



Dynamics 365 / CRM / XRM Platform



User Guide



CRM Versions Supported: 2013/2015/2016/D 365

Activity Calendar for Dynamics 365 / CRM is a very useful add-on that allows CRM users across the organization to view their individual activities as well as others to effectively coordinate, cooperate and collaborate for the faster completion of tasks at hand. Any CRM user can navigate to a particular record entity and click on **Activity Calendar** to see the list of activities attached to it. Users can in turn drag and drop the activities between dates and timings for easy rescheduling.

Activity Calendar is intended for implementation by solution professionals.

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Product Overview

Activity Calendar is a Dynamics 365 / CRM 2013 or CRM 2015 an add-on enhancement that allows organizations to be more joint effort interactive participation by allowing users to view Activities in the CRM calendar of multiple users within their organization.

The key features of Activity Calendar are:

- CRM users to view Activity calendar
- All activities like phone, appointment, task etc. are available to view in calendar
- Displays activities for one or more users
- Relationship between Account & Activity
- Relationship either on 1:N relation or N:1 relation
- Simple overview to control conflicts
- One simple Calendar for one and all
- View calendar as per your choice – day, week, month, year
- User specific rights assigned for every user
- Filter the results as you're your need
- Acts as Office admin tool for the executives
- Drag and Drop facility to move activities across dates

License Key

- To install Activity Calendar you will require License key, which you can get by sending an email requesting license key to salesteam@mtccrm.com with your **Organization Unique name**.
- To access your Organization Unique name click on settings→Customizations→Developer Resources as shown below figure.

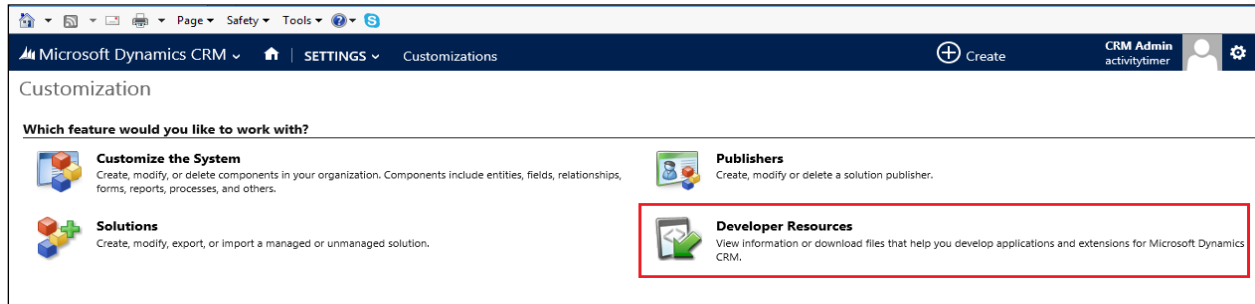


Figure 1: Developer Resources

- A window will pop up with Organization Unique Name as shown.

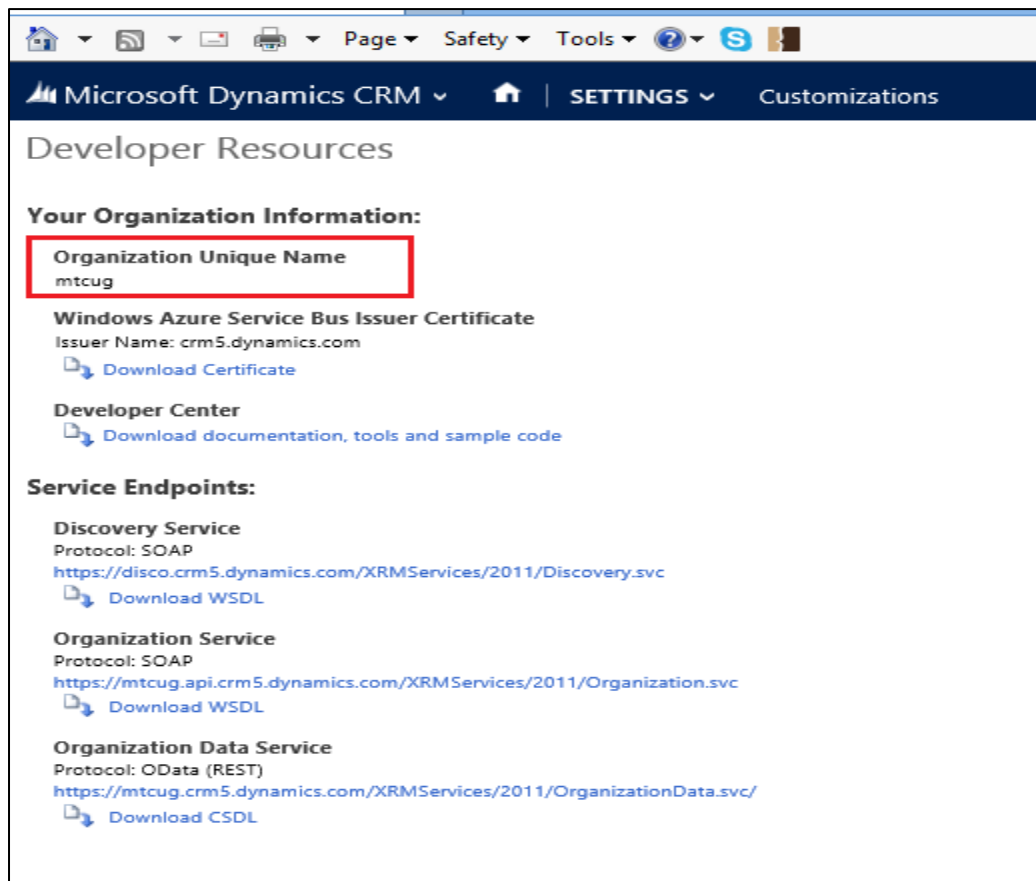


Figure 2 : Organization Unique Name

NOTE: After placing the license key request you will receive the LICENSE KEY within 24 hrs.

Installation Process

To install the Activity Calendar the following steps has to be followed

STEP 1:

- Go to <http://www.dynamicsexchange.com/AC.aspx> click on Download to get Solution.

STEP 2:

- On Downloading you will get ActivityCalendar_2_0_0_2.zip (ZIP file).
- Extract the files from the downloaded folder. You will get two WINRAR ZIP files.



ActivityCalendar_20152016.042016.3.0_managed.zip



Licensing_20152016.042016.3.0_managed.zip

NOTE: To install the **Activity Calendar, Solution** need to be imported into CRM

STEP 3:

- Open your CRM click on **Settings→Solution→Import** it will open import Solution window.

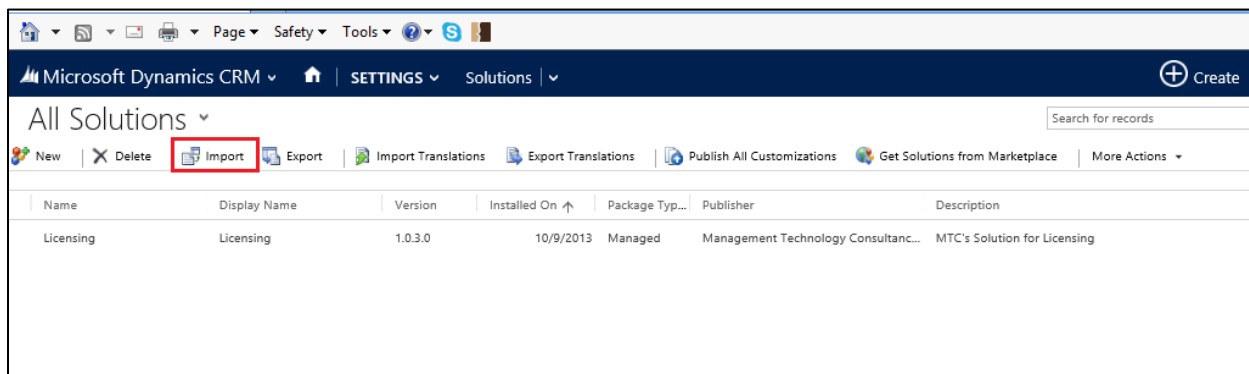


Figure 3: Import Solution

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.

Installing Licensing Solution

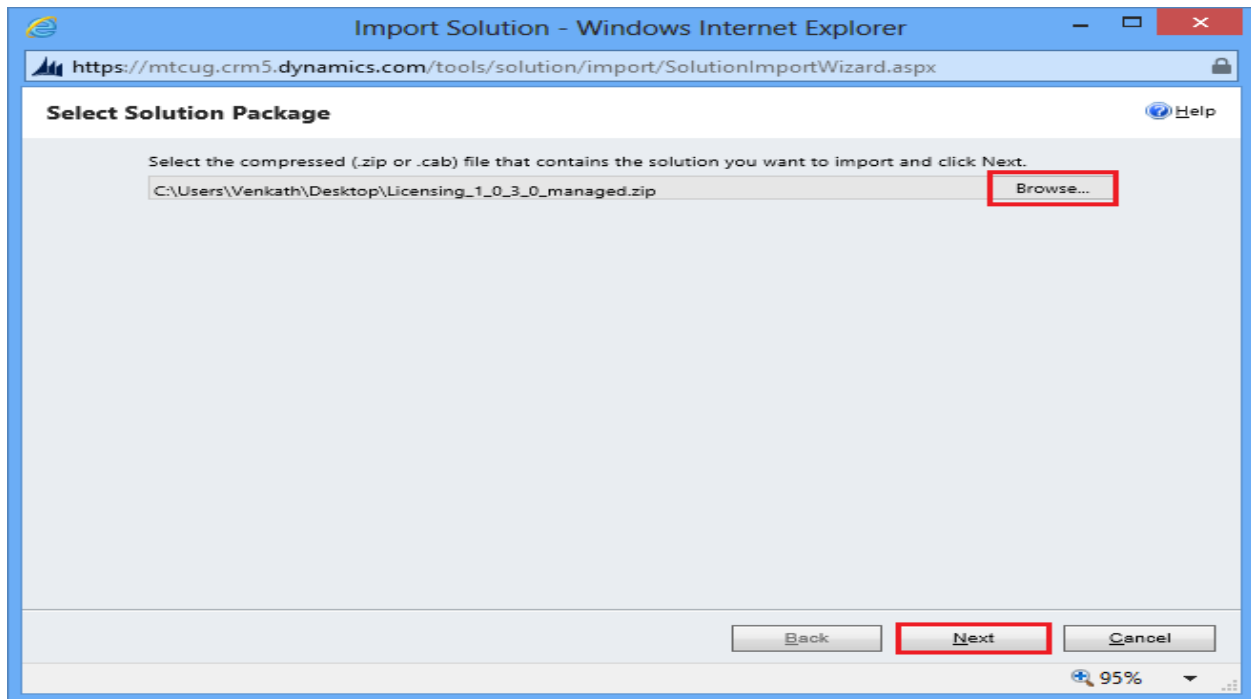


Figure 4 : Select Solution Package

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.

