MTC Management Technology Consulting LLC

Dynamics 365 / CRM / XRM Platform

My Calendar

User Guide

Microsoft Dynamics CRM

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

My Calendar is an ingenious add-on for Dynamics 365 / CRM that allows users to keep a track of activities they are involved in and discharge their duties in a time bound manner. Users can see the total number of activities assigned on a particular day; check the activity status in a differentiated color coding; view activities in day/week/month wise Calendar and Timeline views; drag and drop activities between across calendar and add new activities on the fly.

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License Key

- To install My 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

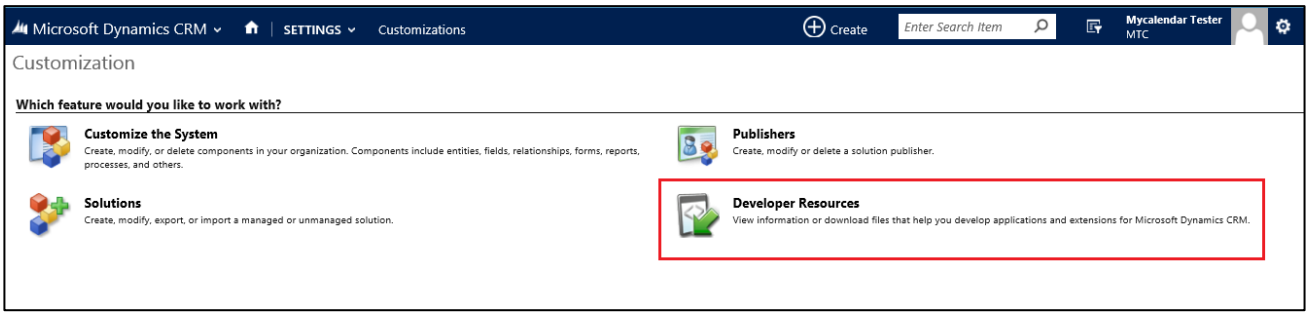

Figure 1: Developer Resources

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

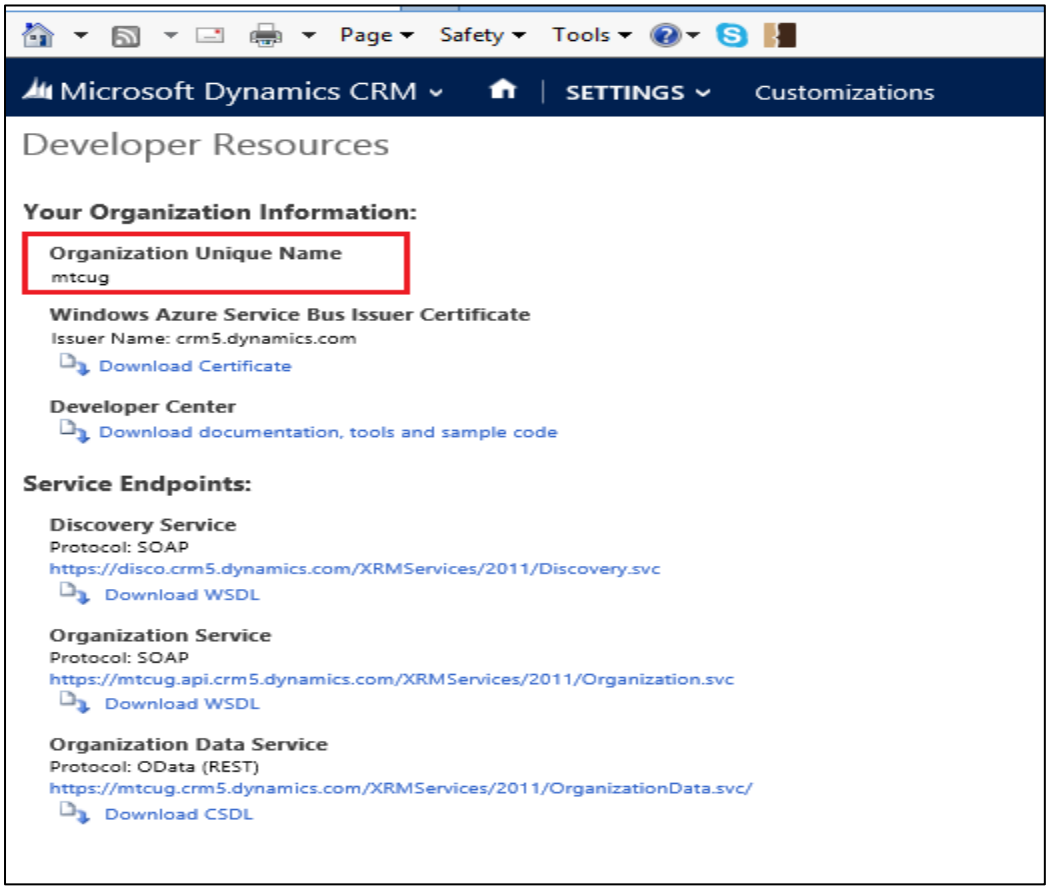

Figure 2 : Organization Unique Name

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

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Installation Process

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

STEP 1:

- Go to http://www.mtccrm.com/My.aspx click on Download to get Solution.
- On Downloading you will get **MyCalendar_2_0_0_1.zip** (ZIP file).
- Extract the files from the downloaded folder. You will get two WINRAR ZIP files

MyCalendar_20152016.042016.3.0_managed.zip

Licensing_20152016.042016.3.0_managed.zip

STEP 2:

- Open your CRM click on **Settings→Solution→Import** it will open import Solution window.

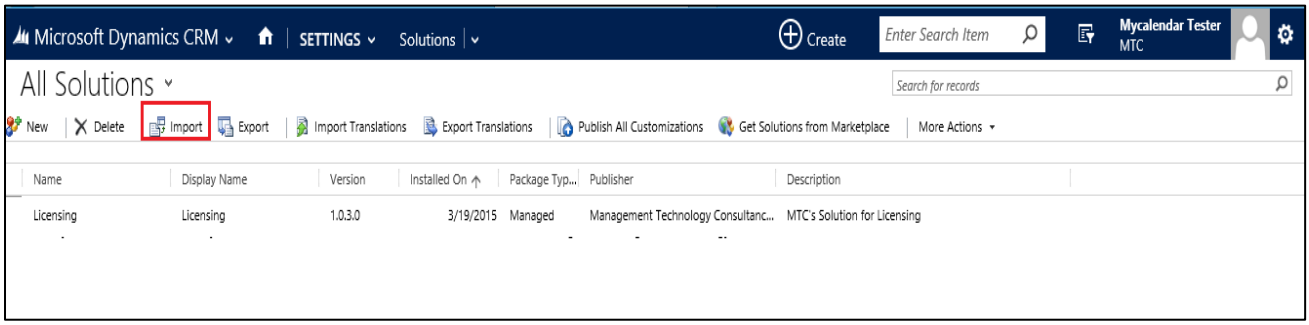

Figure 3: Import Solution

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.
- **Initially Import Licensing solution first and later the My calendar solution**

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Installing Licensing Solution

