

USER MANUAL



Calendar 365

"Calendar View & Functionalities"

Version: 7.1

Compatibility: Microsoft Dynamics 365 (Online and Dataverse)

Browser Compatibility:

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



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Introduction

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

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

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

Compatibility

• Microsoft Dynamics 365 (Online and Dataverse)

Pre-requisites

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

Calendar Management

Calendar 365

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



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



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 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.

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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.

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	Search	١
	Select all	
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Customer	🗸 Avery Howard	
Customers	🗸 Cacilia Viera	
Contacts 🗸 🗸	Z Carla Vates	
Contacts		
Accounts	🔽 Dwayne Elijah	



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.

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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.

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26 Osci Calcinati Comm.	View	10	20	21	22	22	24	25
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• From the left navigation, by clicking on the "Entity Calendar" dropdown, you will get the list of Entities that you have configured.



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Entity Calendar	Members by room							
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🔏 User Calendar Confi	meeting by account							
Report & Scheduler	Bookable Resurce Calendar Service Activity by account Meeting By Case	19	20 Visits	21	22	23	24	25
	Student - By Course							
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• Once you select the entity, the "View" will be displayed as per the entity that has been selected. Select the "View" accordingly.

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• 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.

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A Activity Report	Top Down View 🗸						
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	● On ◯ Off						
	·						

• 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	\sim
View	
My Active Contacts	\sim
Contacts	
All selected (11)	\sim
Search	8
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.



• 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.

🖉 Joseph Den					
🛃 Kat Den					
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Recurring Appointment	Quick Campaign				
Social Activity	 Birthday 				



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 🔹					
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Tooltip on Calendar

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

≫ Today		📰 Agree t	December 2 o above in Sponsor le	020 etter (sa		Day 2 Da	ays Week Month
Mon 30 ∰ NewAppnt1 7 10:00 AM \$. Discu	10:00 A	Activity T Due Date Owner: M Priority: Regardin Start Dat	Type: Task e: 12/9/2020 10:00 AM Ailenia Den Normal ng: Alpine Ski House (s te: 12/9/2020 10:00 AM	ample) A	3 10	Fri 4 10:00 AM & availa 11	Sat 5 02:00 PM € Very Ii 10:00 PM ≅ Pain a 12 10:00 AM ≅ Evalu
10:00 AM 🗃 Pre-p				10:00 AM 🗃	Prop		
14	10:00 AI	15 M 🗃 Aske	16 12:00 AM ∰ Discu	10:00 AM 📞	17 Vill b	18	19 12:00 AM 🗎 Invoic



Pop-up Settings:

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

Activity Detail view on Calendar

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

🛗 Appointment					
Meeting with jack		۲	Can't	Ŵ	:
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.





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.

«	< >	> >>	Today	October 2021 Day				ays We
Sun Mon Tue W						Thu	Fri	
	26	5	27	28	29	30	1	
🛗 Provid	de product ov	erview						
			🋗 John ap	pointment	QA Ac	05:25 PM 🗃 Provide (+1	required information at +1	out devic +1
3 Activity Type: Appointment Image: Provide product overview Owner: Prakash Bambhania Priority: Normal			6	5 7	8			
E Provid	de required in	nformation a	Regardir Start Tin End Time	ng: - ne: 10/12/2021 12:00 A a: 10/13/2021 12:00 AM	M 13	14	15	
🛗 Produ	ıct demo & di	scussion				1	13	
		04:30 PM	Appoi	12:00 AM 🎒 John a	04:54 PM 📰 Provide	required information		
🛗 Produ	17 uct demo &	7	18	19	20	21	22	

• 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"







Demo Appointment		۲	Can't	Û	:
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.

~	ď	🔚 Save	🗸 Ma	rk Complete	🖔 Refresh	🔍 Check Ac	cess 🗗	Process 🗸	:	
Q Al	A app pointm ppointr	ent · Appo ment Re	nt - Save Pintment	d V			Normal Priority	Scheduled Status	Josh Ginni Owner	\checkmark
	Requ	uired		🔁 A. Datur	n Corporation					
	Opti	onal								
	Subj	ect	*	QA appointr	nent					
	Loca	ition								
	Rega	arding								
	Attach	ments								

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.

\times		
Top Down View	~	•
Activities 🗸		
🔽 Task	V Fax	
🔽 Phone Call	Email	
🗹 Letter	Appointment	
Activity	Campaign Activity	
Recurring Appointment	Social Activity	

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.

Activities 🗸							
🗸 Task 🗾	Fax						
🔽 Phone Call 🛛 🔽	Email						
🗸 Letter 🗸	Appointment						
Activity	Campaign Activity						
Recurring Social Activity							
Status 🗸							
 ✓ Open ✓ Completed ✓ Canceled ✓ Scheduled 							

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

Priority



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



Weekends

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

Weekends					
◯ On ④ Off					
	-				

Holidays

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

Weekends						
● On ◯ Off						
🖌 Holiday	Official Ho 🗸					
J.	Select					
Uncoming Events	Government Holidays					
opcoming Events	Official Holidays					
Day	\sim					

- 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.



Sup	Mon	Tuo	Wod	Thu	Eri	Cat
Suit	WOII	Tue	weu	IIIu		501
27	28	29 10:00 AM ≣ Pre-propo	30	31 ■ Halloween 02:00 PM ■ Sponsor ha	1 02:50 PM	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	12	13	14	15	16
	😰 Veterans Day	10:00 AM 클 Evaluation 12:00 PM & Likes some	10:00 AM & Mailed an i 12:00 PM 를 Verbal app	10:00 AM 📞 availability	10:00 AM ≅ Evaluation 02:00 PM ℃ Very likely +2 more	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	20 10:00 AM	21	22 02:50 PM 🌐 Review Lead	23
24	25 12:00 AM ∰ Appointme	26	27 12:00 AM Juan's Birt	28	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	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.
- <u>Example</u>: If the account is the selected resource type, it displays upcoming activities related to the accounts selected.



Refresh

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

=	≣	<u> - </u>	Ëø	С	₽	Ф
		Day	2 Da	ys	Week	Month
		Fri			Sat	
3			4			5
task F	10:47	AM 🇰 Pro	od			

<u>Note</u>: 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.

😫 All Appoint	tments			×		28
Start Date		E	and Date		Day 2 D	ays Week
03-13-2022		ii	04-12-2022	T	Fri	S
			Search:	A	1) PM & Disc) PM & Disc	
Subject 🔺	Start Date 🗧	End Date	Regarding	÷	8	
Discuss service warranty	4/1/2022 2:30 PM	4/1/2022 3:00 PM	10 Café A-100 Automatic Espresso Machines for Fabrikam		15	05:30 AM ∰ 05:30 AM ∰ +1
follow up Sync with customer	4/3/2022 9:30 PM	4/3/2022 10:00 PM	3 Café Grande Espresso Machines 🔸 for A. Datum		2 AM 😰 Inf 22	12:00 AM 🖬
New opportunities	3/24/2022 4:30 PM	3/24/2022 5:00 PM	1 Café Grande Espresso Machine for 🔶 Alpine Ski House		29	
QA appointment	4/12/2022 12:00 AM	4/13/2022 12:00 AM			6	
Derderin	2/20/2022	2/20/2022	2 Café Duo Espresso	•		

• 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 Fol	low-up	×
Activity	Appointment	\sim
Subject *	QA Follow up	
Regarding		Q
Start Date *	04/23/2022 12:00 AM	
End Date *	04/23/2022 10:19 AM	雦
All Day Event		
Required		Q
Optional		Q
Location		
	CREATE	

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

		Search by subject	~ Q	ا		2 ⊖ ♦
« <	> > To	oday	April 20	22	Day 2 D	ays Week Month
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27 03:30 PM ∰ Dis	28	29 04:30 PM ∰ Rev 04:30 PM ∰ Rev	30 03:30 PM ⊞ Rev	31	1 02:30 PM & Disc 02:30 PM & Disc +11	2 🛎
3 09:30 PM 曲 foll 09:30 PM 曲 Syn	4 03:30 PM ∰ Rev 03:30 PM ∰ Rev +5	5 12:00 AM ≧ Test 12:00 AM @ dis 12:00 AM @ dis	6	7 05:30 AM ∰ dfg tes 05:30 AM ∰ dfg tes +7	8 t +8	9 05:30 AM ≜ dfg 05:30 AM ≜ dfg +1
10	11	12 12:00 AM 🗃 Test 12:00 AM 🗃 Tes	13 12:00 AM 🗃 De	14 12:00 AM S Ou	15 12:00 AM 🗎 Inf	16 12:00 AM ≣ Inf
17 12:00 AM 글 Ou 12:00 AM 글 Ou	18 12:00 AM 🗎 Inf 12:00 AM 🗎 Inf	19	20 05:30 AM ∰ QA ap 05:30 AM ∰ QA ap	21 pointment pointment-followup	22 12:00 AM 🗎 Inf	23 05:30 AM
24	25	26 12:00 AM ≣ Ou	27	28	29	30
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.

🛗 Appointment			×
Meeting with jack		• P Î	r E
Owner:	Prakash Bambha	🔋 🖲 Follow Up Meeting	
Priority:	Normal	💬 Add/View Note	
Regarding:	Adil Shaikh	🗇 Сору	
Start Time:	8/16/2022 12:00	Share	
End Time:	8/17/2022 12:00	Reassign	
		Mark as complete	

• 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.



Activity		
Activity	Appointment	\sim
Subject *	discuss follow up meeting 2	
Regarding		Q
Start Date *	04/05/2022 12:00 AM	#
End Date *	04/05/2022 12:00 AM	Ê
All Day Event		
Required	Josh Ginni 🛛 😒	Q
Optional		Q
Location		

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

« <	> >	> То	day	April 202	22
Sun		🛗 discuss f	follow up meeting 2	2	Thu
27 03:30 PM 🏛 Disc		Activity T Owner: Jo Priority: N Regarding Start Time End Time	ype: Appointment sh Ginni Normal g: - e: 4/5/2022 12:00 Al : 4/5/2022 12:00 AM	30 Revi M	31
09:30 PM 🋗 follo	03:30 F	vi 🏢 ivevi			05:30 AM 🏥 dfg tes
09:30 PM 🋗 Syn	03:30 PN +5	I ⊞ Revi…	12:00 AM 🇰 disc	←	05:30 AM ∰ dfg tes +7
10		11	12	13	14
➡ dfg test aaa ➡ dfg test aaa-te					
17		18	19	20	21



Save and Share Calendar Views

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



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

🛗 Save Calendar	View	×
Calendar view name *	Cal.Juan	
ls public	×	
	SAVE	

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



\succ		<u>ا</u> ۵	Marke	ting f	or	\sim
		1	Intern	al Tea	m vie	w
<	Г	Dece	Mileni	a's Ca	l. –	
			Sales	Opera	tional	
Su	Мо	Tu	Marke	ting f	or De	Ξ,
29	30	1	2	3	4	5
б	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

- 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

::: Dynamics 365	Cale	endar 3	365									SANE	DBC	X				م	Ŷ	+	Y	ŝ	?	¢	Ð	W
=		\times	F	a [Riddhi	i Caler	nd	~	Next	t Refresh in:4	n 59s				Search by su	bject	~ Q	Í	0		∷	[]-1	3	₽	ф	Ð
命 Home									*																	
🕒 Recent 🗸 🗸	-	<		Ma	rch 20	025		>		« <	>	≫ Today			March	2025					Day	5 Day	ys W	/eek	Month	
A Discord		Su I	Мо	Tu	We	Th	Fr	Sa																		
× Pinned V		23	24	25	26	27	28	1		Su	n	Mon		Tue	Wed		Thu			Fri			5	Sat		
Calendar 365		2	3	4	5	6	7	8			23	3	24	25	A state Chinesetal	26		2	7		2	8			1	
🗎 Resource Calendar		9	10	11	12	13	14	15		(a) Mananshi	Dayanand				Is Maria Srivaratriz	SHIVd										
📋 Customer Calendar		16	17	18	19	20	21	22																		
🗄 Entity Calendar		23	24	25	26	27	28	29		11:00 AM 🗲 🗸	Z Varranty S	2 12:00 AM 🏥 Test	3	4	08:30 AM 🎤 Equipn	5 nent			5 11:00 A	M 🎤 Coi	npliance	7 11:30		Task N	8 lotific	
		30	31	1	2	3	4	5		11:44 AM 🋗 /	.bvvv				11:34 AM 🔄 Upcom	ning										

- 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	5	×
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.

觉 Calendar Views			×
Calendar Type:			
Shared Calendars			\sim
Show 5 \checkmark 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.

alendar 365		Try the new lo	ok 💽 🔎	v v +	Y	ø?	Ģ	MS
		Search by Subject	୍		∷≡	2 B	•	ß
< March 2024 > «	> > Today	March 2024				ys Week	Month	
25 26 27 28 29 1 2 Sun	Mon Tue	Wed	Thu	Fri		Sat		
3 4 5 6 7 8 9 10 11 12 13 14 15 16	25 26	27 28 ìnal qu		BReview the finance of the finance of the finance of the finance of the first of th	1 al qu ussion		2	
17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6	🛗 Save Entity Calendar View	· ×	7 nt call		8		9	
Entity Calendar Appointment by Regarding	Entity Calendar View Name [*] 😥	Sales Team	14		15		16	
View My Active Accounts	SAVE	LOSE	21		22		23	
2 selected	24 25	26 27	28		29		30	
Views Top Down View	31 1							
Status								

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

	Dynamics 365	alendar	r 365							O Searc
≡		>	< [Select		~			
ல்	Home				Select	Team			*	_
Ŀ	Recent 🗸	<		Oct	Sales	ream		>		~
\$	Pinned 🗸	Su	Мо	Tu	We	Th	Fr	Sa		
<u> </u>		26	27	28	29	30	1	2		
Cal	endar 365	3	4	5	6	7	8	9		
Ħ	Resource Calendar	10	11	12	13	14	15	16		
Ħ	Customer Calendar	17	18	19	20	21	22	23		
8	Entity Calendar	24	25	26	27	28	29	30		
		31	1	2	3	4	5	6		

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



																						AL	12100
с	alenda	ir 365	;											Try	the new lo	ook 💽	Q	Q	+	V	۵	? 辱	MS
)	×	Selec	t		~											4		==	≡	8 B	•	Ģ
/	< Su		Ма	we	024 Th		> Sa		«	<	>	>> Today		March 20	24							k Month	
/		26		28		1	2			Sun		Mon	Tue	Wed		Thu			Fri		Sa	it	
	3 10	4 11	5 12	6 13	7 14	8 15	9 16					Calendar Views	1		x					1		2	
	17	18 25	19 26	20 27	21 28	22 29	23 30				Calen	idar Type:					7			8		9	
	31	1	2		4	5	6				Save	ed Calendars			~								
	En	tity C	Calend	ar							Show	5 V entries	Search:				14			15		16	
	Vie	ew									Vie	w Name	Is Default	Action									
	N	one s	elected				~				Con	npleted Activities	No		,		21			22		23	
	Fili	ter one s	elected				~				Show	ing 1 to 2 of 2 entries			1		28			29		30	
	Vie	ews														, 							
	We	eeker	nds				<u> </u>				3	1 1 1											
		On	Oof	f				-															

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

Edit & Update Calendar

党 Calendar Views	;		×
Calendar Type:			
Saved Calendars			\sim
Show 5 V entries		Search:	
View Name	Is Default	Action	
Internal Team view	No		
Marketing for Dec,	No		
Milenia's Cal.	No	 Image: Image: Image:	
Sales Operational	No		
Showing 1 to 4 of 4 entries			1

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

_	~			Interr	hal Tea	am ton to u	ypdate	calendar view	🛗 Edit Calendar Vie	W	×
	Su 29	Mo 30	Tu 1	We 2	Th 3	Fr 4	Sa 5	~	Calendar view name *	Internal Team view	
	6	7	8	9	10	11	12		Is public		
	13	14	15	16	17	18	19		UPDATE	CLOSE	
	~~	~*	~~	~~	~ ·	~	~				



• 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.