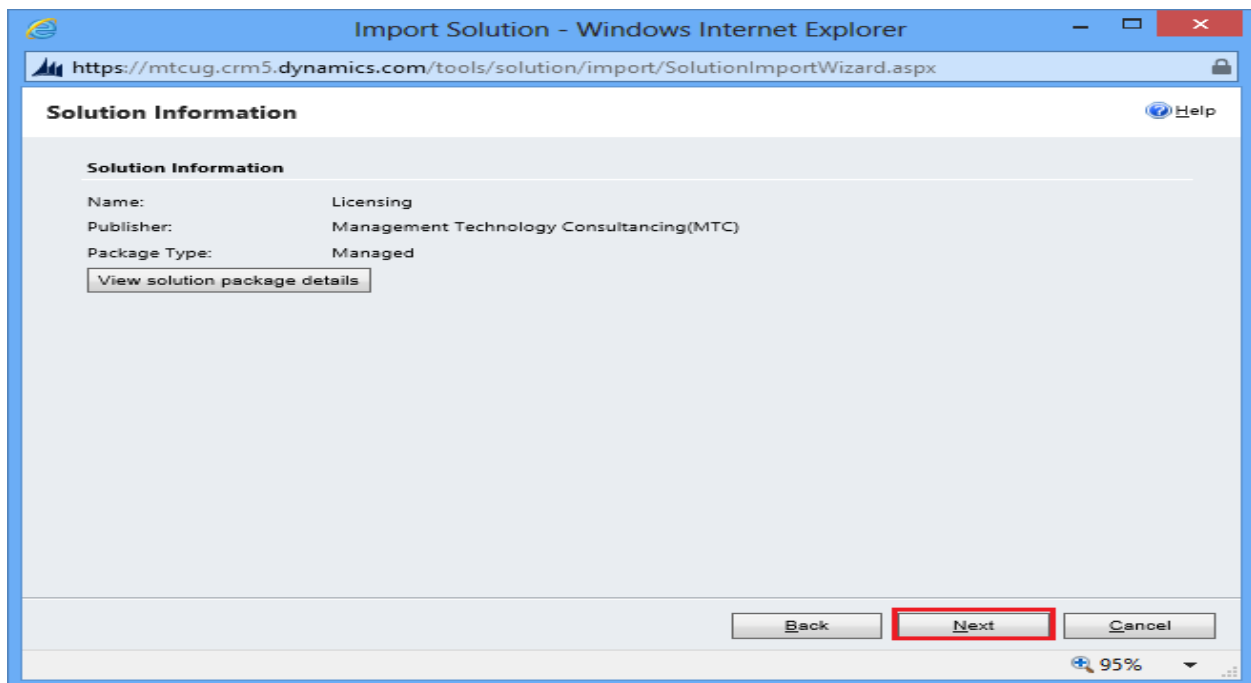


Figure 5: Importing Options window

- Click on Next to proceed

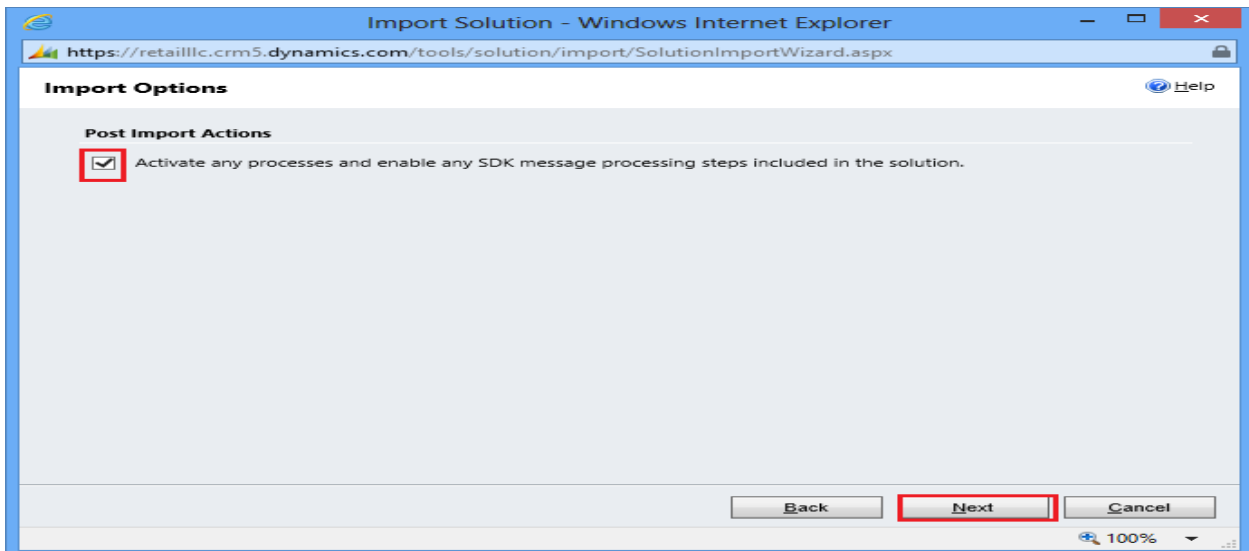


Figure 6: Import Option

- Click on Next to proceed

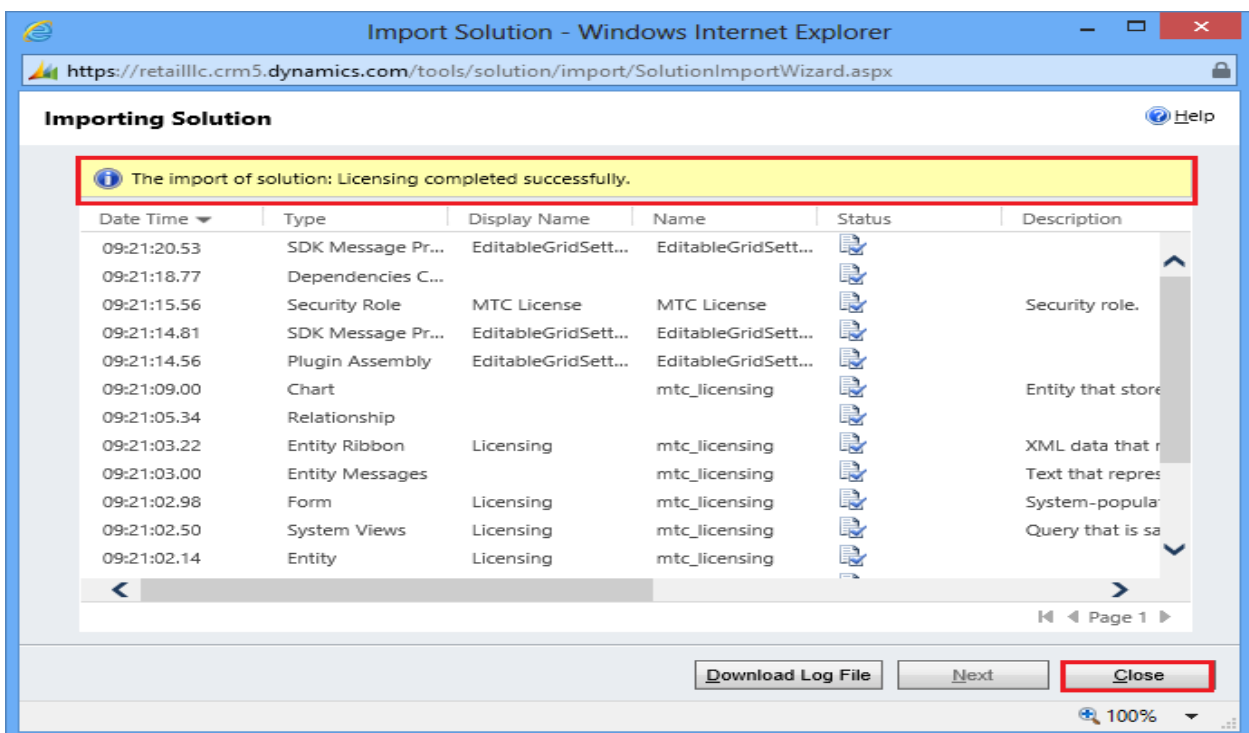


Figure 7: Importing Solution – Licensing

- Click on Close after successful completion message is displayed.

Installing Activity Calendar Solution

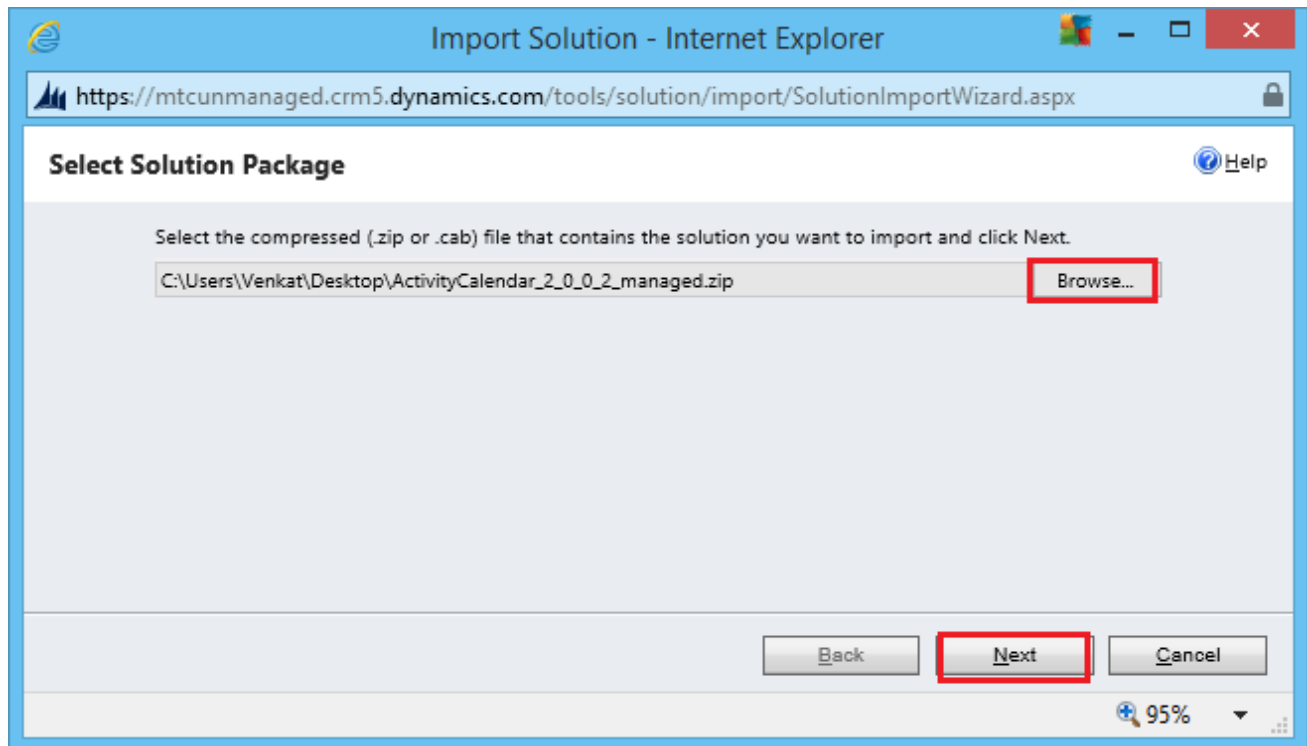


Figure 8: Import Solution

- Solution information window will open. It gives the solution package details and general information. Click on Next to continue.

