User Guide
Marketing Calendar

Contents

1   Security Roles

Once Marketing Calendar is successfully installed on the Dynamics 365 environment, System Administrator should assign security roles to every user who needs to see or use Marketing Calendar.

Manage User Roles

What roles would you like to apply to the 1 User you have selected?

Role Name	Business Unit	
☐ Knowledge Manager		▲
☐ Marketing Calendar Admin		
☐ Marketing Calendar User		
☐ Marketing Manager		
☐ Marketing Professional		
☐ Sales Manager		▼

OK   Cancel
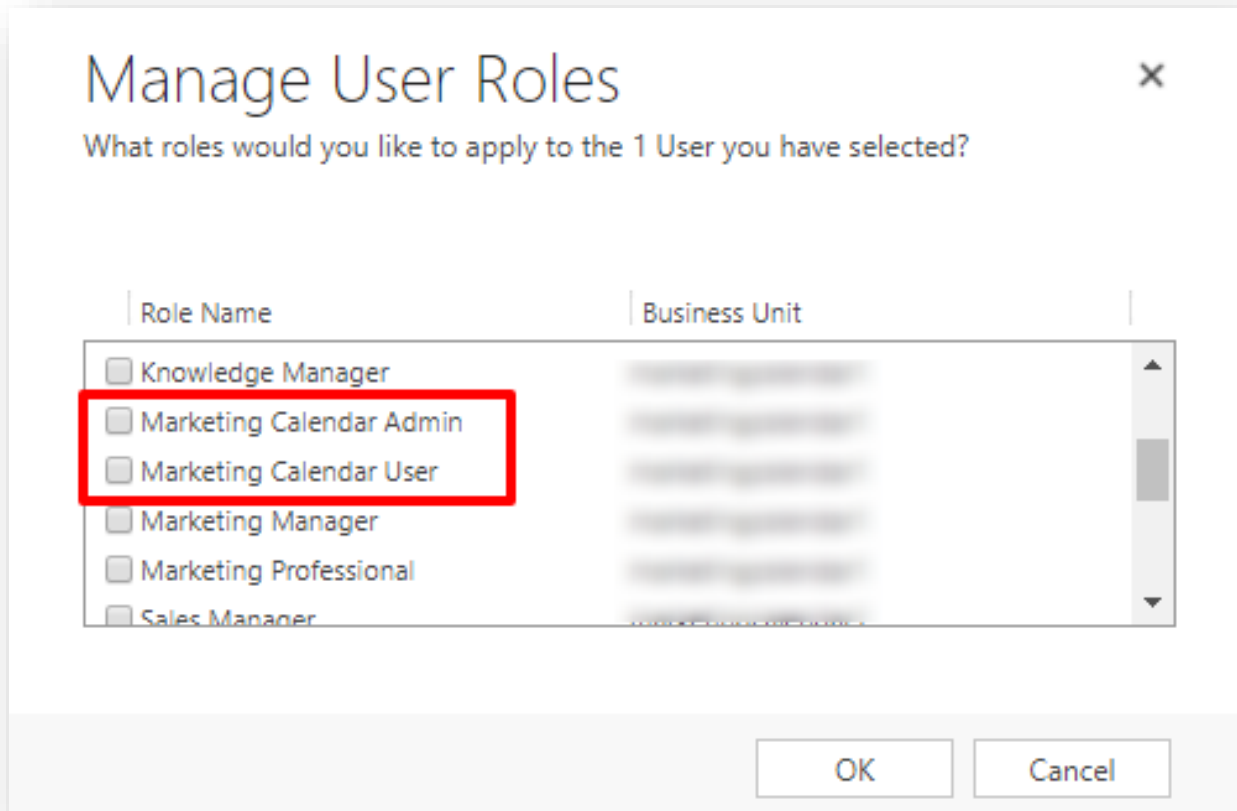
There are two different security roles:

1.1 Marketing Calendar Admin

This security role will give users full rights to configure Marketing Calendar.

1.2 Marketing Calendar User

This security role needs to be assigned to the user who will be using the marketing calendar.

