



Dynamics 365 / CRM / XRM Platform



Group Calendar

User Guide



CRM Versions Supported:
2011/2013/2015/2016/D 365

Group Calendar for Dynamics 365 / CRM is a productive add-on that allows users including managers and team members to keep track of various activities with differentiated color coding for clear status in day wise/week wise/month wise calendar and timeline views. Thus, Group Calendar helps in maintaining transparency within an organization while improving the efficiency and productivity of all the team members.

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Product Overview

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

The key features of Group Calendar are:

- User groups or multiple CRM users to view group calendar
- Save and Retrieve any calendar of your choice
- User can select the entity, color and tooltip attributes.
- All activities like phone, appointment, task etc. are available to view in calendar
- All calendars displayed either in Calendar view or Time line view
- Displays activities for one or more users
- Simple overview to control conflicts
- One simple Calendar for one and all
- View calendar as per your choice – day, week, month, year
- Views available User(s) wise and Team wise or Facilities wise
- Different color coding for activates
- Tooltip Color display for all attributes
- User specific rights assigned for every user
- User defined color codes for every activity
- 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
- Settings area to choose which activities should appear in right click menu
- Select User views , team views and facility views
- Adding button to Entity form

Installation Process

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

STEP 1:

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

STEP 2:

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



GroupCalendar_20152016.042016.12.0_managed.zip



Licensing_20152016.042016.12.0_managed.zip

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

STEP 3:

- To import the solution Open your CRM click on **SETTINGS→SOLUTION**

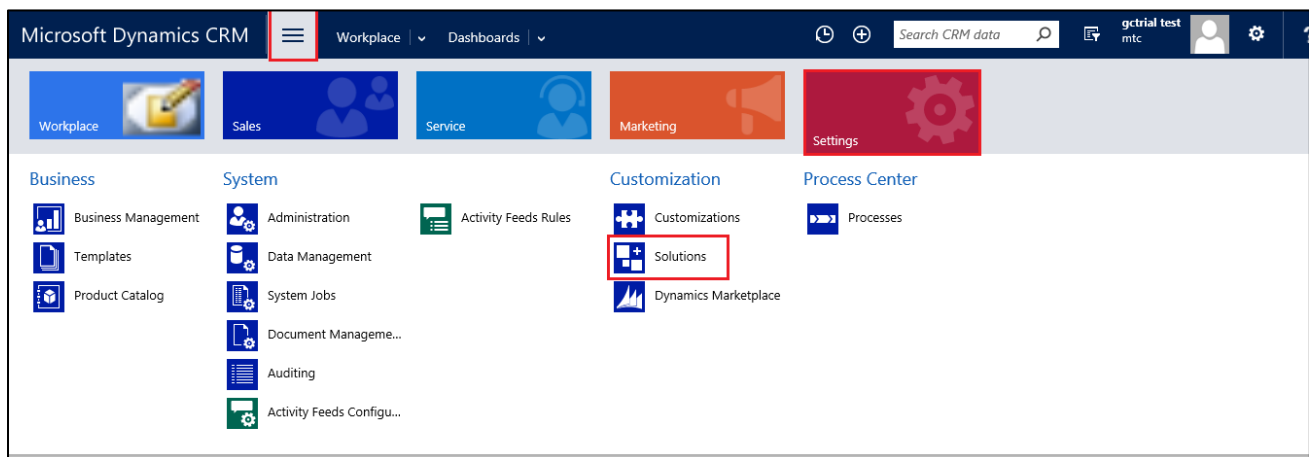


Figure 1: CRM Main Menu

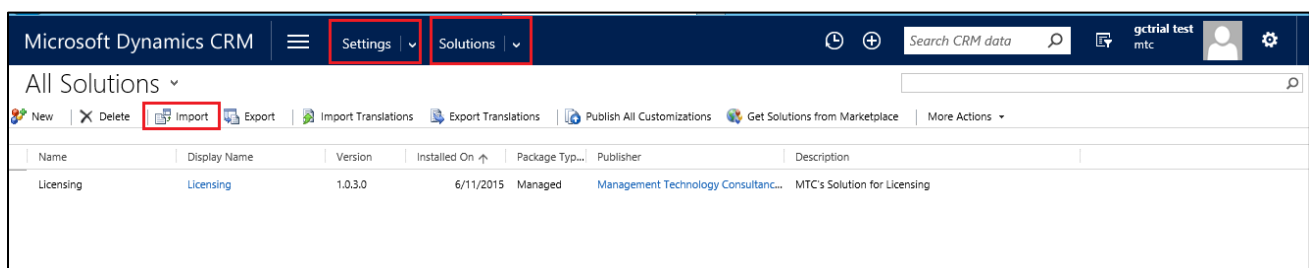


Figure 2: Import Solution

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.
- First Install the Licensing Solution and later followed by Group Calendar Solution

Installing Licensing Solution

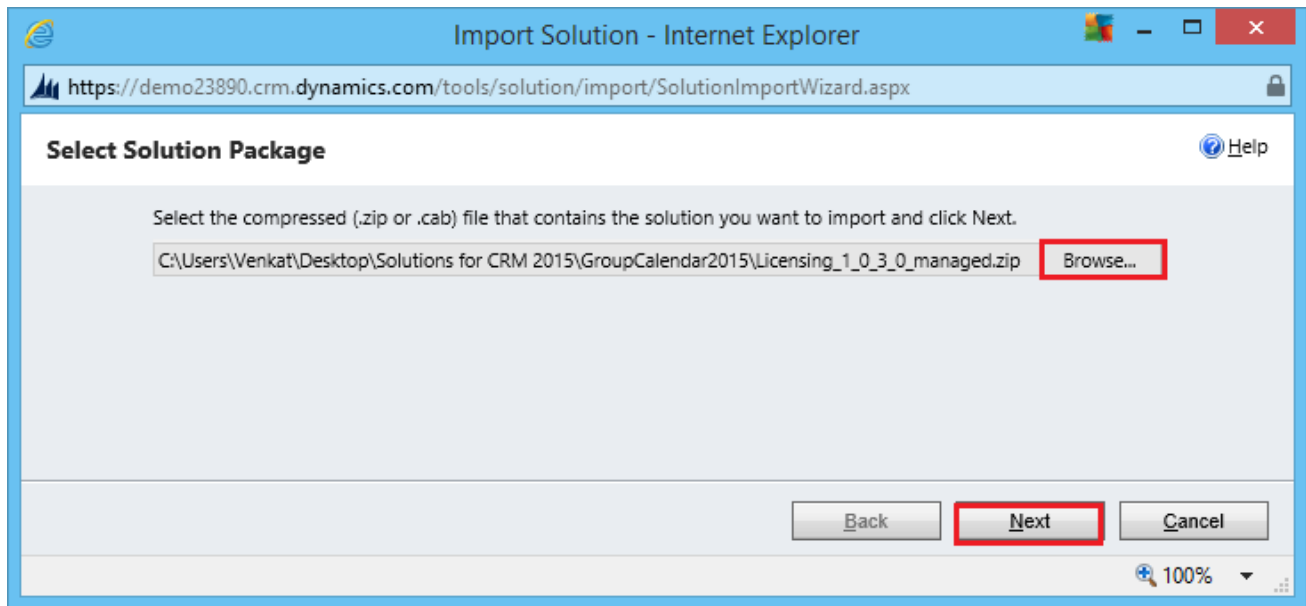


Figure 3 : Select Solution Package

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

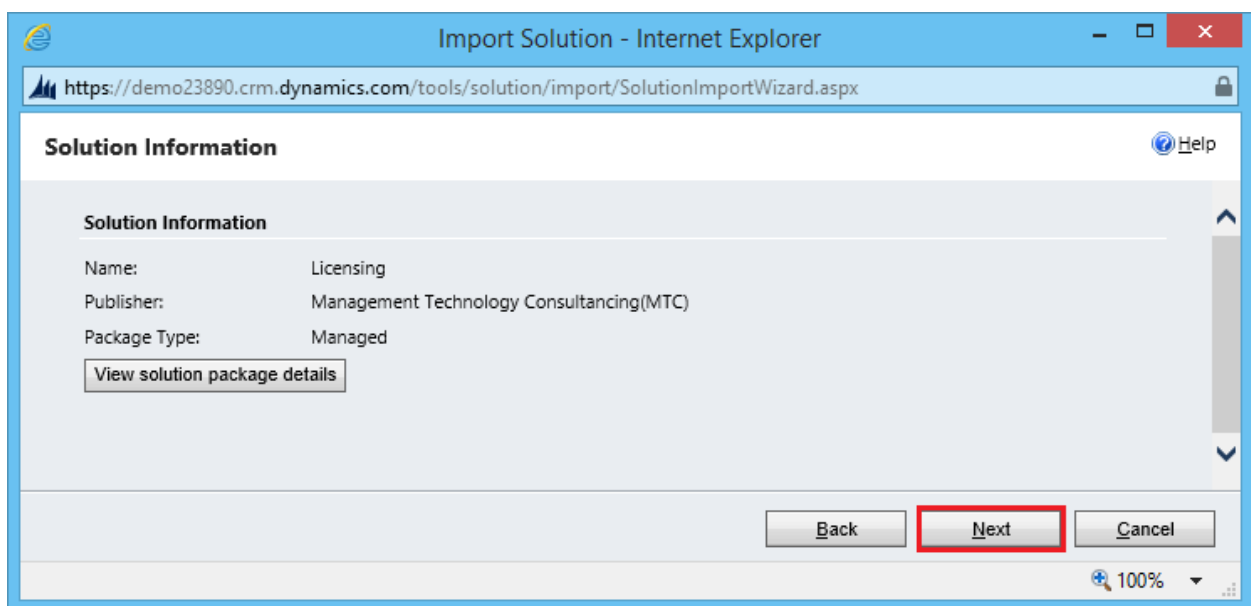


Figure 4: Importing Options window

- Click on Next to proceed

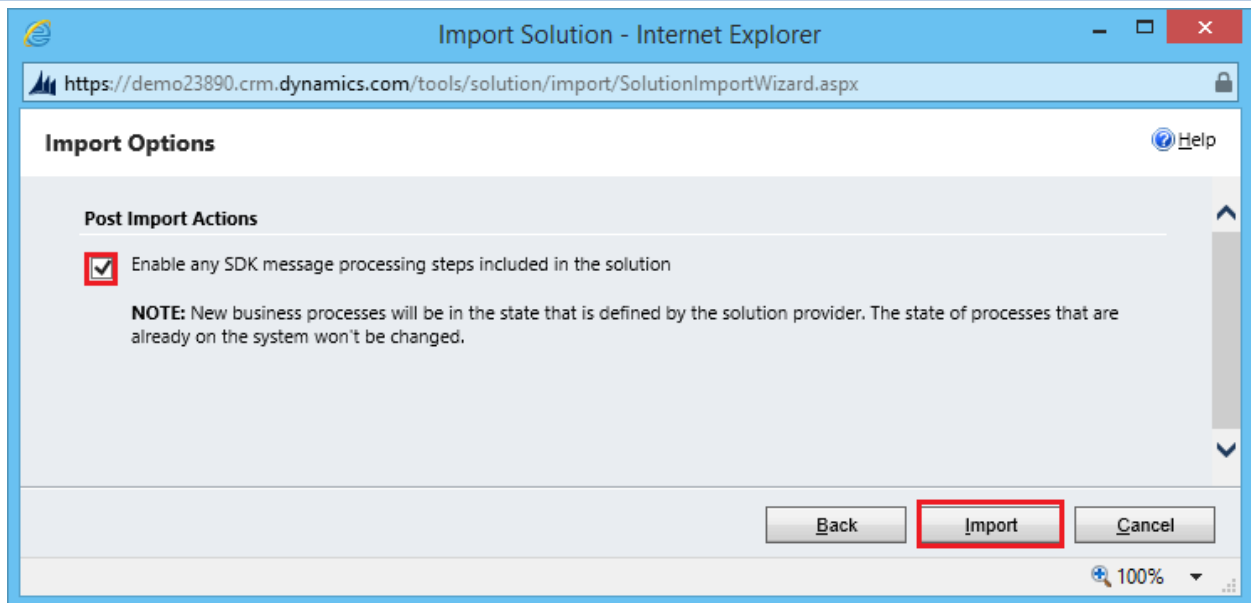


Figure 5: Import Option

- Click on Next to proceed

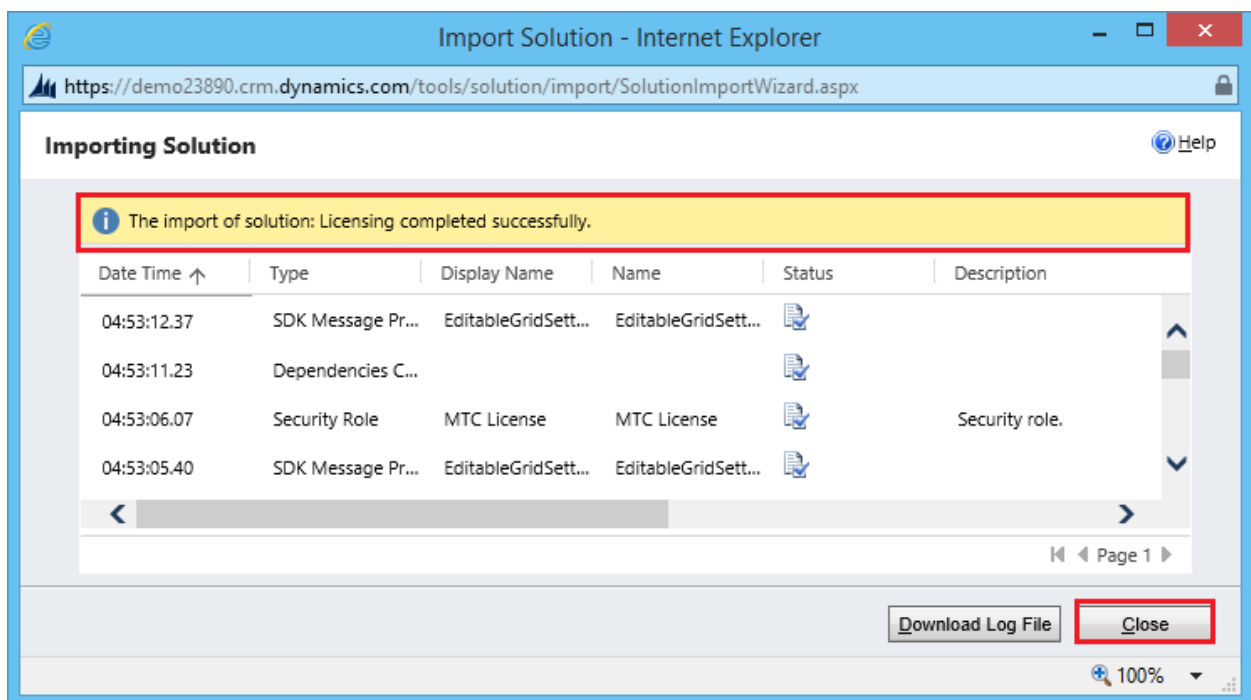


Figure 6: Importing Solution – Licensing

- Click on Close after successful completion message is displayed.

Installing Group Calendar Solution

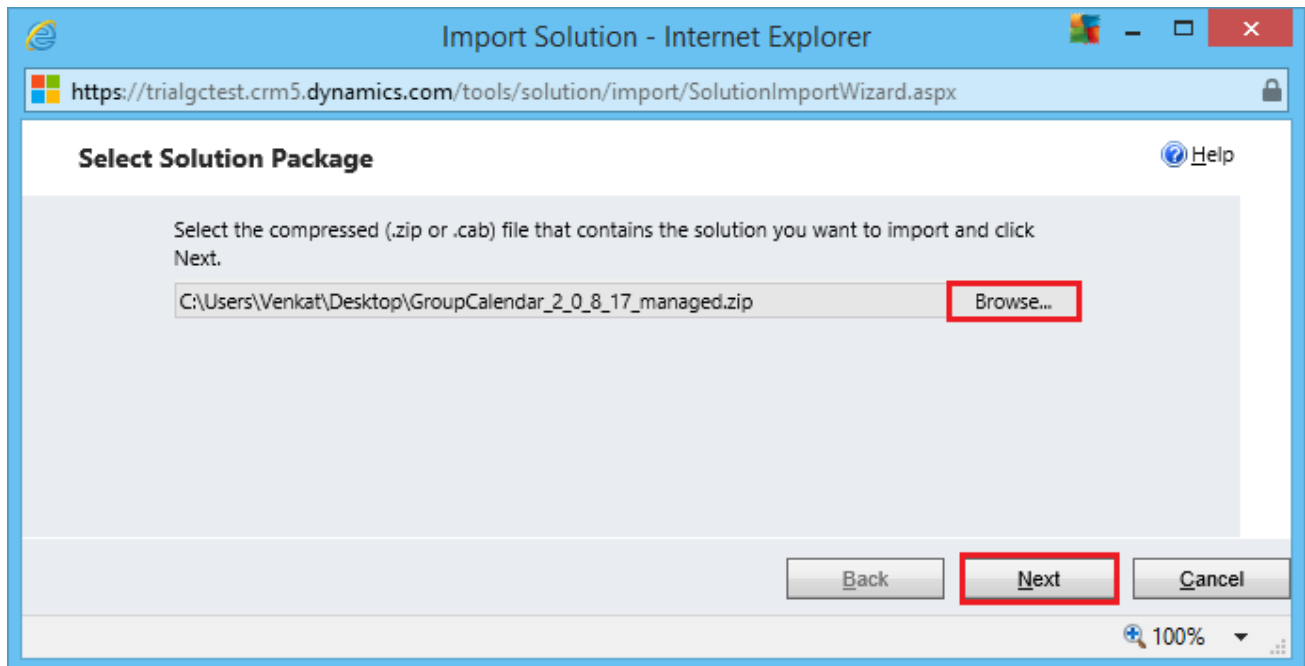


Figure 7: Select Group Calendar Solution Package

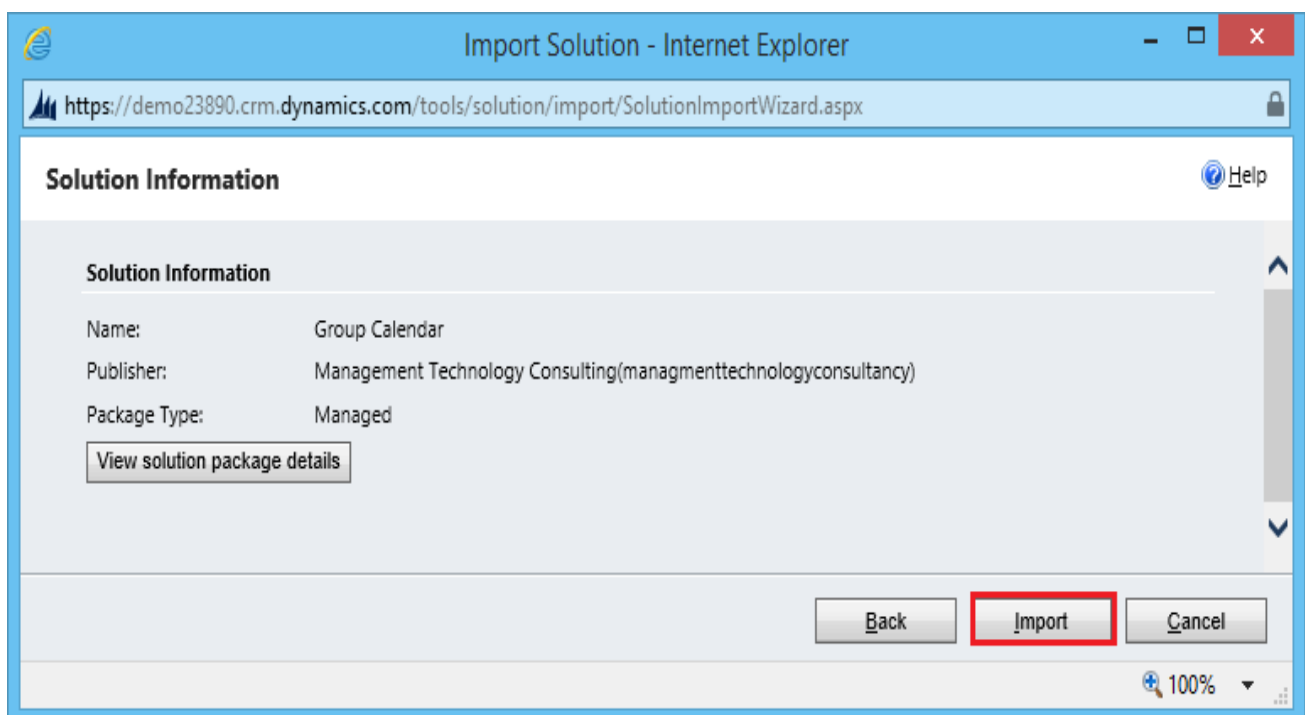


Figure 8: Solution Information

- Click on Import 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.