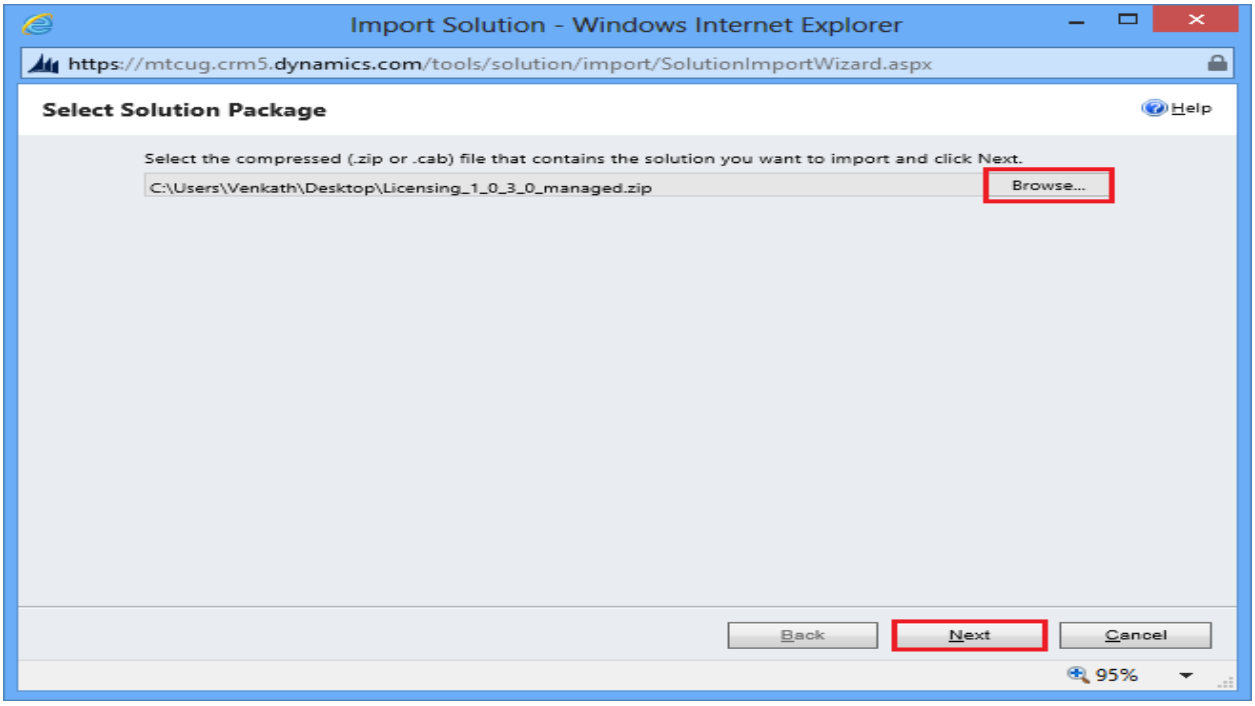

Figure 4 : Select Solution Package

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

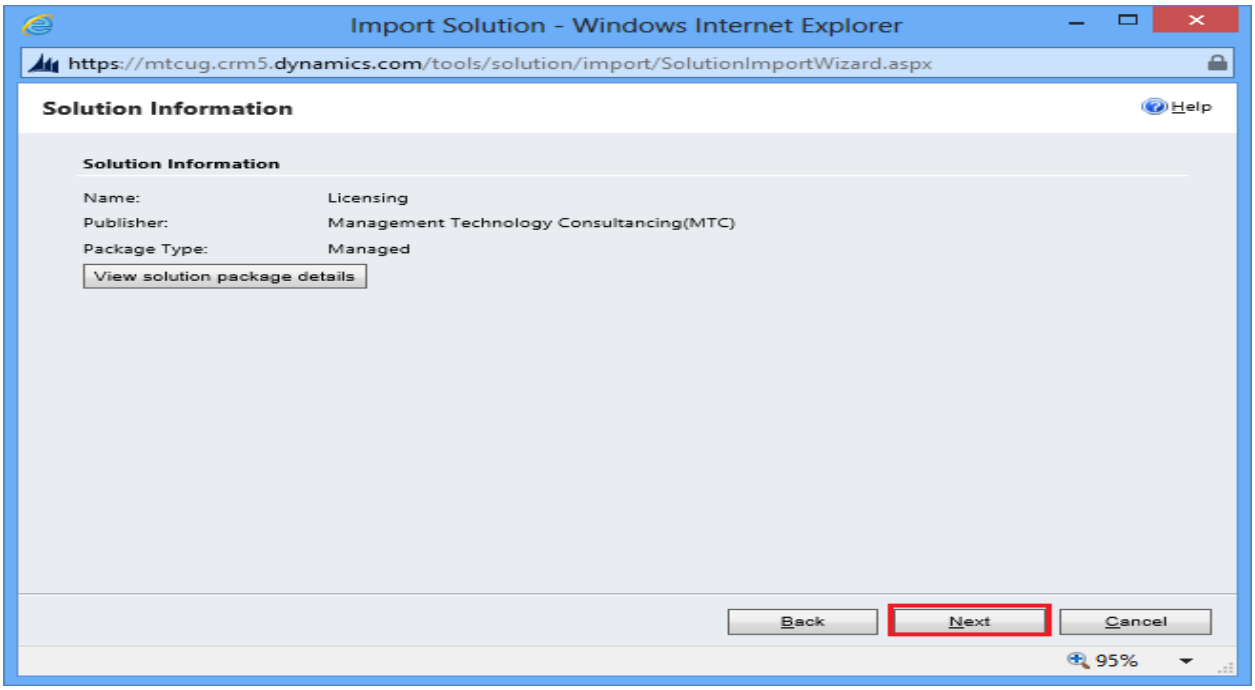

Figure 5: Importing Options window

- Click on Next to proceed

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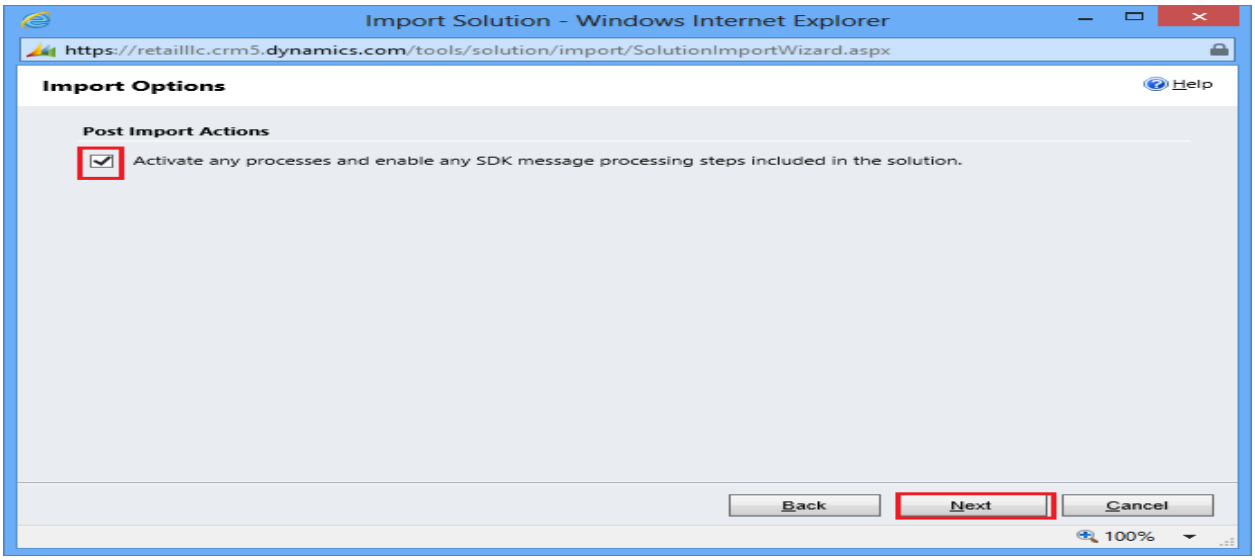

Figure 6: Import Option

- Click on Next to proceed

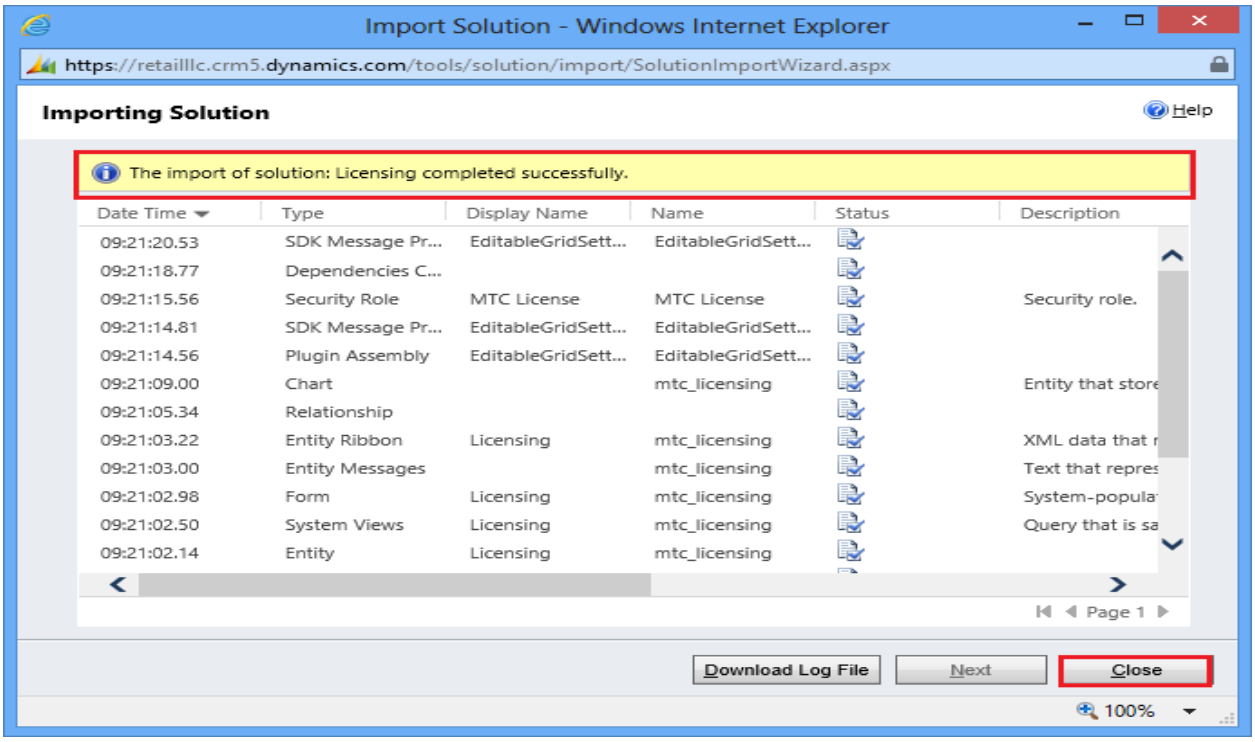

Figure 7: Importing Solution – Licensing

- Click on Close after successful completion message is displayed.

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Installing My Calendar Solution