User Types	Marketing Calendar User	Marketing Calendar Admin
Admin		✓
User / Sales Person	✓	

Note : Additional security roles are required to access basic functionality in D365. Kindly contact your System administrator for more help.

2 How to Use

Find Marketing Calendar Area under Dynamics 365 and click on Marketing Calendar.
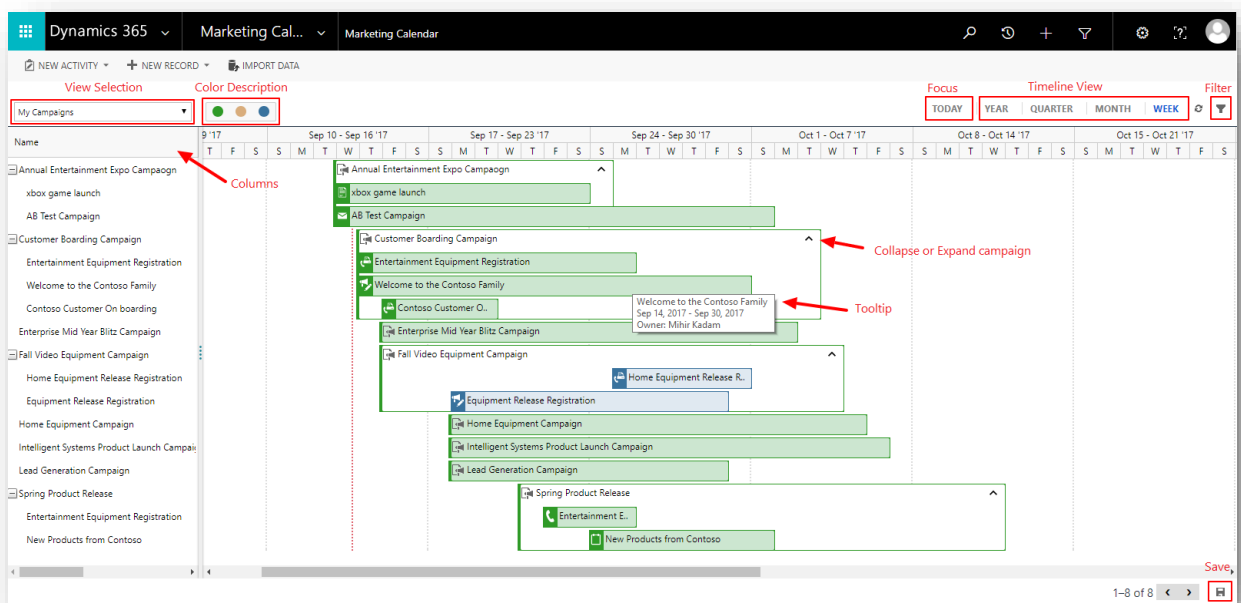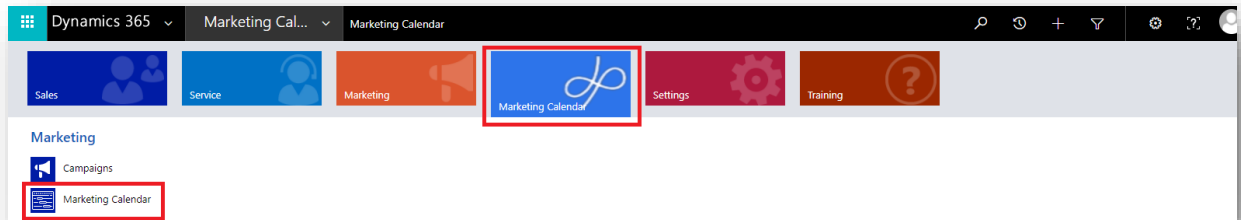
2.1 Campaigns and Campaign Activities in Calendar View

It allows the user to view present, past and future campaigns/campaign activities. It will display campaigns and campaign activities to the users based on security permissions.

There are two sections in the calendar view

Columns:
Columns will display additional information about records. Admin can configure these columns through solution configuration page.

