



## USER MANUAL



## Calendar 365

### Calendar 365: “Installation & Configuration”

**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 Demo

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)

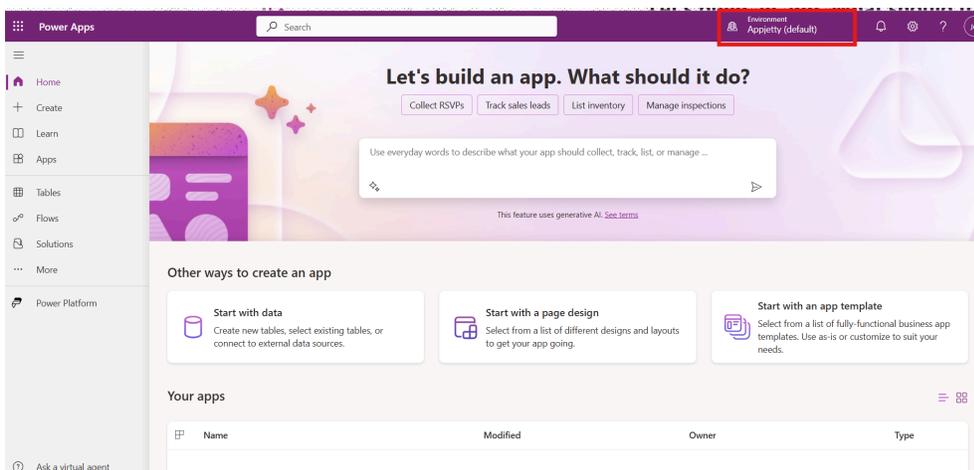
## Pre-requisites

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

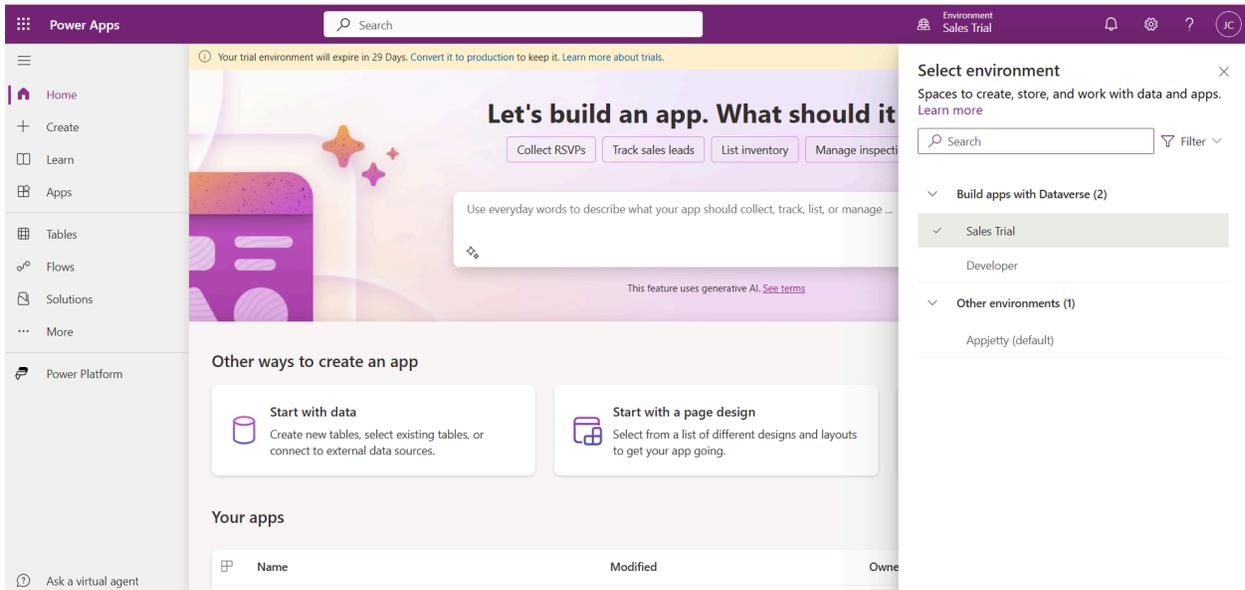
## Installation

### Installation Steps

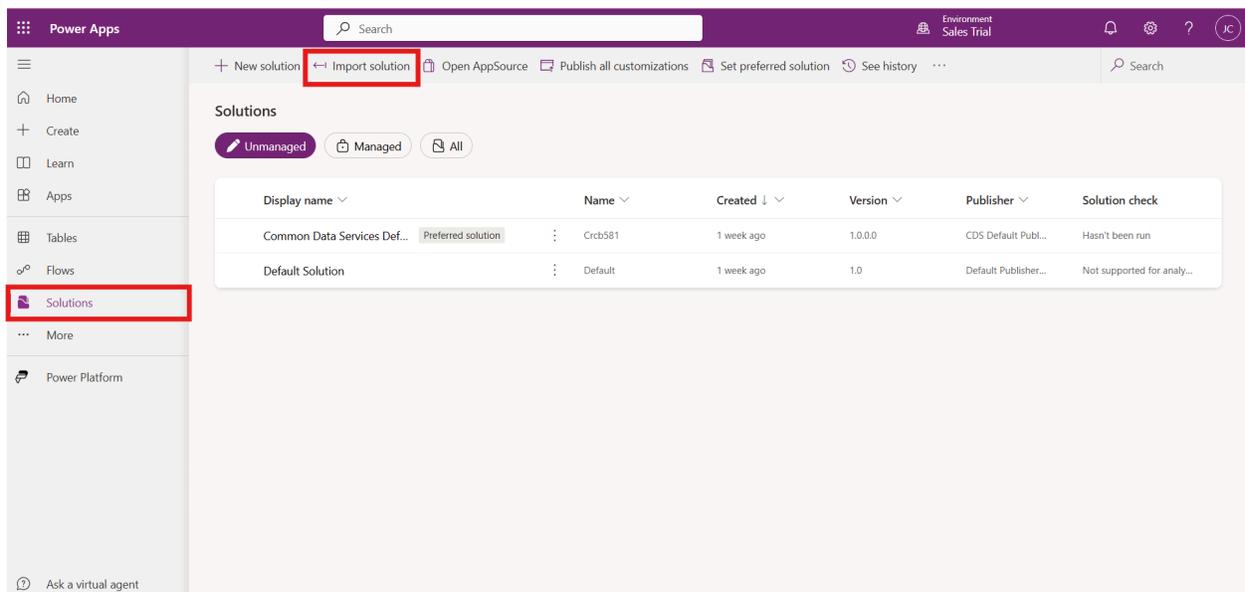
- To install the “Calendar 365” plugin, the following steps are to be followed
  - On purchasing the plugin, you will get a zip file named **Calendar365.Zip**
  - Login into your CRM Account and navigate to the <https://make.powerapps.com>



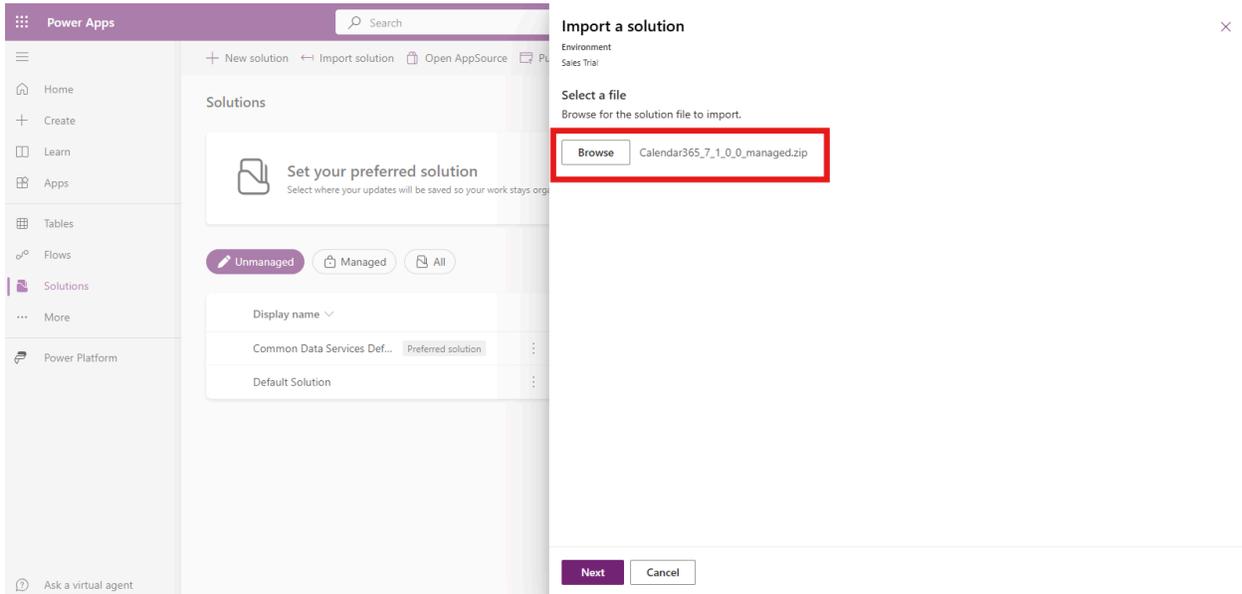
- Select Environment



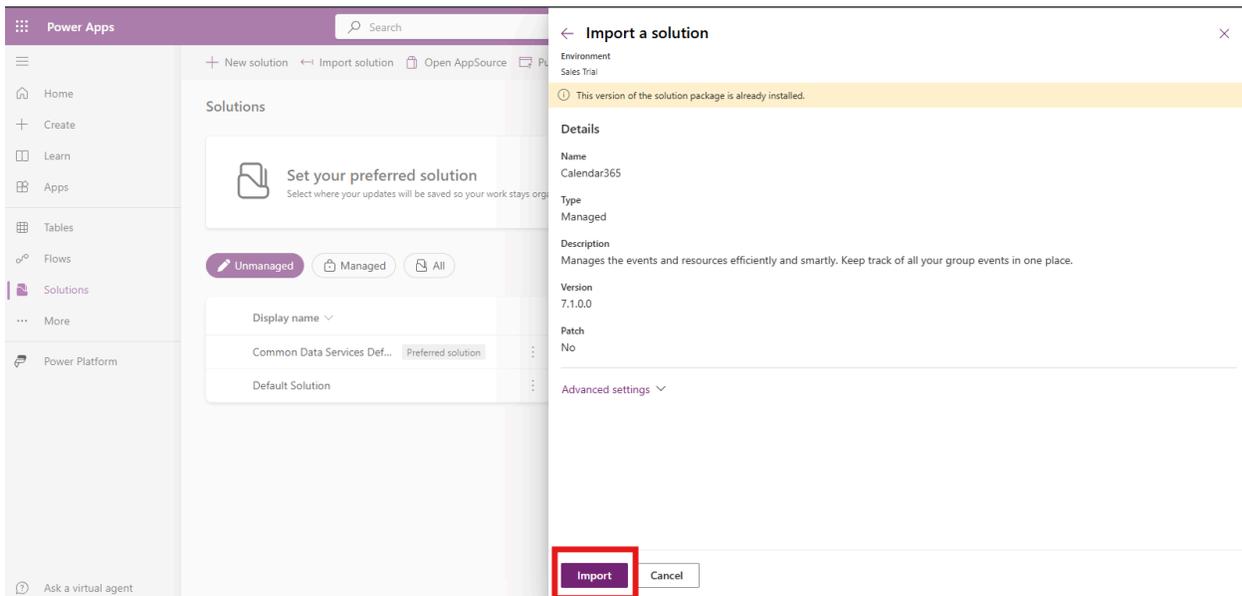
- o Select **Solutions** and click on **Import solutions**



- o Upload your **Package Zip** file and click on the **Next** button.

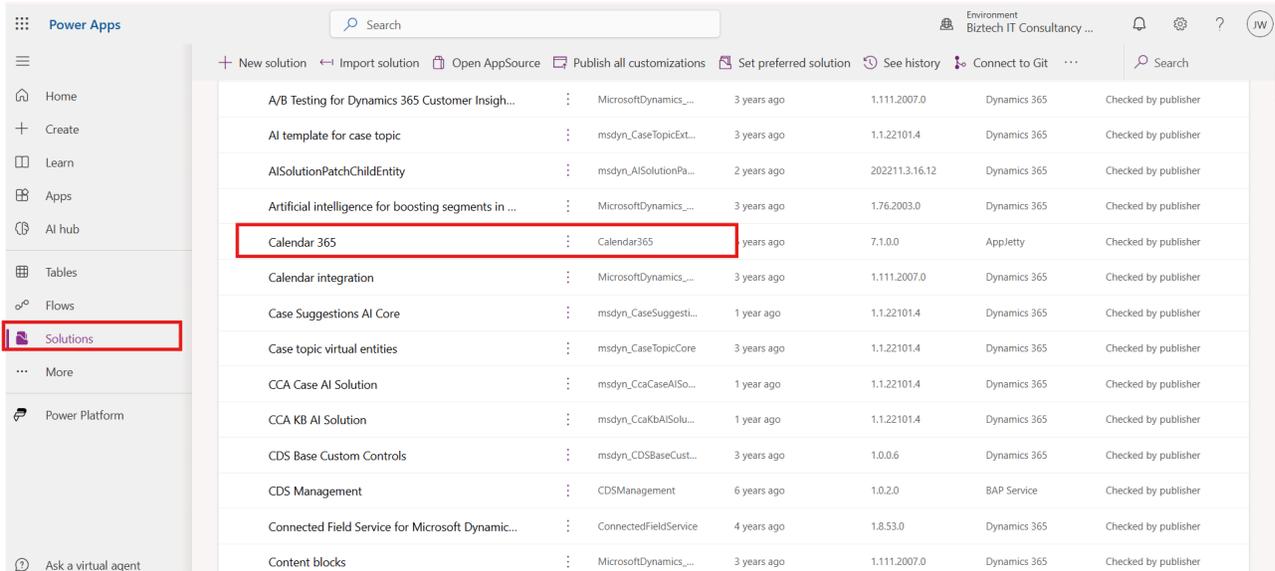


o Next click **Import**



**Note:** "This version of the package is already installed." This is only a warning message and can be safely ignored.

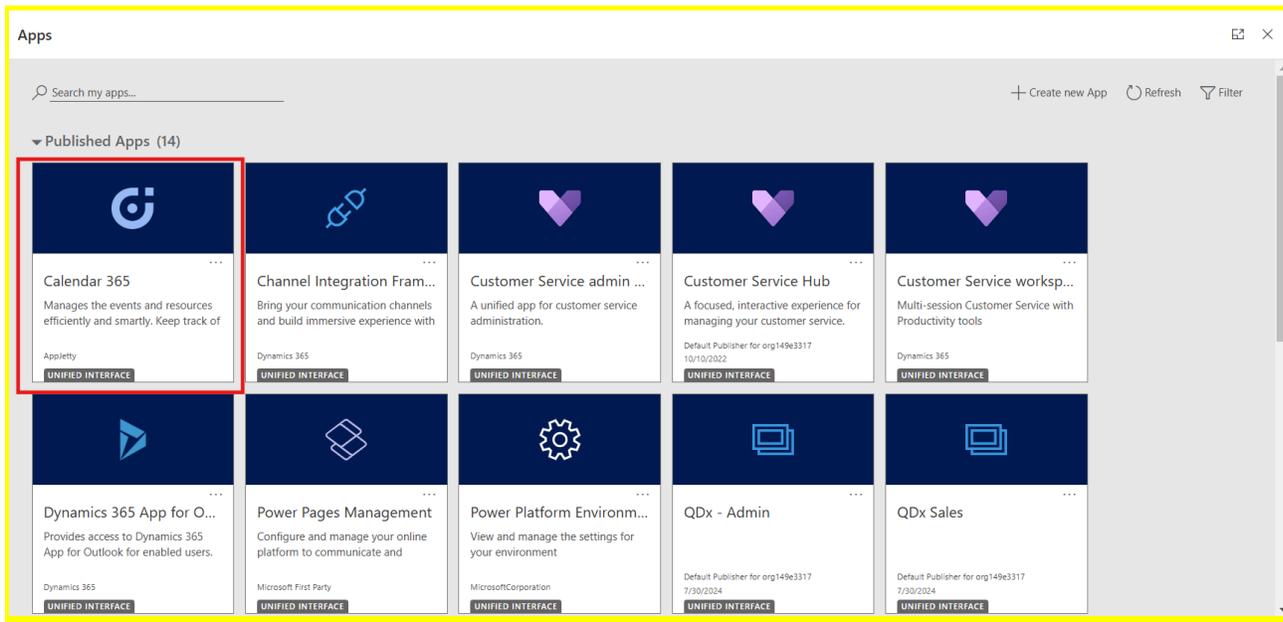
- o After successfully importing the solution, refresh the calendar first and **Save** the configuration once.
- o Once you import the solution, it will be displayed in the solutions grid view.



