

User Guide

Of

Dynamic CRM Solution- Event calendar



DISCLAIMER

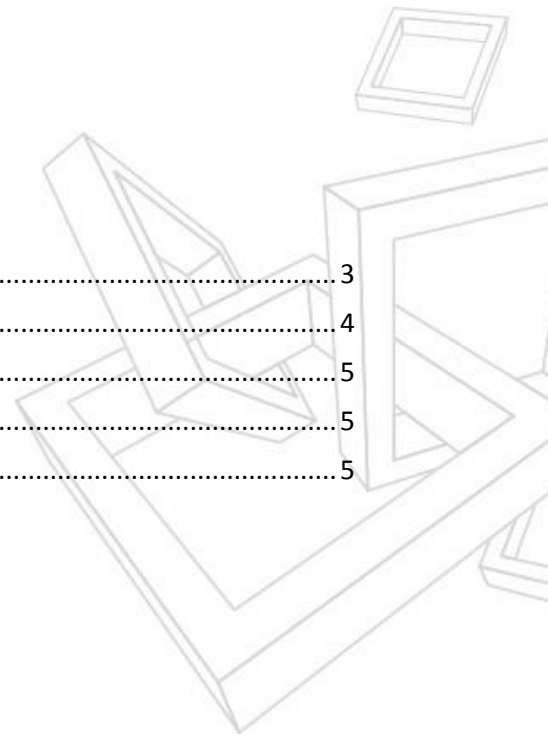
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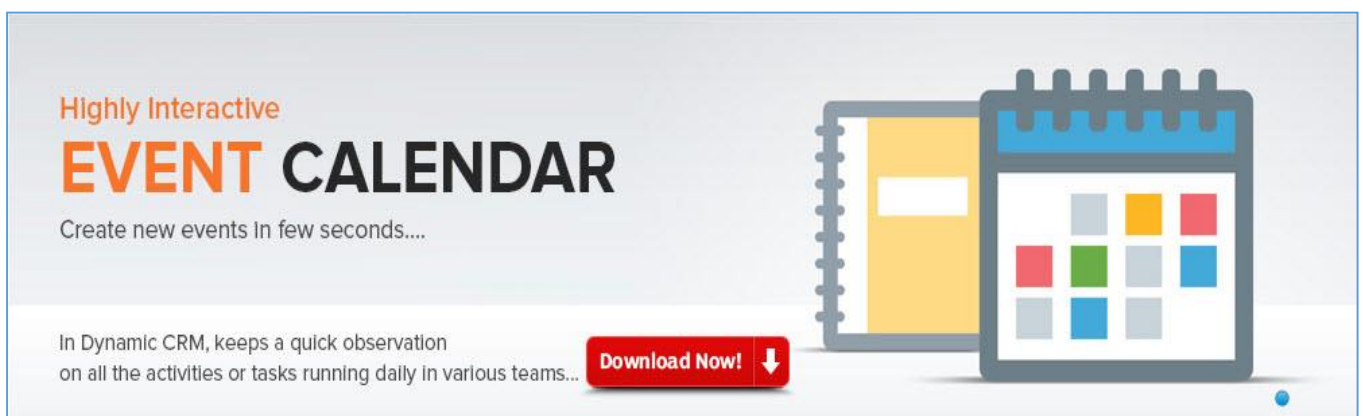
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Event Calendar

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.

A promotional banner for the 'Highly Interactive EVENT CALENDAR'. The text on the left reads 'Highly Interactive EVENT CALENDAR' in orange and black, followed by 'Create new events In few seconds...'. Below this is a smaller line of text: 'In Dynamic CRM, keeps a quick observation on all the activities or tasks running daily in various teams...'. To the right of the text is a red 'Download Now!' button with a white downward arrow. On the far right is an illustration of a blue and white calendar with a grid of colored squares (red, green, blue, yellow) representing events.

Highly Interactive
EVENT CALENDAR
Create new events In few seconds...

In Dynamic CRM, keeps a quick observation on all the activities or tasks running daily in various teams...

[Download Now!](#) ↓

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.