Calendar:
It will display records to the users based on start and end date. If no data exist in the below fields, then the record will not be displayed to the user.

Entity: Campaign

Priority	Field
1	Actual Start/End
2	Proposed Start/End

Entity: Campaign Activity

Priority	Field
1	Actual Start/End
2	Scheduled Start/End

2.2 Timeline View (Year/Quarter/Month/Week)

This will allow the user to view data in different time span. Depending upon the user's selection, calendar data will change.

The default timeline view for Marketing Calendar is Week view.

2.3 Collapse and Expand Campaigns

The user can use collapse or expand functionality to view more/less data about specific campaign.

2.4 System and Personal Views

The user can select any view from view selection and data will be filtered accordingly.

2.5 Drag & Drop

To change the dates of any records user can just drag & drop or they resize the campaign/campaign activity window.

Do not forget to click on 🖫 button after you make any changes in the Marketing Calendar.

Note: If the user tries to update any record and do not have sufficient permission to update then the user will get an error message, and changes will revert to previous.
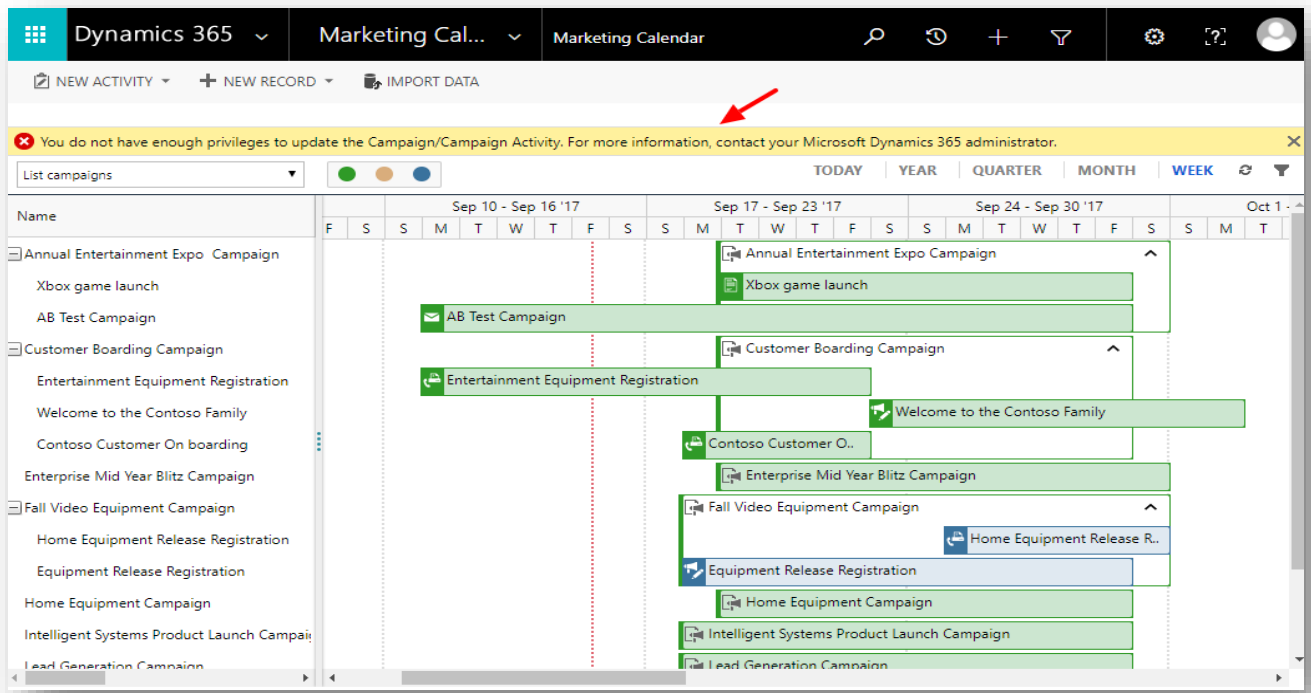
2.6 Color Coding

User can easily identify different campaigns and campaign activities based on color codes. Meaning of each color code given in the legend.

