynamics 365 Work Order Scheduler interface. The top navigation bar includes 'Dynamics 365' and 'Calendar 365'. The main area shows a calendar for 'Mar 16 - 22, 2025' with resources listed on the left. The 'Work Order Scheduler' menu item is highlighted in the left sidebar. Below the calendar is a table of 'Unscheduled Work Orders'.

Workorder Name	Service Account	Owner	Workorder Status	Address
00003	Aerielia Anster	Prakash Bambhania	Active	95918 Debra Park, Lansing, 48930, United States
00004	Aerielia Anster	Prakash Bambhania	Active	95918 Debra Park, Lansing, 48930, United States
00005	Aerielia Anster	Prakash Bambhania	Active	95918 Debra Park, Lansing, 48930, United States

Unscheduled work order count : 28

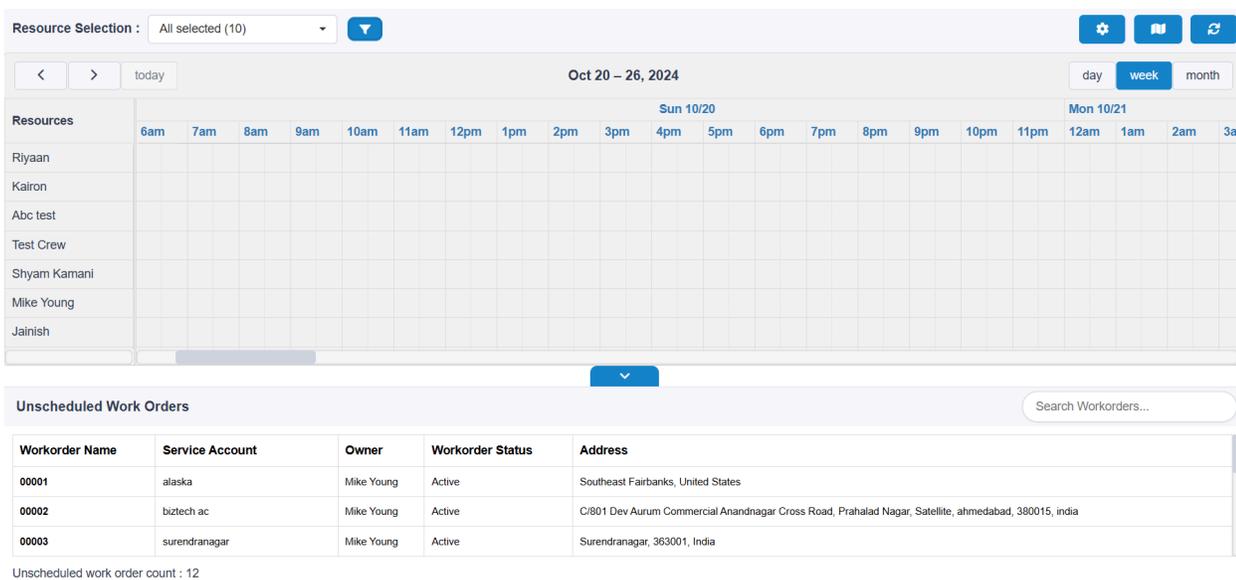
Note:

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**.



The screenshot displays the Dynamics 365 Work Order Scheduler interface. The top navigation bar includes 'Resource Selection : All selected (10)'. The main area shows a calendar for 'Oct 20 - 26, 2024' with resources listed on the left. Below the calendar is a table of 'Unscheduled Work Orders'.

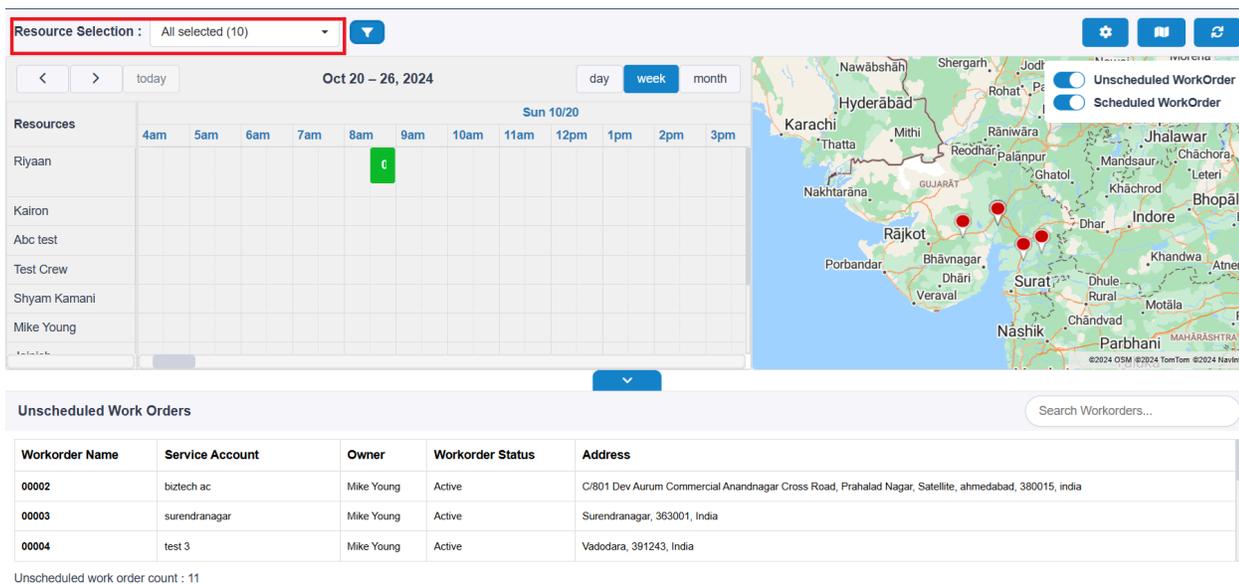
Workorder Name	Service Account	Owner	Workorder Status	Address
00001	alaska	Mike Young	Active	Southeast Fairbanks, United States
00002	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India