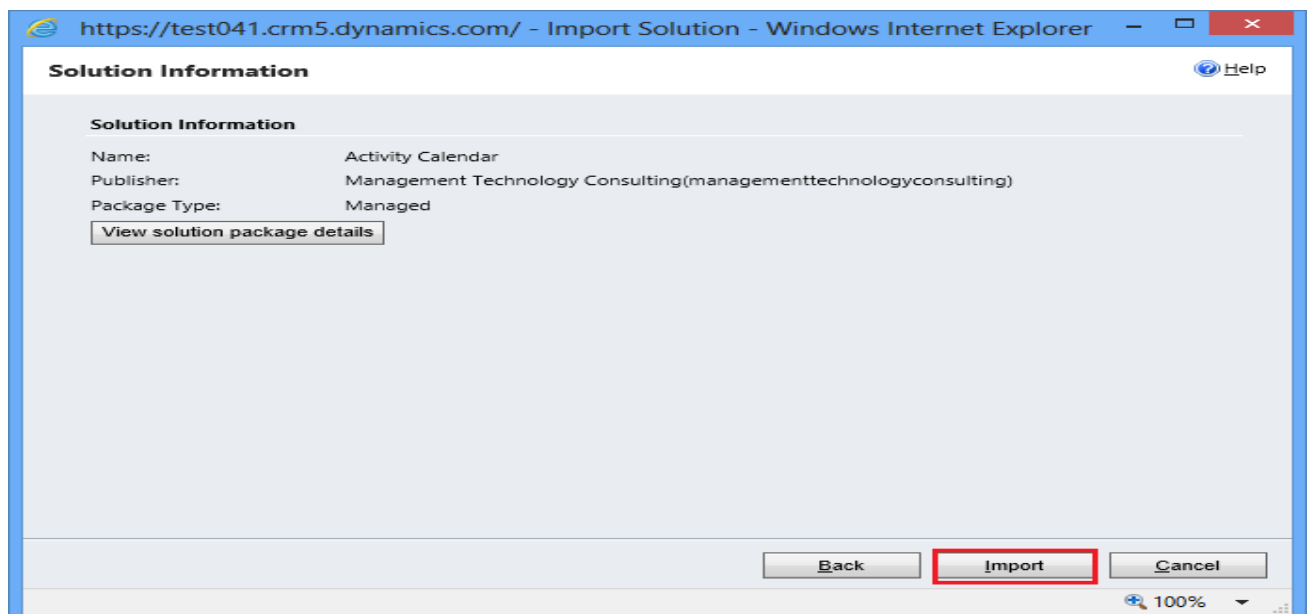


Figure 9: Solution Information

- Click on next it will open importing solution window in that dialog will be opened displaying the message importing the customization please wait for the operation to complete.

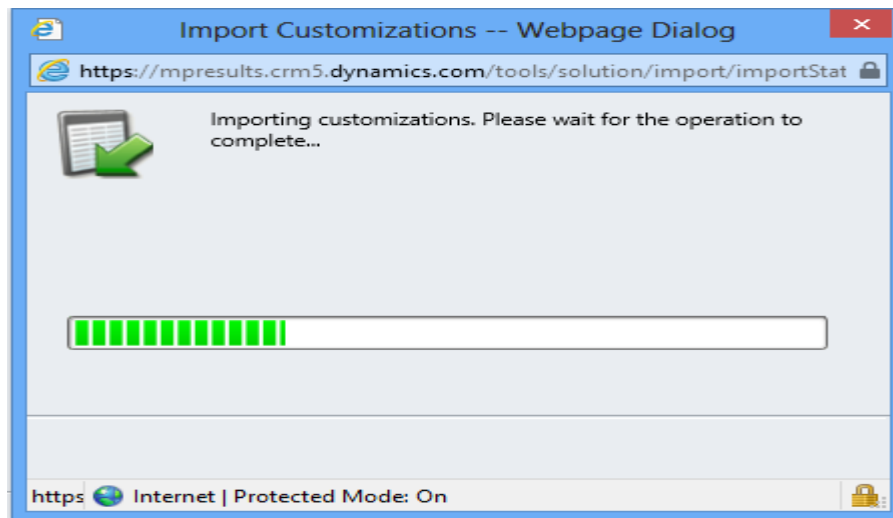


Figure 10: Importing customization

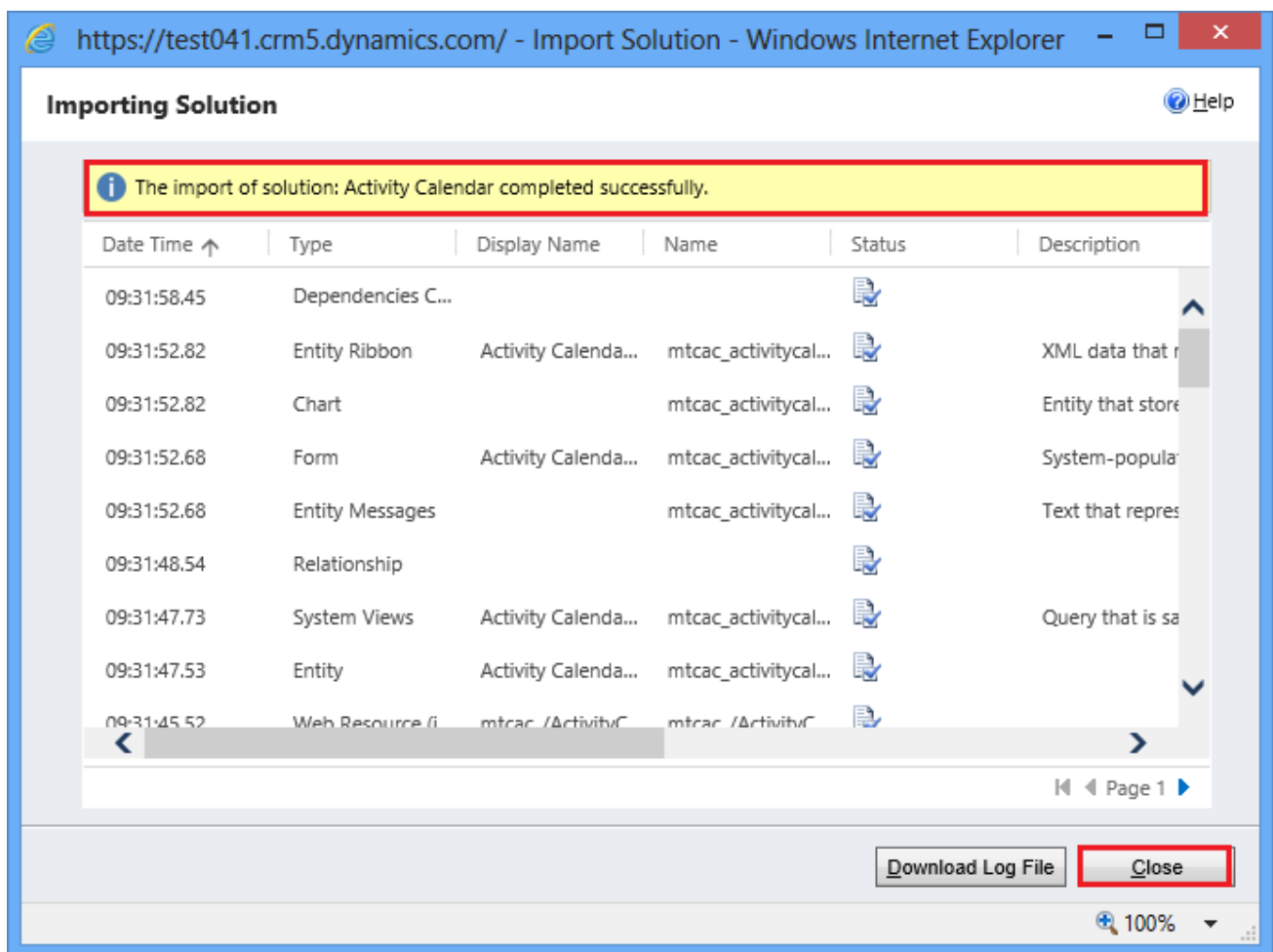
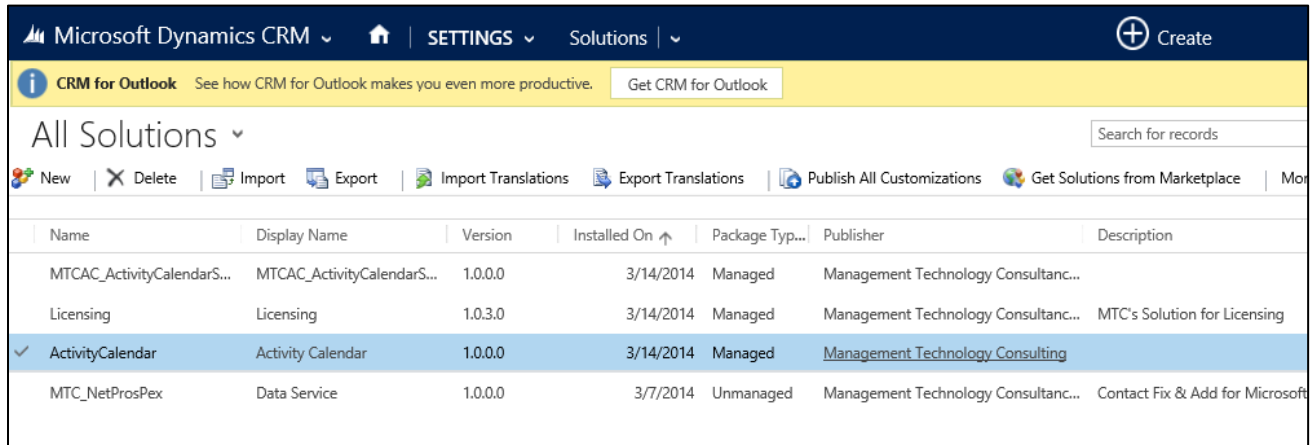


Figure 11: Importing Solution

- Select the product as **Activity Calendar** and double click

Activating License Key

- CRM->Settings->Solutions-> double click on Activity Calendar Solution



The screenshot shows the 'All Solutions' page in Microsoft Dynamics CRM. The 'ActivityCalendar' solution is selected and highlighted in blue. The table below lists the solutions installed in the system.