2.7 Open Entity Record

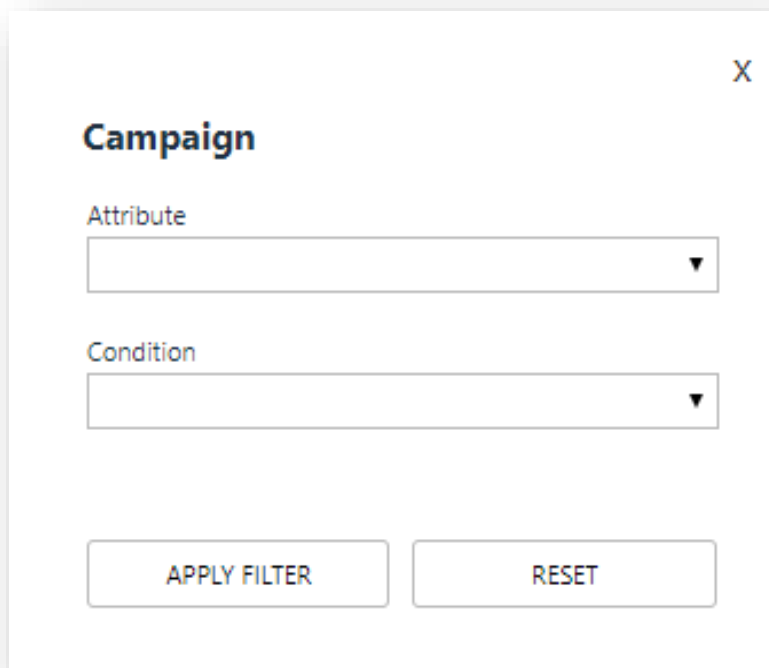Double click on any campaign or campaign activity to open CRM record.

2.8 Filter

Filter option will allow user to filter records based on specific condition.

Following are the data types supported by Marketing Calendar

Data Types
Single Line of text
Number
Picklist

Click on ▼ icon to view a popup. User can select any field and filter condition to filter campaign records. View will refresh after user click on "**APPLY FILTER**" button.
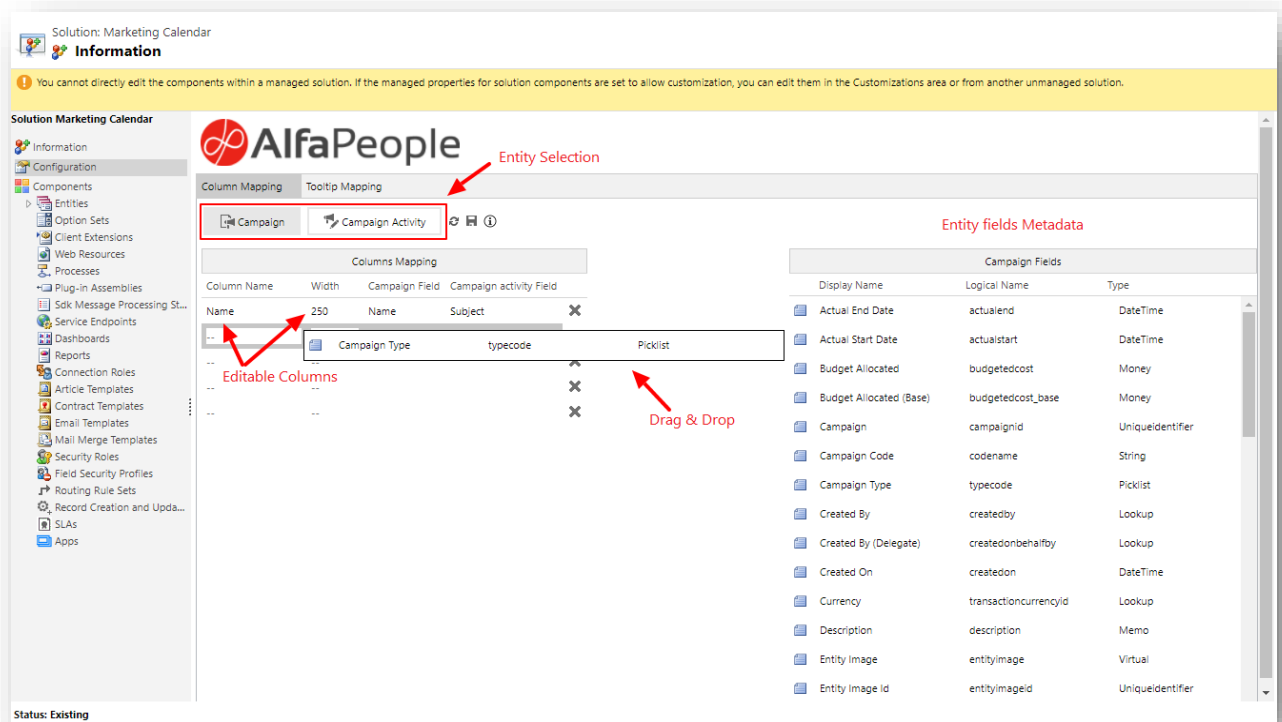
3 Configuring Marketing Calendar