Unscheduled work order count : 12

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



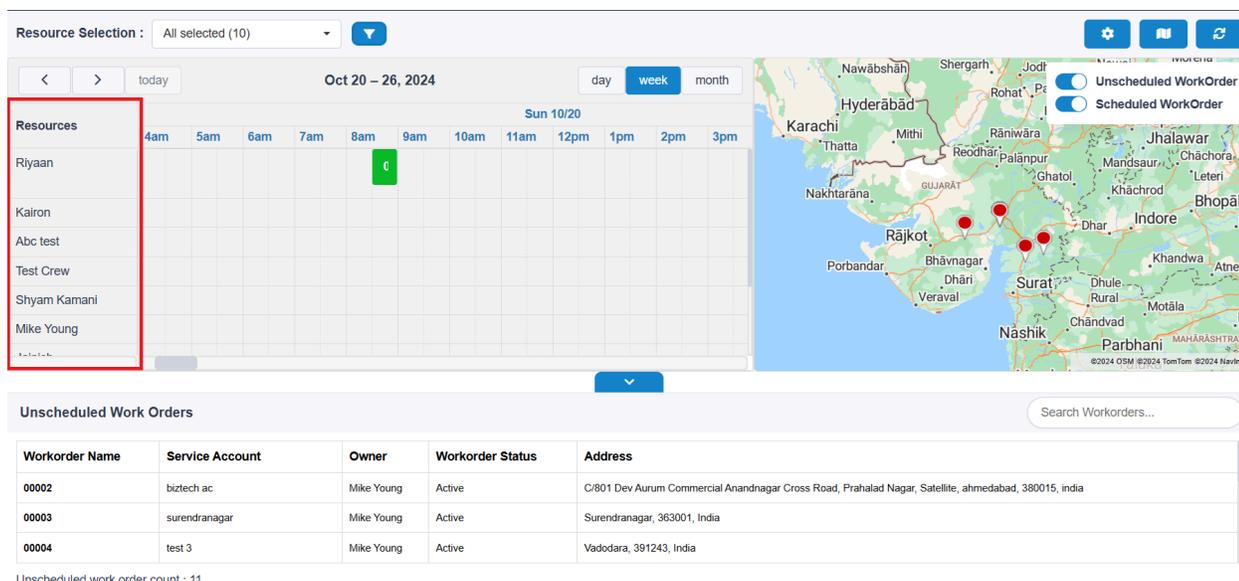
The screenshot shows the Resource Management interface. At the top, there is a 'Resource Selection' dropdown menu with 'All selected (10)' and a filter icon. Below this is a calendar view for 'Sun 10/20' with a grid of time slots from 4am to 3pm. A resource named 'Riyaan' has a booking at 8am. To the right is a map showing various locations in India with red markers. Below the calendar and map is a table of 'Unscheduled Work Orders' with columns for Workorder Name, Service Account, Owner, Workorder Status, and Address. The table contains three rows of data.

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 : 11

The

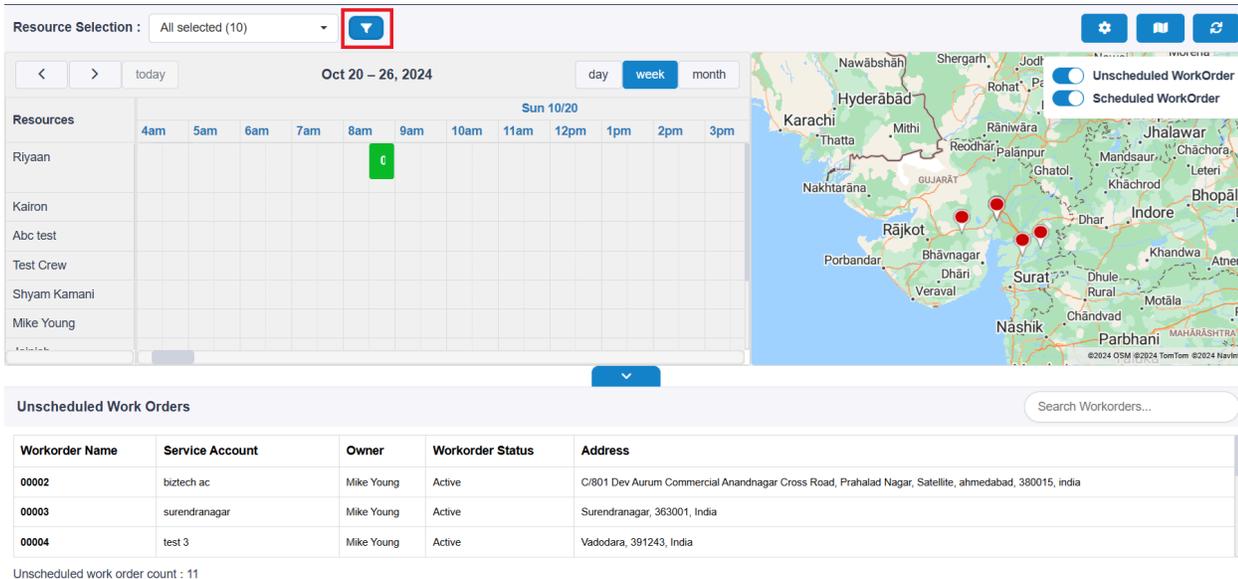
Resource Selection Field is a multi-select option that lists all available users. Users can choose one or multiple resources from this list. Once selected, these resources are displayed in the Calendar Resource Section for easy scheduling and management.



This screenshot is identical to the previous one, but with a red rectangular box highlighting the 'Resources' list on the left side of the calendar. The list includes: Riyaan, Kairon, Abc test, Test Crew, Shyam Kamani, and Mike Young.

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

configuration settings.

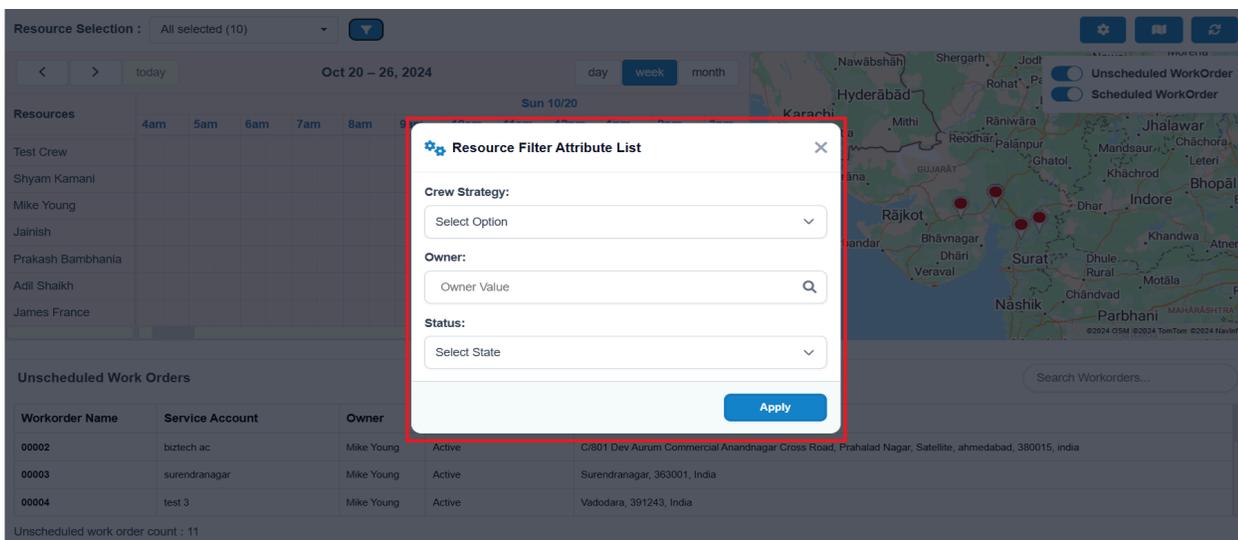


The screenshot shows the 'Resource Selection' dropdown set to 'All selected (10)'. A red box highlights the 'Apply' button next to it. Below is a calendar view for 'Oct 20 - 26, 2024' with a resource grid. A map on the right shows work order locations in India. Below the calendar is a table of 'Unscheduled Work Orders'.