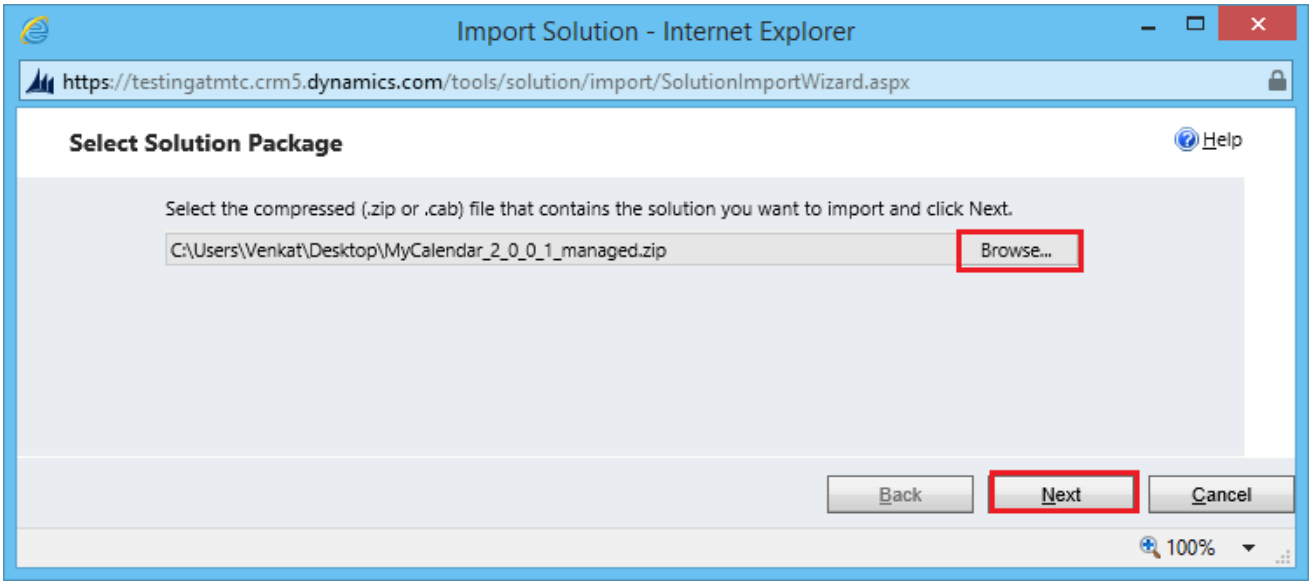

Figure 8: Select Solution Package

- Click Next to continue

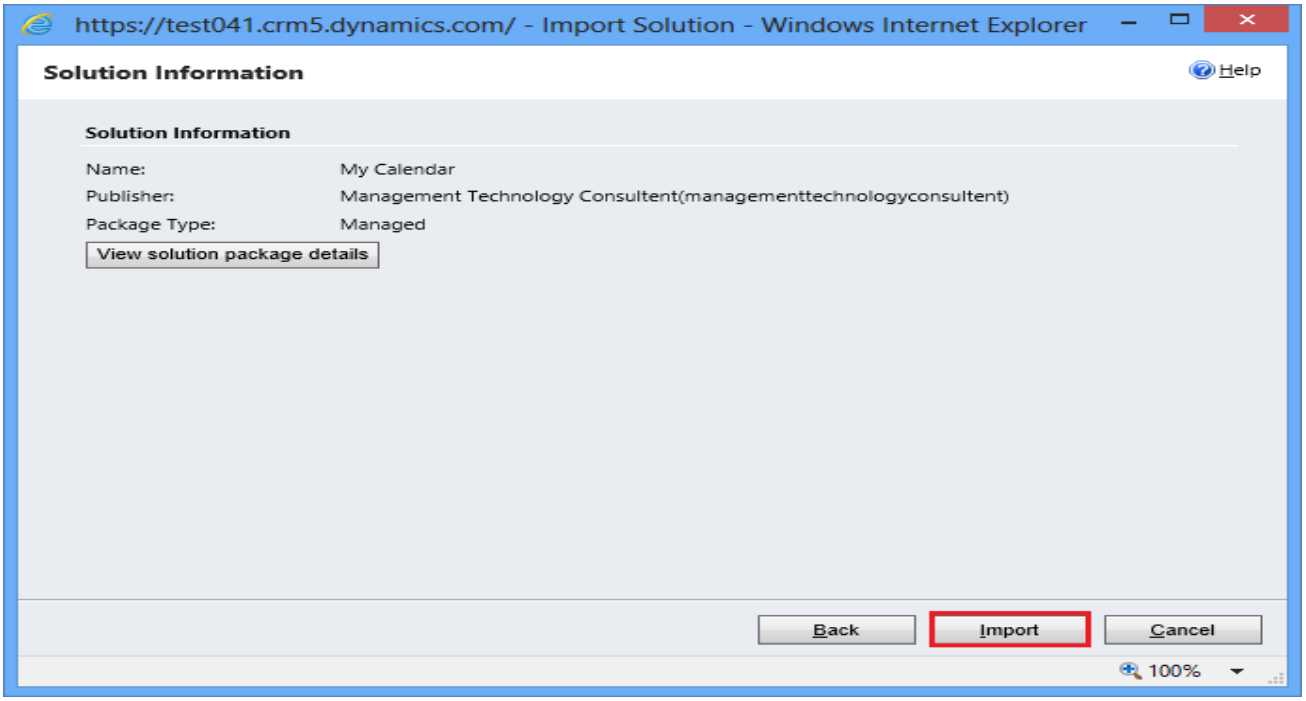

Figure 9: Solution Information

- 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.

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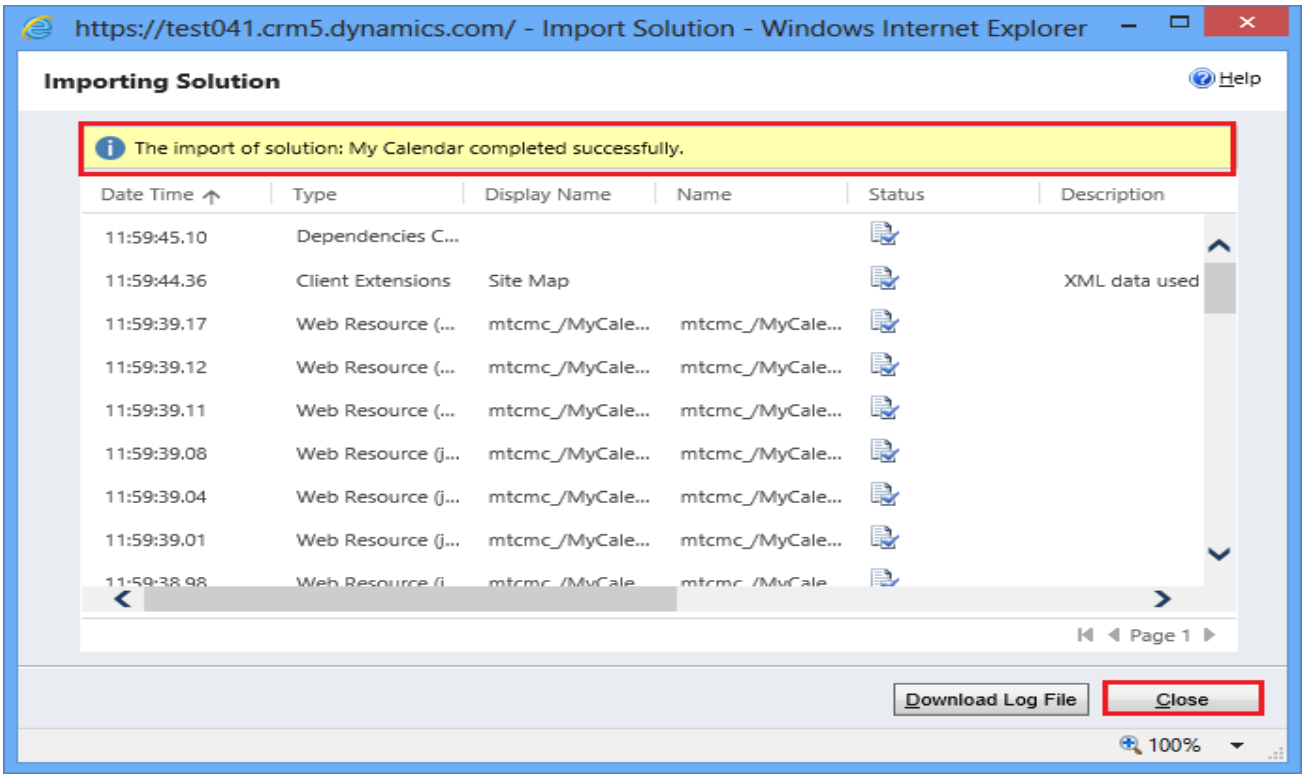

Figure 10: Importing Solution

- Select the product as My **Calendar and double click**

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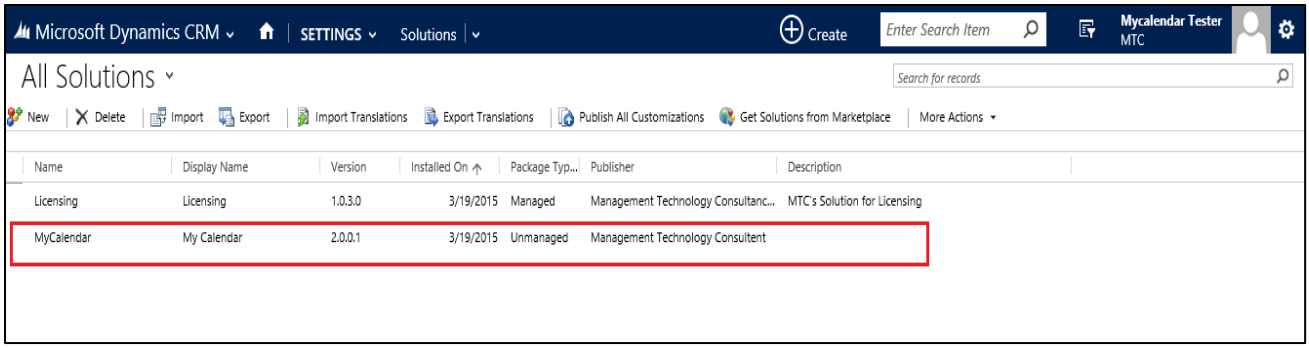
Activating License Key

- **CRM->Settings->Solutions**-> double click on My Calendar Solution



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

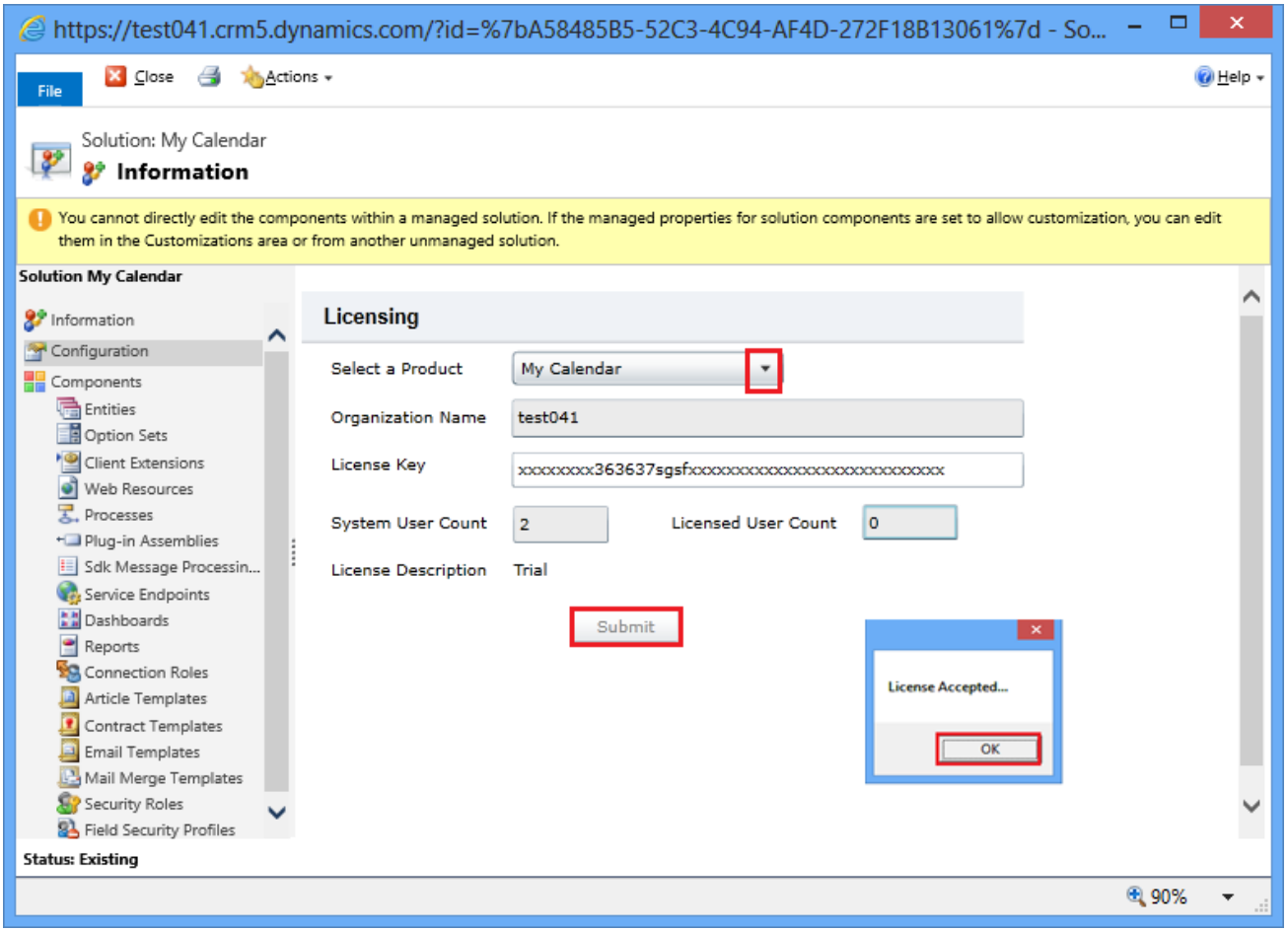


Figure 11: Placing of License Key

- Select Product as My Calendar
- Copy & Paste the License key which you have received from salesteam@mtccrm.com
- Click on Submit

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- A pop up window appears and displays the message as License Accepted. Click on OK.