Name	Display Name	Version	Installed On	Package Type	Publisher	Description
MTCAC_ActivityCalendarS...	MTCAC_ActivityCalendarS...	1.0.0.0	3/14/2014	Managed	Management Technology Consultanc...	
Licensing	Licensing	1.0.3.0	3/14/2014	Managed	Management Technology Consultanc...	MTC's Solution for Licensing
ActivityCalendar	Activity Calendar	1.0.0.0	3/14/2014	Managed	Management Technology Consulting	
MTC_NetProsPex	Data Service	1.0.0.0	3/7/2014	Unmanaged	Management Technology Consultanc...	Contact Fix & Add for Microsoft

Figure 12: CRM showing the Solution installed

- Click on Activity Calendar Solution , which opens a new screen as shown below

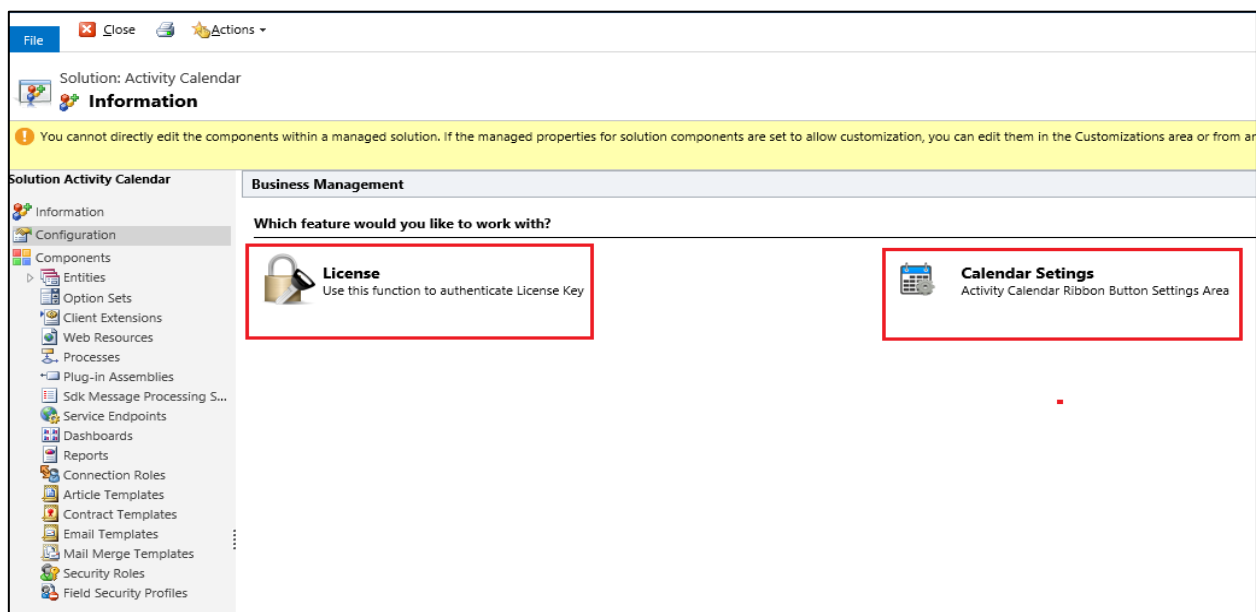


Figure 13: Activity Calendar Configuration

- Click on Licensing

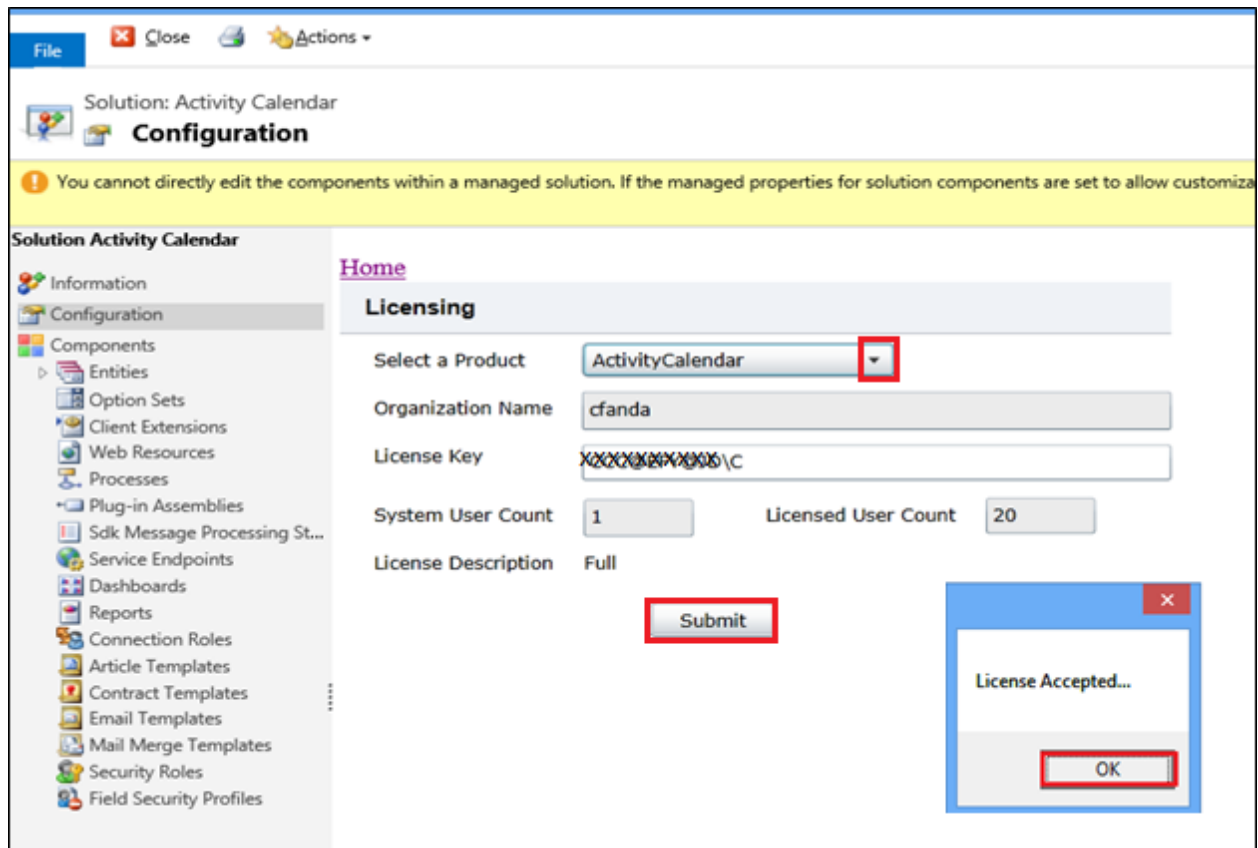


Figure 14: Placing of License Key

- Select Product as Activity Calendar
- Copy & Paste the License key which you have received from salesteam@mtccrm.com
- Click on Submit
- A pop up window appears and displays the message as License Accepted. Click on OK.

Activity Calendar Settings

- Now Click on Calendar Setting

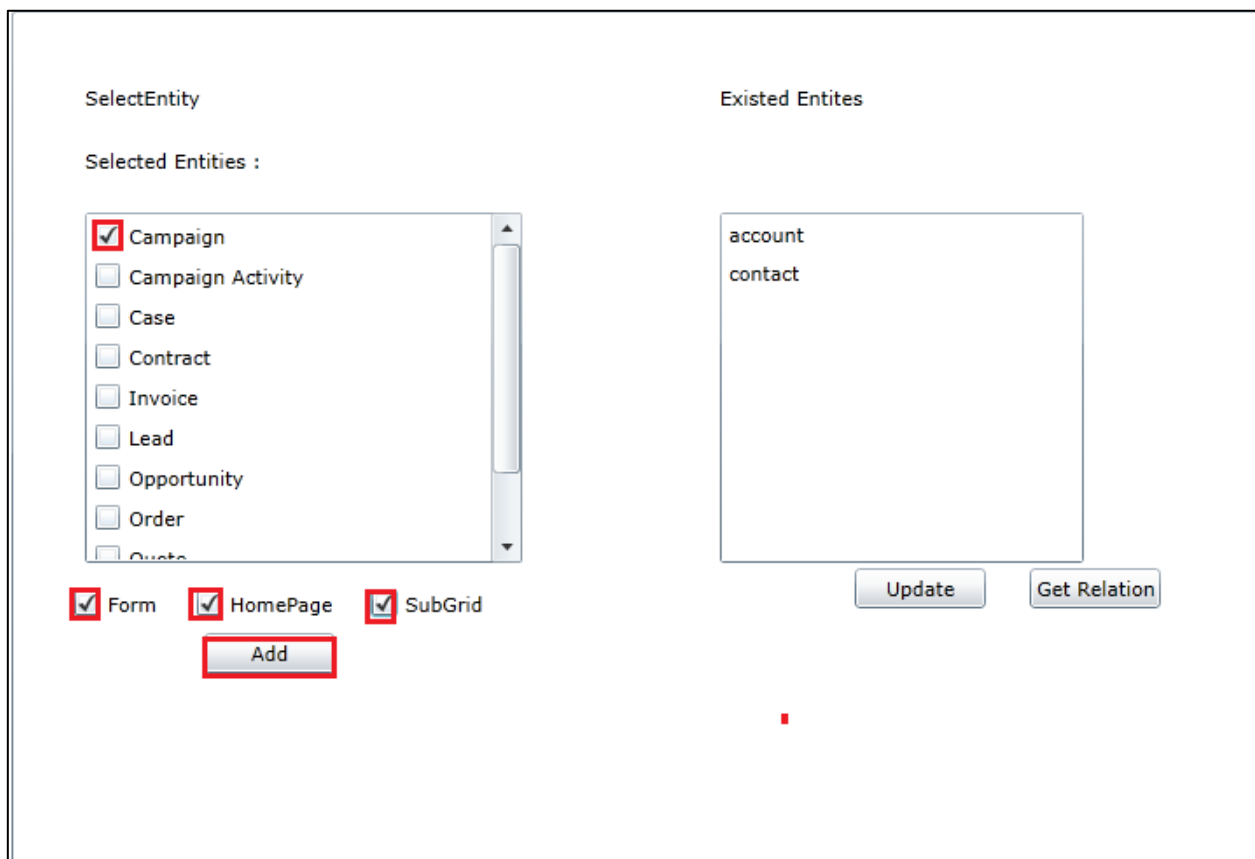
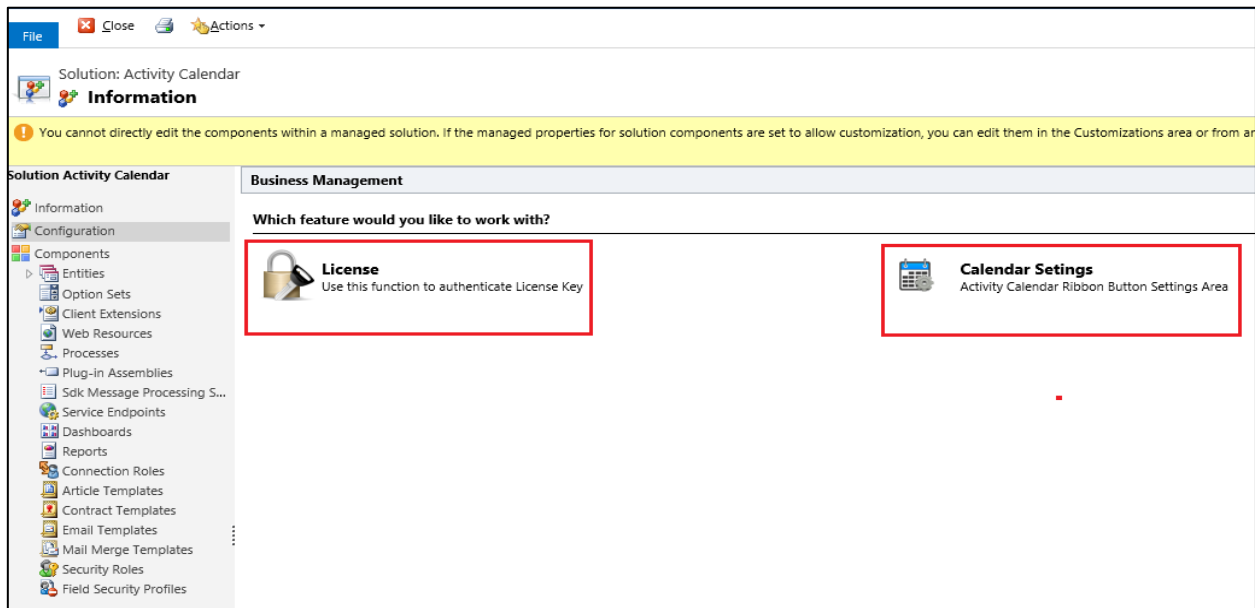