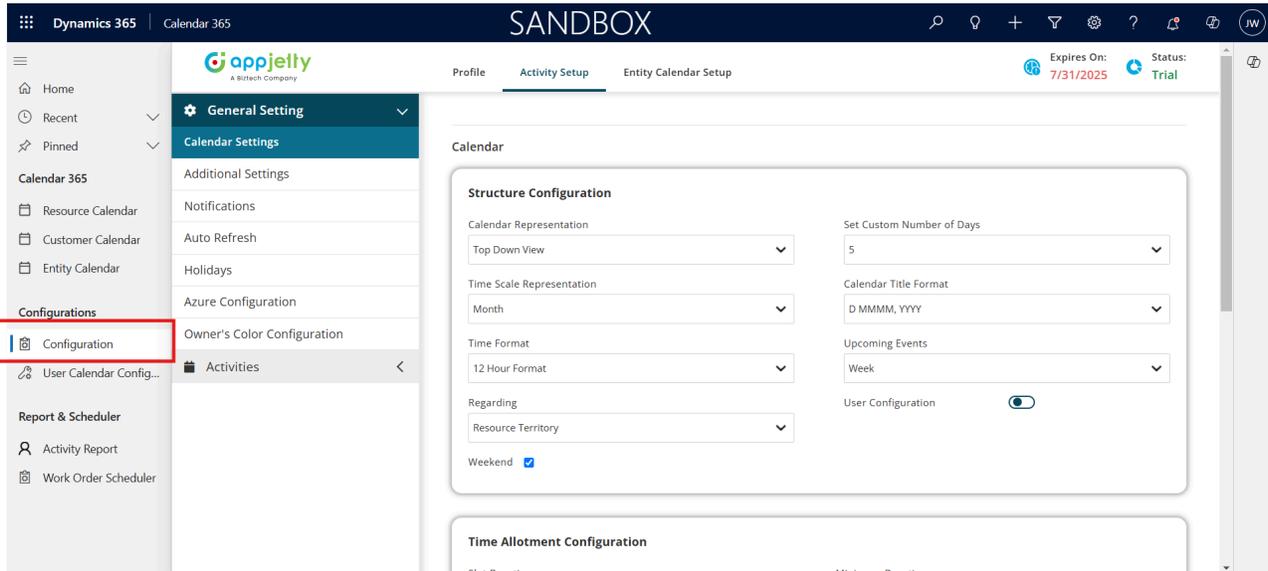
| Solution Name  | Created     | Version        | Environment  | Status               |
|--|-------------|----------------|--------------|----------------------|
| A/B Testing for Dynamics 365 Customer Insign...      | 3 years ago | 1.111.2007.0   | Dynamics 365 | Checked by publisher |
| AI template for case topic                           | 3 years ago | 1.1.22101.4    | Dynamics 365 | Checked by publisher |
| AI Solution Patch Child Entity                       | 2 years ago | 202211.3.16.12 | Dynamics 365 | Checked by publisher |
| Artificial intelligence for boosting segments in ... | 3 years ago | 1.76.2003.0    | Dynamics 365 | Checked by publisher |
| <b>Calendar 365</b>                                  | 3 years ago | 7.1.0.0        | Appletty     | Checked by publisher |
| Calendar integration                                 | 3 years ago | 1.111.2007.0   | Dynamics 365 | Checked by publisher |
| Case Suggestions AI Core                             | 1 year ago  | 1.1.22101.4    | Dynamics 365 | Checked by publisher |
| Case topic virtual entities                          | 3 years ago | 1.1.22101.4    | Dynamics 365 | Checked by publisher |
| CCA Case AI Solution                                 | 1 year ago  | 1.1.22101.4    | Dynamics 365 | Checked by publisher |
| CCA KB AI Solution                                   | 1 year ago  | 1.1.22101.4    | Dynamics 365 | Checked by publisher |
| CDS Base Custom Controls                             | 3 years ago | 1.0.0.6        | Dynamics 365 | Checked by publisher |
| CDS Management                                       | 6 years ago | 1.0.2.0        | BAP Service  | Checked by publisher |
| Connected Field Service for Microsoft Dynamic...     | 4 years ago | 1.8.53.0       | Dynamics 365 | Checked by publisher |
| Content blocks                                       | 3 years ago | 1.111.2007.0   | Dynamics 365 | Checked by publisher |

## Free Trial and Activation

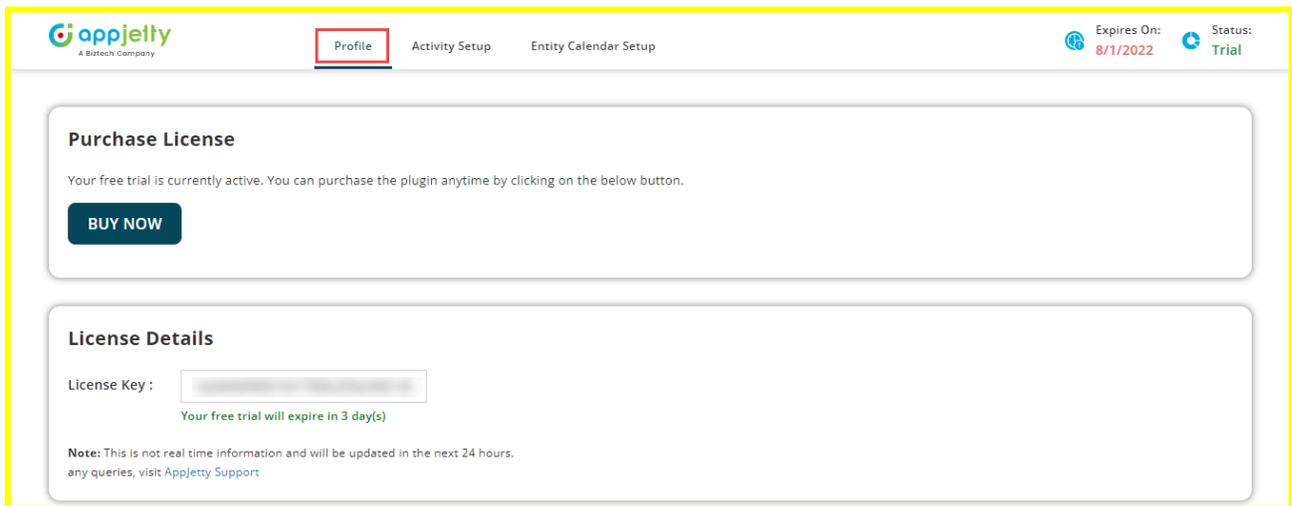
- Open **Calendar 365** app to configure the plugin with your license key.



- Go to the **Configuration**



- You can purchase the licensed version any time. Click on the **Profile** tab to purchase the license.



- Your trial will activate, and expiry date will be displayed on top.
- You can activate your 15 Days free trial. To get a 15 Days free trial license key fill out the details and click on 'ACTIVATE' button.

## Purchase License

Your free trial is currently active. You can purchase the plugin anytime by clicking on the below button.

**BUY NOW**

## License Details

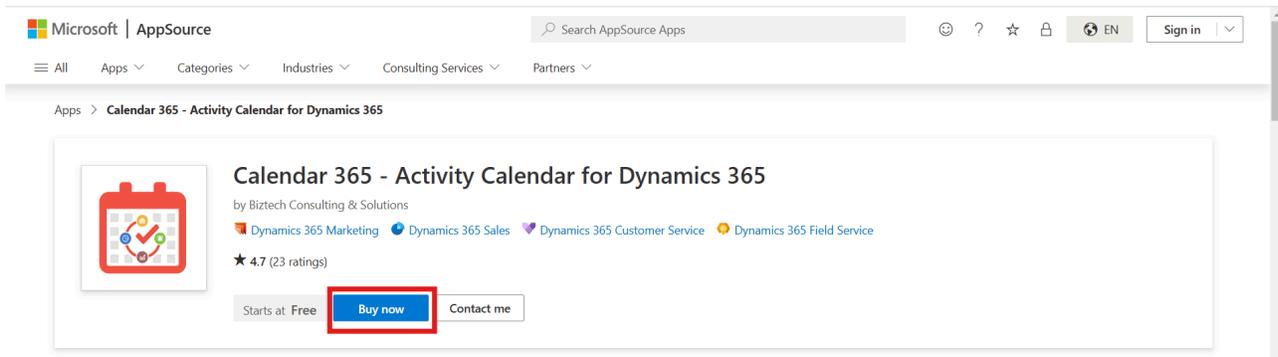
License Key :

**ACTIVATE**

Your free trial is expired

**Note:** This is not real time information and will be updated in the next 24 hours.  
any queries, visit [AppJetty Support](#)

- On expiration of Trial, a message will appear that the trial has expired. Now to purchase the license, click on '**Buy Now**' button.
- This will redirect you to our Msappsource page . You can complete the buy now process from the [Microsoft AppSource](#). Here click on **Buy now** and add required details.



The screenshot shows the Microsoft AppSource interface. At the top, there's a search bar and navigation links. The main content area displays the app 'Calendar 365 - Activity Calendar for Dynamics 365' by Biztech Consulting & Solutions. Below the app name, there are tags for 'Dynamics 365 Marketing', 'Dynamics 365 Sales', 'Dynamics 365 Customer Service', and 'Dynamics 365 Field Service'. A star rating of 4.7 (23 ratings) is shown. At the bottom of the app card, there are three buttons: 'Starts at Free', 'Buy now' (highlighted with a red box), and 'Contact me'.

- Upon successfully completing your purchase from Microsoft AppSource, please email a copy of your purchase invoice or a screenshot of the payment confirmation to [sales@appjetty.com](mailto:sales@appjetty.com) to initiate the key generation process and receive further assistance.
- After that, you will find the '**Activate**' button to activate your license. After submitting the valid license key, you will be navigated to the 'Setup' tab.
- After inserting the 'License Key', your Calendar 365 will be activated.
- Under the License Details, You can manage the **Users** as well.

## Manage Users

Total Allowed License User : 5  
Remaining License User : 3

- # AIBuilder\_StructuredML\_Prod\_CDS
- # AIBuilderProd
- # AppDeploymentOrchestration
- # AriaMdlExporter
- # BAP
- # BizQA

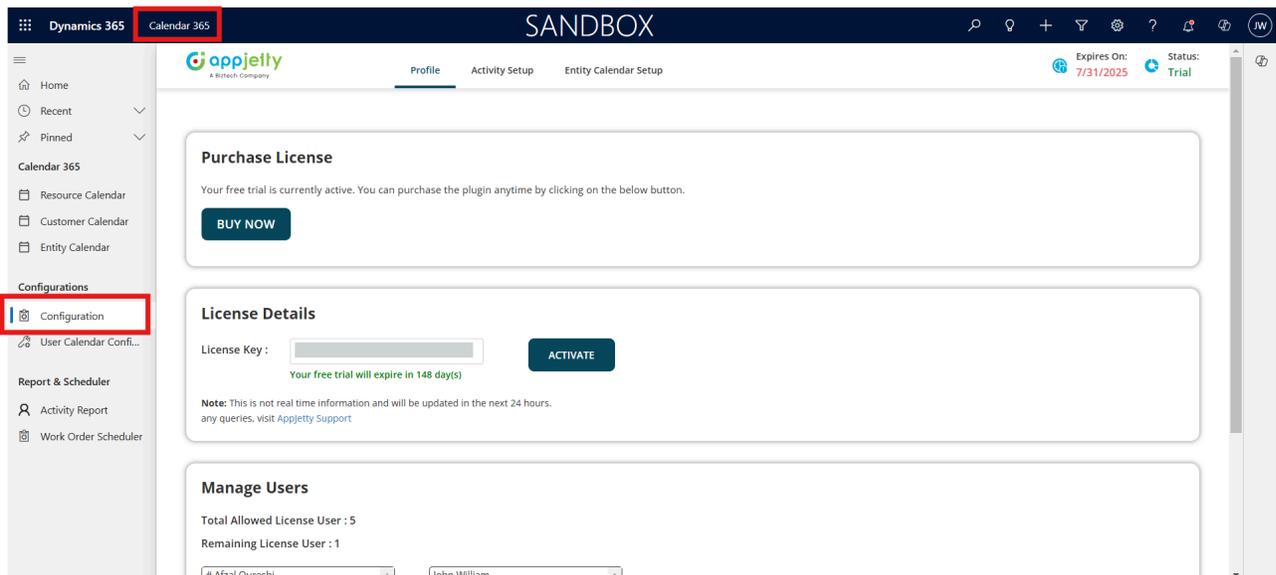
Prakash Bambhania  
John William

**SAVE**

- You can add the users by clicking in the right arrow > and remove the users by clicking on the left arrow <.

## How to update license key

- Open the Calendar365 app and go to the **Configuration**



The screenshot shows the Dynamics 365 Configuration page for the Calendar 365 app. The left sidebar is open, and the 'Configuration' option is highlighted with a red box. The main content area is titled 'SANDBOX' and contains three sections: 'Purchase License' with a 'BUY NOW' button, 'License Details' with a license key field and an 'ACTIVATE' button, and 'Manage Users' with a list of users including '# Afzal.Qureshi' and 'John William'.

- Inside the **Profile** tab, Click on **ACTIVATE** button to update your license.

