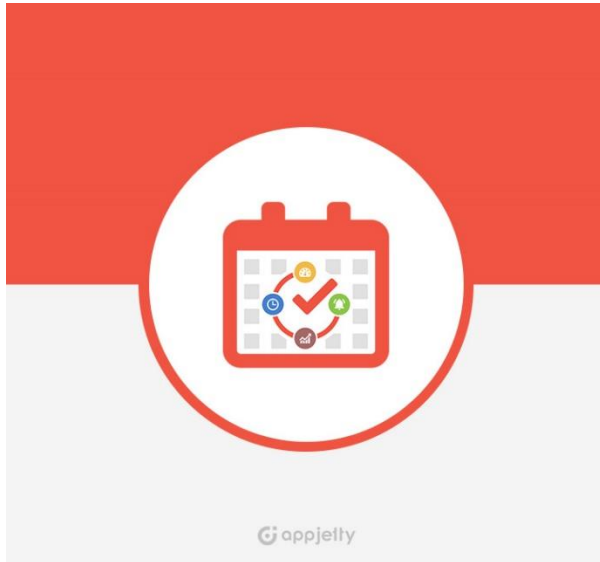


## USER MANUAL



## Calendar 365

**Version: 5.0**

**Compatibility:**

Microsoft Dynamics 365 (Online and On-premise)

**Browser Compatibility:**

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

## TABLE OF CONTENTS

Introduction .....	1
Benefits of Calendar 365 .....	1
Pre-requisites.....	2
Installation .....	2
Installation Steps.....	2
Configuration Steps.....	5
Calendar Management .....	21
Calendar Activities .....	36
Calendar Views .....	58
List View .....	58
Gantt View.....	61
Top Down View .....	63
Timeline View.....	65
Agenda View .....	68
Un-installation Steps.....	70
Contact Us.....	71

# Introduction

Calendar 365 from AppJetty is a calendar solution for Dynamics CRM. This solution by AppJetty helps you to manage your activities like Tasks, Appointments, Recurring Appointments, Campaign Activity, Phone Calls, Letters, Fax, Emails and Service Activity. It also lets you create and manage your own desired activities through Custom Activities. Apart from managing activities, you can view holidays of the country specified by the admin. You can also look at the activities from one of the statuses including 'Open', 'Cancelled', 'Completed' and 'Scheduled'.

With this plugin you can view the activities along with their attachments in the calendar through multiple views like List View, Gantt View, Timeline View, Top Down View, and Agenda View along with timelines like Day, Day Span, Week and Month View. Based on the configured number of minutes by the admin, you can receive reminder and email notification for the activities. Admin User can also customize the look of the activities and view the calendars of other team members and resources as well. You can also share, display, and reassign activities in other user's calendars. Using Calendar 365 you can view activities related to user, facility/equipment, contacts as well as account based on preference selected.

## Benefits of Calendar 365

- User can manage multiple CRM activities like Tasks, Appointments, Recurring Appointments, Campaign Activity, Phone Calls, Letters, Fax, Service Activity and Emails.
- User can create, edit, and delete custom activities in calendar.
- User can manage attachments for Emails, Appointments, and Custom Activities.
- User can view activities in calendar based on resource selection. Resources can be user/team, facility/equipment, contacts or accounts.
- User can also view activities based on modules related to account or contact.
- User can receive reminder for the activity through a notification.
- User can receive reminder for the activity through an Email notification.
- User can share activities via email.
- User can view the Holidays from the Calendar.
- User can see activities in different views like List view, Gantt view, Timeline view, Top down view, Agenda view along with its details from the tooltip attributes configured.
- User can also view the calendar in Day, Week, Month and Day Span View.
- User can view the activities as per their preferred status like Open, Scheduled, Canceled, Completed.
- User can convert activities to case and opportunity.
- User can convert email activities to lead directly from the calendar.
- User can also complete activities directly from the calendar.
- Admin user can easily customize the look of all the activities.
- Multi-Language Support.

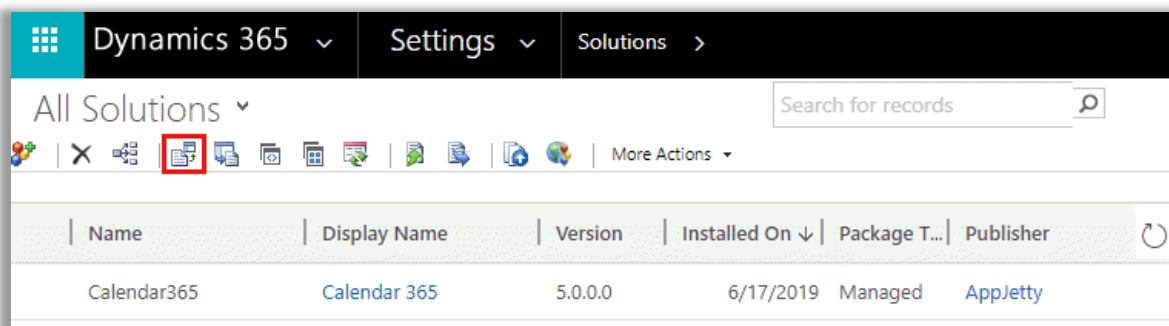
## Pre-requisites

- Following points must be followed before starting the Plugin installation:
  - You should be logged into Dynamics CRM Online.

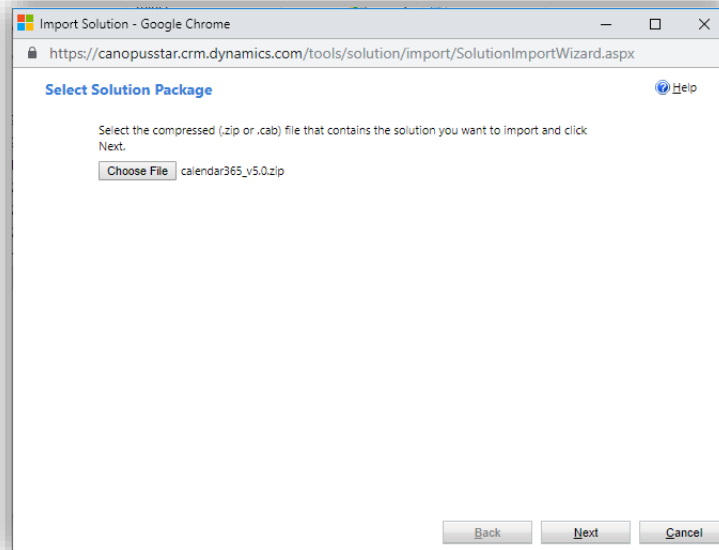
## Installation

### Installation Steps

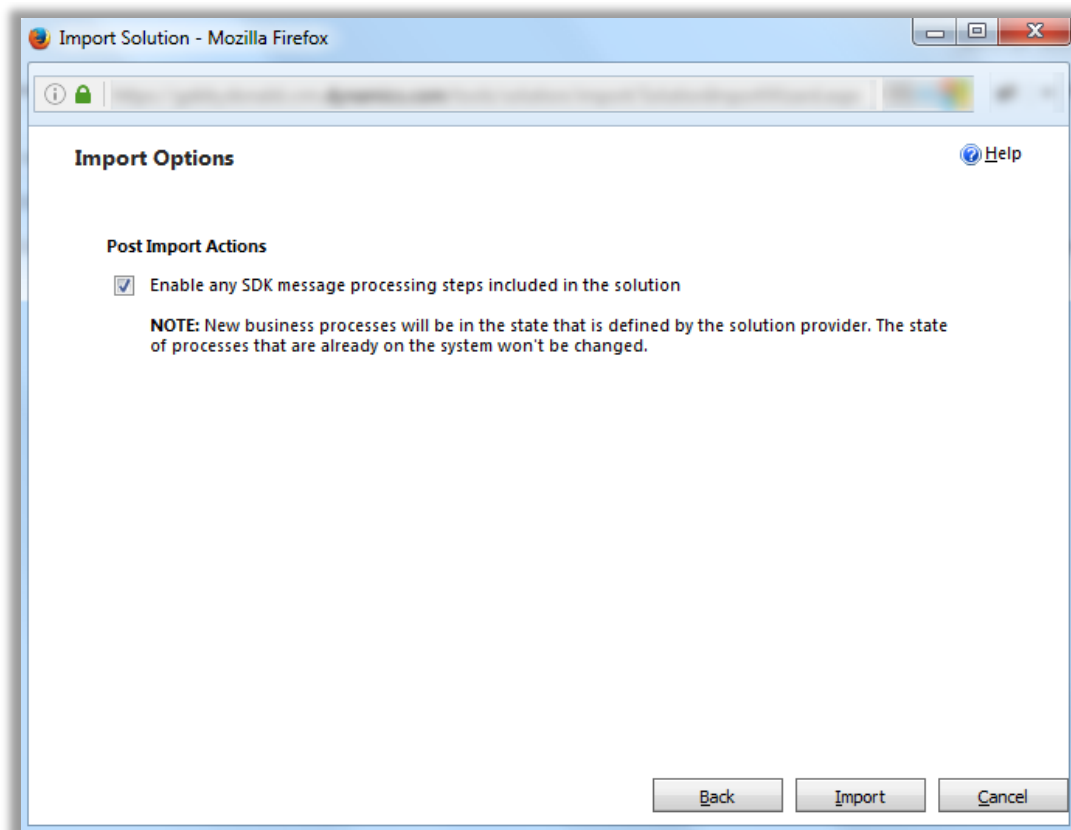
- To install the “Calendar 365” plugin, the following steps are to be followed
- On purchasing the plugin, you will get a zip file named **calendar365\_v5.0.zip**
- Login into your CRM Account and click on **Settings ->Solutions**
- Click on ‘**Import**’ to upload and install the Solution.



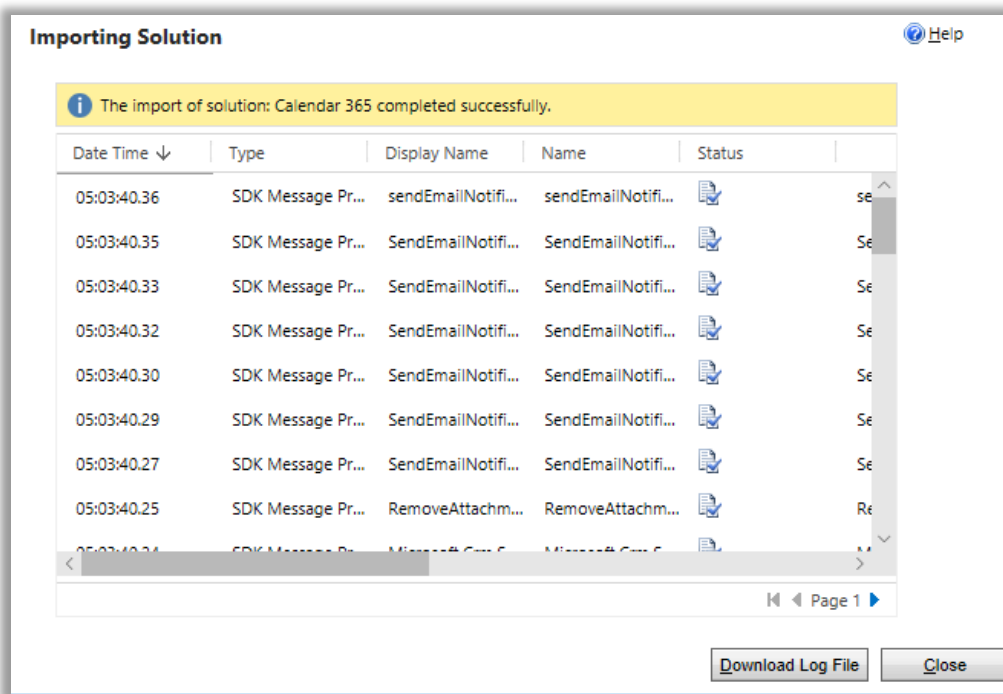
- Click on ‘**Browse**’ button and choose the Package Zip File for Calendar 365 from the Import Solution Window.



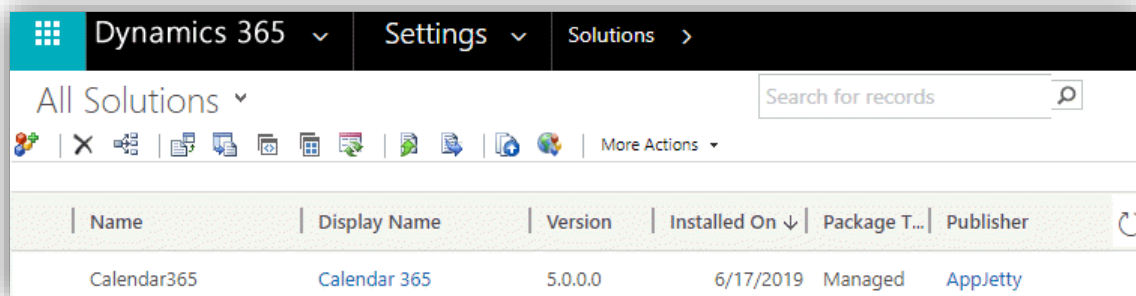
- Click on Next for further processing.



- Check the box to enable any SDK message processing steps included in the solution and click on 'Import' button to Import the Solution. It opens the new window that shows the process of importing solution.

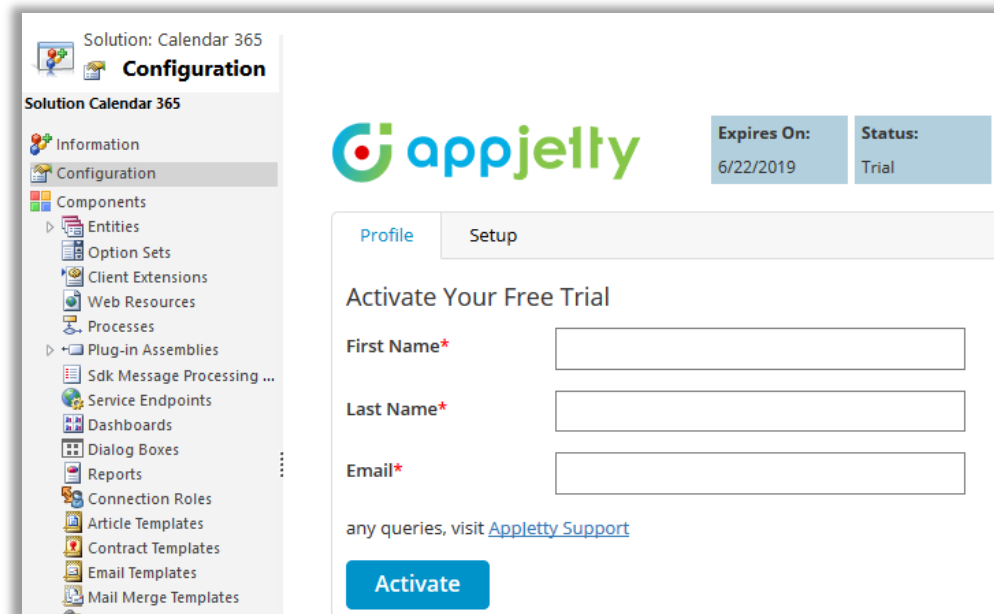


- Click on 'Close' button after successful completion message is displayed.
- Once you import the solution, it will be displayed in the solutions grid view.

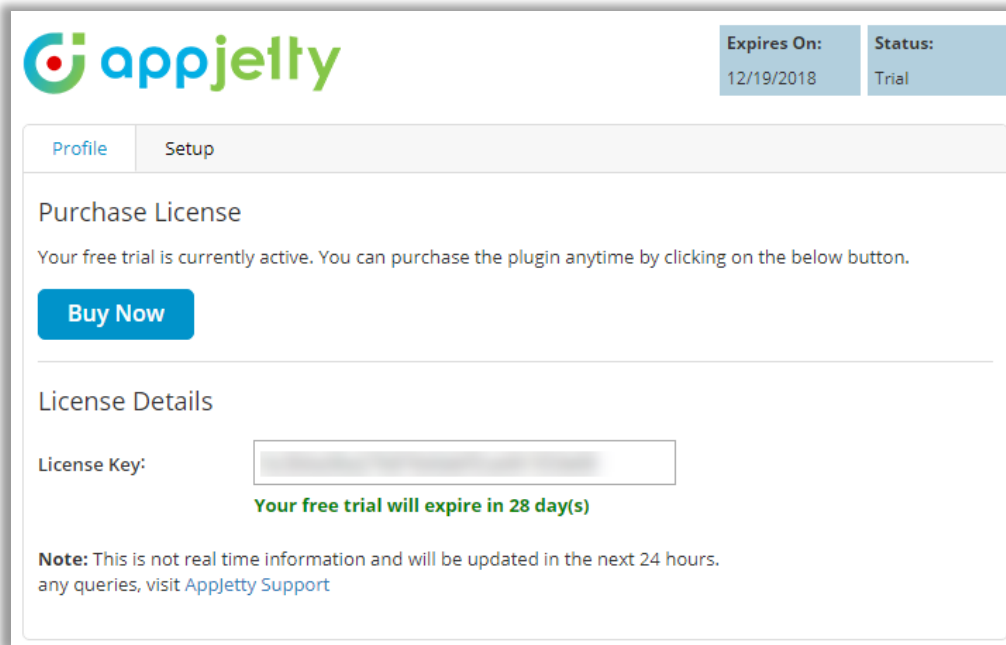


## Configuration Steps

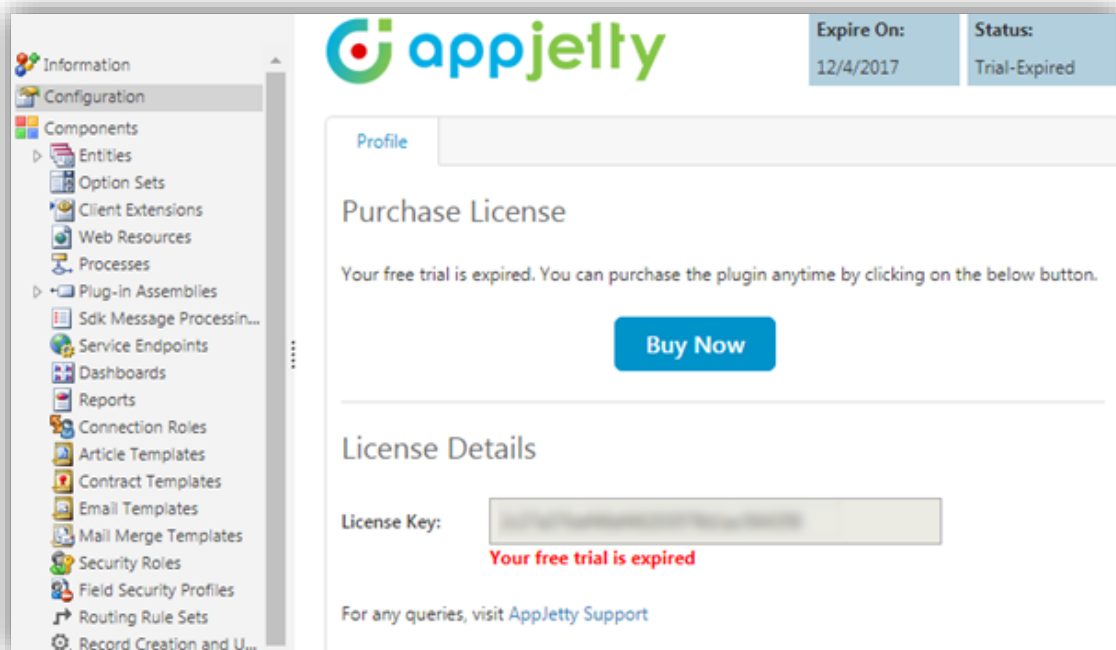
- To configure Calendar 365, following steps must be followed:
- Double click on '**Calendar 365**' display name to configure the plugin with your license key.
- This will open a new window. Click on '**Configuration**' from the options provided on the left side panel of the page.



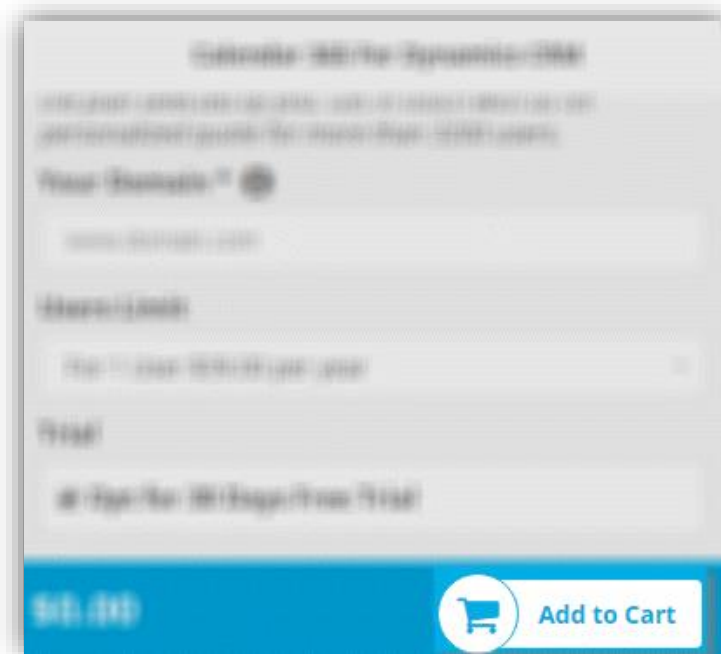
- You can activate your one-month free trial.
- To get a one-month free trial license key fill out the details and click on '**ACTIVATE**' button.
- Your trial will get activated and expiry date will be displayed on top.