Figure 15: Select Entity

- Initially you will have two boxes displayed showing Selected Entities and Existed Entities
- Select Entities as shown above (example Campaign)

- Select Form or Homepage or Sub grid or all of them as per your choice and need to get display the Ribbon button.
- Click on Add, to move the Entity to Existed Entities.

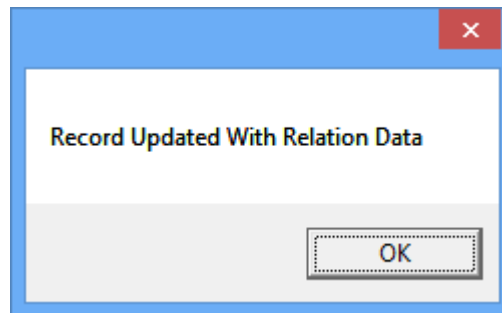
Figure 16: Showing Entities for the Selected Account

- Now after selecting Entities (example Account) from the Existed Entity as shown above
- Click on Get Relation Button placed under the Existed Entities box.
- All the Relations entities pertaining to the Entity (Account) will be displayed in the Third box as shown above

Figure 17: Showing Relation Entities for the Selected

- Select the Relation entities as shown above (example Lead)
- You can select one or more entities from this
- All the related Attributes for the Lead and Account are displayed in the fourth box as shown above.
- Select the Attributes from this box and click on save button.

- Also can check Multiple Attributes and Finally Click on SAVE button.
- On click a new pop up throws out a message “Records Updated with Relation Data”... Click on Ok



- Go Back to Main CRM

Note: The top right corner of the CRM screen shows the following icons when Activity Calendar is selected



- This image indicates the refresh icon. Using this we can refresh the Activity calendar.



- This image indicates the Full screen functionality. By clicking on this button Activity calendar functionality available in full screen mode. (It has toggle function)

(Note: Most of the screen shown below are captured in Full screen mode for easy understanding)



Today will display the current day and arrows indicates that backward and forward dates for easy navigation.

Dynamics 365 Solution - Trial License Activation/ Product License Purchase/ Additional User License Purchase

Please refer the below link for Trial License Activation and/or Product License Purchase and/or Additional User License Purchase for MTC's Dynamics 365 Solution.

<https://www.mtccrm.com/PLI>

In case of queries or issues, please write down to salesteam@mtccrm.com for quick help.

Activity Calendar Functionality

Activity Calendar is a Dynamics 365 / CRM 2013 is an add-on enhancement that allows organizations to be more joint effort interactive participation by allowing users to view Activities in the CRM calendar of multiple users within their organization.

- Click on Account, Select any account and also select the more button (...) to show or display Activity Calendar Button.

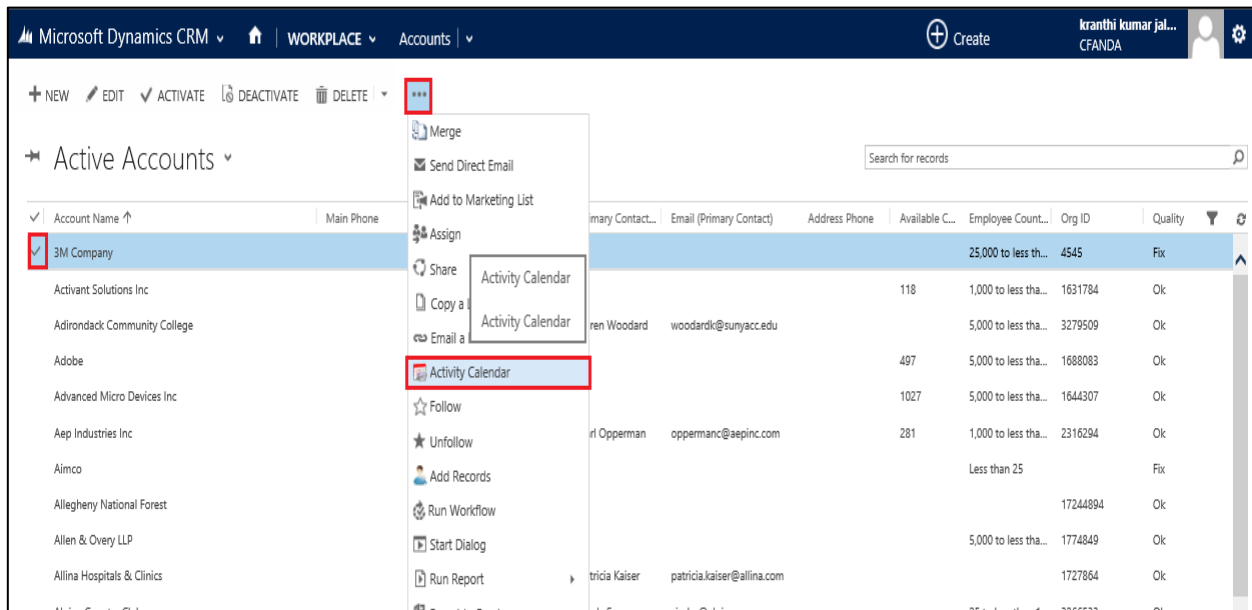


Figure 18: CRM Account View with Activity Calendar button

OR

- Click on Account, Open the Account form and also select the more button (...) to show or display Activity Calendar Button.

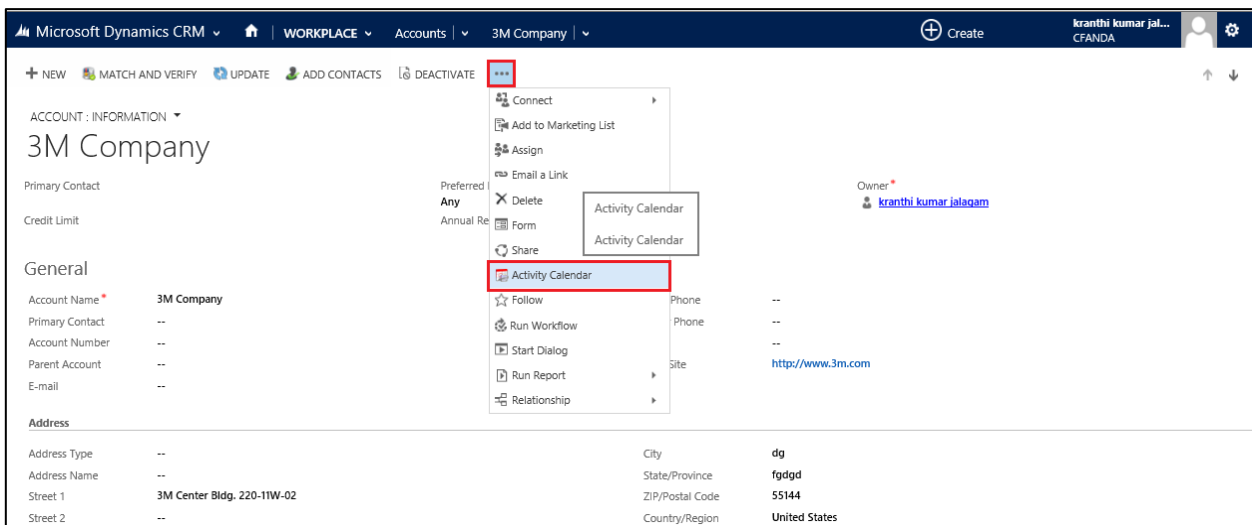


Figure 19: CRM form view with Activity Calendar Button

How to Create a New Activity

To Create a New Activity just Right click on the date or where ever it is required

- On selecting Create Activity, activity form is opened. Input the required data and save the form, it in turn reflects in the Activity Calendar.

The screenshot shows the 'Activity Calendar' application window. On the left, there's a 'Select Date' sidebar with a calendar for March 2015. The main area displays a calendar view for 27 Mar 2015. A context menu is open over the date, listing activity types: Appointment, Campaign Activity, Fax, Letter, Phone Call, Service Appointment, and Task. The 'Select Activities' sidebar on the left shows checkboxes for the same activity types, with 'Appointment' and 'Task' checked.

Figure 20: Create Activity

- The drop down list has all the Activities such as Appointment, Task, Service Appointment, Phone Call, Letter, Fax and Campaign Activity as shown below
- To View the calendar to your choice first Select the Calendar date, followed by selecting the Activities as shown below
- Either you can select one or more users or Select All or even Deselect all for easier selecting options. (as shown below)

The 'Select Date' sidebar shows a calendar for March 2014. The date 18 (Tuesday) is highlighted in orange.

The 'Select Activities' sidebar shows checkboxes for various activity types: Appointment, Task, Service Appointment, PhoneCall, Letter, Fax, and Campaign Activity. The 'Select All' button is highlighted.