Dynamics 365 | Calendar 365 | **SANDBOX** | Profile | Activity Setup | Entity Calendar Setup | Expires On: 7/31/2025 | Status: Trial | JW

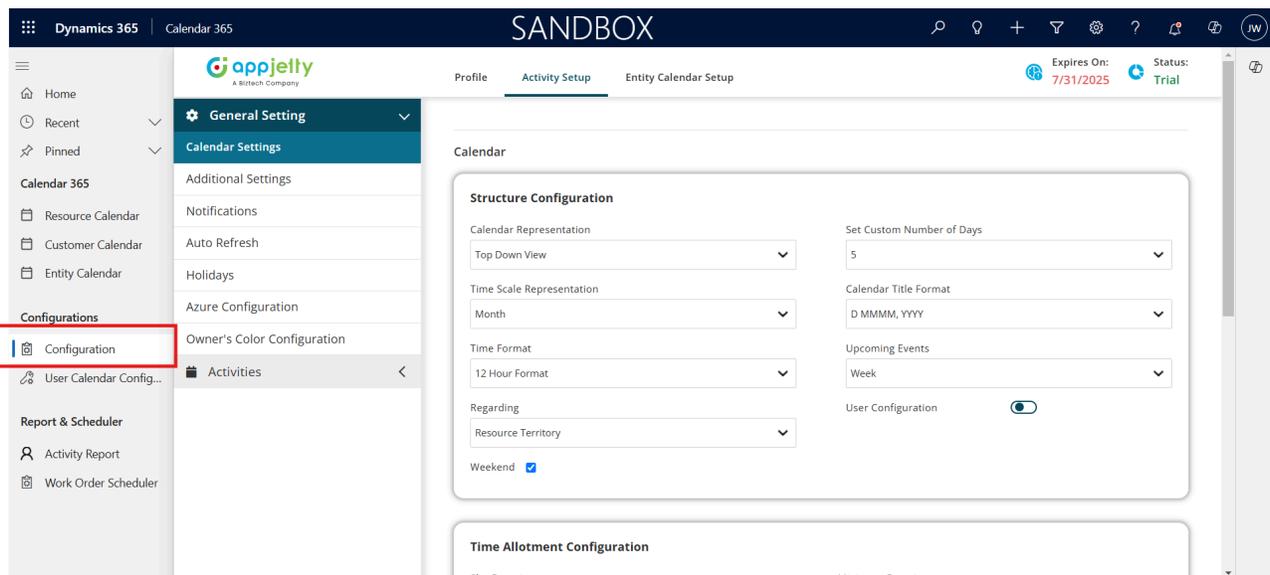
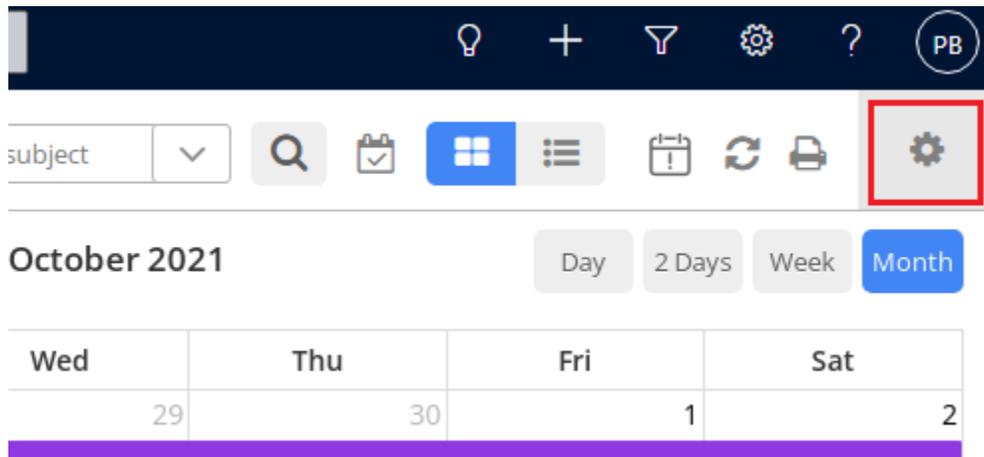
**Purchase License**  
Your free trial is currently active. You can purchase the plugin anytime by clicking on the below button.  
**BUY NOW**

**License Details**  
License Key :   
Your free trial will expire in 148 day(s)  
**ACTIVATE**  
**Note:** This is not real time information and will be updated in the next 24 hours. any queries, visit [Appjetty Support](#)

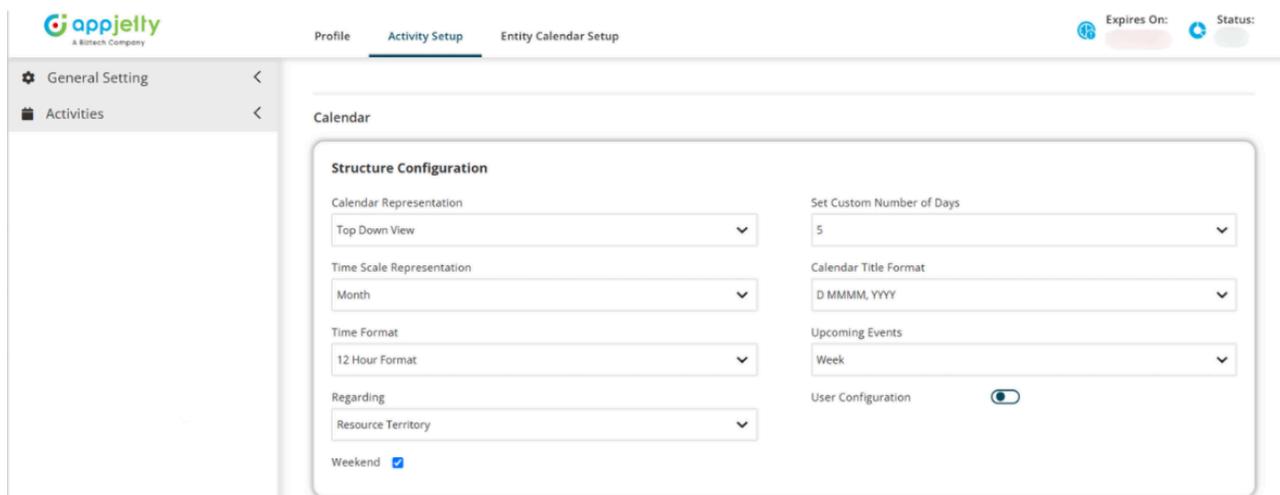
**Manage Users**  
Total Allowed License User : 5  
Remaining License User : 1  
# Afzal.Qureshi | John William

## Calendar 365 Configuration

- To configure the **Calendar 365** settings, click on the **'settings' (gear)** icon available on the calendar main page or you can also click on **Configuration**



- You will get the main three tabs: **Profile**, **Setup**, and **Entity Calendar**.



- **Profile:** You can check your activation (license) details and manage the Dynamics CRM users.
- **Activity Setup:** You can configure the default views and options for the calendar and CRM activities.
- **Entity Calendar:** You can configure the entity-specific calendar.

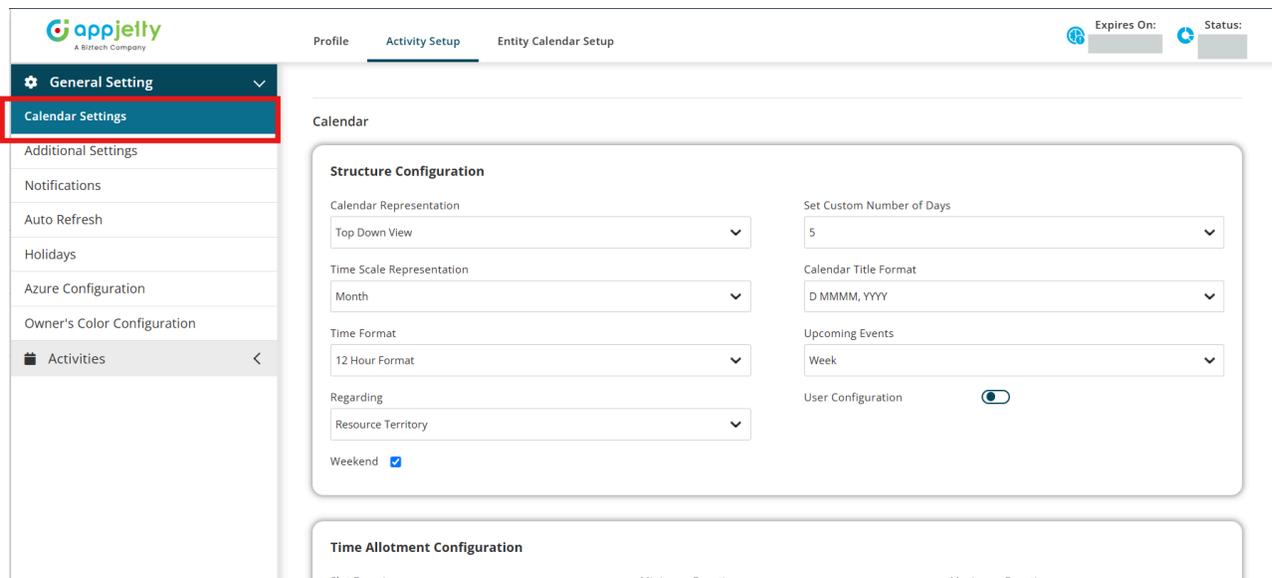
## Calendar 365- General Settings

- You will get the following sub-tabs under the “General Settings” to configure the activity and calendar view related settings:
  - Calendar Settings
  - Additional Settings
  - Notifications
  - Auto Refresh
  - Holiday
  - Azure Configuration
  - Owner’s Color Configuration

**Note:** User having System Administrator or AppJetty Calendar 365 Administrator roles can configure the Default Configuration Settings.

## Calendar Settings

- You can set up the calendar options and set default values for the activities.



- You can configure the following settings:

- **Calendar Representation:** You can set any of the Default representation of the calendar from the following:

> Gantt View > Top Down View > Timeline View > Agenda View

- **Time Scale Representation:** You can set the default Time Scale View of the calendar from the following:

> Day > Week > Month

- **Time Format:** Select the time format to display on the Calendar. Select **12 Hour Format** or **24 Hour Format**.

**Regarding:** You can set the default 'Lookup Record' entity.

**Weekend:** Checkmark this option to display the weekends on the calendar. Keep it **Disabled** if you want to display the 5-Day calendar.

- **Set Custom Number of Days:** Select the number of days in which you would like to view the calendar from the Day Span View.

- **Calendar Title Format:** Select the format to display on Calendar. The format that you select here will be displayed when you select Day, Day Span, and Week view for Calendar.

- **Upcoming Events:** You can select the default time span for the upcoming events to be shown in the calendar. You can select any of the default views for 'Upcoming Events' from the **Day, Week, or Month**.

- **User Configuration:** Enable this feature to apply the user-level setup (Logged In Account) to the calendar.
  - **Note:** If this feature is not enabled, then the global level set up will be applied to the calendar.

## Time Allotment Configuration

### Time Allotment Configuration

|               |                  |                  |
|---------------|------------------|------------------|
| Slot Duration | Minimum Duration | Maximum Duration |
| 30 Minutes    | 00               | 24               |

- **Slot Duration:** Select the slot durations for Day views from **15, 30, 45,60** and **90 Minutes**.
- **Minimum/Maximum Duration:** You can set the minimum/maximum time for the Calendar Time block in the Day/Week view. You can define the duration of availability or the Working Timings default.

By default, for Minimum value is **00:00** and the Maximum value is **24:00**. You can insert the availability hours of the day here.

## Activities Configuration

### Activities Configuration

|                        |                                     |                                     |
|------------------------|-------------------------------------|-------------------------------------|
| Activities Redirection | Overdue Activities                  | Activity Visibility                 |
| Pop-up View            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

- **Activities Redirection:** You can select the activity view redirection to view the activity details. You can decide where to navigate to check the activity details either in the **Popup View** or in the **CRM View**. 'Popup View' will display the activity details in the popup while the 'CRM View' will display the CRM form details.
  - **Overdue Activities:** By selecting 'Yes', the **expired activities** will be highlighted with a 'red' alert mark.

**Note:** The entities that are added from the setup page will be available in the calendar for users to select from.

**Activity Visibility:** If you have enabled this option, you can visualize the activities into the calendar that are set as required.

## Custom Configuration

### Custom Configuration

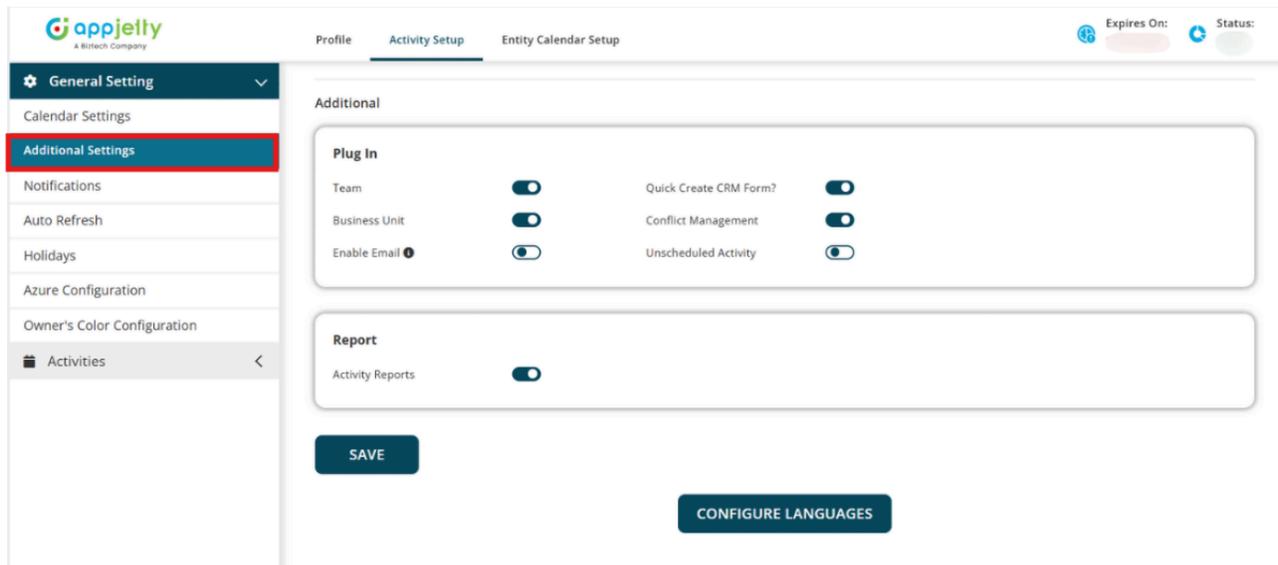
Contact Calendar

Account Calendar

- **Contact Calendar:** You can select entities related to the contact you want to include in the calendar. Entities related to contact are **Leads, Opportunity, Case, Quote, Sales Order, Invoice**.
- **Account Calendar:** You can select entities related to the account that you want to include in the calendar. Entities related to account are **Leads, Opportunity, Case, Quote, Sales Order, Invoice**.

After configuring the “Calendar Settings” click on the **Save** button.

## Additional Settings



- You can configure the additional settings related to the activities as below:
  - **Team:** By enabling the “Team”, you can display the “Team” resources of the default CRM under the ‘Resource’ tab of the Resource Calendar.
  - **Business Unit:** By enabling the “Business Unit”, you can display the “Business Unit” resources of the default CRM under the ‘Resource’ tab of the Resource Calendar.
  - **Enable Email:** You can enable the ‘Email’ option to send an Email to the Required/Optional attendees when the activity is created. Enable the switch to enable the Email facility. When the users add the appointment activity, the Email will be sent to the selected Required/Optional attendees (CRM Users/Teams).
  - **Quick Create Form:** You can enable this option to create an activity by navigating the CRM Backend page (CRM Form view). You will need to select the activity first and for inserting the details, the CRM Form view will open.

**Conflict Management:** To get alerts for conflicting activities based on time, check the Active box to enable **conflict management** in the calendar. On enabling conflict management, you get an alert message for each activity.