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.

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My Calendar Functionality

- Only User who logs in to CRM can Use this My Calendar
- Single or multiple user facility are available with Other MTC Calendaring User Interface Products
- Open CRM Go to **Service-> My Calendar**

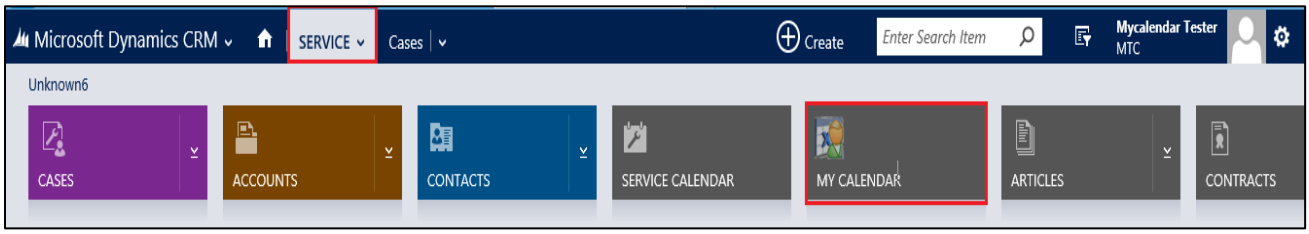

Figure 12: CRM 2013 Ribbon

Select Activities

Select Single or Multiple Activities such as

- Appointment
- Task
- Service Appointment
- Phone Call
- Letter
- Fax
- Campaign Activity
- The working pane has Date Calendar on top, and Activities list at the bottom. (left Side)
- The right side of screen displays the Calendar with activities details
- Only the users who logs in the CRM are listed in this list (Only One User)
- To move the Activity just Drag and Drop it in the required place

To Create a New Activity just Right click on the Calendar Grid on the time or Date that you wish to create a activity

- On selecting Create Activity, activity form is opened. Input the required data and save the form, it in turn reflects in the My Calendar.

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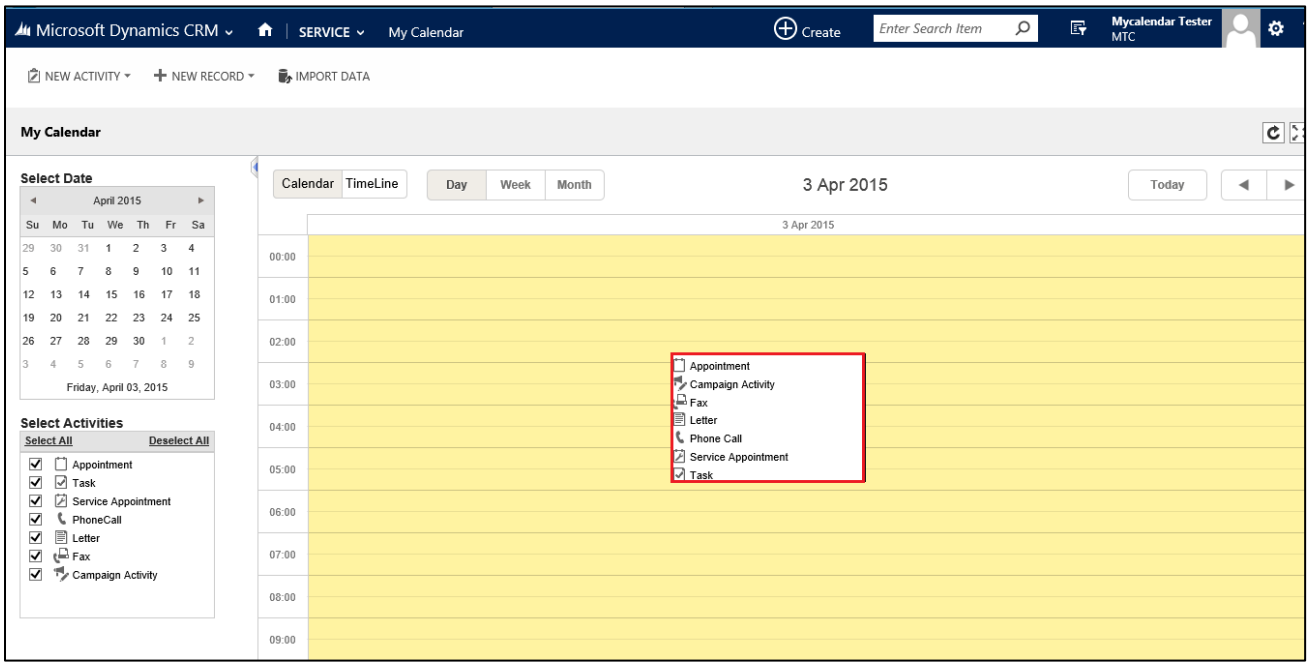

Figure 13: Create Activity

- The drop down list has all the Activities such as Appointment, Task, Service Appointment, Phone Call, Letter, Fax and Campaign Activity as shown.
- To View the calendar to your choice first Select the Calendar date, and selecting the Activities as shown

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

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

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

(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.

To expand the Calendar grid to a full page view. It's a toggle key to et back to original screen.

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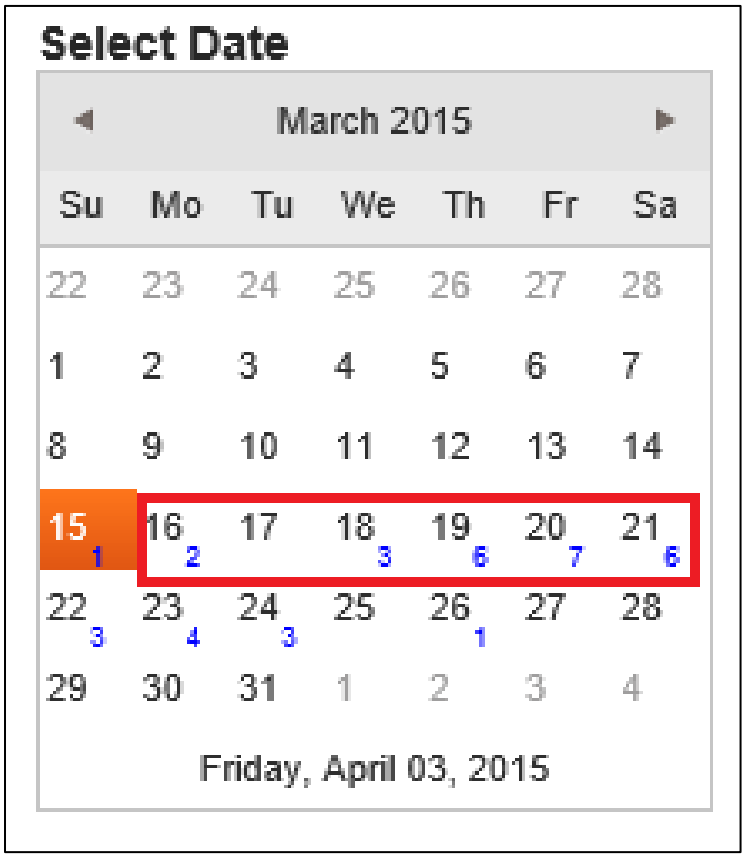
Important to Note

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 various Time Line views of calendar as shown above
3. User has option to Drag & drop any activity on the Calendar
4. User can opt to view Full Screen mode also by selecting or Hide the Left side of the working screen by clicking on toggle.
5. Even in Time Line view user can change the Activity timings by dragging the icon on both the ends.



This Calendar view is being displayed in every format in this My Calendar.

You can notice that from Dates 16 to 21 there are base figures mentioned as 2, 0 , 3, 6, 7, 6, etc. These are nothing but a consolidated figure showing the user that those many active or open activities are on to his credit for that particular day.

For Example on 19 March he has 6 Activities and On 20 March he has 7 activities.