- You can purchase the licensed version any time. To purchase the license, click on 'Buy Now' button.



- 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 product page and a pop-up will appear. Click on 'Add to Cart' button and complete the purchase process.



- On successfully completing the purchase process, you will receive your license key via email along with steps to complete the license configuration.
- Click on '**Activate**' button to activate your license.



Profile

Setup

### License Details

License Key:

**The plugin has been activated and your next payment cycle will be initiated on 7/14/2018**

any queries, visit [AppJetty Support](#)

### Manage Users

Total allowed license user: 1

Remaining license user: 4

Delegated Admin  
INTEGRATION  
Support User  
SYSTEM  
Mark Smith

>  
<

Yenki Tech

Save

- After submitting the valid license key, you will be navigated to the **'Setup'** tab.
- You can manage Default Configuration Settings from here for:
  - Views
  - Activities
  - Unscheduled Activities
  - Conflict Management
  - Notifications
  - Holidays
  - Locations
  - Upcoming Events
  - Error Logs

- Configure Languages

Profile

Setup

Views

Contact Calendar ?	All selected (6) ▼
Account Calendar ?	Leads ▼
Calendar View ?	List View ▼
Time Scale View ?	Day ▼
Number Of Days ?	2 ▼
Slot Duration ?	15 Minutes ▼

Activities

Task

Fax

Phone Call

Email

Letter

Appointment


Recurring Appointment

Service Activity

Campaign Activity

Custom Activity

Task ? ☒

Default Color ? #00aabb 

☐ High
 ☐ Normal
 ☐ Low

Overwrite Priority Color ? ☐

Tooltip Attribute ? 5 selected ▼

Details Attribute ? 5 selected ▼

Email Reminder ? ☐ On ☒ Off

Minutes ? 0

Buttons Configuration ?
 

☒ Convert To Opportunity
 ☒ Convert To Case

☒ Mark As Complete
 ☒ Mark As Close

### Unscheduled Activities ?

Active ? ☐

### Conflict Management ?

Active ? ☒

### Notifications

Notifications ? ☐ On ☒ Off

Minutes ?

### Holidays ?

[How to generate Google Calendar API Key?](#)

Active ? ☐

Color ?

Google Calendar API Key ?

Country ?

### Locations ?

[How to generate Google Autocomplete API Key?](#)

Active ? ☐

Google Autocomplete API Key ?

### Upcoming Events

Duration ?

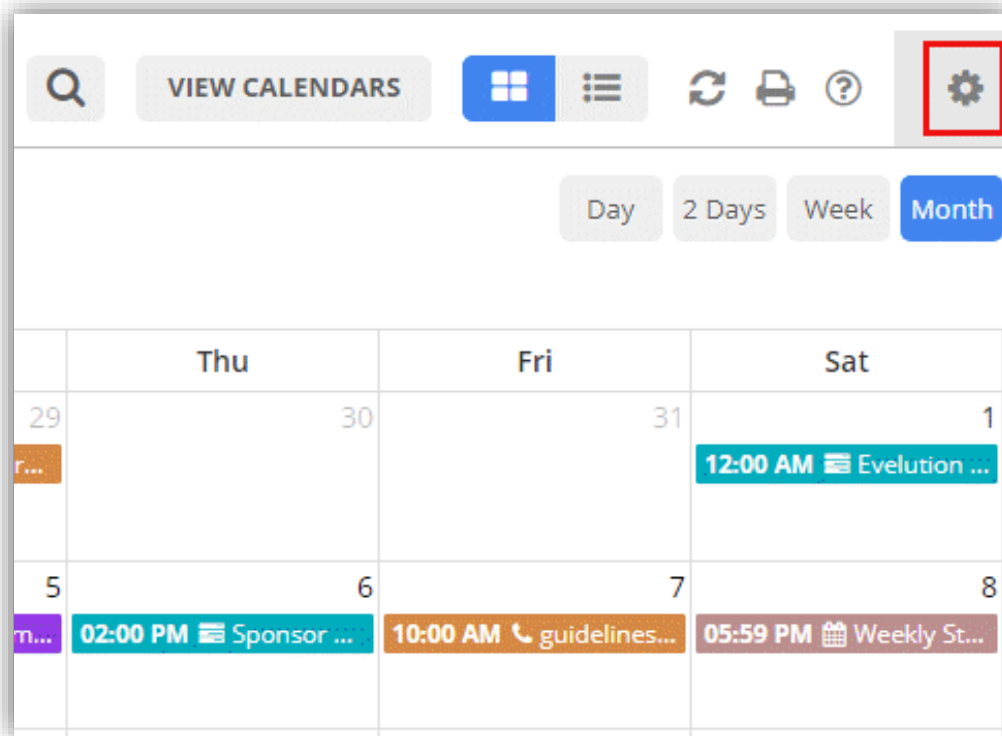
### Error Logs

Active ? ☒

Save

Configure Languages

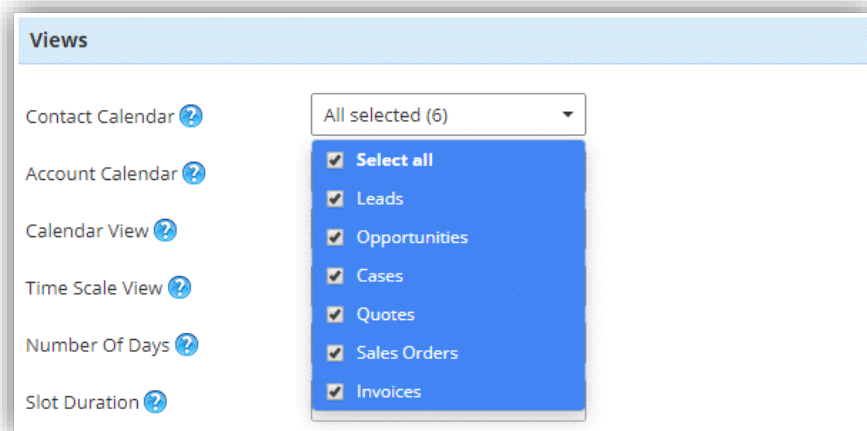
- You can also manage the Default Configuration Settings directly from the Calendar 365 by clicking on the **'Gear'** icon available on the calendar page.



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

### Views:

- To configure the default view of the calendar, navigate to the **'Views'** section. It will include following dropdown menus:
  - Contact Calendar:** You can select entities related to contact you want to include in calendar. Entities related to contact are Leads, Opportunity, Case, Quote, Sales Order, Invoice.



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

**Note:** Only the entities that are added from set up page will be available in the calendar for user to select from.

- **Calendar View:** You can set any of the Default Calendar View of the calendar from the following:
  - List View
  - Gantt View
  - Top Down View
  - Timeline View
  - Agenda View

The screenshot shows a configuration panel titled "Views". It contains several settings, each with a dropdown menu. The "Calendar View" dropdown is open, showing a list of options: "List View", "List View", "Gantt View", "Top Down View", "Timeline View", and "Agenda View". The "Gantt View" option is highlighted in blue. A red rectangle is drawn around the dropdown menu.

Views	
Contact Calendar ?	All selected (6)
Account Calendar ?	Leads, Cases
Calendar View ?	List View List View Gantt View Top Down View Timeline View Agenda View
Time Scale View ?	
Number Of Days ?	
Slot Duration ?	15 Minutes

- **Time Scale View:** You can set the default Time Scale View of the calendar from the following:
  - Day
  - Week
  - Month

Views

Contact Calendar ?

All selected (6) ▼

Account Calendar ?

Leads, Cases ▼

Calendar View ?

List View ▼

Time Scale View ?

Day ▼

Day

Week

Month

Number Of Days ?

15 Minutes ▼

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

Views

Contact Calendar ?

All selected (6) ▼

Account Calendar ?

Leads, Cases ▼

Calendar View ?

List View ▼

Time Scale View ?

Day ▼

Number Of Days ?

2 ▼

2

3

4

5

Slot Duration ?

- **Slot Duration:** Select the slot duration for top down view from available durations options: 15, 30, 45, and 60 Minutes.

Views	
Contact Calendar ?	All selected (6) ▼
Account Calendar ?	Leads, Cases ▼
Calendar View ?	List View ▼
Time Scale View ?	Day ▼
Number Of Days ?	2 ▼
Slot Duration ?	<div> 15 Minutes ▼  15 Minutes  30 Minutes  45 Minutes  60 Minutes </div>

#### Activities:

- To configure the Activities of the calendar, navigate to the **‘Activities’** section.
- It will include tabs for Task, Fax, Phone Call, Email, Letter, Appointment, Recurring Appointment, Service Activity, Campaign Activity, and Custom Activity and each of the activity tab will contain following fields:
  - **Activity:** You can check the checkbox besides the activity name to display the activity in the calendar by default.
  - **Default Color:** You can select the default color for the activity to be displayed in the calendar.
  - **Overwrite Priority Color:** You can also set the color for the activity as per the priority of the activity. There will be mainly High, Medium, and Low priority for the activity also the color set as per the priority will overwrite the default color of the activity.
  - **Tooltip Attribute:** You can select the tooltip attributes from the list of different attributes to be included in activity tooltip that appears on hovering the activity in the calendar. From the list, you can at max select 10 attributes and minimum one attribute should be selected or else it will show validation message stating to select at least one attribute.
  - For selecting attributes, check the boxes besides attributes which you wish to include.

- **Details Attribute:** You can select the details attributes to be included in activity detail that appears on clicking the activity in the calendar, from the list of different attributes available. From the list, you can at max select 10 attributes and minimum one attribute should be selected or else it will show validation message stating to select at least one attribute.
- For selecting attributes, check the boxes besides attributes which you wish to include.
- **Email Reminder:** You can enable / disable the email reminder for an activity.
  - **On:** Choose **'On'** to enable Email reminder of the activity
  - **Off:** Choose **'Off'** to disable Email reminder of the activity
- **Minutes:** Enter the number of minutes before which you want to send the reminder for the activity through email to the users included for the specific activity.
- **Buttons Configuration:** Select the action buttons that you wish to include in the calendar. These action buttons are the ones which if enabled lets you perform those actions directly from the calendar. 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 Close. While Recurring Appointment activity has end series button, email has Convert to Lead button and Campaign activity has Close Campaign Activity button in addition.

Activities

Task

Fax

Phone Call

Email

Letter

Appointment

Recurring Appointment

Service Activity

Campaign Activity

Custom Activity

Task ?

☒

Default Color ?

#00aabb

Overwrite Priority Color ?

☐ High
 ☐ Normal
 ☐ Low

Tooltip Attribute ?

5 selected

Details Attribute ?

5 selected

Email Reminder ?

☐ On
 ☒ Off

Minutes ?

0

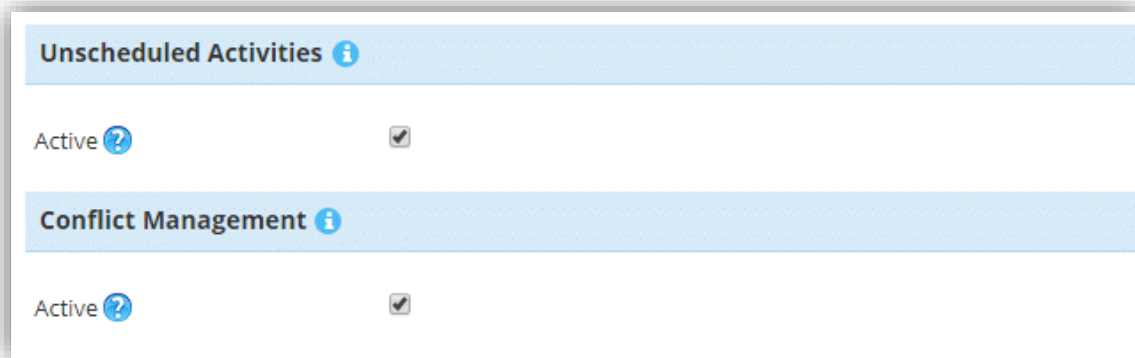
Buttons Configuration ?

☒ Convert To Opportunity
 ☒ Convert To Case

☒ Mark As Complete
 ☒ Mark As Close



**Note:** Once you have enabled the **'Email Reminder'**, you will receive a reminder email for the activity. User who has created the activity will receive the mail on the email address configured during account creation.



### Unscheduled Activities:

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

### 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 alerts when conflicts occur at the time of scheduling of appointments or service activities.

### Notifications:

- To manage the notification reminder of the activities, navigate to the **'Notifications'** section.
- It will include following fields:
  - Notifications:**
    - To enable the notification reminder of the activity, click **'On'** button. By clicking on the **'On'** button the **'Minutes'** field will be enabled.
    - To disable the notification reminder of the activity, click **'Off'** button. By clicking on the **'Off'** button, the **'Minutes'** field will be disabled.
  - Minutes:**
    - You can set the number of minutes before which you want the notification reminder of the activity from this field.

Notifications

Notifications ?

☒ On
 ☐ Off

Minutes ?

5

## Holidays:

- To manage the holidays, navigate to **'Holidays'** section.
- It will include following field:
  - Active:** Check the checkbox to activate the holidays in the calendar
  - Color:** Set the color to be displayed for the Holiday in the calendar
  - Google Calendar API Key:** Enter the Google Calendar API Key for the holidays to be displayed in the calendar as per your selected country
  - Country:** Select the country whose holidays are to be displayed in the calendar

Holidays

How to generate Google Calendar API Key?

Active ?

☒

Color ?

#090909

Google Calendar API Key ?

AlzaSyD1HvnIEU8Oygm5xVIDC

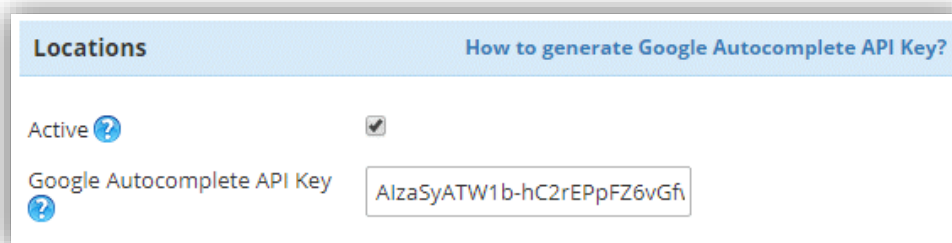
Country ?

USA ▼

**Note:** To generate the Google Calendar API Key refer to: <https://console.developers.google.com/apis>. You can directly navigate to this page from the configuration page by clicking on the available link.

## Locations:

- To activate location suggestions in the calendar, navigate to '**Locations**' section and check the active box to enable them.

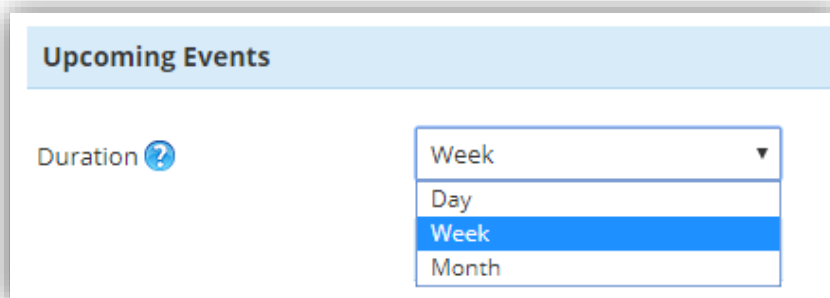


- If enabled, you need to enter Google Autocomplete API key that you have in order to get location suggestions.

**Note:** To generate the Google Autocomplete API Key refer to: <https://developers.google.com/places/web-service/autocomplete>. You can directly navigate to this page from the configuration page by clicking on the available link.

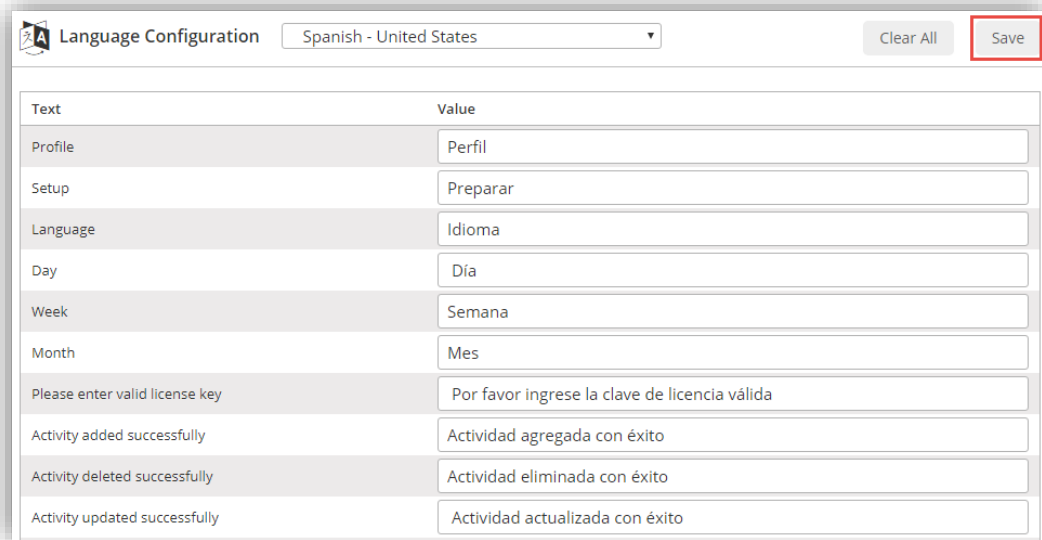
## Upcoming Events:

- You can set the default view of the '**Upcoming Events**' from this section. It will contain following fields:
  - Duration:** You can select the any of the default view for '**Upcoming Events**' from the Day, Week or Month.
  - Save:** Click on '**Save**' button to save all the configurations settings for Calendar 365.



## Configure Languages:

- You can also configure language of your choice by clicking on Configure Languages button available on Configurations page.
- On configure language page, select the language from dropdown that you wish to configure messages for.



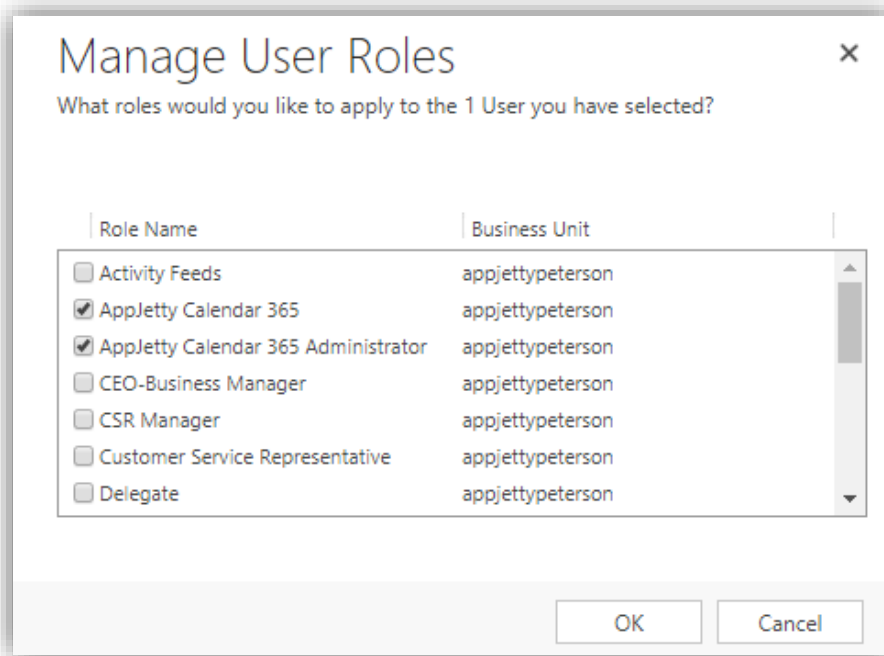
Text	Value
Profile	Perfil
Setup	Preparar
Language	Idioma
Day	Día
Week	Semana
Month	Mes
Please enter valid license key	Por favor ingrese la clave de licencia válida
Activity added successfully	Actividad agregada con éxito
Activity deleted successfully	Actividad eliminada con éxito
Activity updated successfully	Actividad actualizada con éxito

- Here, user needs to add translations themselves for the messages in the language of their choice.
- Click on save button to save the language translations.

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

## Assign User Role:

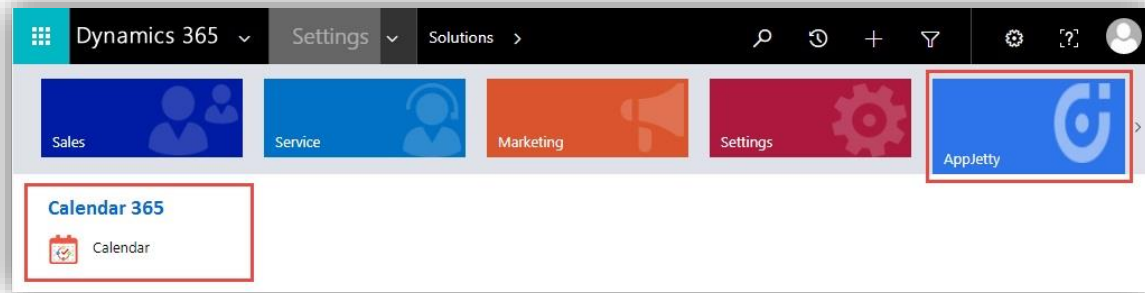
- To manage the user roles, navigate to Settings -> Security -> Users.
- Now select the users whose roles are to be managed and click on 'MANAGE ROLES'. This will open a pop up to select roles.
- To access AppJetty product entities, assign 'AppJetty Calendar 365' role to selected users.



