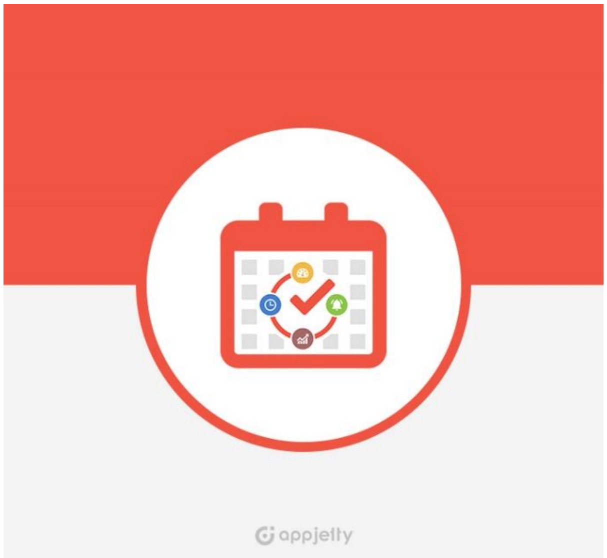
USER MANUAL



Calendar 365

Version: 5.3

Compatibility:

Microsoft Dynamics 365 (Online and On-premise)

Browser Compatibility:

Edge (v12) and above
Firefox (v29) and above
Chrome (v33) and above
Safari (v7.1) and above
Opera (v20) and above

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Introduction

Calendar 365 from AppJetty is a calendar solution for Dynamics CRM. This solution by AppJetty helps you to manage your activities. It also lets you create and manage your own desired activities through Custom Activities.

With this plugin Admin User can manage the activities and the tasks in two different calendars namely **Resource Calendars** for the users and the **Customer calendar** for the customers (clients).

Apart from managing activities, you can view holidays of the country specified by the admin. Later, if the activity related actions are performed, you can Complete or Cancel the activities.

Benefits of Calendar 365

- User can manage multiple CRM activities like Tasks, Fax, Phone Calls, Emails, Letters Appointments, Service Activity, Recurring Appointments, Campaign Activity, Resource Booking and Custom Activity.
- There are two different calendar views: 'Resource Calendar' for Users/Teams, Facilities/Equipment resource and 'Customer Calendar' for the Accounts/Contacts resource.
- **Create & Manage**
  - User can create, edit, and delete activities in both calendar views.
  - User can manage attachments for Emails, Appointments, and Custom Activities.
  - User can set the Overwrite color of the activity based on Status and Priority.
  - User can see the Overdue Activities which are not completed/cancelled yet.
- Multi-Language Support.
- **Saved & Shared Calendar**
  - User can save the calendar with the selected options, calendar view etc. and set the default calendar by clicking on 'Default' icon.
  - Enable the Shared Calendar option to share a calendar with other users.
- **Reminder**
  - User can receive reminder and email notification for the activities.
  - User can also share activities via email.
- **View**
  - User can see activities in different views like Top down view, Gantt view, Timeline view, Agenda view along with its details from the tooltip & configured detail attributes.
  - User can also view the calendar in Day, Day Span, Week and Month views.
  - User can view the activities as per their preferred status like Open, Scheduled, Canceled, Completed.
  - User can enable/disable Holidays and weekends from the Calendar.
- **Activity Actions**
  - User can 'Complete' or 'Cancel' the activities as per requirement.
  - User can convert activities to 'Opportunity' and 'Case'.
  - User can convert email activities to lead directly from the calendar.

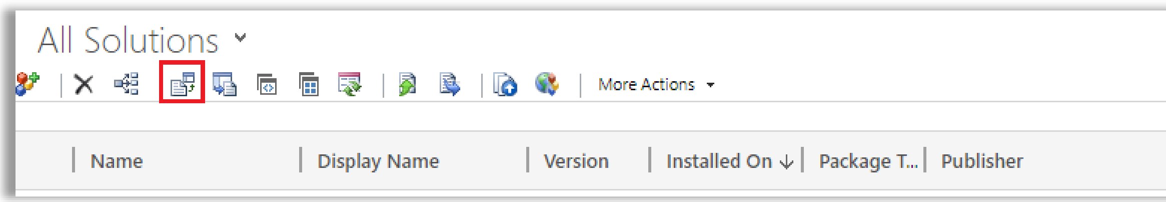
Pre-requisites

- Following steps must be followed before starting the Plugin installation:
- First, you should be logged into Dynamics CRM Online.