Calendar View – Day

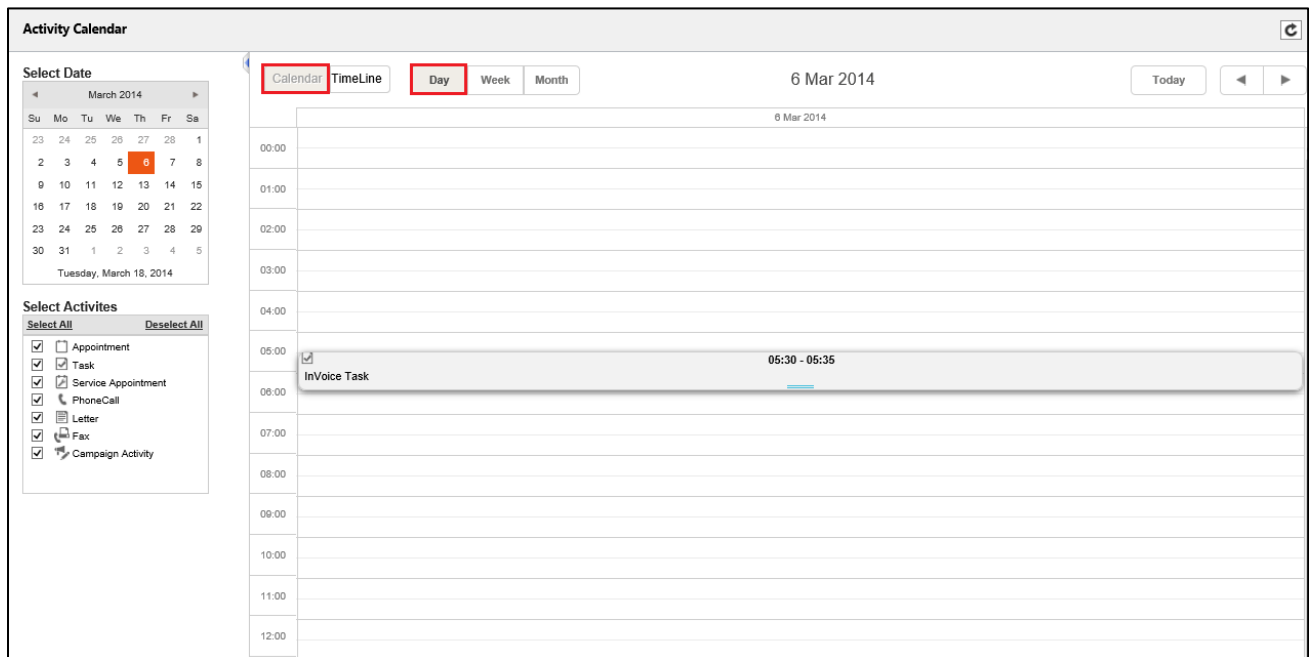


Figure 21: Calendar view - CRM

- The working pane has Date Calendar on top, and Activities list at the bottom.
- The right side of screen displays the Calendar with activities details for the day
- To create a new Activity, double click on the date
- New pop up window opens as shown below

Calendar View – Week

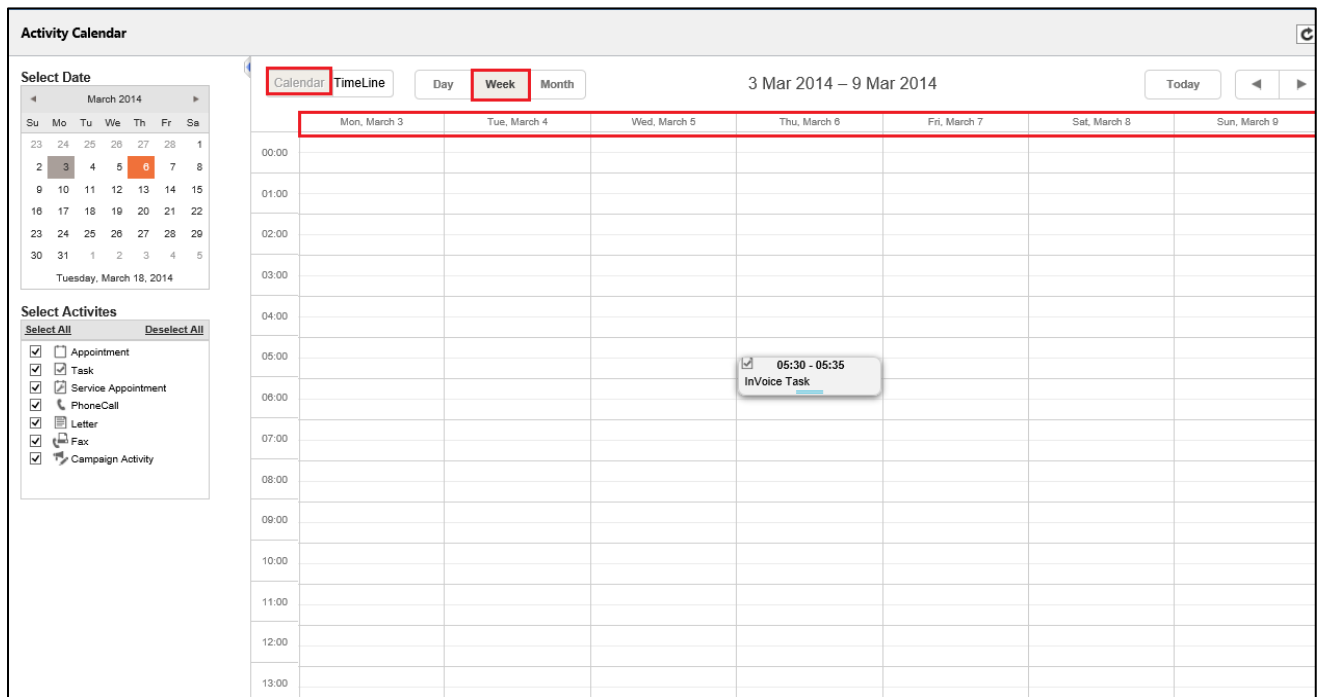


Figure 22: Calendar View – Week

- Here in this Weekly wise calendar, one can view always for the selected week from Monday to Sunday.
- Adding Activity is similar operation as shown above.



Figure 23: Calendar View – Week Enlarged

Calendar - Month

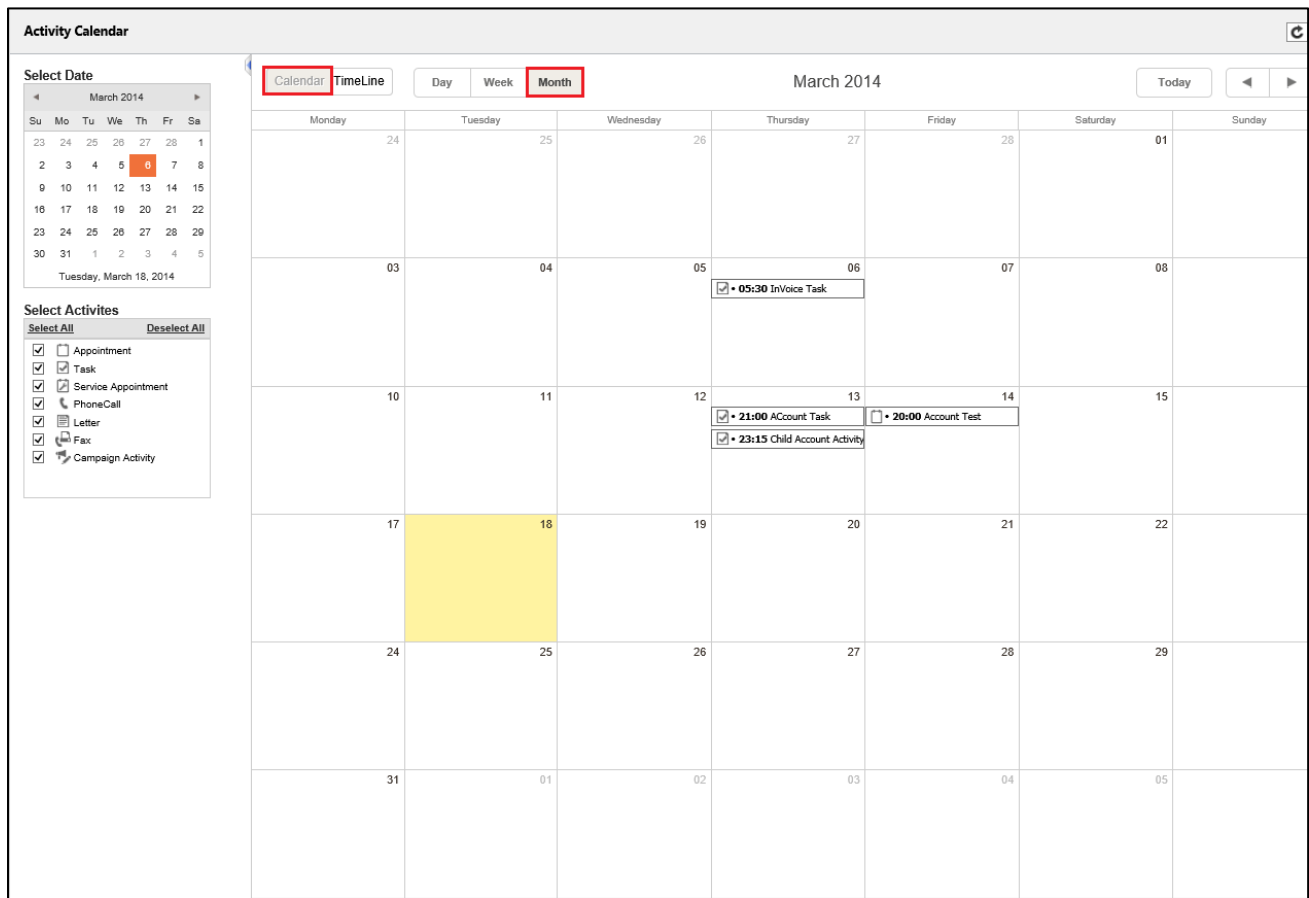


Figure 24: Calendar View - Month

Time Line View – Day Wise (0 Hrs. to 23 Hrs.)