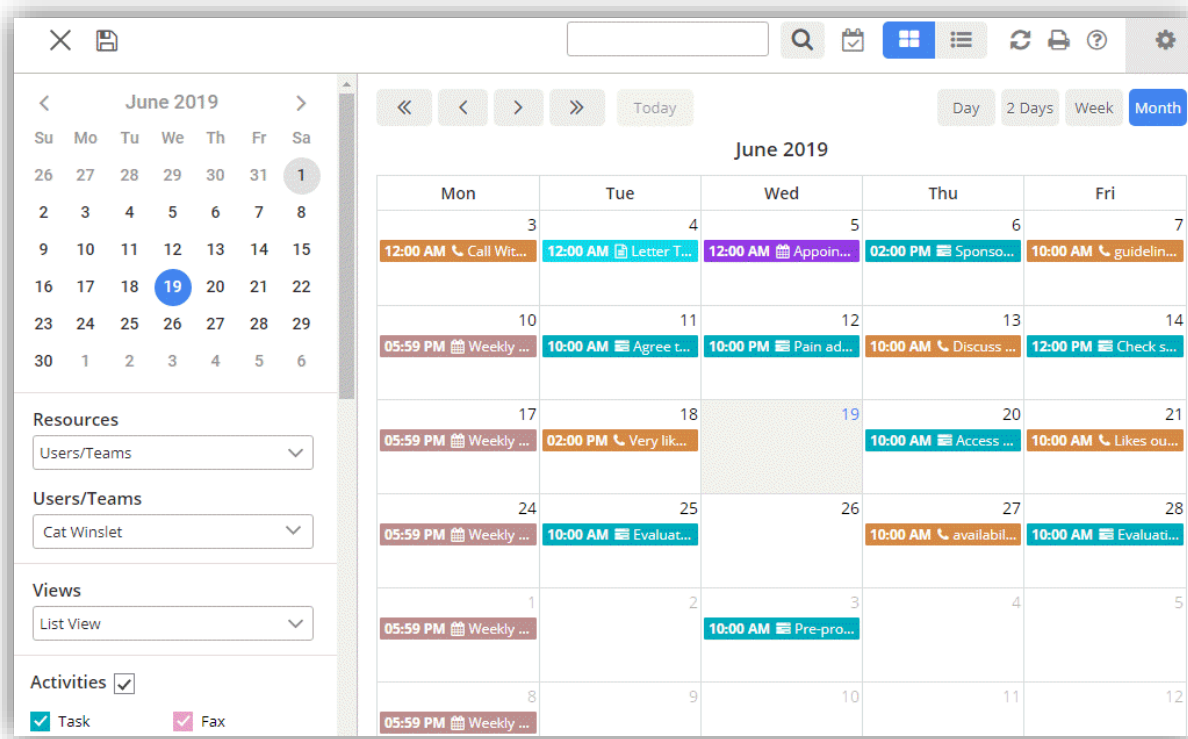
**Note:** System Administrator will also be able to access AppJetty Product Entities.

# Calendar Management

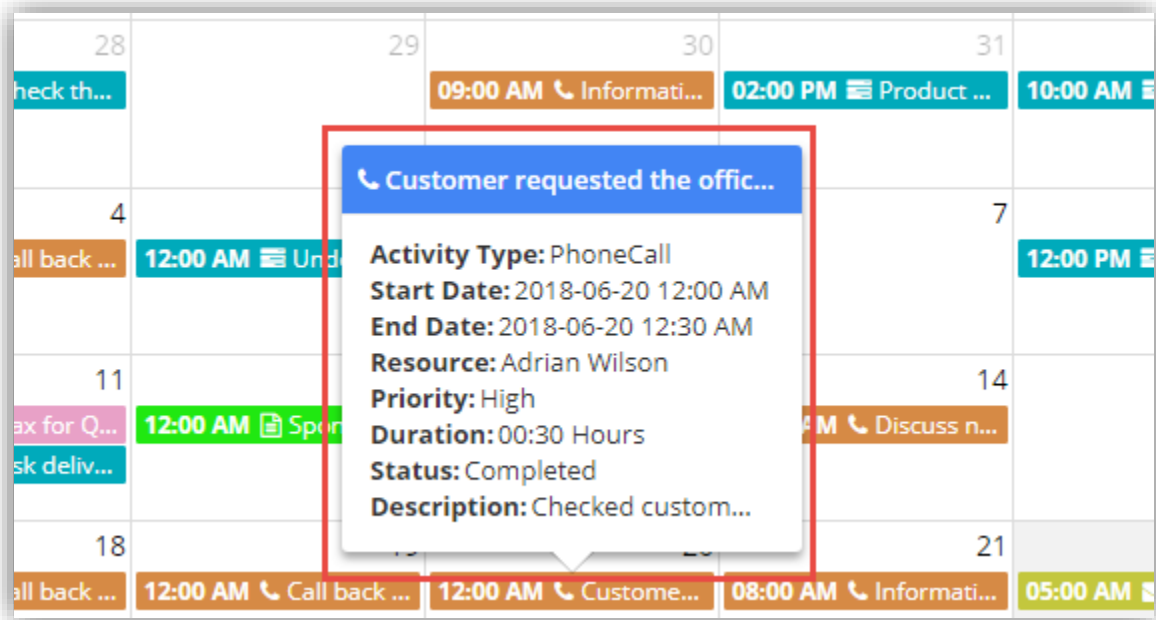
- To open the Calendar 365, following steps must be followed:
- Go to AppJetty -> Calendar 365



- Click on 'Calendar 365' tab.
- Calendar page would load, and all the activities will be displayed in the calendar as per the default configuration made from the backend.



- **Activity Details:** To view the Activity Details, hover the mouse on the activity and the enabled tooltip for the activities will be displayed.



- To manage the activities which are to be displayed in the calendar, navigate to '**Activities**' section on the left-hand side of the calendar.
- Thereafter, check the checkbox besides the activity to display the particular activity in the calendar. Here it will show only those activities that are enabled from the configurations page.

**Activities** ☒

<input checked="" type="checkbox"/> Task	<input checked="" type="checkbox"/> Fax
<input checked="" type="checkbox"/> Phone Call	<input checked="" type="checkbox"/> Email
<input checked="" type="checkbox"/> Letter	<input checked="" type="checkbox"/> Appointment
<input checked="" type="checkbox"/> Service Activity	<input checked="" type="checkbox"/> Campaign Activity
<input checked="" type="checkbox"/> Recurring Appointment	

**Custom Activities**

None selected

**Status** ☐

<input checked="" type="checkbox"/> Open	<input type="checkbox"/> Completed
<input type="checkbox"/> Canceled	<input checked="" type="checkbox"/> Scheduled

**Overwrite Priority Color**

<input type="checkbox"/> High
<input type="checkbox"/> Normal
<input type="checkbox"/> Low

- To manage the Custom Activities which are to be displayed in the calendar, navigate to '**Custom Activities**' section on the left-hand side of the calendar.
- Thereafter, check the checkbox besides the activity to display the activity in the calendar.

**Custom Activities**

2 selected

Search

<input type="checkbox"/> <b>Select all</b>
<input type="checkbox"/> Anniversary
<input checked="" type="checkbox"/> Customer Service
<input checked="" type="checkbox"/> Birthday

- To view the activities as per their statuses, navigate to '**Status**' section and check the checkbox besides each option to display the activities with statuses in the calendar.



**Activities** ☒

☒ Task ☒ Fax

☒ Phone Call ☒ Email

☒ Letter ☒ Appointment

☒ Service Activity ☒ Campaign Activity

☒ Recurring Appointment

**Custom Activities**

None selected

**Status** ☐

☒ Open ☐ Completed

☐ Canceled ☒ Scheduled

**Overwrite Priority Color**

☐ High

☐ Normal

☐ Low

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

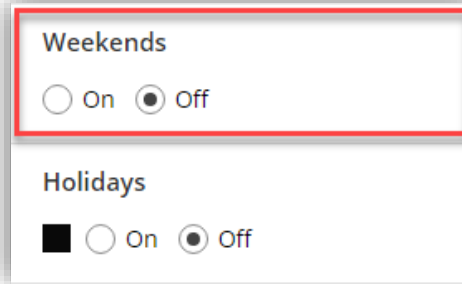
**Overwrite Priority Color**

☒ High

☐ Normal

☒ Low

- To enable / disable weekends in the calendar navigate to the **‘Weekends’** section.
  - To enable weekends select **‘On’** button.
  - To disable weekends, select **‘Off’** button.



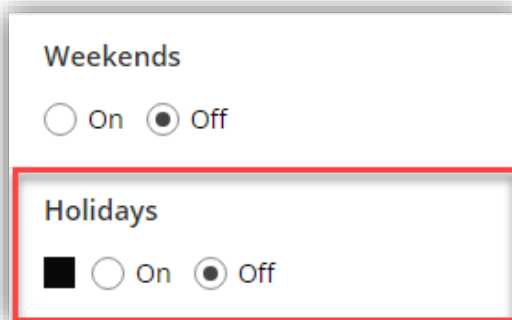
Weekends

☐ On ☒ Off

Holidays

☒ ☐ On ☐ Off

- To enable holidays in the calendar, navigate to the **'Holidays'** section and check the checkbox besides the **'Holidays'**.



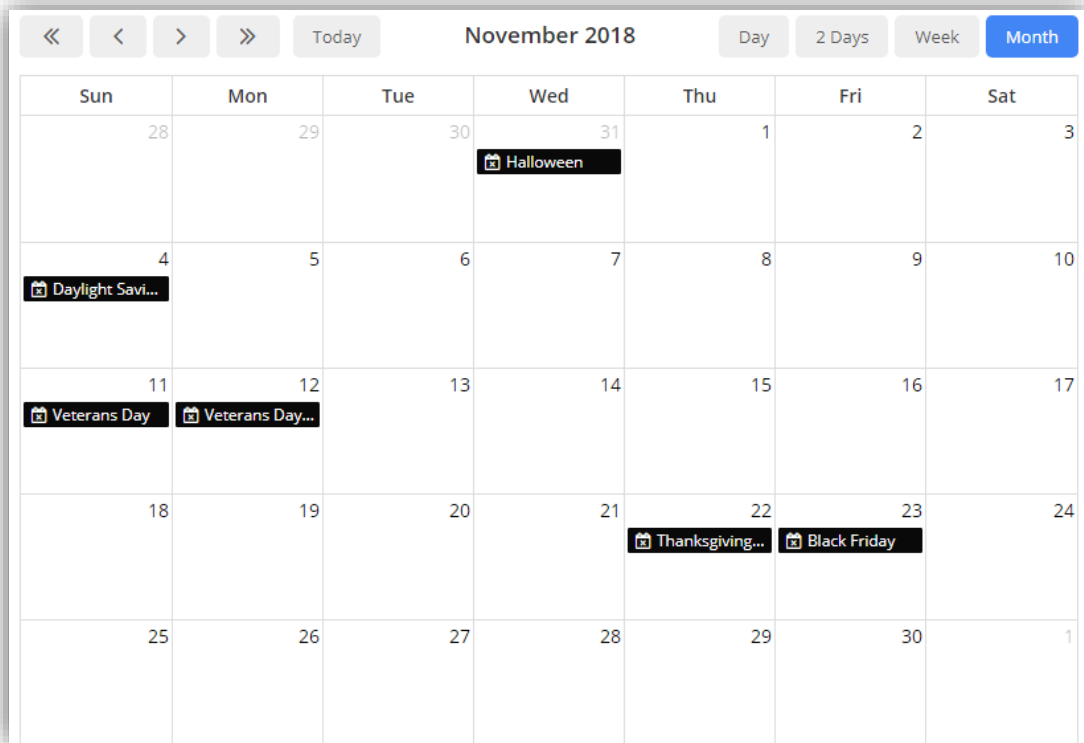
Weekends

☐ On ☒ Off

Holidays

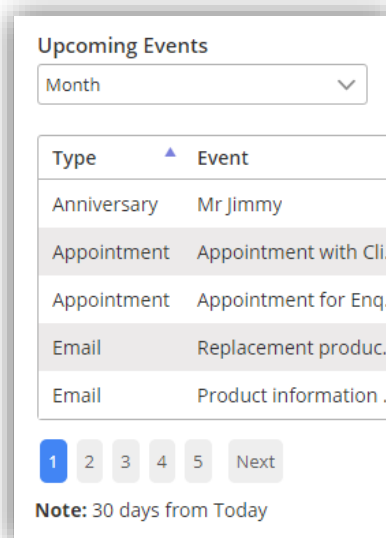
☒ ☐ On ☐ Off

- By checking the checkbox besides **'Holidays'** section, you can view all the holidays in the calendar. You can also view the holidays in all the possible ways views of the calendar.



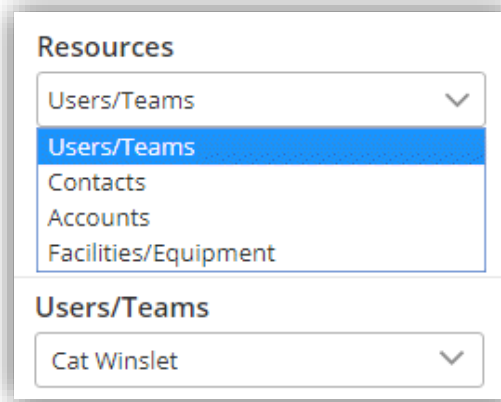
**Note:** Holidays will be displayed as per the country selected by the admin from the Default Configurations.

- To view a list of upcoming events, navigate to **'Upcoming Events'** section, from here you can select the type of view and view the upcoming events as per the Day, Week or Month format.
- Upcoming events will be displayed based on resource selected. Example: If account is the selected resource type, it displays upcoming activities related to the accounts selected.

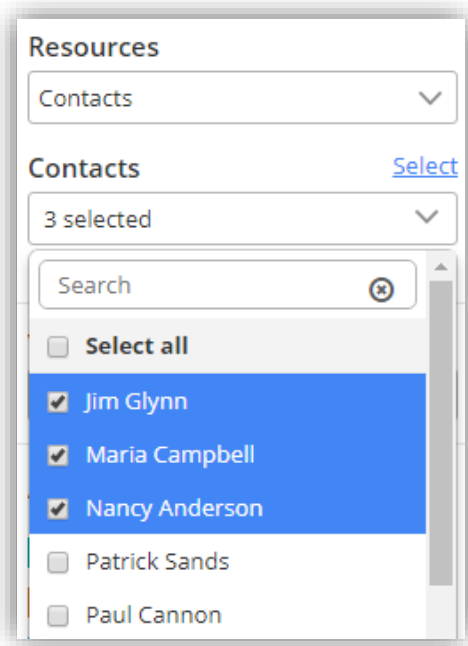


## Resources:

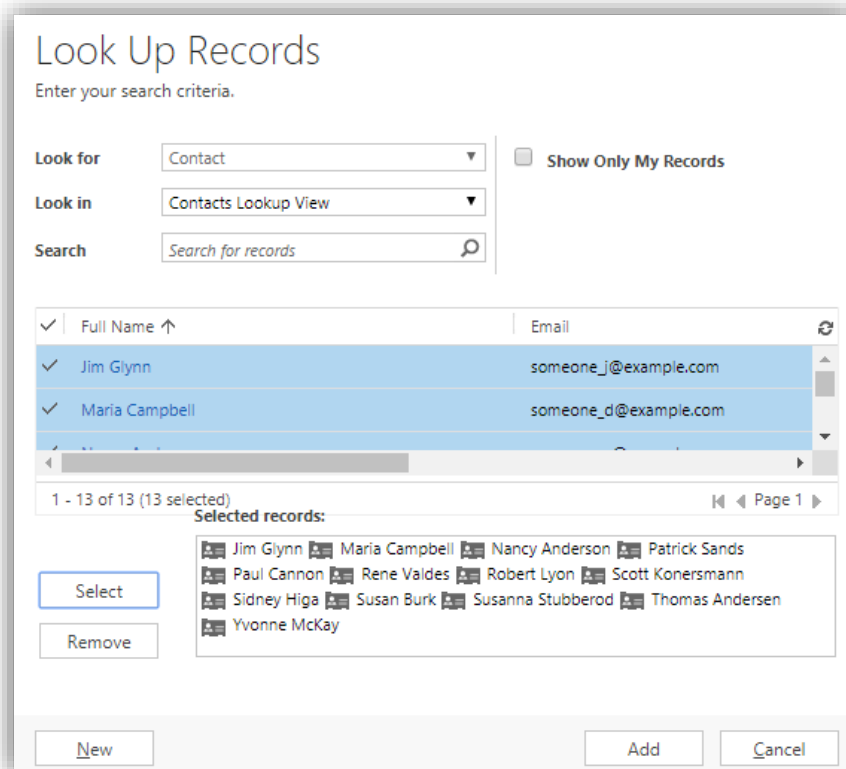
- To view the calendar of the other users, facility/equipment, accounts or contacts, navigate to **'Resources'** section on the left-hand side of the calendar and select the resource type from the list. Based on resource selection, activities in the calendar will be displayed.



- Upon selection of resource, from the other drop down, you can select users for which you need to view activities.
- If user/team option is selected as resource, it displays list of users in multiple selection dropdown.
- If facilities/equipment is selected as resource, it displays list of facility/equipment in multiple selection dropdown. Based on selected resource, activity associated with it will be displayed. On selection of this resource type, only service activity will be displayed on the calendar.
- If contact is selected as resource, it displays list of contacts in multiple selection dropdown. These are available only when contacts are selected from the dialog box.
- If account is selected as resource, it displays list of accounts in multiple selection dropdown. These are available only when accounts are selected from the lookup dialog box.



- On selection of any of the resource either account or contact, a look up dialog box will open from where you can select number of accounts or contacts. Also, on clicking the **select** button, you can edit the selection of records.

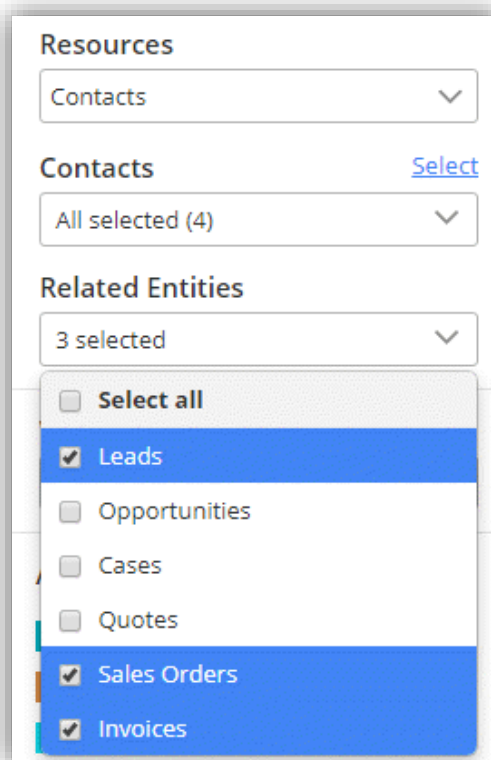


**Note:** Only the System Administrator can view the calendar along with the activities of all the users or resources. Other users can view the calendar of only their team or an individual depending on their respective role.

Activities that have account or contact mentioned within regarding field, those activities are viewed in calendar upon selection of that account or contact respectively.

#### **Related Entities:**

- On selecting accounts or contacts as the resource type, related entity dropdown is enabled from where user can select one or more related entity of account or contact related to which you want to view activities.

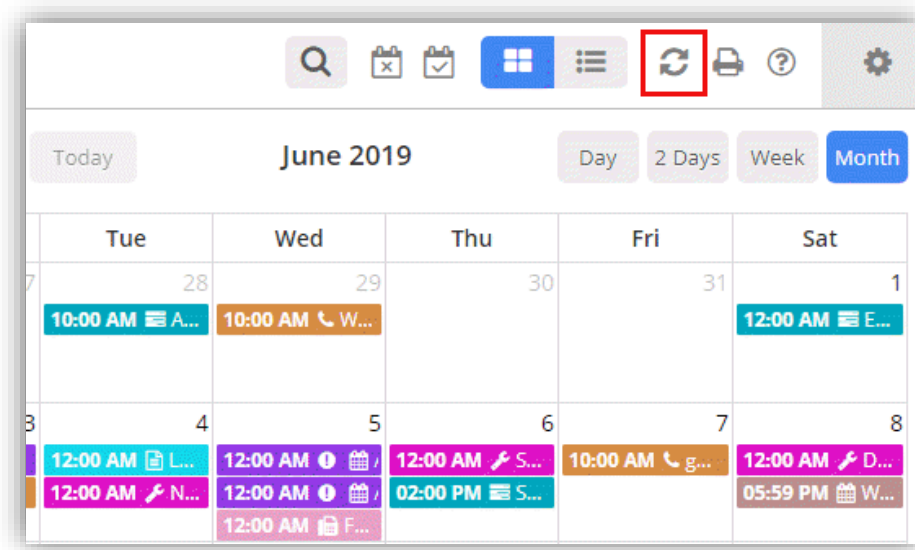


The screenshot shows a user interface for selecting resources and related entities. It features three main sections: 'Resources', 'Contacts', and 'Related Entities'. The 'Resources' section has a dropdown menu currently showing 'Contacts'. The 'Contacts' section has a dropdown menu showing 'All selected (4)' and a blue 'Select' link. The 'Related Entities' section has a dropdown menu showing '3 selected'. Below this, a list of related entities is displayed with checkboxes: 'Select all' (unchecked), 'Leads' (checked), 'Opportunities' (unchecked), 'Cases' (unchecked), 'Quotes' (unchecked), 'Sales Orders' (checked), and 'Invoices' (checked). The 'Leads', 'Sales Orders', and 'Invoices' items are highlighted with a blue background.