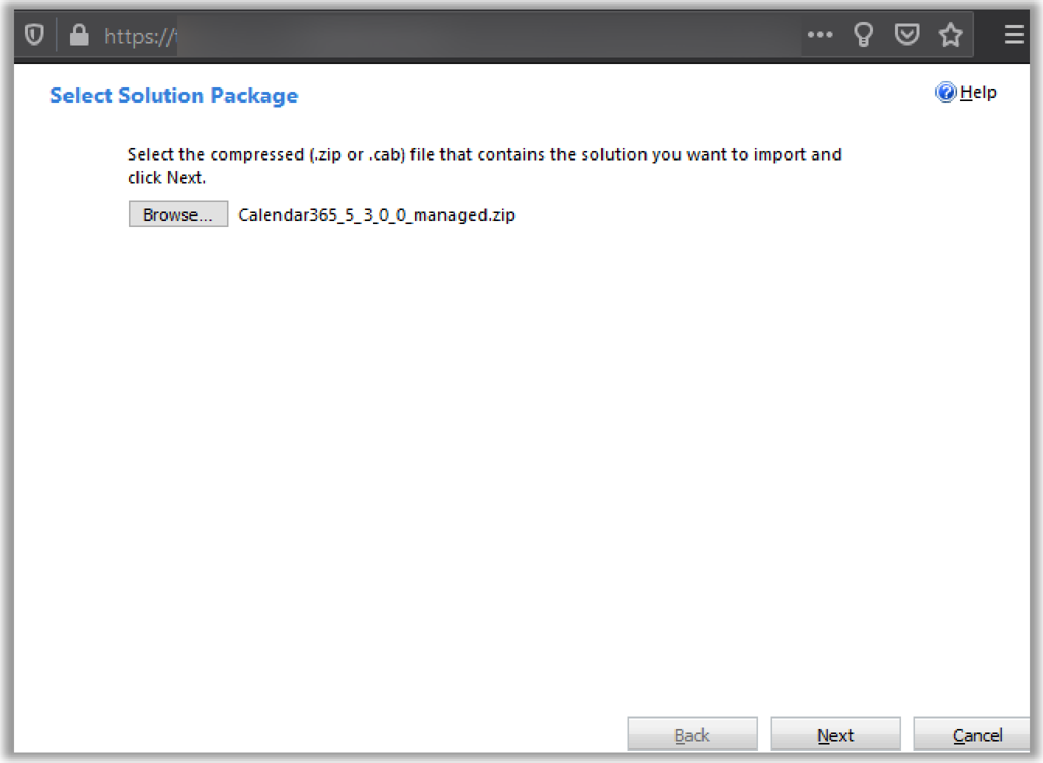
Installation

Installation Steps

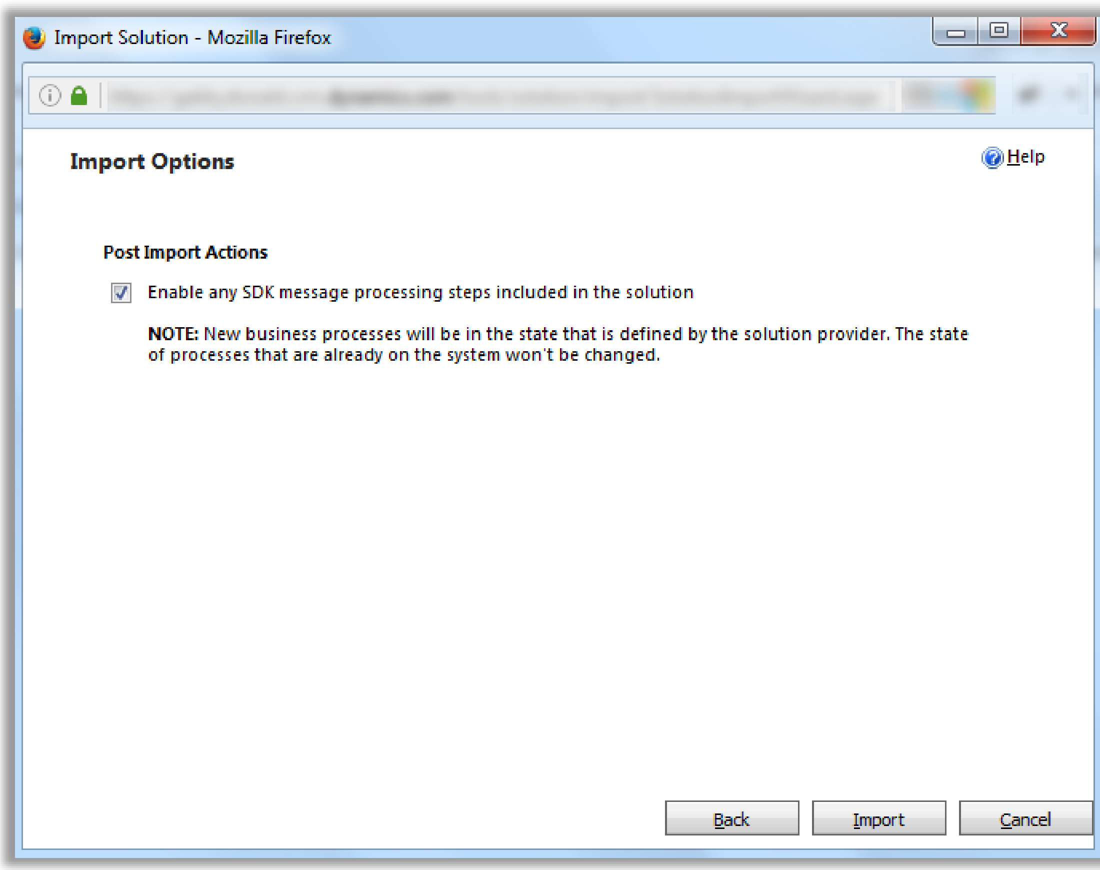
- To install the “Calendar 365” plugin, the following steps are to be followed
- On purchasing the plugin, you will get a zip file named **calendar365_v5.0.zip**
- Login into your CRM Account and click on **Settings -> Solutions**
- Click on **‘Import’** to upload and install the Solution.