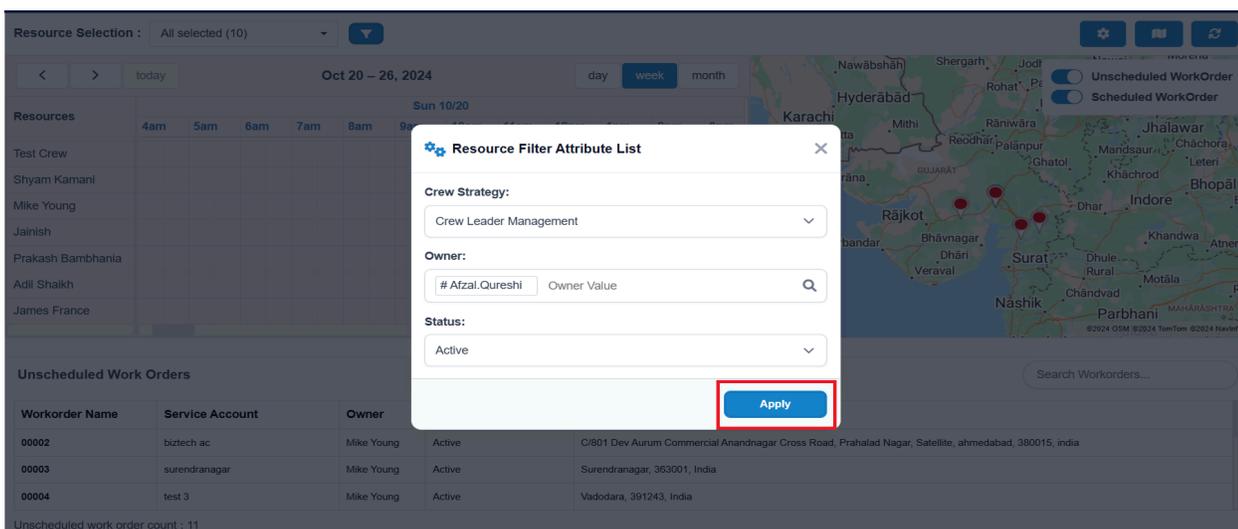
Workorder Name	Service Account	Owner	Workorder Status	Address
00002	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India
00004	test 3	Mike Young	Active	Vadodara,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

Unscheduled work order count : 11

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.



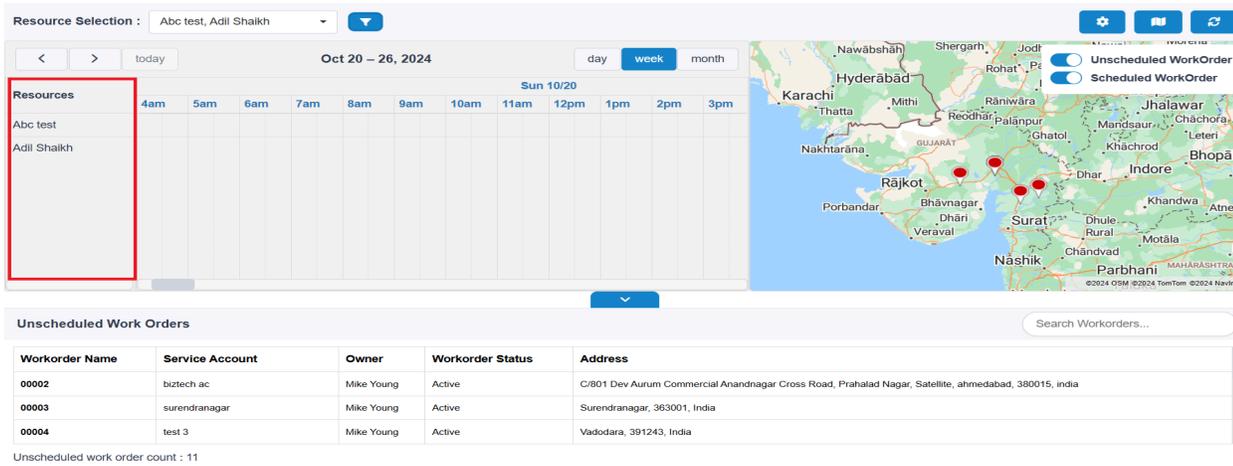
The screenshot shows the 'Resource Filter Attribute List' dialog box open over the resource calendar. The dialog has three filter fields: 'Crew Strategy' (set to 'Select Option'), 'Owner' (set to 'Owner Value'), and 'Status' (set to 'Select State'). An 'Apply' button is at the bottom right of the dialog.



The screenshot shows the 'Resource Filter Attribute List' dialog box with the 'Apply' button highlighted by a red box. The background shows the resource calendar with filtered results. The 'Unscheduled Work Orders' table below the calendar shows the same three work orders as in the previous screenshot.

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 : 11



Resource Selection :

today Oct 20 – 26, 2024 day week month

Sun 10/20

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Abc test												
Adli Shaikh												

Unscheduled Work Orders

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 : 11

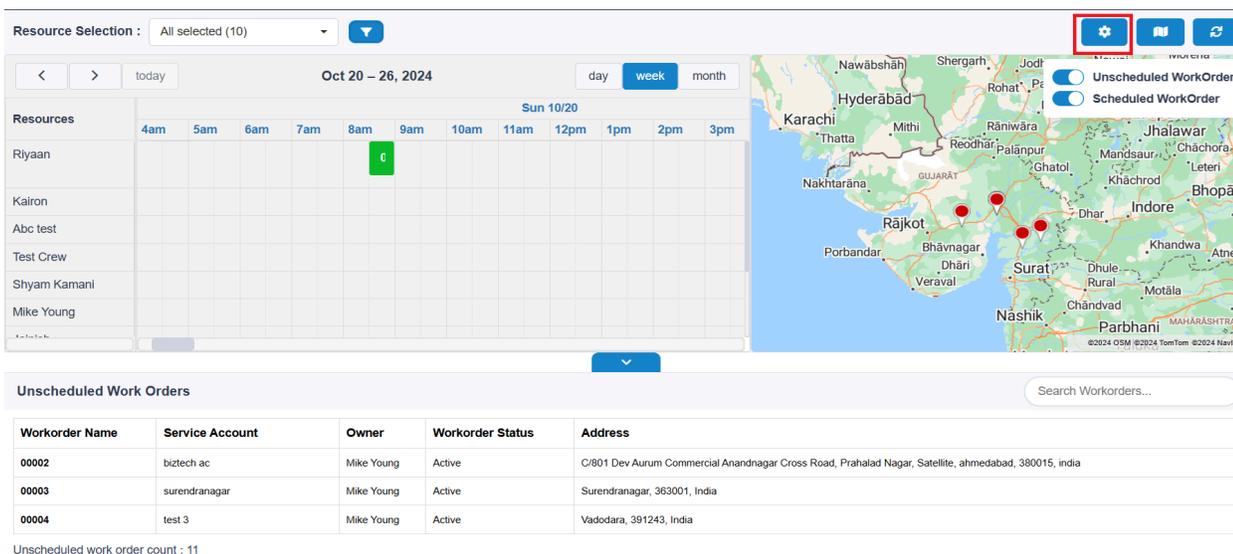
To manage filter fields efficiently, users can access Configuration Settings from the Settings menu.

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.