営 Calendar Views			×
Calendar Type:			
Saved Calendars			\sim
Show 5 🗸 entries	Search:		
View Name	ls 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 *		Q						
	SAVE							



Look Up Enter your set	Records arch criteria.			
Look for	User	•		
Look in Search	Team User Search for records	Q		
🗆 Full M	Name 🛧		Position	Main Phc 💍
Juan	Carlos			7698182082
Mark	Carlos			
Rene	Carlos			
•				
1 - 3 of 3	(0 selected)			Page 1 🕨
	Selected records:			
Select Remove				
New			Add	<u>C</u> ancel

- 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.

觉 Calendar Vie	WS		×
Calendar Type:			
Saved Calendars			\sim
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 Vie	WS		×
Calendar Type:			
Shared Calendars			\sim
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.

党 Calendar Views					×
Calendar Type:					
Saved Calendars					\sim
Show 5 v entries		Search:			
View Name	Is Default	t 🔶	Action		
Cal.Juan	Yes		• 7		
Cal.Juan	No		• 7		
Cal.Juan - Agenda View	No		• 6	• - +	
Cal.Juan Gantt View	No		• 7		
Cal.Mark	No		• 7		

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

,y	Appointment	\checkmark
Subject *		
Regarding		Q
Start Date *	05/27/2021 12:00 AM	雦
End Date *	05/28/2021 12:00 AM	Ê
All Day Event		
Required	A. Datum 🔹 Trey Research 🔹	
	Best o' Sales 🔹 Contoso, Ltd 🔹	0
	Contoso Fabrication 🛛 Contoso Instrumen 📀	Q
	Contoso Assembly 🙁 Contoso Pharma 🔹	
Optional		

- 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 *	Product Demo & AMC explanation	
Regarding	Litware	Q
Start Date *	05/27/2021 02:00 PM	雦
End Date *	05/27/2021 04:00 PM	雦
All Day Event		
Required	A. DatumImage: Second systemAdventure WorksImage: Second systemFabrikam, Inc.Image: Second systemImage: Second systemImage: Second systemWide World ImportImage: Second systemImage: Second systemImage: Second systemWide World ImportImage: Second systemImage: Second systemImage: Second system	Q

- 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.

					Search	oy subject 🗸 🗸 🗸	Q 🤈 🗄	🔁 📰	2 B *
			_					Clic	c on this button to view list
«	<	>	>>	Today		December 2	020	Day 2 D	ays Week Month
	Sun		Мо	n	Tue	Wed	Thu	Fri	Sat
		29		30	1	2	3	4	. 5
			🛗 NewApp	nt1	10:00 AM 💪 Likes	10:00 AM 🗃 Evalu		10:00 AM 🌜 availa	02:00 PM 📞 Very li
						12:00 PM 🍾 Likes			10:00 PM 🗃 Pain a
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			10:00 AM 🖬	i Pre-p			10:00 AM 🗃 Prop		

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

🗙 🖺 Internal Team 🗸									Search by	subject 🗸 🗸	Q " ☆ ☆	Month ~		<i>2</i> E	•
< Su	I Mo	Decei Tu	mber We	2020 Th	0 Fr	> Sa		CSV	Copy Excel Pdf	Print Set Regar	ding	Week Month	earch:		
29 6	30	1	2 9	3 10	4 11	5 12	L	Select	Event \diamondsuit	Start Date 🍦	End Date	Resource	Activity Type	Status 🔶	Action
13	14	15	16	17	18	19	L		Pain admitted by sponsor (sa mple)	12/5/2020 10:00 PM	12/5/2020 10:00 PM	Milenia Den	Task	Open	
20 27	21 28	22 29	23 30	24 31	25 1	26 2	L		Sponsor has a buying vision (sample)	12/28/2020 2:00 PM	12/28/2020 2:30 PM	Milenia Den	Task	Open	
3 4 5 6 7 8 9			Access to power negotiated (sample)	12/8/2020 10:00 AM	12/8/2020 10:00 AM	Milenia Den	Task	Open							
Resources Users/Teams				\sim			Agree to above in Sponsor let ter (sample)	12/9/2020 10:00 AM	12/9/2020 10:00 AM	Milenia Den	Task	Open			
Users/Teams							Proposal Issue, Decision Due (sample)	12/10/2020 10:00 AM	12/10/2020 10:00 AM	Milenia Den	Task	Open			
# PowerQueryOnline									Evaluation Plan proposed (sa mple)	12/12/2020 10:00 AM	12/12/2020 10:00 AM	Milenia Den	Task	Open	
 # ProductInsights 									Evaluation Plan agreed upon (sample)	12/2/2020 10:00 AM	12/2/2020 10:00 AM	Milenia Den	Task	Open	
	# SIA Josep	utoCa oh Der	pture					0	Evaluation plan underway (sa mple)	12/24/2020 10:00 AM	12/24/2020 10:30 AM	Milenia Den	Task	Open	
Kat Den Power Apps Checker Applic					pplic.				Pre-proposal review conduct ed (sample)	12/7/2020 10:00 AM	12/7/2020 10:00 AM	Milenia Den	Task	Open	

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



Set Regarding under Grid View

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

CSV	Copy Excel Pdf	Print Set Regarding S			Search:		
Select	Event 🍦	Start Date	End Date	Resource	Activity Type	Status 🔶	Action
	Pain admitted by sponsor (sa mple)	12/5/2020 10:00 PM	12/5/2020 10:00 PM	Milenia Den	Task	Open	•
	Sponsor has a buying vision (sample)	12/28/2020 2:00 PM	12/28/2020 2:30 PM	Milenia Den	Task	Open	
	Access to power negotiated (sample)	12/8/2020 10:00 AM	12/8/2020 10:00 AM	Milenia Den	Task	Open	
	Agree to above in Sponsor let ter (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.

Choose a regar	ding field for the selected activities	5.
Regarding *		Q

• 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 🗸 🗸 🗸	Q AFFICH	ER LES CALENDRIE	:	2 B 🔷	
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lun.	mar.	mer.	jeu.	ven.	sam.	dim.	
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	12:00 AM 🛗 1						
4 09:00 AM ∰ app o	5	6	7	8	9	1	0
11	12	13	14	15	16	1	7
				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	Activi	ty							×
Activity	Appoi	intmer	nt					~	
Subject *]
Regarding								Q)
Start Date *	05/14	4/2020	12:00	AM				台]
End Date *	<		n	nai 202	20		>	#	
Required	Lu 27	Ma 28	Me 29	Je 30	Ve 1	Sa 2	Di 3	Q	
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Location	18 25	19 26	20 27	21 28	22 29	23 30	24 31		1
	1	2	3	4	5	6	7		,

Dynamic Date formats

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

+ Create Act	tivity	×	+ Create Ac	tivity	×
Activity	Appointment	\checkmark	Activity	Appointment	~
Subject *			Subject *		
Regarding		Q	Regarding		Q
Start Date *	05/16/2020 12:00 AM		Start Date *	16/05/2020 12:00 AM	
End Date *	05/17/2020 12:00 AM		End Date *	17/05/2020 12:00 AM	
For	mat-1		For	mat-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 <u>https://make.powerapps.com</u>
 - o Select your environment

	Power Apps	∠ Search		B Environment Q ⊗ ? (JC)
≡		Your trial environment will expire in 29 Days. Convert it to prod	uction to keep it. Learn more about trials.	Select environment ×
•	Home		let's build an ann. What should it	Spaces to create, store, and work with data and apps. Learn more
+	Create		Let's build all app. what should it	
	Learn		Collect RSVPs Track sales leads List inventory Manage inspect	
B	Apps		monutay words to describe what your app should collect track list or manage	\sim Build apps with Dataverse (2)
⊞	Tables		everyuay words to describe what your app should collect, track, list, of manage	✓ Sales Trial
oro	Flows			Developer
8	Solutions		This feature uses generative AI. <u>See terms</u>	 Other environments (1)
	More			Appjetty (default)
P	Power Platform	Other ways to create an app		
		Start with data Create new tables, select existing tables, or connect to external data sources.	Start with a page design Select from a list of different designs and layouts to get your app going.	
		Your apps		
0	Ask a virtual agent	₽ Name	Modified Owne	

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

	Power Apps		✓ Search					Biztech IT Co	onsultancy	Q 🔅	? (JW
=		+ New tab	$le \lor Import \lor \mapsto Export \lor \bigotimes A$	malyze \vee						,	
Ŵ	Home	Tables									
+	Create										
	Learn	-	Create new tables								
B	Apps	₽₽	Use AI or make tables yourself from blank, SharePoint lists, Excel, or .CSV	Create a	virtual table						
ß	Al hub		files.								
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oro	Flows										
8	Solutions	E	Table \uparrow \checkmark		Name \checkmark	Type \vee	Managed \vee	Customized \vee	Customizable $^{\smallsetminus}$	Tags \vee	
	More	0	Account	:	account	Standard	Yes	Yes	Yes	Core	
P	Power Platform	_	Address	:	customeraddress	Standard	Yes	No	Yes	Standard	
			Asset Custom Entity	:	new_assetcusto	Standard	No	Yes	Yes	Custom	
			Assignment	:	new_assignment	Standard	No	Yes	Yes	Custom	
			Attachment	:	activitymimeatta	Standard	Yes	No	Yes	Productivit	ty
			Attendance	:	new_attendance	Standard	No	Yes	Yes	Custom	
https:/	/make.powerapps.com/environmen	ts/95b0cebd-ef6c-40	06-8cfb-8d499587f944/entitie								

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

							6	A Biztech Cc	elty ompany
	Power Apps		✓ Search				▲ Biz	ronment tech IT Consultancy	Q @ ?w
≡		+ N	New form 📑 Row summary 🗠 🗟 Form settings	🖁 Ad	dvanced $ \smallsetminus $				✓ Search
ି +	Home Create	Tabl	les $>$ Account $>$ Forms \vee						
	Learn		Name \uparrow \checkmark		Form type \vee	Status \smallsetminus	Managed \vee	Customized \vee	Customizable \smallsetminus
B	Apps		Account	- :	Main	On	Yes	Yes	Yes
Ø	Al hub		Account - Mobile	:	Main	On	Yes	No	Yes
	Tables		account card	- :	Quick View	On	Yes	No	Yes
oro	Flows		Account Card form	:	Card	On	Yes	No	Yes
2	Solutions		Account for Interactive experience		Main	On	Yes	No	Yes
	More		Account for Multisession experience	:	Main	On	Yes	No	Yes
7	Power Platform		Account form for Conversation Customer Card	:	Main	On	Yes	No	Yes
			Account form for Customer Card	:	Main	On	Yes	No	Yes
			Account Hierarchy Tile Form	:	Quick View	On	Yes	No	Yes
			Account Quick Create	:	Quick Create	On	Yes	No	Yes
			Account Quick Create - Field Service	:	Quick Create	On	Yes	No	Yes
10	Ask a virtual agent								

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.

	Power Apps													愚	Environment Biztech IT Co	nsultancy	Q	÷	? (W
← B	lack 9 C 🐰 🛍 ~	📋 Delete	e 🔤 Form fiel	d 🖽 🤆	Compor	nent [JS For	m libra	ries {	Business rules	E Form prop	oerties 🔒	Form setting	gs ···		🕏 Save a c	opy 📄	Save and p	oublish	\sim
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o Once the new tab is inserted in the entity form, add the HTML web resource named "aoc_recordCalendar"

																Env	G ironment	A Biztech Company	
	Power Apps															圈 Biz	tech IT Cons	sultancy 🖵 🐯 7 🕔	9
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8.0	𝕖₄ Canvas app		23	24	25	26	27	28	1	E.		March 2025						WebResource_ Calendar	
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	Quick view		User	rs/Te	ams						4	5	6		7	8		^ Formatting	1
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- 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.

	Environment Environment Biztech IT Consultancy Q 🕸 ? (W)							
← E	Back 🏷 🦿 👗 🛍 🗠 💼 Dele	e 🖙 Form field 🎛 Component 🗊 Form libraries 🗞 Business rules 🗄 Form properties 🗟 Form settings \cdots	\blacksquare Save a copy $\ \textcircled{a}$ Save and publish $\Big \ \smallsetminus$					
=	Components ×		Calendar >					
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Abc	± Spacer ▲ > Layout	BPF Or less than one mi Constraints of the stage (< 1 Min) Constraints of the stage (< 1 Min) Constraints of the stage (< 1 Min) Constraints of the stage of t	aoc_recordCalendar :					
۲	> Grid	Summary Map Locations Calendar 365 Project Price Lists Details Geocode Address …						
sد هج	 ✓ Display iiii Calendar ℓ₊ Canvas app 	Su Mo Tu We Th Fr Sa 23 24 25 26 27 28 1 Day 5 Days Week Month 2 3 4 5 6 7 8 March 2025	Component width					
	External website	9 10 11 12 13 14 15 Wed Thu Fri Sat	Component height					
	Form Form Form Form	16 17 18 19 20 21 22 25 26 27 28 1 23 24 25 26 27 28 29 30 31 1 2 3 4 5	Use all available vertical space Scrolling As Necessary					
	 ▲ Map ← Predictive score ☑ Quick view ☑ Record summary 	Resources Users/Teams Users/Teams Jobo William	Display border Dependencies Advanced					
	Get more components	GR Responsive (885 x 533) ✓ Show hidden Off O	- Advanced					

- 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		م	0 + 7	©? 🗘 D
=	← 🗄 🗗 🕼 + Add Alert	🐵 View Alert 📓 Save 🛱 Save & Close 🔶 New 🎄 Open org chart 📑 Dea	ctivate 🤗 Connect 🗸 🗸	- Add to Marketing List &	Assign 🗓 Delete	🖻 Share 🗸
☆ Home						
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🖈 Pinned 🗸 🗸	Account · Account ~			Annual Reve	enue No. of Employees	Owner Owner
My Work	Summary Map Locations Calen	dar 365 Project Price Lists Details Geocode Address Mappyfield 365 I	nsights Insurance Tab	Warranties Trade Coverag	les Related \vee	
Sales accelerator						
Activities	🗙 🖺 Riddhi Calend 🗸	Next Refresh in: 4m 58s	Search by subject	VIEW C	ALENDARS	≡ 28 *
帶 Dashboards	< March 2025 >	Today	March 2025		Day	5 Days Week Month
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iales	23 24 25 26 27 28 29					
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ollateral	John William 🗸					
Quotes	Views	9 10 1	12	13	14	15
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a Invoices						
S Sales	Activities 🗸					

• 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 Ao	ctivity	×
Activity	Appointment	\checkmark
Subject *		
Regarding		Q
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.

		A	Biztech Compan
🕂 Create an A	Activity	×	
Activity	Appointment	~	A
Subject *	Technical Analysis and Discussion		
Regarding		Q	
Start Date *	03/20/2024 12:00 AM	#	
End Date *	03/21/2024 12:00 AM	#	
All Day Event			
Required		Q	
Optional		Q	
Location			
			-
	CREATE		

G appjelty

• 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.



\rightarrow	Lookup Records Select record		×
	Look for records		 راس
	Type to search or press Enter	to browse	
	+ New Record		
ť			
Ê			
<u> </u>			
		Add	Cancel
		Add	Cancel

- 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.