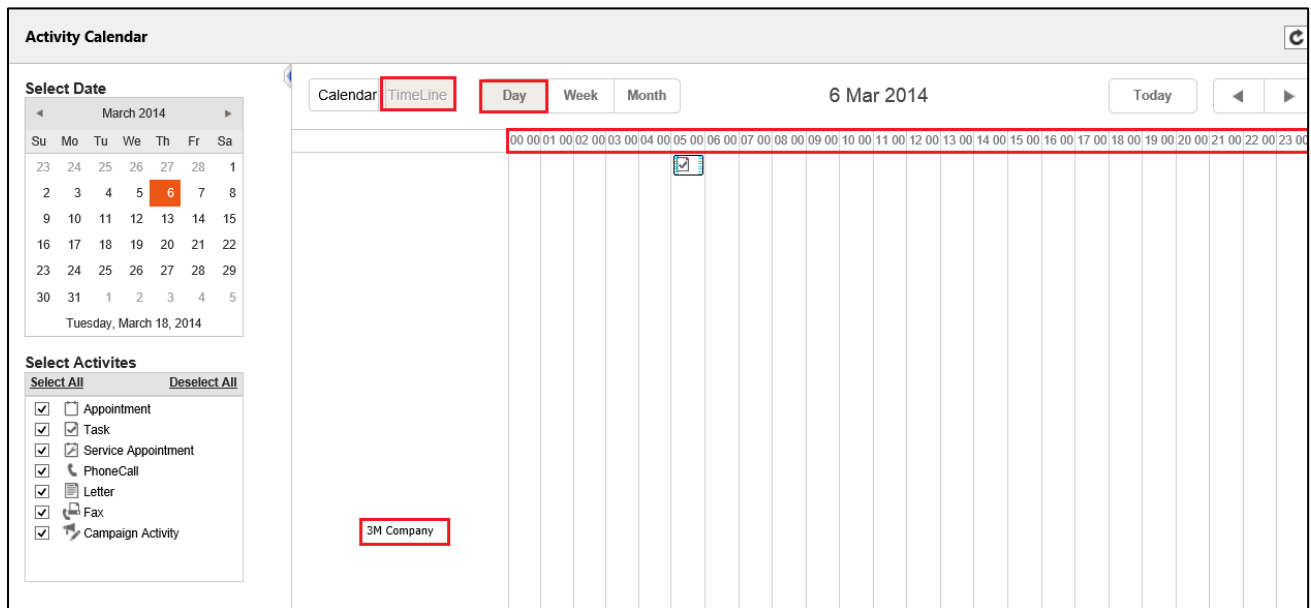


Figure 25: Time Line View Day (Hours) wise

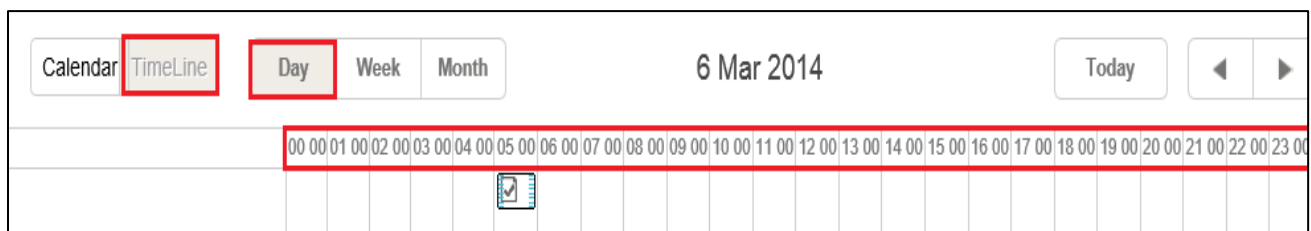


Figure 26: Time Line Hours View Enlarged

- In this Tile Line View you can view all the activities for the Selected Day on Hourly basis

Time Line View – Week Wise (Mon - Sat.)

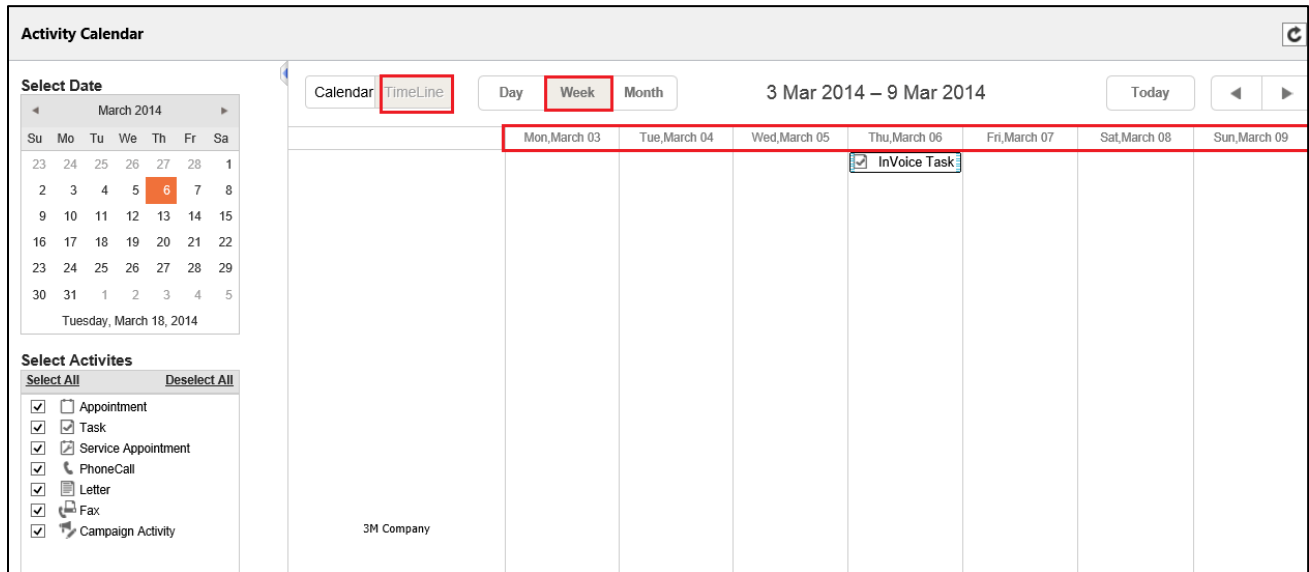


Figure 27: Time Line Week Day wise

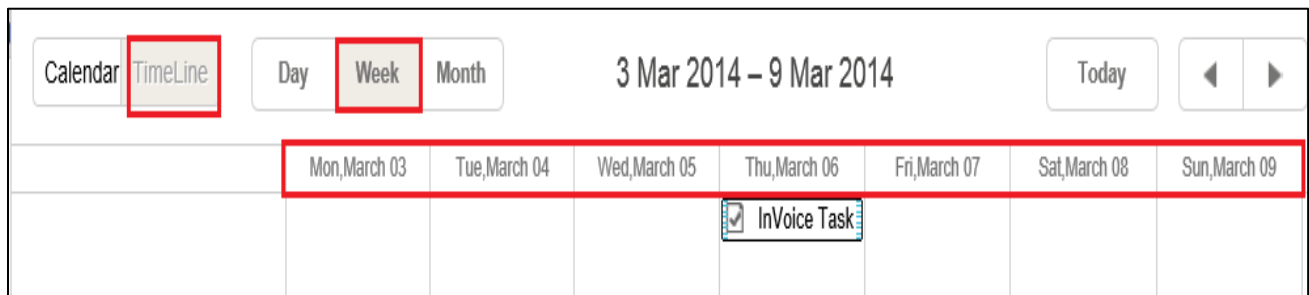


Figure 28: Time Line Week View Enlarged

- Weekly Calendar always displays for the selected week (i.e. from Monday to Saturday)

Time Line View – Month Wise

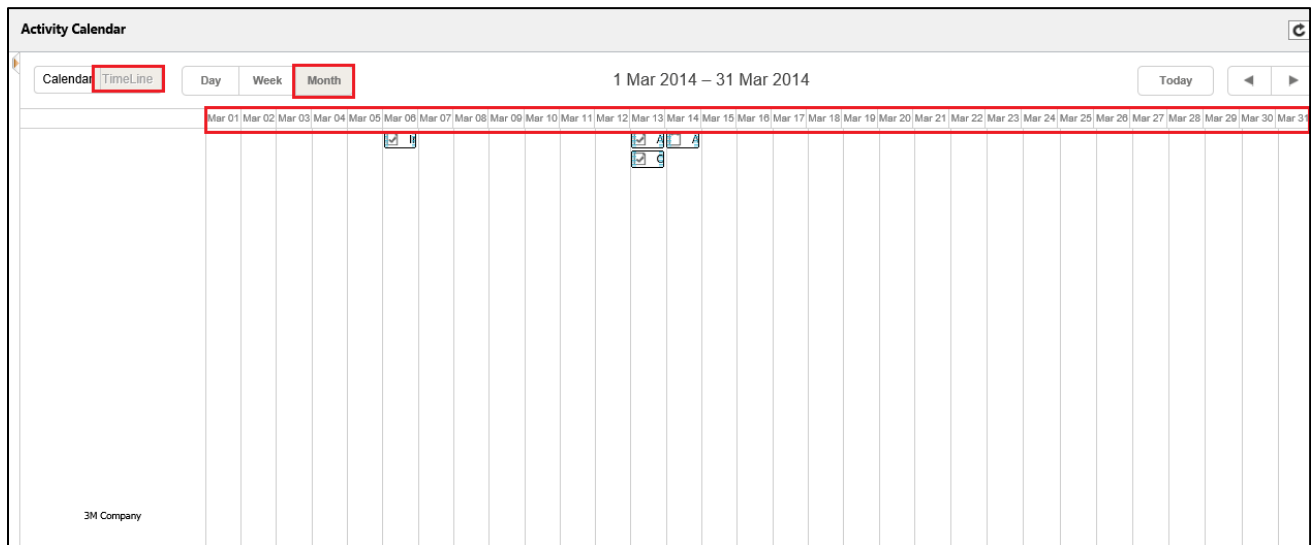


Figure 29: Time Line Monthly View Date wise

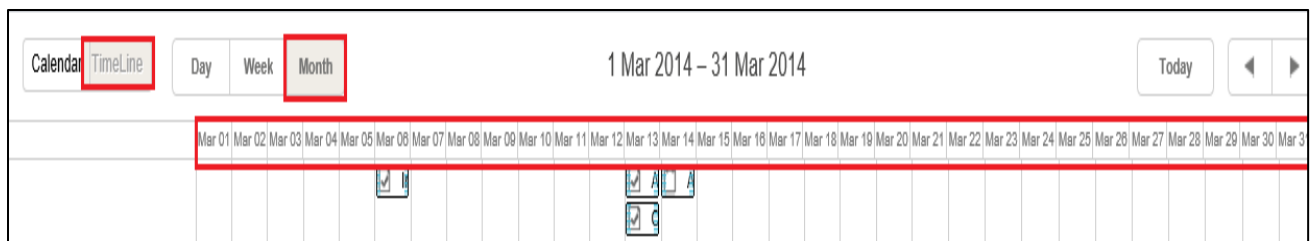


Figure 30: Time line view - Monthly Enlarged

- If selected Month and Time Line option, the Calendar is displayed for the selected month showing all Dates from 1 to 30 or 31st

Important to Note

1. In any view of the calendar, user has the option to Select all Activities or Deselect all Activities or Select only few activities which are necessary to view
2. Apart from the regular view of the calendar user can also have Time Line view of calendar as shown above
3. User has option to Drag & drop any activity on the Calendar
4. Even in Time Line view user can change the Activity timings by dragging the icon on both the ends.