Resource Selection :

today Oct 20 – 26, 2024 day week month

Sun 10/20

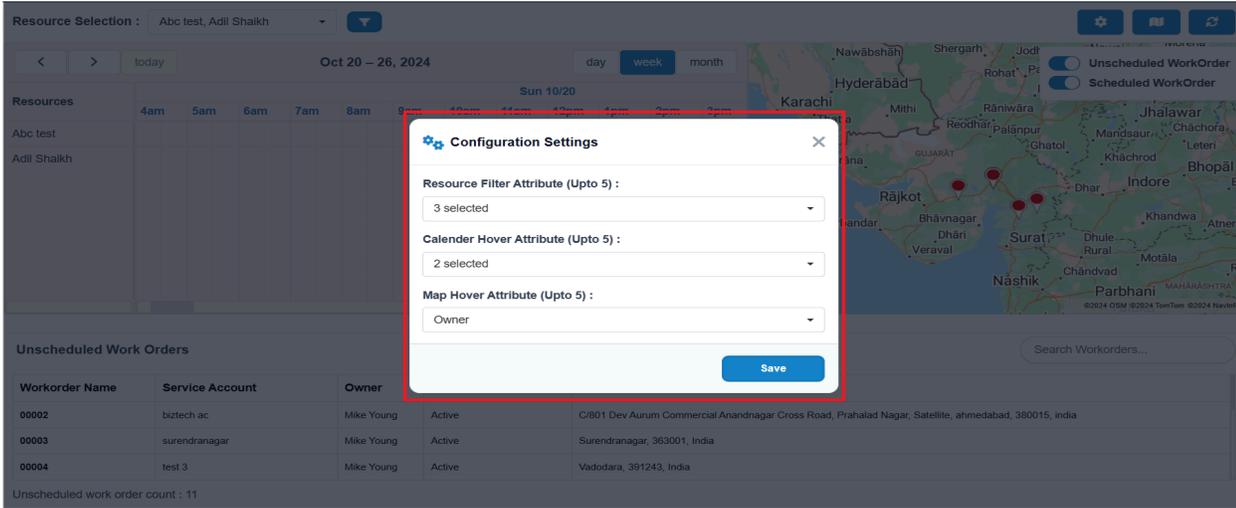
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Riyaan												
Kairon												
Abc test												
Test Crew												
Shyam Kamani												
Mike Young												

Unscheduled Work Orders

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 : 11

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.



Resource Selection : **Abc test, Adil Shaikh**

Oct 20 – 26, 2024

Sun 10/20

Resources

Abc test

Adil Shaikh

Configuration Settings

Resource Filter Attribute (Upto 5) :

3 selected

Calendar Hover Attribute (Upto 5) :

2 selected

Map Hover Attribute (Upto 5) :

Owner

Save

Unscheduled Work Orders

Workorder Name	Service Account	Owner	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 : 11

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.

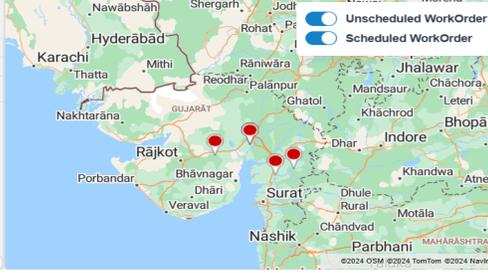
These toggle switches allow users to control which work orders are visible on the map, ensuring a customized and efficient view.

Resource Selection : [Filter]

today Oct 20 – 26, 2024 [day] [week] [month]

Sun 10/20

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Abc test												
Adli Shaikh												



Unscheduled WorkOrder
 Scheduled WorkOrder

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

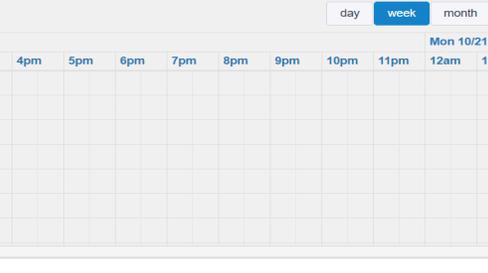
Unscheduled work order count : 11

Resource Selection : [Filter]

today Oct 20 – 26, 2024 [day] [week] [month]

Sun 10/20 Mon 10/21

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	12am	1a
Riyaan																						
Kairon																						
Abc test																						
Test Crew																						
Shyam Kamani																						
Mike Young																						
Jainish																						



Unscheduled WorkOrder
 Scheduled WorkOrder

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

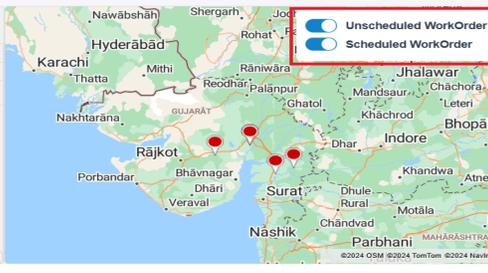
Unscheduled work order count : 11

Resource Selection : [Filter]

today Oct 20 – 26, 2024 [day] [week] [month]

Sun 10/20

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Abc test												
Adli Shaikh												



Unscheduled WorkOrder
 Scheduled WorkOrder

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 : 11

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.

Resource Selection : All selected (10)

Oct 20 – 26, 2024

Sun 10/20

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhania												
Adil Shaikh												
James France												

Map of Ahmedabad showing work order locations. Legend: Unscheduled WorkOrder, Scheduled WorkOrder

Unscheduled Work Orders

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

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

Resource Selection : All selected (10)

Oct 20 – 26, 2024

Sun 10/20

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhania												
Adil Shaikh												
James France												

Map of Ahmedabad showing work order locations. Legend: Unscheduled WorkOrder, Scheduled WorkOrder

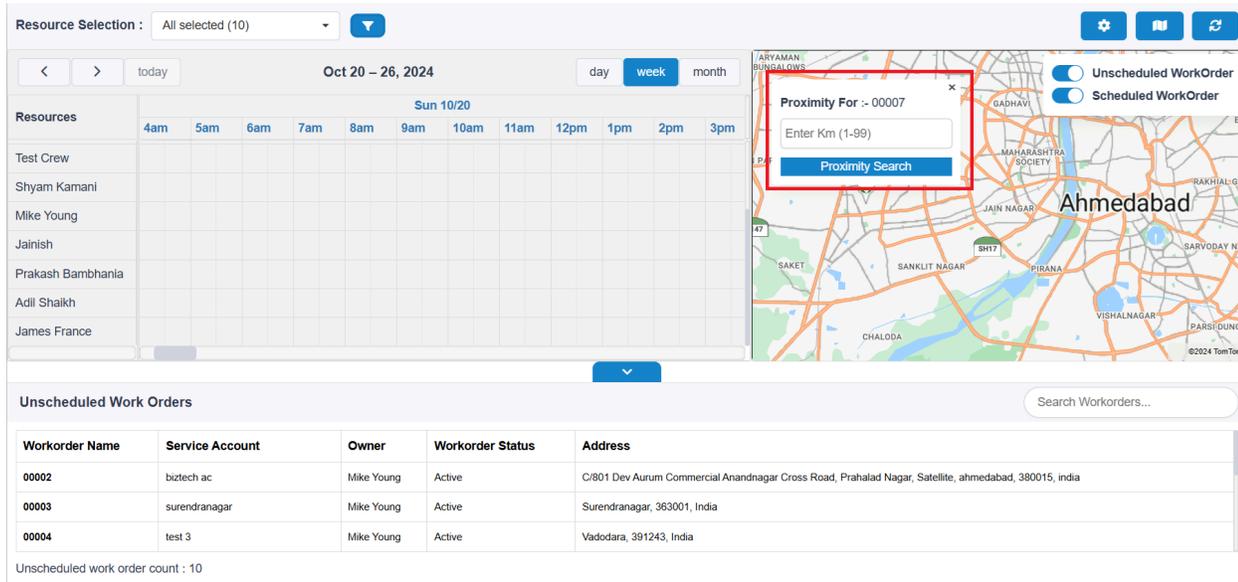
Unscheduled Work Orders

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

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:



Resource Selection : All selected (10)

Oct 20 – 26, 2024

Resources

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhanla												
Adil Shaikh												
James France												

Proximity For :- 00007

Enter Km (1-99)

Proximity Search

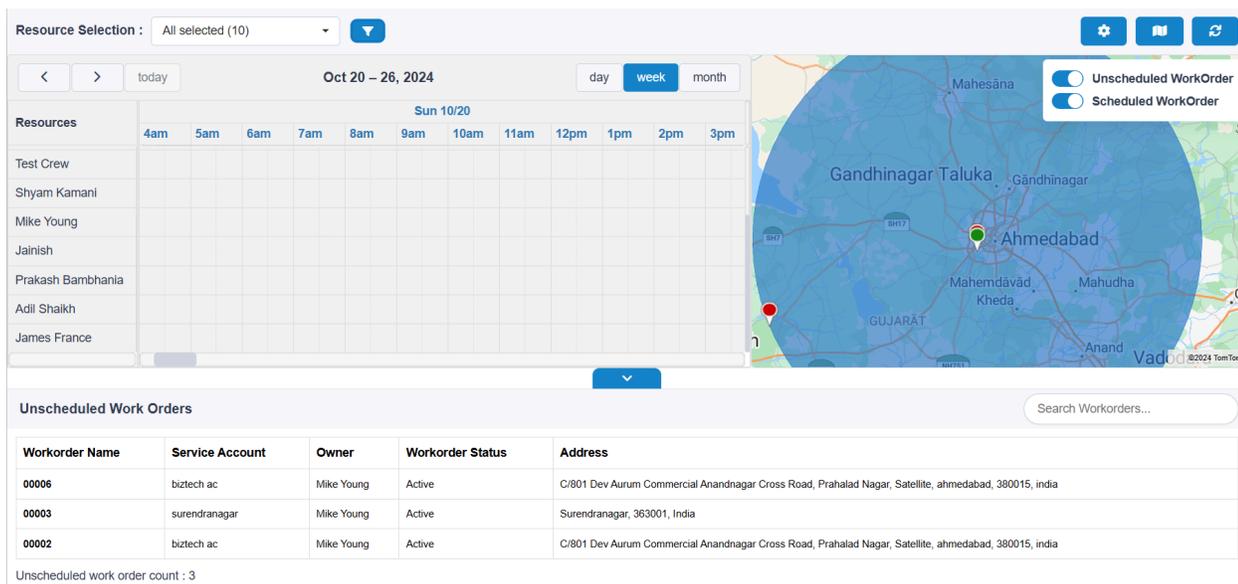
Unscheduled Work Orders

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 : 0

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.



Resource Selection : All selected (10)

Oct 20 – 26, 2024

Resources

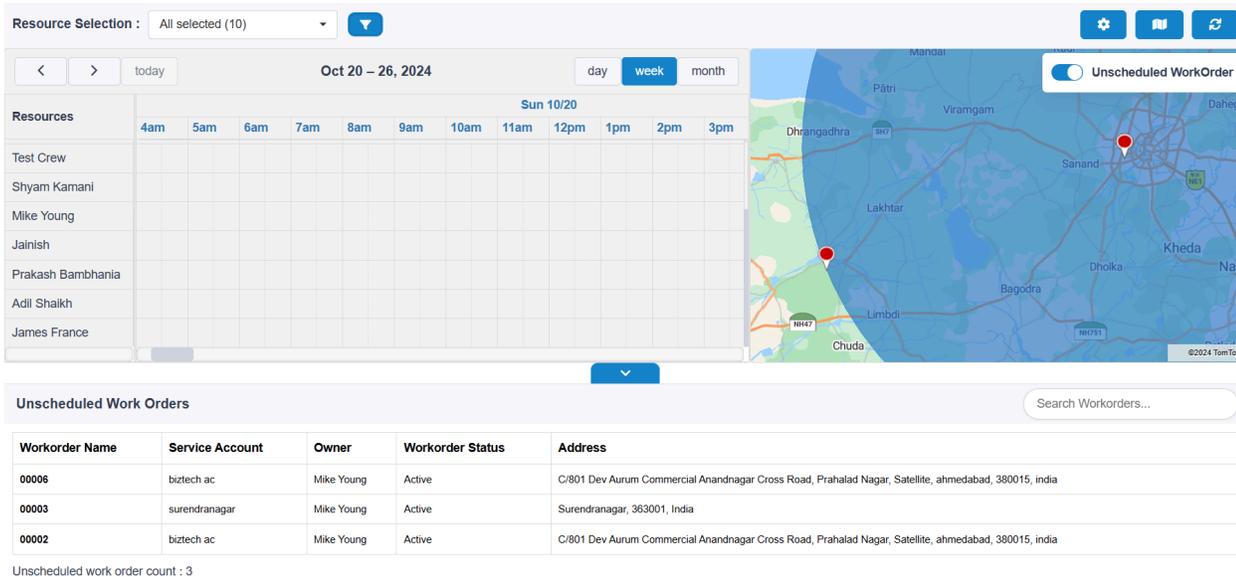
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhanla												
Adil Shaikh												
James France												

Unscheduled Work Orders

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 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.



Resource Selection : All selected (10)

Oct 20 – 26, 2024

Sun 10/20

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhania												
Adil Shaikh												
James France												