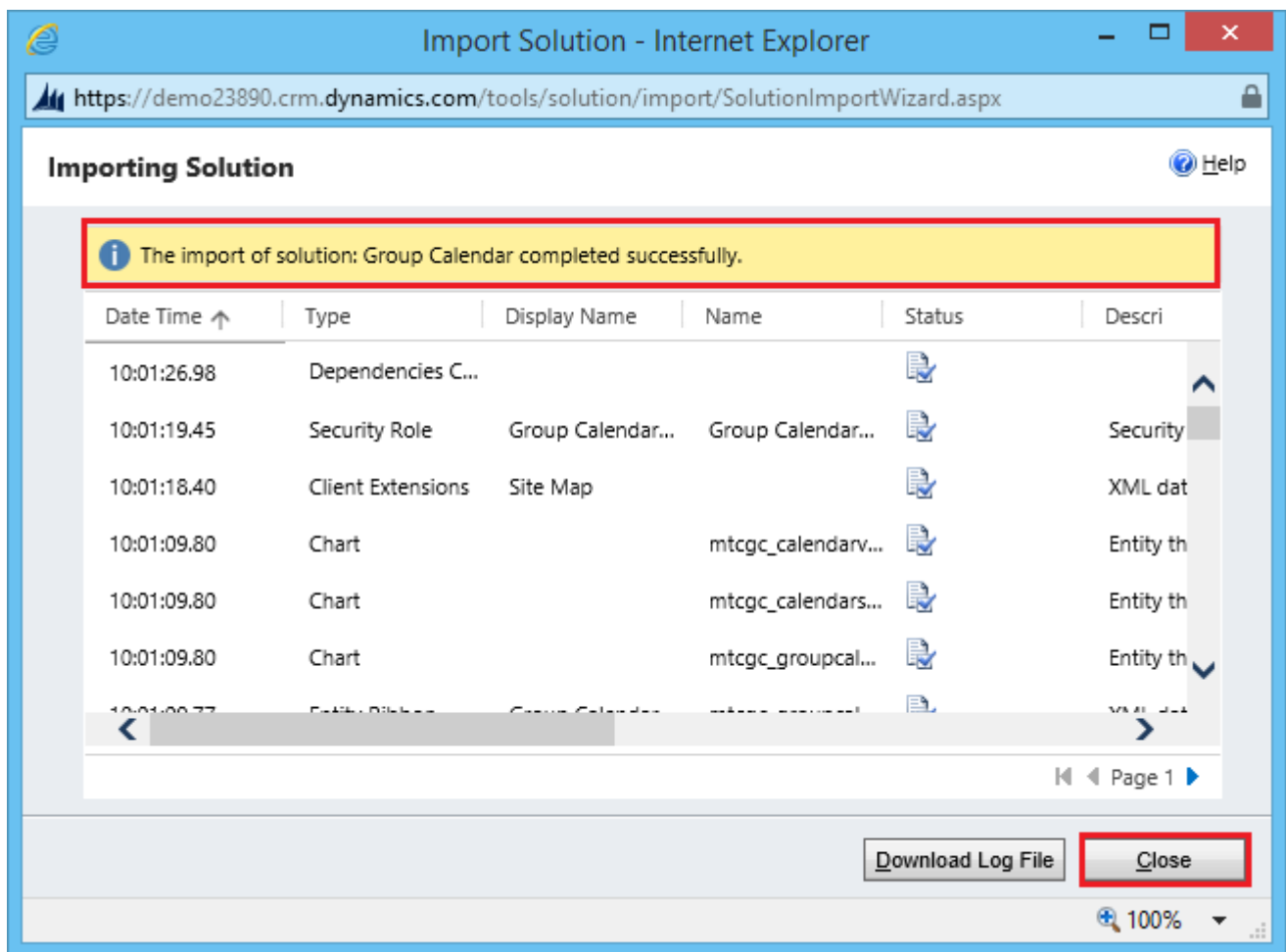
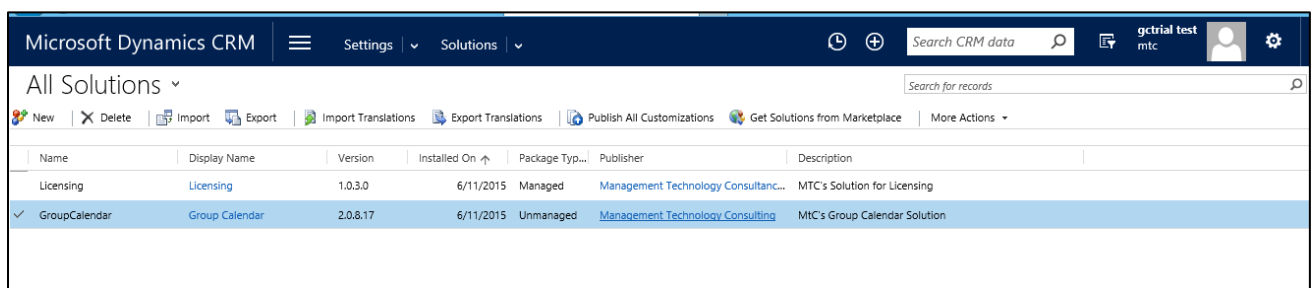


Figure 9: Importing Solution

- Click on Close button and Refresh the CRM (click on F5)
- After importing the Group Calendar Solution you need to place the License key navigate to **Settings→Solution→Click on GroupCalendar Solution**



How to get License Key?

- To install Group Calendar for Dynamics 365 / CRM you will require License Key, which you can get by sending an E-mail 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

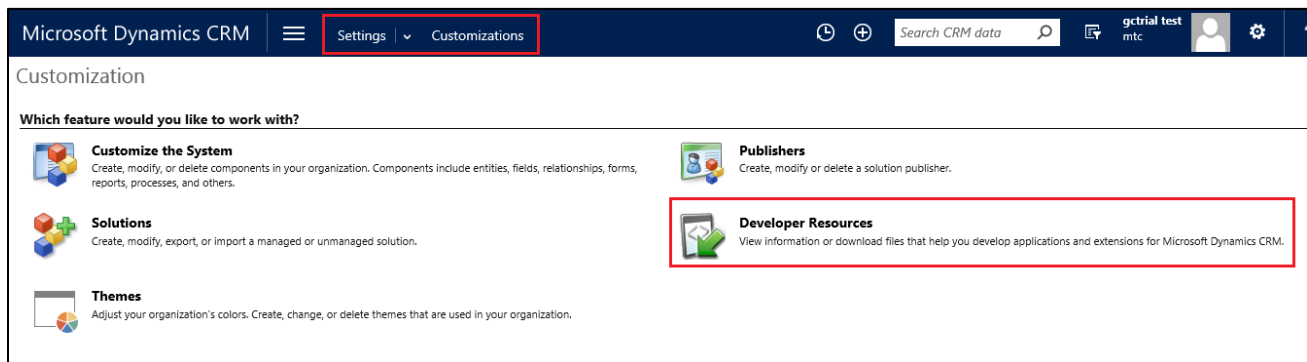


Figure 10: Developer Resources

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

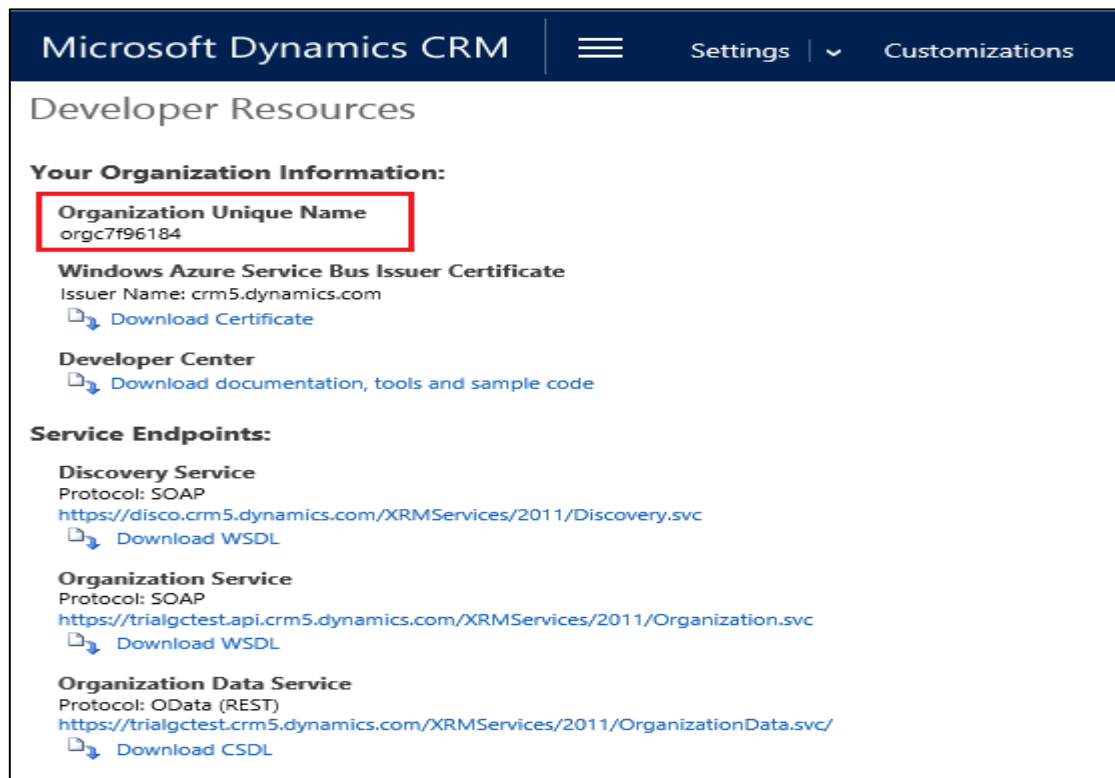


Figure 11: Organization Unique Name

- Send this Organization Unique Name through Email to salesteam@mtccrm.com and you will receive your Licensing Key within 24 hours.

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

Activating License Key

- Double click on Group Calendar Solution , which opens a new screen as shown below

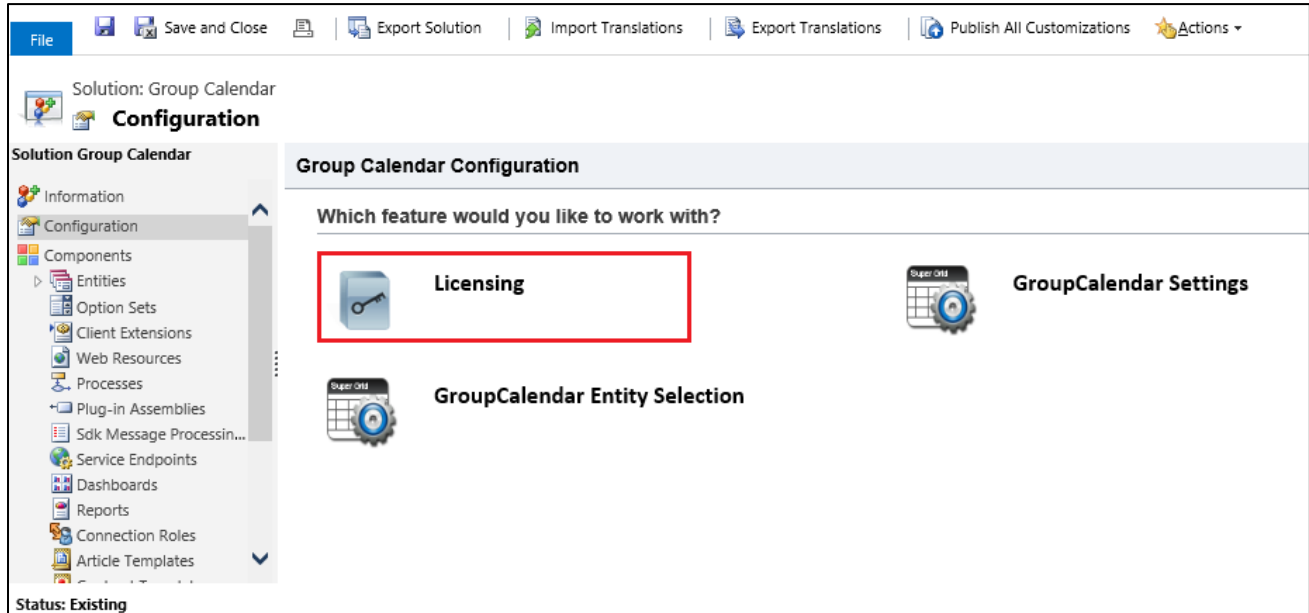


Figure 12: Configuration Screen

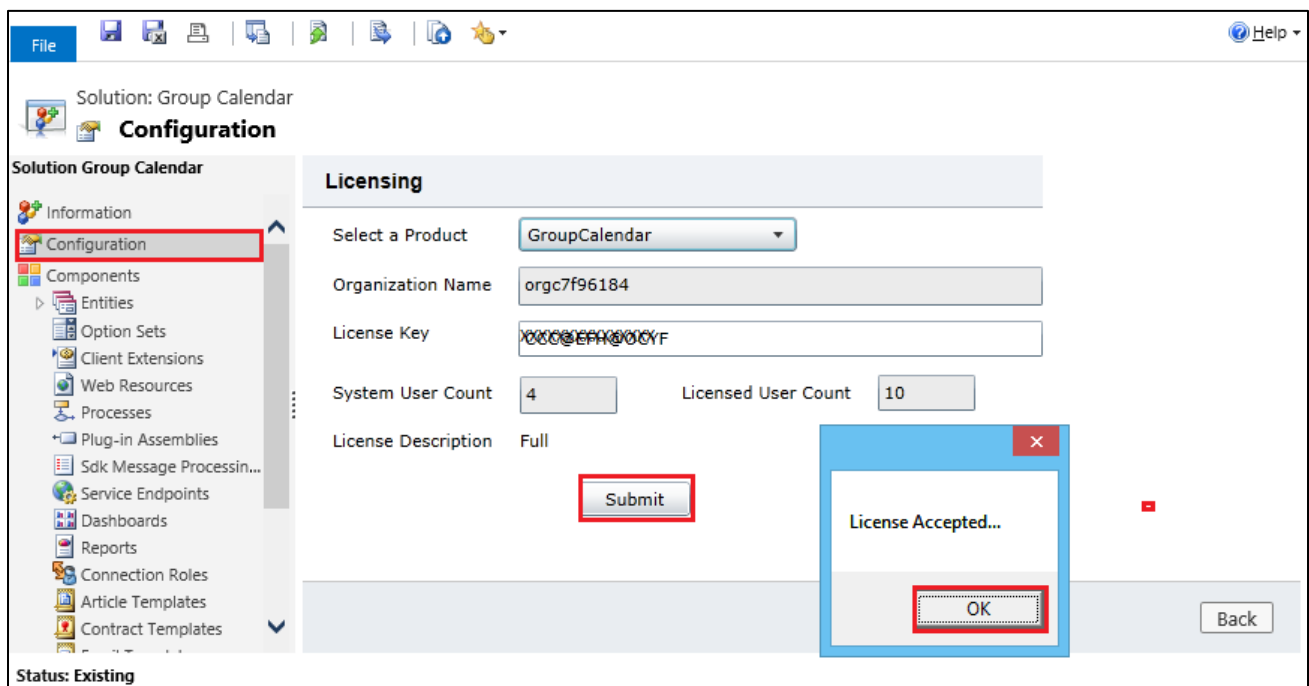


Figure 13: Licensing the Product

- Select Product as Group Calendar from the drop down list
- Enter the License key which you have received after placing the request
- Click on Submit tab

-
- Once License is accepted click ok to finish Installation process of the product.
 - Refresh the CRM (Press F5)

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.

Adding Group Calendar Button to Entity form.