**Note:** Related entities dropdown will be shown only if entities are selected from the configurations page. And activities will be shown if these related entities have activities created within their record.

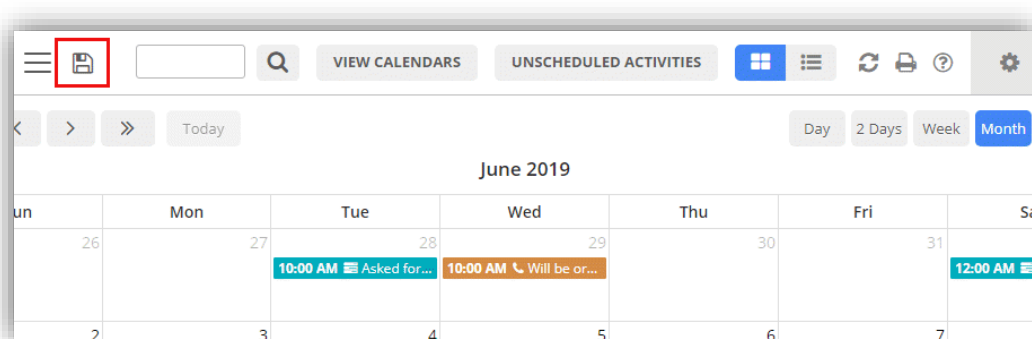
## Refresh:

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



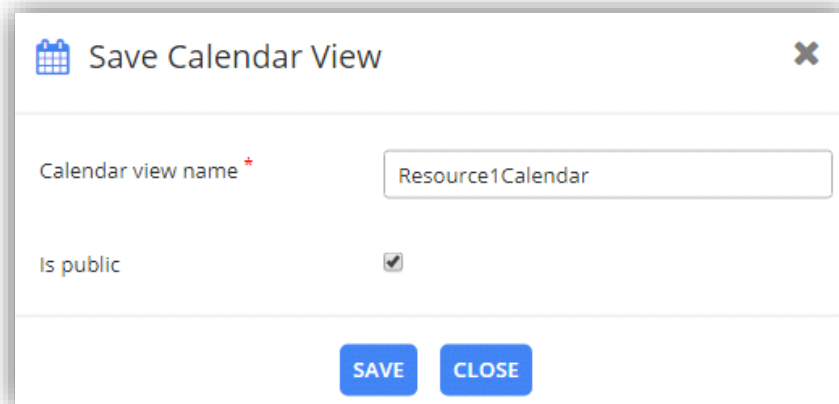
## Save and Share Calendar Views:

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



- After you click on 'Save' icon, a dialog box opens up, where you need to define the calendar view. Along with naming, you can define if it's public or private. By default, **'Is Public'** check box is

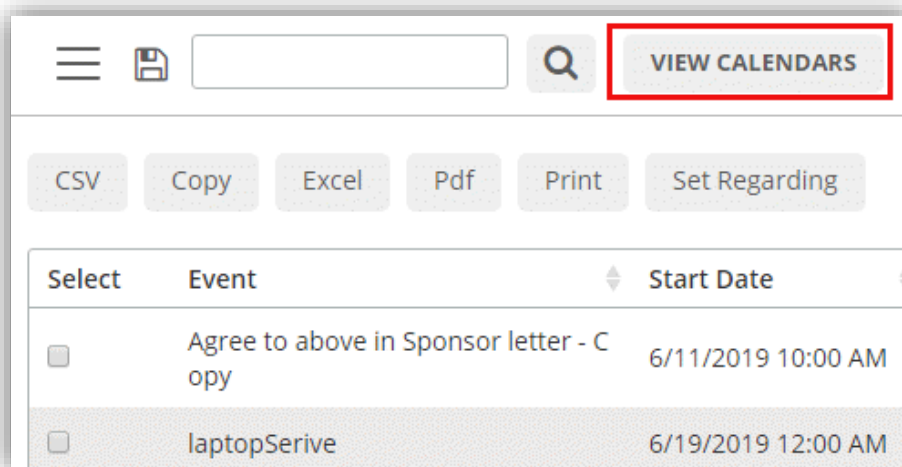
checked. If calendar is public, it is visible to all CRM users with AppJetty Calendar role under shared calendars section.



The dialog box titled "Save Calendar View" contains the following fields and controls:

- Calendar view name \***: A text input field containing "Resource1 Calendar".
- Is public**: A checkbox that is checked.
- Buttons**: "SAVE" and "CLOSE" buttons at the bottom.

- Click on 'Save' button to save the calendar view.
- Users can access saved calendar views by clicking on View Calendars button on the calendar page.

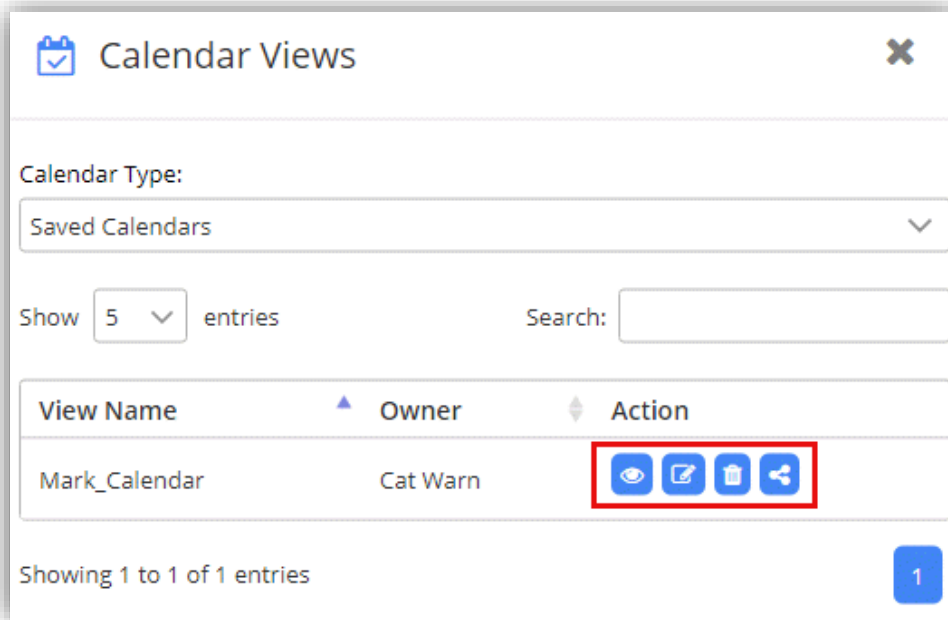


The calendar page interface includes a top navigation bar with a menu icon, a save icon, a search bar, and a "VIEW CALENDARS" button highlighted with a red box. Below the navigation bar are buttons for "CSV", "Copy", "Excel", "Pdf", "Print", and "Set Regarding". The main content area displays a table of calendar events:

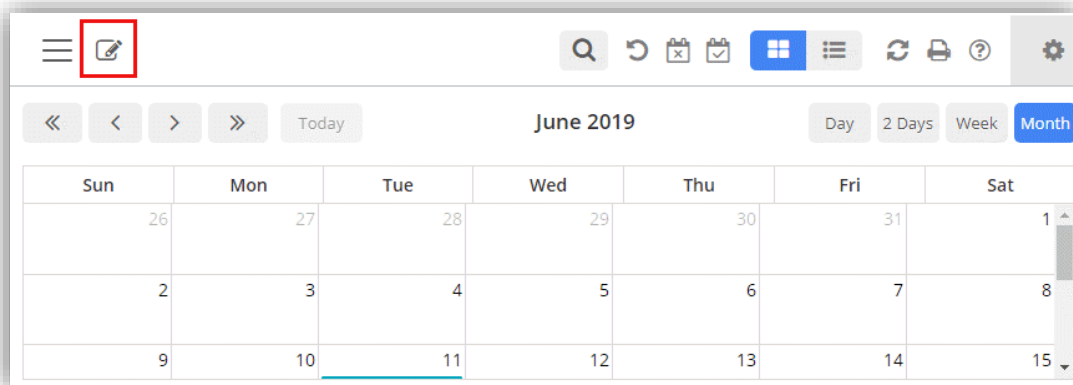
Select	Event	Start Date
<input type="checkbox"/>	Agree to above in Sponsor letter - Copy	6/11/2019 10:00 AM
<input type="checkbox"/>	laptopService	6/19/2019 12:00 AM

- After you click on View Calendars, a dialog box opens up with dropdown to select calendar type. Calendar type is the Saved Calendars and Shared Calendars. Saved calendars are the one which you have created and saved while shared calendars are the one that are shared with you by other users or the calendars that are made public by other users.
- Based on calendar type selection, you get list of calendars.

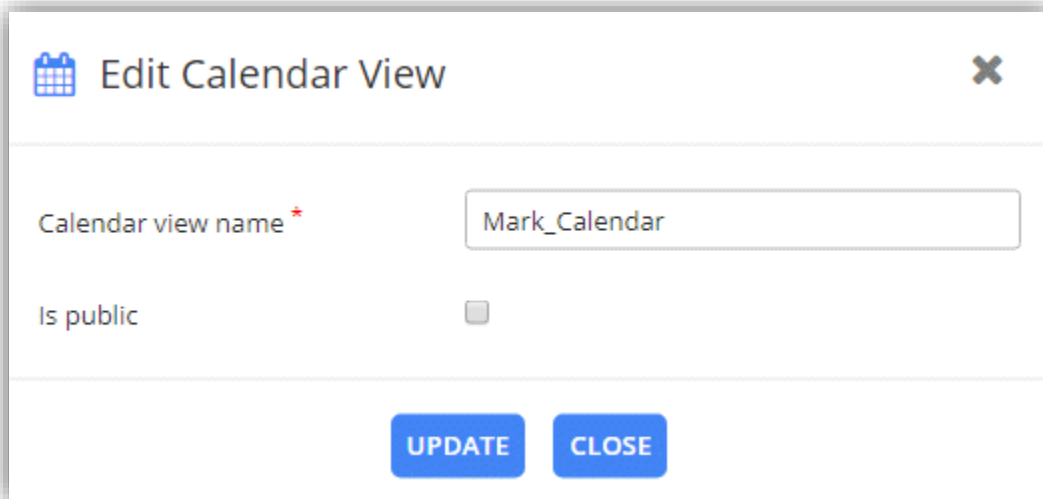




- For saved calendar and being the owner of that calendar, you can view, edit, delete and share calendar. Share option is available only when calendar is private. Also, different actions are available only when you are the owner of the calendar, else it just shows the preview icon.
- Clicking on edit calendar, particular saved calendar opens so as to edit it as required and along with that shows update calendar view icon to update calendar.

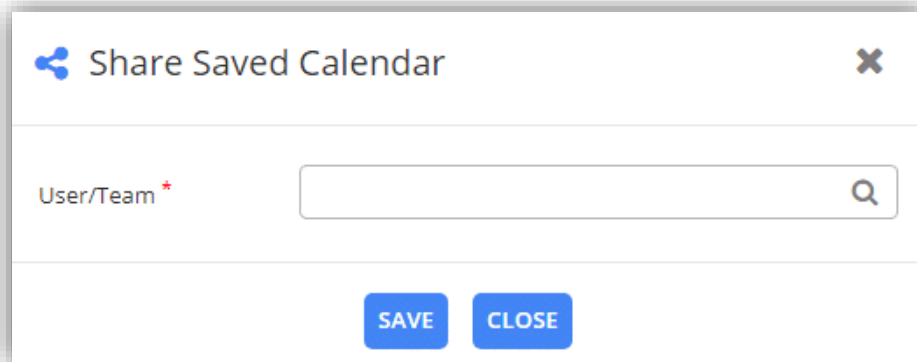


- On clicking update icon, you get to update calendar name and select if calendar is public or private.



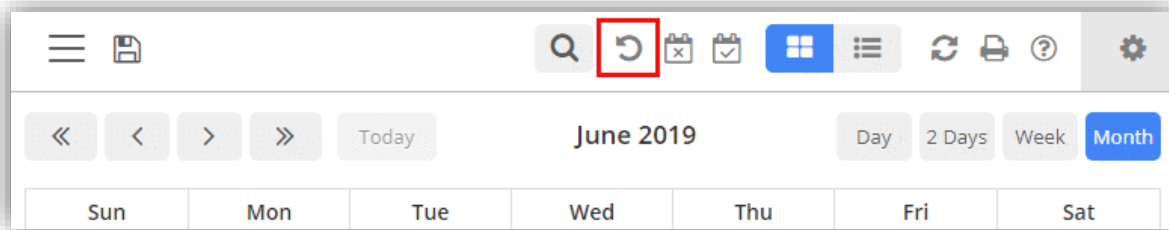
The 'Edit Calendar View' dialog box features a calendar icon and a close button (X) in the top right corner. It contains two input fields: 'Calendar view name' with a red asterisk and a text box containing 'Mark\_Calendar', and 'Is public' with an unchecked checkbox. At the bottom, there are two blue buttons labeled 'UPDATE' and 'CLOSE'.

- Click on update button to update the changes made in calendar.
- Clicking on shared calendar option, you can share calendar with other CRM users or team.



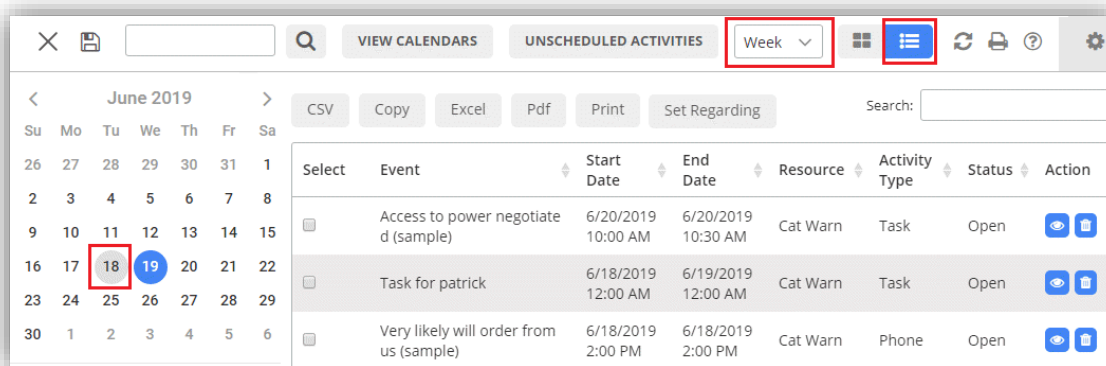
The 'Share Saved Calendar' dialog box includes a share icon and a close button (X) in the top right corner. It has a 'User/Team' label with a red asterisk, followed by a search input field with a magnifying glass icon. At the bottom, there are two blue buttons labeled 'SAVE' and 'CLOSE'.

- Clicking on Share option, opens dialog box to select user or team from the look up records box. After selecting user, click on save button to complete the calendar sharing. You can select multiple users and teams to share calendar with.
- Users can even search for specific calendar based on string entered.
- As and when saved calendar is previewed, it enables button to go back to the current view.

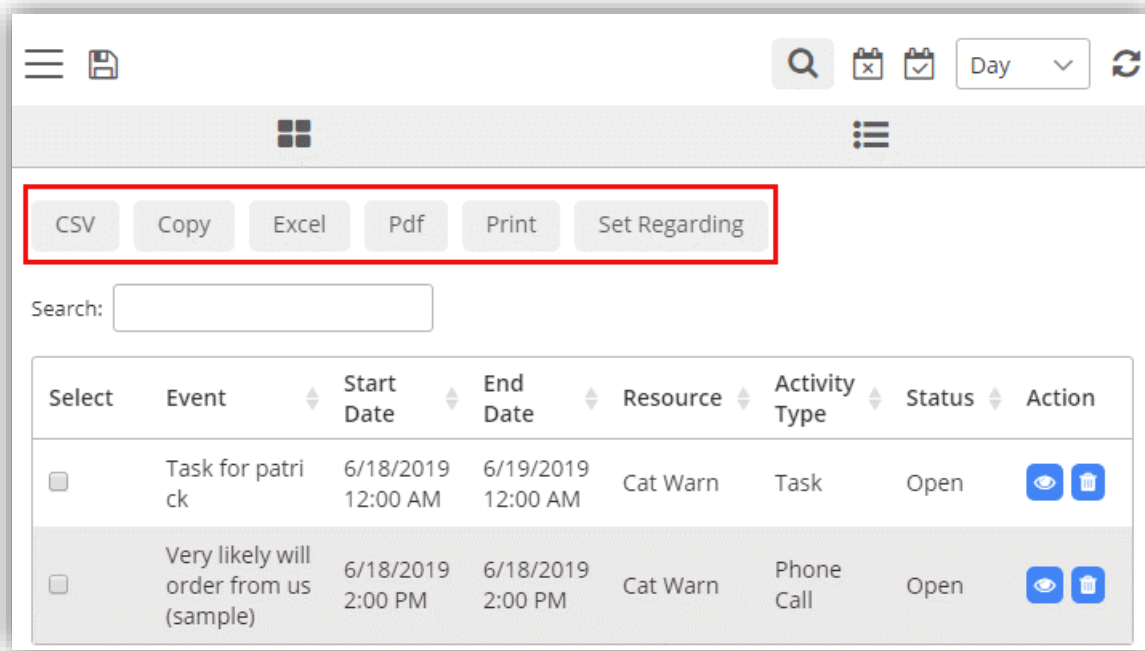


### Activity Grid View of Calendar:

- To get list view of all activities, navigate to list button on the calendar and along with that select time span from Day, Month or Year from the dropdown.



- List view works on small calendar available on left side of the calendar. It shows list of events based on day selected in the smaller calendar.
- For week time span, it shows list of events that fall under the week in which the selected day is part of.
- For month time span, it displays events of months to which the selected day is part of.
- From list view, you can perform multiple actions like exporting records to CSV, copying records, exporting records to excel, exporting records to PDF, printing records and set regarding for the selected records.



- To set regarding for the records, select the records and click on set regarding button. This opens set regarding record dialog box to select record from the look up dialog box.

The 'Set Regarding Record' dialog box is shown. It has a title bar with a blue icon and a close button. The main content area says 'Choose a regarding field for the selected activities.' Below this is a text input field labeled 'Regarding \*' with a search icon. At the bottom, there are two buttons: 'SAVE' and 'CLOSE'.

- Click on save button to set regarding for the record.

# Calendar Activities

## Create a Custom Activity:

- To create a custom activity, navigate to Default Configurations by clicking on '**Configurations**' button.
- Click on '**Custom Activity**' tab under '**Activities**' section.

The screenshot shows the 'Activities' configuration window. At the top, there's a header 'Activities'. Below it, a row of buttons includes 'Task', 'Fax', 'Phone Call', 'Email', 'Letter', and 'Appointment'. Another row of buttons includes 'Recurring Appointment', 'Service Activity', 'Campaign Activity', and 'Custom Activity' (which is highlighted). Below these buttons is a table with two columns: 'Activity Name' and 'Actions'. The table has one row with 'Birthday' in the 'Activity Name' column and two icons (edit and delete) in the 'Actions' column. Below the table, it says 'Showing 1 to 1 of 1 entries'. At the bottom left is a blue 'New' button. At the bottom right are 'Previous', '1' (in a blue box), and 'Next' buttons.



- Now click on '**New**' button to create a custom activity. Thereafter, following fields will appear under Custom Activity tab:
  - Type Name:** Enter the name of the Custom Activity.
  - Active:** Check the Checkbox to display the activity in the calendar by default.
  - Default Color:** Select the default color for the activity to be displayed in the calendar.
  - Overwrite Priority Color:** You can set the color for the activity as per the priority of the activity. There will be High, Medium, and Low priority for the activity also the color set as per the priority will overwrite the default color of the activity.
  - Tooltip Attribute:** You can select the tooltip attributes to be included in activity tooltip on hover by checking the checkbox besides the attributes.
  - Details Attribute:** You can select the detail attributes to be included in activity details by checking the checkbox besides the attributes.

- **Email Reminder:** Enable email reminder for an activity.
- **Minutes:** Set the minutes before which you want email to be sent.
- **Button Configuration:** Check the actions that you want on the calendar activity.
- **Save:** Click on 'Save' button to save the activity.

**Activity Name**

**Actions**

Birthday

Showing 1 to 1 of 1 entries

Previous

1

Next


Type Name \*

Active

☒

Default Color

#178d1e



☐ High

Overwrite Priority Color

☐ Normal

☐ Low

Tooltip Attribute

5 selected

Details Attribute

5 selected

Email Reminder

☐ On ☒ Off

Minutes

0

Buttons Configuration

☒ Convert To Opportunity
 ☒ Convert To Case

☐ Mark As Complete
 ☐ Mark As Close

New

Save

- You can edit and delete the Custom activities you have created.

## Create an Activity:

- To create activities, click on the calendar, '**Create Activity**' popup will appear on your screen. It will contain following fields:

**Create Activity**

Activity: Task

Subject \*: Preparing FSD document

Regarding: Litware, Inc.

Start Date \*: 11-13-2018 12:00 AM

End Date \*: 11-14-2018 12:00 AM

Priority: Normal

Description: Prepare document related to project

Owner: Kevin Peterson

OK

- **Activity:** Select the type of activity you want to create.