- **Unscheduled Activities:** To manage the unscheduled activities, check the Active box. By default, it is disabled. By enabling the Unscheduled Activities option, you get to manage unscheduled **appointments** and **service activities** without required **attendees** and **assigned resources** respectively from the calendar.

## Report

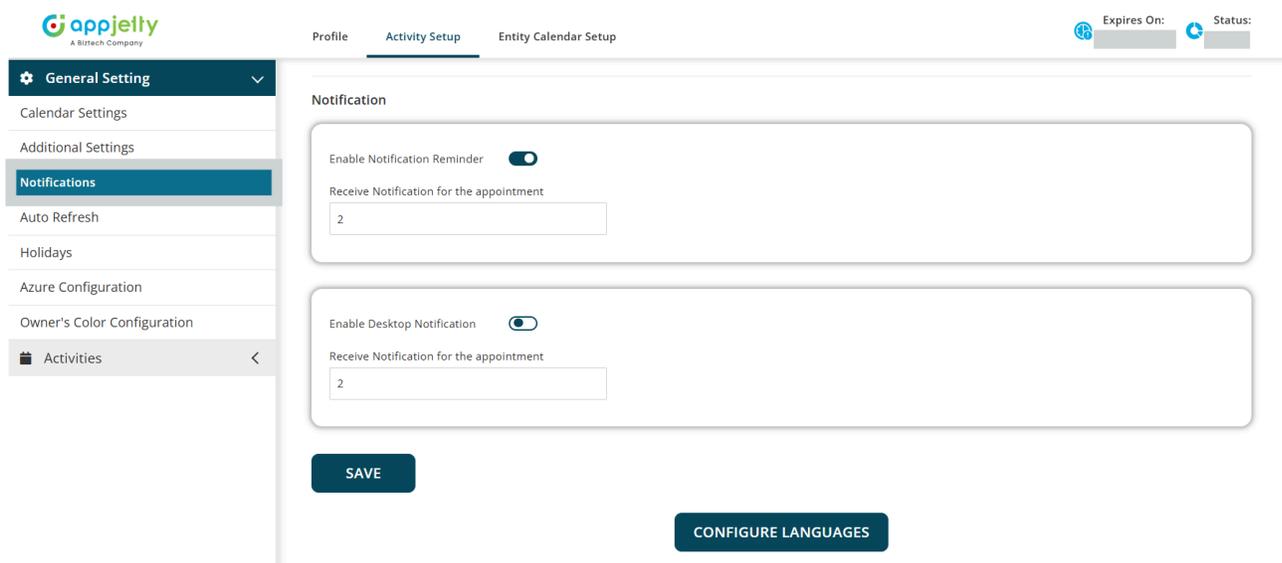
### Report

Activity Reports



- **Activity Report:** You can enable the “Activity Report” in the calendar to check and filter the activities as per the time duration and select the Users/Teams. Enable the switch to enable the Workload Report in the calendar view.
- After configuring the "**Additional Settings**", click on the **Save** button to apply the changes to the activity calendars.

## Notifications



The screenshot shows the appjetty settings interface. On the left is a sidebar menu with options: General Setting, Calendar Settings, Additional Settings, Notifications (highlighted), Auto Refresh, Holidays, Azure Configuration, Owner's Color Configuration, and Activities. The main content area is titled 'Notification' and contains two identical sections. Each section has a toggle for 'Enable Notification Reminder' (turned on) and a text input for 'Receive Notification for the appointment' with the value '2'. At the bottom of the settings area are 'SAVE' and 'CONFIGURE LANGUAGES' buttons. The top right of the page shows 'Expires On:' and 'Status:' fields.

**Enable Notification Reminder:** You will get the notification reminder about upcoming activity when you are on the Calendar page.

- **Receive Notification for the appointment:** Set the minutes to be notified just before starting the activity.

Enable Desktop Notification

Receive Notification for the appointment

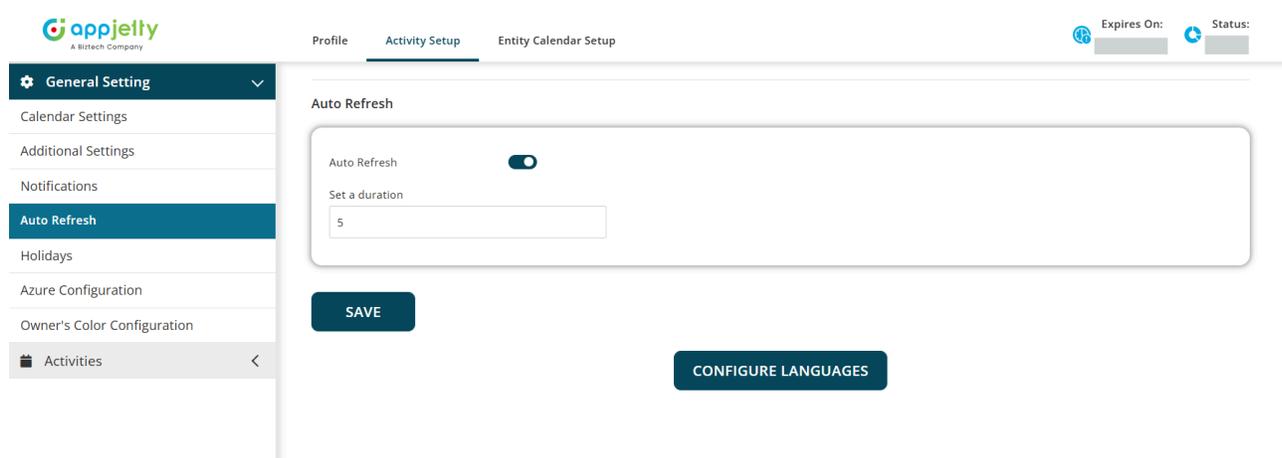
5

**Enable Desktop Notification:** You will get the notification reminder about upcoming activity as Desktop Notifications.

- **Receive Notification for the appointment:** Set the minutes to be notified just before starting the activity.

After configuring the “Notifications”, click on the **Save** button to apply the changes to the activity calendars.

## Auto Refresh



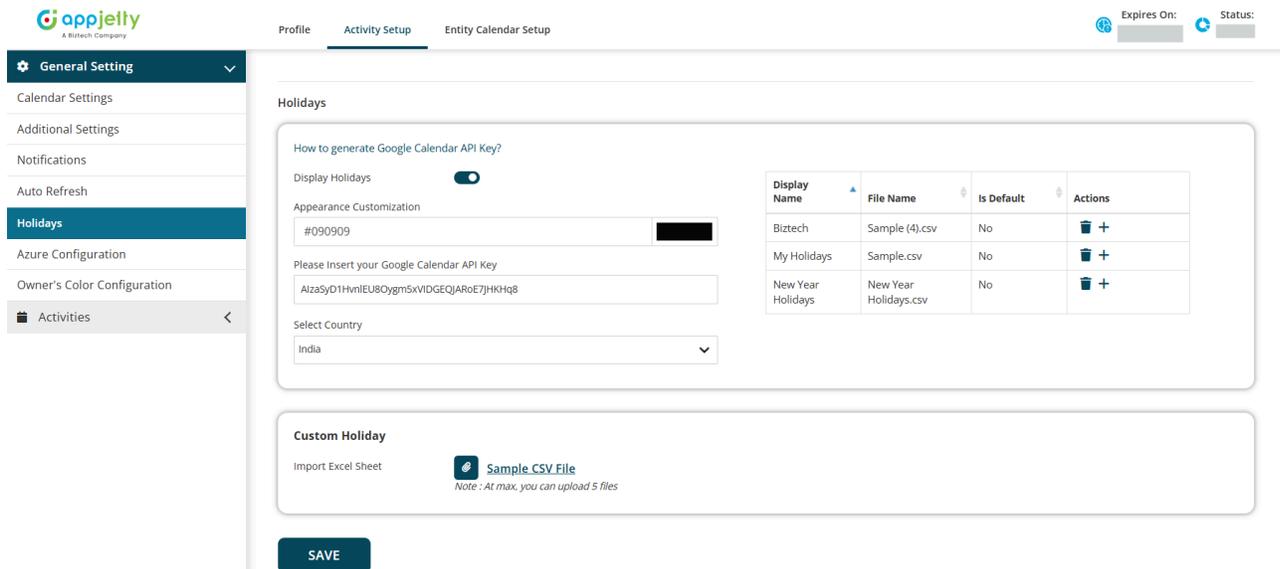
The screenshot shows the Appjetty user interface. On the left is a navigation menu with options: General Setting, Calendar Settings, Additional Settings, Notifications, Auto Refresh (highlighted), Holidays, Azure Configuration, Owner's Color Configuration, and Activities. The main content area is titled 'Auto Refresh' and contains a toggle switch for 'Auto Refresh' which is turned on, and a text input field labeled 'Set a duration' with the value '5'. Below these are two buttons: 'SAVE' and 'CONFIGURE LANGUAGES'. At the top right of the main area, there are fields for 'Expires On:' and 'Status:'.

You can now set up your map to Auto Refresh, without refreshing it manually. Navigate to the **Auto Refresh** section and configure the following details.

- **Auto Refresh:** Enable this option to refresh the resource and customer calendars.
- **Set a Duration:** Set the number of minutes you want to auto refresh the calendar.

After configuring the “Auto Refresh”, click on the **Save** button to apply the changes to the activity calendars.

# Holidays



Profile Activity Setup Entity Calendar Setup Expires On: Status:

General Setting  
Calendar Settings  
Additional Settings  
Notifications  
Auto Refresh  
**Holidays**  
Azure Configuration  
Owner's Color Configuration  
Activities

Holidays

How to generate Google Calendar API Key?

Display Holidays

Appearance Customization  
#090909

Please Insert your Google Calendar API Key  
AlzaSyD1HvnlEU8Oygm5xVIDGEQJARoE7JHK1Hq8

Select Country  
India

| Display Name      | File Name             | Is Default | Actions |
|-------------------|-----------------------|------------|---------|
| Biztech           | Sample (4).csv        | No         | 🗑️ +    |
| My Holidays       | Sample.csv            | No         | 🗑️ +    |
| New Year Holidays | New Year Holidays.csv | No         | 🗑️ +    |

Custom Holiday

Import Excel Sheet [Sample CSV File](#)  
*Note : At max, you can upload 5 files*

SAVE

- To manage the holidays, click on the **'Holidays'** section and configure the following details:

**Display Holidays:** Enable this option to display the holidays.

**Appearance Customization:** Set the color to be displayed for the Holiday in the calendar using the color picker tool.

**Google Calendar API Key:** Insert the Google Calendar API Key.

**Select Country:** Select the country whose holidays are to be displayed in the calendar.

After configuring the "Holidays", click on the **Save** button to apply the changes to the activity calendars.

## Custom Holiday

### Custom Holiday

Import Excel Sheet



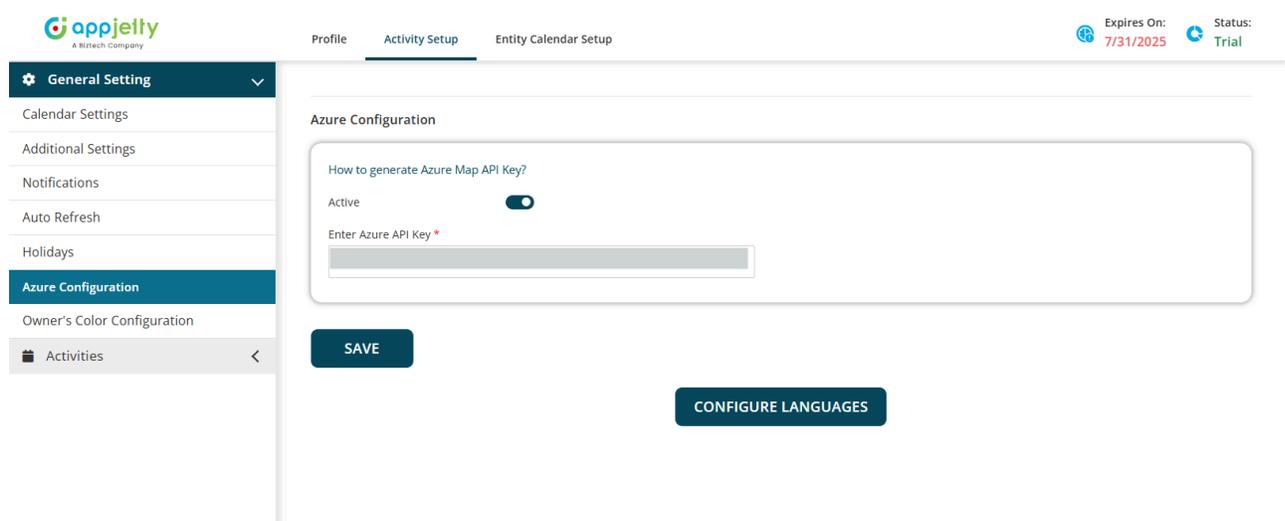
[Sample CSV File](#)

*Note : At max, you can upload 5 files*

**Import Excel Sheet:** You can import the CSV file of the holidays and display it into the calendar. You need to follow the Sample CSV File format to upload the CSV file here. You can also download the Sample CSV File for the reference.

After configuring the “Custom Holidays”, click on the **Save** button to apply the changes to the activity calendars.

## Azure Configuration

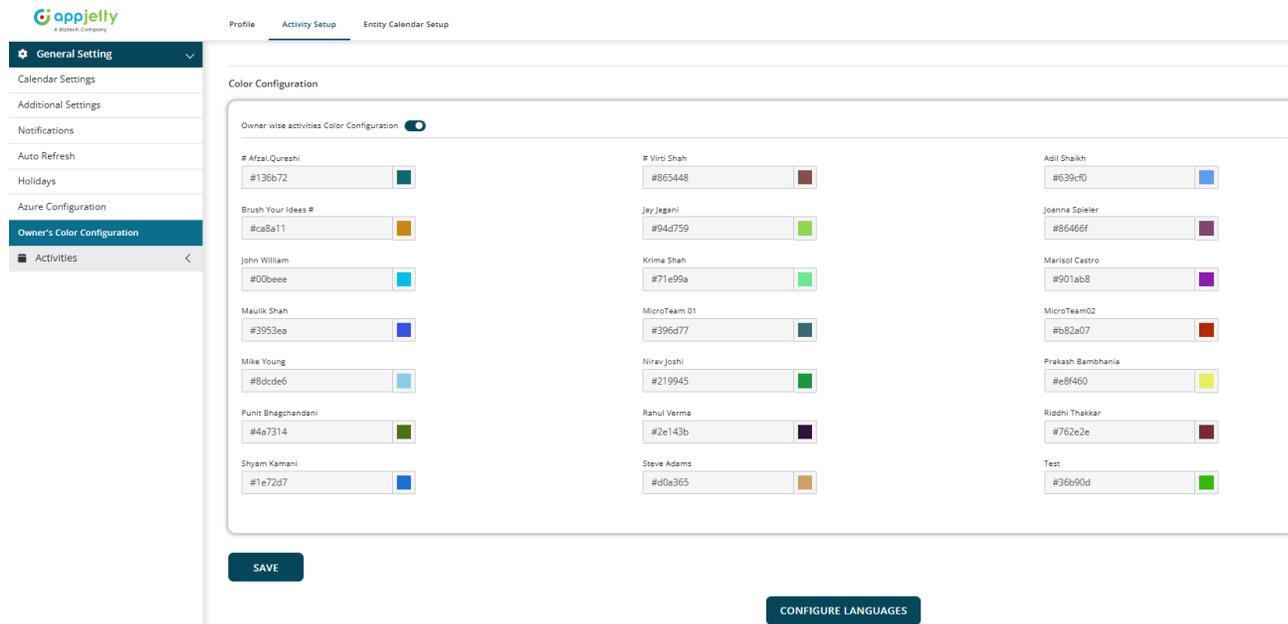


The screenshot shows the Appjetty user interface. At the top left is the Appjetty logo. The top navigation bar includes 'Profile', 'Activity Setup', and 'Entity Calendar Setup'. On the right, it shows 'Expires On: 7/31/2025' and 'Status: Trial'. A left sidebar menu is open, showing 'General Setting' (expanded) with sub-items: 'Calendar Settings', 'Additional Settings', 'Notifications', 'Auto Refresh', 'Holidays', 'Azure Configuration' (highlighted), 'Owner's Color Configuration', and 'Activities'. The main content area is titled 'Azure Configuration' and contains a section 'How to generate Azure Map API Key?'. Below this is an 'Active' toggle switch which is turned on. There is a text input field labeled 'Enter Azure API Key \*'. At the bottom of the configuration area are two buttons: 'SAVE' and 'CONFIGURE LANGUAGES'.