Loc Sele	okup Records ×
Lo	ok for records
Resu	ults from: 8 types of records
2	Coho Winery Tomasz Bochenek
2	Jack
2	jason
2	John
2	Karan Morbi
2	Kevin
2	Lalit Yushu Tibetan Autonomous Prefecture
2	last 7/16/2021 6:13:27 AM
2	last 7/16/2021 9:29:06 AM
	Net solution
+	New Record Advanced lookup
	Add Cancel

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



						A BIZLECH CO	
Choose contacts							×
🔎 Search							
≡ Tables	Conta	acts Lookup View (default) 🗸				Only my records	-
Accounts		Full Name ↑ Y	Email Y	Business Phone ~	Company Name ~	Address 1: City 🐃 Addr	ress
뗪 Campaign Activities	0	Abyss Des	no23@gmail.com				
	0	Alex Baker	alex@treyresearch.net	619-555-0127	Trey Research	San Francisco	
Campaigns	\odot	Avery Howard	avery@treyresearch.net	<u>567-555-0137</u>	Trey Research	Dallas	
🛠 Cases	0	Cacilia Viera	cacilia@alpineskihouse.com	281-555-0162	Alpine Ski House	Dallas	
R Contacts	0	Carla Yates	carla@treyresearch.net	456-555-0156	Trey Research	North Dartmo	
Contracts	0	charlottejames0932	charlottejames0932@gmail.com				
🖾 Entitlement Templates	0	Dwayne Elijah	dwayne@alpineskihouse.com	281-555-0160	Alpine Ski House	Dallas	
្អិ Entitlements	0	Haroun Stormonth	haroun@fabrikaminc.com	423-555-0122	Fabrikam, Inc.	Lynnwood	-
🗟 Invoices	0	Heriberto Nathan	heriberto@northwindtraders.com	614-555-0123	Northwind Traders	Huntington	
Knowledge Articles	0	ipsled	ipsled@appjetty0866.onmicrosoft.c				_
Coloring and							
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.

🕂 Create an A	ctivity	×
Activity	Appointment	\checkmark
Subject *	Technical Analysis and Discussion	
Regarding	Avery Howard 🛛 😣	Q

• Selected records can be seen in the Regarding edit box.



Start Date *	03/13/2024 03:30 PM	#
End Date *	03/13/2024 04:00 PM	
All Day Event		
Required	Zoltán Szabó 🛛 😣	Q
Optional		Q
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		
Attachment	+	
Priority	Normal	·
Description		
Owner	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 I Advance Settings", you will get the CRM backend view (CRM Form view) to create the activity.

« < >	>> Today		October 20	21	Day 21
Sun	Mon	Tue	Wed	Thu	Fri
🛗 Provide product ove	rview				
			12:00 AM ∰ QA Ac +2	05:25 PM 📰 Provide +1	required information a
mere + Creat	te an Activity			×	
Activity	Task			✓ 14	- 1
	Task			nformation	
	Pax Phone Call Email			21	2
ma Pro	Letter Appointment Recurring App	ointment			
24	Campaign Act	y ivity		28	2

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

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	A Biztech Company

Activity		
, activity	Appointment	~

• 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.

	Dynamics 365	Calenda	ır 365			✓ Search				
≡		÷	ď	🗟 Save	✓ Mark Complete	📳 Save & Close	${\mathcal C}$ Recurrence	≫ Flow ∨		
ស	Home	N	ew Ar	ppointm	ent - Unsaved					
Ŀ	Recent 🗸	Ар	pointment \cdot Appointment \vee							
Ś	Pinned 🗸	Ap	Appointment							
Cale	endar 365									
⊟	Resource Calendar		Requ	uired						
⊟	Customer Calendar		Opti	onal						
₿	Entity Calendar		Subj	ect	*					

• 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	3
Activity	Appointment	\sim
Subject *	Product V1428 Service	
Regarding	Damaged during sh	Q
Start Date *	12/08/2020 11:30 AM	Ê
End Date *	12/08/2020 02:00 PM	#
All Day Event		
Required	Binni Priestland	Q
Optional		Q
Location	As per SMS instruction	
	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.

«	<	>	>>	Today	23 December, 2020	Day	2 Days	Week	Month
					Milenia Den				
All day	🏥 Ma	chinery N	laintenand	ce					
8am									^
9am									
10am									



Create a Custom Activity

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

 ≣	₿ €) ?	٠
Day	5 Days	Week	Month

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

A Biztech Company Profile Activity Set	up Entity Calendar Setup	Expires On: C Status Trial
General Setting <		_
🛗 Activities 🗸 🗸	1 2	3 4
Task		
Fax	Custom Activity Settings	
Phone Call	Activity Name Actions	
Email		
Letter		
Appointment	Showing 1 to 1 of 1 entries	Previous 1 Next
Recurring Appointment	Configure New Activity	
Service Activity		
Campaign Activity	Personalization	
Bookable Resource Booking	Select Activity	
Custom Activity	Campaign Response	~
	Default Color	
	#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.



A Biztech Company Profile Activity Setup	Entity Calendar Setup	Expires On: C Status: Trial
General Setting		_
🛗 Activities 🗸 🗸	1 2	3 4
Task		
Fax	Custom Activity Settings	
Phone Call	Activity Name Actions	
Email	Leave I I in	
Letter		
Appointment	Showing 1 to 1 of 1 entries	Previous 1 Next
Recurring Appointment	Configure New Activity	
Service Activity		
Campaign Activity	Personalization	
Bookable Resource Booking	Select Activity	
Custom Activity	Campaign Response	~
	Default Color	
	#178d1e	

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

Cu	stom Activity Settings					
ſ		_				
	Activity Name	•	Actions			
	Leave		e b			
	Showing 1 to 1 of 1 entries			Previous	1	Next
	Configure New Activity					

• 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		۲	Salt	Ŵ	÷	
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

Location

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

м	an
9	Manchester UK
9	Mannheim Germany
9	Manali Himachal Pradesh, India
9	Manila Metro Manila, Philippines
9	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.

	cuvity	
Activity	Appointment	~
Subject *		
Regarding		Q
Start Date *	12/11/2020 12:00 AM	
End Date *	12/12/2020 12:00 AM	#
All Day Event		
Required		Q
Optional		Q
Location		
Attachment	+	
	CDEATE	

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

🔁 Add Attachment	×
File Name: Choose File No file chosen	Attach

• 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	Û
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.



• 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 Re	ecord	×
End Time *	03/12/2024 05:00 PM	
Owner *	Michael Smith 🛛 😒	Q
Regarding	Alpine Ski House 🛛 😣	Q
Start Time *	03/12/2024 04:30 PM	
Subject *	Review pricing	
	UPDATE	



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.

Copy Reco	ord	×
End Time *	03/05/2024 03:00 PM	
Owner *	Michael Smith 🛛 🛇	Q
Regarding	Northwind Trad 8	Q
Start Time *	03/05/2024 02:30 PM	
Subject *	Discuss next steps	
	CREATE	

View Icon

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





Delete icon

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



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.



🛗 Meeting				×
Review the final quotation f	or 50 Caf		۵ 🖋 🛍	÷
Owner:	Michael Smith	8	Follow Up Meeting	1
Priority:	Normal	ø	Add/View Note	
Regarding:	Alpine Ski Hou	Ū	Сору	
Start Time:	2/27/2024 7:30	4	Share	
End Time:	2/27/2024 8:00	å +	Reassign	
		Ē/	Mark as complete	+

- 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.



$\mathbf{\bullet}$	αρ	ρ	el	ły
	A Bizteo	ch Co	ompar	iy

- Notes	×
Title	
Enter a note title	
Enter A Note	
Enter a note	
File Name:	
Design.jpg Br	owse
ADD	

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

<u>Note</u>: All the CRM users can check and add notes.

Edit Activity

• Click on 'Edit' 🖊 icon to edit any created activity.





🕜 Update Ac	tivity	:	×
Activity	Appointment	\sim	•
Subject *	Review the final quotation for 50 Café A-100	Auton	
Regarding	Alpine Ski House	Q	
Start Date *	02/27/2024 07:30 PM		
End Date *	02/27/2024 08:00 PM		
All Day Event			
Required	Avery Howard	Q	
Optional	Abyss Des	Q	
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.



th	Follow Up Meeting
	💬 Add/View Note
วนร	🖻 Сору
30	< Share
	🛃 Reassign
:00	Mark as complete
	*

Copy Activit	ty	>	¢
Activity	Appointment	\sim	^
Subject *	Review the final quotation for 50 Café A-100 A	Auton	
Regarding	Alpine Ski House 🛛 🛛	Q	
Start Date *	02/27/2024 07:30 PM		
End Date *	02/27/2024 08:00 PM		
All Day Event			
Required	Avery Howard	Q	
Optional		Q	
Location			
	CREATE		¥

• 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 '

	• 🖋 🛍 🗄
th	Follow Up Meeting
	💬 Add/View Note
sus	🖸 Сору
30	< Share
00	å + Reassign
.00	Mark as complete

🚑 Reassign Event							
Event Type	Meeting						
Subject	Review the final quotation for 50 Café A-100	Autom					
Description	Hi Alex, Setting up an appointment with you to meet	* •					
User/Team *	Michael Smith	\sim					
	Search	8					
	Users						
	O Michael Smith						
	⊖ Ips Led	y J					

• 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.





	Dynamics 365 Calendar 3	365	Try the new look	م 💽	۶ +	7 🕸	? ಧ	MS
≡	← 🖆 🔚 Save ✓ M	ark Complete 🛛 Refresh	ୠ Check Access	Process	~ :		🖻 Share 🗸	Ģ
60 ⊡ ∽∕	Review the final quot espresso machines - s Meeting · Appointment ~	cation for 50 Café A- Gaved	100 Automatic	Normal Priority	Open Status	Michael Owner	Smith 🗸	
	Appointment Related ~							
8	Required	Avery Howard						
∕° A	Optional							
	Subject *	Review the final quotation f	or 50 Café A-1				l	
	Location							
	Teams meeting	No No						
	Regarding	Alpine Ski House						
	Attachments							
			:					
	File Name ↑ ~		File Size (

Delete Activity

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



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





Search Activity

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

< >	>> Today		Sea	December	✓ Q Subject Regarding Description	₿ (ay 2 Da
Sun	Mon	Tue		Wed	Thu		Fr	i
29	30		1	2		3		4
	MewAppnt1	10:00 AM & Like	25	10:00 AM 📰 Evalu 12:00 PM 📞 Likes			10:00 AM \$	availa
6	7		8	9		10		11
	10:00 AM & Discu	10:00 AM 🗃 Acc	ces	10:00 AM 📰 Agree	10:00 AM 📞 🛛)iscu		
	10:00 АМ 🗃 Рге-р				10:00 AM 🗃 🛙	Prop		

• 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.

	Search by subject	\sim	Q	
February 2025		Subject		
		Rega	rding	
V	Ved	Description		

::: Dynamics 365	Calendar 365	SA	andbox		۵ کر	+ 7 🕸 ? D
≡ 命 Home	X 🖺 Select 🗸			sony	V Q 🖲 💆	. = 2 ⊕ ♦
Recent	Activities 🗸 📩 Task 🗸 Fax	« < > » To	oday	February 2025		Day 2 Days Week Month
🖈 Pinned 🛛 🗸	Phone Call Call	Mon	Tue	Wed	Thu	Fri
Calendar 365	Letter Appointment Service Campaign	3	4	5 07:00 AM 前 sony group event with	6	7
🗎 Resource Calendar	Activity Activity					
🛱 Customer Calendar	Appointment	10	11	12	13	14
🗎 Entity Calendar	Status					
Configurations	✓ Open Completed Canceled ✓ Scheduled	17	18	19	20	21
 Configuration User Calendar Confi 	Priority 🗸	24	25	26	27	28
Report & Scheduler	✓ High✓ Normal					
A Activity Report	✓ Low	3	4	5	6	7
🕲 Work Order Scheduler	Weekends					
	◯ On ● Off	10	11	12		14
	Upcoming Events					
	Day					
	Type 🔺 Event 🔶					



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.

III Dynamics 365	Calendar 365	SAN	DBOX	ዶ ያ 🕂 ፕ 🎕 ? 🤹 🕸	w
≡ ⋒ Home C Recent ✓	From: 01-06-2024	To: Activity Status	User/Team : V All selected (46) V		Ð
🖈 Pinned 🗸 🗸				Search:	
Calendar 365		Activity Type	Activity Count	Activity Duration	
🗎 Resource Calendar	0	Task	8	127.00 Hr	
Customer Calendar	0	Fax	1	24.00 Hr	
	0	Phone Call	2	0 Min	
Configurations	0	Letter	1	24.00 Hr	
Configuration	0	Service Activity	10	101.75 Hr	
Demost & Cohodular	Showing 1 to 5 of 9) entries		1 (2) (Next)	
A Activity Report Work Order Scheduler]				

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

From:	То :	Activity Status :	Jser/Team :					
01-10-2021	31-10-2021	All selected (4) 🗸	Prakash Bambhania 🗸 🏹 🤊					
/			Search:					
	Activity Type	Activity Count	♦ Activity Duratior ♦					
0	Task	1	48.00 Hr					
0	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:
 - <u>From To</u>: It's a date range, you can get the activity records between the date selection.
 - o <u>Activity Status</u>: Filter the activities based on their Status: **Open**, **Completed**, **Canceled**, **Scheduled** & **All**.



From:	To :		Activity Status :		User/Team :	
01-10-2021	31-10-2021	#	All selected (4)	\sim	Prakash Bambhania 🗸 🗸	С
			Select all			
			Open		Search:	
	Activity Type 🍦		CompletedCanceled		Activity Duration	÷
		No r	ec 🗹 Scheduled			

- <u>User/Team</u>: Select the required team members (user/team) to check their activities as well if any.
- <u>Filter</u>: Click on the Filter icon to get the activity results as per the selected details.
- <u>Refresh</u>: 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 Statu	is: l) v	Jser/Team: Prakash Bambhania 〜 て つ			
	Activity Type	Activity	Count	Searce	ch:		
0	Task	1		48.00 Hr			
0	Appointment	2		24.50 Hr			
Showing 1 to	2 of 2 entries						

- <u>Activity Type</u>: You will get the activities under the Activity Type. By clicking on the '+' icon, you will get the activity records.
- <u>Activity Count</u>: You will get the total count of how many activities are recorded for that Activity Type.
- <u>Activity Duration</u>: 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.



rom:			To :					Activity Status :		User/Team	:			
01-10-2021		31-10-2021			All selected (4) 🗸 🗸		Prakash Bambhania 🗸 🔨			ບ				
										Sear	rch:			
		Activ	ity Type	9	÷			Activity Count	÷		Activity Du	ration	1	
0	Task			1				48.00 Hr						
•	Appoint	nent				2				24.50 Hr				
Activity	Name 🔺	St	atus	₹	Rega	rding	×	Start Time 🛛 🍦	End	Search I Time 🛛 🔶	n: Activit Duratio	y n	Act	tion
Appoinment 1 Open		Open			Opp 1			10/11/2021 4:30 PM	10/11/2021 5:00 PM		30 Min		Q	>
John appointment Scheduled -		-			10/12/2021 12:00 AM	10/13/20 AM	021 12:00	24.00 Hr		Q	>			
Showing 1 t	o 2 of 2 en	tries												1
owing 1 to	2 of 2 entr	ies												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

r

🕇 Create	e Activity	×
Activity	Recurring Appointment	\sim
Subject *	Product Analysis	
Regarding	Vincent Lauriant	Q
Required	A. Datum O Trey Research O	
	Best o' Sales O Contoso, Ltd O	
Optional	Adventure Works O Alpine Ski House O	2
	Blue Yonder Airlines Coho Winery Fabrikam, Inc. Lucerne Publishing	
Location		
	Set Recurrence	
Priority	Normal	\sim
	CREATE	

- X
 - 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.

