



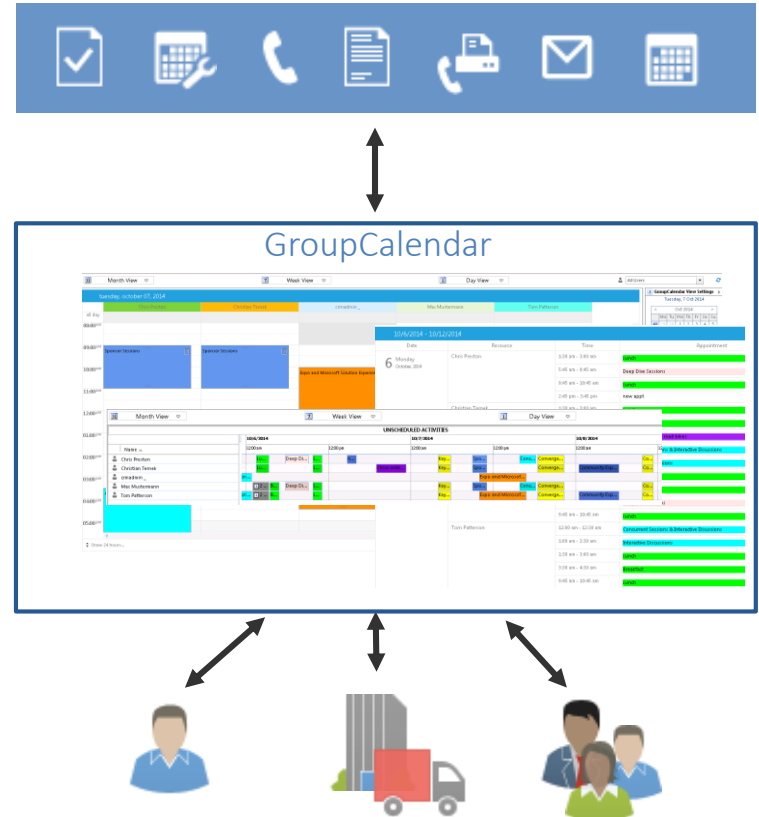
mscrm-addons.com
Your company for MS-CRM ADD-ONS!

GroupCalendar for Microsoft Dynamics CRM

GroupCalendar

Scheduling Tool for MS Dynamics CRM Users: Facilities - Teams - Resources

- Effective Team scheduling
 - Get an overview of your Team's schedule
 - See availabilities of users and resources
- Avoid conflicts
 - Highlighting of overlapping activities
- Scheduling made easy
 - Drag & Drop rescheduling
 - See working hours
 - Color coding/highlighting
 - Assigning unscheduled activities and appointments
 - Print calendar
 - ...



Layout & Navigation

View-Selection vs User-Selection

The screenshot displays the mscrm-addons.com calendar interface. The main calendar area shows a week view from Monday, 6th to Friday, 10th. The time slots range from 08:00 am to 02:00 pm. Activities are displayed as colored blocks: 'Deep Dive Sessions' (orange) on Monday, 'Lunch' (green) on Monday, 'Sponsor Sessions' (blue) on Tuesday, and 'Convergence Experience' (yellow) on Wednesday. A context menu is open over the calendar, listing view options: List, TopDown, Gantt, Timeline, and Agenda. The 'View-Selection' panel is highlighted in purple, and the 'User-Selection' panel is highlighted in grey. The 'Calendar -settings' panel is highlighted in pink. The 'Calendar -settings' panel includes a 'GroupCalendar View Settings' section, a 'Today' button, an 'Extended Select' section with 'Select Users/Resources' and 'Settings' options, a 'Users' section with 'All Users' and 'Which activities should be shown' options, and a 'New Activity' section with a list of activity types: Task, Fax, Phone Call, Email, Letter, Appointment, and Service Activity. The 'Task' and 'Appointment' checkboxes are checked.