To use the **Work order Scheduler** feature, **Active** this and add the **Azure API Key**

After configuring the “Azure Configuration”, click on the **Save** button to apply the changes to the activity calendars.

## Owner's Color Configurations

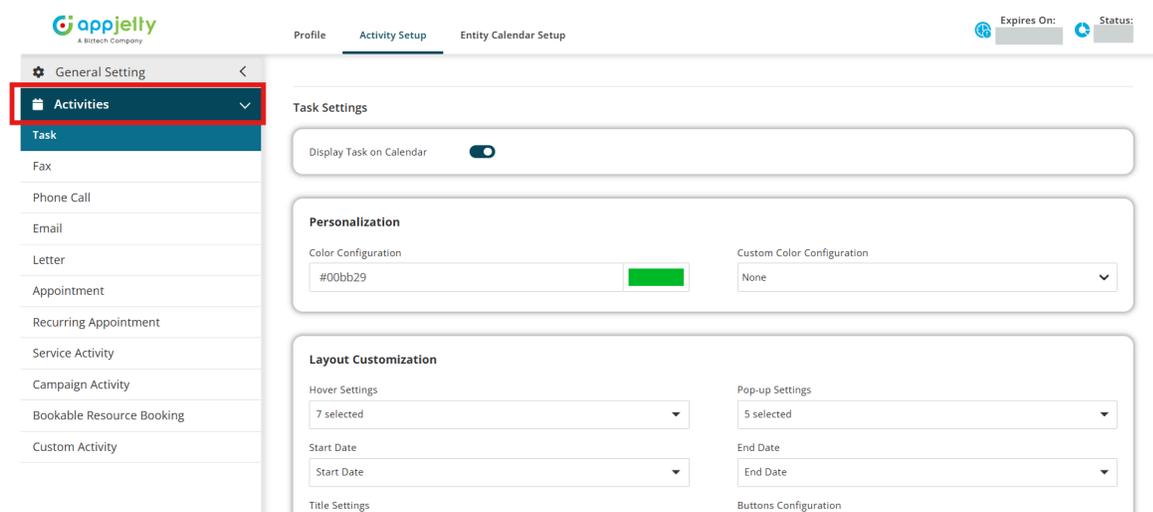


The screenshot shows the 'Owner's Color Configuration' page. On the left, there is a sidebar menu with 'General Setting' expanded, and 'Owner's Color Configuration' selected. The main content area is titled 'Color Configuration' and features a toggle for 'Owner wise activities Color Configuration' which is turned on. Below this, there is a grid of 24 users, each with a name, ID, and a color picker. The users listed are: # Afzal.Qureshi (#136b72), # Viri Shah (#865448), Adil Shaikh (#639cf0), # Brush Your Ideas # (#ca8a11), Jay Jagani (#94d759), Joanna Spieler (#86466f), John William (#00beee), Krima Shah (#71e99a), Marisol Castro (#901ab8), Maulik Shah (#3953ea), MicroTeam 01 (#396d77), MicroTeam02 (#b82a07), Mike Young (#8dcd66), Nirav Joshi (#219945), Prakash Bambhaniya (#e8f460), Punit Bhagchandani (#4a7314), Rahul Verma (#2e143b), Ridhi Thakkar (#762e2e), Shyam Kamani (#1e72d7), Steve Adams (#d0a365), and Test (#36a90d). A 'SAVE' button is located at the bottom left of the configuration area, and a 'CONFIGURE LANGUAGES' button is at the bottom right.

To define the color of the activities based on owner that is CRM users. By enabling this option, you can differentiate the user wise activities in different color on the calendar.

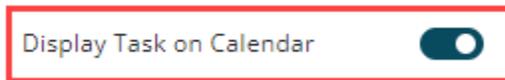
- By 'selecting' the Owner Active checkbox, you will navigate to the Owner's color Configuration.
- You will get the list of the CRM Users. Using the 'Color picker', you can choose the color for the specific users.
- After selecting the color for the users, click on the **Save** button to save the configuration.

## Activities



The screenshot shows the 'Activities' settings page. The 'Activities' menu item in the sidebar is highlighted with a red box. The main content area is titled 'Task Settings' and includes a toggle for 'Display Task on Calendar'. Below this, there is a 'Personalization' section with 'Color Configuration' set to '#00bb29' and 'Custom Color Configuration' set to 'None'. The 'Layout Customization' section includes 'Hover Settings' (7 selected), 'Pop-up Settings' (5 selected), 'Start Date' (Start Date), and 'End Date' (End Date). There are also 'Title Settings' and 'Buttons Configuration' sections at the bottom.

- It will include tabs for Task, Fax, Phone Call, Email, Letter, Appointment, Recurring Appointment, Service Activity, Campaign Activity, Bookable Resource Booking and Custom Activity. You can configure all the activities individually.
- Each of the activity tab will contain following fields:



**Enable:** You can enable the activity to display any activity in the calendar by default.

## Personalization

### Personalization

Color Configuration

Custom Color Configuration

 ▼

**Color Configuration:** You can select the default color for the activity to be displayed in the calendar.

**Custom Color Configuration:** You can select the custom color configuration from “None”, “By Status” or “By Priority”.

## Layout Customization

### Layout Customization

Hover Settings

 ▼

Start Date

 ▼

Title Settings

 ▼

Pop-up Settings

 ▼

End Date

 ▼

Buttons Configuration

Convert To Opportunity     Convert To Case  
 Mark As Complete     Mark As Cancel

**Hover Settings:** Select the field to be displayed whenever someone hovers on the Calendar event.

**Start Date:** View the activities on the calendar based on the selection of its action. Select the action for the Start Date.

**Title Settings:** You can select the **title attribute** to be displayed as the **title** of activity in the calendar. The 'Title Attribute' comes with the default selection of the **Subject** attribute. You can select only one attribute from the list of different attributes.

**Pop-up Settings:** Select the field to be displayed whenever someone clicks on the Calendar event.

**End Date:** View the activities on the calendar based on the selection of its action. Select the action for the End Date.

**Buttons Configuration:** Select the action buttons that you need to include in the calendar. These action buttons are the ones which if enabled lets you perform those actions directly from the calendar.

### Action Buttons (Buttons Conf.)

- All the following activities have different action buttons to perform:
- Here activities like Task, Fax, Phone Call, Letter, Appointment, Service Activity, Custom Activity have actions buttons for:

> Convert to Opportunity

> Convert to Case

> Mark as Complete

> Mark as Cancel

**Note:** Different activities will have different action buttons (button configurations). You will get the Buttons Configuration as per the configuring the specific activity.

- All the following activities have different action buttons to perform:

**Email Activity:** 'Email' has **Convert to the Lead** button.

#### Buttons Configuration

Convert To Opportunity

Convert To Case

Convert To Lead

**Recurring Appointment:** 'Recurring Appointment' activity has an **End Series** button in addition.

#### Buttons Configuration

Convert To Opportunity

Convert To Case

End Series

**Campaign Activity:** 'Campaign activity' has a **Close Campaign Activity** button in addition.

#### Buttons Configuration

Close Campaign Activity

**Bookable Resource Booking:** 'Bookable Resource Booking' has an **Activate** and **Deactivate** button.

### Buttons Configuration



Activate



Deactivate

After configuring all the activities, click on the **Save** button to save the configuration.

## Entity Calendar

- You will have the Entity Calendar to get the entity-specific activity records in the calendar.

## Structure Configuration

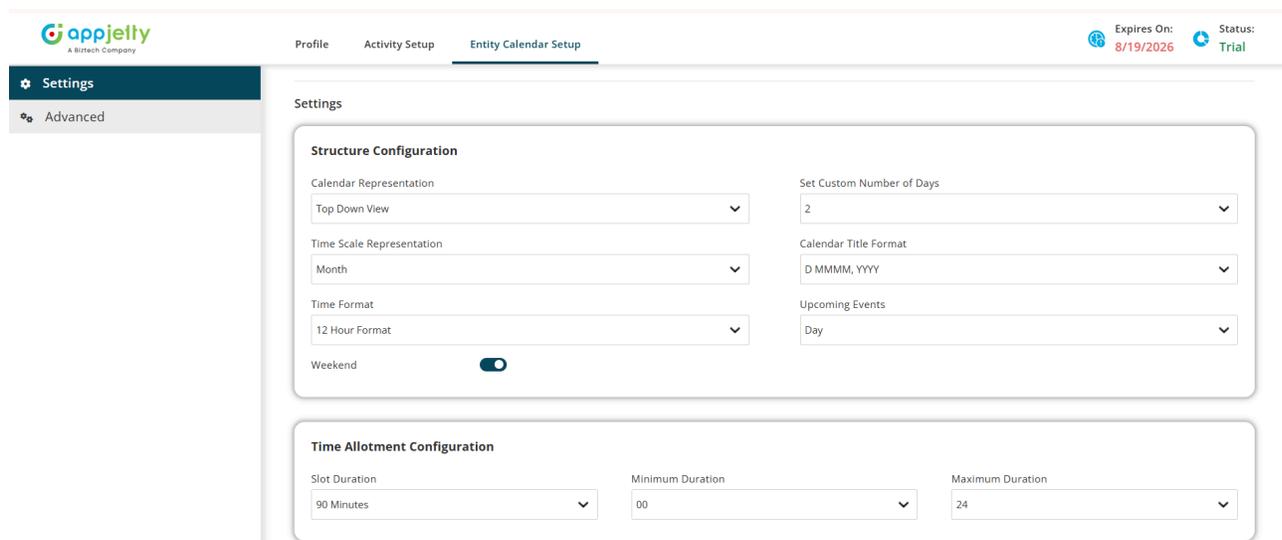
- Configure the default view of the Entity calendar under the **'Views'** section. By configuring the individual setups/options, you can define the view of the Entity Calendar.
- You can configure the following settings:

- Calendar Representation:** You can set any of the Default Calendar View of the calendar from the following:

> Gantt View   > Top Down View   > Timeline View   > Agenda View

- Time Scale Representation:** You can set the default Time Scale Representation of the calendar from the following:

> Day   > Week   > Month



The screenshot shows the 'Entity Calendar Setup' configuration page in the appjetty interface. The page is divided into two main sections: 'Structure Configuration' and 'Time Allotment Configuration'.

**Structure Configuration:**

- Calendar Representation:** Top Down View
- Time Scale Representation:** Month
- Time Format:** 12 Hour Format
- Weekend:**
- Set Custom Number of Days:** 2
- Calendar Title Format:** D MMMM, YYYY
- Upcoming Events:** Day

**Time Allotment Configuration:**

- Slot Duration:** 90 Minutes
- Minimum Duration:** 00
- Maximum Duration:** 24

The interface includes a sidebar with 'Settings' and 'Advanced' options, and a top navigation bar with 'Profile', 'Activity Setup', and 'Entity Calendar Setup' tabs. A trial status is visible in the top right corner, indicating the trial expires on 8/19/2026.

- **Time Format:** Select the time format to display on Calendar. Select **12 Hour Format** or **24 Hour Format**.

**Weekend:** Checkmark this option to display the weekends to the calendar. Keep it disabled if you want to display the 5-Day calendar.

**Set Custom Number of Days:** Select the number of days in which you would like to view the calendar from the Day Span View.

- **Calendar Title Format:** Select the format to display on Calendar. The format that you select here will be displayed when you select Day, Day Span, and Week view for Calendar.
- **Upcoming Events Duration:** You can select the default time span for the upcoming events to be shown in the calendar. You can select any of the default views for 'Upcoming Events' from the **Day, Week, or Month**.

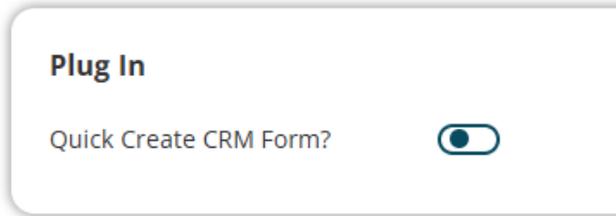
## Time Allotment Configuration

### Time Allotment Configuration

|               |                  |                  |
|---------------|------------------|------------------|
| Slot Duration | Minimum Duration | Maximum Duration |
| 90 Minutes ▼  | 08 ▼             | 20 ▼             |

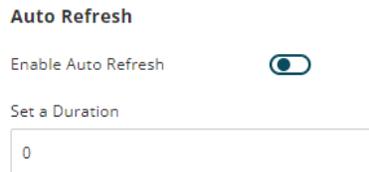
- **Slot Duration:** Select the slot durations for Day views from **15, 30, 45, and 60 Minutes**.
- **Minimum/Maximum Duration:** You can set the minimum/maximum time for the Calendar Time block in the Day / Week view. You can define the duration of availability or the Working Timings default.  
By default, for Minimum value is **00:00** and the Maximum value is **24:00**. You can insert the availability hours of the day here.

## Plug In



- **Quick Create Form:** You can enable this option to create an activity by navigating the CRM Backend page (CRM Form view). You will need to select the activity first and for inserting the details, the CRM Form view will open.

## Auto Refresh



- You can now set up your map to Auto Refresh, without refreshing it manually. Navigate to the **Auto Refresh** section and configure the following details.
- **Auto Refresh:** Enable this option to refresh the resource and customer calendars.
- **Set a Duration:** Set the number of minutes you want to auto refresh the calendar.

## Advanced

- After configuring the **Settings** of the Entity Calendar, you can configure the **Advanced** configuration of the Entity Calendar.
- Under this section, you can configure the CRM Entities to display on the calendar of Calendar 365. You need to configure the attributes and details of the entity to display on the calendar.
- If the entity is already created, you will get on the list. By default, you will get the **Personalization**, **Layout Customization**, and **Custom Customization** options.

Advanced Setting

**Details** + CREATE

| Entity | Entity Calendar Name | Actions                             |
|--------|----------------------|-------------------------------------|
| Case   | Case By Contact      | <a href="#">✎</a> <a href="#">🗑</a> |
| Lead   | Lead By Customer     | <a href="#">✎</a> <a href="#">🗑</a> |

Showing 1 to 2 of 2 entries Previous 1 Next

**Personalization**

Entity: Microsoft Entra ID Entity Calendar Name \*

Default Color: #178d1e

Custom Color Configuration: None

---

**Layout Customization**

Hover Settings: Display Name Pop-up Settings: Display Name

Start Date \*: Select End Date \*: Select

## Personalization

**Personalization**

Entity

[Deprecated] Dyn... ▼

Default Color

#178d1e

Custom Color Configuration

Component State ▼

Entity Calendar Name \*

Test Calendar

Published

Unpublishe

Deleted

Deleted Unpublishe

- **Entity:** Select the CRM Entity to create an Entity calendar for that. You will get the Entity's drop-down list.
- As you select the entity from the list, the default attributes & fields will be selected based on which Entity is selected.
- **Entity Calendar Name:** Insert the relevant Calendar name to identify.

