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.

Coding Version : 20152016.042016.3.0
Document Version : 20152016.042016.3.0
Date of Document : June 13, 2016
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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.

![Developer Resources](image)

Figure 1: Developer Resources

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

![Organization Unique Name](image)

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](attachment://ActivityCalendar_20152016.042016.3.0_managed.zip)

![Licensing_20152016.042016.3.0_managed.zip](attachment://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](attachment://Figure_3.jpg)

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

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

Click on Next to proceed
- Click on Next to proceed

- 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.
- Select the product as **Activity Calendar** and **double click**
Activating License Key

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

![Microsoft Dynamics CRM](image)

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Figure 12: CRM showing the Solution installed

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

![Configuration Screen](image)

Figure 13: Activity Calendar Configuration

- Click on Licensing
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](image)

• 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](image)

• 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

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 salessteam@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](image1.png)

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](image2.png)
How to Create a New Activity

To Create a New Activity just Right click on the date or wherever 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 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)
Calendar View – Day

- 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

- 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.
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.)

![Time Line Week Day wise](image1)

![Time Line Week View Enlarged](image2)

- Weekly Calendar always displays for the selected week (i.e. from Monday to Saturday)
Time Line View – Month Wise

- 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 activities from one date to another or One time schedule to another.
- After the Activity is dragged to another date or place as required, the system asks for confirmation of the same as shown below - Click OK to confirm and proceed further.
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](image1)

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

![Figure 33: Uninstall Solution](image2)

- 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 portal technologies in the business of delivering add-on products and services.

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)

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**F. Customer Care details**

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

<table>
<thead>
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<th>Availability and hours of operation:</th>
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<tr>
<td>Monday to Friday</td>
<td>Management Technologies Consulting, LLC</td>
</tr>
<tr>
<td>USA PST 323-851-5008 - 8:00 AM to 6:00 PM</td>
<td>7738 Sky hill Drive, Los Angeles, CA 90068</td>
</tr>
<tr>
<td>India IST 323-863-0077 - 8:30 PM to 8:30 AM in PST</td>
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Request and receive support online at [www.MTCCRM.com](http://www.MTCCRM.com) Review, order, fund, track, and manage your solution needs online securely, conveniently, affordably 24/7 with MTC online. MTC is a leader in CRM customer web Portal offerings in connected Dynamics 365 / CRM enterprise solutions for social and business transactions—see solutions in action as you get what you need from MTC online on your time.