View-Selection

Calendar

Week View

Day View

User-Selection

Calendar -settings

GroupCalendar View Settings

Mo Tu We Th Fr Sa Su

40 29 30 1 2 3 4 5

41 6 7 8 9 10 11 12

42 13 14 15 16 17 18 19

43 20 21 22 23 24 25 26

44 27 28 29 30 31 1 2

45 3 4 5 6 7 8 9

Today

Extended Select:

Select Users/Resources

Settings

Users:

All Users

Which activities should be shown:

New Activity

Task

Fax

Phone Call

Email

Letter

Appointment

Service Activity

Defining teams & resource groups

Define the teams, user-groups and/or resources you want to schedule

1) Advanced Find

Each user can create his own Advanced Find's that deliver the user-group's he needs to see.
E.g.: „West-Coast salespeople“

2) Teams

CRM entity that allows to define teams consisting of various CRM users.
E.g. Sales-Teams, Dev-Team, Accounting,...

3) Resource Groups

CRM entity that allows to define resource groups consisting of both users and facilities/equipment. E.g. All Cars and Service-users

4) Single Users

Display calendar of a certain user

5) Single Facilities or Equipment

Show calendar for a certain facility or equipment

All Users	1	
All Users All Call Center Standard	2	
All Cars All Cars & Rooms All laptops All Laptops and Beamer All Meeting Rooms	3	
Chris Preston Christian Ternek crmadmin_ Max Mustermann Michael Dohr Tom Patterson	4	
Beamer Car 1 Car 2 Car 3 Laptop 1 Laptop 2 Laptop 3 Laptop 4 Meeting Room 101 Meeting Room 102 Meeting Room 103	5	

Features

To simplify scheduling, GroupCalendar has been extended with features

- 1) Drag & Drop
Simply drag & drop activities to different users or change date/time of a certain activity
- 2) Planning unscheduled activities (e.g. service-appointments)
Schedule and assign appointments via Drag & Drop in Gantt view.
The list of „Activities to schedule“ can be global or personalized by each user.
- 3) Working-hour integration
The calendar can be enabled to show the working-hours and time off defined for CRM-users. This allows to see available slots in your users calendar easily.
- 4) Color-Coding
To keep a compact overview, color-coding can be enabled on any CRM-activity (appointments, tasks,..). The colors are supported by all views and thus consist when navigating through your calendar.
- 5) Print options and customizable settings for each user

The Views

GANTT

31 Month View 7 Week View 1 Day View All Users

Service Activities **Appointments**

Subject	Scheduled Start	Scheduled End	All Day Eve...	Owner	Created
100 bikes assembly for Discount Bicycle Speci...	9/29/20 10:00 pm	9/30/20 10:00 pm	True	Michael Dohr	Michae
Basic tune-up and lubrication	10/28/20 6:00 pm	10/28/20 8:30 pm	False	Michael Dohr	Michae
Basic tune-up and lubrication	10/14/20 1:00 pm	10/14/20 3:30 pm	False	Michael Dohr	Michae
Basic tune-up and lubrication	10/24/20 1:00 pm	10/24/20 4:30 pm	False	Michael Dohr	Michae
Basic tune-up and lubrication	9/30/20 3:30 pm	9/30/20 5:30 pm	False	Michael Dohr	Michae

UNSCHEDULED ACTIVITIES

10/6/ 12:00 am 12:00 pm 10/7/ 12:00 am

Name

- Chris Preston
- Christian Ternek
- crmadmin_
- Max Mustermann
- Tom Patterson

10/6/ 7:00 PM

Drag me to schedule

GroupCalendar View Settings

Tuesday, 7 Oct

Oct

Mo Tu We Th Fr Sa Su

40 29 30 1 2 3 4 5

41 6 7 8 9 10 11 12

42 13 14 15 16 17 18 19

43 20 21 22 23 24 25 26

44 27 28 29 30 31 1 2

45 3 4 5 6 7 8 9

Today

- Date Range +

Extended Select:

Select Users/Resources

Settings

Users:

All Users

Which activities should be shown:

New Activity

☒ Task ☒

☒ Fax ☐

☒ Phone Call ☐

☒ Email ☐

☒ Letter ☐

☒ Appointment ☒

☒ Service Activity ☒

Options:

Only attendees: ☐

The Views

Top-Down (daily or weekly)

The screenshot displays the Microsoft Dynamics CRM GroupCalendar interface in a Top-Down view for Wednesday, May 1st. The interface is divided into several sections:

- Navigation Bar:** Located at the top, it includes tabs for "Month View", "Week View", and "Day View".
- Calendar Header:** Displays the date "wednesday, may 1," and lists the users whose calendars are visible: "Administrator Administrator", "Chris Preston", "christian Ternek", "Jin Yan", and "Max Mustermann".
- Calendar Grid:** The main area shows a grid of activities for the day. Activities include:
 - "Meeting with dev-team" (all day) for Administrator Administrator and christian Ternek.
 - "Test" (09:00 am - 12:00 pm) for Chris Preston, Location: LACC 411.
 - "SC01 High Performance" (10:00 am - 12:00 pm) for Jin Yan, Location: LACC 1508.
 - "SM803 Selling Window" (10:00 am - 12:00 pm) for Jin Yan, Location: LACC 403A.
 - "WEB05 Improve Business Performance with R" (10:00 am - 12:00 pm) for Max Mustermann, Location: JW Gold Ballroom, Salon 4.
 - "DYN20 Microsoft Dynamics CRM Online - Res" (11:00 am - 12:00 pm) for christian Ternek, Location: LACC 408A.
- Right Sidebar (GroupCalendar View Settings):** Contains settings for the current view, including a calendar for "Wednesday, 1 May", "Extended Select" options, "Users" (All), and "Which activities should be shown" (New Activity).
- Bottom Toolbar:** Offers options to create new activities: "NEW APPOINTMENT", "NEW TASK", "NEW PHONE CALL", "NEW LETTER", "NEW EMAIL", "NEW FAX", and "NEW SERVICE ACTIVITY".

The Views

Agenda (List view)

31 Month View Week View Day View All Users

10/6 - 10/12

Date	Resource	Time	Appointment
6 Monday October, 2014	Chris Preston	1:30 am - 3:00 am	Lunch
		5:45 am - 8:45 am	Deep Dive Sessions
		9:45 am - 10:45 am	Lunch
		2:45 pm - 3:45 pm	new appt
	Christian Ternek	1:30 am - 3:00 am	Lunch
		9:45 am - 10:45 am	Lunch
		7:00 pm - 11:00 pm	Close order for 25 road bikes
	crmadmin_	12:00 am - 12:30 am	Concurrent Sessions & Interactive Disussions
	Max Mustermann	1:00 am - 2:30 am	Interactive Discussions
		1:30 am - 3:00 am	Lunch
		3:30 am - 4:30 am	Breakfast
		5:45 am - 8:45 am	Deep Dive Sessions
	Tom Patterson	9:45 am - 10:45 am	Lunch
		12:00 am - 12:30 am	Concurrent Sessions & Interactive Disussions
		1:00 am - 2:30 am	Interactive Discussions
		1:30 am - 3:00 am	Lunch
		3:30 am - 4:30 am	Breakfast

GroupCalendar View Settings

Tuesday, 7 Oct

Oct

Mo	Tu	We	Th	Fr	Sa	Su
40	29	30	1	2	3	4
41	6	7	8	9	10	11
42	13	14	15	16	17	18
43	20	21	22	23	24	25
44	27	28	29	30	31	1
45	3	4	5	6	7	8

Today

Extended Select:

Select Users/Resources

Settings

Users:

All Users

Which activities should be shown:

New Activity

☒ Task ☒

☒ Fax ☐

☒ Phone Call ☐

☒ Email ☐

☒ Letter ☐

☒ Appointment ☒

☒ Service Activity ☒

Options:

Only attendees: ☐

Only open: ☐

The Views

TimeLine

Month View

Week View

Day View

All

	Monday, April 29	Tuesday, April 30	Wednesday, May 1	Thursday, May 2	Friday, May 3	Saturday, May 4	Sunday, May 5
Chris Preston	06:30am - 04:00pm SMBVK How We Win in SMB Location: JW Platinum Ballroom Required:	07:30am - 01:30pm DYNVKR Be Dynamic: Opportunit Location: LACC Concourse Hall 15 Required:	08:30am - 12:00pm Test Location: LACC 411 Required:		08:15am - 02:15pm TEL08 Microsoft Lync Voice Oppor Location: LACC 1508 Required:		
christian Ternek	08:20am - 08:20pm BL01 How to Prepare Now for the Location: JW Diamond Ballroom, S Required:	10:50am - 02:50pm WP06 Windows Phone in the Ente Location: JW Gold Ballroom, Salon Required:	12:00am - 12:00am Meeting with dev-team Required: Christian Ternek		10:30am - 06:00pm BL12 Making the Most of MPN for Location: LACC 153AB Required:		
			10:45am - 05:15pm DYN20 Microsoft Dynamics CRM C Location: LACC 408A Required:				
Jin Yan	07:15am - 03:30pm TEL02 Moving Productivity Applica Location: LACC 511BC Required:	04:15am - 01:30pm WIN13i Windows Licensing and Bu Location: LACC 402B INT Required:	09:00am - 02:30pm SC01 High Performance Computin Location: LACC 1508 Required:	06:45am - 01:45pm WEBVK Get Inspired with the Micro Location: JW Gold Ballroom, Salon Required:	05:00am - 11:00am TEL05 Moving Information Worker Location: LACC518 Required:		
			09:45am - 03:45pm SM803 Selling Windows to SMB: V Location: LACC 403A Required:	05:30pm - 10:30pm BL07 Letting Go to Grow: Building Location: JW Platinum Ballroom Required:	05:30pm - 01:30am WP10i Enterprise Mobility: When to Target Windows Embedded Hand Location: JW Atrium 1 INT Required:		
Max Mustermann	09:30am - 01:30pm WP02 The Five Things You Need to Location: JW Gold Ballroom, Salon Required:	05:30am - 12:00pm SMB11i Winning SMB Customers Location: LACC 405 Required:	08:00am - 03:30pm WEB05 Improve Business Performa Location: JW Gold Ballroom, Salon Required:		07:00am - 02:45pm WEB06 Don't Build it from Scratch Location: JW Atrium 3 Required:	10:30am - 04:30pm SMB09 Capture the SMB Desktop Location: LACC 403A Required:	
	01:40pm - 08:25pm WINVK Enabling Today's Flexible V					02:00pm - 07:00pm WIN03 Deploying Windows 7 in th	

GroupCalendar View Settings

Monday, 29 Apr

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

Extended Select:

Select Users/Resources

Settings

Users:

All

Which activities should be shown:

New Activity

☒ Task

☒

☒

☐ Fax

☐

☐ Phone Call

☐

☐ Email

☐

☐ Letter

☐

☐ Appointment

☒

☒ Service Activity

☒

Options:

Only attendees:

☐

Only open:

☐

TopDown activities only

☐

The Views

Month-Overview

Month View Week View Day View All Users

Month Overview (October)

Mon	Tue	Wed	Thu	Fri	Sat	Sun
29 04:15am appt 1	30 dcp demo 03:00am service act 2	01 Oct 04:45am Service act 1	2	3	4 service act ALL-DAY 5	5 07:00am Breakfast 09:30am Expo and 12:00pm Lunch 04:15pm Opening more...
6 08:30pm Concurrent 01:00am Interactive 01:30am Lunch 03:30am Breakfast more...	7 04:00am Keynote 09:00am Sponsor 10:00am Expo and 03:56pm Concurrent more...	8 12:30am Community 09:45am Convergence 04:00pm Community 06:15pm Adjustment	9	10 02:45pm Appointment	11	12
13	14	15	16	17	18	19
20	21 Adjust brakes and	22	23	24	25	26

GroupCalendar View Settings

Tuesday, 7 Oct

Oct

<	Mo	Tu	We	Th	Fr	Sa	Su	>
40	29	30	1	2	3	4	5	
41	6	7	8	9	10	11	12	
42	13	14	15	16	17	18	19	
43	20	21	22	23	24	25	26	
44	27	28	29	30	31	1	2	
45	3	4	5	6	7	8	9	

Today

Extended Select:

- Select Users/Resources
- Settings

Users:

All Users

Which activities should be shown:

New Activity

- ☒ Task
- ☒ Fax
- ☐ Phone Call
- ☐ Email
- ☐ Letter
- ☐ Appointment
- ☒ Service Activity

Options:

- Only attendees: ☐
- Only open: ☐

Retail – Pricing

Perpetual License & Subscription

Perpetual license

Component	Price / license	Support & Maintenance*
Per Site license (must cover all active users)	\$ 70	\$ 17
Per User license (minimum of 10 User)	\$ 140	\$ 34

* Support & Maintenance is included for the first year

Subscription

Component	Price / license and month	Support & Maintenance
Per Site (must cover all active users)	\$ 7	included
Annual subscription (minimum of 10 Users)	\$ 14	included

Contact us

Support & Contact

- You can find us on the web at <http://www.mscrm-addons.com>
- Help-Center (Live-Chat, Support): <http://www.mscrm-addons.com/Support.aspx>
- Do not forget we have an awesome blog at <http://blogs.mscrm-addons.com>!



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