Unscheduled Work Orders

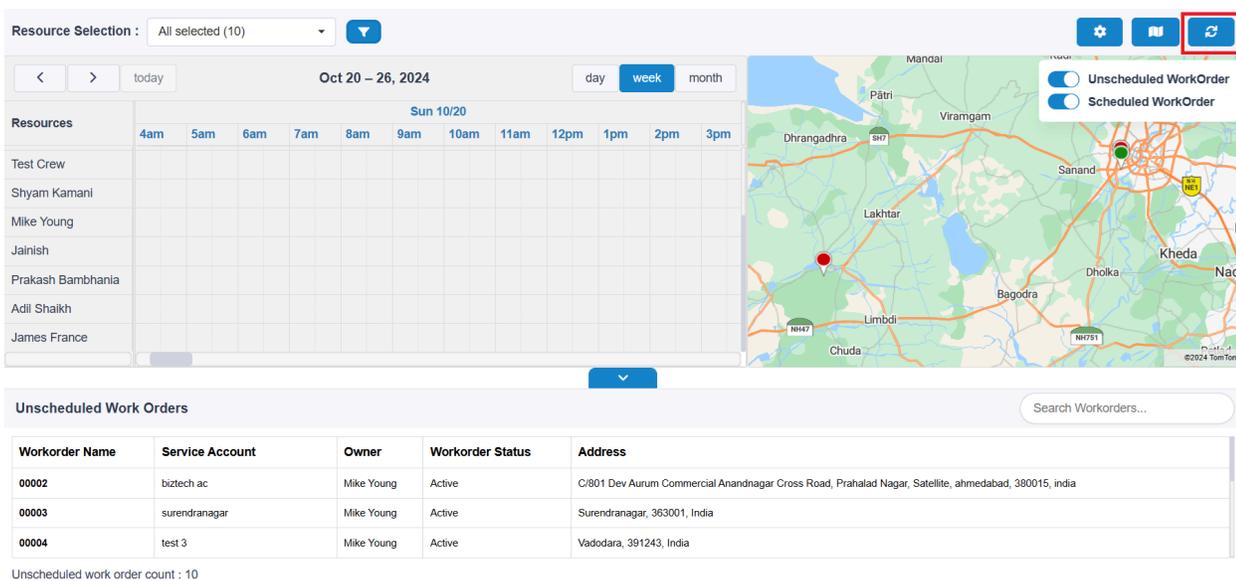
Workorder Name	Service Account	Owner	Workorder Status	Address
00006	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India
00002	biztech ac	Mike Young	Active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

Unscheduled work order count : 3

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.



Resource Selection : All selected (10)

Oct 20 – 26, 2024

Sun 10/20

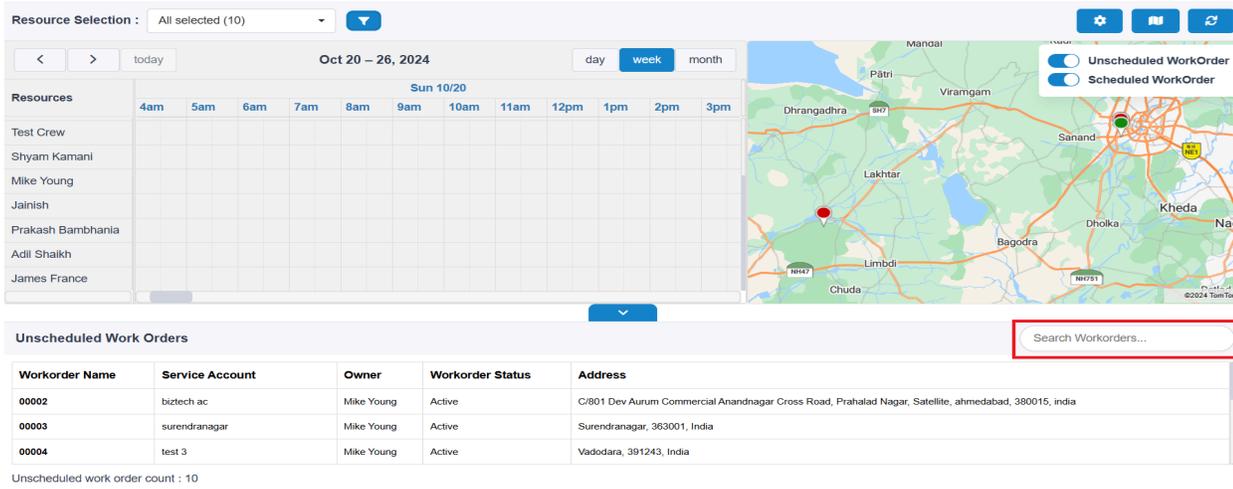
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhania												
Adil Shaikh												
James France												

Unscheduled Work Orders

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

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.



Resource Selection : All selected (10)

Oct 20 – 26, 2024

Resources: Test Crew, Shyam Kamani, Mike Young, Jainish, Prakash Bambhanja, Adil Shaikh, James France

Map: Dhrangadhra, Viramgam, Sanand, Lakhtar, Dholka, Kheda, Nadi, Bagodra, Limbdi, Chuda

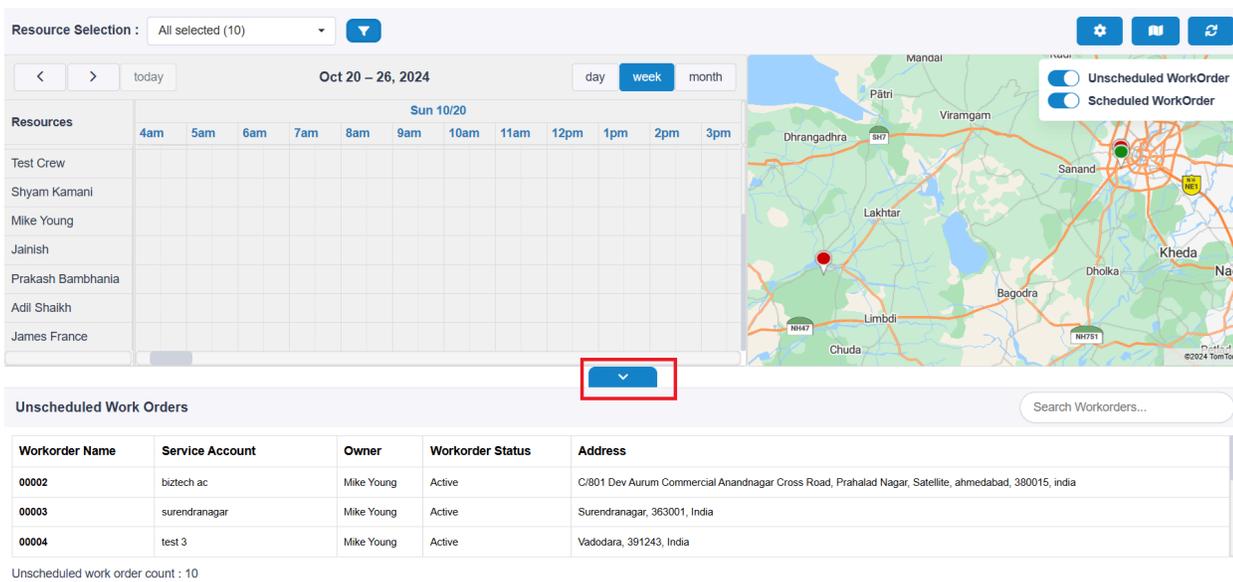
Unscheduled Work Orders

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

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.