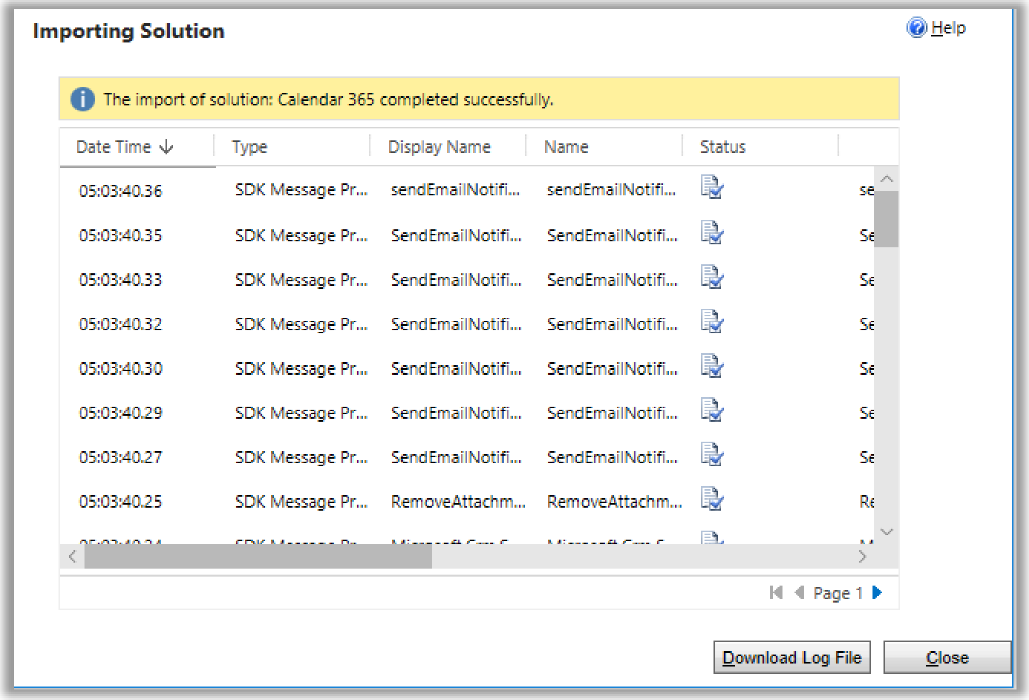
- Click on **‘Browse’** button and choose the Package Zip File for Calendar 365 from the Import Solution Window.



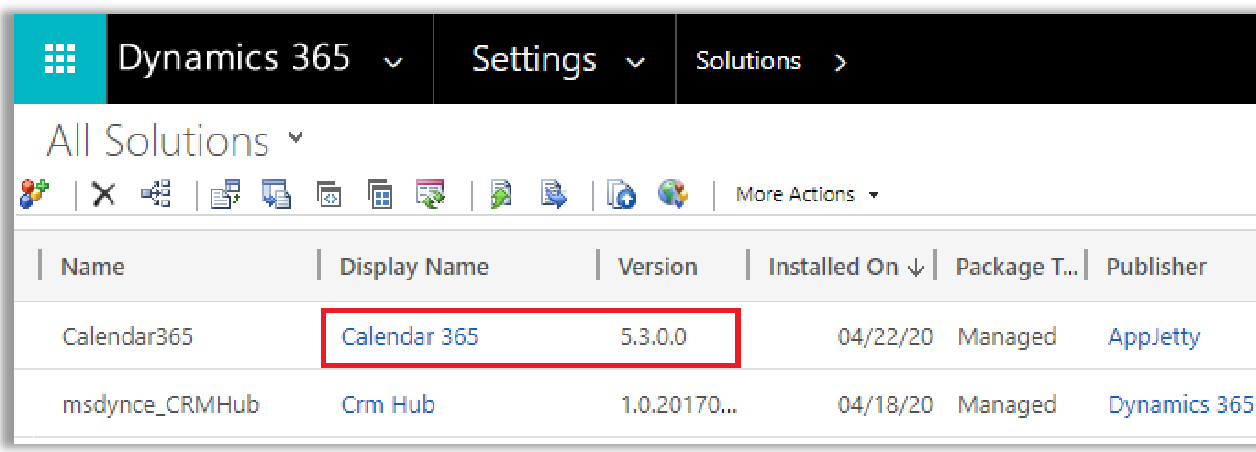
- Click on **Next** for further processing.