- Import Ribbon workbench managed solution to CRM



RibbonWorkbench2013_2_0_0_5_managed.zip

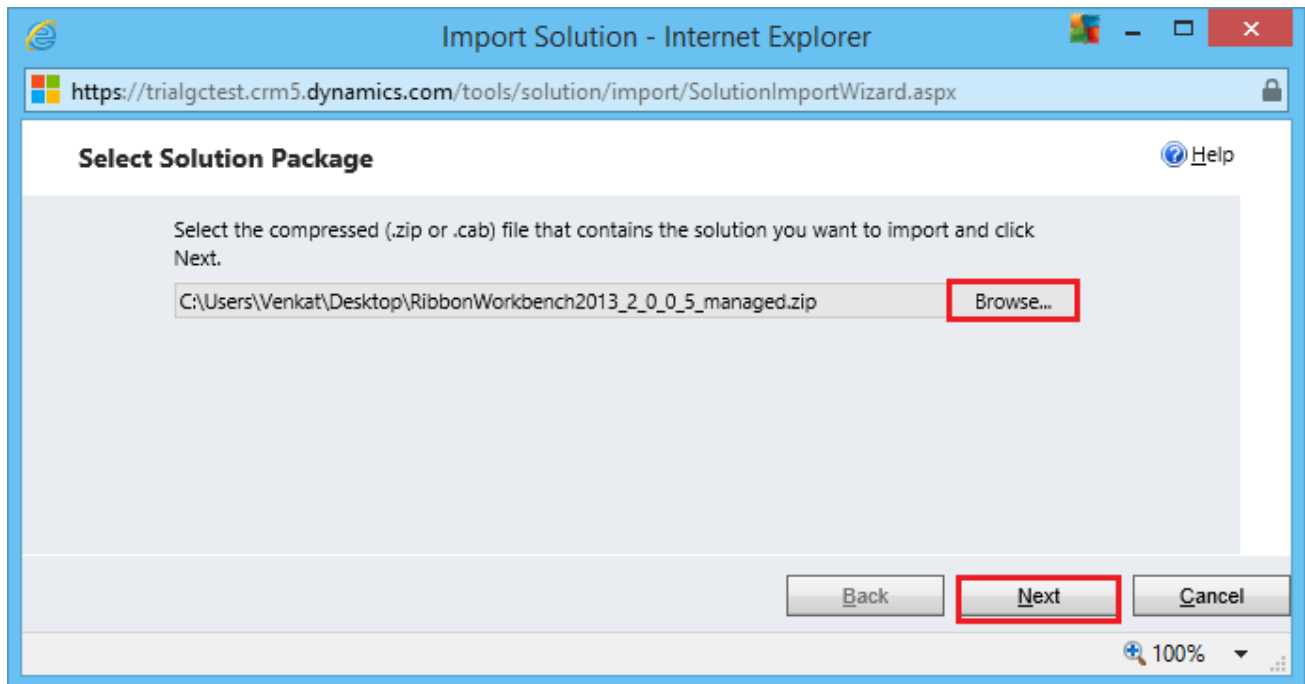


Figure 14: Solution import Ribbon Work

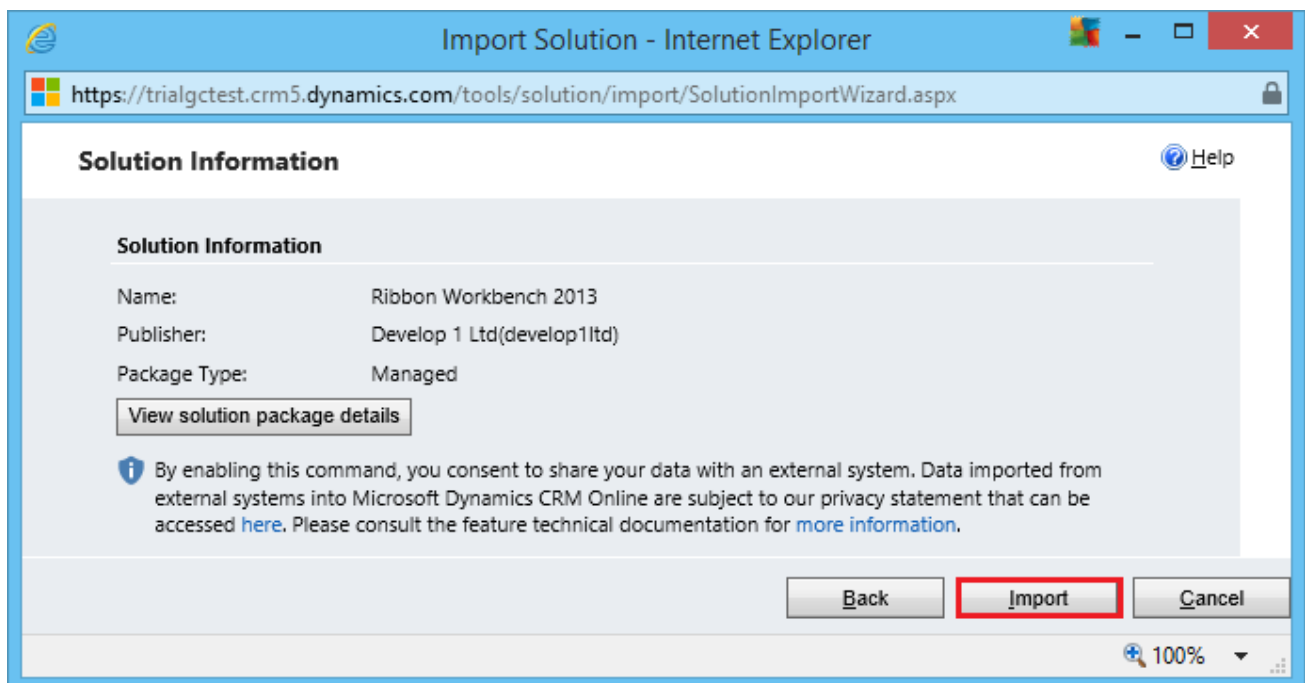


Figure 15: Solution information Ribbon Work

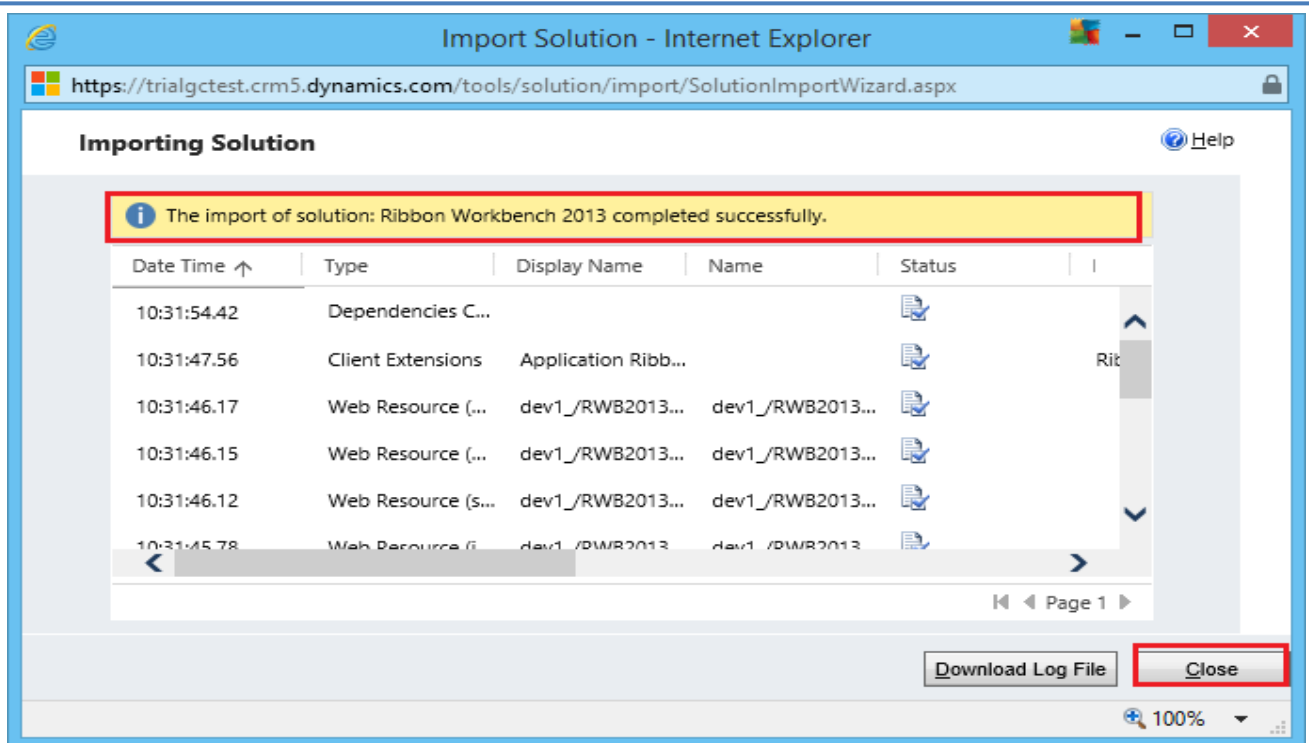


Figure 16: Solution import successful

- Create a new solution and add the entity from which Group Calendar should be launched.

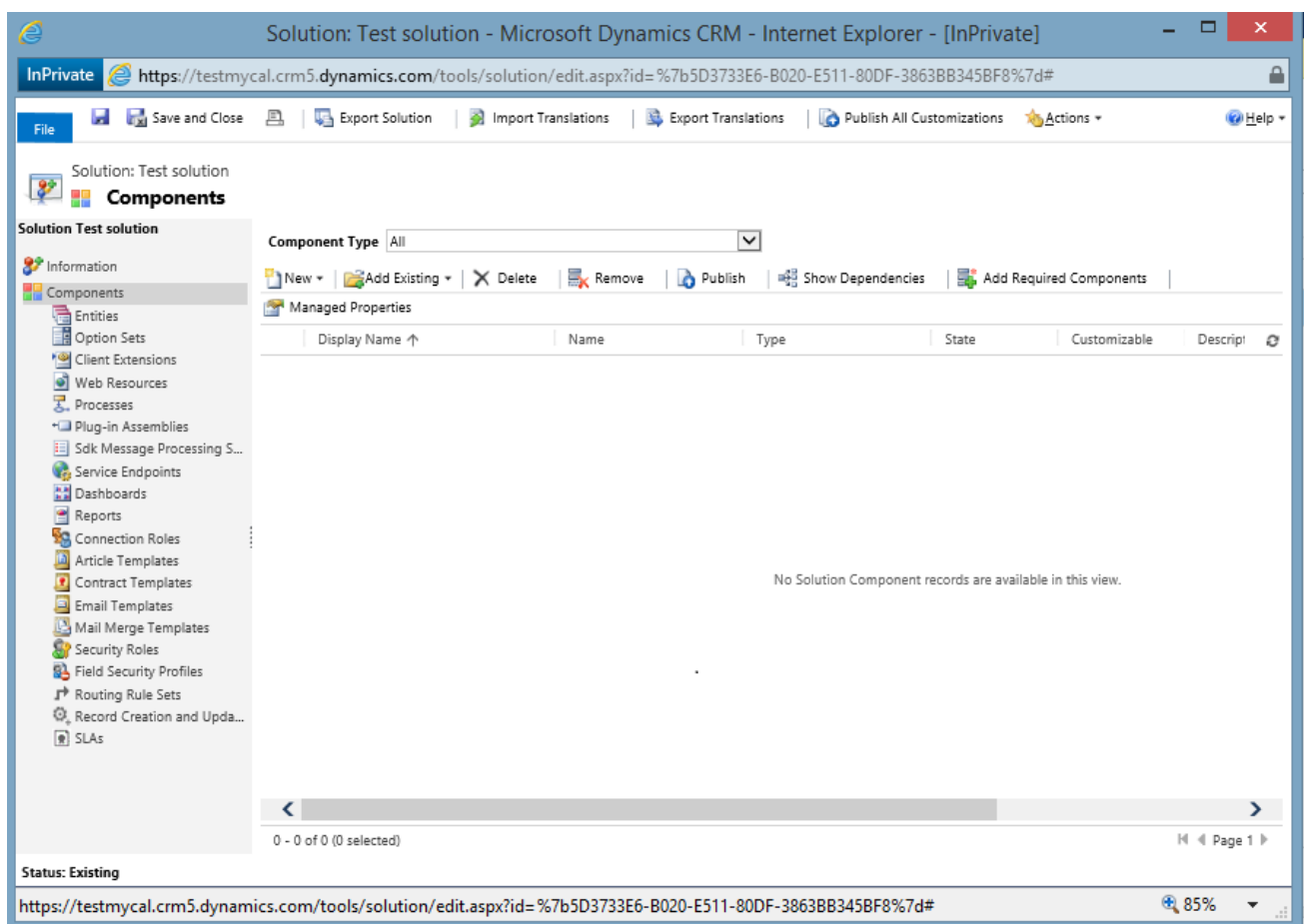


Figure 17: New Solution

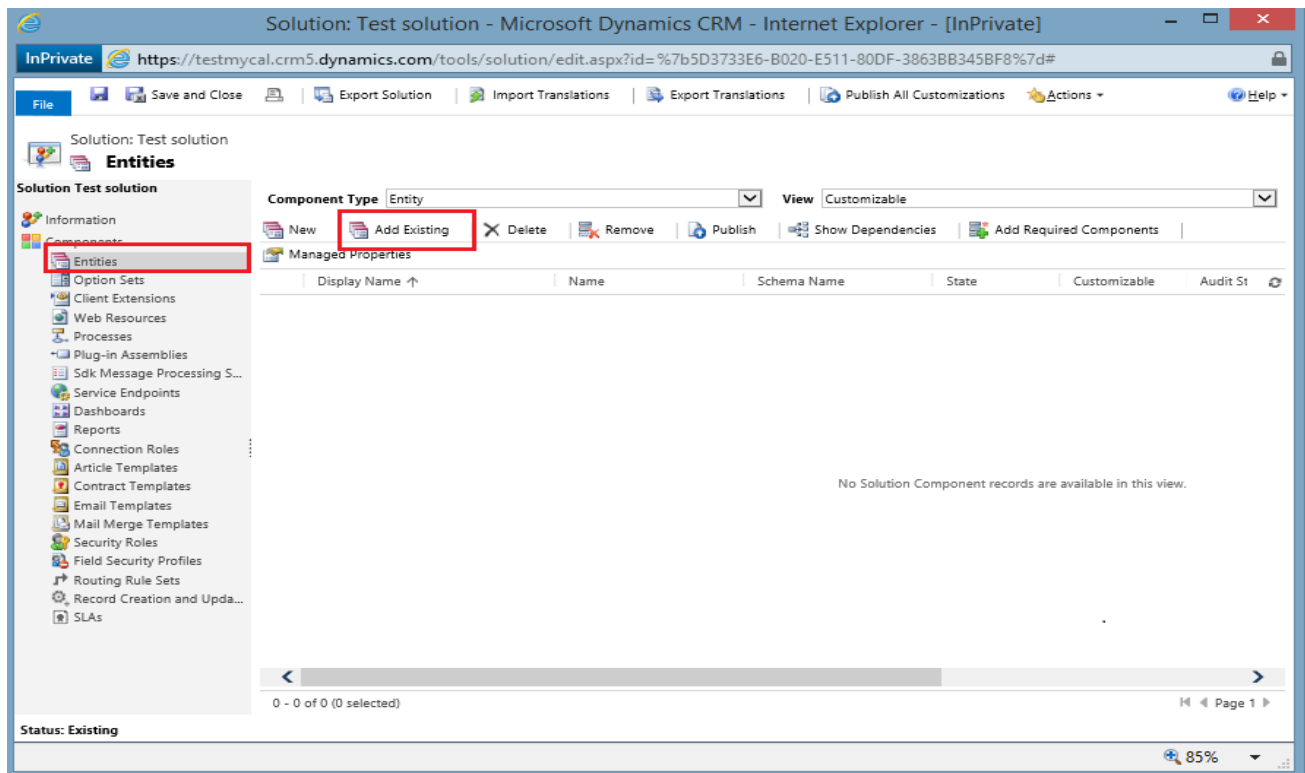


Figure 18: New Solution Add Entity

- Here in this case as an example included "Lead".

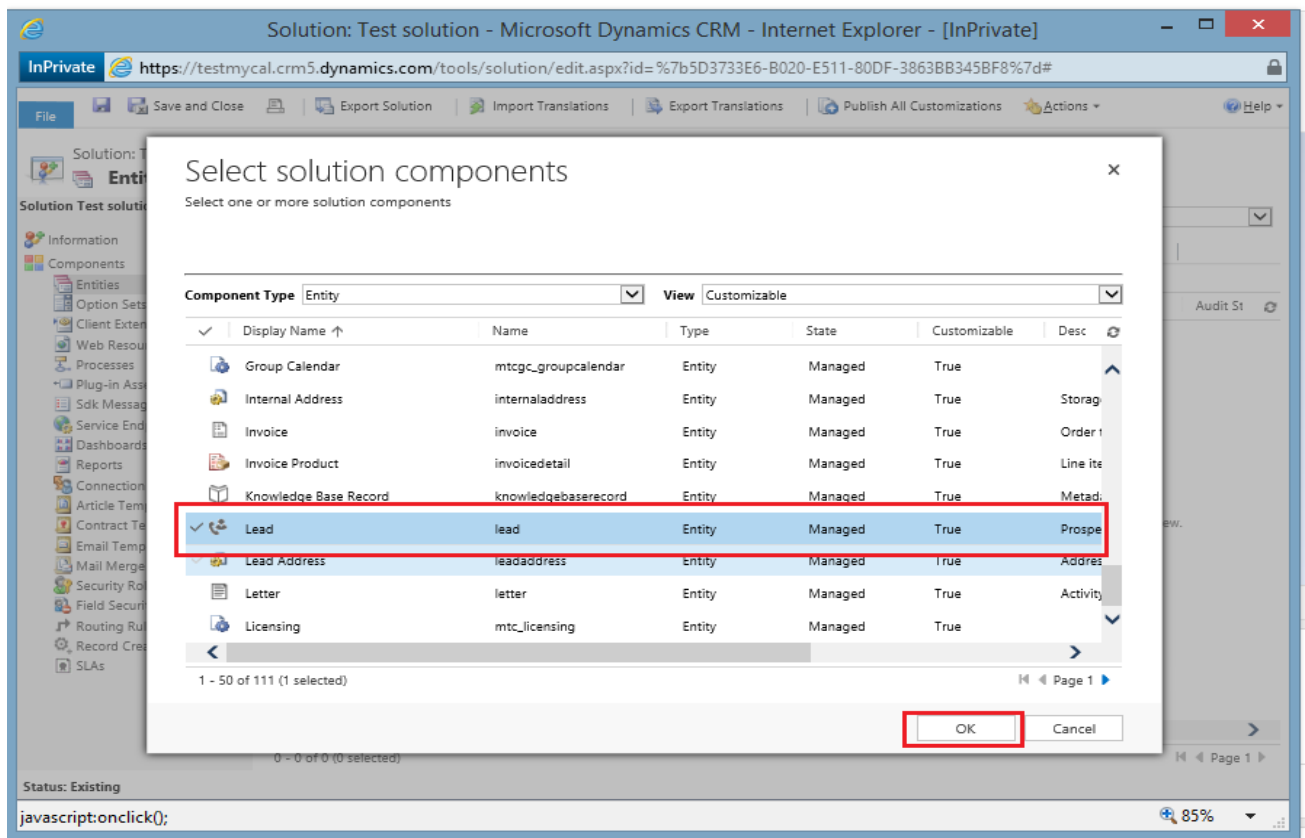


Figure 19: Select Solution Components

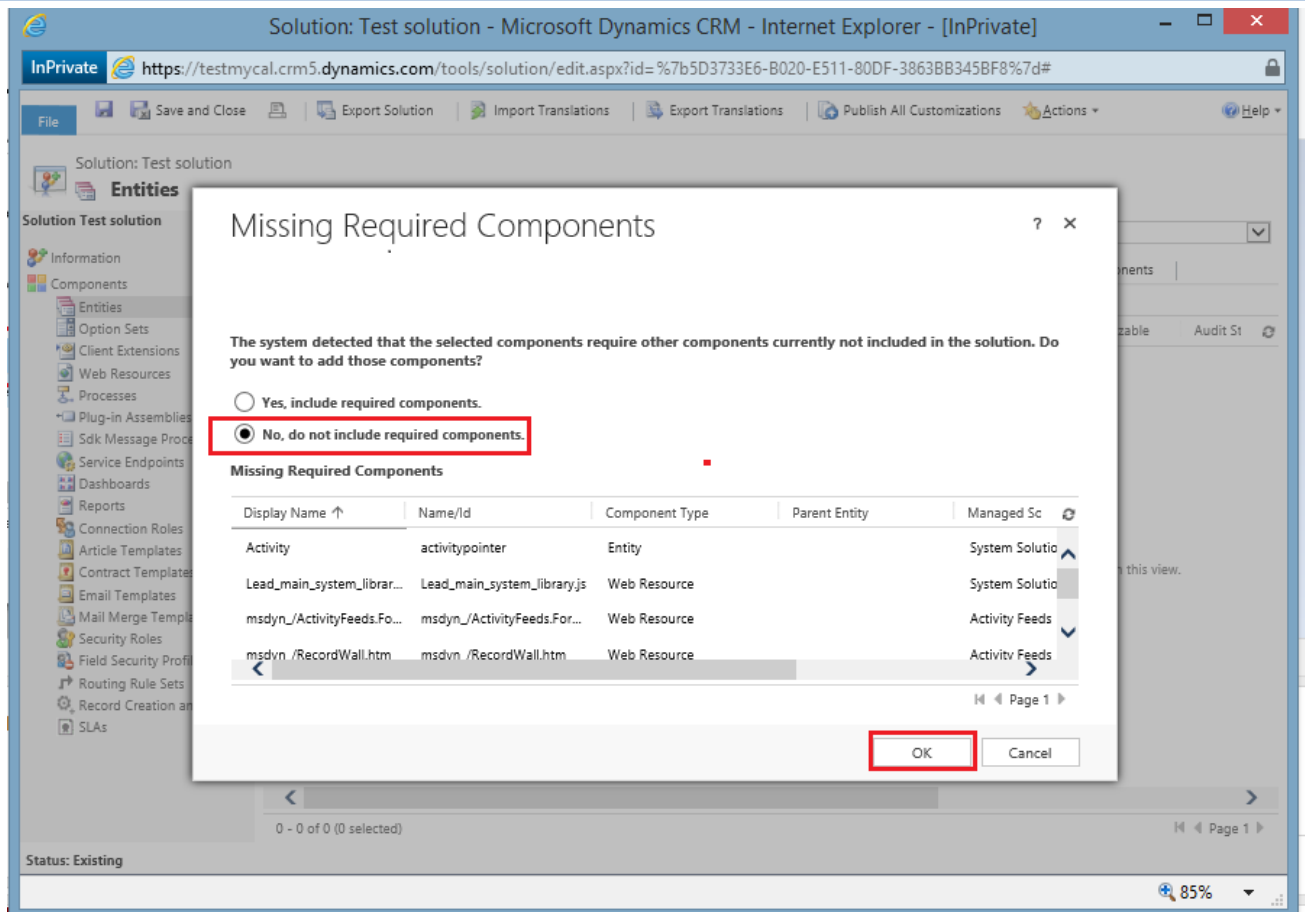


Figure 20: Select Missing Req. Components

- Write a JavaScript function to open Group Calendar and add that script file to the web resource of new solution

```
function OpenCalendar(context) {
var url=Xrm.Page.context.getClientUrl() +
"/WebResources/mtcgc_/GroupCalendar/Html/GroupCalenderScreen.Html?data=7$fullscreen"
window.open(url, "_blank", "toolbar=yes, scrollbars=yes, resizable=yes,width=1000, height=1200");
}
}
```