- **Default Color:** You can select the entity color to identify on the calendar. Choose the relevant color for the entity from the Color Picker tool.

### Personalization

Entity

Entity Calendar Name \*

Default Color

Published

Unpublishe

Deleted

Deleted Unpublishe

Custom Color Configuration

None

**Component State**

- **Custom Color Configuration:** You can select Fields of the Entity to display the entity as per the Field's values in a different color.
- Ex. If you have selected the field “**Component State**” of the entity, you can select the color for its Fields **Published**, **Unpublished**, **Deleted**, and **Deleted Unpublished**.

## Layout Customization

### Layout Customization

Hover Settings

Pop-up Settings

Start Date \*

End Date \*

Title Settings

**Hover Settings:** Select the field to be displayed whenever someone hovers on the Calendar event.

**Pop-up Settings:** Select the field to be displayed whenever someone clicks on the Calendar event.

- **Start Date:** View the entity records on the calendar based on the selection of its action. Select the action for the Start Date. *i.e.*, Created On
- **End Date:** View the entity records on the calendar based on the selection of its action. Select the action for the End Date. *i.e.*, Actual Close Date
  - **Title Attribute:** You can select the title attribute to be displayed as the title of entity records in the calendar.
  - The 'Title Attribute' comes with the default selection of the Name attribute. You can select only one attribute from the list of different attributes.

## Custom Customization

### Custom Customization

Form Attribute

All selected (2)
▼

Search By Attribute

Name
▼

Filter By

Created By
▼

Share Calendar

Public
  Private

**Form Attribute:** Select the fields which will be visible to the user while Creating/Editing/Copying the event.

- **Filter By:** Select an attribute to filter the entity records as per which attribute. *i.e.*, Created By
  - For the Activity entity, when we select Regarding, all the related entities will appear, and we can select any one of them.

### Custom Customization

Form Attribute

4 selected
▼

Filter By

Regarding
▼

Regarding Entity

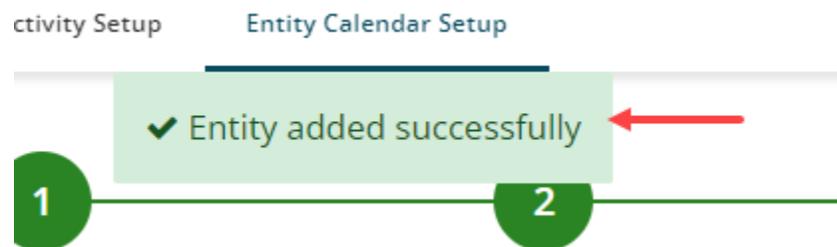
account
▼

- **Search by Attribute:** Select the attribute to search the entity records by inserting the text in the entity calendar.

- **Share Calendar:** While creating the entity with attribute configuration, at that time you can decide whether you want to share with everyone or need to share with the specific CRM users/teams. If you enable the **Public**, it will be shared with everyone. But if you enable the **Private**, you need to select the CRM users/teams from the dropdown list.

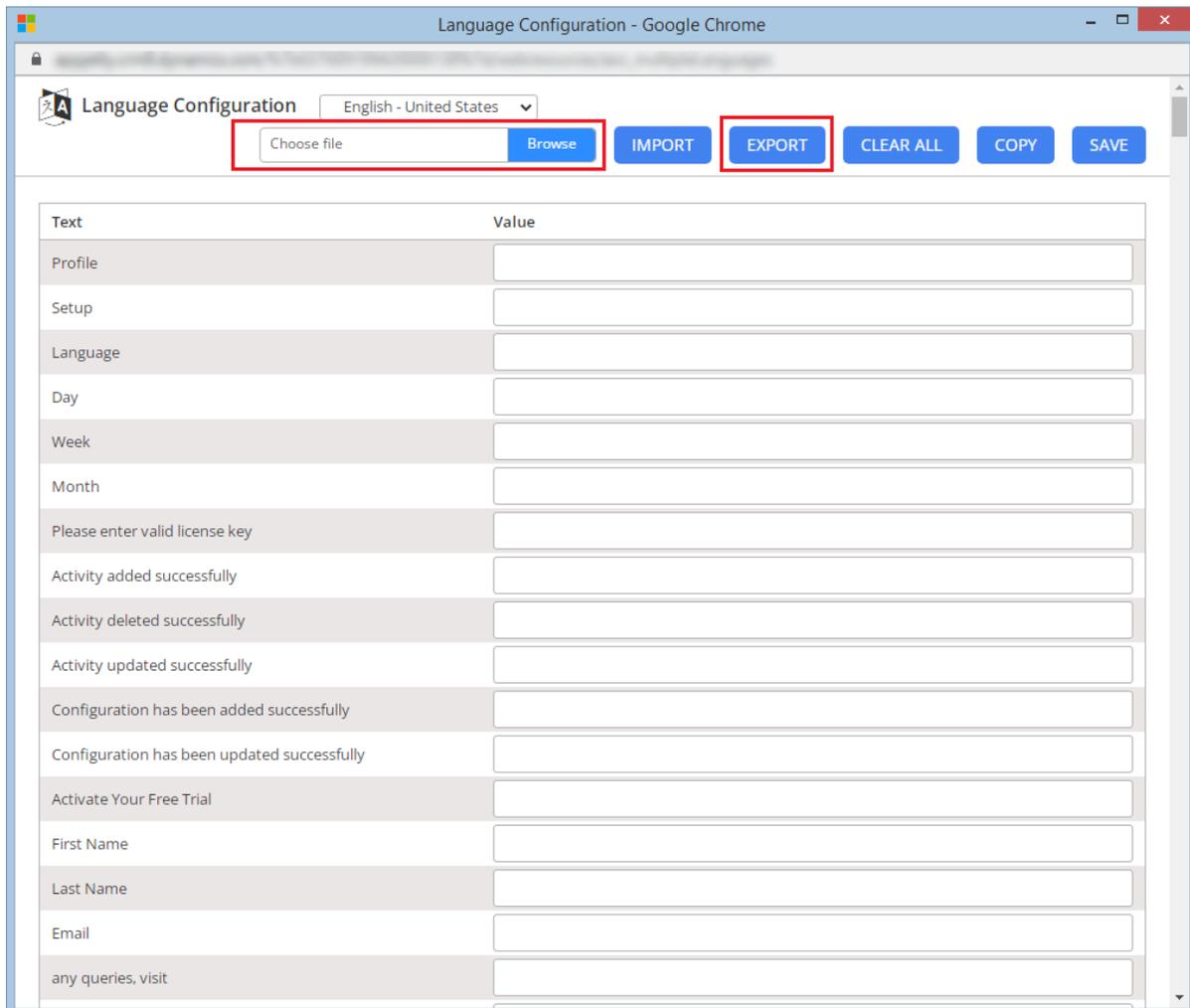
Once the attributes & required fields are selected for the Entity calendar, click on the **Save** button.

- You will get the alert message that the entity for the calendar is added and that the Entity to display in the calendar will be listed.



## Configure Languages

- You can also configure the language of Calendar 365 content (messages) as per requirement. By clicking on the **Configure Languages** button, the “Language Configuration” tab will open.



| Text  | Value |
|---|-------|
| Profile                                     |       |
| Setup                                       |       |
| Language                                    |       |
| Day   |       |
| Week  |       |
| Month                                       |       |
| Please enter valid license key              |       |
| Activity added successfully                 |       |
| Activity deleted successfully               |       |
| Activity updated successfully               |       |
| Configuration has been added successfully   |       |
| Configuration has been updated successfully |       |
| Activate Your Free Trial                    |       |
| First Name                                  |       |
| Last Name                                   |       |
| Email                                       |       |
| any queries, visit                          |       |

- You will have options to import the translated CSV file. You can download the CSV file with the messages by clicking on the **Export** button.

|    | A   | B                                       | C | D | E |
|----|---|---|---|---|---|
| 1  | Text                                      | Value                                   |   |   |   |
| 2  | Profile                                   | profil                                  |   |   |   |
| 3  | Setup                                     | Installer                               |   |   |   |
| 4  | Language                                  | Langue                                  |   |   |   |
| 5  | Day                                       | Jour                                    |   |   |   |
| 6  | Week                                      | La semaine                              |   |   |   |
| 7  | Month                                     | Mois                                    |   |   |   |
| 8  | Please en                                 | Veillez saisir la clé de licence valide |   |   |   |
| 9  | Activity ac                               | Activité ajoutée avec succès            |   |   |   |
| 10 | Activity de                               | Activité supprimée avec succès          |   |   |   |
| 11 | Activity up                               | Activité mise à jour avec succès        |   |   |   |
| 12 | Configuration has been added successfully |   |   |   |   |

- In the CSV (Excel) file, you will have default messages in the “Text” column and the translated content in the “Value” column. Translate all the messages manually.

- Once the translation is completed, upload the CSV file and select the language from the Language Configuration drop-down. Here, the **French - France** language is selected.


**Language Configuration**
French - France
multilanguage-data.csv
Browse
IMPORT
EXPORT
CLEAR ALL
COPY
SAVE

| Text                           | Value                |
|--------------------------------|----------------------|
| Profile                        | <input type="text"/> |
| Setup                          | <input type="text"/> |
| Language                       | <input type="text"/> |
| Day                            | <input type="text"/> |
| Week                           | <input type="text"/> |
| Month                          | <input type="text"/> |
| Please enter valid license key | <input type="text"/> |
| Activity added successfully    | <input type="text"/> |
| Activity deleted successfully  | <input type="text"/> |
| Activity updated successfully  | <input type="text"/> |

- Once the CSV file is uploaded, you need to click on the **Import** button to add the translated messages for the selected language


**Language Configuration**
French - France

Browse
IMPORT
EXPORT
CLEAR ALL
COPY
SAVE

| Text                           | Value                                   |
|--------------------------------|---|
| Profile                        | profil                                  |
| Setup                          | Installer                               |
| Language                       | Langue                                  |
| Day                            | Jour                                    |
| Week                           | La semaine                              |
| Month                          | Mois                                    |
| Please enter valid license key | Veillez saisir la clé de licence valide |
| Activity added successfully    | Activité ajoutée avec succès            |
| Activity deleted successfully  | Activité supprimée avec succès          |
| Activity updated successfully  | Activité mise à jour avec succès        |

- After importing the translated message, click on the **Save** button to save the translation for the selected language.

**Note:** For configuring languages, the user first needs to manage language settings from CRM. Languages that are selected in CRM can be configured for the calendar.

## Other Configuration for Calendar 365

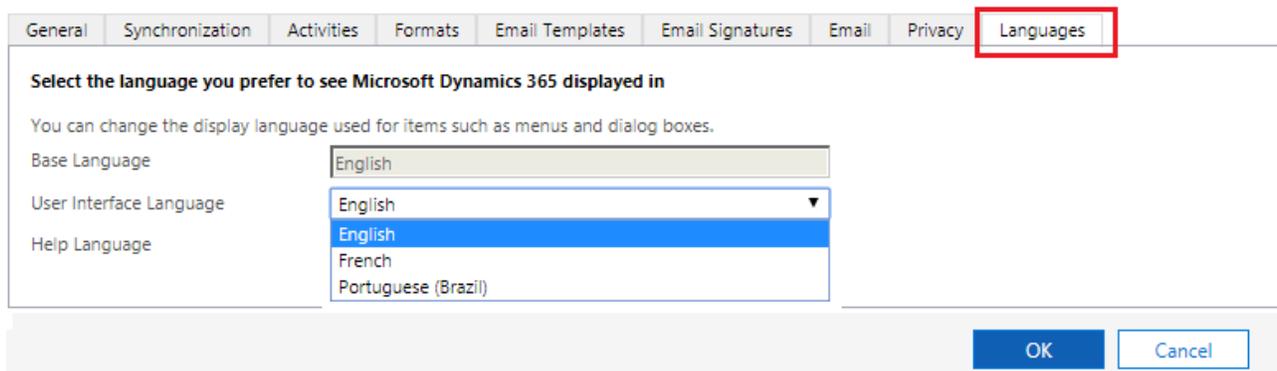
### Multi-language Calendar labels

- You can select the different languages for the labels of the default CRM on Calendar365.
- Navigate to **Settings** → **Personalization Settings** → select the Language Tab. From here, select the language for the User Interface in which you want to see the labels for Calendar 365.

## Set Personal Options

? X

Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.



- After selecting the language, click the **OK** button to save the settings. Now, you can see the labels in Calendar 365 as per the selected language.

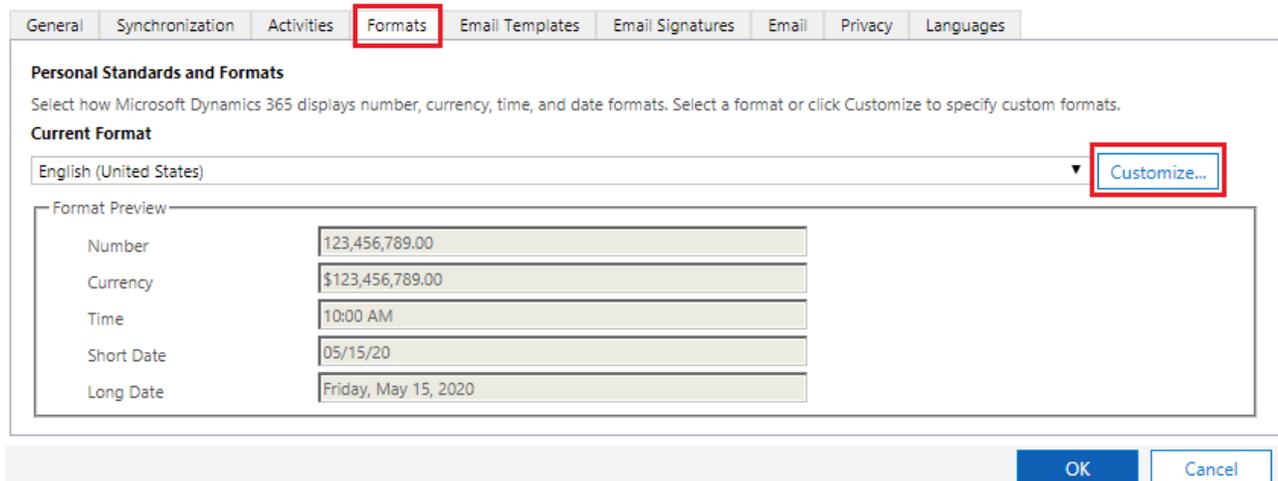
### Dynamic Date Formats

- Navigate to **Settings** → **Personalize Settings** → **Formats** to select the **Date & Time Format** to display in the date & time picker of the Calendar 365.

## Set Personal Options

? X

Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.



- Now click on the **Customize** button, the Customize Regional Options window will open.

- You can select the Date Format i.e. MM/DD/YY or DD/MM/YY and Separator.

## Customize Regional Options

Change the format for number, currency, time and date.