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Drag & Drop Activities

- User can Drag any the activites from one date to another or One time schedule to another.
- Darg and Drop facility is only for the Activities which are Active in status. This means Activities which are in completed stage can not have this faclility.
- 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

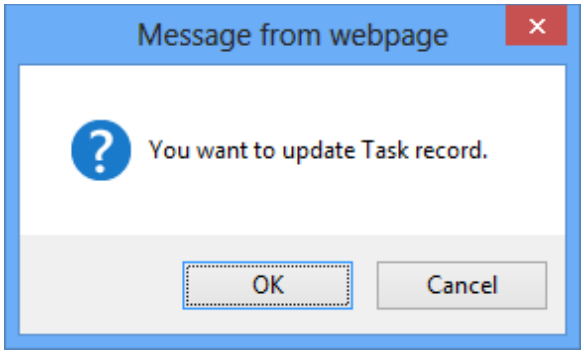
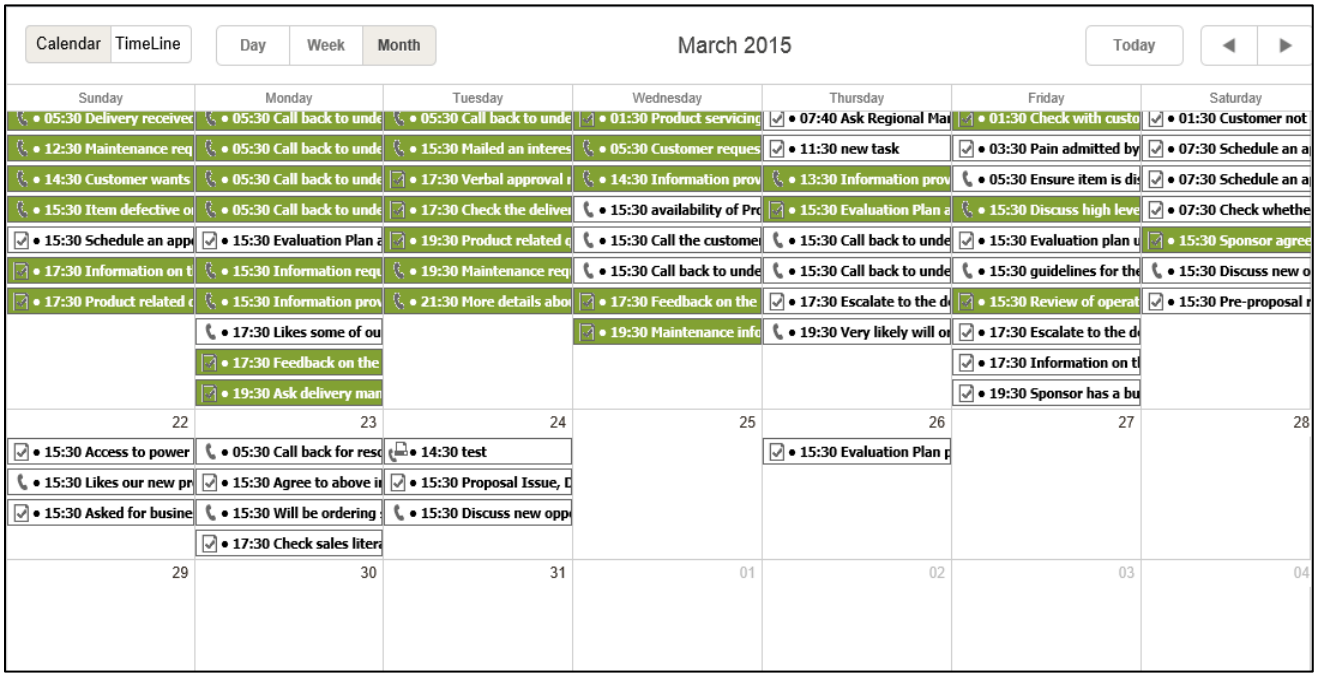


Figure 14: Drag & Drop – Message



- Activities displayed in Color GREEN are an indication that the activity is completed.
- Activities in WHITE color indicates that are still open

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Calendar View for activities assigned for more than one date

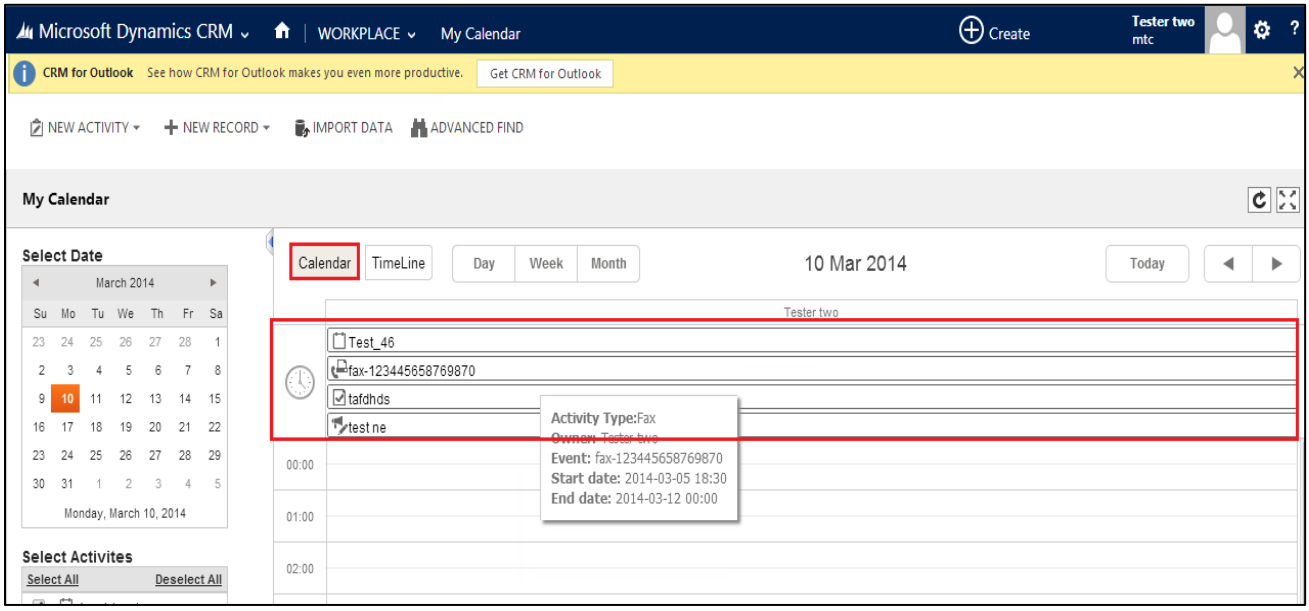

Figure 15: Activities showing for more than One day

- All the Activities which are assigned for more than One day are displayed in the Calendar day view. (For Example Activity Type FAX has been assigned from 5th March 2014 to 12th March 2014 in the above screen shot)Calendar View - Monthly

Calendar view monthly - Selected Activities

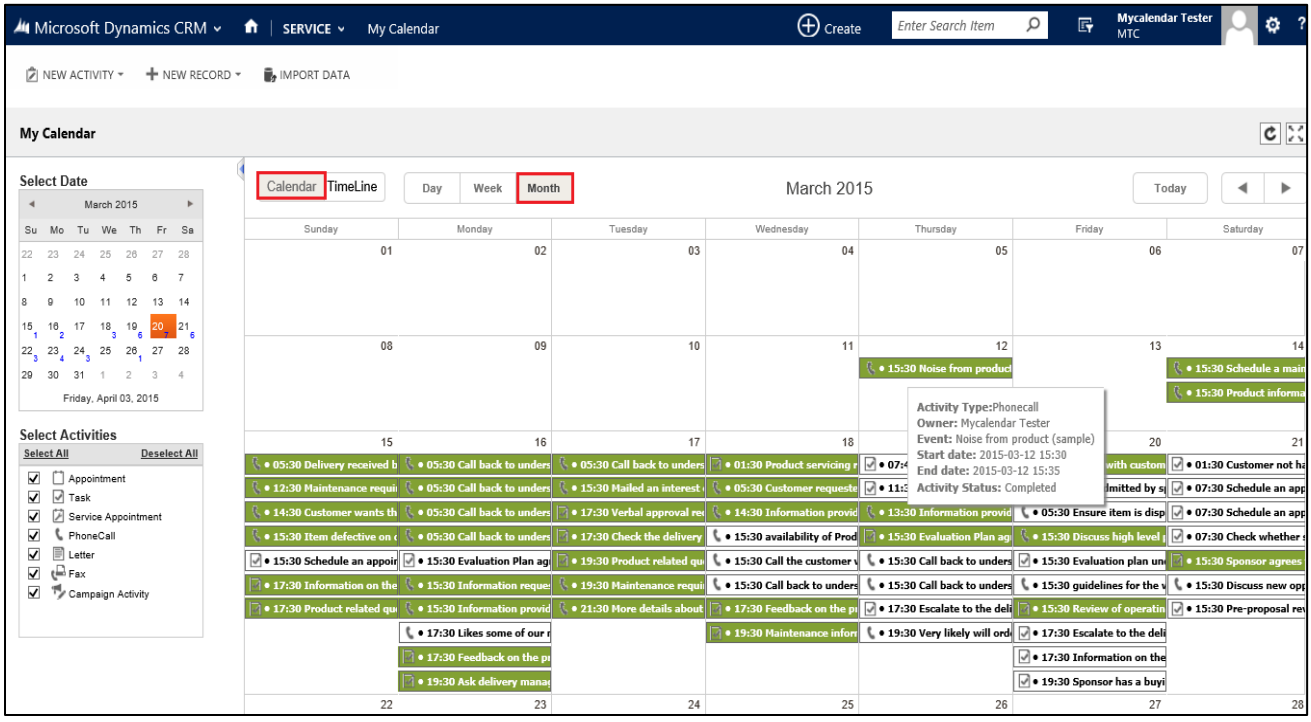

Figure 16: Calendar View - Monthly

- Monthly details of all Activities are displayed for a Single User

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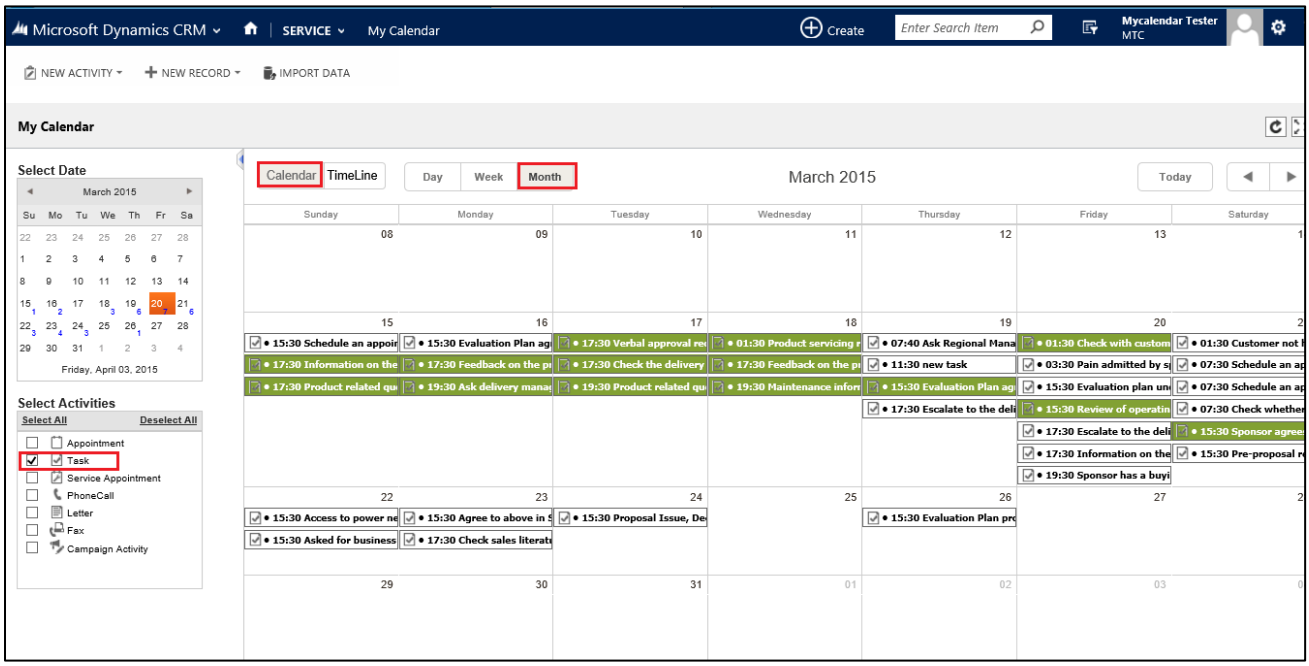