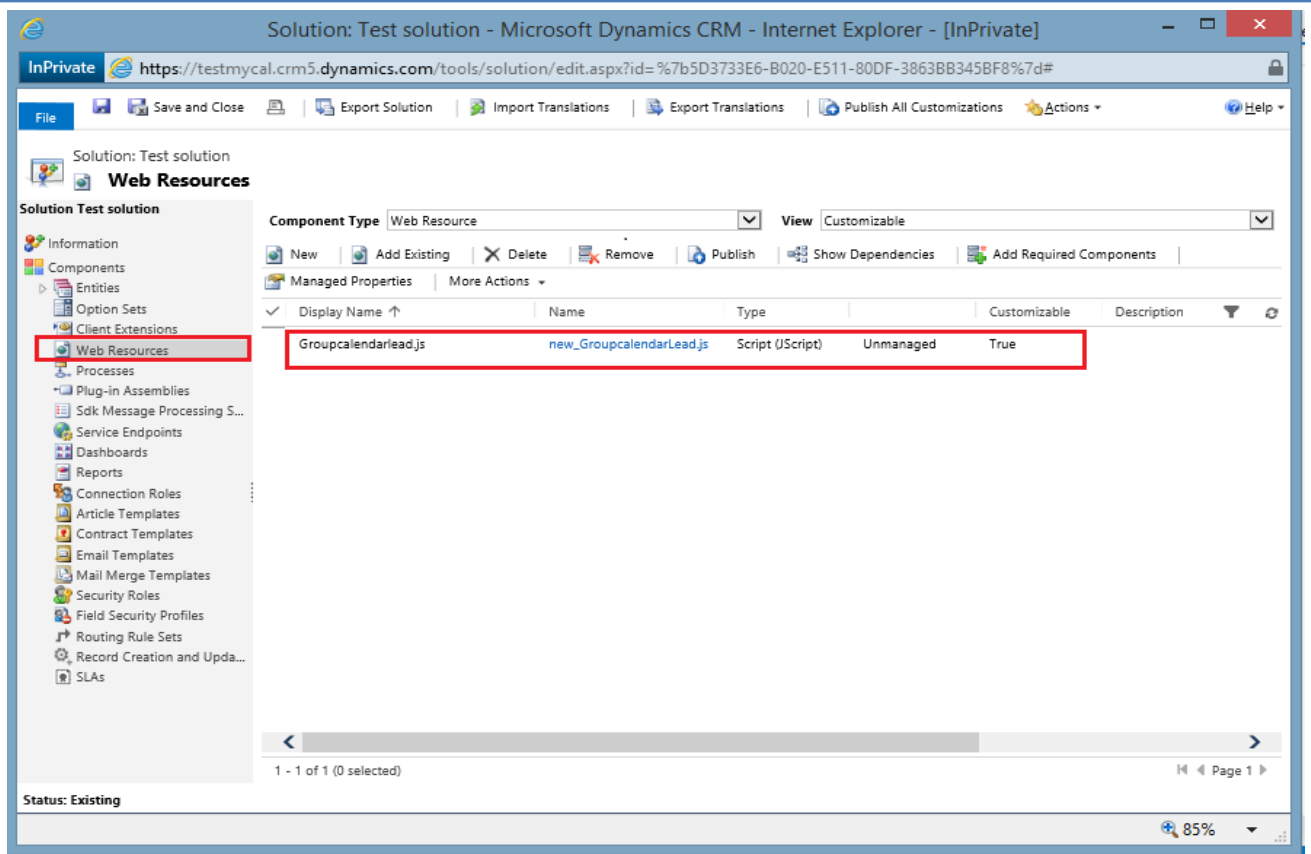


Figure 21: Solution Web resource

- Open Ribbonworkbench solution and choose the new solution that we created from the list.

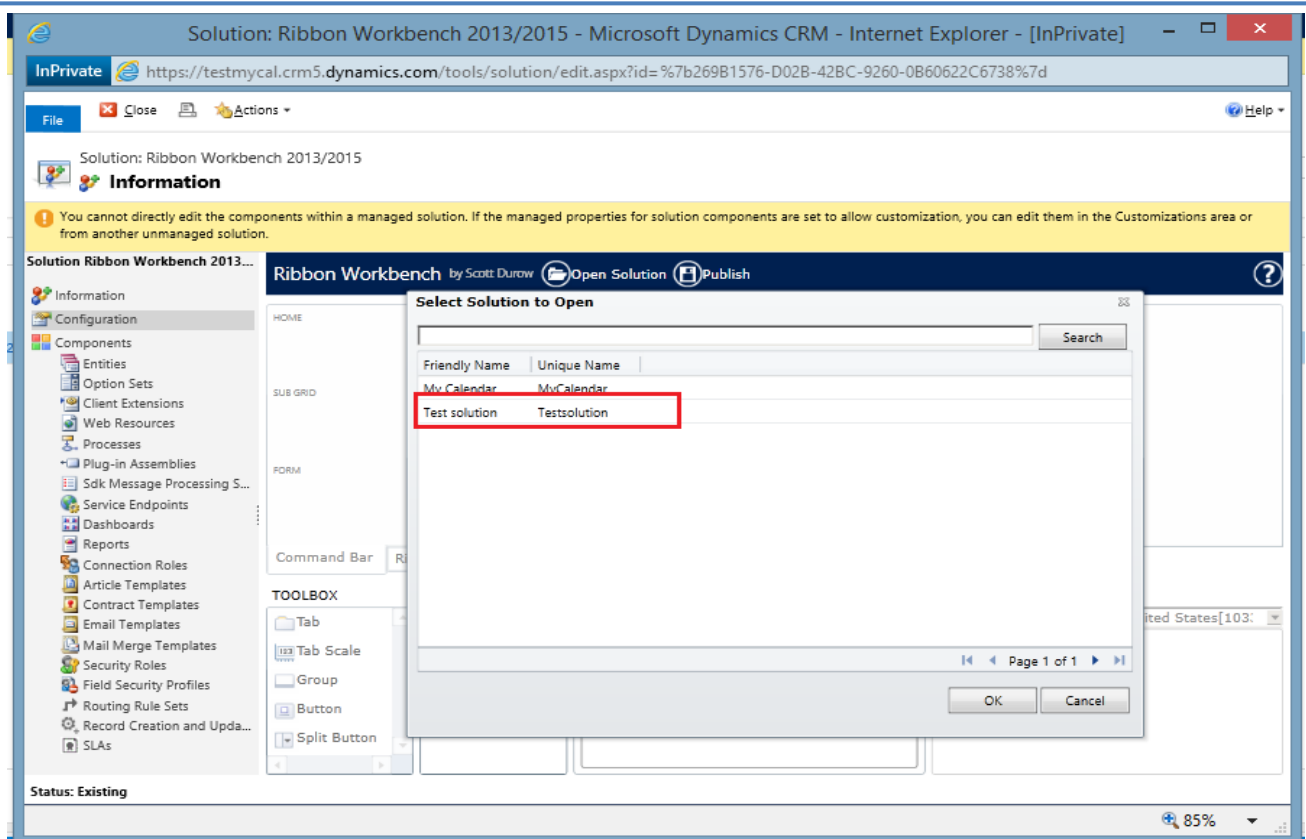


Figure 22: Open Ribbonworkbench

- Drag the button from the menu bar and paste in lead entity form ribbon
- Customize the button

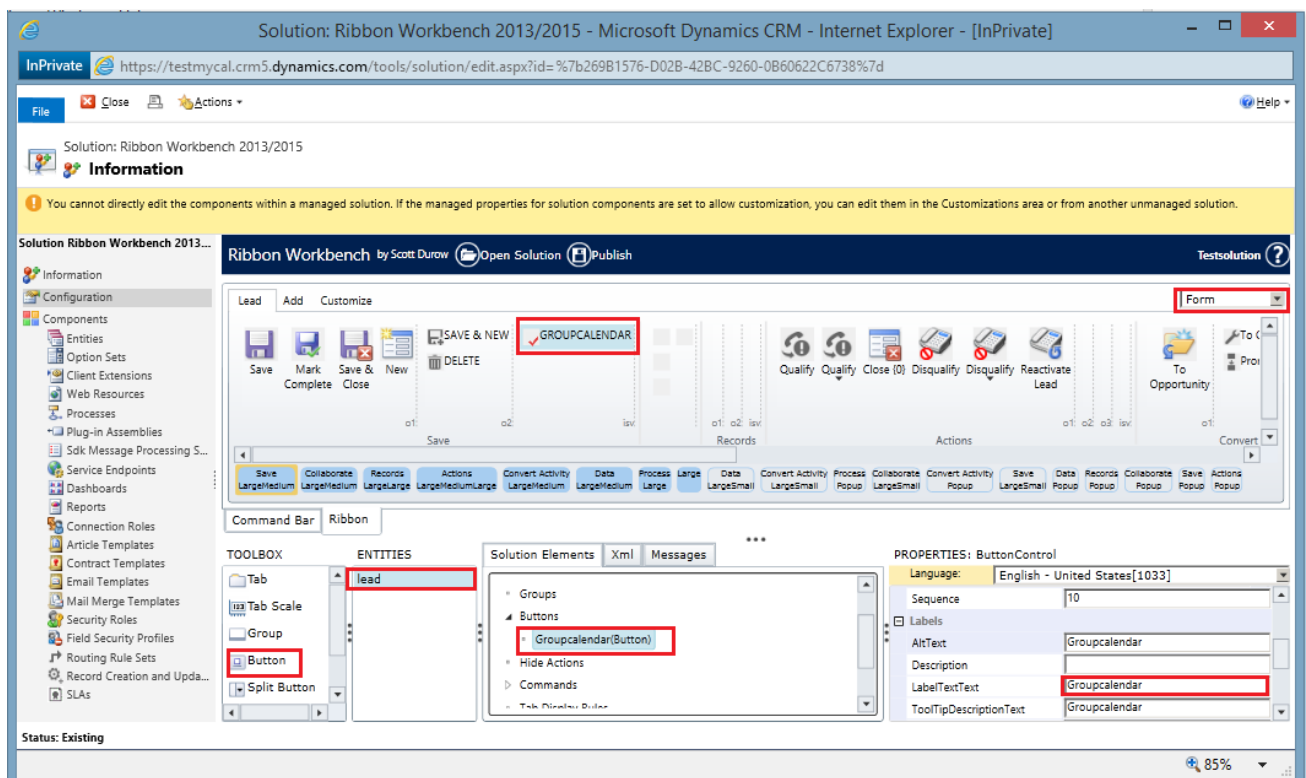


Figure 23: Customize the Button

- Create new command add action to that command.

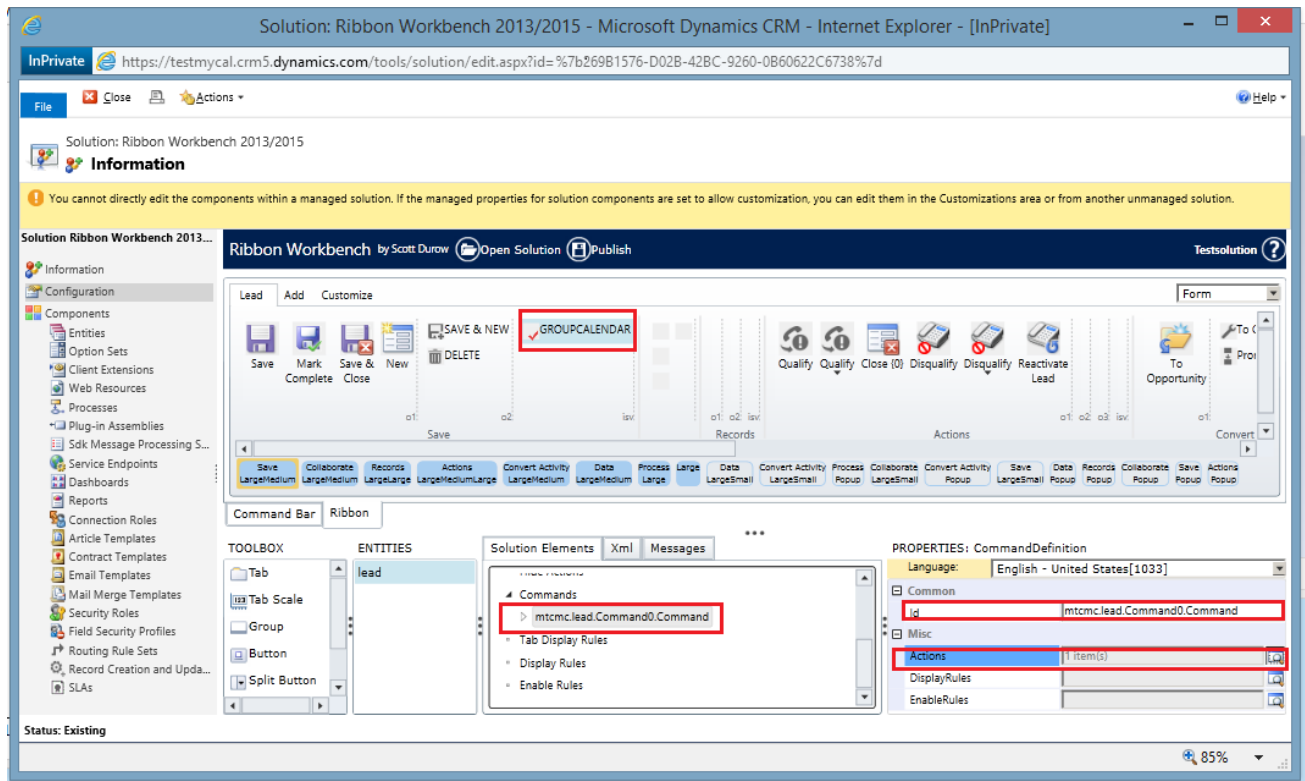


Figure 24: Add Action to Command

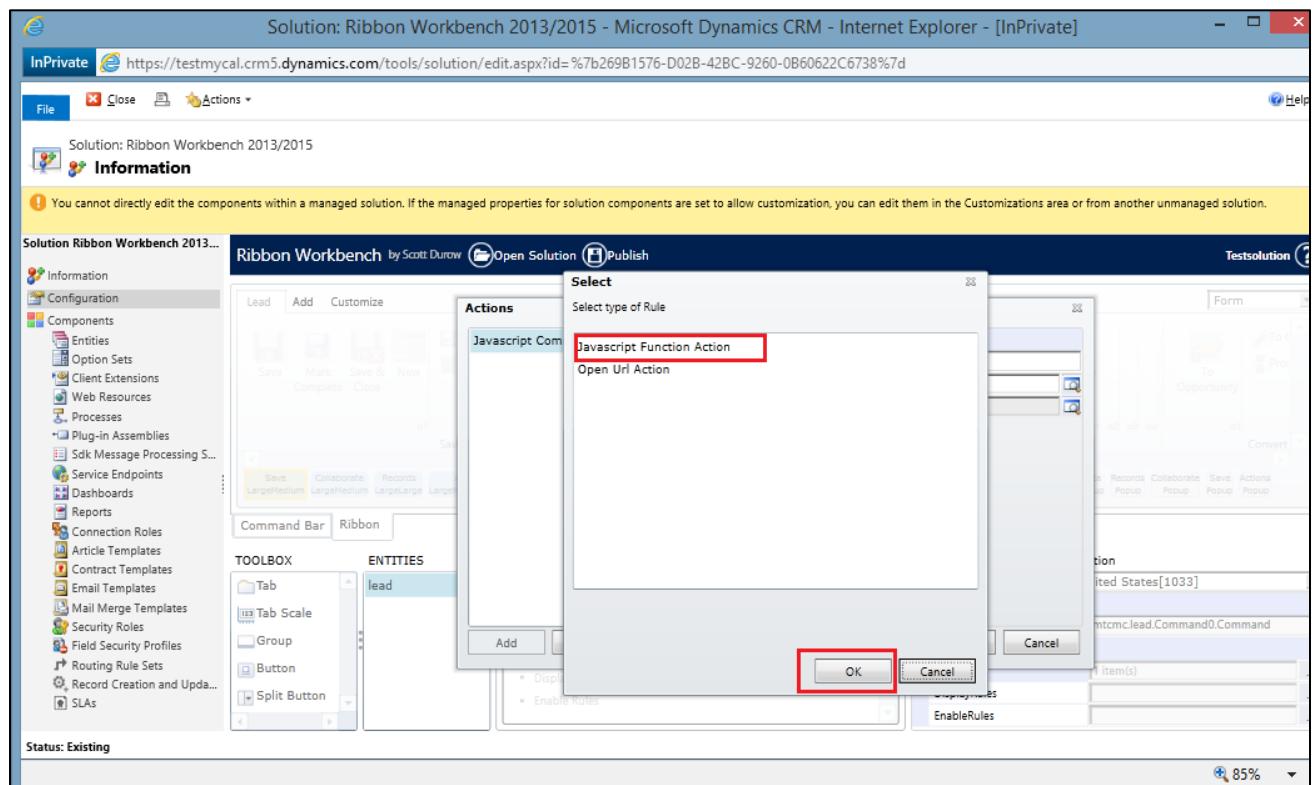


Figure 25: Add Action to Command... Contd

- Select JavaScript function action and click ok button

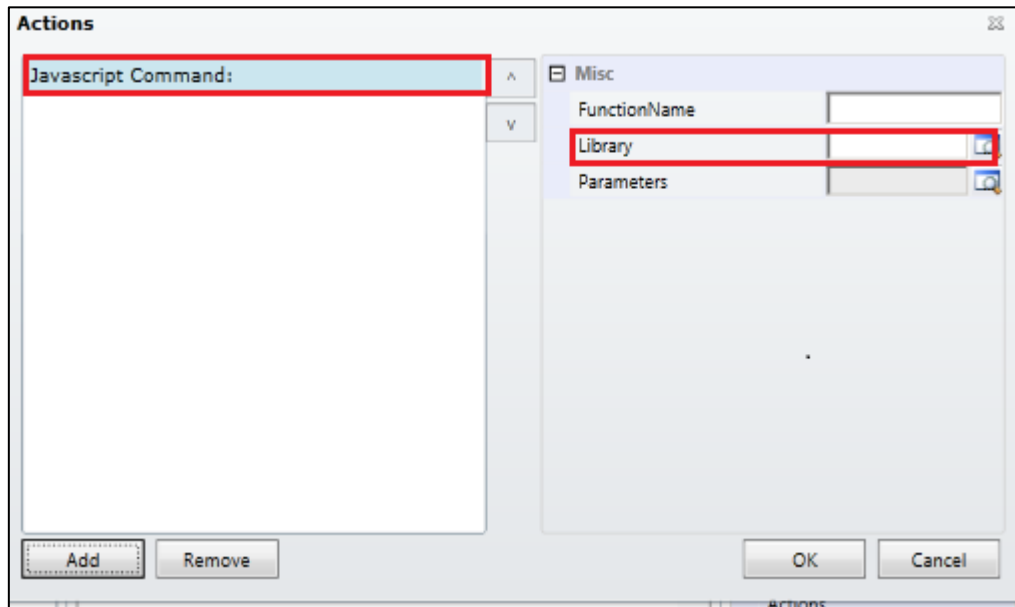


Figure 26: Select JavaScript function

- Choose JavaScript file to open Group Calendar from web resource.

