User Guide

Of

Dynamic CRM Solution - Event calendar

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Event Calendar

In Dynamic CRM, keeps a quick observation on all the activities or tasks running daily in various teams. Managing bundle of appointments, service activities, number of phone calls, important dates, lists of tasks are tough to keep on finger tips daily.

Here is the single solution for these routine multiple tasks. The unique Calendar will notify you about your daily multiple appointments, task list, service activities, etc. You can keep an eye on your team members’ activities too within the CRM and all in one frame. This will also allow the user to choose and view the calendar of any team then further filter it by activity type, status, or an individual team member. This calendar will allow creating tasks, appointments, phone calls, etc.

Download the CRM from our website and integrate it in your CRM for managing the day to day numerous tasks, appointments, etc. This solution will help you in managing your time and work effectively.

You can also find other CRM solutions also such as Lead Integration, Auto SMS, Auto number and CRM Twitter.

Once downloading the event calendar solution from the website, find the below steps for further configuration.
Follow The Steps for configuring the Event Calendar:

1. **Create Your Profile:**
   Fill the required general details for creating your Profile then press submit.

2. **Go to Extension Column:**
   The Auto SMS solution can be accessed from the Extension column.
3. **Calendar:**
The image below is the screenshot of the calendar view which is available for managing the Appointments, Tasks and Phone/call. The user will be able to view the calendar in week/day/month mode. The new activity and new record can be added on any specific date.

**Activities**

The calendar will let you manage the following activities:
- Appointments
- Tasks
- Phone calls

The above calendar view will remind you about your daily/weekly/monthly tasks. The Event calendar won’t let you miss a single phone call or appointment.

**Add new Activity or Record:**

From this panel, the user can create a new activity as well as a new record.

**Import Data:**

The data can be imported into the calendar.