Figure 17: Calendar view monthly - Selected Activities

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

Figure 18: Select Calendar - Day, Week, Month, User Wise or Time Line

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Calendar view - Week Wise

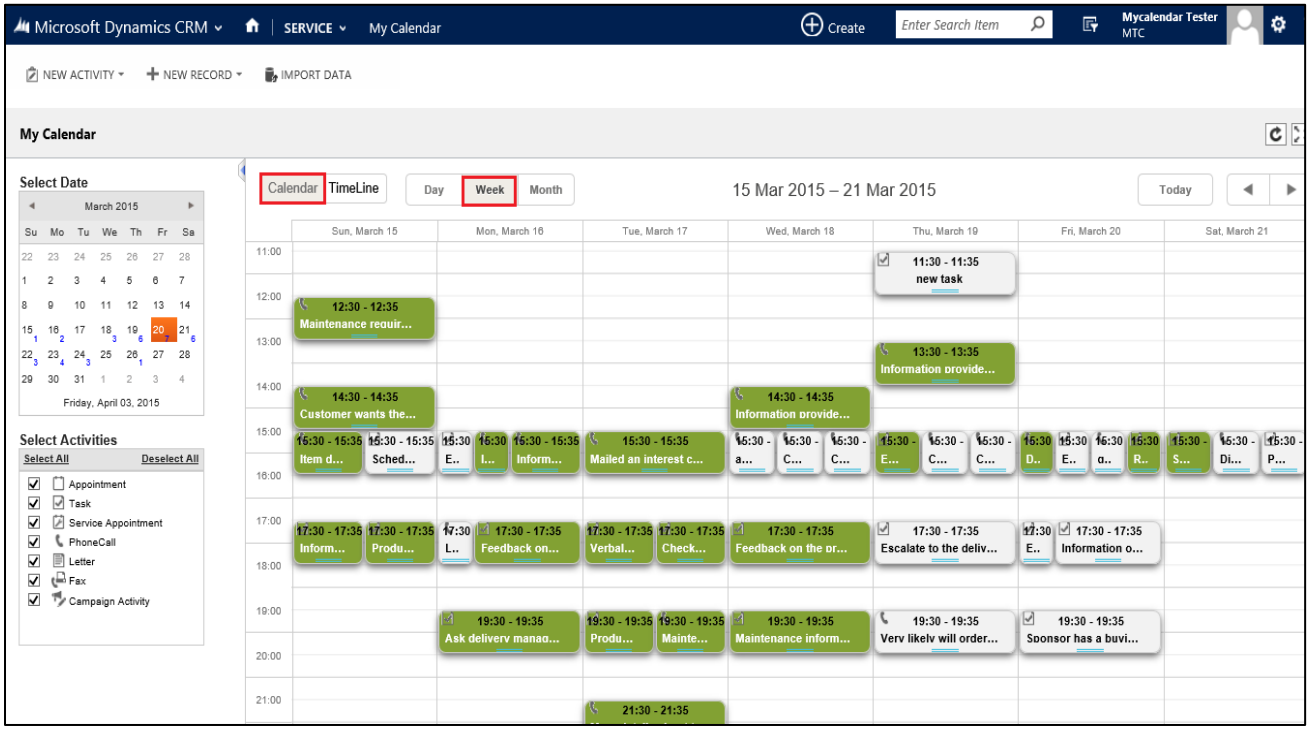

Figure 19: Calendar view - Week Wise

- 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 Task for the Week, user has the facility to scroll up or down to view the record details.
- User can also select Calendar view with Single Activity or Multiple Activities to view Weekly calendar

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Calendar View - Day wise (O Hrs. to 23 Hrs.)

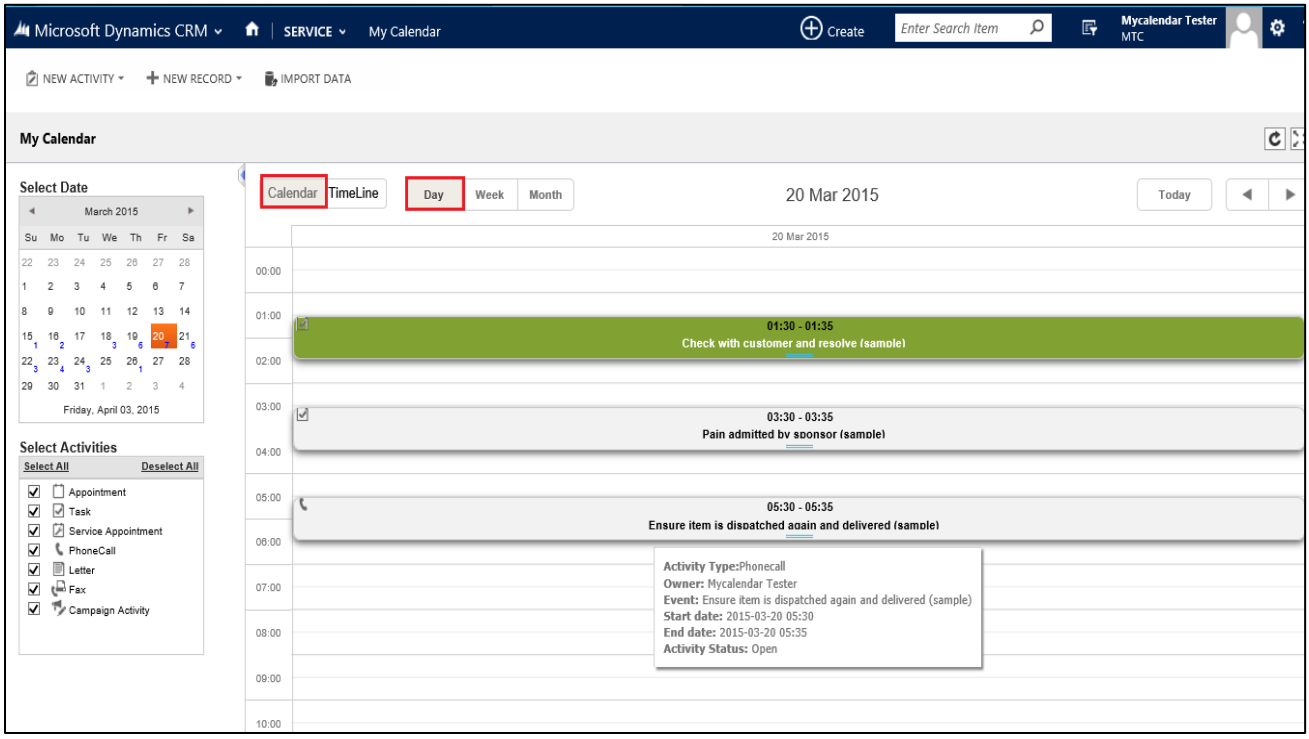

Figure 20: Calendar View - Day wise

- 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 Task for the Day, user has the facility to scroll up or down to view the record details.
- User can also select Calendar view for Single Activity or Multiple Activities to view Weekly calendar

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Time Line View – Day Wise (O Hrs. to 23 Hrs.)

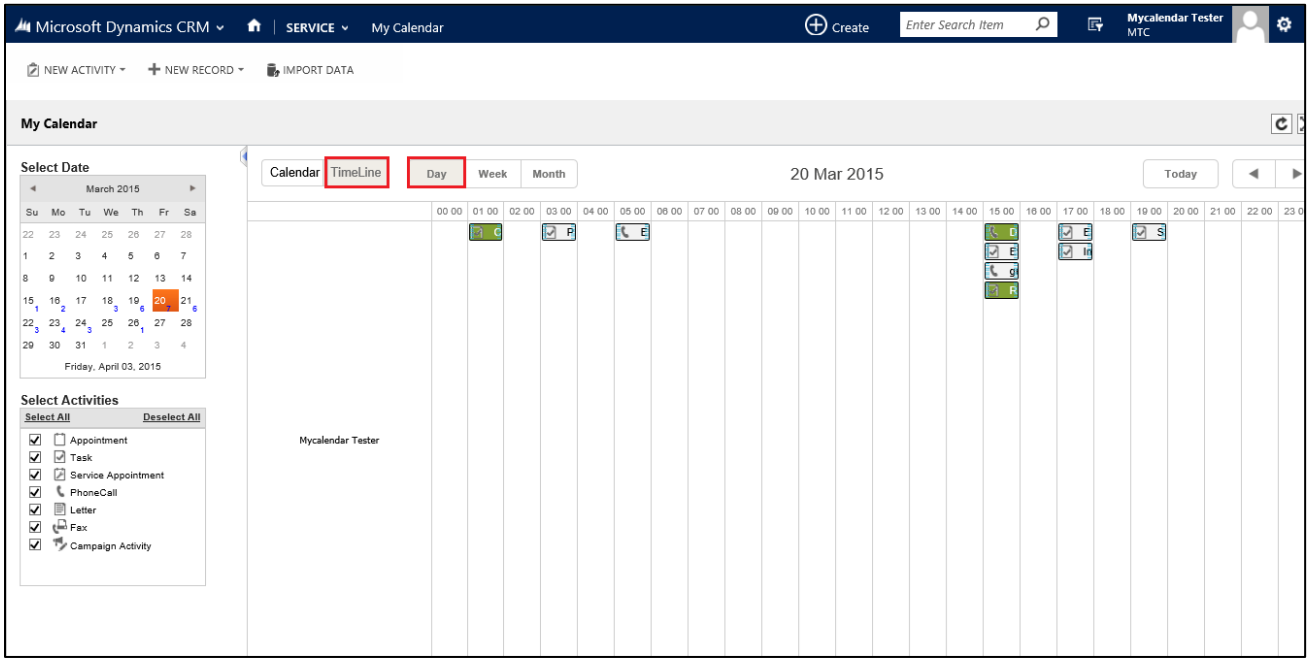
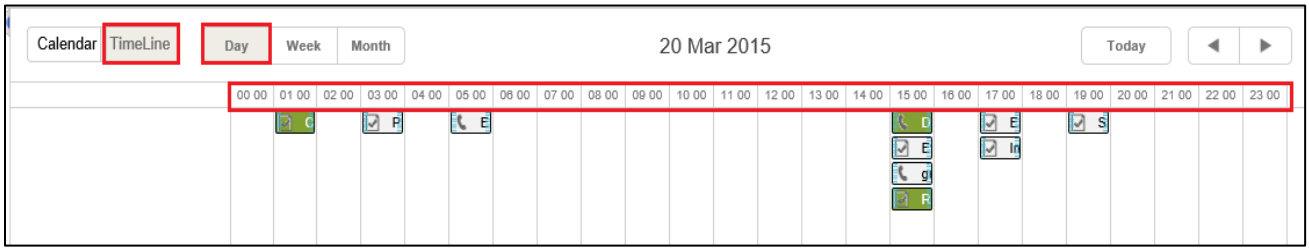