X

C Set Recurrence

Appointment Time	
Start	2:00 PM O
End	6:30 PM 🕑
Recurrence Pattern Weekly V	
Recur Every 1 Week(s) On:	
🗌 Sunday 🕜 Monday	🗌 Tuesday 📄 Wednesday
🗌 Thursday 📄 Friday	Saturday
Range of Recurrence	
Start range	12-02-2019
End range	No End Date
	End after 4 occurrences
	O End by 12-03-2019
Set	Cancel

• Insert the details as below:



- o Appointment Time: Select Start/End Time
- o **Recurrence Pattern**: Daily/Weekly/Monthly/Yearly
 - <u>Daily</u>: Select day intervals or select weekdays.
 - <u>Weekly</u>: Insert week(s) on selecting Days.
 - Monthly: Insert Date of every month or select interval of days/week/weekends.
 - <u>Yearly</u>: 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 Rage: Insert the 'number of occurrences' when it will end or 'End by' selecting a particular 'date' or selecting 'No End Date' if the ending date is not defined.
- After inserting and selecting all the details, click on **Set** button to save recurrence and then click on **Create** button to complete the recurring appointment creation.



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

Share Activity

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


🔗 Creat	e Activity	\times
Activity	Appointment	\sim
Subject *	Appointment with Client	
Regarding	Fabrikam, Inc.	Q
Start Date *	07-12-2018 12:00 AM	
End Date *	07-13-2018 12:00 AM	Ê
Required	Maria Campbell 😵 Nancy Anderson 😵	۹
Optional	Counts Vong (samp 😵 Debra Garcia (sam 😵	۹
Location	Client's Place	
	_	

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	Overdue Activities	Activity Visibility	
Pop-up View 🗸		•	

Overdue activity on Calendar

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





Conflict Management

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

+ Create	Activity	×
Required	Maria Campbell (sa 🛇	٩
Optional		Q
🛕 Sched	uling Alerts	×
You might n problems ar	ot be able to schedule this activity until schedu e fixed	Iling
	IGNORE AND SAVE CANCEL	
Description	Product Aelease conterence with an the dealers	
Owner	Juan Carlos	
	CREATE	

• 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 🏙 Weekl	12:00 AMI 🛛 🖓 Se		
	12:00 AMI 🛛 🖉 Se		
22	22	24	
05.50 DM @ Woold	25	24	
05:59 PM Weeki			

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.



	Se	arch by subject	~ Q 🖹	₩ 📰 📰	2 ⊖ ♥
		December 2	000	Click on this button to vi	ew unscheduled activities
oday		December 2	020	Day 2 Da	ays Week Month
	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5
	10:00 AM 💪 Likes	10:00 AM 📰 Evalu		10:00 AM 🌜 availa	02:00 PM 🌜 Very li
		12:00 PM & Likes			10:00 PM 🗟 Pain a
7	8	9	10	11	12
u	10:00 AM 🗃 Acces	10:00 AM 🗃 Agree	10:00 AM 💪 Discu		10:00 AM 🗃 Evalu
р			10:00 AM 🗃 Prop		
14	15	16	17	18	19
	10:00 AM 🗃 Aske	12:00 AM 🋗 Discu	10:00 AM & Will b	10:00 AM 🗃 Technica	l analysis & Product
					12:00 AM 🗎 Invoic
21	22	23	24	25	26
er	10:00 AM 🌜 guidel	🛗 Machinery Main	10:00 AM 🗃 Evalu	11:00 AM 🋗 Machi	

- 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.

itant Date			End Date		
12-01-2020		12-31-2020			
ctivity Type	2				
Appointme	ent 🗸 Set R	equired			
			Search:		
Select	Subject 🕴	Start Date	🕴 End Date 🛛 🔶	Owner	Status 🕴
	Discussion of requirement	12/16/2020 12:00 AM	12/17/2020 12:00 AM	Milenia Den	Scheduled
		12/25/2020	12/25/2020	Milenia	Scheduled
	Machinery Replacement	11:00 AM	1:00 PM	Den	

- 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 requ	×	
Required *		Q
	SAVE CLOSE	

- 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	
11-01-2019	11-30-2019	T
Activity Type Service Activity Set Resource		
	Search:	
Select Subject 🔶 Start Date 🔶	End Date 🔶 Owner Status	×
✓ AC Services 11/21/2019 1:00 PM	11/21/2019 3:00 PM Juan Carlos Schedul	ed
Showing 1 to 1 of 1 entries 1 row selected		1

- 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 reso	×	
Resource *		Q
	SAVECLOSE	

Print Calendar

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

					A Biztech Cor	elt mpany
	Se	arch by subject	~ Q 🛱 (≝ ≡	2₿	
>> Today		December 2	020	Day 2 Da	ays Week Month	
Mon	Tue	Wed	Thu	Fri	Sat	
30	1	2	3	4	5	
HewAppnt1	10:00 AM & Likes	10:00 AM 클 Evalu 12:00 PM & Likes		10:00 AM 📞 availa	02:00 PM & Very li 10:00 PM 🗃 Pain a	
7	8	9	10	11	12	
10:00 AM & Discu 10:00 AM 를 Pre-p	10:00 AM a Acces	10:00 AM 超 Agree	10:00 AM		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**.

🛗 Appointment		×
with mike		۵ 🖋 🛍 🗄
Owner:	Prakash Bambha	< Share
Priority:	Normal	🛃 Reassign
Regarding:		Mark as complete
Start date:	08/25/2022	Mark as cancel
End date:	08/26/2022	② Convert to Opportunity
		🚱 Convert to Case

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.

🛗 Appointment		×
with mike		• 🌶 🛍 🗄
Owner:	Prakash Bambha	Share
Priority:	Normal	🛃 Reassign
Regarding:		Mark as complete
Start date:	08/25/2022	🗵 Mark as cancel
End date:	08/26/2022	⊕ Convert to Opportunity
		Convert to Case



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 Opportuni	ty	×
Customer *	Hi-rod pneumatics 📀	Q
Currency *	US Dollar 🛛 🕹	Q
Related Campaign	Product launch ca 📀	Q
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	CLOSE	

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 *	Maria Campbell (sa 🙁	Q
Subject	Products 🛛 🛞	Q
Open the new case	🖲 Yes 🔘 No	
Change the status to completed an close the form	d 🖲 Yes 🔘 No	
CON	VERT CLOSE	



Convert Activity to Lead

• Only Email activities can be converted to lead.

Convert to Lead	×
First Name:	James
Last Name:*	Steve
Company:	
Email Address:	
Open the new Lead:	🖲 Yes 🔘 No

End Series

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

🛗 Recurring A	opointment	×
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".



elect when you want the appointment series to	end
This event	
Following events from selected date	
hat would you like to do with the appointment	?
Complete	

- 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	e appointment series to end	
 This event 		
Following events from a second sec	selected date	
Selecting this will delete	all future appointments in the series	
Series End Date	11-18-2019	
What would you like to d	o with the past appointments that are open?	
 Complete 		
Cancel		
	SAVE	



Deactivate Bookable Resource Booking

Sookable Res	ource 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
D	EACTIVATE

 By clicking on Bookable Resource activity, the details of Bookable Resource will appear.

 You can Deactivate the Bookable Resource Booking by clicking on Deactivate button.

Reminder of Activity:

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

A Biztech Company	Profile Activity Setup Entity Calendar Setup	Expires On: 7/31/2025 Status: Trial
🗢 General Setting 🗸 🗸		
Calendar Settings	Notification	
Additional Settings		
Notifications	Enable Notification Reminder	
Auto Refresh	Receive Notification for the appointment	
Holidays	0	
Azure Configuration		
Owner's Color Configuration	Fachla Darlina Natification	
🖬 Activities <	Receive Notification for the appointment 0	
	SAVE	CONFIGURE LANGUAGES



×

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
	ок



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.

Dynamics 365	alendar 365	SANDBOX	م	۶ +	∇	¢ې ? د	<i>₽</i> (1
	X 🖺 Select 🗸	Search by Name	\sim	Q 🛱		: C &	\$
 B Recent ∨ 	K February 2025 > Su Mo Tu We Th Fr Sa	Contraction Contra			Day	3 Days Week	Month
🖈 Pinned 🗸 🗸	26 27 28 29 30 31 1	Sun Mon Tue Wed Thu		Fri		Sat	
Calendar 365	2 3 4 5 6 7 8	26 27 28 29	30				1
🛱 Resource Calendar	9 10 11 12 13 14 15						
📋 Customer Calendar	23 24 25 26 27 28 1	2 3 4 5	6	S. Carlosson	7		8
Entity Calendar	2 3 🖪 5 6 7 8	Vasant Panchami Omerence Networking Engineer		S Conference			
Configurations	Entity Calendar	9 10 11 12	13		14		15
Configuration	Events by venue	🕆 Guru Ravidas Jayanti 💊 lecture	-				
🖉 User Calendar Confi	View	16 17 18 19	20		21		22
Devent & Calendadar	Active Locations	Seminar	20	Networking	Engineer		
Report & Scheduler	All selected (14)						
Activity Report		23 24 25 26 Maharishi Dayanand Networking Engineer	27		28		1
Work Order Scheduler	Views						
	Top Down View	2 3 4 5	6		7		8
	Status 🗸						
	New Scheduled Canceled	•					

- 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 Customizati	on
Form Attribute	
All selected (2)	
Filter By	
Created By	
SAVE	



🕂 Create Record

Account Name *	Jordan	
Account Number	12435	
Category	Preferred Customer	~
Description	Needs Support	
Email		
Industry	Accounting	\sim
Main Phone		
Number of Employees	50	
	СПЕАТЕ	

- 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	Accounting \checkmark
Main Phone	
Number of Employees	50
Owner *	Josh Ginni 🛛 🔍 🔍
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.

		Lookup Records × Select record
+ Create Re	ecord	۶ کر
Category Description	Preferred Customer Needs Support	Users # Flow-CDSNativeConnector Flow-CDSNativeConnector@onmicrosoft.com
Email		# Flow-RP Flow-RP@onmicrosoft.com
Industry	Accounting	Advanced lookup
Main Phone		
Number of Employees Owner *	50 Josh Ginni	
Website		
	CREATE	Add Cancel

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



 \times

Choose users

F							
User Loo	kup View (default) 🗸						Only my records
	Full Name \uparrow \checkmark	Position \vee	Main 🗸	Business Unit \vee	Site \checkmark	Title \checkmark	Primary Email $ \smallsetminus $
\bigcirc	# Flow-CDSNativeConnector			org22f0e5b9			Flow-CDSNativeConnector
\bigcirc	# Flow-RP			org22f0e5b9			Flow-RP@onmicrosoft.com
\bigcirc	Microsoft Forms Pro			org22f0e5b9			enterprisesurveyappuser@c

Selected record		
	Done	Cancel

• Website: Insert the website of the record.

Number of Employees	50	
Owner *	# Flow-CDSNativ 8	Q
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.



							A BIZ
alendar 365				Try the	e new look 💽 🖇	୦ ନ + ହ	· @ ? দ (
🗙 🖺 Select 🗸				Search by	Subject 🗸	. 🖄 📰 🖿	€₽ *
< March 2024 >	« < >	>> Today		March 2024	4	Day 2	Days Week Month
Su Mo Tu We Th Fr Sa	Sup	Mon	Тие	Wed	Thu	Fri	Sat
25 26 27 28 29 1 2	2:	5 26	27	28	20	1	2
3 4 5 6 7 8 9			Review the final qu	2.0	i Meetingg	Review the final qu	-
10 11 12 13 14 15 16						🛗 Ne quote discussion	
17 18 19 20 21 22 23		2 4					
24 25 26 27 28 29 30		Appointment	D 🛱 Project kick-off	Discuss proposal	A Client call	Review proposal	9
31 1 2 3 4 5 6			Discuss next steps		New opportunities		
Entity Calendar	10	D 11	12	13	14	15	16
Appointment by Regarding V			Review pricing	Review opportunity Internal Meeting	🛗 Requirement Gath	Discuss service wa	
View							
My Active Accounts	15	7 18	19 C Daview Meeting	20	21	22	23
Filter			I Review Meeting				
All selected (5)	i						
	24	4 25	Review pricing	27 Discuss service wa	28 Discuss service plan	29	30
Views			m nenen preng	Discuss service wa	m offeets service plan		
Top Down View 🗸	3	1 1				5	6
Status							
✓ Cancered Completed ✓ Open ✓ Scheduled ✓	-						

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

∰ Jordan	
Activity Type: Account Account Name: Jordan Owner: Josh Ginni	
w jiininy	-

• 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.

<u>Note</u>: You can only display up to ten fields in the detail view.





● 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.

Account · Account ~	Locations	Annual Revenue Number of Employees Owner				
ACCOUNT INFORMATION	Timeline	Assistant				
Account Name*		This record hasn't been created yet. To enable this content, create the record.				
 Fax	Almost there					
	Select Save to see your timeline.	Primary Contact				
Parent Account						
Ticker Symbol						

• 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.



្មិ Copy Reco	rd	3
Account Name *	Jimmy	
Account Number	12345	
Category	Standard	\sim
Description	Need support	
Email		
ndustry	Accounting	\checkmark
Vain Phone		
Number of Employees	50	
Employees	50 CREATE	

• 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.

Jan [
는 디 🖬 Save 🛱 Save & Close 🕂 New	ස් Open Org Chart 🛛 Deactivate :
Jimmy - Saved Account - Account 50 Josh Ginni Annual Revenue Number of Employees Owner	\sim
Summary Details Files Assets and Location	Timeline + ♀ ፲≣ :
Account Name*	✓ Search timeline
Jimmy	🖉 Enter a note 🗎
Phone	
09898834352	
Fax	
Website	Get started
	Get statted
Parent Account	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					
9	5lot 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.

«	< > > Today	12 December, 2020	Day 2 Days Week Month
		Milenia Den	
All day			
8am			
9am			
10am	10:00 AM - 🗮 Evaluation Plan proposed (sample)		
11am			
12pm			
1pm			
2pm			
3pm			
4pm			
5pm			
6pm			
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.

						G	appjelly
						Search by subject 🗸	
«	<	>	>>	Today		11 December, 2020	
						Milenia Den	
All day							
8am	07:00 AM	1 - 01:00 P hnical an	M alysis & P	roduct enhar	cement		
9am						1	
10am							
11am							
12pm							
1pm							

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

Resources	
Users/Teams	\sim
Users/Teams	
Juan Carlos	\sim
Views	
Views Top Down View	~
Views Top Down View Top Down View	~
Views Top Down View Top Down View Gantt View	~
Views Top Down View Top Down View Gantt View Timeline 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.

	Juan Carlos	Mark Carlos	Rene Carlos
6am			·
7am			
8am			
9am		09:00 AM - 🏥 Test Demo 09:30 AM - 🎁 123	09:00 AM - 簡 4Te
10am	10:00 AM - 11:30 AM Agree to above in Sponsor letter (sample)		
11am	11:00 AM - 12:30 PM S Nancy B'Day celebration		
12pm			
1pm			
2pm			
3pm	03:10 PM - 08:10 PM Technical analysis & Product enhancement		
4pm			
۶pm کې			
6pm			•

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.