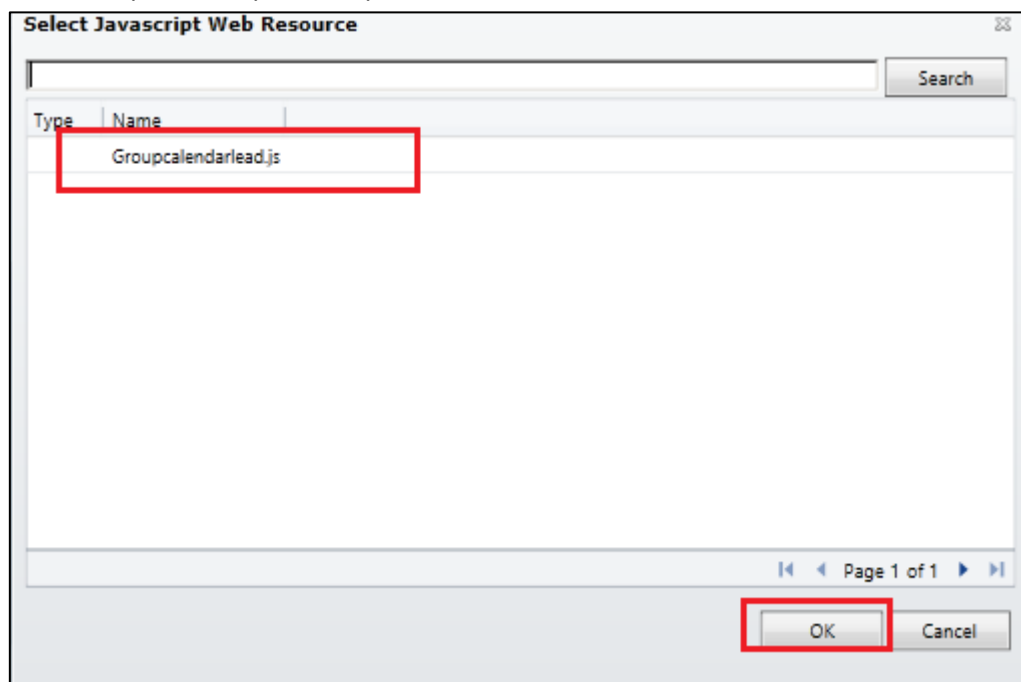


Figure 27: Choose JavaScript function to open Group Calendar

- Give the JavaScript function name in Function name textbox and click ok button

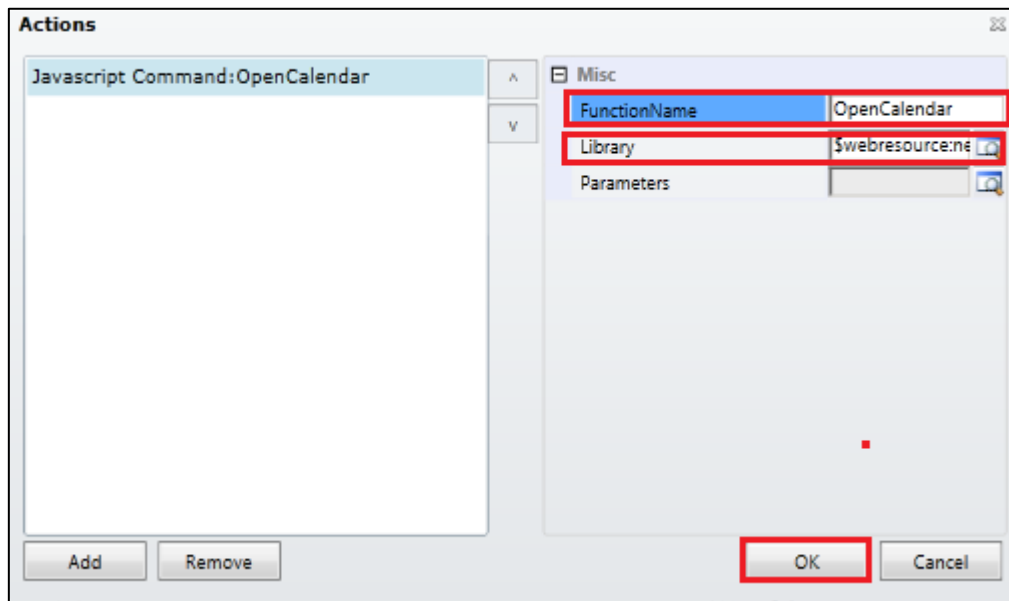


Figure 28: JavaScript function name

- Add the newly created command to the Group Calendar button and publish the solution

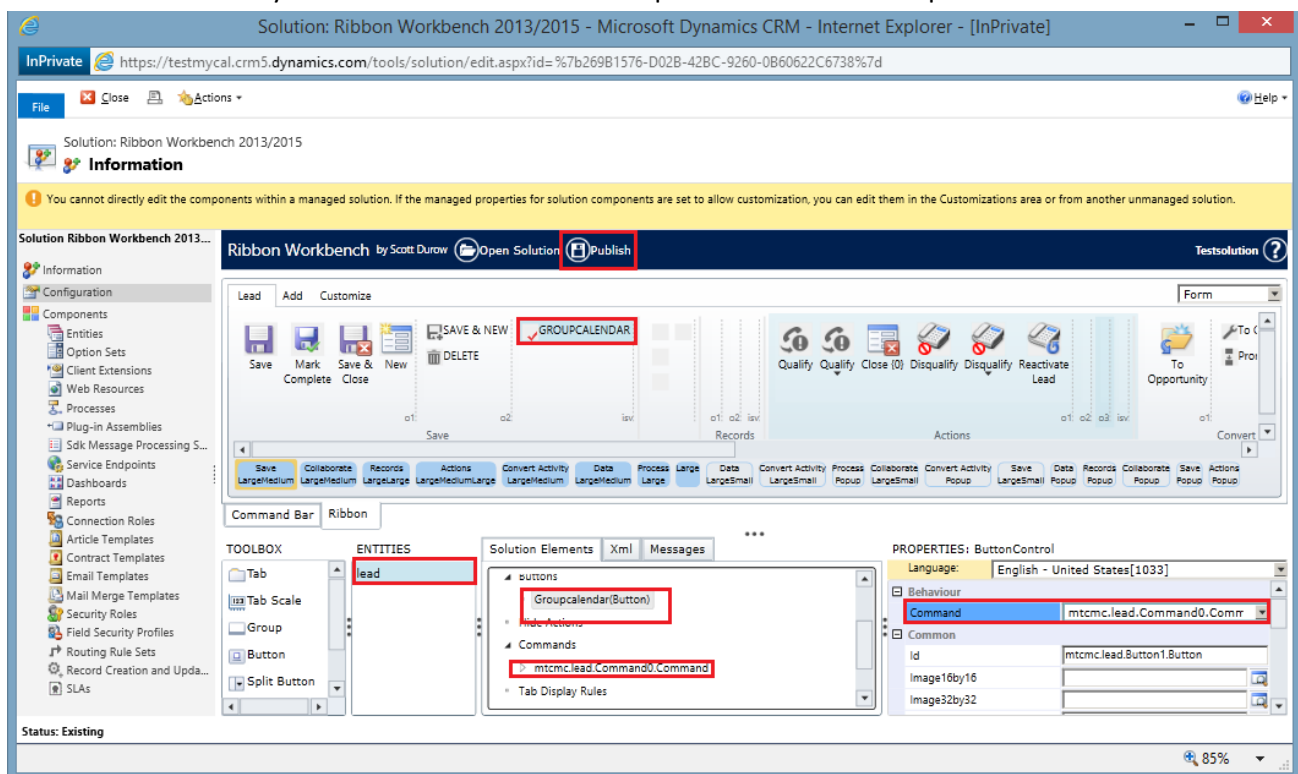


Figure 29: Solution information

- Refresh the CRM and open any lead record

Microsoft Dynamics CRM

Sales Leads Yvonne McKay (sam... Search CRM data testmynamal test MTC

Enable Server-Based SharePoint Integration Enable Now

GROUPCALENDAR + NEW DELETE QUALIFY DISQUALIFY ADD TO MARKETING LIST ASSIGN ***

LEAD Yvonne McKay (sample)

Lead Source Advertisement Rating Warm Status New Owner testmynamal test

Qualify (Active) Develop Propose Close Next Stage

Existing Contact? click to enter Existing Account? click to enter Purchase Timeframe click to enter

Estimated Budget click to enter Purchase Process click to enter Identify Decision Maker mark complete

Capture Summary click to enter

Summary

CONTACT

Topic New store opened this year - follow up (sample)

Name Yvonne McKay (sample)

Job Title Purchasing Manager

Business Phone 555-0146

Mobile Phone --

Email someone1@example.com

COMPANY

Company Fourth Coffee (sample)

Website http://www.fourthcoffee.com/

Address 789 Jones Blvd
La Vergne, TN 37332

POSTS ACTIVITIES NOTES

Enter post here POST

Both Auto posts User posts

Yvonne McKay (sample)

testmynamal test created Yvonne McKay (sample)

On Yvonne McKay (sample)'s wall

6/16/2015 12:27 AM

STAKEHOLDERS

Name Role

No stakeholders found.

COMPETITORS

Name Website

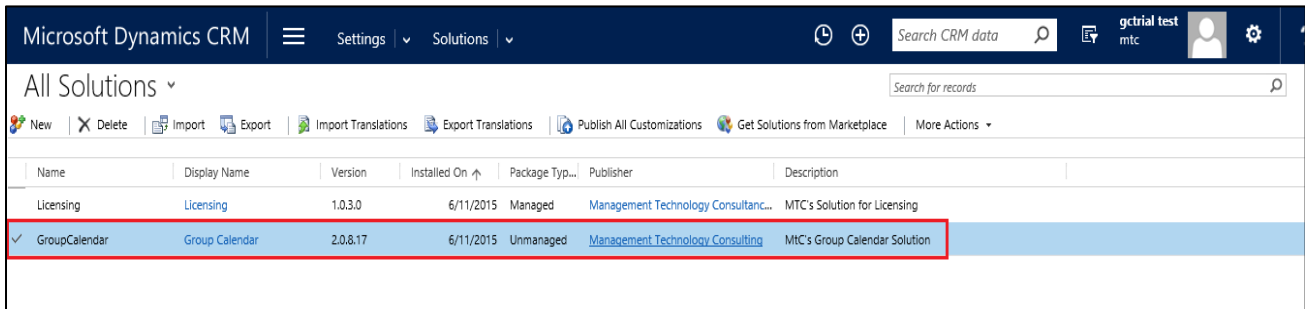
Open

Figure 30: CRM Lead form

- Click on Group Calendar button and Group Calendar will open in new window

Group Calendar Settings

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



Microsoft Dynamics CRM

Settings Solutions

Search CRM data

gctrial test mtc

All Solutions

Search for records

New Delete Import Export Import Translations Export Translations Publish All Customizations Get Solutions from Marketplace More Actions

Name	Display Name	Version	Installed On	Package Type	Publisher	Description
Licensing	Licensing	1.0.3.0	6/11/2015	Managed	Management Technology Consultanc...	MTC's Solution for Licensing
GroupCalendar	Group Calendar	2.0.8.17	6/11/2015	Unmanaged	Management Technology Consulting	MTC's Group Calendar Solution

- Double click on Group Calendar Solution , which opens a new screen as shown below

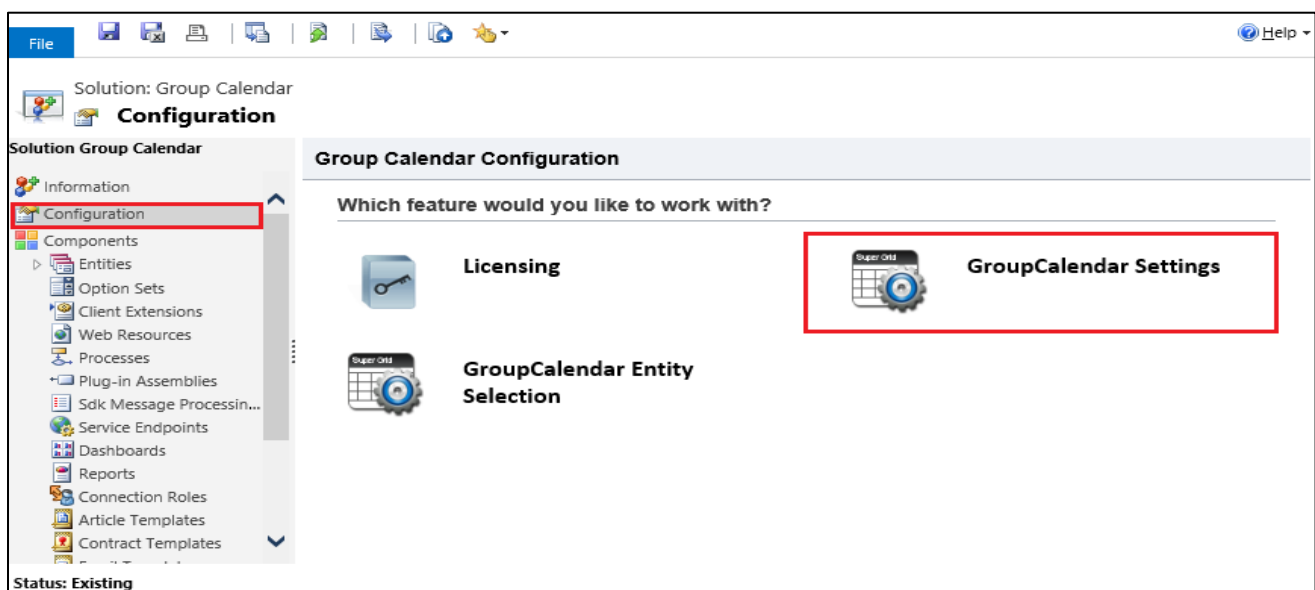


Figure 31: Configuration Screen

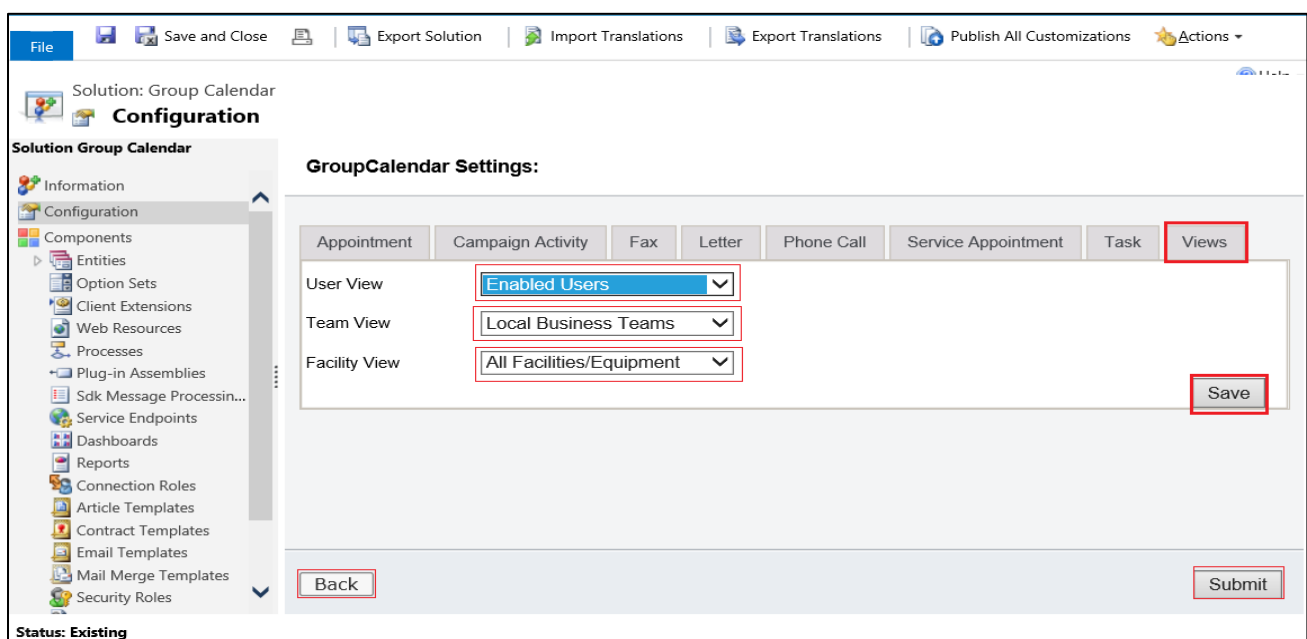
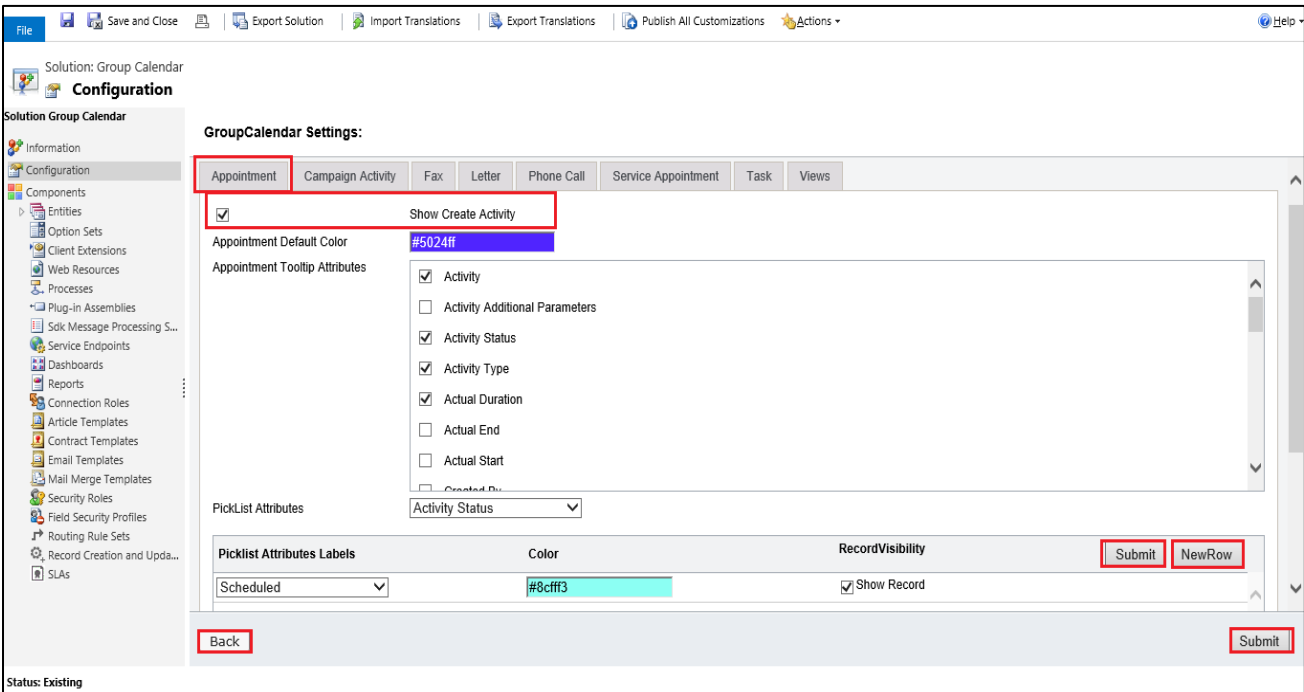


Figure 32: Calendar Setting - Views

- 'Views' in calendar settings area for select User views, team views and facility views.
- If we select any user view users in that view will be show in calendar same in the case of team and facility.
- All the Views such as User, Team and Facility have the drop down options to select any of your choice



GroupCalendar Settings:

Appointment | Campaign Activity | Fax | Letter | Phone Call | Service Appointment | Task | Views

☒ Show Create Activity

Appointment Default Color: #5024ff

Appointment Tooltip Attributes:

- ☒ Activity
- ☐ Activity Additional Parameters
- ☒ Activity Status
- ☒ Activity Type
- ☒ Actual Duration
- ☐ Actual End
- ☐ Actual Start
- ☐ Created On

PickList Attributes: Activity Status

Picklist Attributes Labels	Color	RecordVisibility
Scheduled	#8cfff3	<input checked="" type="checkbox"/> Show Record

Buttons: Back, Submit, NewRow

Status: Existing

Figure 33: Show Create Activity

There is 'show create activity' check box in each activity setting area, put 'show create activity' checkbox as checked and save settings then activities will appear in right click menu [right click on group calendar screen to create new activities].