Figure 21: Time Line View Hours wise



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

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Time Line View – Weekly View

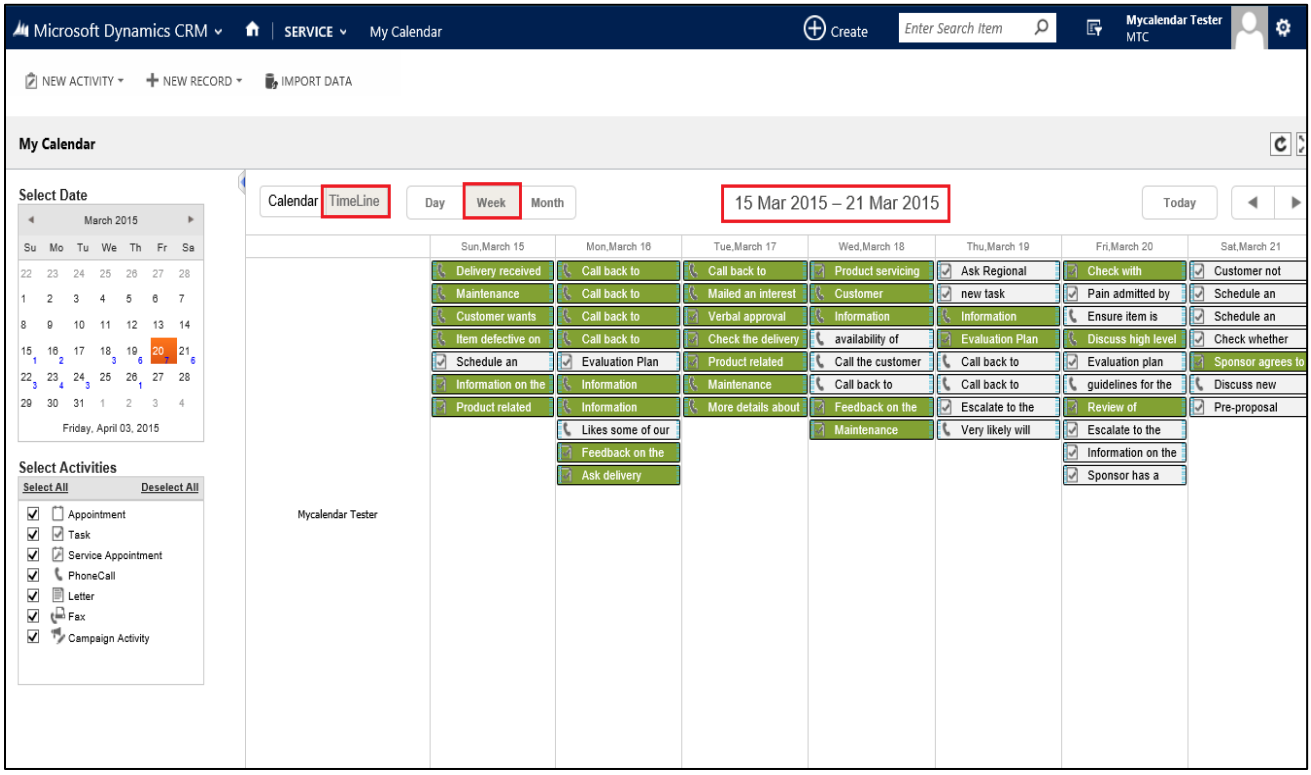
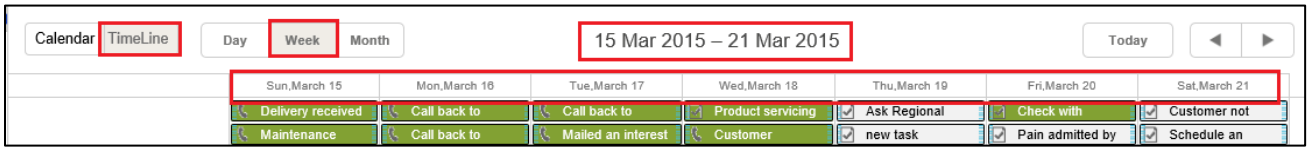


Figure 22: Time Line View – Weekly



- 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

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Time Line View – Monthly View (01 to 31st)

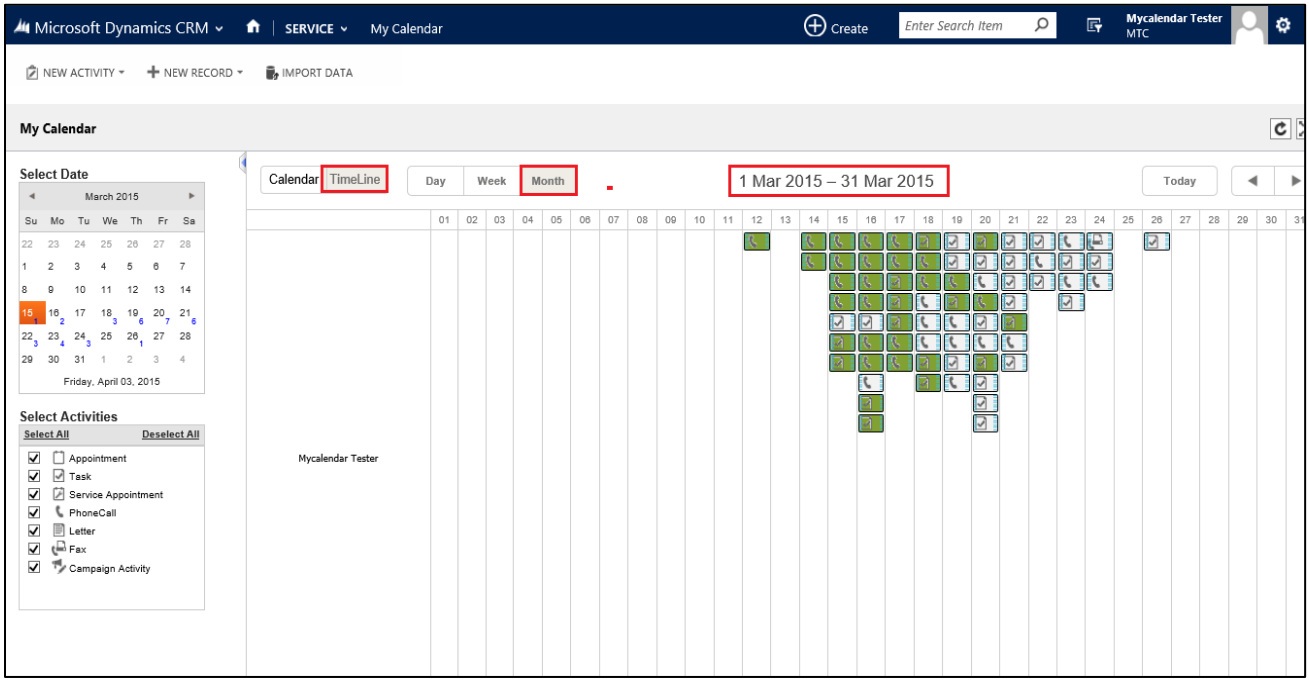

Figure 23: Time Line Monthly - Date wise

- If selected, Month and Time Line option, the Calendar is displayed for the selected month showing all Dates from 1 to 30 or 31st

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Uninstallation Process

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

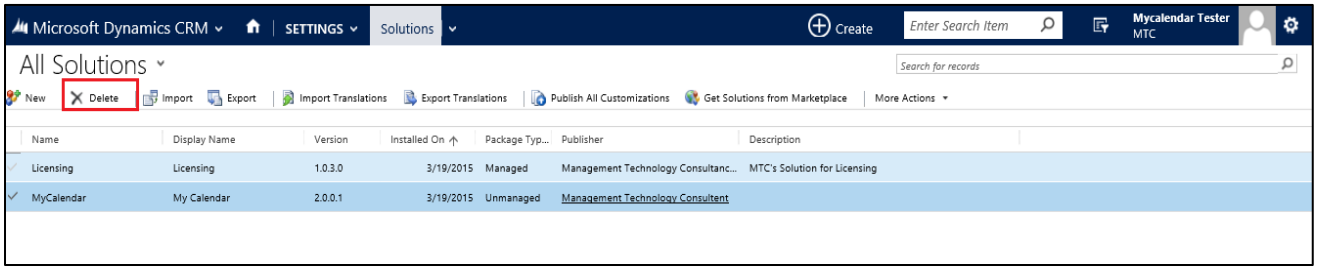

Figure 24 : Deleting My Calendar Solution

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

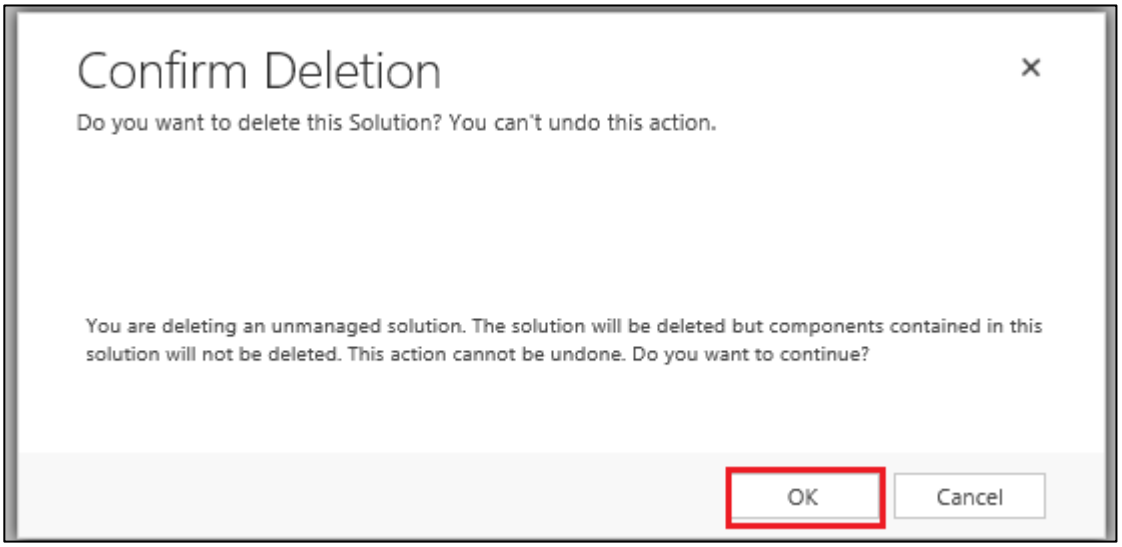

Figure 25 : Uninstall Solution

- Repeat the deletion process with Licensing solution also.