*	<	>	>>	Today		Nov 2	6 - 27,	2019	Day	2 Days	Week	Month
						ł	Kevin l	Peterson				
				Mo	n 11/26				Tue	11/27		
12a	m 🔋	:00 AM - 12	::00 AM paign Mails	12:00 AM - 12	:00 AM e a maintena	12:00 AM - 04:00 AM Appointment v Client For Product	vith	12:00 AM - 12:00 AM	2:00 AM - 12:00 Faxing Quo	PM tation Details		
12:30a	m					Discussion						
1a	m											
1:30a	m											
2a	m											
2:30a	m											······································

Week View

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



«	<	>	>>	Today		N	lov 26 - 30, 2019						Day	2	Days	Week	Month
							ŀ	(evin	Peterso	n							
		Mon	11/26		Tue 11/27			We	d 11/28			Th	u 11/29			Fri 11/	30
12am	12:00) AM - 12:00 Gampa	12:00 AM - ' i 🏥 Schedu a	12:00 12:00 Je 🕆 🖻 Sig Lette	AM - 12:00 AM gning Agreement r		12:00 Creatin	12:00 AI	12:00 AM - 1		12:00 Al Meetin	12:00 Al Call With	12:00 AM - 1 Sending				^
12:30am			maintenai appointm	nce ent			FSD	high le plans f future	Proposal Documen t		with Client	Client	Promotio nal Mails				
1am								collabo ion									
1:30am																	
2am																	
2:30am																	
3am																	

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

Gantt View

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

Day View

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

« < >	» Today	19 November, 201	9	Day 2 Days Week Month
Cambo ata	42	C	12	C
Contacts	12am	oam	12pm	өрт
Nancy Anderson	E Creating FSD			
Patrick Sands				
Paul Cannon	S Gree	tings to client		
Rene Valdes				
Robert Lyon				
Scott Konersmann				
Sidney Higa 🗸	🛗 Discuss high level plans for futu	re collaboration		

Day Span View

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





19 - 20 November, 2019

	Yvonne Mck	(ay (sample)	Susanna St	ubberod (sample)	Nancy Ande	rson (sample)	Maria Can	npbell
	Tue	Wed	Tue	Wed	Tue	Wed	Tue	
6am								
7								
7am								
8am								
9am								
10am				10:00 AM - 11:00 AM				
				📎 🖂 Price Proposal				
11am					11:00 AM - 12:30 PM Nancy B'Day			
12pm					celebration			
. - p								
1pm								
2000								
zpm								
3pm								
4.0.00								
4pm								
5pm								
4								

Week View

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

\ll \checkmark \gg	Today		Day 2 D	2 Days Week Month			
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 ord	10:00 AM 📰 Agree to a	10:00 AM 🗃 Proposal I			
		10:00 AM 📰 Access to	03:10 PM 📰 Technical				
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.



« < > »	Today			1 - 30 Nove	ember, 2019			Day 2 Da	ys Week M	onth
Users/Teams	Mon 11/18	Tue 11/19	Wed 11/20	Thu 11/21	Fri 11/22	Sat 11/23	Sun 11/24	Mon 11/25	Tue 11/26	We
Juan Carlos	09:30 AM 📞 Will	10:00 AM 📰 Agr	10:00 AM 🗃 Pro	01:00 PM 🎤 Req	02:50 PM 🋗 Revi			12:00 АМ 🋗 Арр		12:0
	10:00 AM 🗃 Acc	11:00 AM 🏷 Nar 03:10 PM 📰 Tecl		01:00 PM 🗞 🏢				12:00 AM 🔑 Tech		
					10-00 AM \$ Dies					
Mark Carlos					TO:OU AIM & DISC					
			09:00 AM 🛍 4Te			09-20 AM 🚔 122				
Rene Carlos						09.30 AMI 🏢 123				
	(•

Timeline View

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

Day View

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

«	<	>	»	Today		No	vember	29, 2019		Day	2 Daj	ys Wee	k Mor	nth
Acco	unts			12am	1am	2am	3am	4am	5am	баm	7am	8am	9am	1
Fourth	o Coffee		^											-
Litwar	e, Inc.													
Adven	ture Wo	rks												
Fabrik	am, Inc.			📞 Call Witl	n Client									
Blue Y	onder Ai	rlines		🔄 Sending	g Promotior	al Mails								
City Po	ower & L	ight												
Conto	so Pharn	naceut	cals											
Alpine	Ski Hou	se											3	
A. Dat	um Corp	oratior	ı											
Coho	Winery		•											+ -



Day Span View

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

« < >	» т	Nov 26, 2019							2 Days	Week	Month				
Contracto		Mon 11/26													
Contacts	12am	1am	2am	3am	4am	5am	баm	7am	8am	9am	10am				
Jim Glynn											^				
Maria Campbell	🛗 Appoin	itment with (lient For Pro	oduct Discus	sio										
Nancy Anderson	💊 🖂 Can	npaign Mails													
Patrick Sands															
Paul Cannon	🛗 Schedu	ıle a mainter	nance appoir	ntment											
Rene Valdes															
Robert Lyon															
Scott Konersmann															
Sidney Higa	• •														

Week View

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

«	<	>		>>	Today			Nov 26	5 - 30, 20	019		Day	y 2 D	ays 🔽	Veek	Month	
Hear	c/Toom					Wed 1	1/28			Thu 11/29							
User	s/Tean	15		6pm	7pm	8pm	9pm	10pm	11pm	12am	12am 1am 2am 3am 4am 5am						
Kevin	Peterso	n 1	•	🖬 Creati	ng FSD					🛗 Meetin	g with Clier	nt					
			4	🛗 Discus	s high level	plans for f	uture colla	boration		Call With Client							
										🖂 Sending Promotional Mails							
				(3								

Month View

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

« <	>	>>	Today		1	1 - 30 No	ovembe	r, 2019		Da	ay 2 (Days	Week	Month
lleeve/Teevee			Wed 28/11 Thu 29/11											
Users/Teams		12am	3am	бат	9am	12pm	3pm	6pm	9pm	12am	3am	6am	9am	12pm
Kevin Peterson	٠	📢 🖬 Crea	ting FSD						🗰 Meeting with Client					
iteritir eterson		🖣 🋗 Discu	uss high lev	el plans for	future coll	aboration				📞 Call With Client				
		Creatin	ng Proposal	Document						Sending Promotional Mails				
			S Greetings to clien										فر	
	-	4												•



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.

« < > »	Today	November 28,2019	Day	2 Days	Week	Month
Wednesday						
12:00am - 12:00am	Nancy Anderson: Creatin	g FSD				
12:00am - 12:00am	Sidney Higa: Discuss high	n level plans for future collaboration				
4:00am - 10:00am	Paul Cannon: Greetings t	o client				

Day Span View:

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

«	<	>	>>	Today	15 - 19 November, 2019	Day	5 Days	Week	Month
Nove	mber 1	5, 2019)						
2:00p	om - 2:3	0pm	•	Juan Carlo	: Sponsor has a buying vision (sample)				
Nove	mber 1	8, 2019	9						
9:00a	am - 9:3	0am	•	Mark Carlo	s: Test Demo				
9:00a	am - 9:3	0am	•	Rene Carlo	s: 4Te				
9:30a	am - 10	:00am	•	Mark Carlo	s: 123				
2:50p	om - 3:2	0pm	•	Juan Carlo	: Review Lead				
Nove	mber 1	19, 2019	9						
10:00)am - 1	0:30am	•	Juan Carlo	: Discuss new opportunity (sample)				
2:00p	om - 4:0	00pm	•	Juan Carlo	: Tech Review				

Week View:

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



« < >	≫ Today	17 - 23 November, 2019	Day 5 Days Week Month
Monday			November 18, 2019
9:30am - 10:30am	• Juan Carlos: Will be ordering soon	(sample)	
10:00am - 10:30am	• Juan Carlos: Access to power nego	tiated (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 	on Due (sample)	
Thursday			November 21, 2019
1:00pm - 3:00pm	• Juan Carlos: Requirement Togethe	r	
1:00pm - 2:00pm	• Juan Carlos: Product Release meet	ing	
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.

« < >	»	Today 1 - 30 November, 2019	Day	5 Days	Week	Month
November 5, 2019					Tu	esday
10:00am - 1:00pm	• M	laria Campbell (sample): List of upcoming Technical Events				
November 15, 2019					I	Friday
10:00pm - 10:30pm	• M	Iaria Campbell (sample): Pain admitted by sponsor (sample)				
November 19, 2019					Tu	esday
11:00am - 12:30pm	• N	ancy Anderson (sample): Nancy B'Day celebration				
November 28, 2019					Thu	rsday
10:00am - 11:00am	• M	Iaria 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.**

III Dynamics 365 C	Calendar 365	SAN	IDBOX		ר פ + ר פ¢ ר פ	¢b (w
≡ ☆ Home	← 🗄 Focused view 🛱 Show Chart 🗊 Delet	e 🛛 🗸 🖒 Refresh 🛛 🚽 Visualize this view	🖙 Email a Link 🛛 🗸 🔊 Flow 🗸 🗃 F	Run Report \vee 🖷 Excel Templates \vee 🖪 I	Export to Excel 🛛 🗠 🗄 Share 🕯	9
🕒 Recent 🗸 🗸	Active Calendar Configurations \vee			Edit column	nns \forall Edit filters \checkmark Filter by keyword	
🖈 Pinned 🗸 🗸	Name ↑ ~	User ~	Create Activity ~	Drag And Drop Activity ~	Title Format ~	
Calendar 365	Configuration_Aagam Talsania	🗛 Aagam Talsania	Yes	Yes	D MMMM, YYYY	
Resource Calendar	Configuration_Adil Shaikh	Adil Shaikh (Available)	Yes	Yes	D MMMM, YYYY	
Entity Calendar	Configuration_Akshi Jain	Akshi Jain	Yes	Yes	D MMMM, YYYY	
	Configuration_Akshi Jain	A Akshi Jain	Yes	Yes	D MMMM, YYYY	
Configurations	Configuration_Binsu Savsani	BS Binsu Savsani	Yes	Yes	D MMMM, YYYY	
User Calendar Confi	Configuration_Brush Your Ideas #	Brush Your Ideas # (Offline)	Yes	Yes	D MMMM, YYYY	
	Configuration_John William	👿 John William	Yes	Yes	D MMMM, YYYY	
Report & Scheduler	Configuration_Nirav Joshi	Nirav Joshi (Away)	Yes	Yes	D MMMM, YYYY	
Activity Report Scheduler	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	RB 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_Shyam Kamani	🤫 Shyam Kamani (Offline)	Yes	Yes	D MMMM, YYYY	
	Rows: 14					

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 - Save Calendar Configuration Calendar 365 Configuration Related ~	ed , Set Primary Preferences							
Calendar Settings Additional Settings Notifications	Time Zone Presets Booking Notice	(GMT+05:30) Chennai, Days	Kolkata, Mumbai, New Delhi hrs	•	mins			
Working House Pooling Link Set Primary Preferences	Cancellations & Reschedules	0 days Days 0 days	U hours hrs O hours	~	0 mins 0 mins	~		
Event Types Activities	Connect With Google and Out	tlook Calendar /Outlook Connectio	ons					
	SAVE							

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



Image: Solution and Solution and Solution Pages A and Solution	J × Jes/Au
Sign in with Microsoft	v Delhi
Connect With Google / Outlook Calendar	
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.

					Elim Star Enja	endar inate p ndalone by sche amics	365 f aying t apps. duling r 365 Ca	or Dyna hird-part meetings lendar plu	with the most affordable and challenge-free ugin.
	E	3ook y	our ap	point	ment	with	Johr	n Willia	m E
John William 🗸		<		MA	ARCH 2	2024		>	· · · · · · · · · · · · · · · · · · ·
Demo Call (60 Mins)	6	S	u Mo	Tu	We	Th	Fr	Sa	8:00 am
Intro Call (15 Mins)	6	3	4	5	6	29 7	1	2	8:15 am
apper MWC (30 Mins)	6	10) 11	12	13	14	15	16	8:30 am
test (15 Mins)	6	17	7 18 4 25	19 26	20 27	21 28	22 29	23 30	8:45 am
S Writing session (60 Mins)	6	3	1 1	2	3	4	5	6	9:00 am
									9:15 am
									9:30 am