**Create Activity**

Activity: Task

Subject \*:

Regarding:

Start Date \*:

End Date \*:

Activity options:

- Task
- Fax
- Phone Call
- Email
- Letter
- Appointment
- Recurring Appointment
- Service Activity
- Campaign Activity
- Birthday**

**Note:** The type of custom activity created from the backend will be displayed in the dropdown list. The attributes for creating an activity will be displayed as per the type of activity selected.

- **Subject:** Enter the subject of the activity.
- **Regarding:** Mention the contact, account, or any other record with which activity is concerned to. On selecting search button on the regarding text area, look up record dialog opens from where user can select the record with which event is related.

**Look Up Record**  
Enter your search criteria.

Look for: Account ☐ Show Only My Records

Look in: Account Lookup View

Search: Search for records

Account Name	Email
✓ Fourth Coffee	someone1@example.com
Litware, Inc.	someone2@example.com
Adventure Works	someone3@example.com
Fabrikam, Inc.	someone4@example.com
Blue Yonder Airlines	someone5@example.com
City Power & Light	someone6@example.com
Contoso Pharmaceuticals	someone7@example.com
Alpine Ski House	someone8@example.com

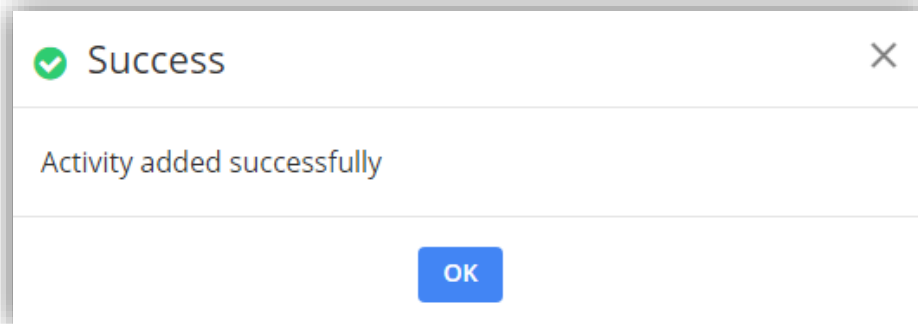
1 - 10 of 10 (1 selected) Page 1

New Add Cancel Remove Value

- **Start Time:** Set the Start Date and Time of the activity.
- **End Time:** Set the End Date and Time of the activity.
- **Priority:** Set the priority of the activity. Priority can be High, Normal, or Low.
- **Description:** Enter the description of the activity.
- **Owner:** Displays name of the owner who created the activity.



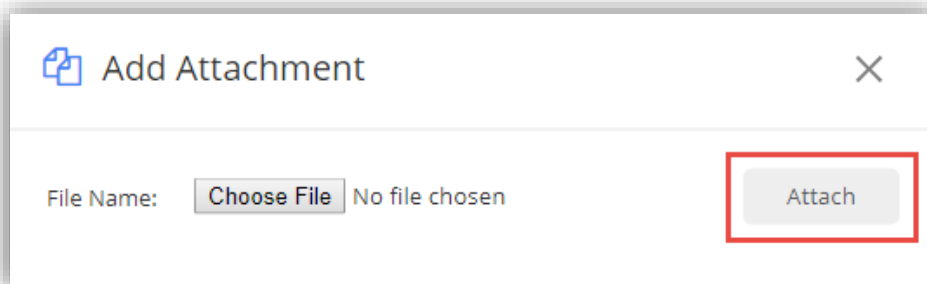
- Lastly, click on the **'OK'** button to create the Activity. By clicking on the **'OK'** button, a confirmation pop-up will appear on your screen.



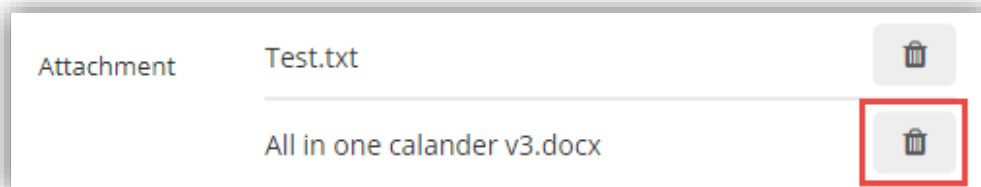
- To proceed further click on **'OK'** button. Now you can view the added activity in your calendar.

#### Attachment for Activity:

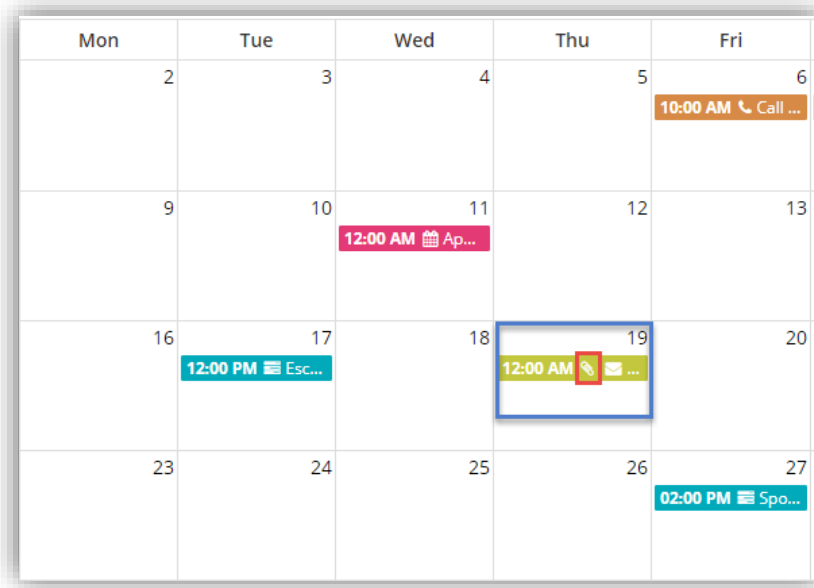
- To add an attachment for the activity, click on **'+'** button from the **'Create Activity'** pop up.
- Now choose the file to be attached as attachment and click on **'Attach'** button.



- On clicking Attach button, attachment will be shown in Create Activity dialog box along with delete icon. Clicking on Delete icon will remove that activity.



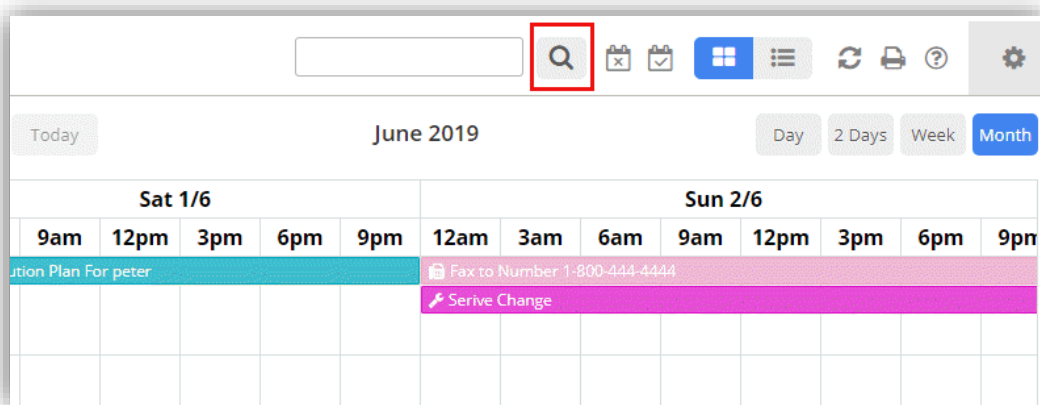
- Thereafter click on Ok to complete activity creation with attachment.
- Attachment icon will be displayed on the activities in the calendar for which the attachments were added.



**Note:** Attachments can only be added for the Email, Appointment, and Custom Activities.

### Search Activity:

- You can also search activities displayed on the calendar based on keyword entered. It searches activities based on activity subject.



- To search for an activity, simply enter the keyword in the text area provided and click on search button.
- It will result into showing all activities with that keyword in the subject.

### Recurring Appointment:

- To create recurring appointment, select activity type as recurring appointment.
- Next fill in the details as required and click on set recurrence option to set recurring details.

+
Create Activity

Activity

Recurring Appointment

Subject \*

Regarding

Required

Optional

Location

Enter a location

Set Recurrence

Priority

Normal

Description

Owner


Cat Warn

CREATE

- If location suggestions are active from the configurations page, you even get location suggestions based on keyword entered under location option.

Location	Man
	<div> <div></div> <div>Manchester UK</div> </div> <div> <div></div> <div>Mannheim Germany</div> </div> <div> <div></div> <div>Manali Himachal Pradesh, India</div> </div> <div> <div></div> <div>Manila Metro Manila, Philippines</div> </div> <div> <div></div> <div>Manesar, National Highway 48 Gurugram, Haryana, India</div> </div>


- Clicking on Set Recurrence button, fill in the required recurrence details and click on set option to save recurrence and then click on Create button to complete the recurring appointment creation.


**Set Recurrence**
✕


---

**Appointment Time**

Start


3:44 PM


End

4:14 PM


---

**Recurrence Pattern**

Weekly



Recur Every  Week(s) On:

☐ Sunday
☐ Monday
☐ Tuesday
☒ Wednesday
☐ Thursday
☐ Friday
☐ Saturday

---


**Range of Recurrence**

Start range

06-26-2019


End range

☐ No End Date
☒ End after  occurrences
☐ End by 

06-27-2019


Set

Cancel

## Share Activity:

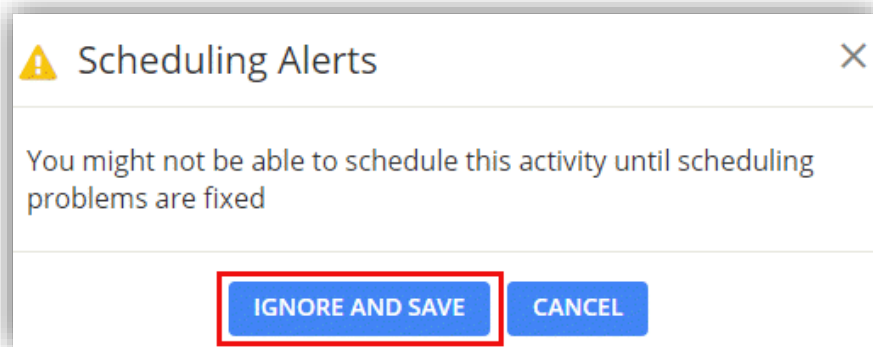
- Now you can share the activities in which the multiple resources are involved.
- While creating the activities in which multiple resources are selected, the activity will automatically be assigned to the resources and those activities will be displayed in their calendar as well.
- In appointment activity, one needs to mention required and optional users while in case of other activities it appears as from and to.

**Note:** For activity to be visible in multiple calendars, users should be selected in the look up record option.

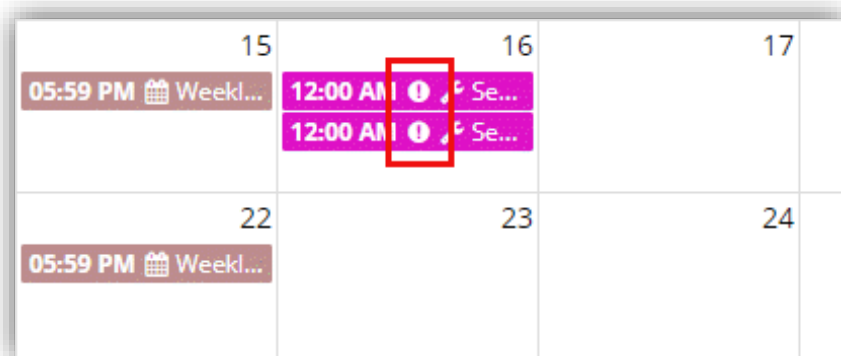
**Note:** All the activities can be shared with multiple resources except 'Task' Activity

### Conflict Management:

- On creating service activity or appointment, if scheduling of that activity conflicts with another activity it shows alerts only if enabled from the backend configurations.



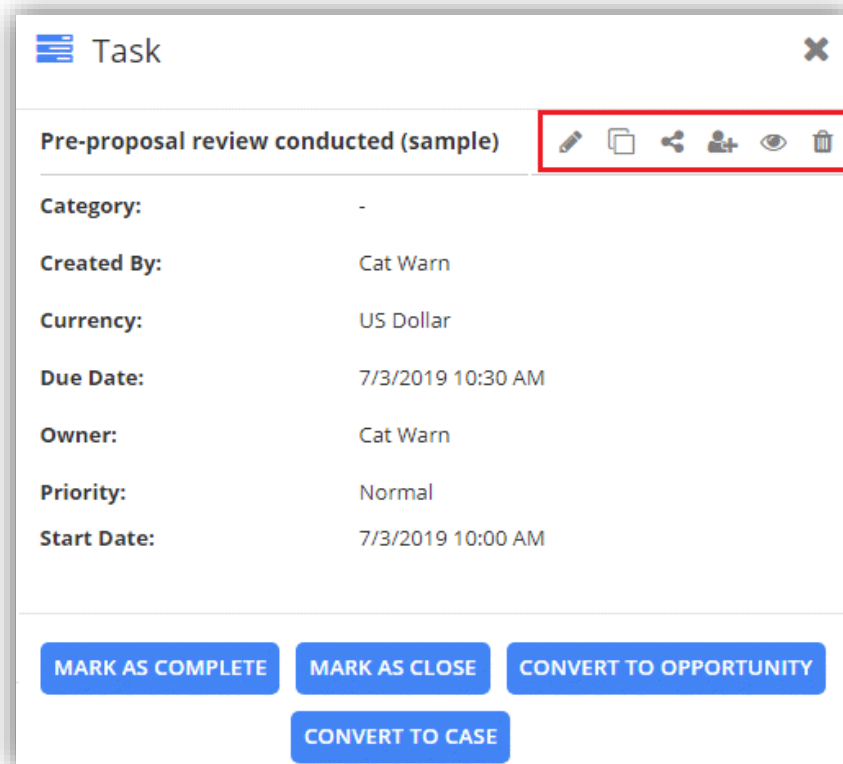
- On clicking ignore and save button, activity gets saved but with conflicting error message on the activity. Clicking cancel button, scheduling gets cancelled and you again get to re-schedule date and time of the activity.



**Note:** You get scheduling alerts only for conflicts among appointments and service activities. And it works only if conflict management is enabled from configuration page.

## View Activity:

- To view detail of any activity, simply click on activity.

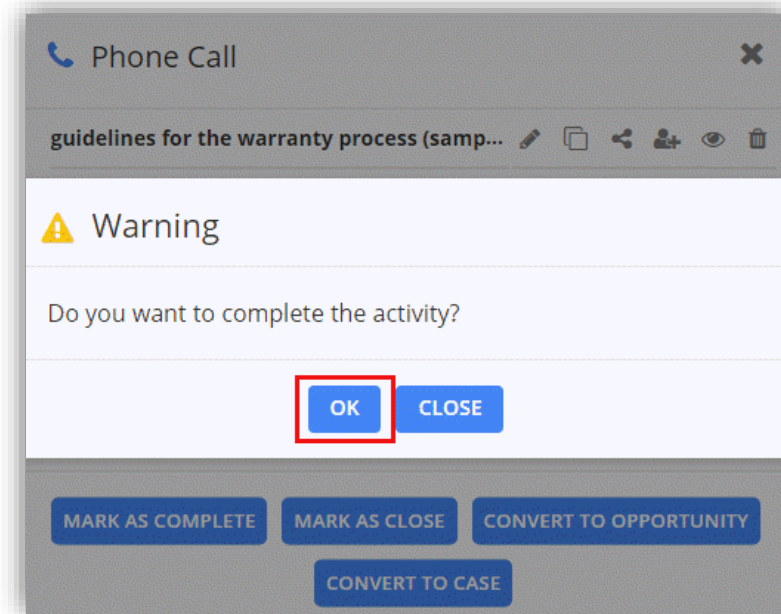


The screenshot shows a 'Task' detail dialog box. At the top, there is a title bar with a hamburger menu icon, the word 'Task', and a close button (X). Below the title bar, the task name 'Pre-proposal review conducted (sample)' is displayed. To the right of the task name is a toolbar with six icons: a pencil (edit), a document (copy), a share icon, a person with a plus sign (assign), an eye (view), and a trash can (delete). This toolbar is highlighted with a red rectangle. Below the toolbar, the task details are listed in a key-value format: Category: -, Created By: Cat Warn, Currency: US Dollar, Due Date: 7/3/2019 10:30 AM, Owner: Cat Warn, Priority: Normal, and Start Date: 7/3/2019 10:00 AM. At the bottom of the dialog, there are four blue buttons: 'MARK AS COMPLETE', 'MARK AS CLOSE', 'CONVERT TO OPPORTUNITY', and 'CONVERT TO CASE'.

- This detail dialog box contains all those fields and actions buttons that are enabled from the configurations page.
- From this detail activity dialog box, activity can be converted to opportunity, converted to case, converted to lead (Only for email activity), marked as close, marked as complete, close campaign activity (Only for campaign activity), end series (Only for recurring appointment).
- User can also perform multiple actions such as editing the activity, copying activity, sharing an activity to other user via email, re-assign activity to other user or team, view activity in CRM, and delete that activity.

## Mark as Complete

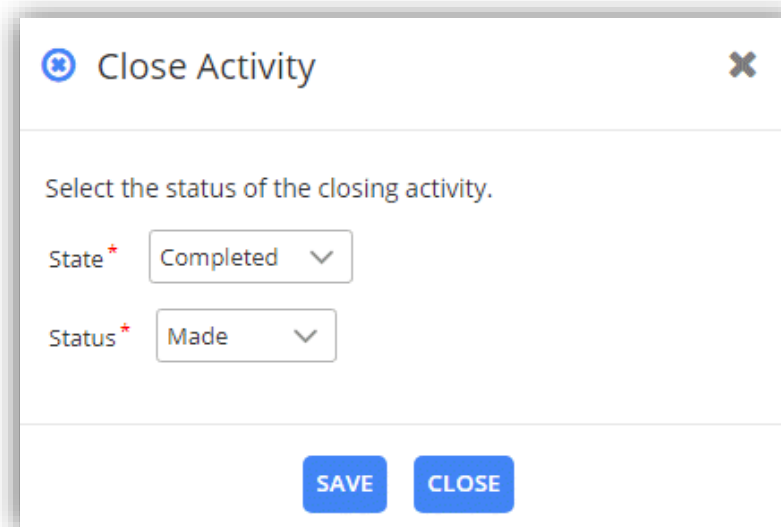
- You can directly complete an activity from calendar itself by clicking on Mark as Complete button. On clicking this button, warning message appears. Click “Ok” to continue.



- On clicking Ok, particular activity gets completed and gets removed from the calendar and its status gets updated as completed.

## Mark as Close

- On clicking Mark as Close for an activity, it shows dialog box where state and status of the closing activity is to be selected.



- After that, click on save button. Upon saving, particular activity gets removed from the calendar and its status is updated as closed in the CRM.



## Convert Activity to Opportunity

- Activities like Tasks, Phone calls, Letters, Fax, Custom Activities and Emails can be converted to opportunity from calendar directly.

**Convert to Opportunity**

Customer \* Fourth Coffee (sam...) Q

Currency \* US Dollar Q

Related Campaign Q

Open the new opportunity ☒ Yes ☐ No

Change the status to completed and close the form ☒ Yes ☐ No

Record a closed campaign response ☐ Yes ☒ No

**CONVERT** **CLOSE**

## Convert Activity to Case

- Activities like Tasks, Phone calls, Letters, Fax, Custom Activities and Emails can be converted to case from calendar directly.