Number

Currency

Time

Date

Show week numbers on Calendar views

**Short Date**

Short Date Format:

Date Separator:

Short Date Preview:

**Long Date**

Long Date Format:

Long Date Preview:

Reset

OK

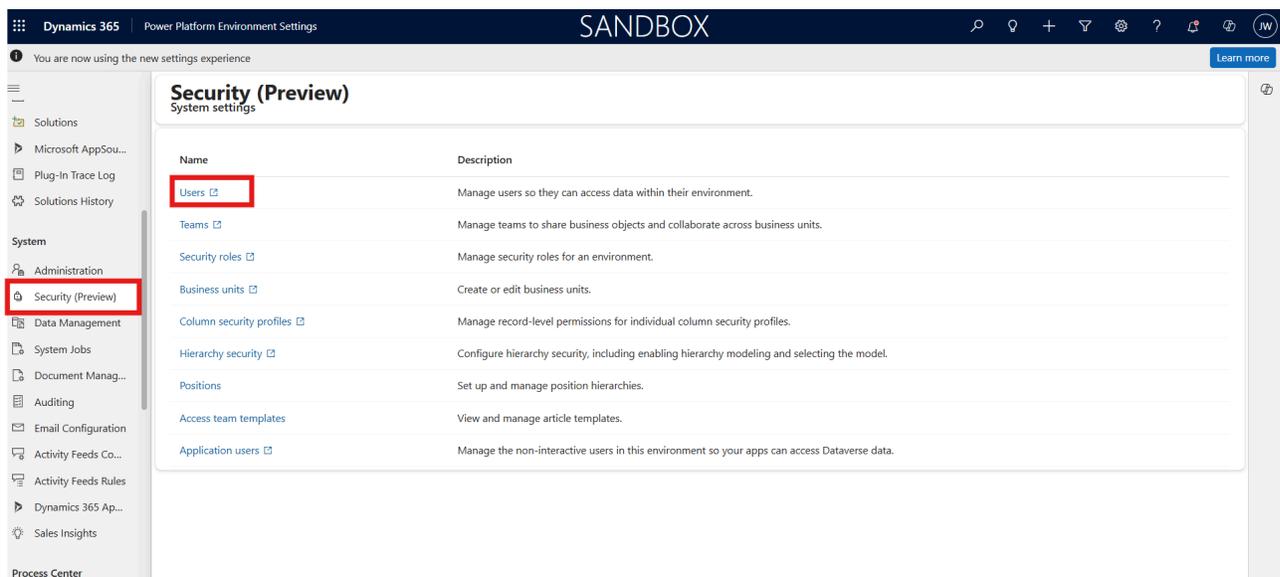
Cancel

Apply

- Based on the format selection here, you will get the date format in date picker of Calendar365.

## Assign User Role

- To manage the user roles, navigate to **Settings -> Security -> Users**.



The screenshot shows the Dynamics 365 interface with the 'Security (Preview)' settings page open. The left-hand navigation pane is visible, with 'Security (Preview)' highlighted. The main content area displays a table of security settings:

| Name                                     | Description  |
|--|--|
| <a href="#">Users</a>                    | Manage users so they can access data within their environment.                               |
| <a href="#">Teams</a>                    | Manage teams to share business objects and collaborate across business units.                |
| <a href="#">Security roles</a>           | Manage security roles for an environment.  |
| <a href="#">Business units</a>           | Create or edit business units.   |
| <a href="#">Column security profiles</a> | Manage record-level permissions for individual column security profiles.                     |
| <a href="#">Hierarchy security</a>       | Configure hierarchy security, including enabling hierarchy modeling and selecting the model. |
| <a href="#">Positions</a>                | Set up and manage position hierarchies.  |
| <a href="#">Access team templates</a>    | View and manage article templates.   |
| <a href="#">Application users</a>        | Manage the non-interactive users in this environment so your apps can access Dataverse data. |

- You will get the list of the users (CRM Users).

Biztech IT Consultancy Pvt. Ltd.2 > Settings > Users

Manage users so they can access data within their environment. This list includes users with disabled and enabled statuses. [Learn more](#)

Looking for application users? Click here to go to the [app users list](#)

To validate user permissions for specific app(s), go to [app access checker](#).

| Name   | Username | Main phone | Business unit | Title |
|--|----------|------------|---------------|-------|
| <input checked="" type="checkbox"/> John William |          |            | demoappjetty  |       |

- Now, select the users whose roles are to be managed and click on the **MANAGE SECURITY ROLES** option. This will open a pop-up to select roles.
- To access AppJetty product entities, assign 'AppJetty Calendar 365' role to selected users.

**Manage security roles** ✕

John William

**Business unit:** \*  
demoappjetty

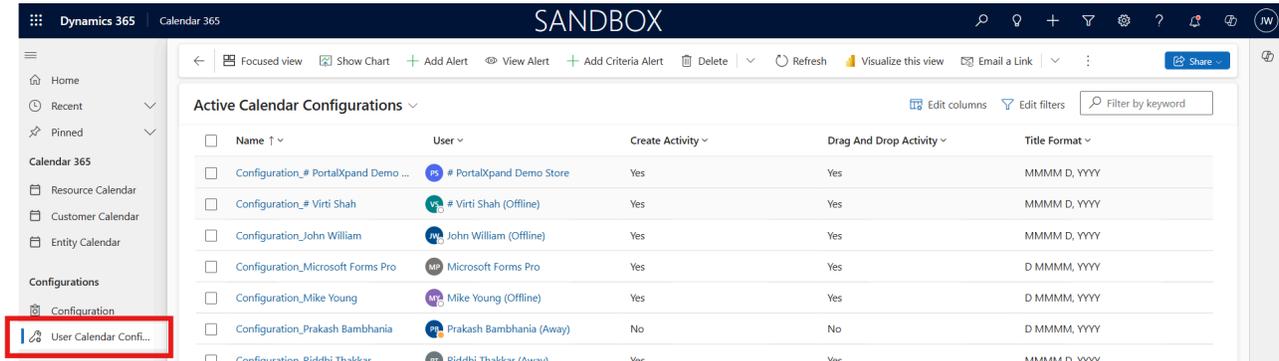
**Role** ↑

- Account Manager
- Activity Feeds
- AIB Roles
- AIB SML Roles
- Analytics Report Author
- App Deployment Orchestration Role
- AppJetty Calendar 365
- AppJetty Calendar 365 Administrator
- AppJetty Custom Auto Numbering

**Note:** System Administrator will also be able to access AppJetty Product Entities. When

## User wise Calendar 365 Configuration

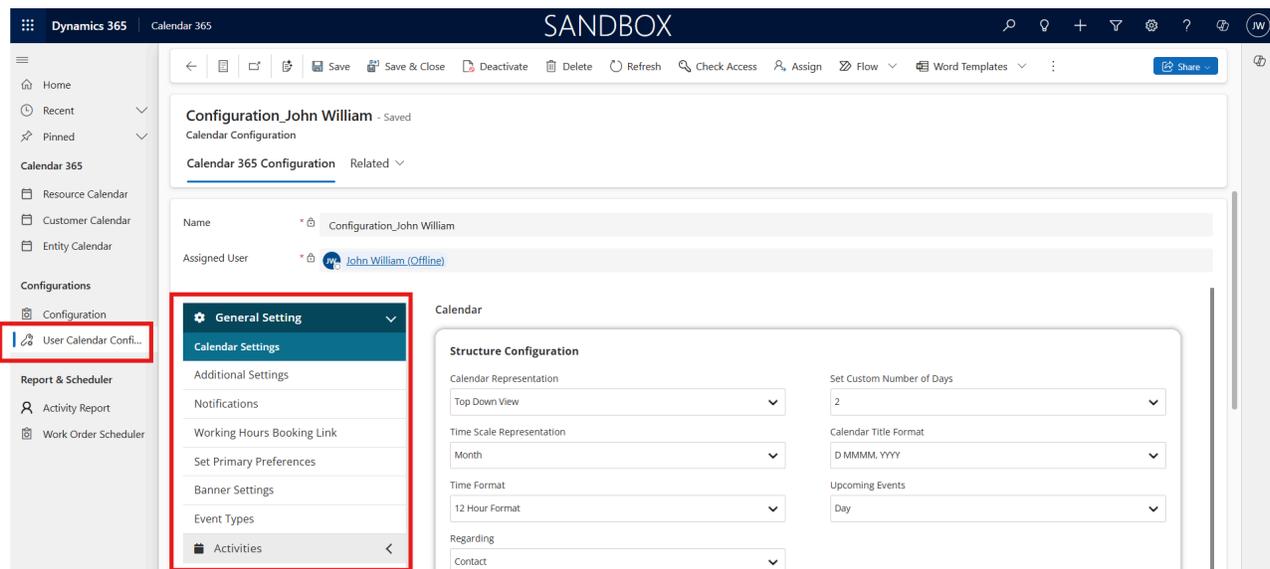
- When any role is assigned to the CRM users like AppJetty Calendar 365/AppJetty Calendar 365 Administrator or System Administrator role, you can configure the Calendar 365 users' role details and accessibility.
- To manage and configure the user-specific role, click on the **User Calendar Configuration** from the Calendar 365 navigation panel (left panel). It would show the list of all the users with Calendar 365 or System Administrator role.



| Name                                 | User                     | Create Activity | Drag And Drop Activity | Title Format |
|--------------------------------------|--------------------------|-----------------|------------------------|--------------|
| Configuration_# PortalXpand Demo ... | # PortalXpand Demo Store | Yes             | Yes                    | MMMM D, YYYY |
| Configuration_# Virti Shah           | # Virti Shah (Offline)   | Yes             | Yes                    | MMMM D, YYYY |
| Configuration_John William           | John William (Offline)   | Yes             | Yes                    | MMMM D, YYYY |
| Configuration_Microsoft Forms Pro    | Microsoft Forms Pro      | Yes             | Yes                    | D MMMM, YYYY |
| Configuration_Mike Young             | Mike Young (Offline)     | Yes             | Yes                    | D MMMM, YYYY |
| Configuration_Prakash Bambhania      | Prakash Bambhania (Away) | No              | No                     | D MMMM, YYYY |
| Configuration_Riddhi Thakkar         | Riddhi Thakkar (Away)    | Yes             | Yes                    | MMMM D, YYYY |

**Note:** These configurations are user-based configurations, and they will be set as default. When the specific users open the calendar, they will get the calendar view and activity-related details as it set from the User Calendar Configuration.

- By clicking on any user, you can configure the user's default calendar view and activity-related details.
- You will find the "Calendar 365 Configuration" from the details page of the user. You will find the **General Settings** and **Activities** configurations under the Calendar 365 Configuration.



**Configuration\_John William - Saved**  
Calendar Configuration

**Calendar 365 Configuration** Related

Name: Configuration\_John William  
Assigned User: John William (Offline)

**Calendar**

**Structure Configuration**

|                           |                |                           |              |
|---------------------------|----------------|---------------------------|--------------|
| Calendar Representation   | Top Down View  | Set Custom Number of Days | 2            |
| Time Scale Representation | Month          | Calendar Title Format     | D MMMM, YYYY |
| Time Format               | 12 Hour Format | Upcoming Events           | Day          |
| Regarding                 | Contact        |                           |              |

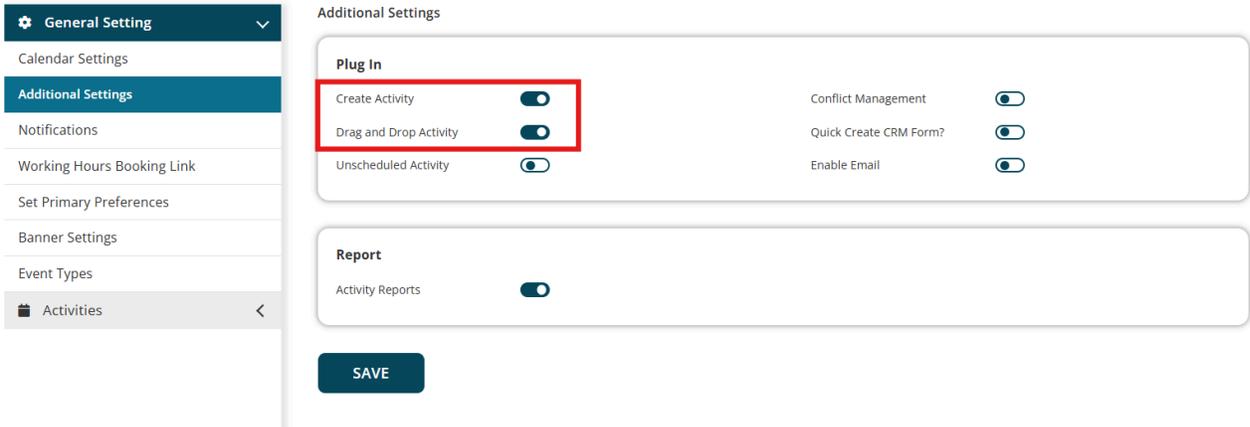
**General Setting** (highlighted in red box):

- Calendar Settings
- Additional Settings
- Notifications
- Working Hours Booking Link
- Set Primary Preferences
- Banner Settings
- Event Types
- Activities

- You can configure the **Calendar Settings**, **Additional Settings**, **Notifications**, **Working Hours Booking Link**, and **Set Primary Preferences** individually for the specific users. You can decide the functionalities and views that you allow the users to access.

- The **Calendar Settings**, **Additional Settings**, and **Notifications** are as same as the main Calendar Configuration. But some of the configurations are provided at the user level only and you can find those settings under the “Additional Settings”:

- **Create Activity:** Allow users to create an activity or not. By clicking on the switch, you can enable/disable this option.



**Additional Settings**

**Plug In**

- Create Activity
- Drag and Drop Activity
- Unscheduled Activity
- Conflict Management
- Quick Create CRM Form?
- Enable Email

**Report**

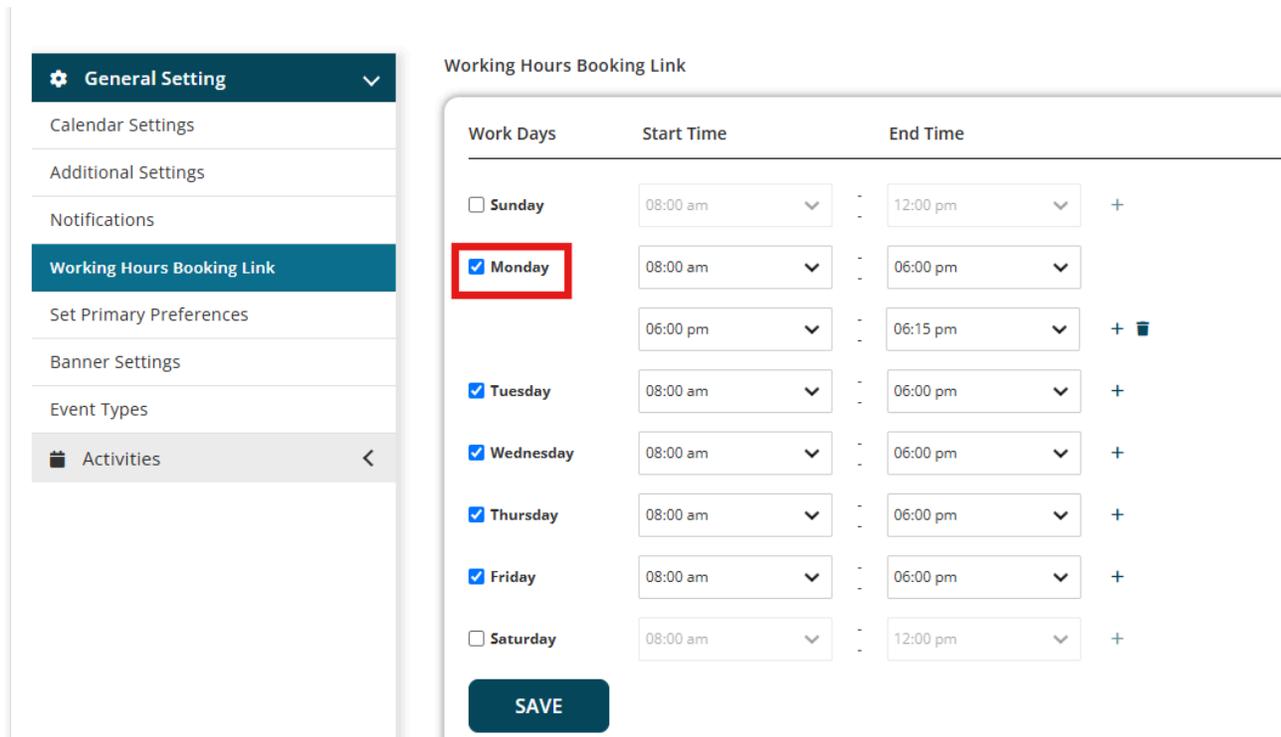
- Activity Reports

**SAVE**

- **Drag and Drop Activity:** You can drag and drop the activity to modify the details like scheduled date, change the user for the activity, etc. So, you will not require to open activity manually. By clicking on the switch, you can enable/disable this option.