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



~~~					<b>Calendar 365 for Dynamics: Now, Do Mor</b> Eliminate paying third-party extensions for CRM in standalone apps. Enjoy scheduling meetings with the most affordate Dynamics 365 Calendar plugin.	ntegration tole and c	a Calendar n when using hallenge-free
	E	Book you	ır ap	pointn	At 9:30 am for 60 Min	×	Ē
					First Name (Required)		
John William 🗸		<		MAR	Last Name (Required)		Afternoon Evening
		Su	Мо	Tu	Email (Required)		
		25	26	27	Add More Members(Comma separated)		8:30 am
Intro Call (15 Mins)	6	3	4	5			8:45 am
apper MWC (30 Mins)	6	10	11	12	Google Meet     O Microsoft Teams	- 1	0:00 am
test (15 Mins)	6	17	18	19	Company Name		9.00 am
Writing cossion (CoMiss)		24	25	26	Phone		9:15 am
Writing session (or mins)	0	31	1	2		<b>,</b>	9:30 am
					Book Appointment		9:45 am
							10:00 am

You need to fill in the following details:

A Biztech Company

<b>*</b>				1	Calendar 365 for Dynamics: Now, Do More Eliminate paying third-party extensions for CRM inte standalone apps. Enjoy scheduling meetings with the most affordable Dynamics 365 Calendar plugin.	with a Calent gration when us and challenge-	lar ing free
		Book you	ur apı	pointn	At 9:30 am for 60 Min	×	Ę
				~	First Name (Required) John		
John William 🗸		<		MAR	Last Name (Required) Douglas	Afterno	oon Evening
		Su	Мо	Tu	Email (Required)		
Demo Call (50 Mins)	•	25	26	27	Add More Members(Comma separated)	8	:30 am
Intro Call (15 Mins)	6	3	4	5	Martine Destauras	8:	:45 am
apper MWC (30 Mins)	3	10	11	12	Google Meet     O Microsoft Teams	9:	:00 am
test (15 Mins)	6	17	18	19	Company Name Oliver Bay		
S Writing session (60 Mins)	6	24	25	26	Phone	9:	:15 am
		51		٢	Real: Association	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.



			e	. 🕹							
	MARCH	Time:	Status:								
		(India Standard Time	)								
	20	First Name:	Last Name:								
	Madparday	Email:	Subject:								
	wednesday		Demo Call with John Douglas								
	+ Add to calender	Your Message:									
	Google			_							
	Outlook	age received? Make sure to check your spam or j	unk folders								
Need to change your appointment ?         Reschedule 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.

		e *
максн 20	Time: O9:30 AM-10:30 AM (India Standard Time) First Name: John	Status: Scheduled Last Name: Douglas
Wednesday + Add to calender Google	Email: Your Message:	Subject: Demo Call with John Douglas
Outlook ag	received? Make sure to check your spam or junk folders	
Reschedule appointment	Need to change your appointment ? Cancel appointment Book a Powered By Calendar365	new appointment

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



		⊖ ≛
МАВСН	Time:	Status:
	09:30 AM-10:30 AM (India Standard Time)	Scheduled
20	First Name:	Last Name:
	John	Douglas
Wednesday	Email:	Subject:
		Demo Call with John Douglas
+ Add to calender	Your Message:	
Google		
Outlook	age received? Make sure to check your spam or junk folder	rs
	Need to change your appointment ?	
Reschedule appointment	Cancel appointment Book	a new appointment
	Powered By Calendar365	

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

		e 🕹
MARCH	Time:	Status:
MARCH	09:30 AM-10:30 AM (India Standard Time)	A Scheduled
20	First Name:	Last Name:
20	John	Douglas
Wednesday	Email:	Subject:
realiesady		Demo Call with John Douglas
+ Add to calend	er Your Message:	
Google		
Outlook	age received? Make sure to check your spam or jur	nk folders
	Need to change your appointment?	
	Need to change your appointment :	
Reschedule appointm	nt Cancel appointment	Book a new appointment
	Powered By Calendar ²⁶⁵	

### **Reschedule Appointment**

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



	ls: duled
Are you sure? Are you sure you want to reschedule your appointment ?	Name: glas ect: o Call with John Douglas
+ CANCEL CONFIRM No message received? Make sure to check your spam or junk folders	
Reschedule appointment       Cancel appointment       Book a new         Powered By Calendar365	appointment

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.

<		MA	RCH	2024	Ļ	>	Image: Contract of the second seco
Su	Mo	Tu	We	Th	Fr	Sa	First Name *
25	26	27	28	29	1	2	9:00 am John
3	4	5	6	7	8	9	9:15 am
10	11	12	13	14	15	16	9:30 am Douglas
17	18	19	20	21	22	23	Email *
24	25	26	27	28	29	30	9:45 am johnd234@gmail.com
31	1	2	3	4	5	6	10:00 am Add More Members (Comma separated)
							10:15 am
							10:30 am Company Name
							Oliver Bay
							Phone Number
							• Update Appointment

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


		Calentiar 365 for Dynamics: Eliminate paying third-party exter standalone apps. Enjoy scheduling meetings with th Dynamics 365 Calendar plugin.	Now, Do More with a Calendar isions for CRM integration when using e most affordable and challenge-free
	Summary	Appointment	
			⊖ ±
MARCH		Time: O9:00 AM-09:00 AM (India Standard Time)	Status: Scheduled
20		First Name: John	Last Name: Douglas
Wednesday		Email:	Subject: Demo Call with John Douglas
+ Add to calend	er	Your Message:	
No	message received? Make su	ure to check your spam or junk folder	s
Reschedule appointme	Need to change ent Cancel : Powered I	e your appointment ? appointment Book By Calendar365	a new appointment

## Book a new appointment

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



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





## **Cancel Appointment**

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

	ls: duled
Are you sure? Are you sure you want to cancel your appointment?	Name: glas ect: o Call with John Douglas
CANCEL CONFIRM 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



## **Appointment History**

		-4	3	•	Enjo — Dyn	oy sche amics	duling r 365 Ca	meetings v lendar plug	with the most affordable and challenge-free gin.					
	В	Book y	our ap	point	ment	with	Johr	n Williar	m 📕					
John William 🗸		<		MA	ARCH 2	2024		>	Morning Afternoon Evening Night					
Demo Call (60 Mins)	6	SI	u Mo	Tu 27	We	Th 20	Fr	Sa	8:00 am					
Intro Call (15 Mins)	6	3	4	5	6	7	8	9	8:15 am					
apper MWC (30 Mins)	9	10	) 11	12	13	14	15	16	8:30 am					
test (15 Mins)	0	17 24	4 25	19 26	20	21	22	23 30	8:45 am					
S Writing session (60 Mins)	6	3	1 1	2	3	4	5	6	9:00 am					
									9:15 am					
									9:30 am					
English 🗸 (GMT+05:30) Chi	e 🗸								9:45 am					
			Pe	owered	By Cale	endar3	65							

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.
	Appoint	ment History
Upcoming Appointments (1)	Q Future Appointments (0)	Past Appointments (0)
<ul> <li>John William</li> <li>8:00 am (India Standard Time)</li> <li>20-March-2024</li> </ul>	Scheduled 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.

	Appointment History	
	₿ 20-03-2024	×
aimee.m@biztechcs.com	8:00 AM - 9:00 AM	
Upcoming Appointments (1)	Add to Calendar Download Ics	
John William     8:00 am (India Standard     Time)	<ul> <li>aimee.m@biztechcs.com</li> <li>Demo Call with Aim M</li> </ul>	
💼 20-March-2024	<u>a</u> -	
	Reschedule Cancel Appointment	

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.

alendar 365	SANDBOX	م	Q + V @ ? (RT
× B		Search by subject V Q	) 🖄 📰 📰 🎜 🖨 🔅
< August 2022 >	K     >     >     Today	August 2022	Day 2 Days Week Month
31 1 2 3 4 5 6	Sun Mon	Tue Wed Thu	Fri Sat
7 8 9 10 11 12 13	31 <b>1</b>	2 3	4 5 6
14 15 16 17 18 19 20		11:00 AM 🏛 Supp	TO OF AN E Supp
21 22 23 24 25 26 27			
<b>28 29 30 31</b> 1 2 3	7 8	9 10	11 12 13
4 5 6 7 8 9 10			
Resources			
Users/Teams 🗸	14 15	16 17	18 19 20
Users/Teams	10:00 AM 🋗 Supp		
2 selected V			
Views	21 22	22 24	25 26 27
Top Down View	21 22	2.5 24	25 20 27
Activities			
Appointment Appointment	28 29	30 31	1 2 3
Status			
✓ Open Completed			
Canceled 🗸 Scheduled	4 5	6 7	8 9 10
Priority 🗸			
✓ High			
▼ Normal			



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

alendar 365	SANDBOX		+ ۵ مر	∑ 🕸 ? (RT
× B		Search by subject V	۵	≡ 2⊖ ¢
< August 2022 >	K K K K K K K K K K K K K K K K K K K	August 2022	Da	ay 2 Days Week Month
Su Mo Tu We Th Fr Sa	Sun Mon Tu	e Wed	Thu Fri	i Sat
7 8 9 10 11 12 13	31 1	2 3 08:00 AM 简 Supp	4 10-00 AM @	5 6
14 15 16 17 18 19 20	All formation	11:00 AM 曲 Supp		a addam
21 22 23 24 25 26 27	Support			
<b>28 29 30 31 1 2 3</b>	Regarding: Somesh Bhagchandani	9 10	11	12 13
4 5 6 7 8 9 10	Description: - Start Time: 8/15/2022 10:00 AM			
Resources	End Time: 8/15/2022 10:30 AM Owner: Prakash Bambhania			
Users/Teams	10-00 AM @ Supp	16 17	18	19 20
2 selected				
Views	21 22	23 24	25	26 27
Activities 🗸				
Appointment Appointment	28 29	30 31	1	2 3
Status				
Open Completed				
Canceled 🖌 Scheduled	4 5	6 7	8	9 10
Priority 🗸				
✓ High				
V Normal				

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.

×B		Search by subject V	۱ 🗎 🗎	2 B *
< August 2022 >	< < > » Today	August 2022	Day 2 D	ays Week Month
Su Mo Tu We Th Fr Sa 31 1 2 3 4 5 6	Sun Mon Ti	ue Wed T	'hu Fri	Sat
7 8 9 10 11 12 13	31 <b>1</b>	2 3 08:00 AM 🏥 Supp	4 5 10:00 AM 🏦 Supp	6
14 15 16 17 18 19 20 21 22 23 24 25 26 27		<b>11:00 AM </b>		
28         29         30         31         1         2         3		×	11 12	13
4 5 6 7 8 9 10				
Resources	Support			
Users/Teams	Subject: Support	genandani	18 19	20
2 selected	Description: -			
Views	Start Time: 8/15/2022 10	0:00 AM	25 26	27
Top Down View	End Time: 8/15/2022 10 Owner: Prakash Ban	0:30 AM		
Activities 🗸				
Appointment Booking	28 29	30 31		



× B		Search	by subject 🗸 🔍 🔍	۵	= = 2 <del>(</del>	•
< August 2022 >	« < > »		August 2022		Day 2 Days We	ek Month
31       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	Sun Mor 31 Construction Activity B	1 2	Wed 3	Thu 4 10:00	Fri 5 AM @ Supp	Sat 6 13
A     5     6     7     8     9     10       Resources       Users/Teams     V       Users/Teams       2 selected     V	Subject S Regarding S Start Date *	upport 08/15/2022 10:00 AM 08/15/2022 10:30 AM		18	19	20
Views Top Down View Activities	Description - Owner P	akash Bambhania		25	26	27
Appointment Booking Appointment		RESCHEDULE	_	1		3

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.

=		×B														Search by subject 🗸 🔍 😩 🖄 📰 📰 😂 👄 🌞								
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Ŀ	Recent 🗸	K N		Aug	Just 2	UZZ		>			<	>	»				Augu	ist 202	2				Week Month	
Ŕ	Pinned $\checkmark$		1 MO	2	we	1 n 4	Fr 5	5a 6		5	Sun		Мог	ı	Tue		Wed		Т	hu	Fri		Sat	
Cale	endar 365	7	8	9	10	11	12	13						1		2		3		4		5	6	
8	Resource Calendar	14	15	16	17	18	19	20									11:00 AM 🛗 :	Supp Supp			10:00 AM 🖽 Sup	D		
	Customer Calendar	21	22	23	24	25	26	27																
8	Entity Calendar	28	29	30	31	1	2	3		Ι.	<u>~</u>	nnoi	atmon	t						11		12	13	
		4	5	6	7	8	9			•	. A	ppoi	lunen	L					<u>^</u>					
Con	figuration and Report										Suppo	rt							R					
8	User Calendar Confi	Res	sourc	es												<b>↑</b>								
Q	Work Load Report		ers/Te	ams				~			Regar	aing:		Son	nesn Bhagcha	andani				18		19	20	
~	from coud hepoin	Us	ers/T	eams							Subje	:t:		Sup	pport									
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											Owne	r:		Pra	kash Bambha	inia								
		Act	ivitie	s 🗸																				
		$\checkmark$	Appoi	ntment		Booki	ng					28		29		30		31		1		2	3	

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



														// Bii
$\times$									Sea	arch by subject	~ Q	ا (		2 e 🔶
< Su Mr	Au	gust 2	022 Th		>	« <		<b>≫</b> Today		Augu	ıst 2022		Day 2 Da	ys Week Month
31 <b>1</b>	2		4	5	6	Sun		Mon	Tue	Wed		Thu	Fri	Sat
7 8	9	10	11	12	13			1		2	3	4	5	6
14 15	16	17	18	19	20					11:00 AM 🛗 🗄	Supp		ТО:00 АМ 🏾 Supp	
21 22	23	24	25	26	27									
28 29	30	31	1	2	3	2	Canc	el			×	11	12	13
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Resour	ces					۲	Reassign							
Users/1	Feams				$\checkmark$	R	iddhi Tha	ikkar			$\sim$	18	19	20
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### Cancel

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

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ଜ	Home																	_		
C	Recent 🗸	<	h		Aug	ust 2	022 Th		>	«	<	>	> Toda		August 202	22		Day 2	Days Week	Month
Ŕ	Pinned 🗸	31		1	2		4	5	6		Sun		Mon	Tue	Wed	т	hu	Fri	Sat	
Cal	endar 365	7		8	9	10	11	12	13						2 3		4	10.00.011.02.0	5	6
6	Resource Calendar	14	1	15	16	17	18	19	20						11:00 AM 🛗 Supp			TO:OO AM E Supp		
	Customer Calendar	21	2	22	23	24	25	26	27		_									
8	Entity Calendar	28	2	29	30	31	1	2	3		<b>m</b>	Annoi	ntment			×	11	1	2	13
		4		5	6	7	8	9			······ ·	ppor	internetite							
Cor	figuration and Report	De									Supp	ort			Ē					
Co	User Calendar Confi	Re U	sers	urce /Tea	ms				$\overline{}$		Rega	rding:		iomesh Bhagchanda	ni					
8	Work Load Report			/T.e.							Subje	ect:		Support			18		9	20
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		Act	tivi	ties							Own	er:		rakash Bambhania		_				
			An		tment		Booki	ng				28	2	3	30 31					

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



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<		Aug	gust 2	022		>	Î «	<		»			A	ugust 202	2		Day 2 Da	ys Week Month
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#### **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.



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Global Events	Group Events	Round Robin Events
	1	
+ Add Event		
	-	
Announcement		
/Announcement		
		<b>\$</b> ~

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 *

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⁵ 9	а	÷	*	8	*	«	»	*	~	<	>

#### Name

Enter Event Name		

#### Description

Event Des	cription				
Event Dur	ation*				
15 min Add Me	30 min	45 min	60 min	Custom min	
Select Me	mber				
None sele	cted				-
			Cancel	Save & Close	

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.



lobal Events	Group Events	Round Robin Eve	ents		
+ Add Event					
Announceme	nt		Medical Discussion		
/Announceme	nt		/Medical Discussion		
		• •		<b>*</b> ~	



#### 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				
Announceme	nt	Medical I	Discussion	D
/Announceme	nt	/Medical	Discussion	
		<b>*</b> ~	*	
			Edit 🖉	· -
			Copy d	۶ I
			Embed </td <td>&gt;</td>	>
			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.

Medic	Calendar 385 for Dynamics: Now, Do More will     Eminishe poying third-point veterations for CMM heaps Emipoint of the second	th a Calendar ation when using a challenge-free	
<ul> <li>K</li> <li>Ku</li> <li>Ku</li></ul>	AR Last Name (Required) Email (Required) Add More Members(Comma separated) Company Name Phone Your Message Book Appointment	Afternoon Evening 9:00 am 9:15 am 9:30 am 9:45 am 10:30 am 10:30 am	
Poweree	d By Calendar365		



### **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.

Global Events	Group Events	Round Robin Event
+ Add Event		
Learning		
/Learning		<b>*</b> ~

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

×

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nt Des	cription										
nt Du	ration [*] 30 min	n	45 nin	60 min	Cus	tom mi	n				
5 in											
5 in d Me	mber										
5 in d Me	mber										

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

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



Global Events	Group Events	Round Robin Events
---------------	--------------	--------------------

+ Add Event			
earning		Fun session	
Leanning	<b>*</b> ~		<b>*</b> ~







## 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.

+ Add Event			
Learning /Learning		Fun session /Fun session	
_	* ~		
			Copy C
			Delete

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



Fur	Calendar 385 Int Dunamics: Naw. In More will       At 1:45 pm for 15 Min       X       First Name (Required)       Last Name (Required)	th a Calendar www.using chatenge-ree