**Convert to Case**

Customer \* Fourth Coffee (sam...) Q

Subject Q

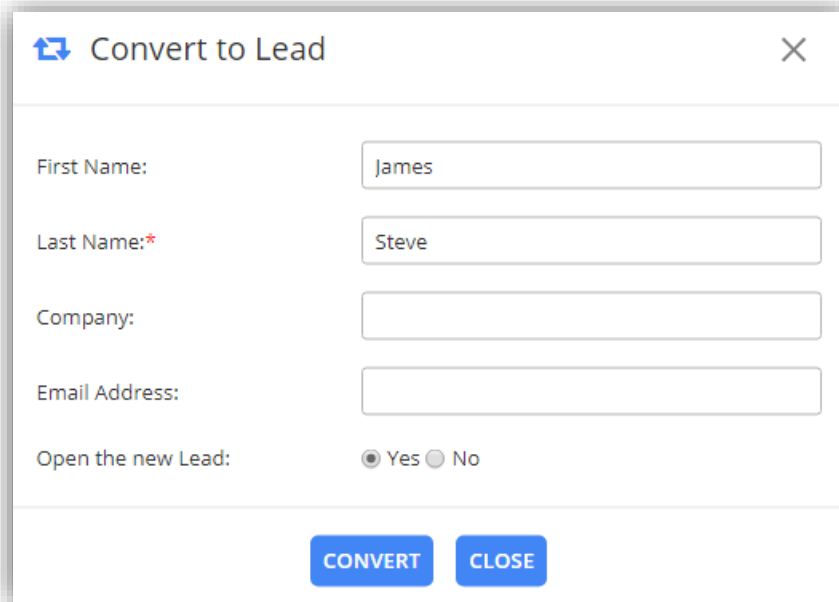
Open the new case ☒ Yes ☐ No

Change the status to completed and close the form ☒ Yes ☐ No

**CONVERT** **CLOSE**

## Convert Activity to Lead

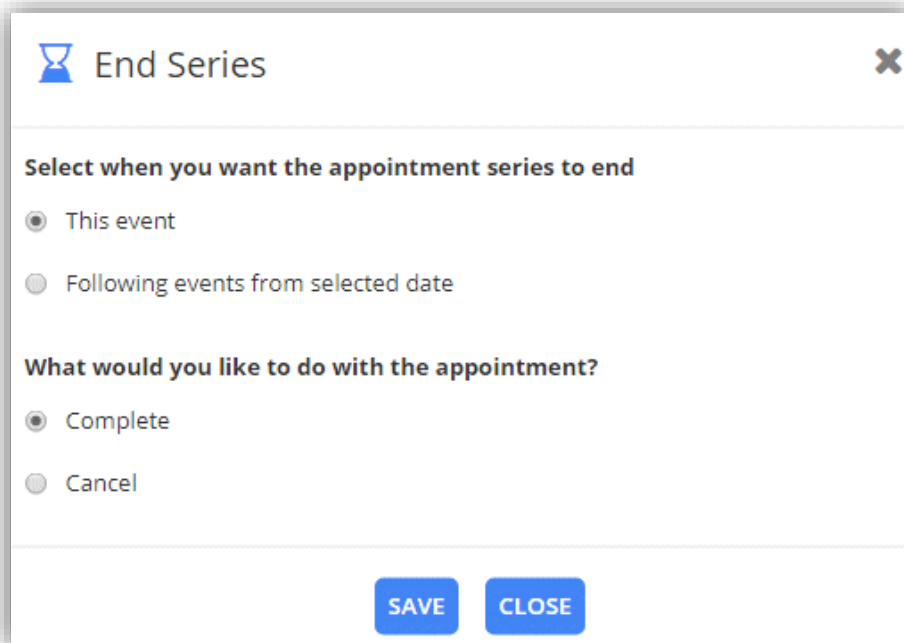
- Only email activities can be converted to lead.



The 'Convert to Lead' dialog box features a title bar with a blue double-arrow icon and a close button (X). The main area contains five input fields: 'First Name' (pre-filled with 'James'), 'Last Name' (pre-filled with 'Steve', marked with a red asterisk), 'Company', 'Email Address', and a radio button selection for 'Open the new Lead' (pre-selected 'Yes'). At the bottom are two blue buttons: 'CONVERT' and 'CLOSE'.

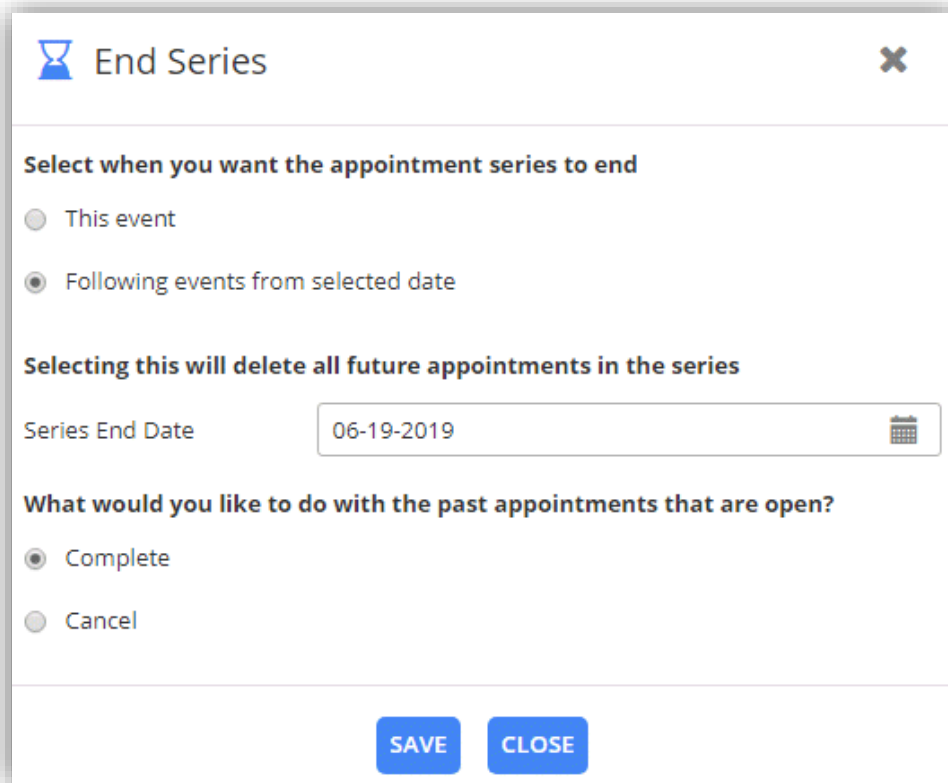
## End Series

- End series option is available in case of recurring appointment. On clicking end series button, you need to select when you want appointment series to end. It can be either “This event” or “Following events from selected date”.



The 'End Series' dialog box has a title bar with a blue hourglass icon and a close button (X). The content is divided into two sections. The first section, 'Select when you want the appointment series to end', has two radio button options: 'This event' (selected) and 'Following events from selected date'. The second section, 'What would you like to do with the appointment?', has two radio button options: 'Complete' (selected) and 'Cancel'. At the bottom are two blue buttons: 'SAVE' and 'CLOSE'.

- If “This event” option is selected, it ends that appointment while selecting “Following events from selected date” option, you need to select series end date.



The image shows a dialog box titled "End Series" with a close button (X) in the top right corner. The dialog contains the following sections:

- Select when you want the appointment series to end**
  - ☐ This event
  - ☒ Following events from selected date
- Selecting this will delete all future appointments in the series**
  - Series End Date: 06-19-2019 (with a calendar icon for date selection)
- What would you like to do with the past appointments that are open?**
  - ☒ Complete
  - ☐ Cancel

At the bottom of the dialog are two blue buttons: "SAVE" and "CLOSE".

- Along with ending series, you can either complete or cancel an appointment.

## Edit Activity:

- Click on edit activity icon to edit any created activity. On clicking edit activity, it opens activity details in edit view.

Update Activity

Activity Phone Call

Subject \*

Regarding

Start Date \*

End Date \*

Direction Outgoing

From \* Fourth Coffee (sam...)

To \* Litware, Inc. (sample)

Phone Number

**UPDATE**

- Click on Update button to save changes to the activity.

## Copy Activity:

- Click on copy activity icon, to copy activity details. Clicking on copy icon you can edit all the details if required.

Copy Activity

Activity

Service Activity

Subject \*

ServiceAct1

Service \*

Service 01

Regarding

Customers

Resources

Start Date \*

07-16-2019 12:00 AM

End Date \*

07-17-2019 12:00 AM

Location

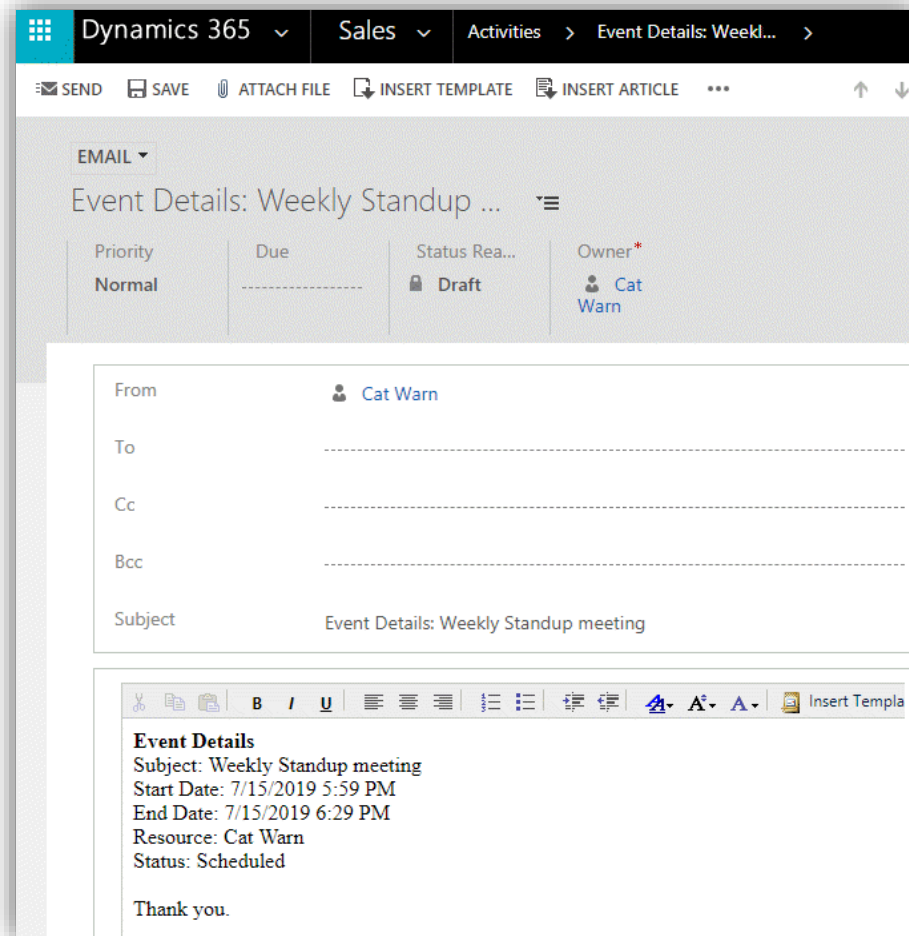
Enter a location

CREATE

- Click on Create button to complete the activity creation. If you don't edit and save it as it is, it would create a duplicate of the activity.

## Share Activity:

- If activity is to be shared to other users via email, click on share icon available in the activity detail pop up.



**Dynamics 365** Sales Activities > Event Details: Weekl... >

SEND SAVE ATTACH FILE INSERT TEMPLATE INSERT ARTICLE

EMAIL

Event Details: Weekly Standup ...

Priority	Due	Status Rea...	Owner*
Normal	-----	Draft	Cat Warn

From Cat Warn

To -----

Cc -----

Bcc -----

Subject Event Details: Weekly Standup meeting

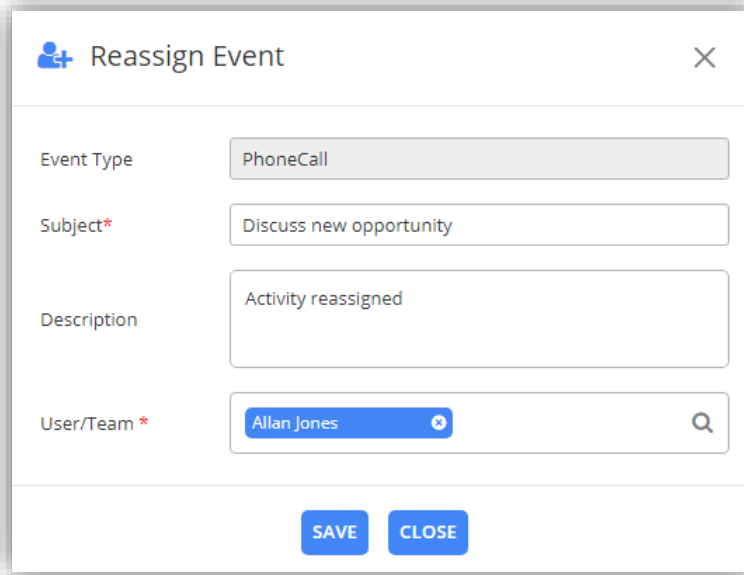
**Event Details**  
 Subject: Weekly Standup meeting  
 Start Date: 7/15/2019 5:59 PM  
 End Date: 7/15/2019 6:29 PM  
 Resource: Cat Warn  
 Status: Scheduled

Thank you.

- Clicking on icon, it redirects to CRM page to email the activity details.

## Re-assigning Activity:

- To reassign activity, click on activity. It opens a dialog box. Click on '👤'.



The 'Reassign Event' dialog box contains the following fields:

- Event Type:** PhoneCall
- Subject\*:** Discuss new opportunity
- Description:** Activity reassigned
- User/Team\*:** Allan Jones (with a dropdown arrow and a search icon)

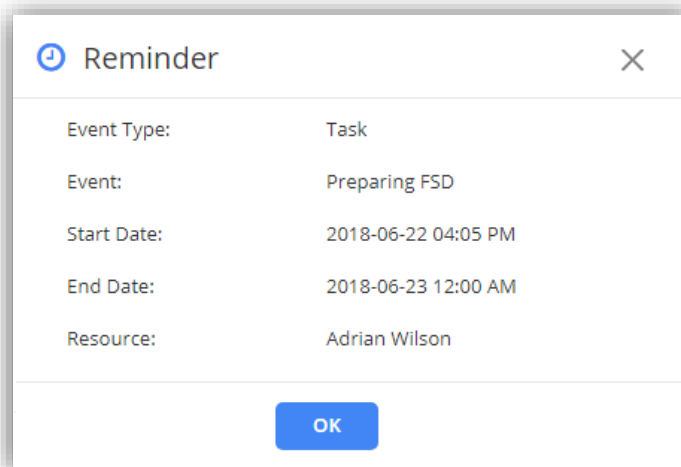
At the bottom are two buttons: **SAVE** and **CLOSE**.

- Select the user or team from look up records box to which the activity is to be reassigned.

**Note:** To reassign any activity to any user or team, they should have roles defined or else it will prompt error message.

## Reminder of Activity:

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



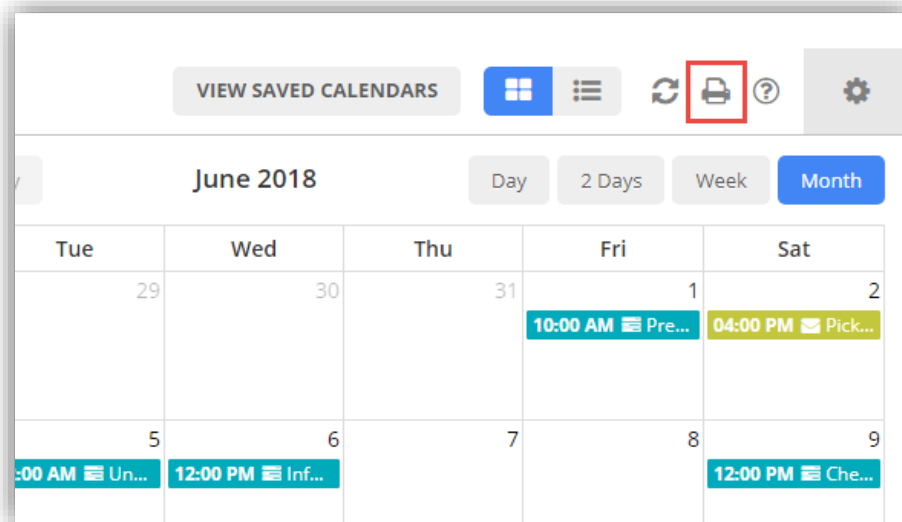
The 'Reminder' dialog box displays the following information:

- Event Type:** Task
- Event:** Preparing FSD
- Start Date:** 2018-06-22 04:05 PM
- End Date:** 2018-06-23 12:00 AM
- Resource:** Adrian Wilson

At the bottom is an **OK** button.

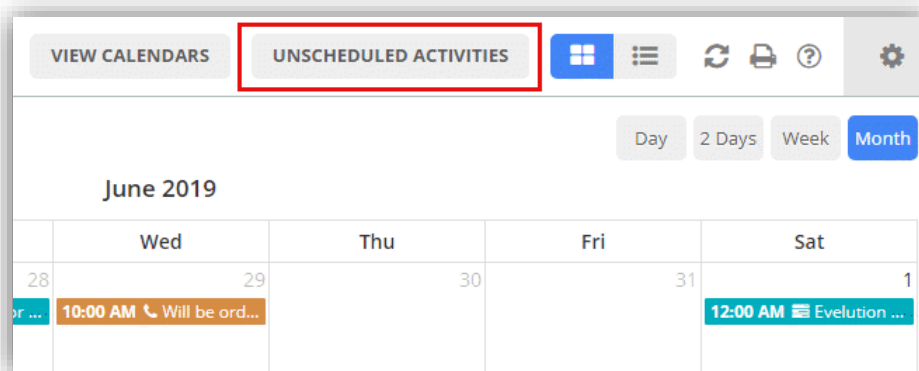
## Print Calendar:

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



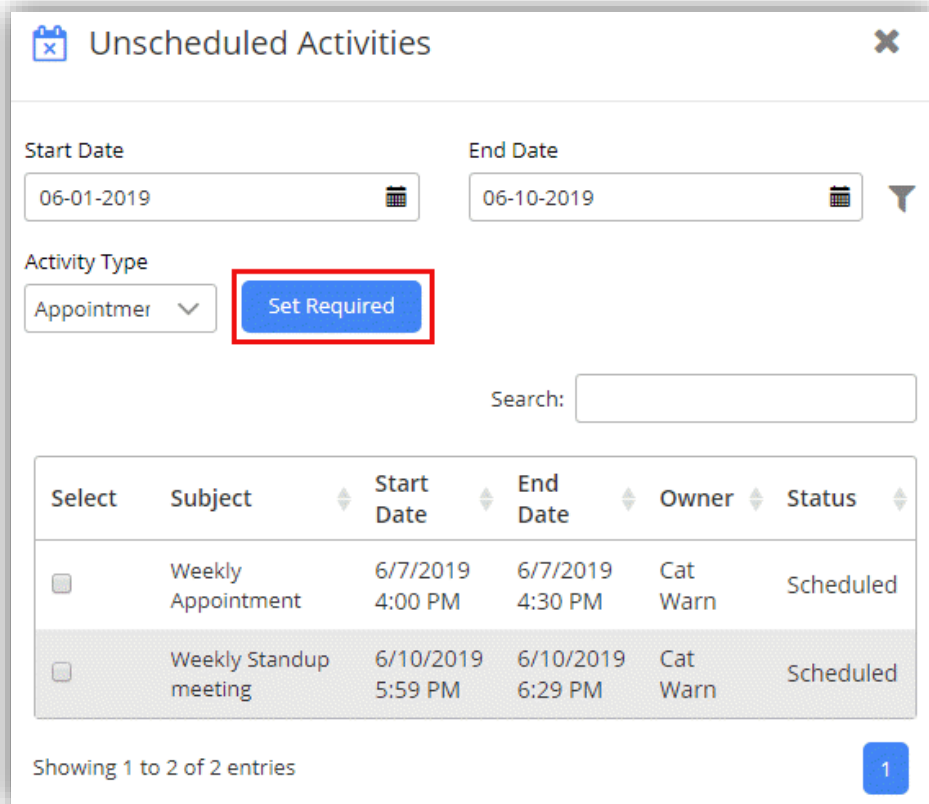
## Unscheduled Activities:

- To manage unscheduled activities, click on **Unscheduled Activities** button.



- It opens dialog box with list of unscheduled activities. This list comprises of two activities based on activity type selected. Start and End date filters to filter activities along with search box to search activities.
- If activity type is appointment, it shows all the appointments that don't have any required attendees assigned.





**Unscheduled Activities**

Start Date: 06-01-2019 End Date: 06-10-2019

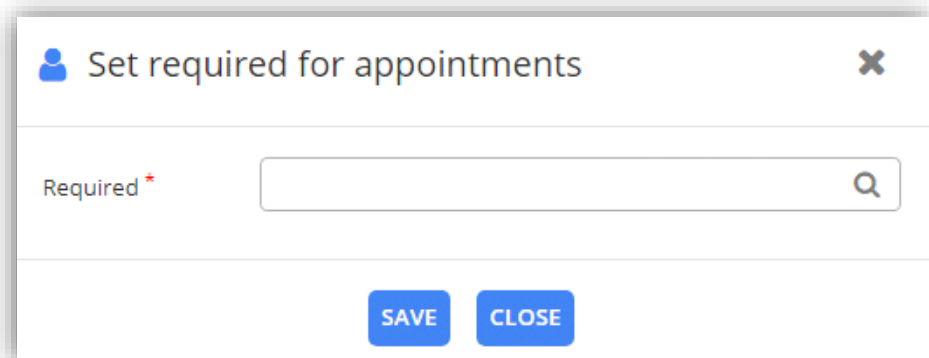
Activity Type: Appointmentmer **Set Required**

Search:

Select	Subject	Start Date	End Date	Owner	Status
<input type="checkbox"/>	Weekly Appointment	6/7/2019 4:00 PM	6/7/2019 4:30 PM	Cat Warn	Scheduled
<input type="checkbox"/>	Weekly Standup meeting	6/10/2019 5:59 PM	6/10/2019 6:29 PM	Cat Warn	Scheduled

Showing 1 to 2 of 2 entries

- To assign attendees to an appointment, select appointment as the activity type from the dropdown and click on 'Set Required' button.
- Clicking on Set Required button, it will open dialog box to select required attendee. Select the attendee as required and click on Save button.



**Set required for appointments**

Required <sup>\*</sup>

**SAVE** **CLOSE**

- Upon saving, attendees get assigned and that activity gets removed from the list of unscheduled activities.

- If activity type is service activity, it shows all the service activities that don't have resources assigned.

**Unscheduled Activities**

Start Date: 07-01-2019 End Date: 07-31-2019

Activity Type: Service **Set Resource**

Search:

Select	Subject	Start Date	End Date	Owner	Status
<input type="checkbox"/>	123	7/4/2019 12:00 AM	7/6/2019 12:00 AM	Cat Warn	Scheduled

Showing 1 to 1 of 1 entries

- To assign resources to the service activity, select service activity as the activity type from the dropdown and click on 'Set Resource' button.
- Clicking on Set Resource button, it will open dialog box to select required resources. Select them as required and click on Save button.