- Check the box to enable any SDK message processing steps included in the solution and click on **'Import'** button to Import the Solution. It opens the new window that shows the process of importing solution.

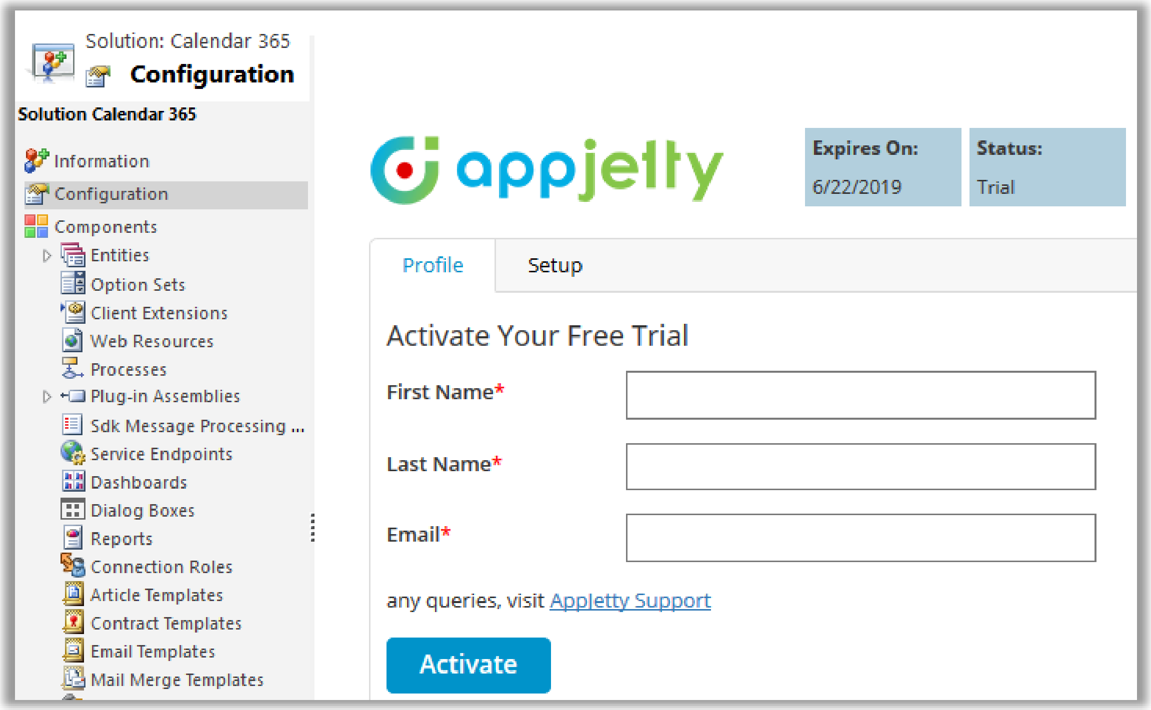


- Click on **'Close'** button after successful completion message is displayed.
- Once you import the solution, it will be displayed in the solutions grid view.