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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

SMB Custom Enterprise
Componentized Solutions on Dynamics xRM

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.

Microsoft Partner

Microsoft Dynamics CRM

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

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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)

Important – Read Carefully. This MTC End-User License Agreement ("**Agreement**") is a legal agreement between you (on the one hand) and Management Technology Consulting, LLC (**MTC**) and its OEM partner(s). ("**OEM**") (On the other hand), for the CRM Managed Solution software product identified within (the "**Product**"), which includes computer software and may include printed materials, and online or electronic documentation. By installing, copying, other otherwise using this Product, you agree to be bound by the terms of this Agreement. If you, the End-User, do not agree to the terms of this Agreement, do not install or use this Product.

This license is not a sale. Title and copyrights to the Product remain with MTC and its OEM partner (s). Unauthorized copying of the data, or failure to comply with the provisions of this License Agreement, will result in automatic termination of this license and will make available to MTC and its OEM partner(s), other legal remedies.

IN THE EVENT OF LICENSE TERMINATION, ALL MATERIALS, DATABASES, AND DOCUMENTATION MUST BE IMMEDIATELY RETURNED TO MANAGEMENT TECHNOLOGY CONSULTING LLC WITH THE ADDRESS LISTED AT THE END OF THIS AGREEMENT.

1. End-User represents and warrants that it is authorized and empowered to enter into this Agreement. Represents and Warrants that it is authorized and empowered to grant the rights hereinafter set forth.
2. Management Technology Consulting, LLC and its OEM partner(s) hereby grants End-User a non-exclusive, non-transferable right to use the Product, subject to the use restrictions and limitations set forth in Section 5 and Section 6 below.
3. MTC shall provide End-User with one (1) machine-readable copy of the Product.
4. End-User acknowledges that the Product is confidential, proprietary material owned and copyrighted by MTC. End-User agrees that MTC and its OEM partner(s) shall retain exclusive ownership of the Product, including all literary property rights, patents, copyrights, trademarks, trade secrets, trade names, or service marks, including goodwill and that MTC may enforce such rights directly against End-User in the event the terms of this agreement are violated.
5. The Product is intended for use solely by End-User for their own internal purposes. The Product may only be used on the CRM Organizational Unit licensed and paid for by End-User to the MTC. End-User agrees not to copy, modify, sub-license, assign, transfer or resell the Product, in whole or in part. End-User agrees not to translate, reverse engineer, decompile, disassemble, or make any attempt to discover the source code of the Product (except and only to the extent applicable law prohibits such restrictions). End-User further agrees not to download/upload the Product, in whole or in part, or to establish a network, place data on the Internet, or offer a service bureau utilizing the Product. End-User agrees to restrict access to the Product to designated employees and to use its best efforts to prevent violation of these restrictions by agents, employees and others, taking such steps and reasonable security precautions as may be necessary. End-User shall permit MTC and/or its representative access to its premises during normal business hours to verify compliance with the provisions of this Agreement.
6. This license authorizes use of the Product on a single CRM Organizational Unit, which shall mean a single Organizational Unit CONFIDENTIALITY NOTICE - The information contained in this document is confidential and proprietary. This document is to be used with the understanding that it will be held in strict confidence and not used for reasons unrelated directly to the specific purpose of this document. No part of the document may be circulated or reproduced for distribution outside the Client organization without prior written permission from Management Technology Consulting LLC.
7. This Agreement shall remain in force as long as the End-User using the Product is paying the applicable MTC Annual Maintenance and Support fee. Failure to pay the periodic maintenance fee shall cause this agreement to expire. MTC or End-User may terminate use of the Product and this Agreement by written notice, at least thirty (30) days prior to the termination. Within thirty (30) days after expiration or notice of termination of the Agreement, End-User shall return to MTC, postage prepaid all copies of the Product. Continued use of the Product or any information contained therein or supplied under this Agreement after termination, or expiration of this Agreement is expressly prohibited.
8. All UPDATES provided by MTC and its affiliates shall be considered part of the Product and subject to the terms and conditions of this Agreement. Additional license terms may accompany UPDATES. By installing, copying, or otherwise using any UPDATE, End-User agrees to be bound by this Agreement and any terms accompanying each such UPDATE. If End-User does not agree to the additional license terms accompanying such UPDATES, do not install, copy, or otherwise use such UPDATES.

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9. End-User agrees that MTC and its affiliates may collect and use technical information End-User provide as a part of support services related to the Product.
10. End-User acknowledges that the Dynamics 365 / CRM Managed Solution "Product" is of U.S. origin and agrees to comply with all applicable international and national laws that apply to the Product, including the U.S. Export Administration Regulations, as well as end-user, end-use and destination restrictions issued by U.S. and other governments.
11. MTC REPRESENTS THAT THE PRODUCT DOES NOT VIOLATE OR INFRINGE ANY PATENT, TRADEMARK, TRADE SECRET, COPYRIGHT, OR SIMILAR RIGHT. IN THE EVENT THE PRODUCT IS HELD TO INFRINGE THE RIGHTS OF ANY THIRD PARTY, MTC SHALL HAVE THE OPTION EITHER TO PROCURE THE RIGHT FOR THE END-USER TO CONTINUE USING THE PRODUCT OR AT NODUS'S EXPENSE, TO REPLACE OR MODIFY THE PRODUCT SO THAT IT BECOMES NON-INFRINGING. MTC AND ITS OEM PARTNER(S) MAKE NO OTHER WARRANTY, EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE ACCURACY OF THE PRODUCT, THE MERCHANTABILITY AND FITNESS OF THE PRODUCT FOR A PARTICULAR PURPOSE. FURTHER, MTC DOES NOT WARRANT THE COMPATIBILITY OF THE PRODUCT WITH END-USER'S COMPUTER HARDWARE AND/OR SOFTWARE SYSTEM.
12. End-User's sole and exclusive remedy for any damage or loss in any way connected with the Product furnished herein, whether by breach of warranty, negligence, or any breach of any other duty, shall be, at MTC's' option, replacement of the Product or return or credit of an appropriate portion of any payment made by End-User with respect to such Product. Under no circumstances shall MTC or its OEM Partner(s) be liable to End-User or any other person for any indirect, special or consequential damages of any kind, including, without limitation, damages for loss of goodwill, work stoppage, computer failure or malfunction or any and all other commercial damages or losses. Additionally, MTC assumes no liability for damages caused by incorrect parts usage and has no responsibility to verify that the parts are correct for a customer's vehicle in accordance with the manufacturers' specifications.
13. MTC may cancel this license at any time if End-User fails to comply with the terms and conditions of this Agreement; and MTC may obtain injunctive relief and may enforce any other rights and remedies to which it may be entitled in order to protect and preserve its proprietary rights.
14. This Agreement is the complete and exclusive statement of the understanding between the parties, with respect to the subject matter, superseding all prior agreements, representations, statements and proposals, oral or written.
15. No term or provision hereof shall be deemed waived and no breach excused, unless such waiver or consent shall be in writing and signed by the party claimed to have waived or consented. Any consent by any party to, or waiver of, a breach by the other, whether express or implied, shall not constitute consent to, waiver of, or excuse for any other different or subsequent breach.

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A. Limitation of Liability

IN NO EVENT WILL MTC OR ITS OEM PARTNER(S) BE LIABLE FOR ANY DAMAGES, INCLUDING LOSS OF DATA, LOST PROFITS, COST OF COVER, OR OTHER SPECIAL, INCIDENTAL, CONSEQUENTIAL, OR INDIRECT DAMAGES ARISING FROM THE USE OF THE PROGRAM OR ACCOMPANYING DOCUMENTATION, HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY. THIS LIMITATION WILL APPLY EVEN IF MTC HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGE. YOU ACKNOWLEDGE THAT THE LICENSE FEE REFLECTS THIS ALLOCATION OF RISK.

B. General

The laws of the State of California shall govern this Agreement. This Agreement is the entire agreement between MTC and End-User concerning the Product and supersedes any other communications or advertising with respect to the program and accompanying documentation. If any provision of the Agreement is held invalid, the remainder of the Agreement shall continue in full force and effect. If you have any questions, please contact in writing: Management Technology Consulting LLC, 7738 Sky hill Drive, Los Angeles, CA 90068, and Tel: (323) 851-5008.

C. Warranty Disclaimer

Management Technology Consulting LLC, Inc. disclaims any warranty regarding the product or and content or examples contained in this documentation and the Managed Solution code, including the warranties of merchantability and fitness for a particular purpose.

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D. Limitation of Liability

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E. Annual Maintenance and Support

Software products offered by Management Technology Consulting LLC, (MTC) include 1 year of Annual Maintenance and support. Annual maintenance includes your right to the latest versions and any updates to this product at no charge during the 1st year of ownership. Future years of Annual Maintenance must be purchased at a fee equal to 25% of the original purchase price of the product. MTC will notify owners of record by email of the Annual Maintenance renewal time and facilitate collection of fees and simultaneously assure the latest versions and updates are in use.

F. Customer Care details

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

Availability and hours of operation: Monday to Friday

USA PST 323-851-5008 - 8:00 AM to 6:00 PM

India IST 323-863-0077 - 8:30 PM to 8:30 AM in PST

USA Headquarters:

Management Technologies Consulting, LLC

7738 Sky hill Drive, Los Angeles, CA 90068

Request and receive support online at 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.

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