**Set resource for service activities**

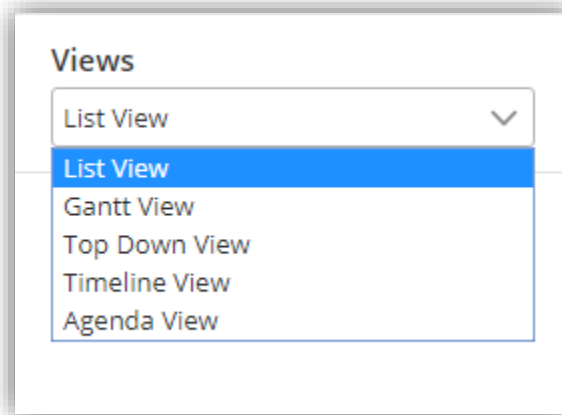
Resource \*

SAVE CLOSE

- Upon saving, resources get assigned and that activity gets removed from the list of unscheduled activities.

## Calendar Views

- To view Calendar 365 in multiple views, navigate to **'Views'** dropdown list on the left side of the calendar.



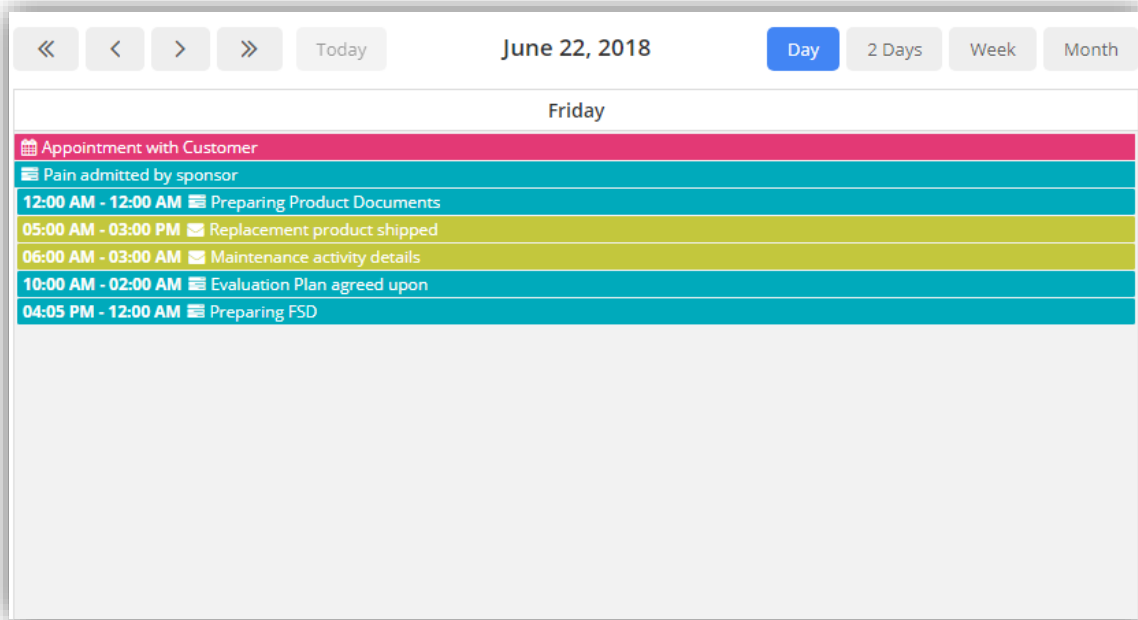
- There are five types of views of Calendar 365 and they are as follows:
  - List View
  - Gantt View
  - Top Down View
  - Timeline View
  - Agenda View

### List View

- This view provides you a complete list of the activities sorted by date and time. In addition, you can also view the calendar in the list view as per the Day, Day Span, Week and Month format.

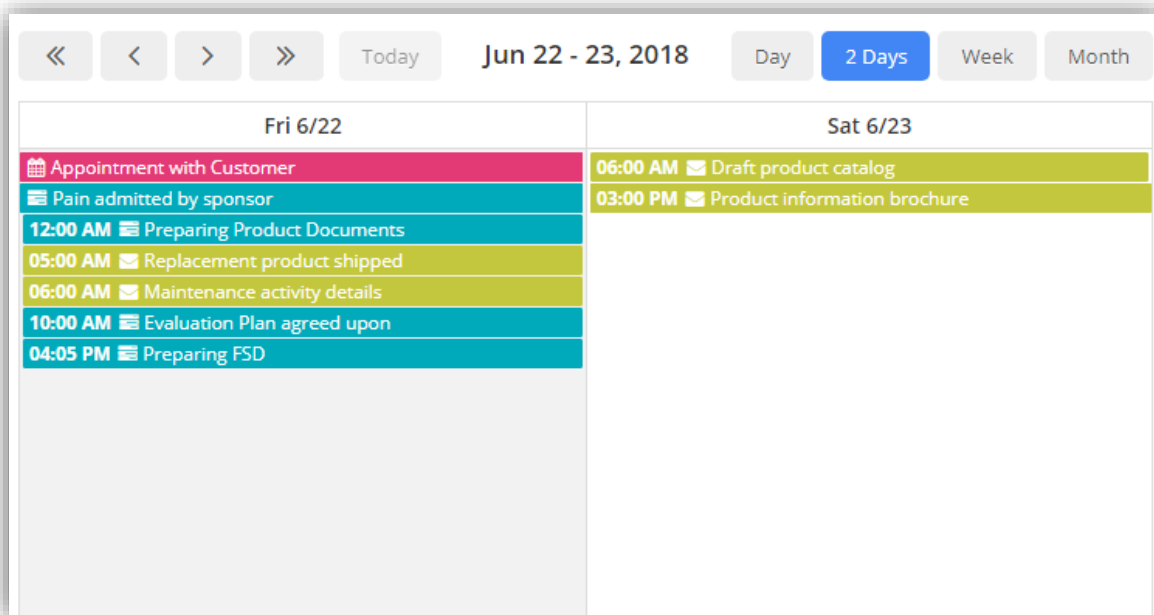
#### Day View:

- You can see the activities for the day in the List View.



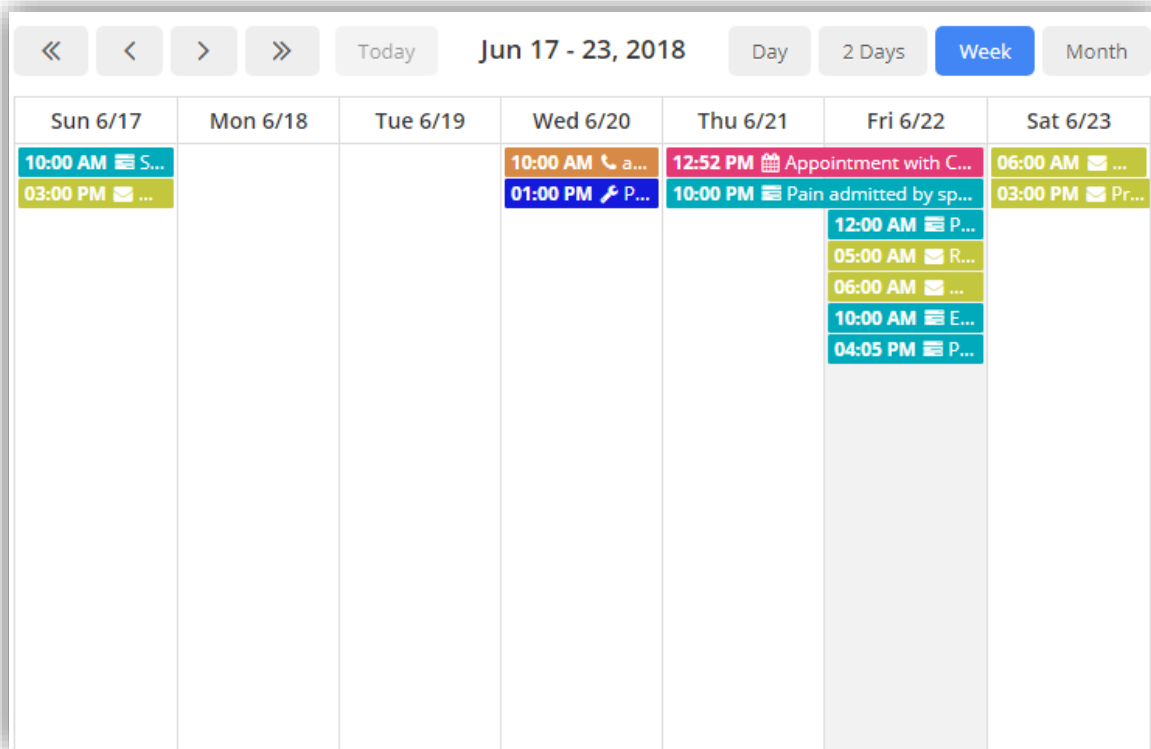
### Day Span View:

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



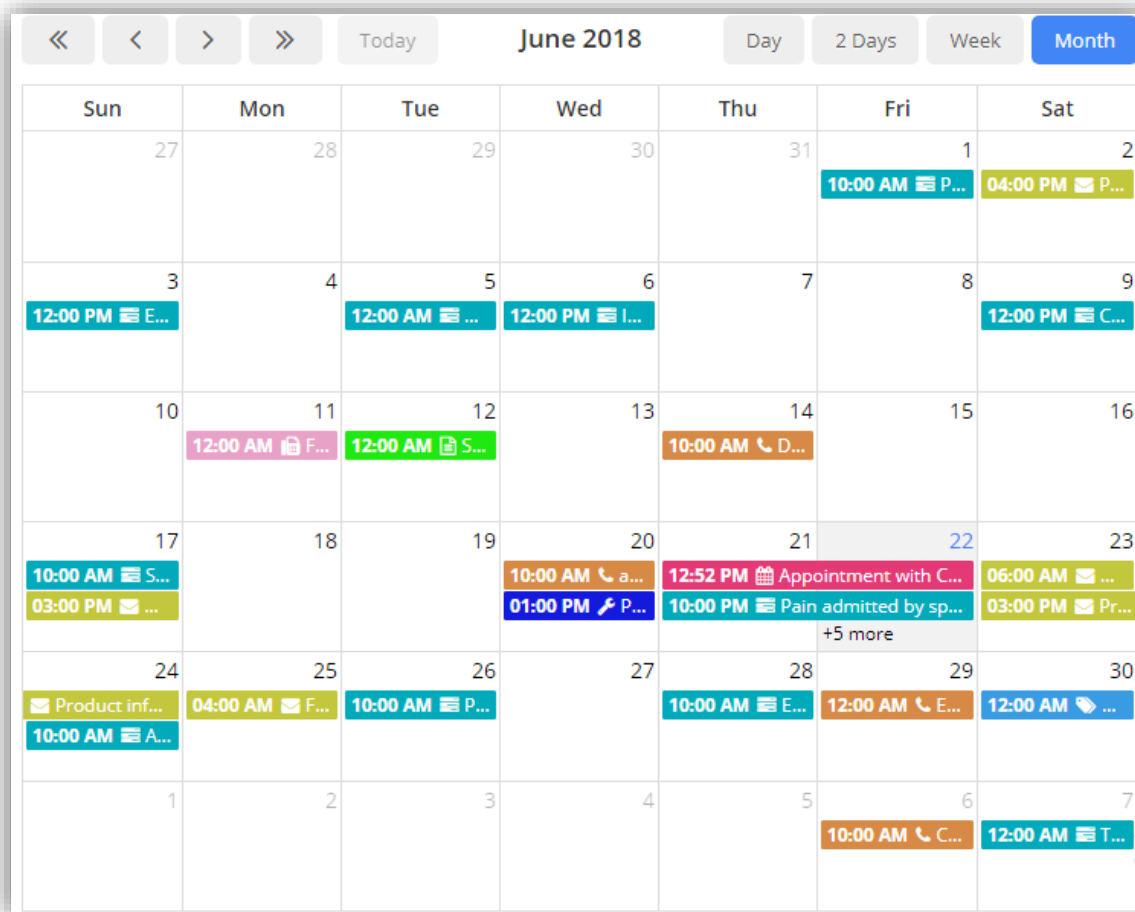
### Week View:

- You can see the activities for the week in the List View.



### Month View:

- You can see the activities for the month in the List View.

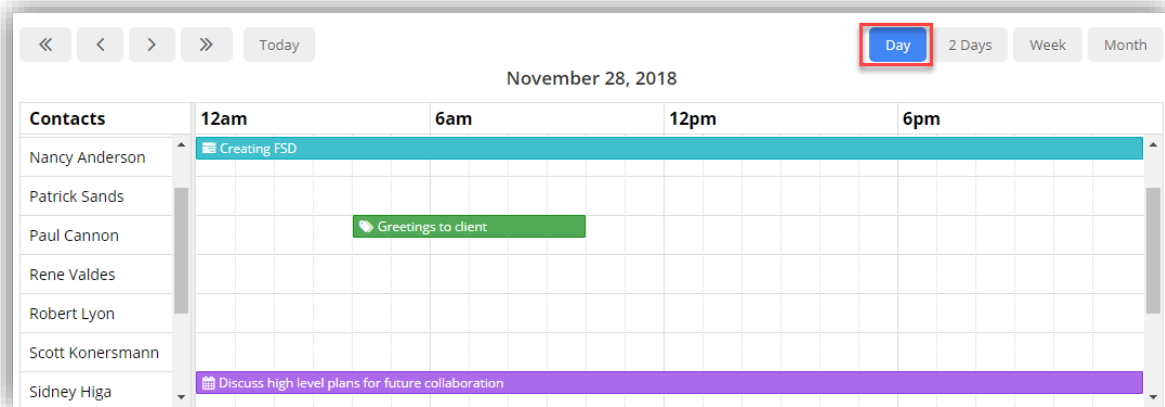


## Gantt View

- Get a Gantt view in which you can view the resources in top down manner and date range in a horizontal display. Here resources can be Team/User, Accounts, Contacts, Facilities/Equipment and are displayed based on your selection of calendar view.
- In Gantt view, you can also view all or individual Events (Activities) along with its details like Name of the event, Start date, End date and resource name (As configured to view from the configurations page).
- In addition, you can view the calendar in Gantt View as per the Day, Day Span, Week or Month format.

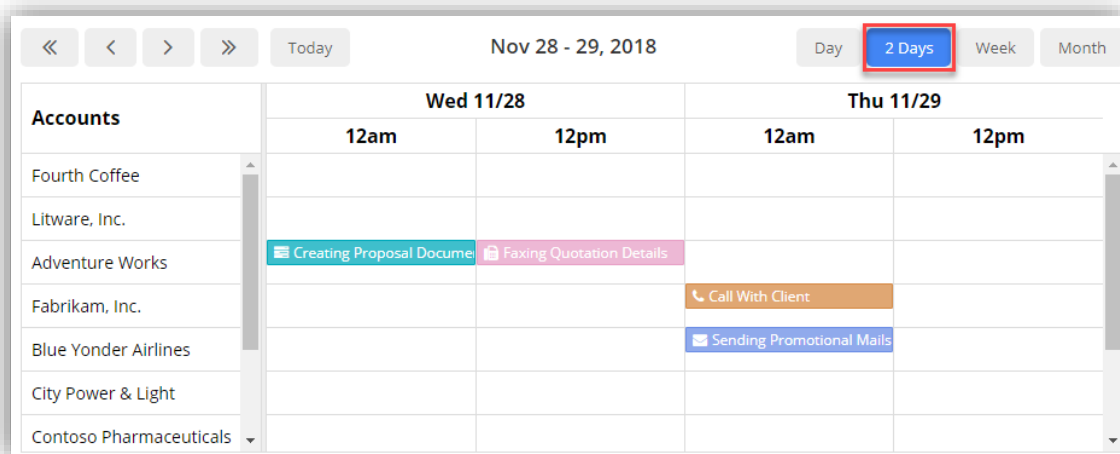
### Day View:

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



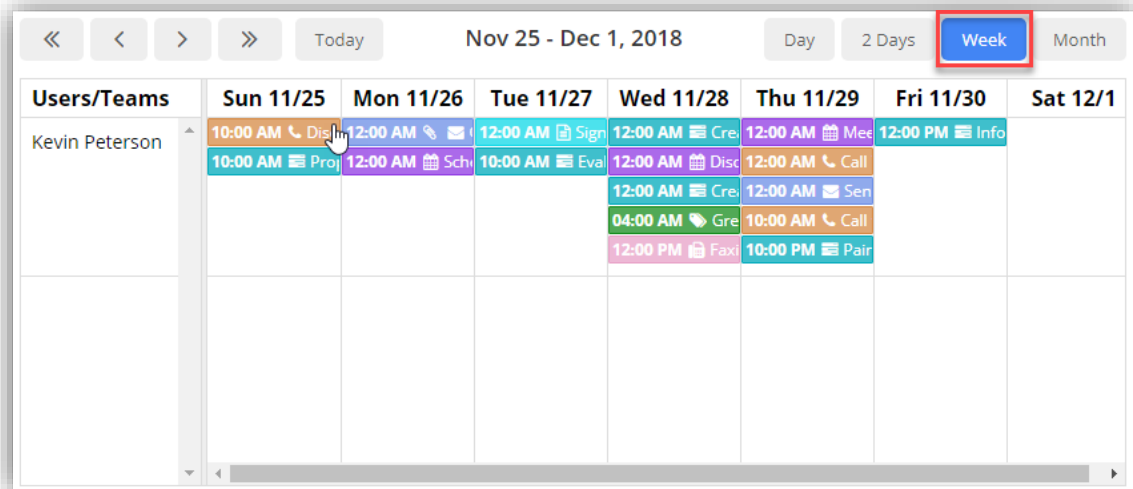
### Day Span View:

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



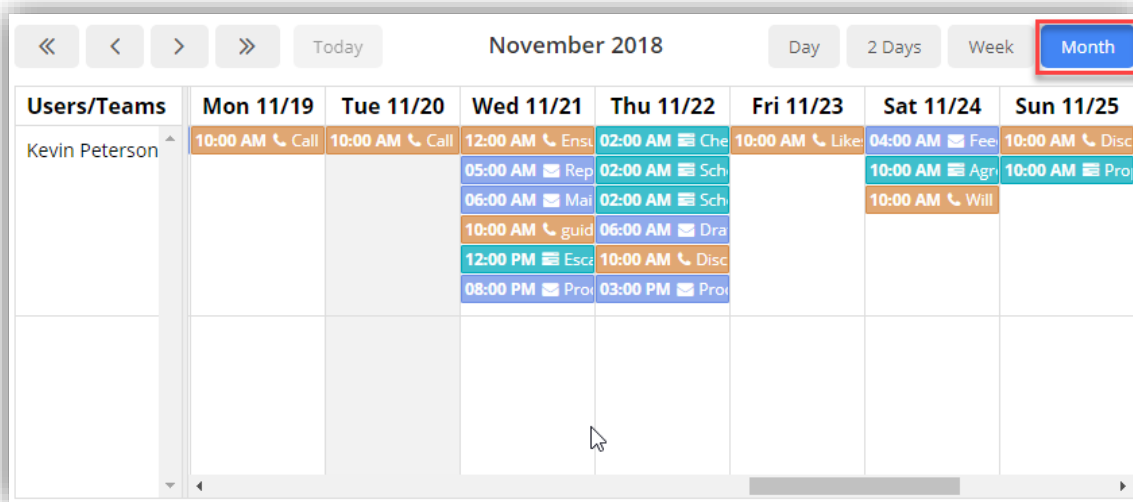
### Week View:

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



### Month View:

- You can see the activities for the month in the Gantt View.



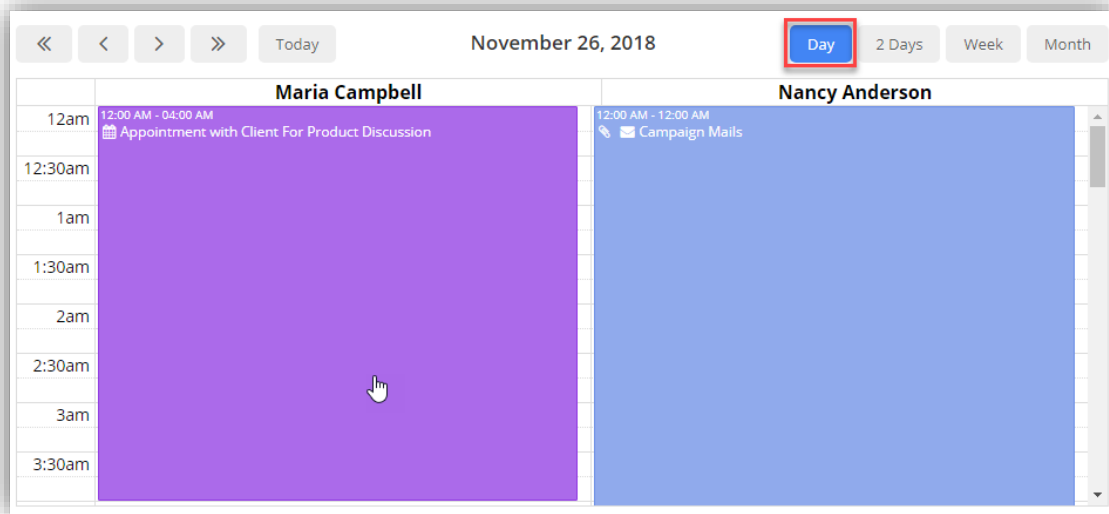
### Top Down View

- This view provides you a Top Down view of the calendar in which you can view a column per member on the horizontal axis and time on the vertical axis, and a plain view of activities. Members can be user/team, account, contact or facilities/equipment depending on choice selected by you.
- In addition, you can view the calendar in Top Down View as per the Day, and Week view format.