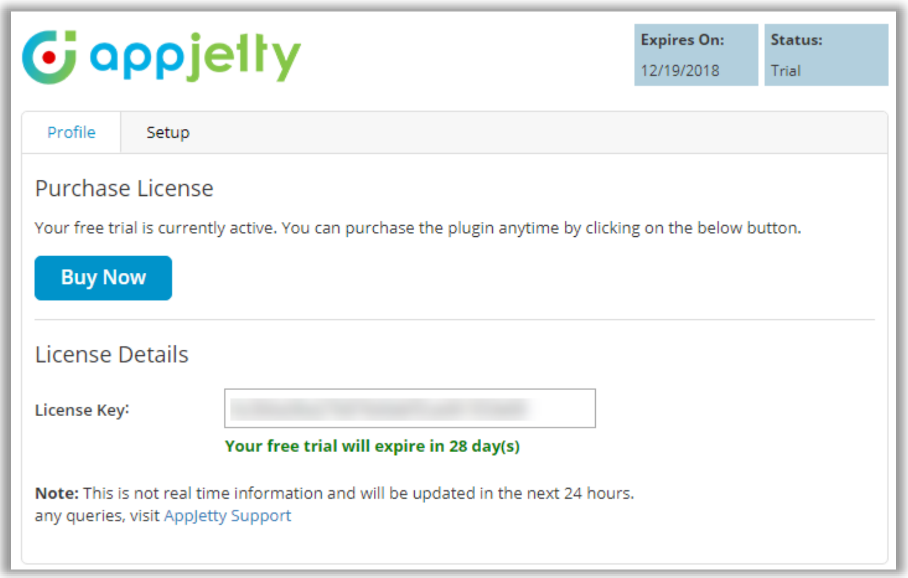


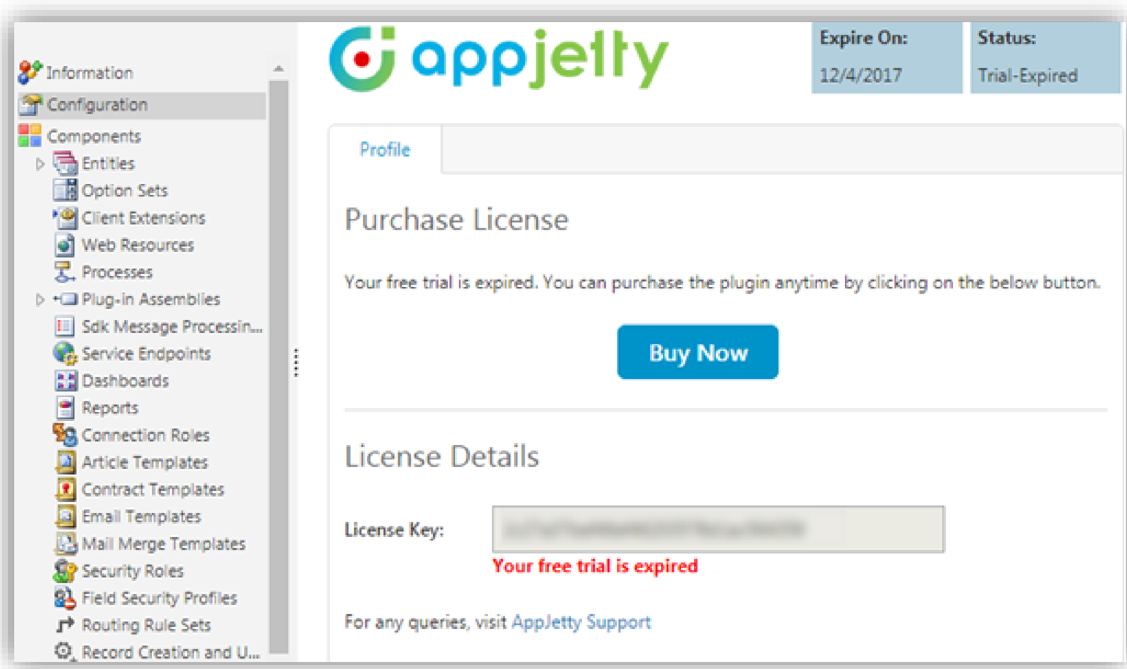
Free Trial and Activation

- Double click on **'Calendar 365'** display name to configure the plugin with your license key.
- This will open a new window. Click on **'Configuration'** from the options provided on the left side panel of the page.

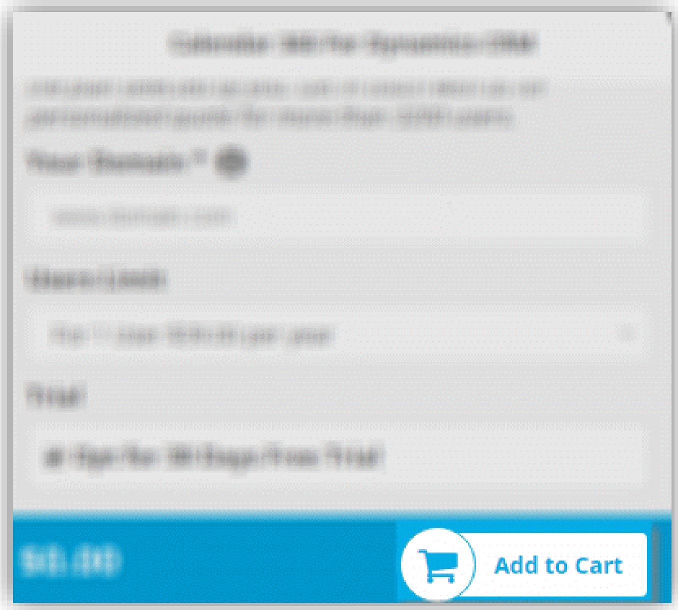


- You can activate your one-month free trial.
- To get a one-month free trial license key fill out the details and click on **'ACTIVATE'** button.
- Your trial will activate, and expiry date will be displayed on top.
- You can purchase the licensed version any time. To purchase the license, click on 'Buy Now' button.