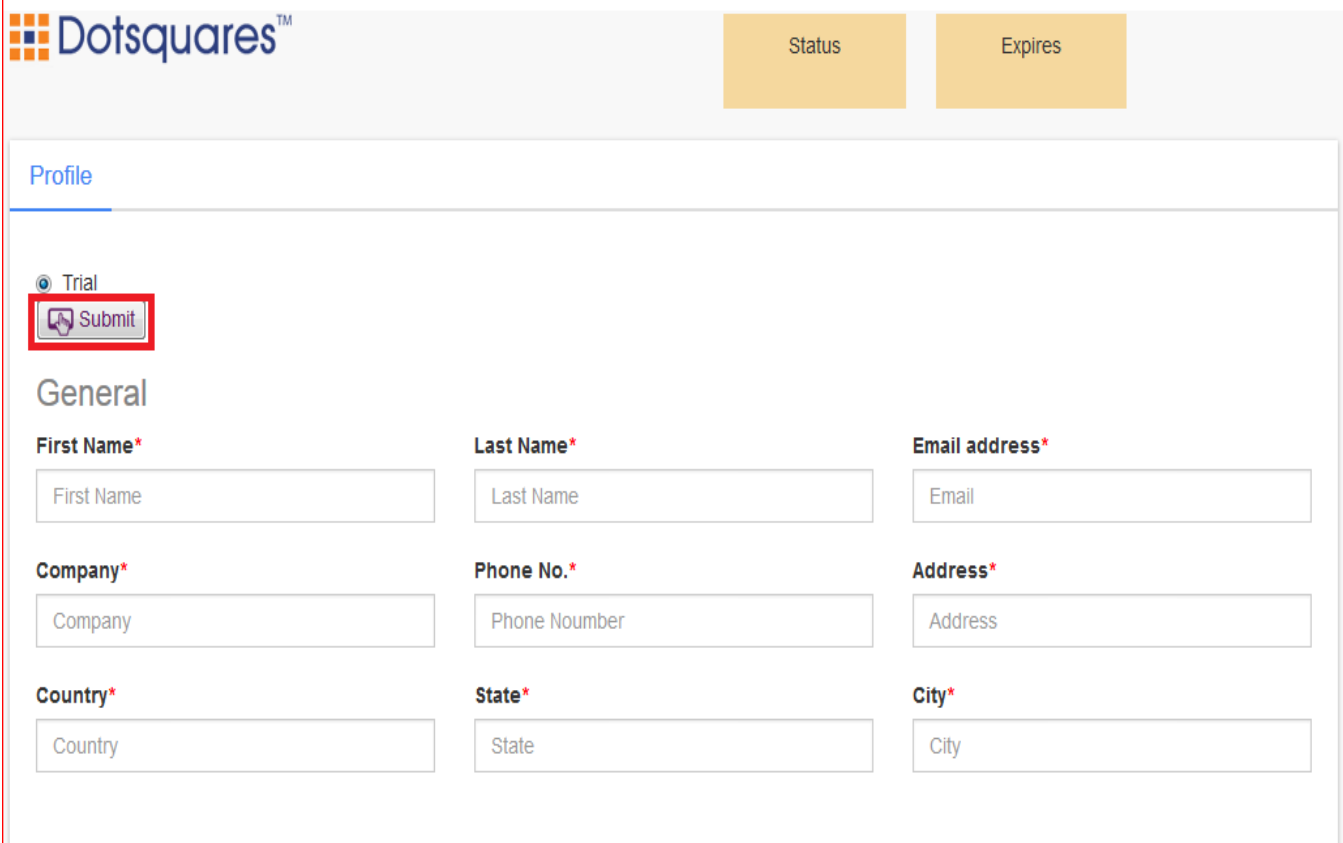
You can also find other CRM solutions also such as Lead Integration, Auto SMS, Auto number and CRM Twitter.

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.

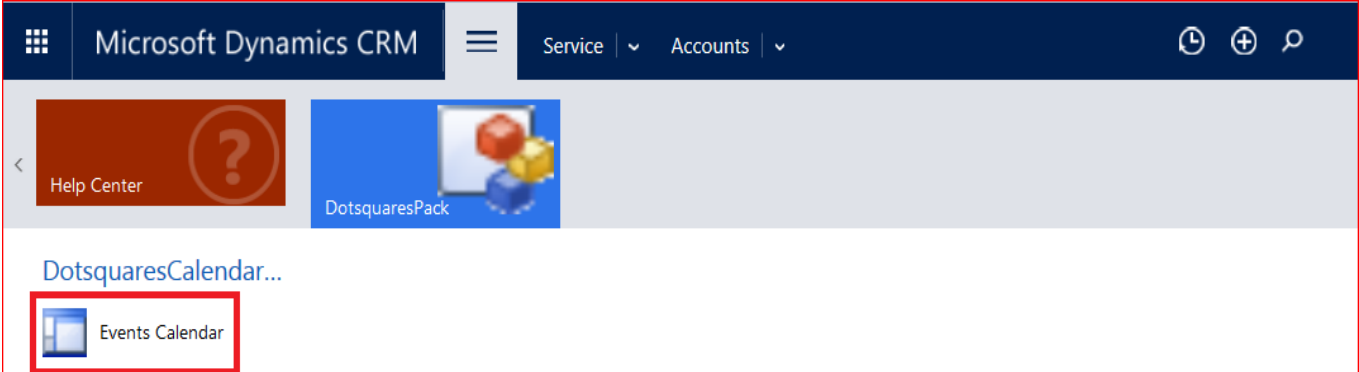


The screenshot shows the Dotsquares profile creation interface. At the top left is the Dotsquares logo. To the right are two yellow buttons labeled 'Status' and 'Expires'. Below the logo is a 'Profile' section with a 'Trial' radio button and a 'Submit' button highlighted with a red box. The main form is titled 'General' and contains several input fields arranged in a grid:

First Name* First Name	Last Name* Last Name	Email address* Email
Company* Company	Phone No.* Phone Noumber	Address* Address
Country* Country	State* State	City* City

2. Go to Extension Column:

The Auto SMS solution can be accessed from the Extension column.



The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes the Microsoft Dynamics CRM logo, a menu icon, and dropdown menus for 'Service' and 'Accounts'. Below the navigation bar is a ribbon with several tabs: 'Help Center', 'DotsquaresPack', and 'DotsquaresCalendar...'. The 'DotsquaresCalendar...' tab is highlighted, and its sub-tab 'Events Calendar' is also highlighted with a red box.

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.

NEW ACTIVITY ▾ + NEW RECORD ▾ IMPORT DATA

Activities **March 2016** month week day today < >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	1	2	3	4 4:51a Greg was out of	5 ^
6	7	8 9:54p Brian purchased 9:55p Follow Up with E 9:59p Brian called and	9	10	11	12
13	14	15	16 1:15a Long standing c 1:16a Follow up with A 3:22a Send list of print	17	18	19

Appointments
 Tasks
 Phone/Calls

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.