- Your choice of Activity can be selected by clicking on the Show Create Activity Tab as shown above
- Activity Color – User can select his/her personal choice of colors for every activities (one or more colors as shown above)
- Tooltip Attributes – User can select the one or more Attributes for which he/she need the tool tips for display purpose.
- Pick list Attributes can be selected from the Drop down list provided
- Pick list Attribute Labels can be added with choice of Color along with display of its record visibility.
- Once selected, Click on Submit to continue or Click Back to go back to Settings menu

Group Calendar Entity Selection

- Facility to choose different color for record based on pick list attribute values.
- Open CRM go to Solutions, Double Click on Group Calendar Solution
- Select Configuration section on the pop up screen as shown below

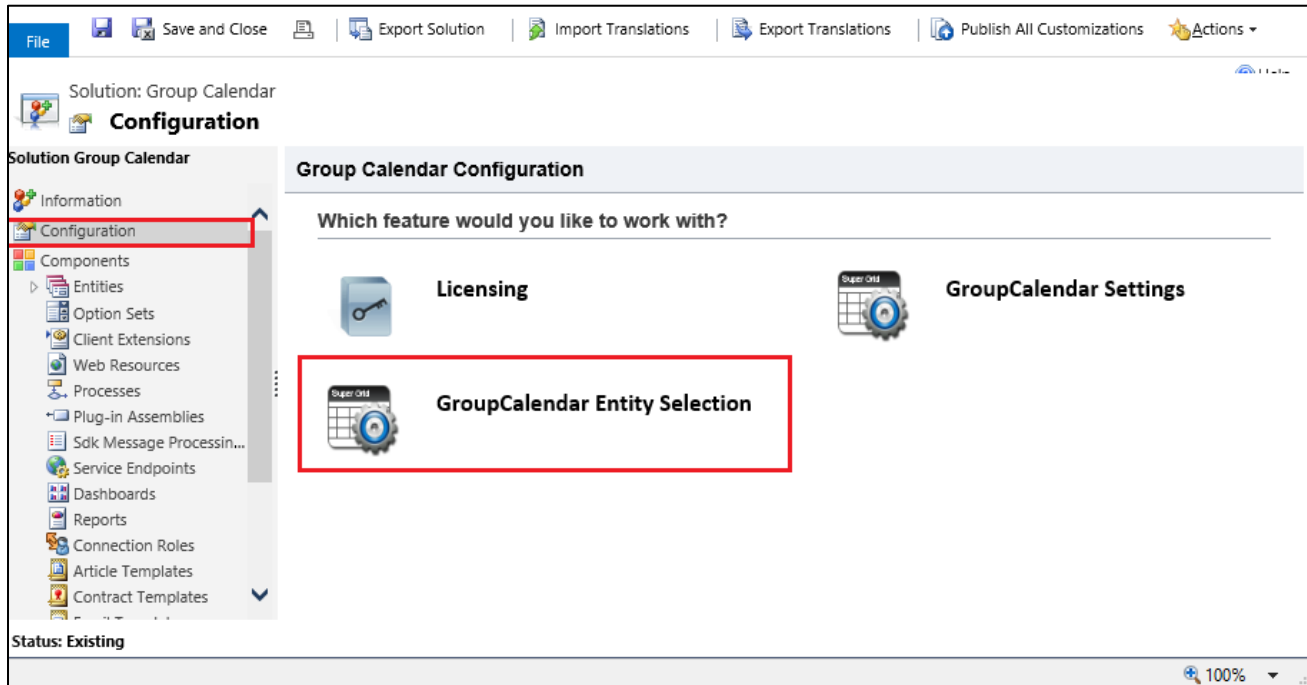


Figure 34: Configuration Screen

- Click on Group Calendar Entity Solution to open one more pop up screen as shown below.
- User can select the entity, color and tooltip attributes.
- That entity records also visible in calendar.

Custom Entity

Entity Name :

Start Date :

End Date :

Display Text :

Attributes :

- ☐ Classification
- ☒ Account
- ☐ Account Number

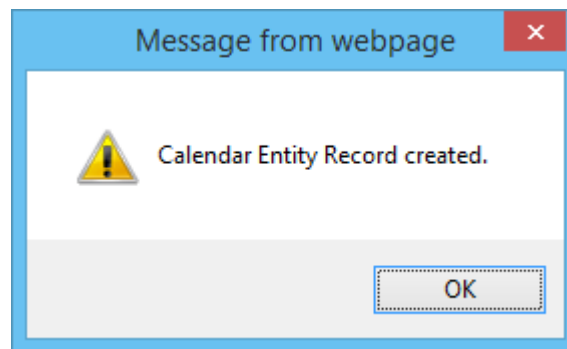
PickList Attributes :

PickList Attribute Labels	Color	Record Visibility
Preferred Customer	#66ff00	<input checked="" type="checkbox"/> Show Record
Standard	#ff4b1f	<input checked="" type="checkbox"/> Show Record

Buttons: Back, Submit, NewRow, Delete Settings, Submit

Figure 35: Group Calendar Entity Selection

- Select Entity Name from the Drop down list provided
- Select Start date & End date separately from the drop down list
- Select the Display text from the drop down list
- Select the Check box in the Attributes to get tool tip help for the selected entities
- On the Color, click to change to get desired color for the Entity display.
- In Pick list Attribute labels area, user can add attributes by clicking on New Row tab provided.
- Finally click on Submit button (placed on the right bottom corner) to execute.
- On successful submit a new pop up displays the following message.



Group Calendar Functionality

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

- Only registered Users or internal users in the CRM will & can have Group Calendar facility
- Single or multiple user facility is available in Group Calendar

Open CRM Go to **Workplace->**

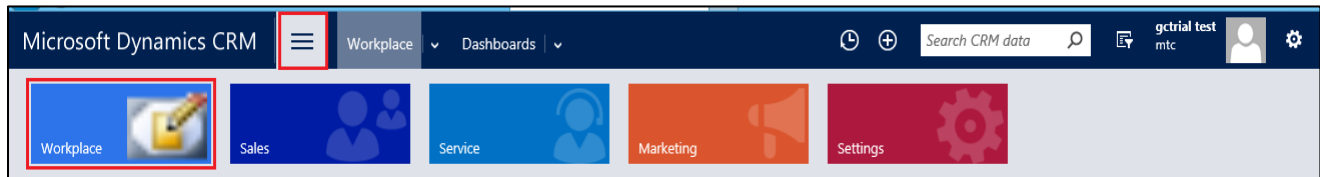


Figure 36: CRM Dashboard

Go to **Group Calendar** to view existing calendar as shown below

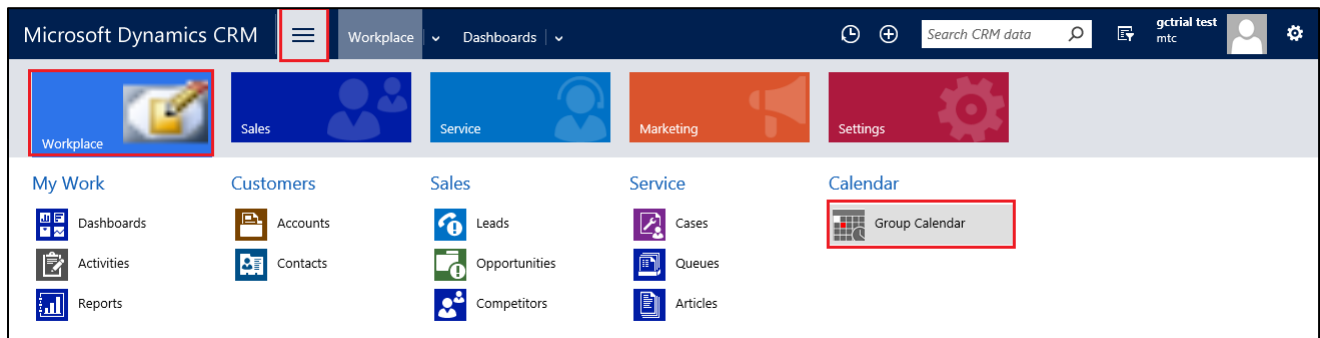


Figure 37: CRM Dashboard... cont.

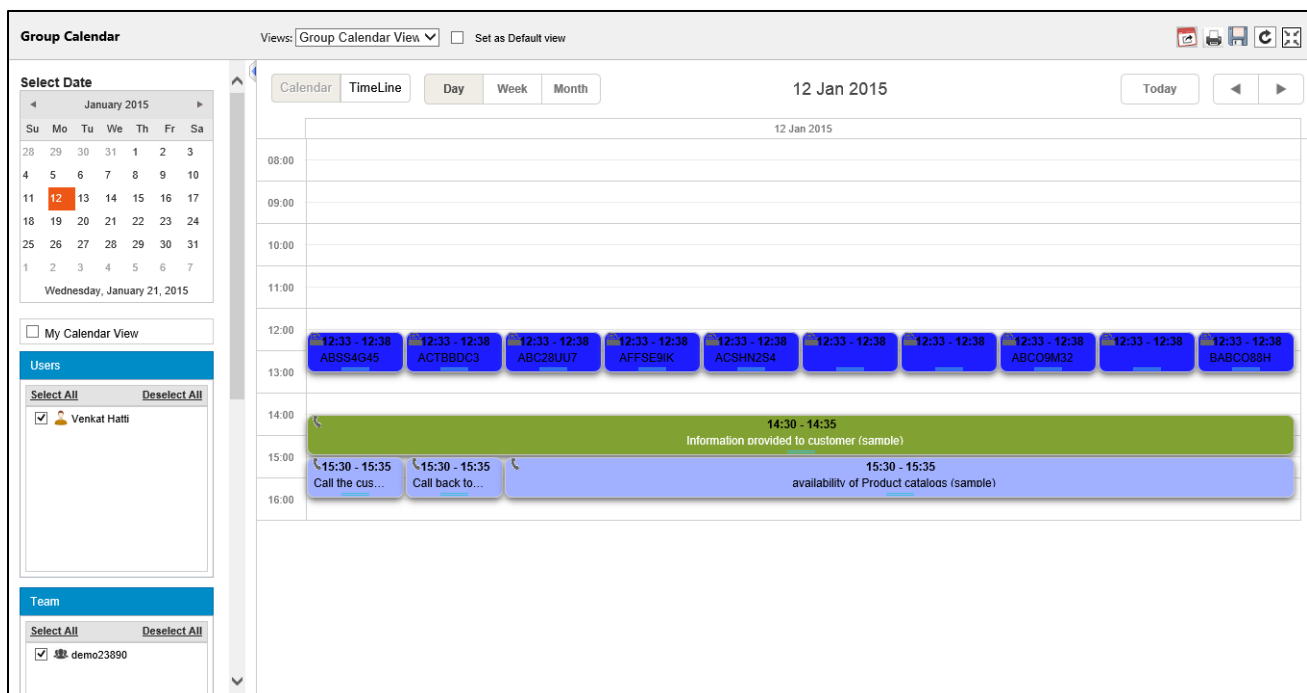


Figure 38: Calendar view - CRM

- The working pane has Date Calendar on top, User list in the middle and Activities list at the bottom.
- The right side of screen displays the Calendar with activities details
- To View the Calendar Select the Users from the User list by selecting the check box
- Only the users in the CRM are listed in this list
- In the above screen both the users have been selected hence all their tasks are displayed
- To create a new Activity, double click on the date
- New pop up window opens as shown below
- Select the Activity from the drop down list and click on Create Activity
- To move the Activity just Drag and Drop it in the required place

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 Group Calendar.

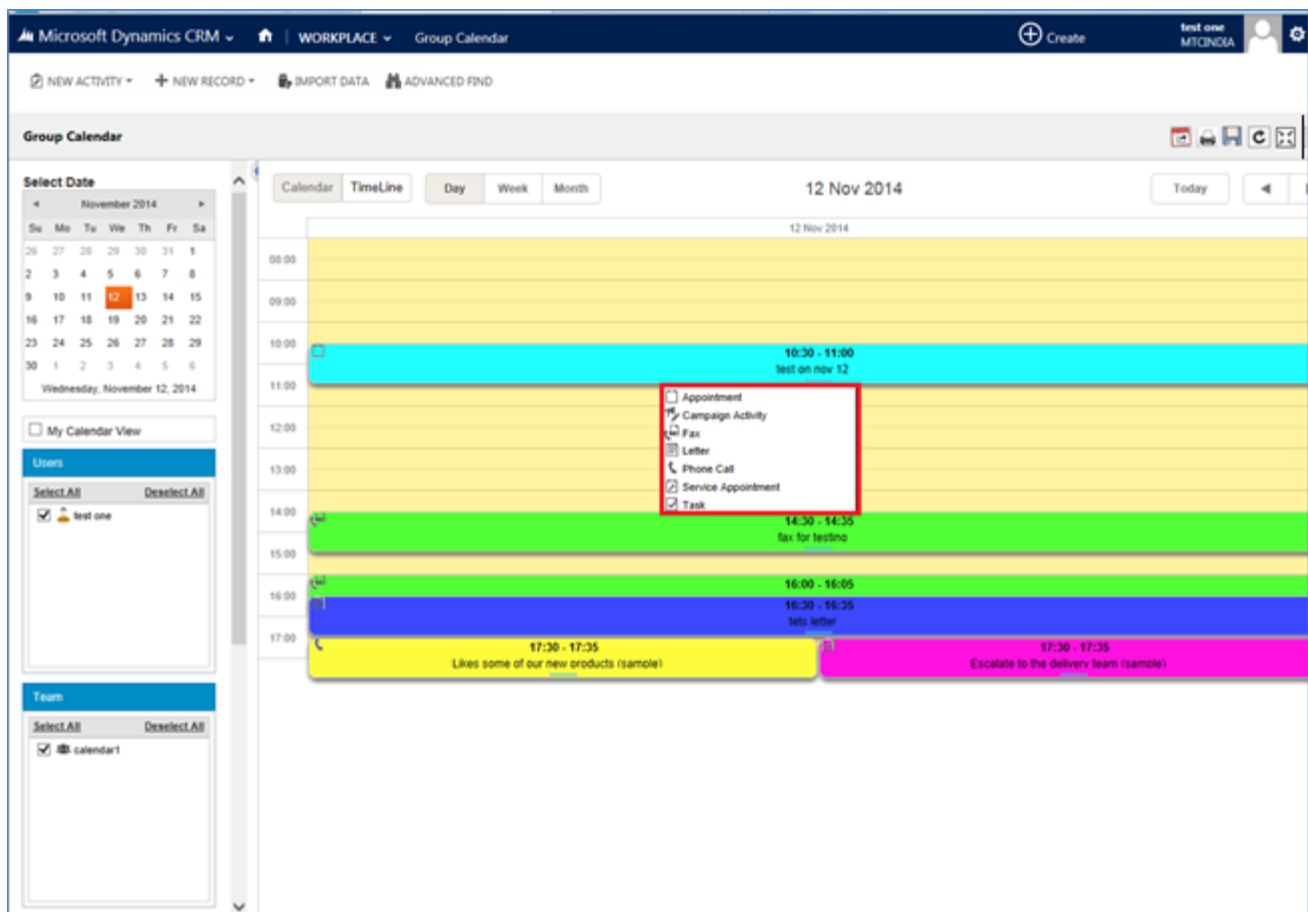


Figure 39: Create Activity

- 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 from the left pane
- Calendar Date
- If the user is interested in his own calendar then select My Calendar View
- If the user wishes to view Individual user(s) then select the users as shown below
- If the user wishes to see the team calendar then select team from the list

January 2015

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Wednesday, January 21, 2015

☐ My Calendar View

Users

Select All

Deselect All

☒ MTC CRM
 ☒ Nitesh Agarwal

Team

Select All

Deselect All

☒ crm123

- If the user wishes to see the Facilities/Equipment from calendar then select team from the list
- Lastly select one or more Activities from the list to view calendar pertaining to your choice

Facilities/Equipment

Select All

Deselect All

Select Activities

Select All

Deselect All

☒ Appointment
 ☒ Campaign Activity
 ☒ Fax
 ☒ Letter
 ☒ Phone Call
 ☒ Service Appointment
 ☒ Task

- Select Users – Either you can select one or more users or Select All or even Deselect all for easier selecting options. (as shown below)
- In Select Users: - if the user deselect all then a message is displayed as **“Select at least One User”**. Which mean at least one user has to be selected to view Group calendar.

Select at least one user

- Apart from Both Users and Team you can also check MY Calendar View to get your own calendar details.

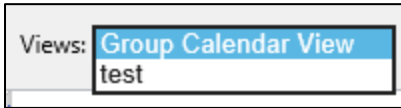
Views & Default View:

- Select the Check box to Set the Calendar for Default View

Views: Group Calendar View ▼

☐ Set as Default view

- Views have a Drop down list, click on the button will show user as under (if there are any stored views available)



- Apart from the regular Group Calendar View, if you select any other previously stored view (for example here test calendar) the User will have additional three more icons extra such as



Save as New file



Copy URL of the present calendar



To Delete View



Note: The top right corner of the CRM screen shows the following icons on regular view



This icon on top right is to save calendar view for example on click of this icon a small pop up display as



Where you can give the name and create it.



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



- This image indicates the Full screen functionality. By clicking on this button Group calendar functionality available in full screen mode.



This image indicates that the Calendar can be exported out of CRM



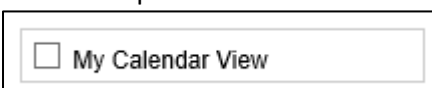
This image when clicked helps in taking the Printout (output) or Hard copy of the calendar

(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.