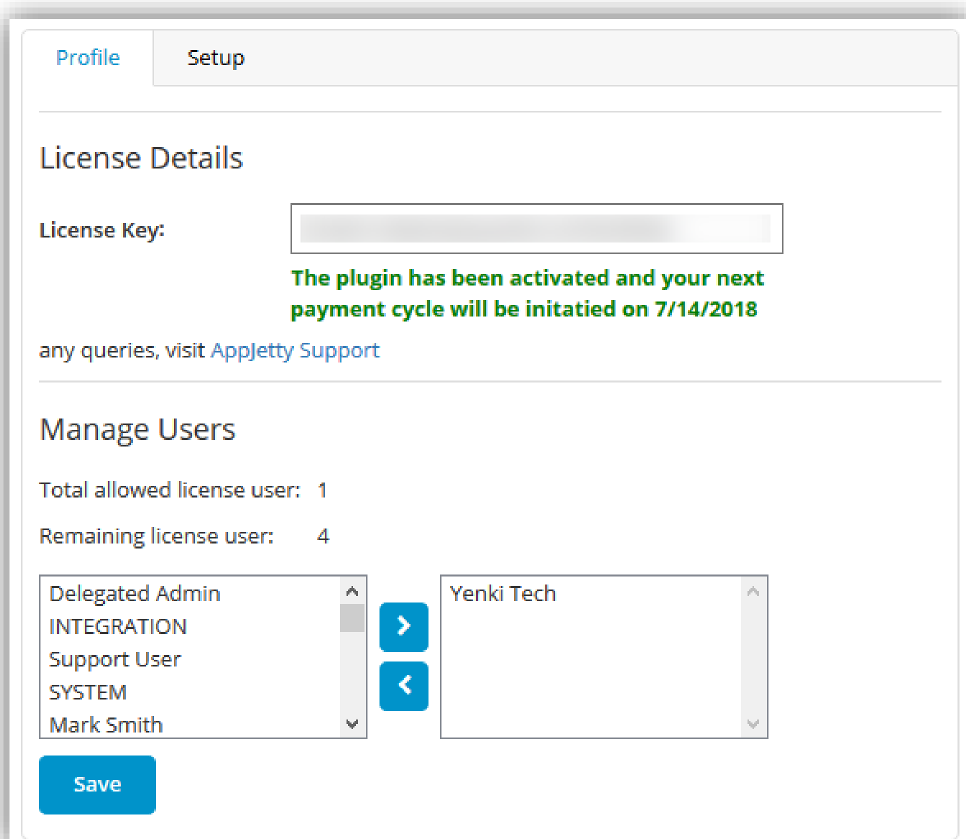




- On expiration of Trial, a message will appear that the trial has expired. Now to purchase the license, click on **'Buy Now'** button.
- This will redirect you to our product page and a pop-up will appear. Click on **'Add to Cart'** button and complete the purchase process.



- On successfully completing the purchase process, you will receive your license key via email along with steps to complete the license configuration.
- Click on **'Activate'** button to activate your license.