Resource Selection : All selected (10)

Oct 20 – 26, 2024

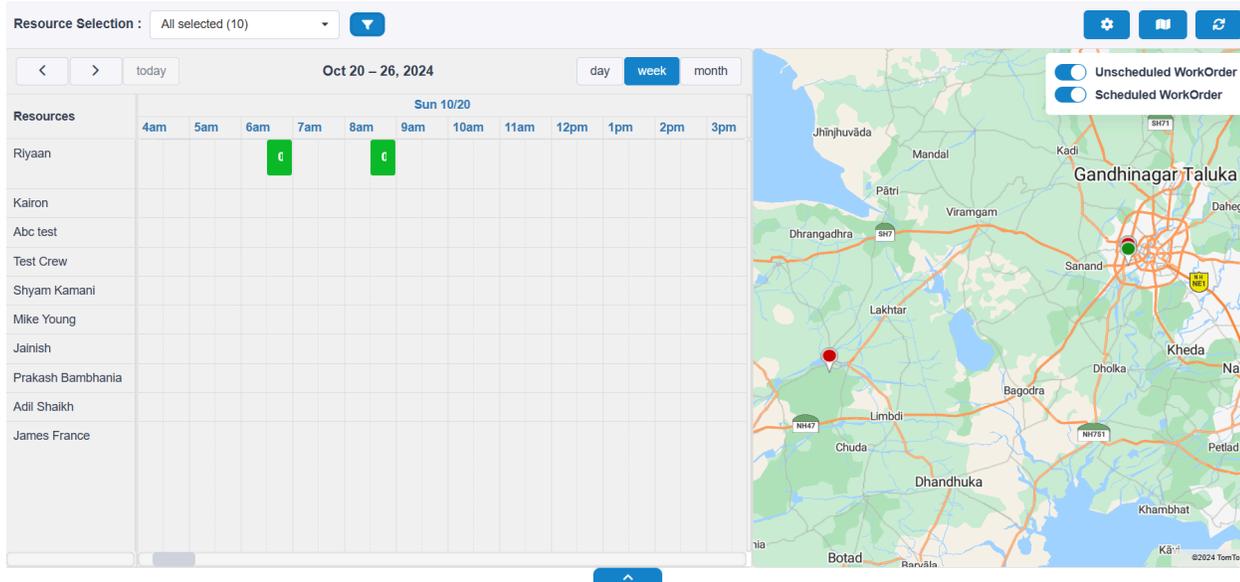
Resources: Test Crew, Shyam Kamani, Mike Young, Jainish, Prakash Bambhanja, Adil Shaikh, James France

Map: Dhrangadhra, Viramgam, Sanand, Lakhtar, Dholka, Kheda, Nadi, Bagodra, Limbdi, Chuda

Unscheduled Work Orders

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



Resource Selection : All selected (10)

Oct 20 – 26, 2024

Sun 10/20

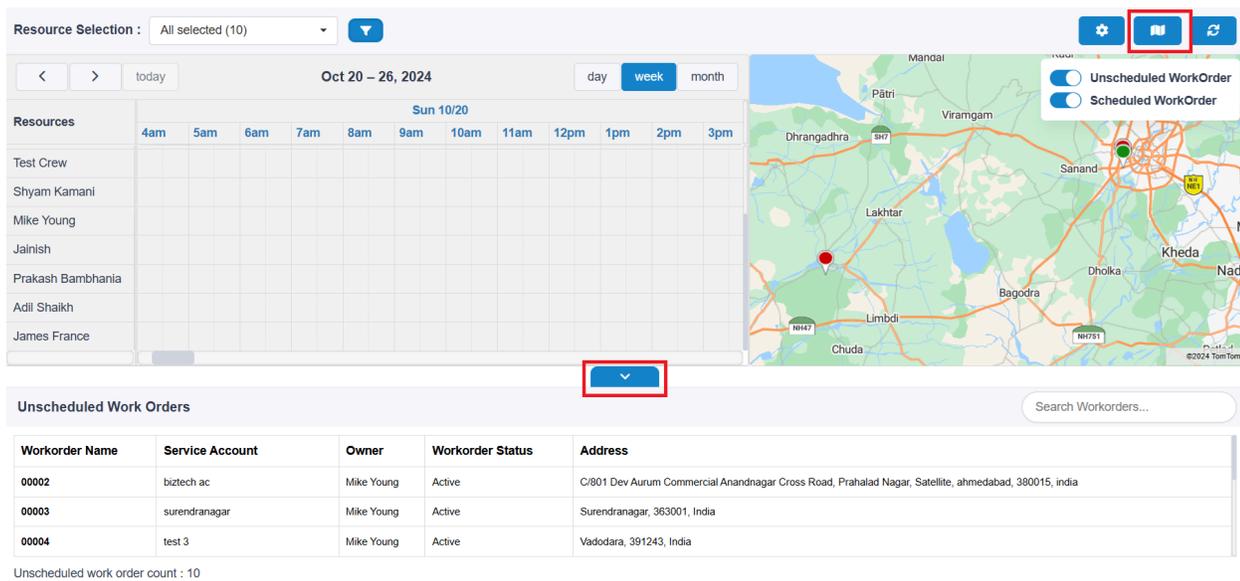
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Riyaan			0		0							
Kairon												
Abc test												
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhania												
Adil Shaikh												
James France												

Map: Gandhinagar Taluka

Map Legend: Unscheduled WorkOrder, Scheduled WorkOrder

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.



Resource Selection : All selected (10)

Oct 20 – 26, 2024

Sun 10/20

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhania												
Adil Shaikh												
James France												

Map: Gandhinagar Taluka

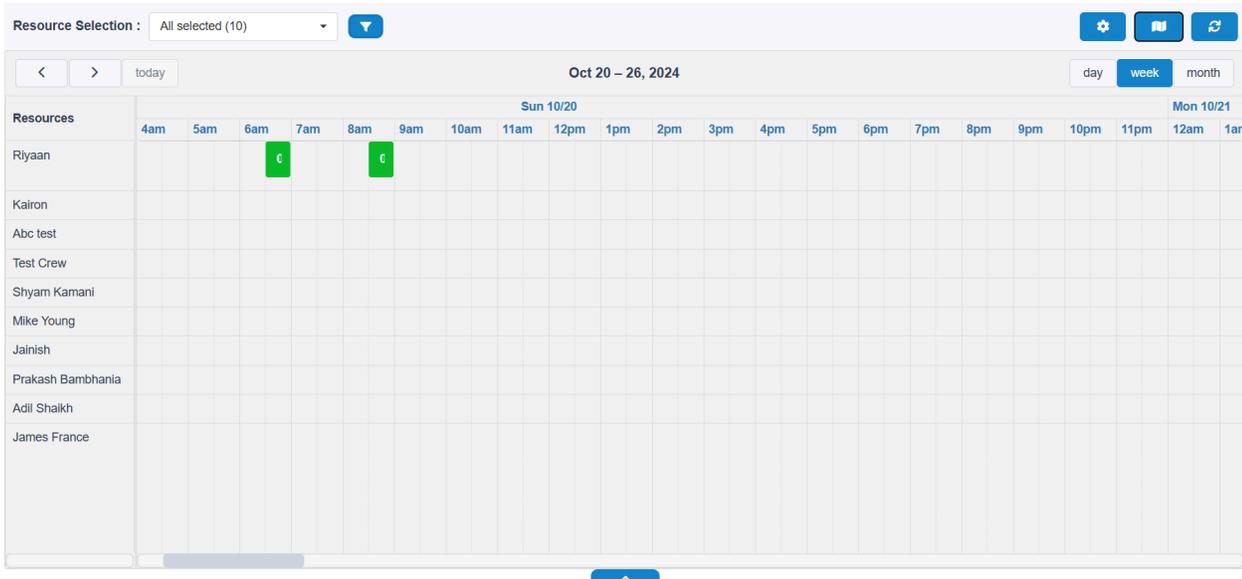
Map Legend: Unscheduled WorkOrder, Scheduled WorkOrder

Unscheduled Work Orders

Search Workorders...