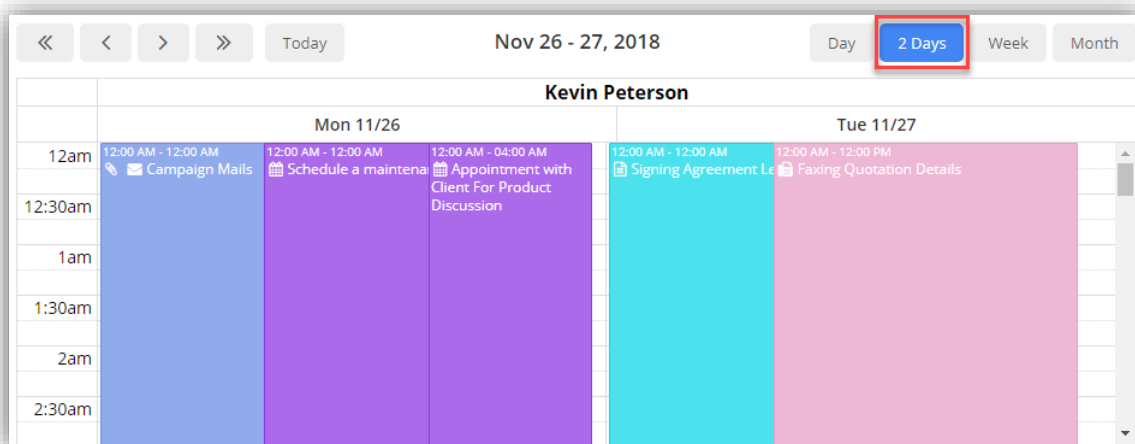
## Day View:

- You can see the activities for the day in the Top Down View.



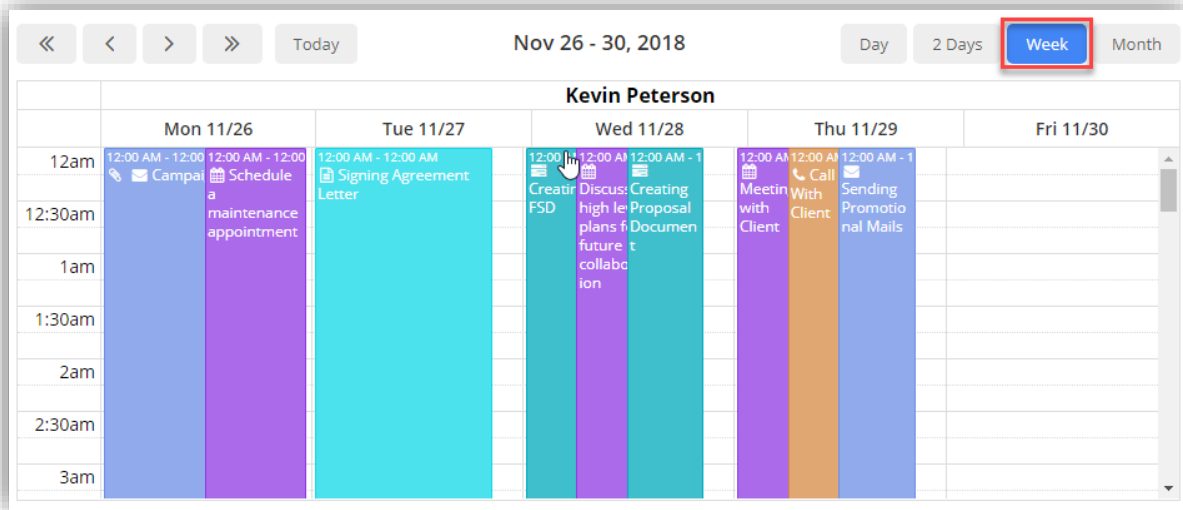
## Day Span View:

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



## Week View:

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

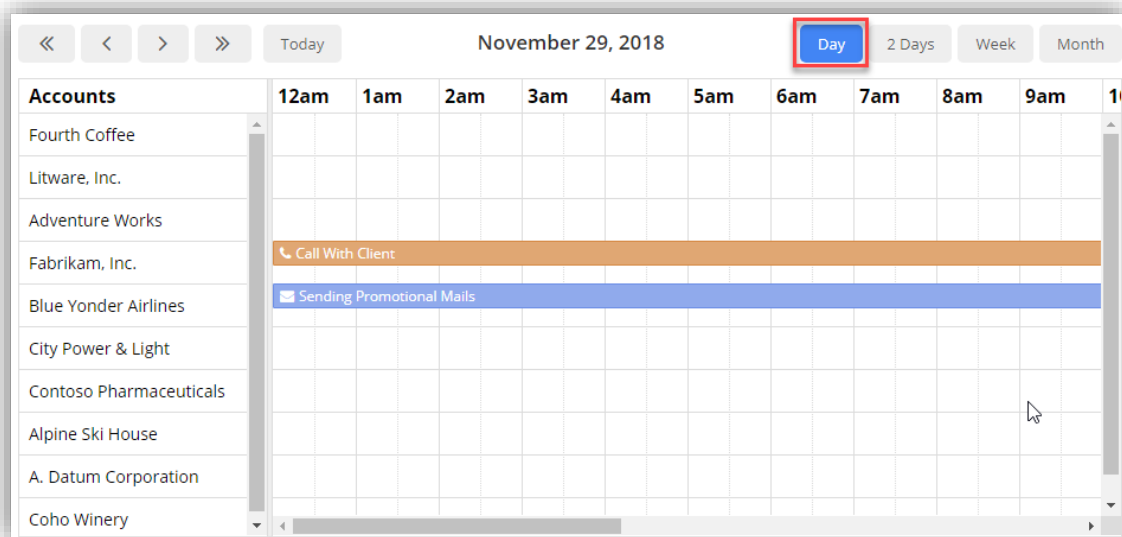


## Timeline View

- This view provides you a Timeline view of the calendar in which you can view the simple sequential overview of the calendar- separated by day and resources. Resources can be Accounts, Contacts, Users/Teams or Facilities/Equipment based on preference selection.
- In addition, you can view the calendar in Timeline View as per the Day, Week or Month format.

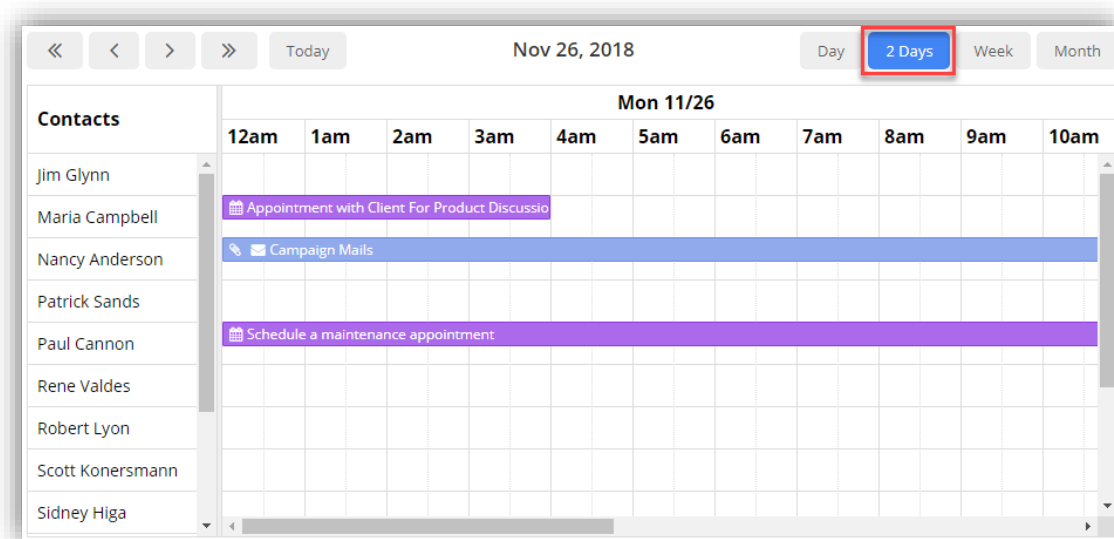
### Day View:

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



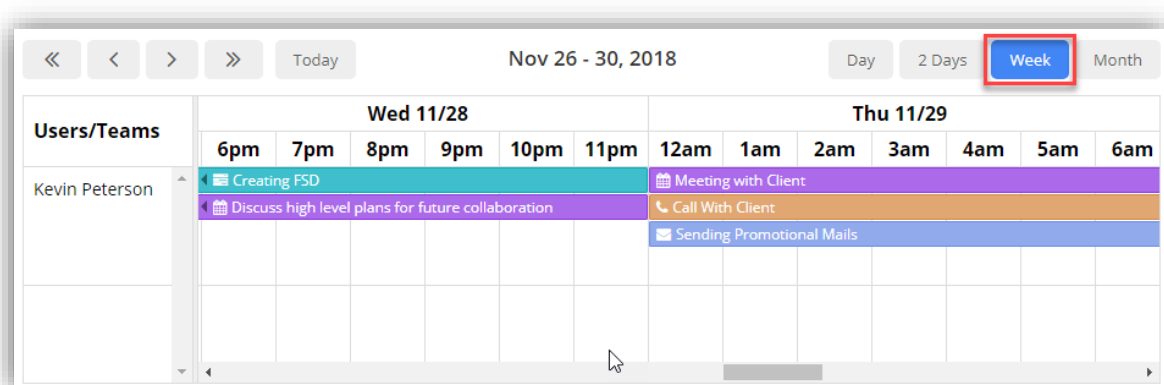
## Day Span View

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



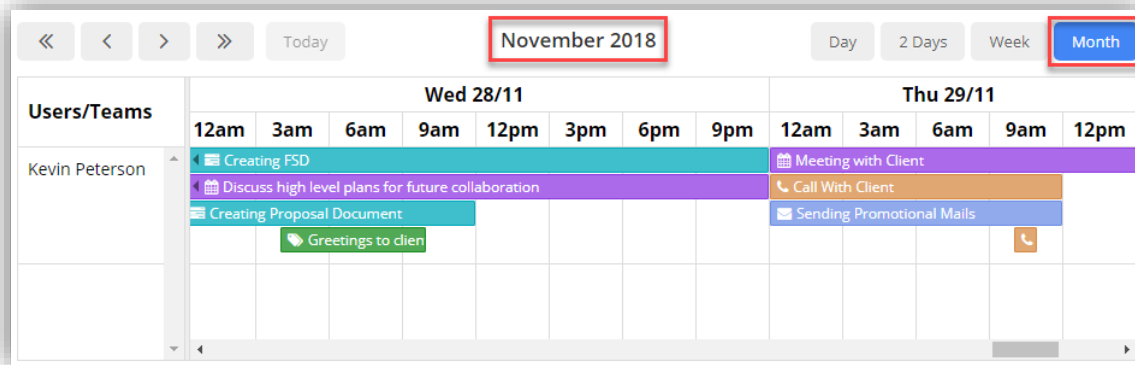
## Week View:

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



## Month View:

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

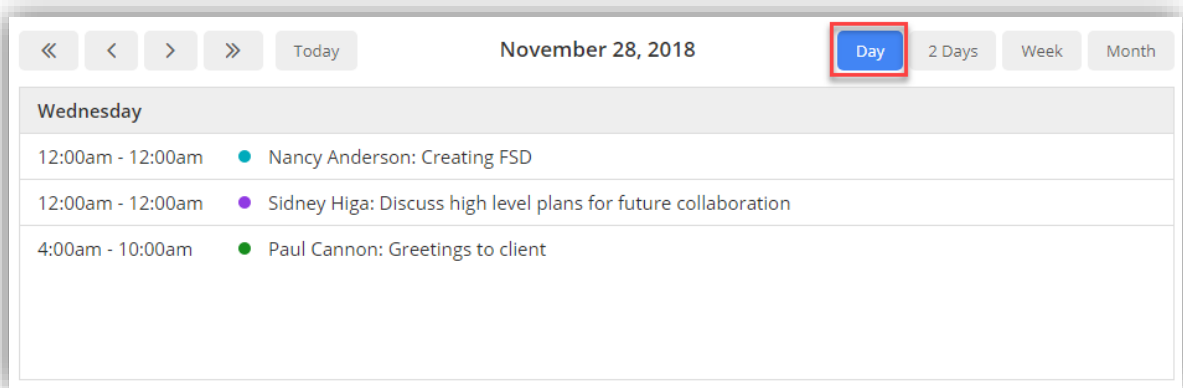


## Agenda View

- This view provides you an Agenda view of the calendar in which you can view a sequential list view with grouping options for other resources like accounts, contacts, facilities/equipment or users/teams or by date as per the requirements.
- In addition, you can view the calendar in Timeline View as per the Day, Week or Month format.

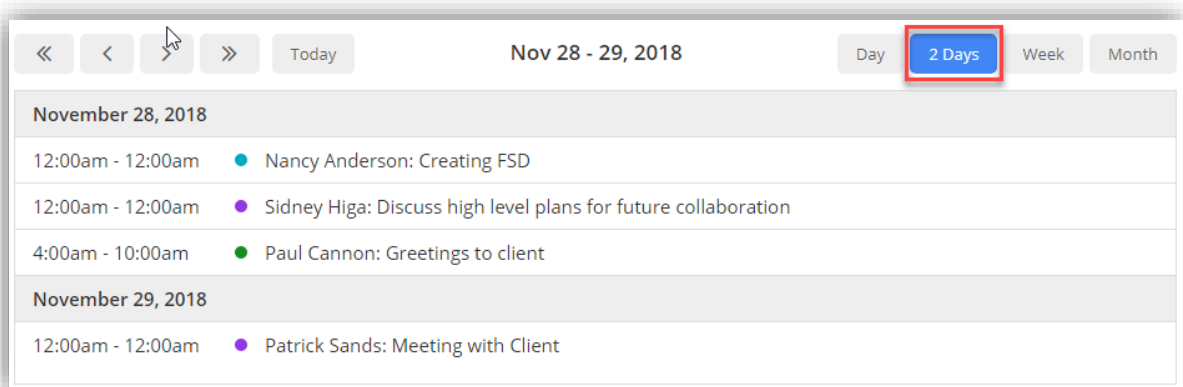
### Day View:

- You can see the activities for the day in the agenda view.



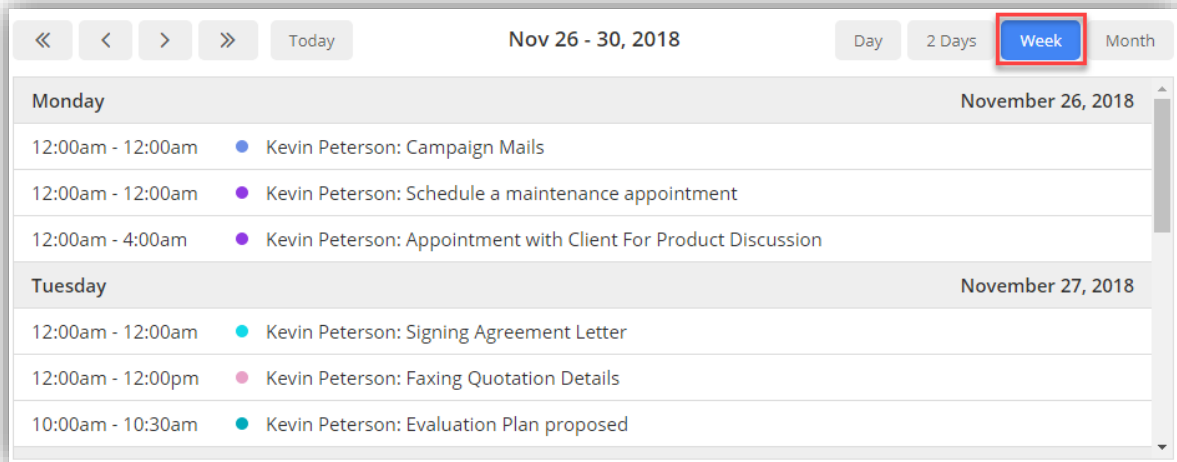
### Day Span View:

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



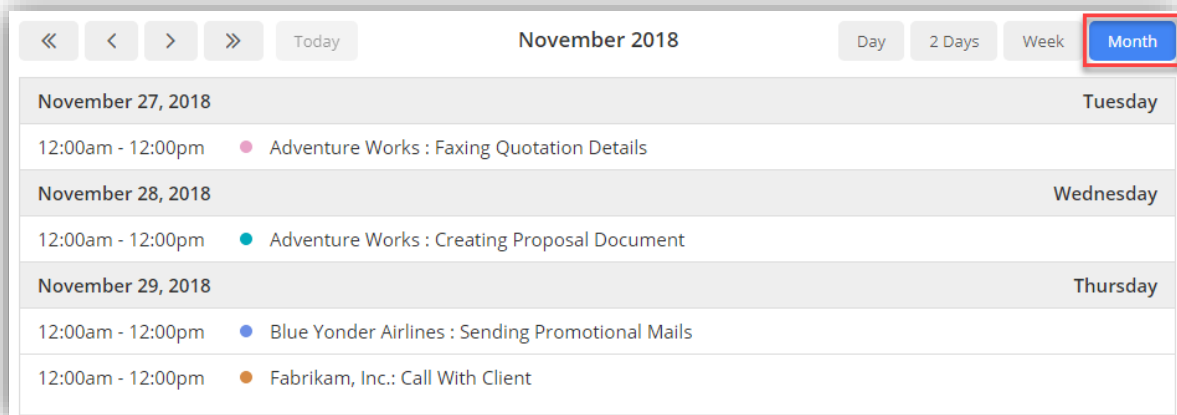
## Week View:

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



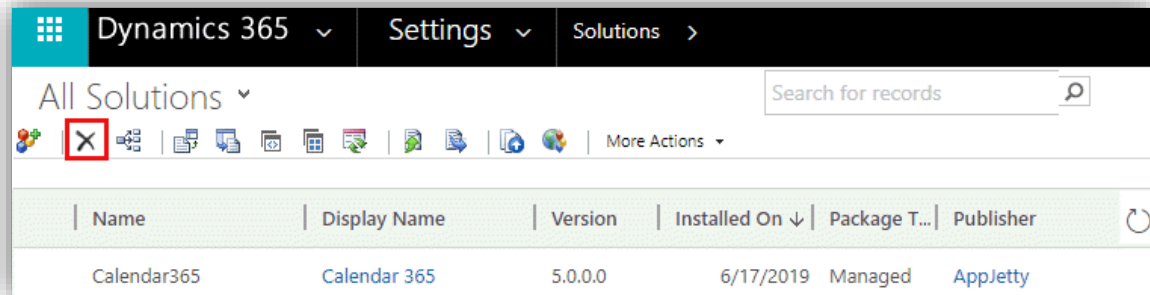
## Month View:

- You can also see the activities for the month in the agenda view.

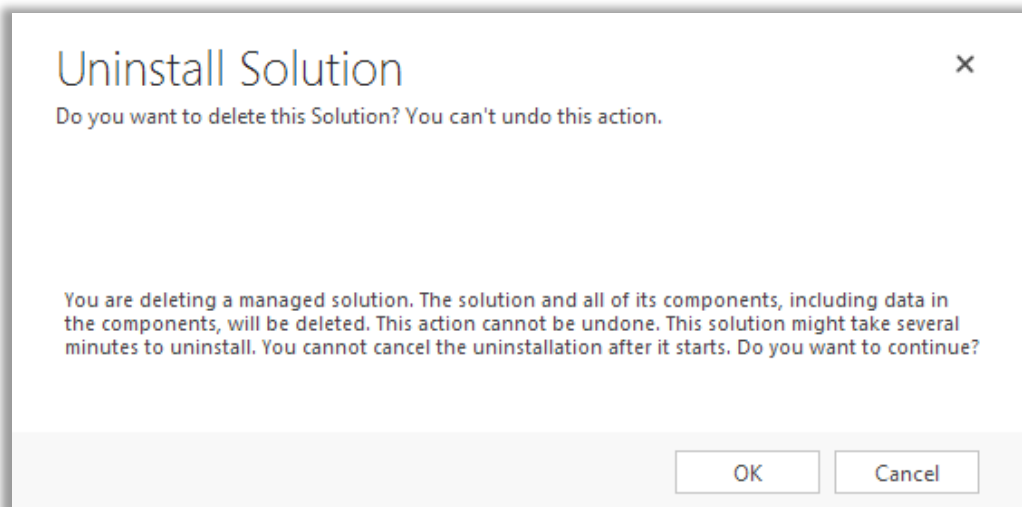


## Un-installation Steps

- To uninstall the Solution, go to **Settings** - > **Solutions**.
- Check on the Plug-In Name and click on **'Delete'**.



- Click on **'OK'** to Delete and uninstall the solution from CRM.



## Contact Us

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



### Live Chat

- Get instant support with our Live Chat.
- Visit our product page at:  
<https://www.appjetty.com/dynamicscrm-all-in-one-calendar.htm> and click on the Live Chat button for instant support.



### Tickets

- Raise tickets for your specific question!
- Send an email to [support@appjetty.com](mailto:support@appjetty.com) or you can login to my account [www.appjetty.com](http://www.appjetty.com) and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

### 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)