**Note:** Only the admin users can drag and drop the activity. While normal CRM users can see the drag and drop option, but they will have no right to access them.

## Working Hours Booking Link



**Working Hours Booking Link**

| Work Days                                     | Start Time | End Time |
|---|------------|----------|
| <input type="checkbox"/> Sunday               | 08:00 am   | 12:00 pm |
| <input checked="" type="checkbox"/> Monday    | 08:00 am   | 06:00 pm |
|   | 06:00 pm   | 06:15 pm |
| <input checked="" type="checkbox"/> Tuesday   | 08:00 am   | 06:00 pm |
| <input checked="" type="checkbox"/> Wednesday | 08:00 am   | 06:00 pm |
| <input checked="" type="checkbox"/> Thursday  | 08:00 am   | 06:00 pm |
| <input checked="" type="checkbox"/> Friday    | 08:00 am   | 06:00 pm |
| <input type="checkbox"/> Saturday             | 08:00 am   | 12:00 pm |

**SAVE**

In this section, you can set the time slots of appointments for your customers on daily basis. Checkmark the day and insert the time slots as per requirement.

You can add the new time slot by clicking on the “+” icon.

- ⚙️ General Setting ▼
- Calendar Settings
- Additional Settings
- Notifications
- 📅 Working Hours Booking Link
- Set Primary Preferences
- Banner Settings
- Event Types
- 📅 Activities ◀

### Working Hours Booking Link

| Work Days                                     | Start Time |   | End Time |   |
|---|------------|---|----------|---|
| <input type="checkbox"/> Sunday               | 08:00 am   | - | 12:00 pm | + |
| <input checked="" type="checkbox"/> Monday    | 08:00 am   | - | 06:00 pm |   |
|   | 06:00 pm   | - | 06:15 pm | + |
| <input checked="" type="checkbox"/> Tuesday   | 08:00 am   | - | 06:00 pm | + |
| <input checked="" type="checkbox"/> Wednesday | 08:00 am   | - | 06:00 pm | + |
| <input checked="" type="checkbox"/> Thursday  | 08:00 am   | - | 06:00 pm | + |
| <input checked="" type="checkbox"/> Friday    | 08:00 am   | - | 06:00 pm | + |
| <input type="checkbox"/> Saturday             | 08:00 am   | - | 12:00 pm | + |

SAVE

You can also Delete the time slot by clicking on the “Delete” icon.

**Note:** Working Booking Link and Set Primary Preferences features will only available for Booking. For more contact Appjetty team

- General Setting** 
- Calendar Settings
- Additional Settings
- Notifications
- Working Hours Booking Link**
- Set Primary Preferences
- Banner Settings
- Event Types
- Activities** 

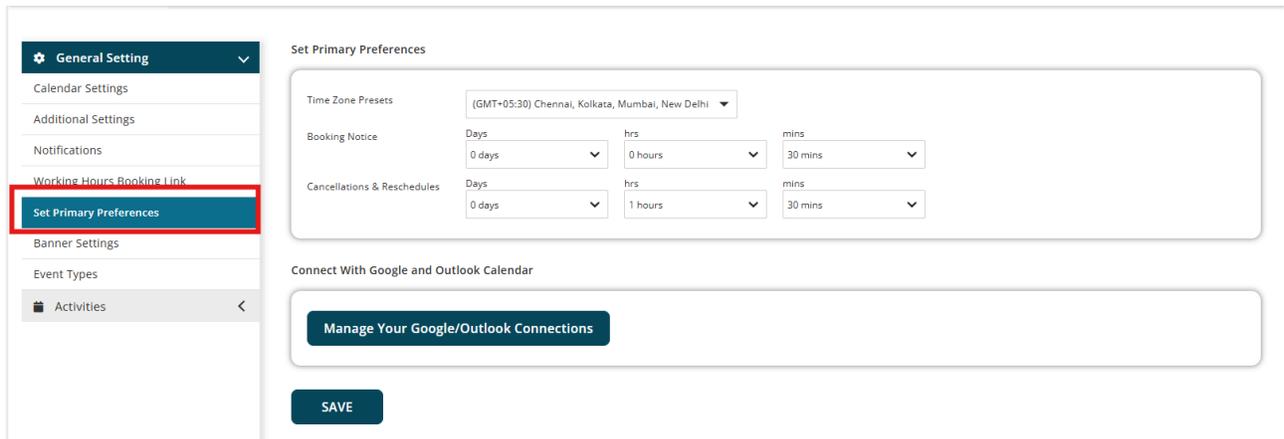
### Working Hours Booking Link

| Work Days                                     | Start Time  | End Time   |   |
|---|---|--|---|
| <input type="checkbox"/> Sunday               | 08:00 am  | 12:00 pm  | +   |
| <input checked="" type="checkbox"/> Monday    | 08:00 am  | 06:00 pm  |   |
|   | 06:00 pm  | 06:15 pm  | +  |
| <input checked="" type="checkbox"/> Tuesday   | 08:00 am  | 06:00 pm  | +   |
| <input checked="" type="checkbox"/> Wednesday | 08:00 am  | 06:00 pm  | +   |
| <input checked="" type="checkbox"/> Thursday  | 08:00 am  | 06:00 pm  | +   |
| <input checked="" type="checkbox"/> Friday    | 08:00 am  | 06:00 pm  | +   |
| <input type="checkbox"/> Saturday             | 08:00 am  | 12:00 pm  | +   |

**SAVE**

In the same way, you can configure the time slots for each day.

## Set Primary Preferences



**General Setting** (expanded)

- Calendar Settings
- Additional Settings
- Notifications
- Working Hours Booking Link
- Set Primary Preferences**
- Banner Settings
- Event Types
- Activities

**Set Primary Preferences**

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

Booking Notice: Days (0 days), hrs (0 hours), mins (30 mins)

Cancellations & Reschedules: Days (0 days), hrs (1 hours), mins (30 mins)

Connect With Google and Outlook Calendar

Manage Your Google/Outlook Connections

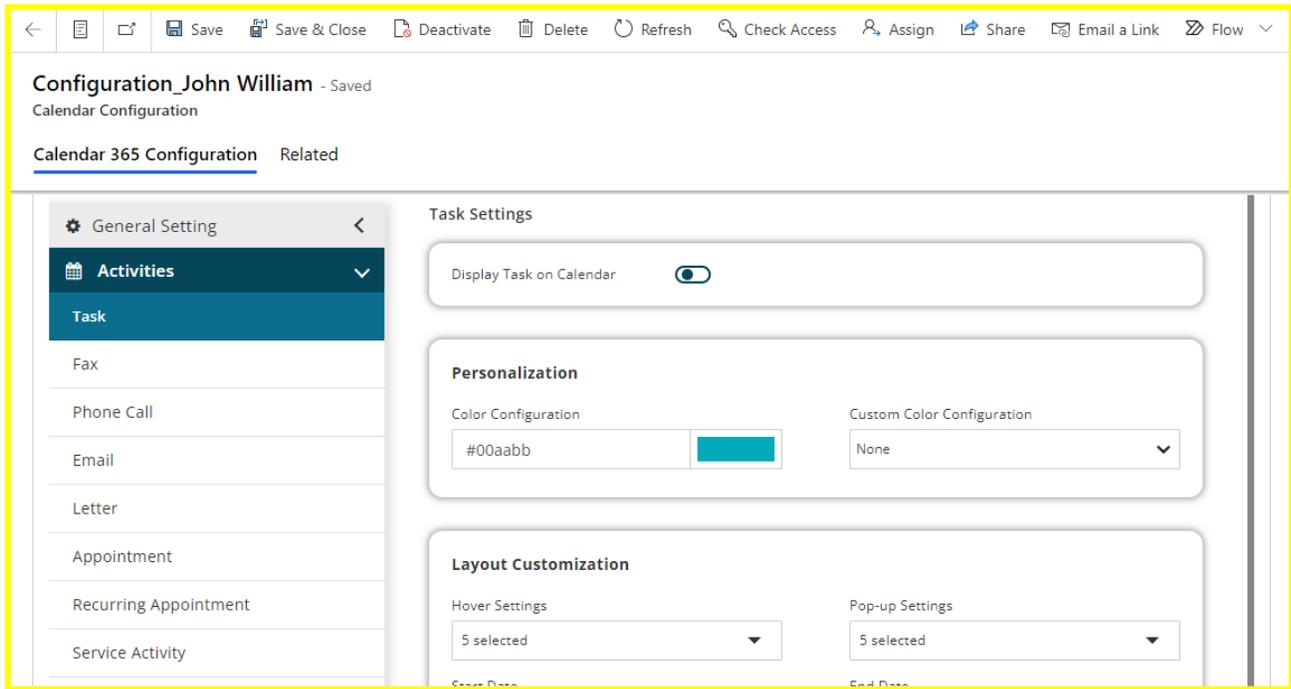
SAVE

**Time Zone Presets:** Set the time zone.

**Booking Notice:** Set the duration in which you want to remove the slots for appointments until that duration.

**Cancellation & Reschedules:** Set the duration before which you do not want to give the **Cancellation** and **Rescheduling** option.

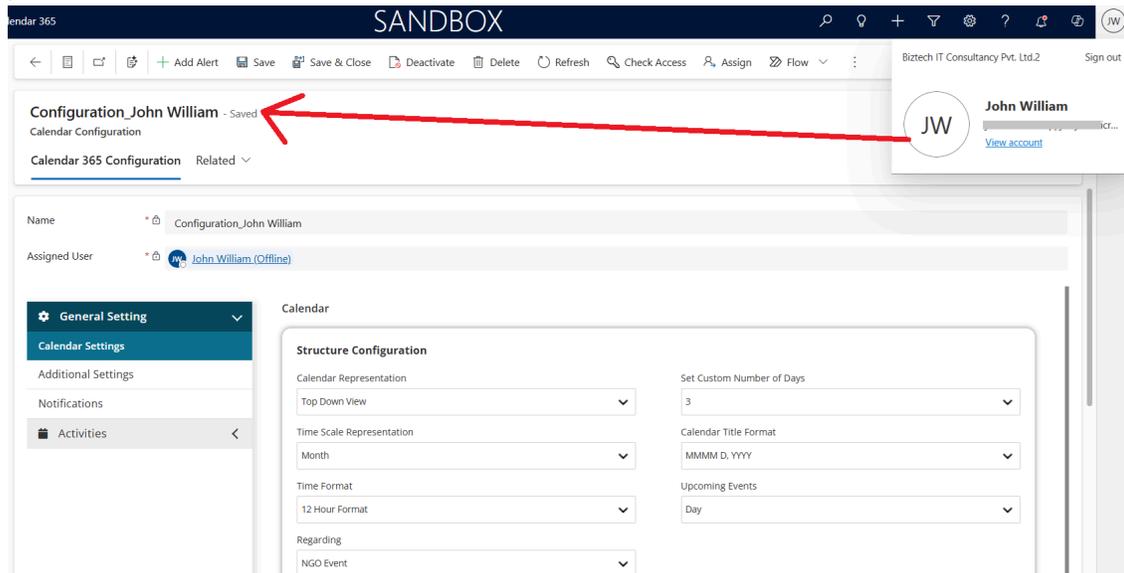
- The remaining setting is as same as the main calendar configuration. After configuring the user-wise calendar settings, click on the **Save** button to apply the changes for that specific user.
- You can also configure the activities at the user level. Here, activities related to all the configurations and settings will be as same as the main Calendar 365 configurations.



- After configuring the user-wise “Activities”, click on the **Save** button to apply the changes for that specific user.

**2 If “Enable User Configuration” is enabled**

- If this feature is enabled from the **Setup** then the calendar configuration of the logged-in user will be applied to the calendar.



- Also, you do not need to add the user manually once you enable this feature. After enabling “Enable User Configuration”, you will get the **Configuration All Users** button at the top. Once you click on this button, new users will be added without manual work.

**Note:** Only those users with the Calendar Appjetty normal or administrator role can be added.

### Active Calendar Configurations

| ✓ Name ↑  | User | Create Activity | Drag And Drop Activi |
|---|------|-----------------|----------------------|
| Configuration_# CCADDataAnalytic: # CCADDataAnalyticsML |      | Yes             | Yes                  |
| Configuration_# CDSUserManage: # CDSUserManagement      |      | Yes             | Yes                  |
| Configuration_# JobsServiceProd.: # JobsServiceProd     |      | Yes             | Yes                  |
| Configuration_# Omnichannel # Omnichannel               |      | Yes             | Yes                  |
| Configuration_# PpdfCDSCClient # PpdfCDSCClient         |      | Yes             | Yes                  |
| Configuration_# RelevanceSearch. # RelevanceSearch      |      | Yes             | Yes                  |

Calendar 365

← Show Chart **Configurat**

#### Active Calendar Configur

| ✓ Name ↑  | User | Create Activity | Drag And Drop Activity | Title Format |
|---|------|-----------------|------------------------|--------------|
| Configuration_# CCADDataAnalytic: # CCADDataAnalyticsML |      | Yes             | Yes                    | D MMMM, YYYY |
| Configuration_# CDSUserManage: # CDSUserManagement      |      | Yes             | Yes                    | D MMMM, YYYY |
| Configuration_# JobsServiceProd.: # JobsServiceProd     |      | Yes             | Yes                    | D MMMM, YYYY |
| Configuration_# Omnichannel # Omnichannel               |      | Yes             | Yes                    | D MMMM, YYYY |
| Configuration_# PpdfCDSCClient # PpdfCDSCClient         |      | Yes             | Yes                    | D MMMM, YYYY |
| Configuration_# RelevanceSearch. # RelevanceSearch      |      | Yes             | Yes                    | D MMMM, YYYY |

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Configuration process started successfully.Please refresh to view the records.

**OK**

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### Customization:

If you would like to customize or discuss about additional feature for **Calendar 365**, please write to [sales@appjetty.com](mailto:sales@appjetty.com)