On the left pane below the actual calendar you will notice the following



All Activities shown in Green color indicates that a particular activity is Closed or Finished

Working Hours

To set the working hours for users, you need to define the working hours as shown below

- Click on  which is placed on Right side of the Menu bar.
- Click on Option to get Set Personal Options pop up window.
- Select Activities tab

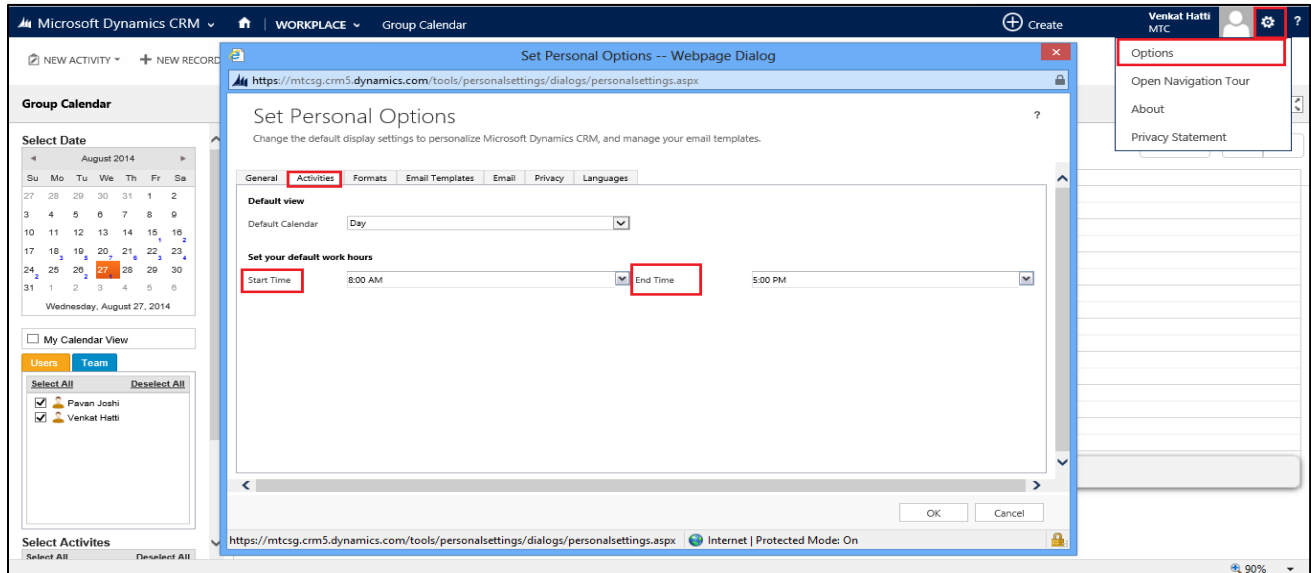
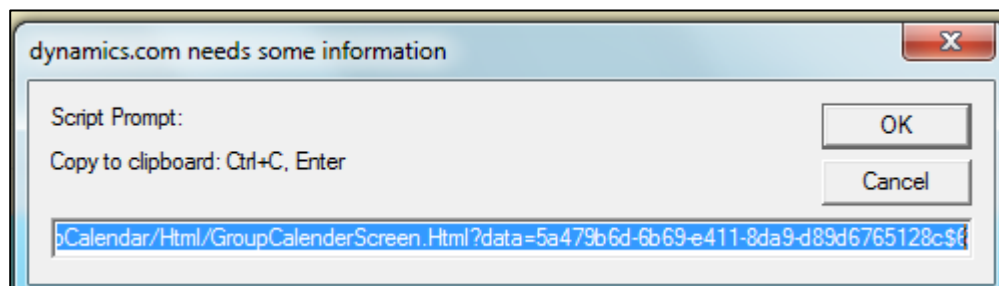


Figure 40: How to Set Working Hours

- Default Calendar: Select Day, Week or Month
- Start Time and End time: Select from the Drop down list provided
- Finally Press Ok to Confirm and Continue



My Calendar View

- On Selecting My calendar- the calendar is restricted to single user (the one on whose credentials the user has logged in). Select Users Options gets disabled. Otherwise the user can see activities for all the users.

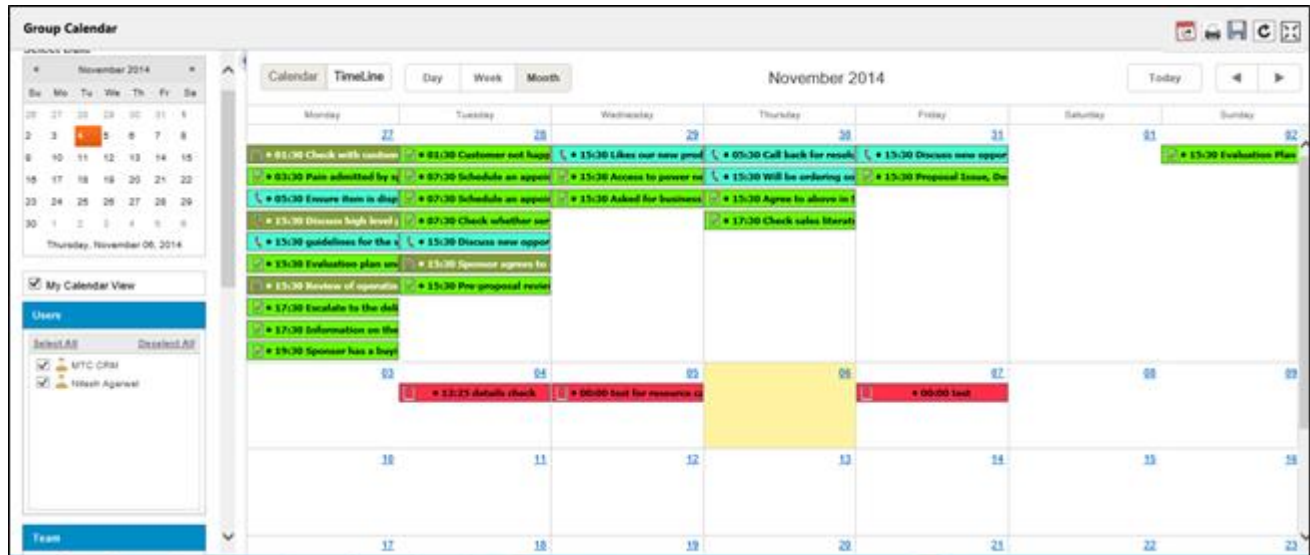


Figure 41: My Calendar View

Calendar View - Monthly (Single User)

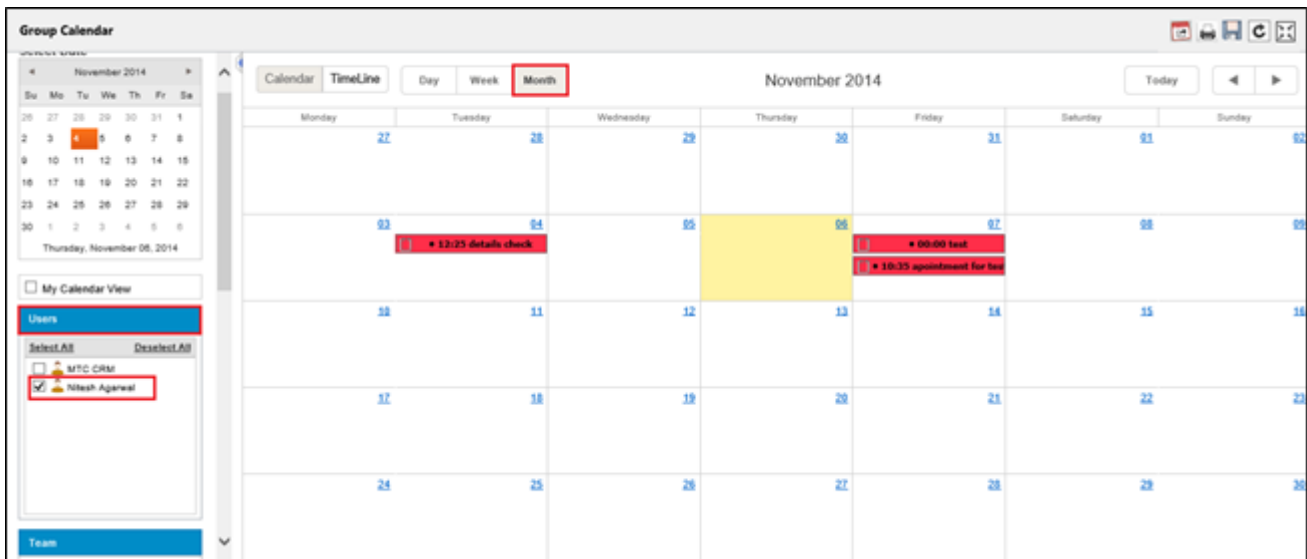


Figure 42: Calendar View - Monthly (Single User)

- Only One user is selected in the above view
- Monthly details of all Activities are displayed for a Single User
- All Activities shown in Green color indicates that a particular activity is Closed or Finished.

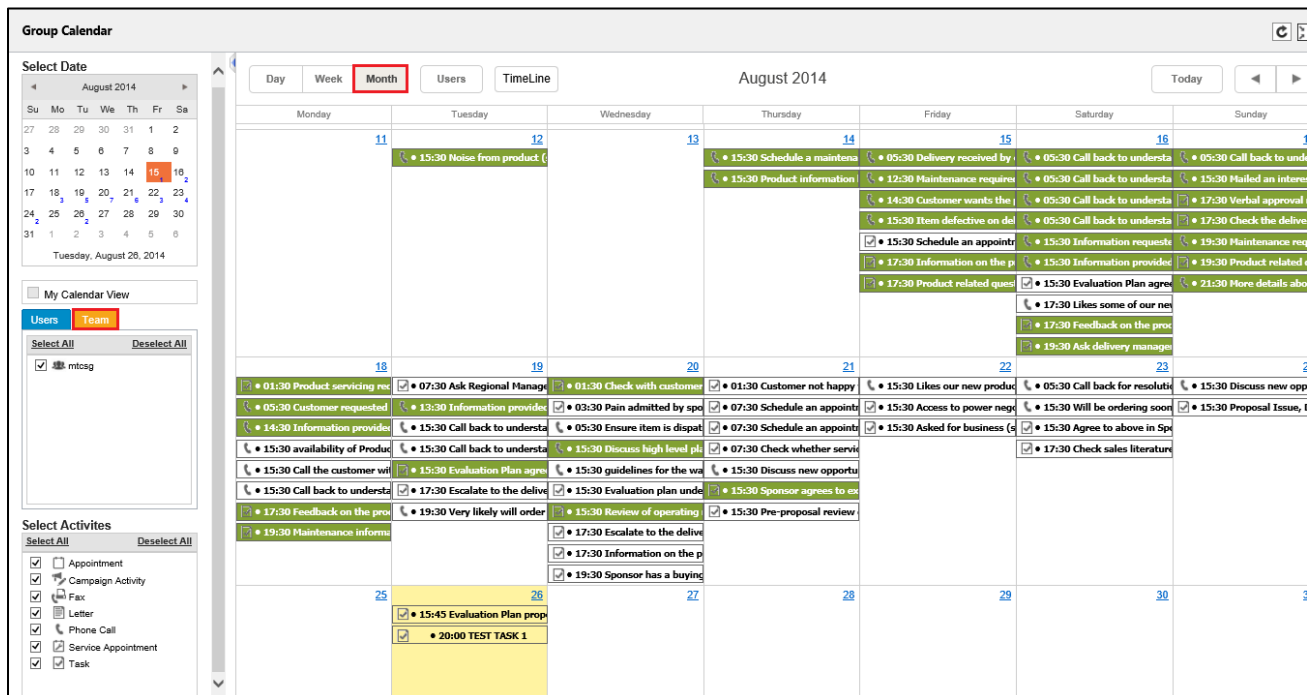


Figure 43: Calendar View - Monthly (Team)

- Monthly details of all Activities are displayed for a Team

Calendar view monthly - Selected Activities (for multiple Users)

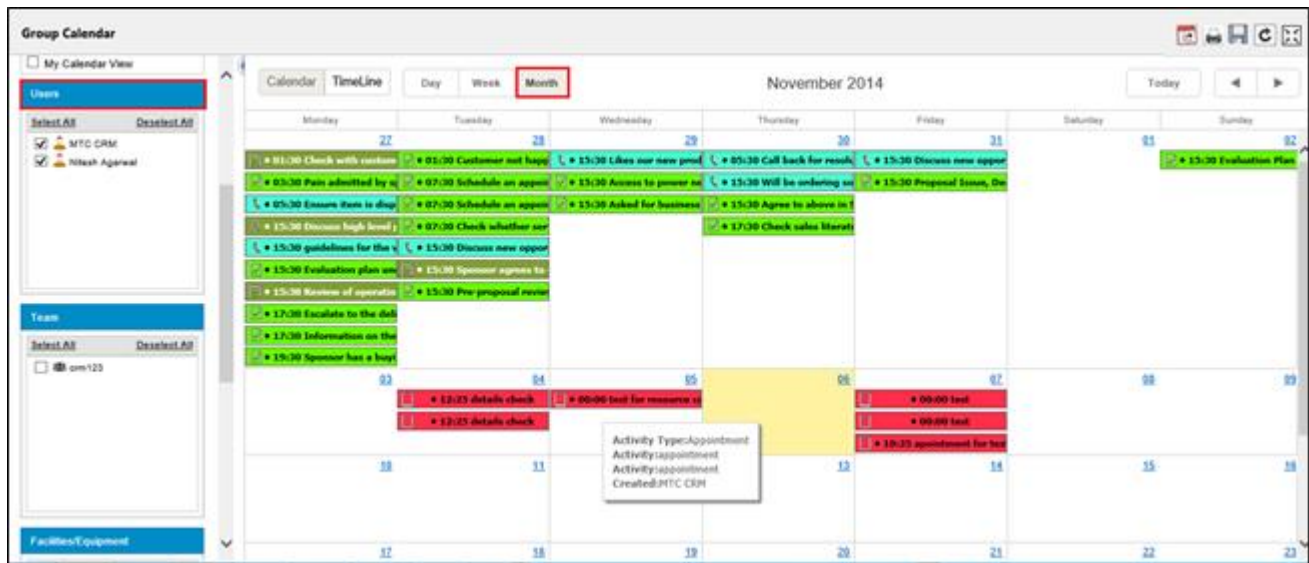


Figure 44: Calendar view monthly - Selected Activities

- All Activities shown in Green color indicates that a particular activity is Closed or Finished.

The Calendar can be viewed as Day, Week, Month, User Wise and Time Line – select the required as shown

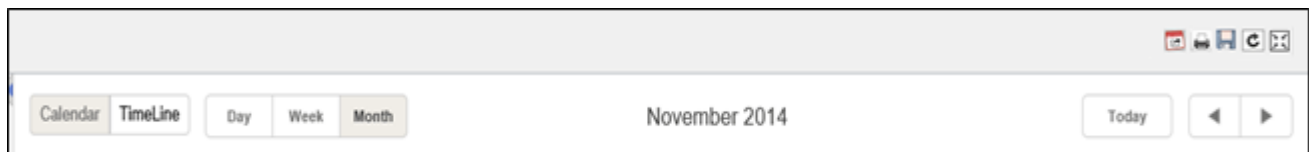


Figure 45: Select Calendar - Day, Week, Month, User Wise or Time Line

Calendar view monthly - Selected Activities (for Team)

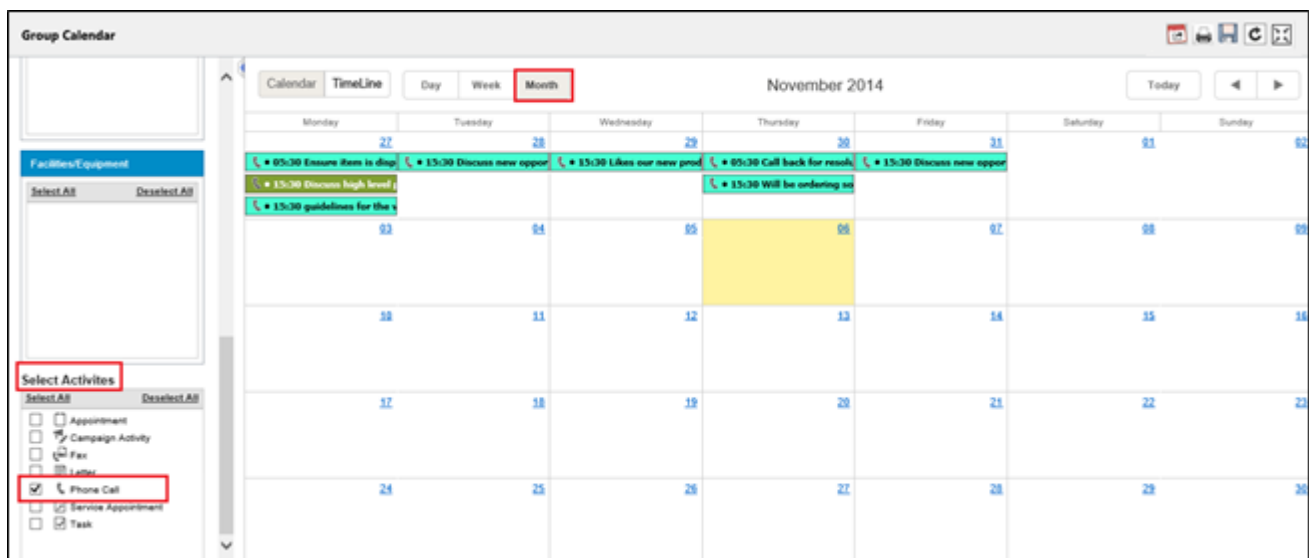


Figure 46: Calendar view monthly - Team Activities

Calendar view - Week Wise (User wise)

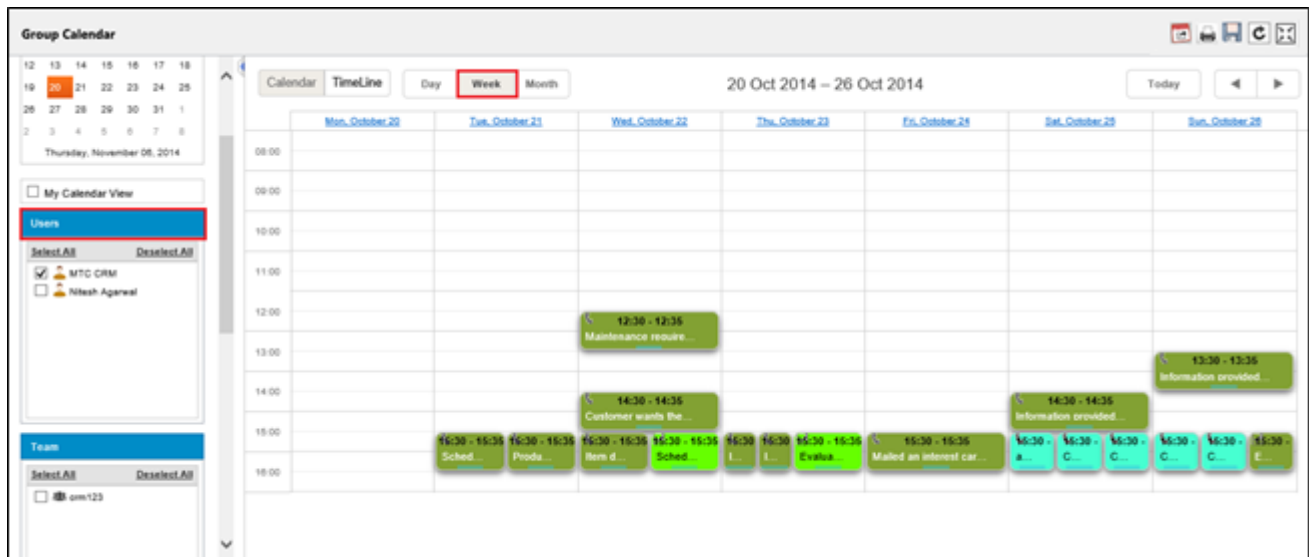


Figure 47: Calendar view - Week Wise

- Here in this Weekly wise calendar, one can view always for the selected week from Monday to Sunday.
- The Top of the screen has the Time Line details for all the activities for the Week, user has the facility to scroll up or down to view the record details.
- User can also select My Calendar view or Single User or Multiple Users along with Single Activity or Multiple Activities to view Weekly calendar
- All Activities shown in Green color indicates that a particular activity is Closed or Finished.