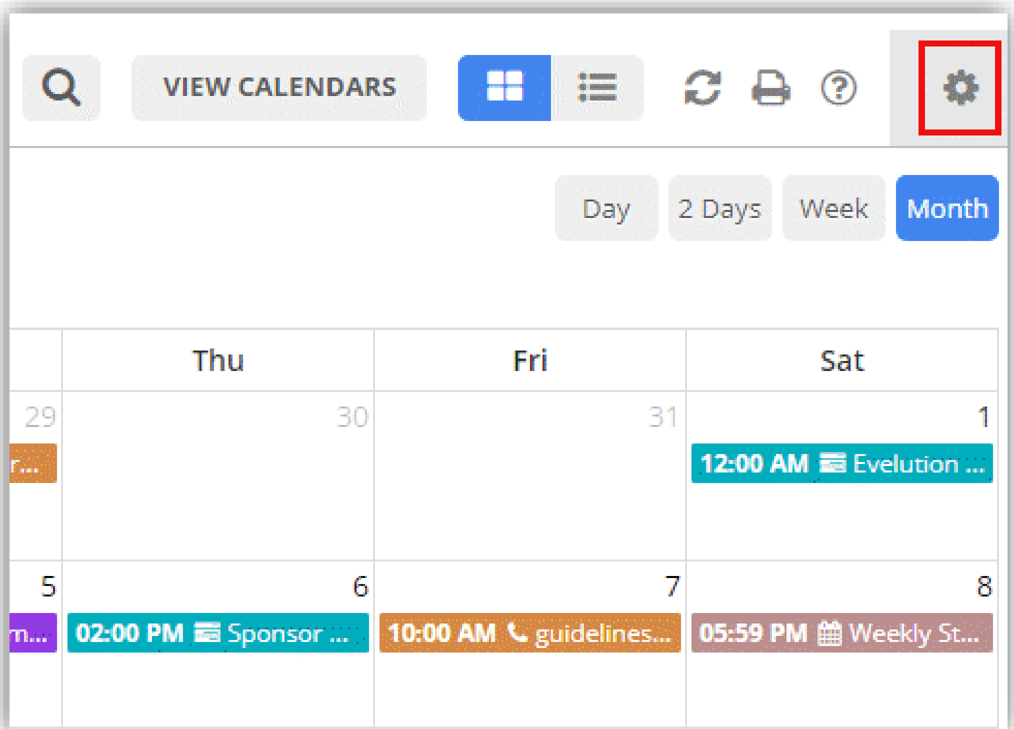


- After submitting the valid license key, you will be navigated to the **Setup** tab.

Configuration Steps

Default Configuration Settings

- To manage the **Default Configuration** settings from the 'Calendar 365', click on the **'Gear'** icon available on the calendar page.

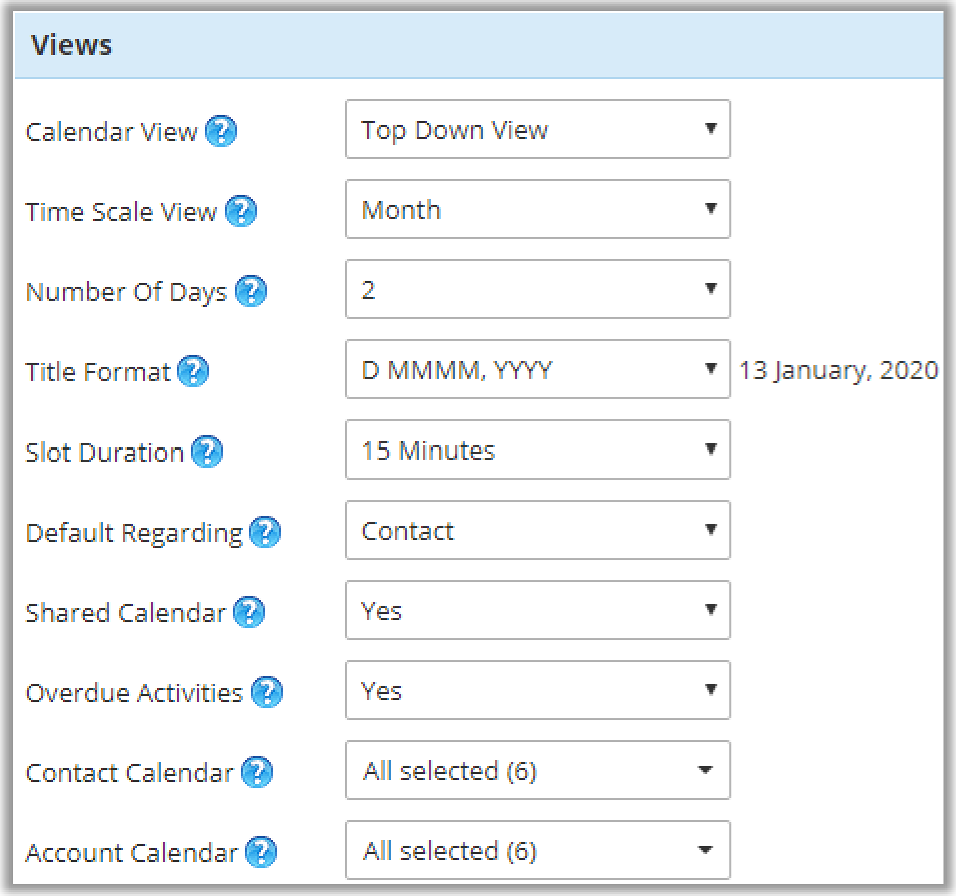


- You can manage **Default Configuration** settings from here for:
    - Views
    - Activities
    - Unscheduled Activities
    - Conflict Management
    - Notifications
    - Holidays
    - Locations
    - Upcoming Events
    - Error Logs
    - Configure Languages

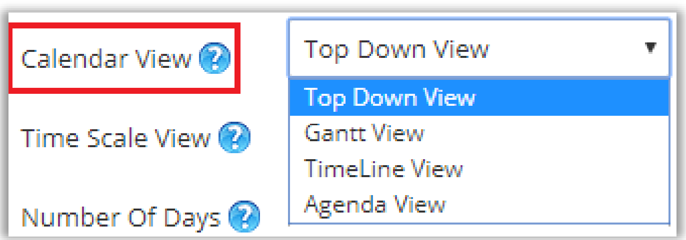
Note: User having **System Administrator** or **AppJetty Calendar 365 Administrator** role can configure the Default Configuration Settings.