MA           Su         Mo         Tu           25         26         27           3         4         5           10         11         12           17         18         19           24         25         26           31         1         2	Email (Required) Add More Members(Comma separated) Company Name Phone Your Message Book Appointment	Afternoo       Evening         12.45 pm       12.45 pm         12.30 pm       12.30 pm         2.00 pm       2.30 pm         2.30 pm       2.39 pm         2.345 pm       2.345 pm
Powered	By Calendar365	

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.

	Eliminate paying third-party extension standalone apps. Enjoy scheduling meetings with the m — Dynamics 365 Calendar plugin.	ns for CRM integration when using ost affordable and challenge-free
Summary	Appointment	
		⊖ ≛
MARCH	Time: O3:30 PM-04:30 PM (India Standard Time)	Status: Scheduled
19	First Name: Harry	Last Name: Douglas
Tuesday + Add to calender	Email: asdd@gmail.com Your Message:	Subject: Fun session with Harry Douglas
No message received? Make s	ure to check your spam or junk folders	
Need to change         Reschedule appointment         Cancel	e your appointment ? appointment Book a n	ew appointment

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.** 

	Coppietly A Biztech Company Profile Activity Setup	Entity Calendar Set	up	œ	Expires On:	0	Status: Trial
۵	Settings						
•••	Advanced	Advanced Setti	ng				
		Details			+ c	REATE	
		Entity 🔺	Entity Calendar Name	\$ A	ctions		
		Meeting	Appointment by Regarding	Ø	5 🗑		
		Showing 1 to 1	of 1 entries		Previous 1	Ne	xt

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

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





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

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

<b>III</b> Dynamics 365	Calendar 365	SANDBOX	- ۲ م	+ V 🕸 ? @ (w
≡ ŵ Home	X 🖺 Select 🗸		Search by Subject 🗸 📿 🗮	
Recent	< March 2025 > Su Mo Tu We Th Fr Sa	Today	March 2025	Day 2 Days Week Month
<ul><li>✓ Pinned</li><li>✓</li><li>Calendar 365</li></ul>	23 24 25 26 27 28 <b>1</b> 2 3 <b>4</b> 5 6 7 8	Sun         Mon         Tue           23         24         25	Wed         Thu         Fr           26         27	ri Sat
🛱 Resource Calendar	9 10 11 12 13 14 15		a Ongoing	, Training
Customer Calendar     Entity Calendar	16         17         18         19         20         21         22           23         24         25         26         27         28         29	2 3 4 magnetic Custom Development Consultation magnetic DevOps Impleme magnetic Manag	5 6 m New Feature Sho m Ongoing Strategy Session	7 8 ; Training
Configurations	<b>30 31</b> 1 2 3 4 5	Begular Service 9 10 11	12 13	14 15
<ul> <li>Configuration</li> <li>User Calendar Config</li> </ul>	Appointment by accounts	Bota Mgradion Planning     Begular Service     Bigned NDA Discussion		21 22
Report & Scheduler	View           My Active Accounts	Regular Service     Enterprise Mobili	iii Ongoing	Training
Activity Report	Filter All selected (551)	23 24 25 ≜ Industry-Specific ♠ Require Service	26 27	28 29 g Training
o work Order Scheduler	Views	30 31 1	2 3	4 5
	Top Down View	The second secon	iiii Orgong	- ron wy

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".

A Bistech Company Profile Activity	Setup Entity Calendar Setup	Expires On: Status Trial
General Setting	<	
Activities	Bookable Resource Booking Settings	]
Task		
Fax	Display Bookable Resource Booking on Ca	
Phone Call		
Email	Personalization	
Letter	Color Configuration	
Appointment	#00aabb	
Recurring Appointment	Custom Color Configuration	
Service Activity	None	•
Campaign Activity		
Bookable Resource Booking	Layout Customization	
Custom Activity	Hover Settings	
😫 Event Types	Owner	•
Meeting Form	Start Date	
	Created On	•
	Title Settings	
	Name	•
	Pop-up Settings	

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





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

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



# + Create an Activity

×

Name *	Sales Review	
Start Date *	03/13/2024 12:00 AM	
End Date *	03/14/2024 12:00 AM	曲
Duration	1 day	$\sim$
Work Order *	00006 8	Q
Resource *	Michael Smith 8	Q
Booking Status *	On Break 🙁	Q
Booking type	Solid	$\sim$
	Michael Costab	

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

<b>Dynamics 365</b>	alendar 365	SAND	30X	م	Q + Q	≫ ? <i>⊈</i> ®w
Ⅲ 命 Home	🗙 🖺 🛣 Riddhi Calend 🗸	Next Refresh in:4m 59s		Search by name V Q	۵ 🖾 🔳	C 🖶 🌩 🕫
🕓 Recent 🗸 🗸	Kebruary 2025 > Su Mo Tu We Th Fr Sa	« < > » Today		February 2025	Day	5 Days Week Month
<ul> <li>Pinned</li> <li>Calendar 365</li> </ul>	26 27 28 29 30 31 <b>1</b>	<b>Sun Mon</b> 26	<b>Tue</b> 27 28	Wed         Thu           29         30	<b>Fri</b> 31	Sat 1
Resource Calendar	9 10 11 12 13 14 15					
<ul> <li>Customer Calendar</li> <li>Entity Calendar</li> </ul>	16     17     18     19     20     21     22       23     24     25     26     27     28     1       2     3     5     6     7     8	2	3 4 12:00 AM S Client call	5 6	7	8
Configurations						
<ul><li>Configuration</li><li>User Calendar Confi</li></ul>	Resources Bookable Resource	9	10 11	12 13	14	15
Report & Scheduler	John William 🗸	16	17 18	19 20	21	22
A Activity Report	Views					
Work Order Scheduler	Top Down View	23	24 25	26 27	28	1
	Status Deactivate					
	Weekends On Off	2		5 6		8



۰.		T d C	
	📰 Clier	it call	
	<b>Activi</b> Booka	t <b>y Type:</b> ble Resource Booking	
	Owne	r: John William	
		12:00 AM 🦠 Client call	

### **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.

	Dynamics 365	alendar 365				S	SAN
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Ŕ	Pinned $\checkmark$	Search for Work Order <b>Q</b>		Sun			Mor
Cale	endar 365	00003	🖄 Ma	aharishi Da	2 ayanand .		
⊟	Resource Calendar						
$\exists$	Customer Calendar	00004				2	
⊟	Entity Calendar	00005					

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.



<b>Dynamics 365</b>	Calendar 365			Try the new
=	🗙 🖺 🗮 Select 🗸			Search by name
合 Home				
$\odot$ Recent $\lor$	Unscheduled Work orders X	« < > »	Today	March 2024
🖈 Pinned 🗸 🗸	Search for Work Order Q	Mon	Tue	Wed
Calendar 365		26	27	28
🗎 Resource Calendar			00002	
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🗎 Entity Calendar	00004	4	с с	0
Configuration and Report	00005	11	12	13
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Unscheduled Work orders X <	+ Create an Acti	vity	×	:					y 2 Da		k Month	
Search for Work Order Q	Name *			^		Thu				Fri	1	
00002	Start Date *	02/27/2024 11:51 AM										
00004	End Date *	02/27/2024 12:21 PM	<b></b>					7			8	
00005	Duration	30 minutes	~					14			15	
	Work Order *	00002 🛛	۵									
	Booking Status *	Scheduled 8	۹		I:10 AM 📎	Jane		21			22	
	Booking type	Solid	~		1:23 AM 📎 1:44 AM 📎	Sales Rev A		20				
	Owner	Michael Smith		Ŧ				28			29	
		CREATE										

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.



					A DIZLEC	,11 0 01
alendar 365			Try the new	look 💽 🔎 O	+ 7 🕸 ? י	
🗙 🖺 🛣 Select 🗸			Search by name	v a 🖲 🖻 🖪	: :: :: :: :: :: :: :: :: :: :: :: :: :	> 5
Unscheduled Work orders	« < > »	Today	February 2024		Day 2 Days Week Mon	th
Search for Work Order Q	Mon	Tue	Wed	Thu	Fri	
00003	29		31	1		2
00004	5	6	7	5	3	9
00005		·				-
	12	13	14	15	; 1	16
	19	20	21	22	. 2	23
	26	27 11:51 AM 🏷 Product Demo	28	29	1	1
	4	5	6			8



# Work order schedular

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

III Dynamics 365	Calendar 365								S	ANI	DBC	XC									مر	Q	+	Y	۲	? 4	<b>3</b> D	(JW
=	Resource Selection	n : All	selected	(10)	•																				٠	N	Ø	Q.
<ul> <li>G) Home</li> <li>G) Recent ∨</li> </ul>	< >	today										Mar	16 – 22	2025										da	ay v	veek	month	
🖈 Pinned 🗸 🗸	Resources							Su	in 3/16											Mon 3	/17							
Calendar 365	test	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	12am	1am	2am	3an	n 4a	am ê	5am	6am	7
🗎 Resource Calendar	Prakash Bambhania																											
Customer Calendar	Mike Young																											
Entity Calendar	nanji mange																											
	John William																											
Configurations	Agnese Rustich																											
Configuration	Jeremy Johnson																											
🖉 User Calendar Confi	David Mallory																											
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Report & Scheduler	Abe Downes																											
Q Activity Report	•																											
Work Order Scheduler																												
												-	~															2
	Unscheduled Wo	rk Orde	rs																				S	earch Wo	orkorder	S		
	Workorder Name			Service	Account			Owner				Work	order St	atus		A	ddress											
	00003			Aeriela Anster         Prakash Bambhania         Active         95918 Detra Park, Lansing, 49300, United States																								
	00004			Aeriela A	Aeriela Anster Prakasti Bambhania Active 96918 Debra Park, Lansing, 48930, United States																							
	00005			Aeriela A	Inster			Prakast	Bambhani	ia		Active				95	5918 Debra	Park, Lansir	ng, 48930,	United Stat	tes							
	Unscheduled work or	der 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.

Resource Selection	All s	elected (1	0)	•															\$			C
< >	today								Oct	20 - 26	2024								day	week	mon	th
Basaurasa											Sun 1	0/20							Mon 10	/21		
Resources	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	12am	1am	2am	3a
Riyaan																						
Kairon																						
Abc test																						
Test Crew																						
Shyam Kamani																						
Mike Young																						
Jainish																						
Unscheduled Wor	rk Order	s								~								Sear	rch Workd	orders		
Workorder Name	Ser	vice Acc	ount		Owner	v	Vorkorder	Status	Ad	dress												٦
00001	alas	ka			Mike Youn	ig A	Active		So	utheast Fai	rbanks, Un	ited States										
00002	bizte	ech ac			Mike Youn	ig A	ctive		C/	801 Dev Au	rum Comm	ercial Anan	dnagar Cro	ss Road, Pr	ahalad Nag	ar, Satellite,	ahmedaba	d, 380015, i	ndia			
00003	sure	ndranagar			Mike Youn	ig A	ctive		Su	rendranaga	ar, 363001,	India										
Unscheduled work ord	ler 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**

Resource Selection	I: All s	selected (	10)	•									¢ N 3	
< >	today			0	ct 20 – 2	26, 2024				day v	veek	month	Nawäbshäh Shergarh Jodt Unscheduled WorkOrder	
								Sun	10/20				Hyderabad Scheduled WorkOrder	
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Karachi Mithi Rāniwāra Jhalawar	
Riyaan					4								Nakhtarāna GUJARĀT Reodhār Palanpur Ghatol Khāchrod Rhonāl	The
Kairon													Dhar Indore Ba	
Abc test													Rājkot	
Test Crew													Porbandar Bhāvnagar Charles Dhari Surrat Dhule Charles	
Shyam Kamani													Veraval Rural Motăla	
Mike Young													Nashik Chandvad Re Nashik Maharashtra	
- Indada la													C2024 OSM @2024 TomTom @2024 NavInfo	
	4									~				
Unscheduled Wor	rk Order	s											Search Workorders	
Workorder Name	Ser	vice Acc	ount		Owner	•	Workorder	Status	A	ddress				
00002	bizte	ech ac			Mike Yo	ung	Active		C/	801 Dev Au	irum Comi	mercial Ana	ndnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india	
00003	surendranagar Mike Young Active Surendranagar										ar, 363001	, India		
00004	test	3			Mike Yo	ung	Active		Va	idodara, 39	1243, Indi	а		

Unscheduled work order count : 11

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.

Resource Selection	: All s	selected (	10)	•									🗢 NJ S
< >	today			0	ct 20 – 2	6, <b>202</b>	4		C	iay v	veek	month	Nawäbshäh Shergarh Jodt Unscheduled WorkOrder
								Sui	n 10/20				Hyderabad Scheduled WorkOrder
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Karachi Mithi Rāniwāra Jhalawar
Riyaan					C								Nakharāna Guupatr Ghatol Klachrod
Kairon													Bhopāl
Abc test													Rājkot
Test Crew													Porbandar Bhāvnagar Khandwa Atner
Shyam Kamani													Veraval Rural Motala
Mike Young													Nashik Chandvad
- 1 - 1 - 1 - Iz													Parbhani Barden Bar
										~			
Unscheduled Wor	k Order	s											Search Workorders
Workorder Name	Sei	rvice Acc	ount		Owner		Workorde	r Status	A	ddress			
00002	bizt	ech ac			Mike You	ng	Active		C/	801 Dev Au	urum Comr	nercial Ana	ndnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	sure	endranagar			Mike You	ng	Active		Su	irendranag	ar, 363001	India	
00004	test	3			Mike You	ng	Active		Va	dodara, 39	1243, India		

Unscheduled work order count : 11

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



### configuration settings.

Resource Selection	: All s	elected (1	10)	•									¢ N 2
< >	today			0	ct 20 – 26	, 2024			d	ay w	reek	month	Nawäbshäh) Shergarh Jodr Unscheduled WorkOrder
Basouraaa								Sun	10/20				Karaahi
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Răniwăra Jhalawar
Riyaan					٥								Nakhtarāna Nakhtarāna Nakhtarāna
Kairon													Indore
Abc test													Rājkot
Test Crew													Porbandar Dhari Surat 23 Dhule
Shyam Kamani													Veraval Rural Motăla
Mike Young													Nashik Chandvad Parbhani Mahārāshtra
( labelah													©2024 OSM ©2024 TomTom ©2024 Navin
										~			
Unscheduled Wor	k Order	s											Search Workorders
Workorder Name	Ser	vice Acc	ount		Owner		Workorder	Status	Ad	dress			
00002	bizte	ech ac			Mike Youn	g .	Active		C/8	01 Dev Au	rum Comr	mercial Anar	ndnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	sure	endranagar			Mike Youn	g	Active		Sur	endranaga	ar, 363001	, India	
00004	test	3			Mike Youn	g .	Active		Vac	lodara, 39	1243, India	a	

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.

Resource Selection :	All selected (10)								*	N	đ
< > to	day Oc	ct 20 – 26, 202	4	day week month		Nawābshāh Hyderābād	Shergarh Ro	hat Pa	) Unschedu	iled Wo	rkOrder Drder
Resources	lam 5am 6am 7am	8am 9 <b>9</b>	Sun 10/2	0	Karachi	Mithi		niwāra			ar 🚯
Test Crew			🍫 Resource Filter Att	tribute List	×	m	Reodhar		Mandsau		
Shyam Kamani			Crew Strategy:			rāna.	UJARĂT		Khāchr		Bhopāl
Mike Young			Select Option		~	Rājkot	J.	205			
Jainish						andar E	Bhāvnagar	Y Star		Khandw	
Prakash Bambhania			Owner:			Ve		Surat	Rural		
			Owner Value		Q		1	Nashik CH			
			Status:						C2024 OSM C20	DI TomTom	©2024 Navinfo
			Select State		~						
Unscheduled Work	Orders			_							
Workorder Name	Service Account	Owner			Apply						
00002	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandr	nagar Cross Road,	Prahalad Nagar, Sa	atellite, ahmedat	ad, 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 :	All selected (10) -			¢ w 3
< > tod	lay Oc	t 20 – 26, 202	4	day week month Nawäbshäh Shergarh Jodt Unscheduled WorkOrder
Resources 4a	am 5am 6am 7am	Su 8am 9ar	ın 10/20	Karachi Mithi Räniwära Julalawar
Test Crew			Resource Filter Att	ttribute List X Keodnar Palänpur Mandsaur, Châchora
Shyam Kamani			Crew Strategy:	rāna GUARAT Khāchrod Bhopāl
Mike Young				Bäikot Dhar Indore
Jainish			Crew Leader Managemen	nt handar Bhāvnagar Khandwa trop
Prakash Bambhania			Owner:	Dhāri Surat
Adil Shaikh			# Afzal.Qureshi Own	ner Value Q Veraval Rural Motāla
James France			Status:	
			Active	×
Unscheduled Work C	Orders			Search Workorders
Workorder Name	Service Account	Owner		Apply
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 of	ount : 11			



Resource Selection	: Abc	test, Adil	Shaikh	-									¢ NU 2
< > 1	today			00	ct 20 – 26,	2024			C	iay w	reek	month	Nawabshah Shergarh Jodr Unscheduled Workorder
Perourcer								Sur	10/20				Karachi