Calendar view - Week Wise (Team wise)

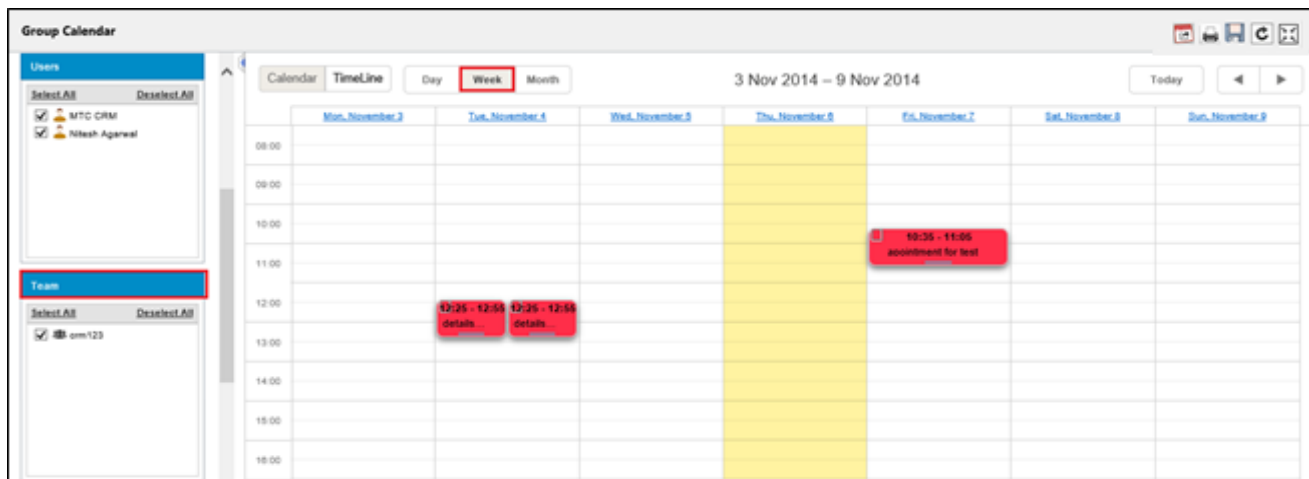


Figure 48: Calendar view - Team Wise

Calendar View - Day wise (User wise)

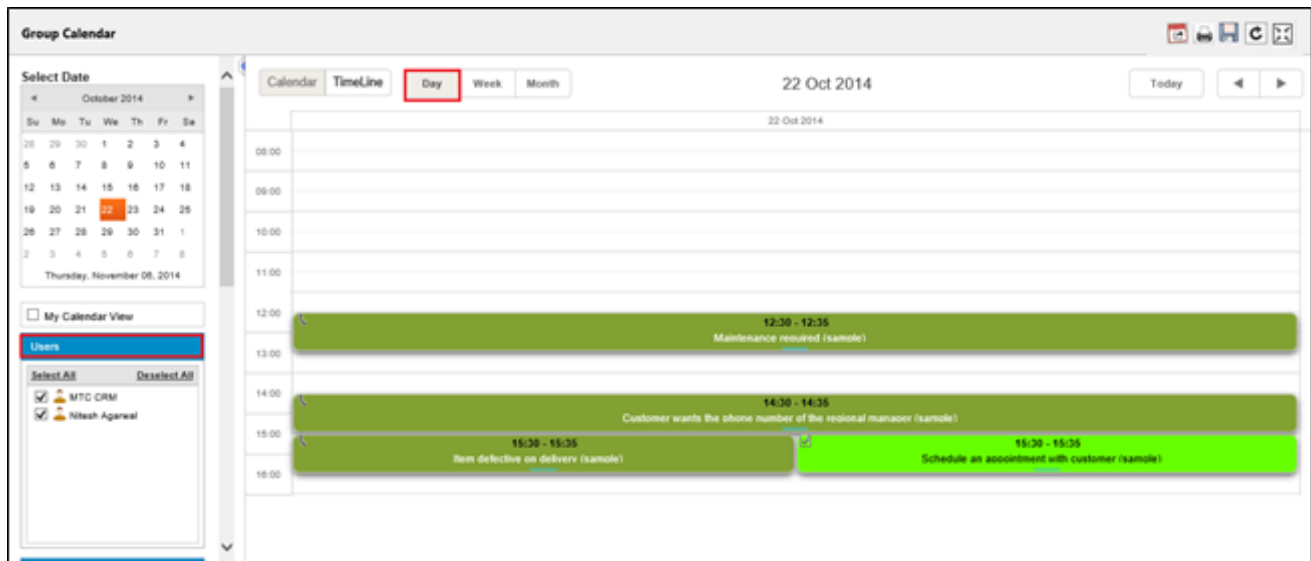


Figure 49: Calendar View - Day wise

- Here in this Day wise calendar, one can view always for the selected day of the month.
- The Top of the screen has the Time Line details for all the activities for the Day, user has the facility to scroll up or down to view the record details.
- User can also select My Calendar view or Single User or Multiple Users along with Single Activity or Multiple Activities to view Weekly calendar
- All Activities shown in Green color indicates that a particular activity is Closed or Finished.

Calendar View - Day wise (Team wise)

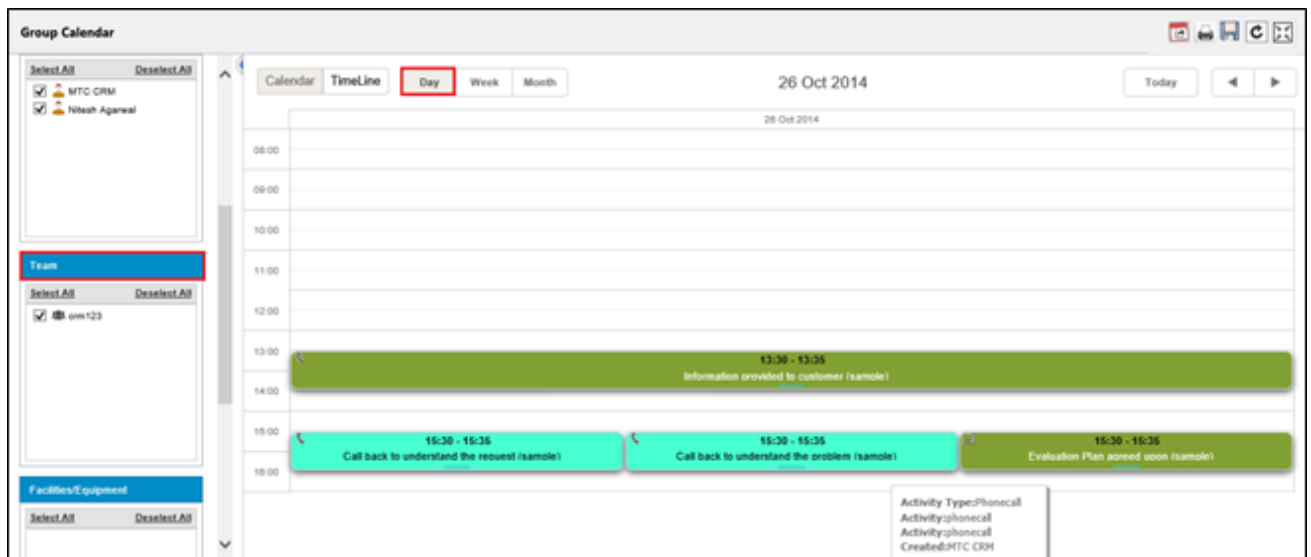


Figure 50: Calendar View - Team

Time Line View – Day Wise - User Wise / Team Wise

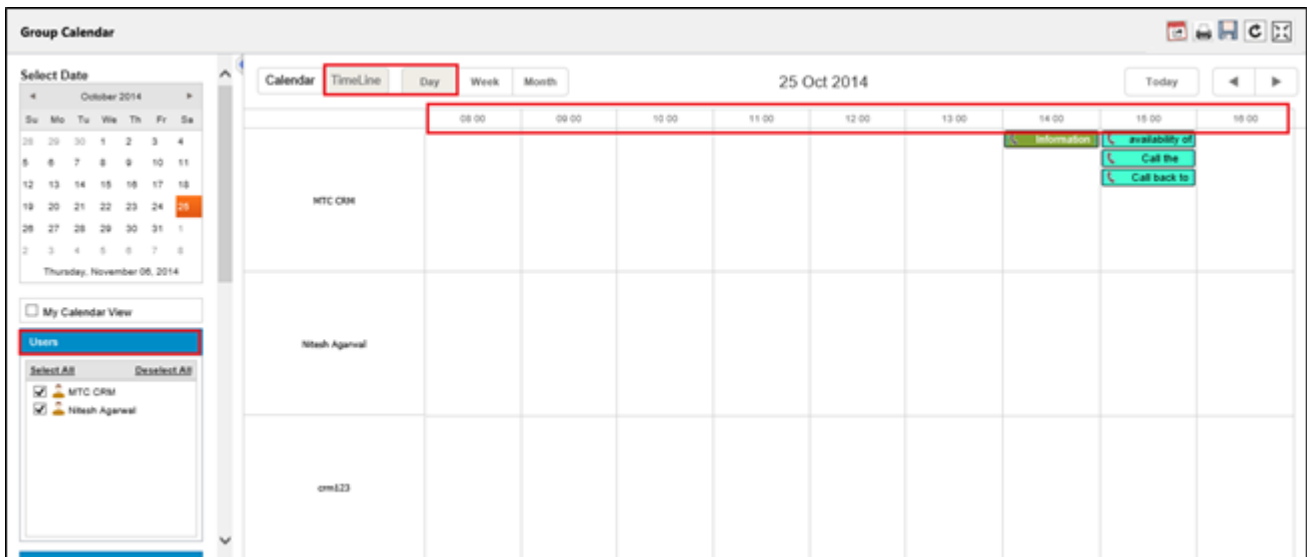


Figure 51: Time Line View Hours wise



Figure 52: Time Line Hours View Enlarged

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

Time Line View – Weekly View – User Wise / Team Wise

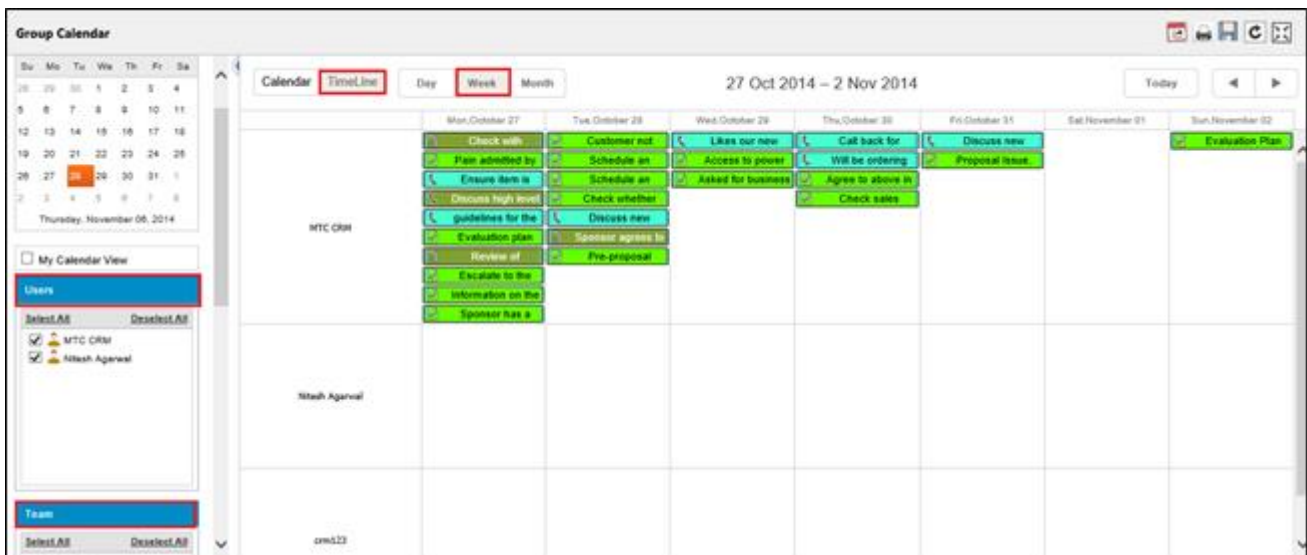


Figure 53: Time Line View – Weekly



Figure 54: Time Line Weekly View Enlarged

- On Selection of the Week, it always displays calendar from Monday to Sunday of the Selected week only
- Weekday along with Month and Date is displayed

Time Line View – Monthly View – User Wise / Team Wise

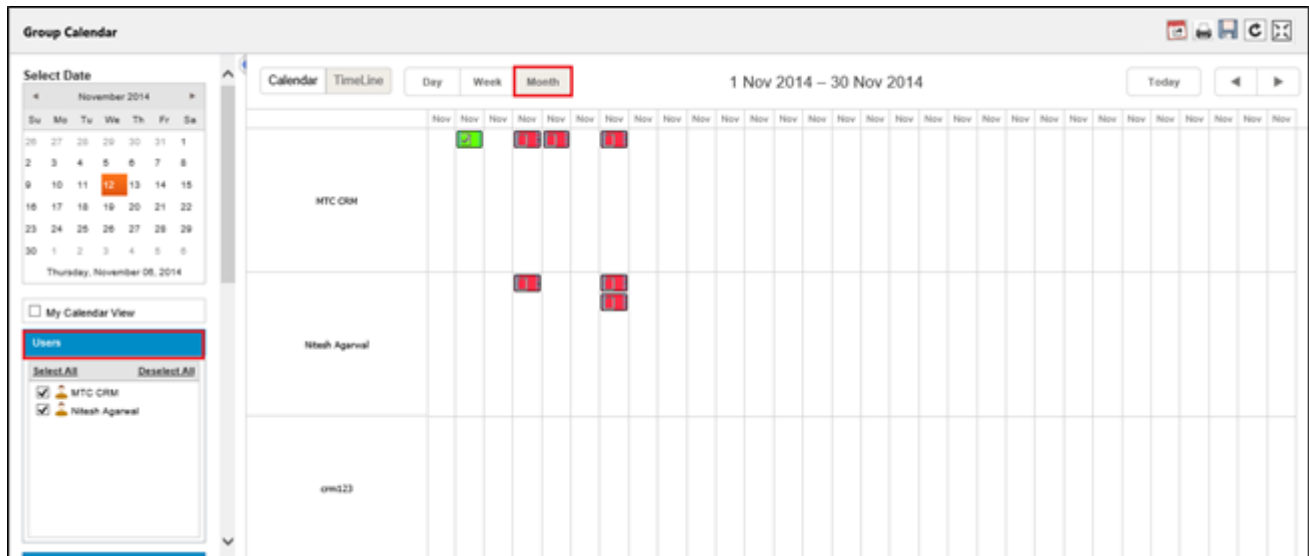



Figure 55: Time Line Monthly view



Figure 56: Time line Monthly view - 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. User has the option to Select all Users or Deselect users or Select only few which are necessary to view
2. User can select either User wise or Team wise or Facilities wise or combination of these
3. User has the option to Select all Activities or Deselect all Activities or Select only few activities which are necessary to view
4. User can also Select My Calendar View to see his personal details of Activities
5. Apart from the regular view of the calendar user can also have Time Line view of calendar
6. User has option to Drag & drop any activity on the Calendar
7. User can Save or Retrieve any calendar of this choice
8. User can opt to view Full Screen mode also by selecting 
9. In all views 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 dragged 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

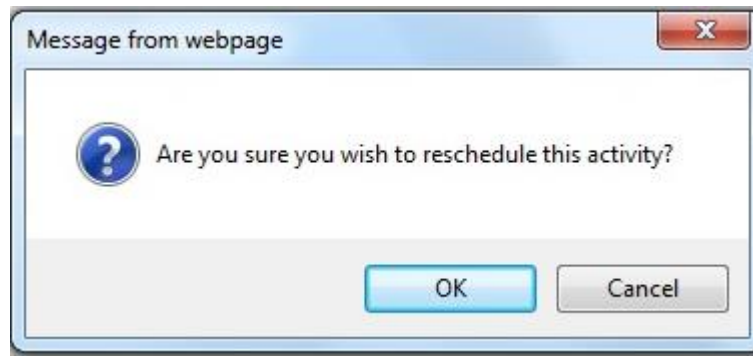


Figure 57: Drag & Drop - Message

Uninstallation Process

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

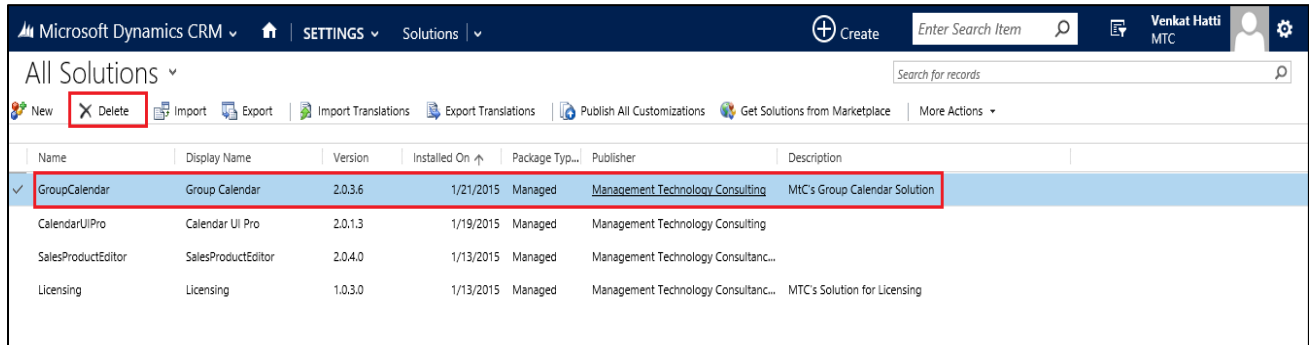


Figure 58 : Deleting Group Calendar Solution

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

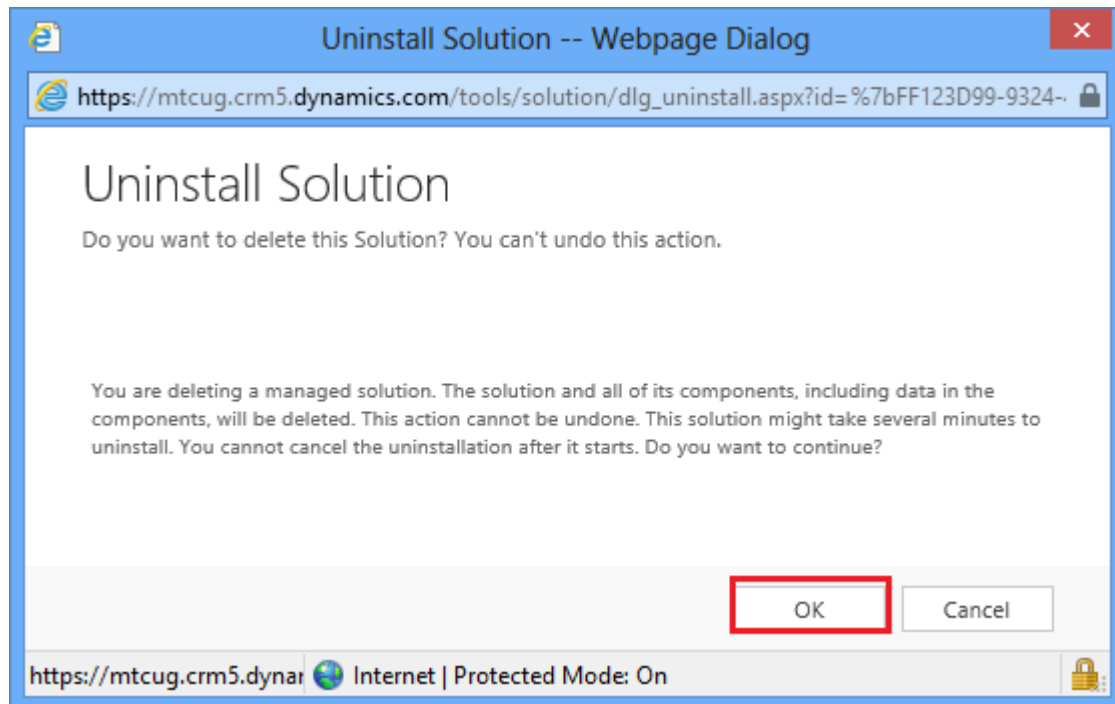


Figure 59: Uninstall Solution

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

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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

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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.

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