User should have Marketing Calendar Admin role to configure below setup.

3.1 Column Mapping

This will allow user to configure columns to display in the Marketing Calendar. The user can configure up to 5 columns and reorder as per the requirement.

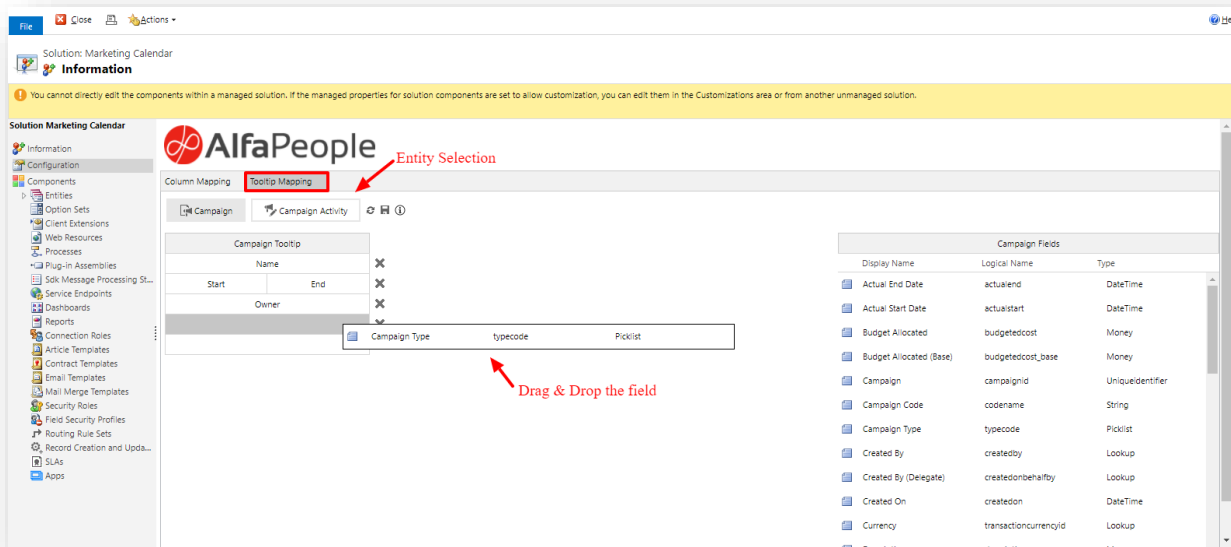**Note:** Name field is default and required by the system.

3.2 Tooltip Mapping

This will allow the user to configure tooltip for campaigns/campaign activities to display additional information about the record.

Note : Below are the fields required by system.

- Name
- Start
- End

4 Uninstalling Marketing Calendar

Uninstalling the solution from D365 does not affect Campaigns/Campaign activities. It will remove all components related to marketing calendar.