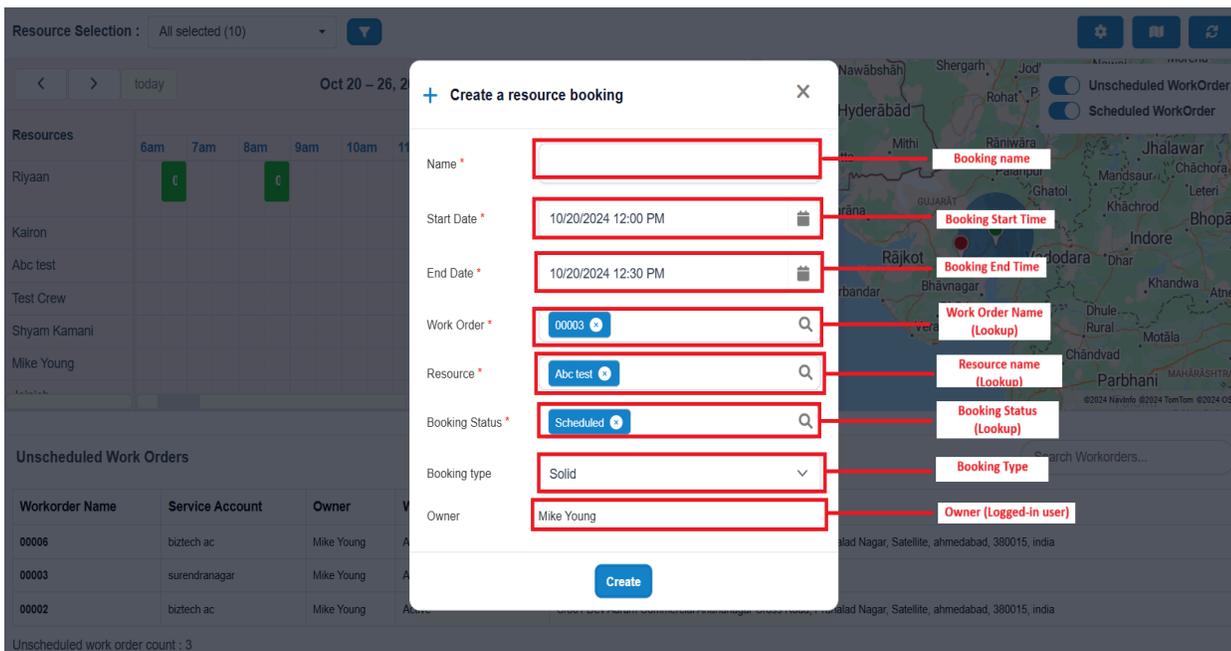
Workorder Name	Service Account	Owner	Workorder Status	Address
00002	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India
00004	test 3	Mike Young	Active	Vadodara,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

Unscheduled work order count : 10



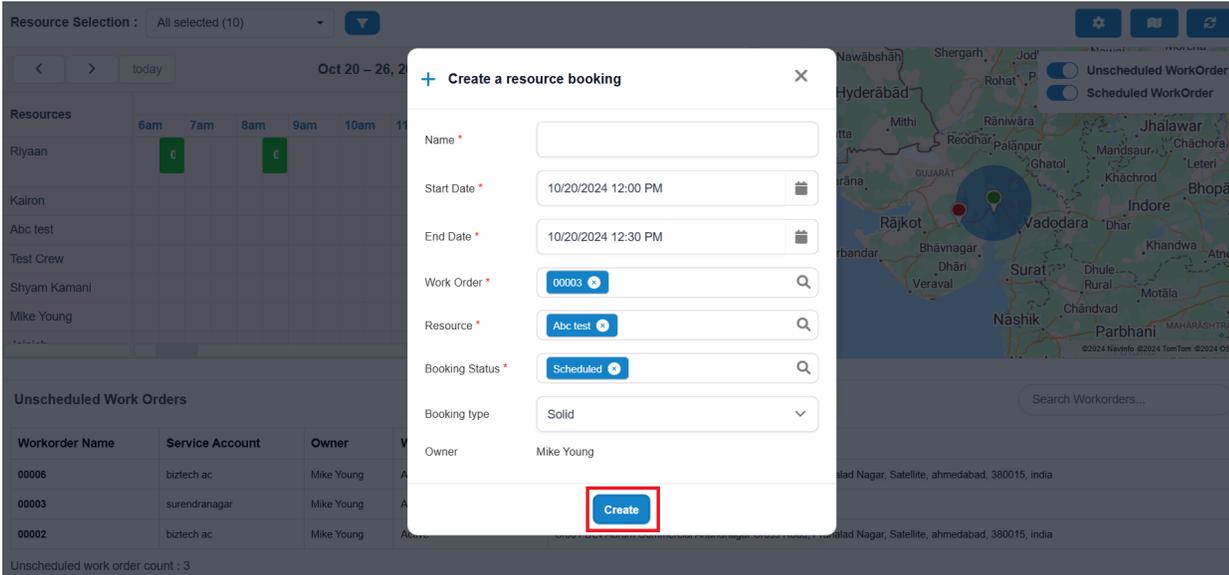
Users can create a booking according to resources using the **drag-and-drop feature**. This intuitive functionality allows users to drag a work order from the grid and drop it onto the calendar.

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.



Resource Selection : All selected (10)

today Oct 20 – 26, 2024

Resources

Resources	6am	7am	8am	9am	10am
Riyaan	€		€		
Kalron					
Abc test					
Test Crew					
Shyam Kamani					
Mike Young					

Unscheduled Work Orders

Workorder Name	Service Account	Owner
00006	biztech ac	Mike Young
00003	surendranagar	Mike Young
00002	biztech ac	Mike Young

Unscheduled work order count : 3

Unscheduled WorkOrder
Scheduled WorkOrder

Search Workorders...

Owner Mike Young

Create

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.

Resource Selection : All selected (10) [Filter Icon]

Navigation: < > today Oct 20 – 26, 2024 [day] [week] [month]

Resources: Sun 10/20

Resources	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm
Riyaan												
Kairon												
Abc test												
Test Crew												
Shyam Kamani												
Mike Young												

Map: Hyderabad, Rajkot, Vadodara, Surat, Nashik, Parbhani, etc.

Map Legend: Unscheduled WorkOrder, Scheduled WorkOrder

00001

Work Location: Onsite
Work Order: 00001

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

Resource Selection : All selected (10) [Filter Icon]

Navigation: < > today Oct 20 – 26, 2024 [day] [week] [month]

Resources: Sun 10/20

Resources	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhanla												
Adil Shaikh												
James France												

Map: Hyderabad, Rajkot, Vadodara, Surat, Nashik, Parbhani, etc.

Map Legend: Unscheduled WorkOrder, Scheduled WorkOrder

Workorder name :- 00003
Owner: Mike Young

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

Contact Us

We simplify your business, offer unique business solutions in digital web and IT landscapes.

Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: <https://www.appjetty.com/dynamicscrm-all-in-one-calendar.htm> and click on the Live Chat button for instant support.

Tickets

- 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.

Customization:

If you would like to customize or discuss about additional feature for **Calendar 365**, please write to sales@appjetty.com