Drag & Drop Activities

- User can Drag any the activites from one date to another or One time schedule to another.
- After the Activity is draged to another date or place as required, the system asks for confirmation of the same as shown below - Click OK to confirm and proceeed further

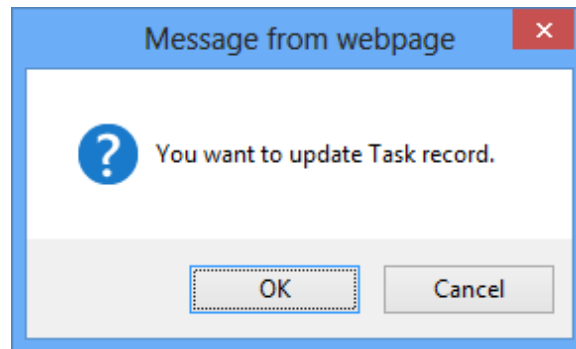


Figure 31: Drag & Drop - Message

Uninstallation Process

- To uninstall Activity Calendar, Navigation is Settings → Solutions → Select the check box of Activity Calendar then click on Delete as shown below.

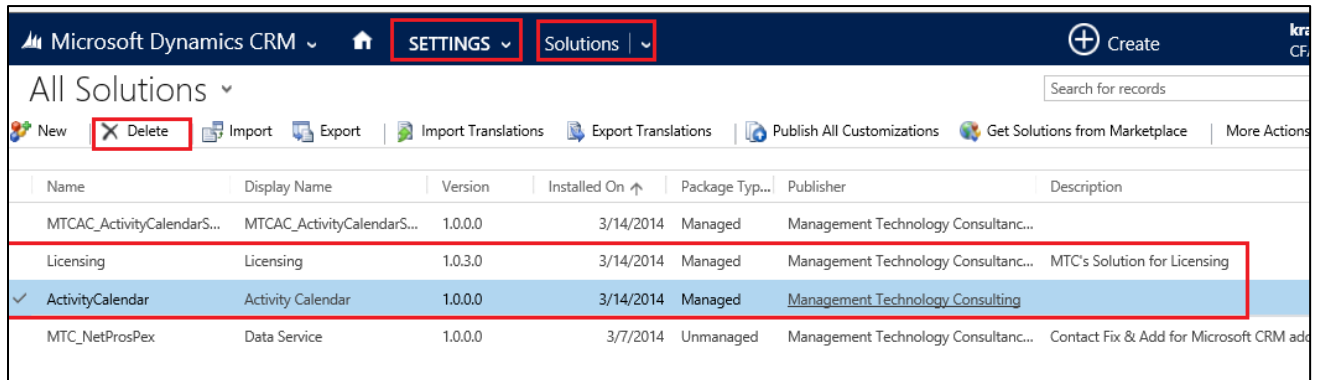


Figure 32 : Deleting Activity Calendar Solution

- Click on OK to delete the solution from CRM. The solution will be deleted

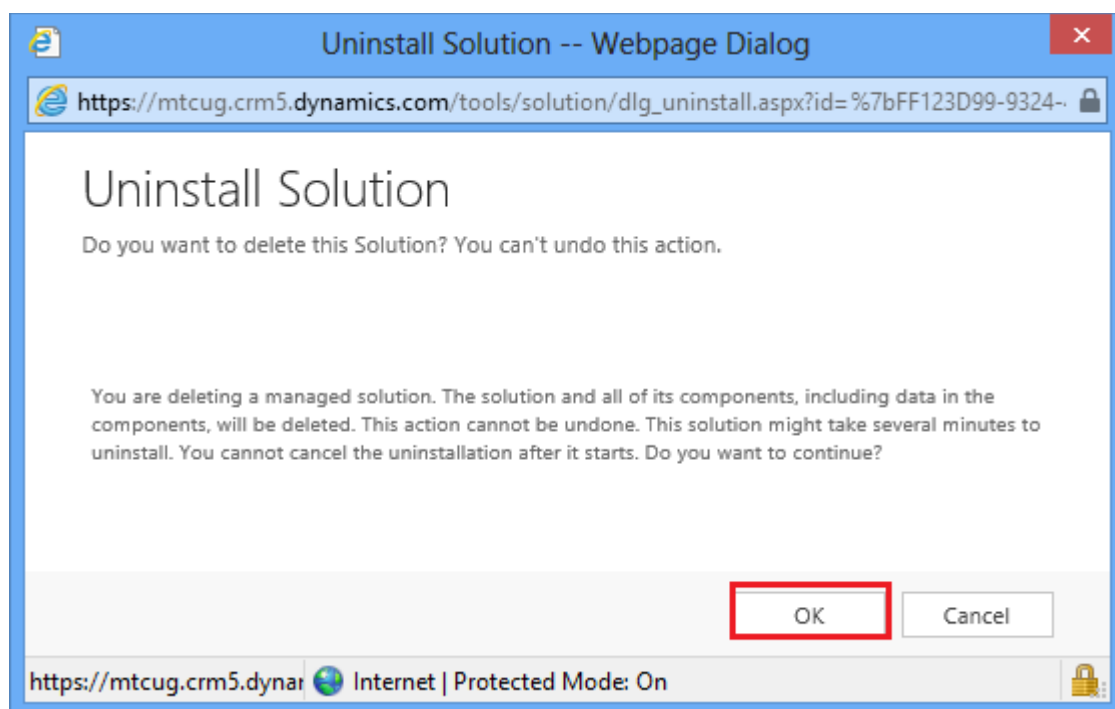


Figure 33 : Uninstall Solution

- Follow the above process to delete the Licensing solution also.

MTC Overview

MTC develops an ever growing and extensive family of add-on products, complete solutions, and core development technologies for the Dynamics 365 / CRM platform. MTC supports a product development effort with a highly efficient global Dynamics 365 / CRM exclusive services business 24/7. MTC's products represent the refinements in functionality, deliverability, and long-term maintainability of unique highly customized Dynamics 365 / CRM platform business solutions suggested as most important in MTC's global volume customization business. MTC runs its internal operations and many of its partners and affiliates with this example



Small and medium sized businesses (SMB) can now affordably build the kind of enterprise automation system that distinguishes the best unique-line-of-business enterprises on earth. MTC uniquely delivers a very-unique service of clear value to businesses globally seeking automation as a business advantage.

SMB Custom Enterprise is your business's exact fit for a complete low cost business-specific companywide automation solution - marketing to operations to accounting in a closed loop - built on the Microsoft Dynamics XRM platform technologies. Starting with the Dynamics 365 / CRM platform in either a monthly Online or wholly owned on premise implementation you choose from a large and growing set of packaged option functionality where you determine what non-standard additional functions you want on this solution, then add them.

For more information on the dozens of integrated products of the "SMB Custom Enterprise" solution set visit: www.MTCCRM.com MTC's low-cost and fixed-rate professional services current rate schedule: www.MTCCRM.com/MTC_Services.pdf.

Management Technology Consulting LLC (MTC) is dedicated exclusively to the Dynamics 365 / CRM platform and CRM web technologies in the business of delivering add-on products and services.



portal

MTC is a Microsoft Independent Solution Vender working on Dynamics 365 / CRM since the introduction of the platform. MTC's product offerings include development technologies for the Dynamics CRM platform, add-on enhancements of features and major functions to CRM, as well as complete vertical-market Enterprise versions of Dynamics CRM serving an every growing list of industries and organization types.



MTC's services are built on a global 24/7 rapid-response and low-cost and fixed-rate ease of engagement. MTC is US headquartered company optimized for low-cost on-demand global engagement with regionalized contacts and a development facility in Hyderabad India adjacent to Microsoft's facility.

The Global CRM Community DynamicsExchange.com

MTC is the founding and managing partner of the Dynamics 365 / CRM platform Community at www.DynamicsExchange.com. Dynamics Exchange is crowd-source built and dedicated to driving down the costs of implementation and enhancement of the Dynamics 365 / CRM platform with unique and innovative social networking and knowledge resource allocation processes.

Dynamics Exchange is the leading community free and open to Dynamics 365 / CRM uses and professionals for support, training, knowledge, products, and services worldwide.

End User License Agreement (EULA)

Important – Read Carefully. This MTC End-User License Agreement (“**Agreement**”) is a legal agreement between you (on the one hand) and Management Technology Consulting, LLC (**MTC**) and its OEM partner(s). (“**OEM**”) (On the other hand), for the CRM Managed Solution software product identified within (the “**Product**”), which includes computer software and may include printed materials, and online or electronic documentation. By installing, copying, or otherwise using this Product, you agree to be bound by the terms of this Agreement. If you, the End-User, do not agree to the terms of this Agreement, do not install or use this Product.

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5. The Product is intended for use solely by End-User for their own internal purposes. The Product may only be used on the CRM Organizational Unit licensed and paid for by End-User to the MTC. End-User agrees not to copy, modify, sub-license, assign, transfer or resell the Product, in whole or in part. End-User agrees not to translate, reverse engineer, decompile, disassemble, or make any attempt to discover the source code of the Product (except and only to the extent applicable law prohibits such restrictions). End-User further agrees not to download/upload the Product, in whole or in part, or to establish a network, place data on the Internet, or offer a service bureau utilizing the Product. End-User agrees to restrict access to the Product to designated employees and to use its best efforts to prevent violation of these restrictions by agents, employees and others, taking such steps and reasonable security precautions as may be necessary. End-User shall permit MTC and/or its representative access to its premises during normal business hours to verify compliance with the provisions of this Agreement.
6. This license authorizes use of the Product on a single CRM Organizational Unit, which shall mean a single Organizational Unit
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8. All UPDATES provided by MTC and its affiliates shall be considered part of the Product and subject to the terms and conditions of this Agreement. Additional license terms may accompany UPDATES. By installing, copying, or otherwise using any UPDATE, End-User agrees to be bound by this Agreement and any terms accompanying each such UPDATE. If End-User does not agree to the additional license terms accompanying such UPDATES, do not install, copy, or otherwise use such UPDATES.
9. End-User agrees that MTC and its affiliates may collect and use technical information End-User provide as a part of support services related to the Product.
10. End-User acknowledges that the Dynamics 365 / CRM Managed Solution “Product” is of U.S. origin and agrees to comply with all applicable international and national laws that apply to the Product, including the U.S. Export Administration Regulations, as well as end-user, end-use and destination restrictions issued by U.S. and other governments.
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F. Customer Care details

MTC is always open to global community of Dynamics 365 / CRM platform Software Users



Availability and hours of operation: Monday to Friday

USA PST 323-851-5008 - 8:00 AM to 6:00 PM

India IST 323-863-0077 - 8:30 PM to 8:30 AM in PST

USA Headquarters:

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7738 Sky hill Drive, Los Angeles, CA 90068

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