Readdrees	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Thatta Mithi Rāniwāra Jhalawar
Abc test													Mandsaur, Chachora
Adil Shaikh													Nakhrana ouwaka zonaco, khachrod Bhopāl Rājkot Dhar Indore B Porbandar Bhavnagar Dhar Indore B Veraval Veraval Amer Nashik Chandwad R Parbhani ManAkaterra
										~			
Unscheduled Work	k Order	s											Search Workorders
Workorder Name	Ser	vice Acc	ount		Owner		Workorder	r Status	A	ddress			
00002	bizte	ech ac			Mike Young	,	Active		C/	801 Dev Au	rum Comr	nercial Anar	ndnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	sure	endranagar			Mike Young	,	Active		Su	irendranaga	ar, 363001	India	
00004	test	3			Mike Young		Active		Va	idodara, 39	1243, India		
Unscheduled work orde	er 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.

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 Shail	kh 👻			
< >		Oc	t 20 – 26, 20	)24	day week month Nawäbshäh Shergarh Jodt Unscheduled WorkOrder
Resources	4am 5am 6ai	m 7am	8am 9	Sun 10/2 m 10am 11am 12	20 Hyderabad pm 1pm 2pm 2pm 2pm Karachi Mithi Rāniwāra Jhalawar J
Abc test Adil Shaikh				Configuration Set	tings X Reodmar Palänpur Uupto 5) : Uupto 5) :
				3 selected Calender Hover Attribute	Rājkot Landar Bhāvnagar Uupto 5) : Dhāri Surat Dhule Veraval Rural Konāla
				2 selected Map Hover Attribute (Upto	o 5) : Chândvad Ri Andrika Ashrav exoze osw ezoze tawien
Unscheduled Worl	< Orders				Search Workorders
Workorder Name	Service Account		Owner		
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 orde	er count : 11				

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.



K     X     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y     Y <th>S</th>	S
Resources     4am     5am     6am     7am     8am     9am     10am     11am     12pm     1pm     2pm     3pm       Abotest     Adil Shaikh       Adil Shaikh	orkOrder
Abic test Adii Shaikh Adii Shaikh Adii Shaikh	war 🔥
Dhāri Surat 73 Dhule Rraal Motala Veraval Nashik Chardvad Parbhani 1000	hāchora Leteri Bhopāl B Mva Atner HARASHTRA m ©2024 Navinto

Unscheduled	Work	Orders
-------------	------	--------

Unscheduled Work C	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, 38	0015, india
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India	
00004	test 3	Mike Young	Active	Vadodara, 391243, India	
Unscheduled work order of	count : 11				

Resource Selection	: All s	elected (*	10)	•															\$		e	
< >	today								Oct	20 – 26	, 2024								day	week	month	
Resources		_		_				Sur	10/20							_					Mon 10/2	21
Riyaan	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	12am	1a
Kairon																						
Abc test																						
Test Crew																						
Shyam Kamani																						
Mike Young																						
Jainish																						
										~												
Unscheduled Wor	k Order	s																Sear	ch Worko	rders		
Workorder Name	Ser	vice Acc	ount		Owner		Workorde	r Status	A	ddress												Т
00002	bizte	ech ac			Mike Your	ng	Active		C	801 Dev Au	rum Comm	ercial Anan	dnagar Cros	s Road, Pr	ahalad Nag	ar, Satellite,	ahmedaba	d, 380015, ii	ndia			
00003	sure	ndranagar			Mike Your	ng	Active		Si	irendranaga	ar, 363001,	ndia										
00004	test	3			Mike Your	ng	Active		Va	dodara, 39	1243, India											

Unscheduled work order count : 11

Resource Selection	Abc	test, Adil	Shaikh	-									* <b>*</b> 2
< >	today			0	ct 20 – 26	6, 2024			d	ay w	eek	month	Nawābshāh Shergarh Jod Rohat F Unscheduled WorkOrder
Resources								Sun	10/20				Karachi
	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Thatta Mithi Raniwara Jhalawar
Abc test Adii Shaikh													Nakhtarāna Gladol Rājkot Chadvar Porbandar Bhāvnagar Veraval Sura 7 Dhule Nashik Chandvad Fi Parbana Kandol Veraval Sura 7 Dhule Parbana Motāla Nashik Chandvad Fi Parbana Kandol Sura 7 Dhule Parbana Kandol Sura 7 Dhule Parbana Kandol Sura 7 Dhule Parbana Kandol Sura 7 Dhule Parbana Kandol Sura 7 Dhule
Unscheduled Wo	rk Order	s											Search Workorders
Workorder Name	Ser	vice Acc	ount		Owner	١	Norkorder	Status	Ad	dress			
00002	bizte	ch ac			Mike Your	ng A	Active		C/8	01 Dev Au	rum Comm	ercial Anar	ndnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	sure	ndranagar			Mike Your	ng /	Active		Sur	endranaga	r, 363001,	India	
00004	test	3			Mike Your	ng /	Active		Vac	lodara, 391	243, India		
Unscheduled work or	ler 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 se	elected (1	0)	•									¢ 🖬 8
< >	today			0	ct 20 – 26	6, <b>202</b> 4			d	lay w	eek	month	ARYANAN BUNGALOWS NILMANI
Resources								Sur	n 10/20				GADHAVI Scrieduled workOrder
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	RAM DEV NAGAR
Test Crew													i párk
Shyam Kamani													A home de he d
Mike Young													JAIN NAGARY ATTITTEUDDUU
Jainish													SARVODAY NAC
Prakash Bambhania													SAKET SANKLIT NAGAR PIRANA
Adil Shaikh													VISHALNAGAR
James France													CHALODA
										~			
Unscheduled Wor	k Orders	6											Search Workorders
Workorder Name	Ser	/ice Acco	ount		Owner		Workorder	Status	Ac	dress			
00002	bizte	ch ac			Mike Your	ng	Active		C/8	801 Dev Au	rum Comm	ercial Anar	andnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	surer	ndranagar			Mike Your	ng	Active		Su	rendranaga	ır, 363001,	India	
00004	test 3	3			Mike Your	ng	Active		Va	dodara, 39	1243, India		
Unscheduled work ord	er 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	n : All	selected (	10)	•									¢ 👊 4
< >	today			0	ct 20 – 26	, 2024			d	lay v	veek	month	AFRANAN BUNGALOWS 5 NILMANI Short WarkOm Schoduled WorkOm
Resources						Sun	n 10/20						Gabhavi Gabhavi
	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	
Test Crew													PARK
Shyam Kamani													СНОТЦА
Mike Young													JAIN NAGAR Anmedabad
Jainish													147 SHI7 SARVOD
Prakash Bambhania													SAKET SANKLIT NAGAR PIRANA
Adil Shaikh													
James France													CHALODA VISHALNAGAR PARST
													e2024 1
										~			
Unscheduled Wo	rk Orde	rs											Search Workorders
Workorder Name	Se	rvice Acc	ount		Owner		Workorder	Status	Ac	ddress			
00002	bizt	ech ac			Mike Youn	g .	Active		C/I	801 Dev Au	Irum Com	mercial Ana	Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	sur	endranagar			Mike Youn	g .	Active		Su	irendranag	ar, 363001	, India	
00004	tes	3			Mike Youn	g i	Active		Va	dodara, 39	1243, Indi	а	
00004	tes	3			Mike Youn	9	Active		Va	dodara, 39	1243, Indi	a	

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 sel	ected (10	))	-									
< >	today			0	ct 20 – 2	6, 2024			d	ay w	/eek	month	ARVAMAN BUNGALOWS
Pasourcas						Sun	10/20						Proximity For :- 00007
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Enter Km (1-99)
Test Crew													Proximity Search
Shyam Kamani													
Mike Young													Jain Nagar Anmedadad
Jainish													SHI7
Prakash Bambhania													SAKET SANKLIT NAGAR PIRANA
Adil Shaikh													
James France													CHALODA VISNALINAUSAR P
Unscheduled Wor	k Orders												Search Workorders
Workorder Name	Servi	ce Acco	unt		Owner	١	Vorkorder	Status	Ac	dress			
00002	biztech	n ac			Mike You	ng /	Active		C/8	01 Dev Au	irum Comn	nercial Ana	ndnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	surend	Iranagar			Mike You	ng /	Active		Su	rendranaga	ar, 363001,	India	
00004	test 3				Mike You	ng /	Active		Va	dodara, 39	1243, India		

Unscheduled work order count : 10

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.

< >	today			0	ct 20 – 2	6, 2024			d	ay w	reek	month	Mahesāna Unscheduled Wo
Resources						Sun	10/20						Scheduled Work
	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	
est Crew													Gandhinagar Taluka Gandhinagar
hyam Kamani													
Aike Young													SHIT Altmodehed
ainish													Anniedabad
rakash Bambhania													Mahemdāvād Mahudha
Adil Shaikh													• Kheda
ames France													Anand Mad
									-	~			NITAT VAGOO
Jnscheduled Wor	rk Order	s											Search Workorders
Workorder Name	Se	ervice Ac	count	Ow	ner	Worke	order Stat	us	Addres	SS			
00006	biz	tech ac		Mike	e Young	Active			C/801 D	ev Aurum	Commercia	I Anandnag	r Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	su	rendranaga	ır	Mike	e Young	Active			Surendr	anagar, 36	3001, India		
00002	biz	tech ac		Mike	e Young	Active			C/801 D	ev Aurum	Commercia	I Anandnag	r Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india

**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 s	elected (	10)	•										¢ 🛯 🖉
< >	today			00	ct 20 – 2	6, 2024			d	ay w	eek	month	Pătri	Unscheduled WorkOrder
Bassyraas								Sun	10/20				Viramgam	Dahegā
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Dhrangadhra 5H7	
Test Crew													Sanar	nd-
Shyam Kamani														
Mike Young													Lakhtar	
Jainish														Kheda
Prakash Bambhania														Dholka
Adil Shaikh													Bagoura	
James France													Chuda	751
										~				©2024 TomTom
Unscheduled Wor	k Order	s											Search W	orkorders
Workorder Name	Se	rvice Ac	count	Ow	ner	Worke	order Stat	us	Addres	<b>SS</b>				
00006	biz	tech ac		Mike	Young	Active			C/801 D	ev Aurum (	Commercia	I Anandnag	gar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india	
00003	su	endranaga	r	Mike	Young	Active			Surendr	anagar, 36	3001, India			
00002	biz	tech ac		Mike	Young	Active			C/801 D	ev Aurum (	Commercia	I Anandnag	gar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india	
Upschoduled work ord	or count :	2												

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	I: All s	elected (*	10)	•									C 🗎 🗘
< >	today			0	ct 20 – 26	5, <b>202</b> 4			da	ay w	reek	month	Mandal Unscheduled WorkOrde
Pasauraas						Sun	10/20						Viramgam Scheduled WorkOrder
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Dhrangadhra 347
Test Crew													Sanand
Shyam Kamani													
Mike Young													Lakhtar
Jainish													Kheda
Prakash Bambhania													Dholka N
Adil Shaikh													Limbdi
James France													NH47 Chuda
										~			SCU24 Iom
Unscheduled Wo	rk Order	s											Search Workorders
Workorder Name	Ser	vice Acc	ount		Owner	١	Norkorder	Status	Ad	dress			
00002	bizte	ech ac			Mike Youn	ng A	Active		C/8	01 Dev Au	rum Comm	ercial Anan	ndnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	sure	ndranagar			Mike Youn	ng A	Active		Sur	endranaga	ar, 363001,	India	
00004	test	3			Mike Youn	ng A	Active		Vad	lodara, 39 [.]	1243, India		
Unscheduled work or	ler 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 se	elected (1	0)	÷									
< >	today	today Oct 20 – 26, 2024							d	ay w	eek	month	Pätri Mandal Unscheduled WorkOrder
Resources						Sun	10/20						Virangam
	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Dhrangadhra SH7
Test Crew													Sanand
Shyam Kamani													
Mike Young													Lakhtar
Jainish													Kheda
Prakash Bambhania													Dholka Nac
Adil Shaikh													Bagoira
James France													NH47 Chuda Petrad
										~			d2024 TomTor
Unscheduled Wor	k Order	s											Search Workorders
Workorder Name	Ser	vice Acco	ount		Owner	,	Workorder	Status	Ad	dress			
00002	bizte	ch ac			Mike Your	ig /	Active		C/8	01 Dev Au	rum Comm	ercial Anan	dnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	sure	ndranagar			Mike Your	ig ,	Active		Su	endranaga	ır, 363001,	India	
00004	test	3			Mike Your	ig /	Active		Vac	lodara, 39	1243, 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.



Unscheduled work order count : 10





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.



Unscheduled work order count : 10



Resource Selection	: All s	elected (1	0)	•															\$			3
< >	today								Oct	20 – 26,	2024								day	week	mont	h
Pasourcas	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	1an
Riyaan			C		C																	
Kairon																						
Abc test																						
Test Crew																						
Shyam Kamani																						
Mike Young																						
Jainish																						
Prakash Bambhania																						
Adil Shaikh																						
James France																						

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.

Resource Selection :	All selected (10)	• •					<b>* N </b> 3
< > too		Oct 20 – 26, 2	+ Create a res	ource booking	×	Nawābshāh Shergarh Jod Hyderābād Rohat P	Unscheduled WorkOrder
Resources 6	am 7am 8am 9	am 10am 11	Name 8			Mithi Rāniwāra K	Jhalawar
Riyaan			Name			Palanpur	Mandsaur
Kairon			Start Date *	10/20/2024 12:00 PM	=	Booking Start Time	Khāchrod Bhopāl
Abc test			End Date *	10/20/2024 12:30 PM	<b></b>	Rājkot Booking End Time	lara Dhar
Test Crew						rbandar Bhavnagar Work Order Name	Dhule
Shyam Kamani			Work Order *	00003 😣	٩	vera (Lookup)	Rural Motāla
Mike Young			Resource *	Abc test 🗵	٩	Resource name (Lookup)	Parbhani Mahārāshtra
			Booking Status *	Scheduled 8	Q	Booking Status	©2024 Navinfo ©2024 TomTom ©2024 OSM
Unscheduled Work (	Orders		Booking type	Solid	~	Booking Type	
Workorder Name	Service Account	Owner V	Ownor	Miko Young	=	Owner (Logged-in user)	
00006	biztech ac	Mike Young A	Owner	Mike roung		alad Nagar, Satellite, ahmedabad, 380015, india	
00003	surendranagar	Mike Young A		Create			
00002	biztech ac	Mike Young Ad	dure.		55 Noua, 1 Ial	alad Nagar, Satellite, ahmedabad, 380015, india	
Unscheduled work order of	ount : 3						

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)	- 7				
< > toda		Oct 20 – 26, 2	+ Create a reso	ource booking	×	Nawäbshäh Shergarh Jod Rohat P Unscheduled WorkOrder Hyderäbäd
Resources 6ar	m 7am 8am 9a	am 10am 11				Mithi Rāniwāra Jhalawar
Riyaan	a a		Name *			Reodhar palanpur Mandsaur Châchora
Kairon			Start Date *	10/20/2024 12:00 PM		trāna gujarāt Khāchrod Bhopāl
						Rājkot Vadodara Dhar
Test Crew			End Date *	10/20/2024 12:30 PM		rbandar Bhāvnagar Khandwa Atner
Shyam Kamani			Work Order *	00003 📀	Q	Veraval Surat Rural Motala
Mike Young			Resource *	Abc test 🔊	Q	Nashik Chandvad Raharashtra
						Cartoniani +
			Booking Status *	Scheduled 😣	Q	
Unscheduled Work O	rders		Booking type	Solid	~	Search Workorders
Workorder Name	Service Account	Owner V	Owner	Mike Young		
00006	biztech ac	Mike Young A				alad Nagar, Satellite, ahmedabad, 380015, india
00003	surendranagar	Mike Young A		Create		
00002	biztech ac	Mike Young Ac	tire			alad Nagar, Satellite, ahmedabad, 380015, india
Unscheduled work order co	ount : 3					

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 se	elected (1	10)	•									¢ N S
< >	today Oct 20 – 26, 2024 day week mor								C	nonth	Nawäbshän Nudorshäd Rohat',P Schaduled WorkOrder		
Resources						Sun	10/20						Karachi
Riyaan	6am C	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	Mithi Readhar Palanpur Readhar Palanpur Nakhtarána GUJARAT Ghatol Kháchrod
Kairon				U Work Loc	etion: On	site							Bhopal Indore B
Abc test				Work Ord	ler: 00001	isite							Rājķot Vadodara Dhar
Test Crew													Porbandar Bhavnagar Ather Dhāri Surat 23 Dhule
Shyam Kamani													Veraval Rural Motāla
Mike Young													Nashik Chândvad Ra Nashik Dashbaai Mahārāshtra
1 = 1 = 1 = 1 = 1 = 1 =													62024 Navinfo 62024 TomTom 62024 OSM

## Unscheduled Work Orders

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

Unscheduled work order count : 3



## Unscheduled Work Orders

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

Unscheduled work order count : 10



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



## **Customization:**

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