Views:

- Configure the default view of the calendar by navigating to the **'Views'** section:



▪ Calendar View:

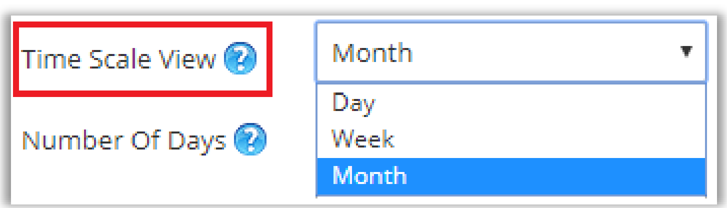


- You can set any of the Default Calendar View of the calendar from the following:

  > Gantt View　　> Top Down View

  > Timeline View　　> Agenda View

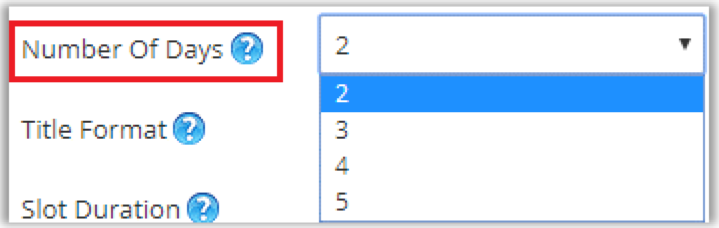
▪ Time Scale View:



- You can set the default Time Scale View of the calendar from the following:

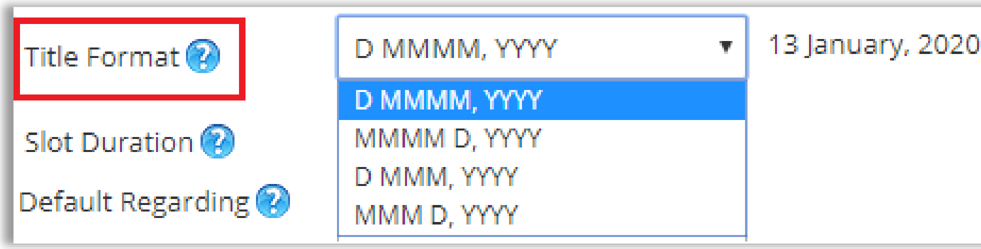
  > Day　　> Week　　> Month

- **Number of Days:**

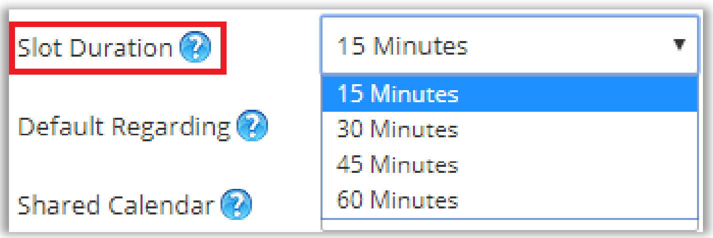


- Select the number of days in which you would like to view the calendar from the Day Span View.

- **Title Format:** Select the format to display on Calendar. The format that you select here will be displayed when you select Day, Day Span and Week view for Calendar.

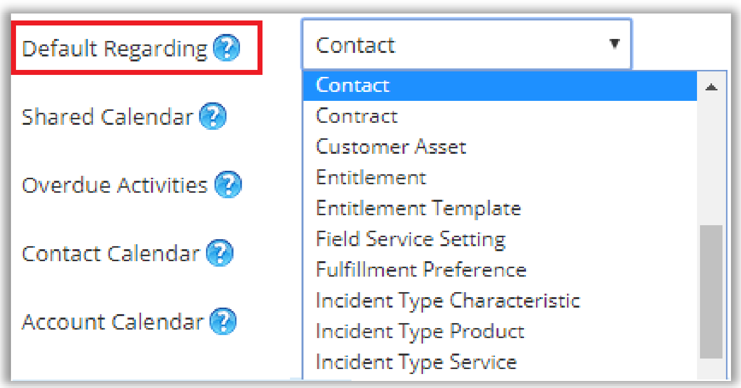


- **Slot Duration:**

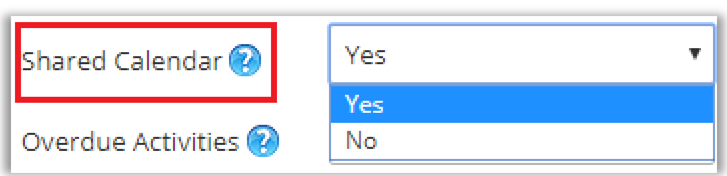


- Select the slot durations for "Top Down view": 15, 30, 45, and 60 Minutes.

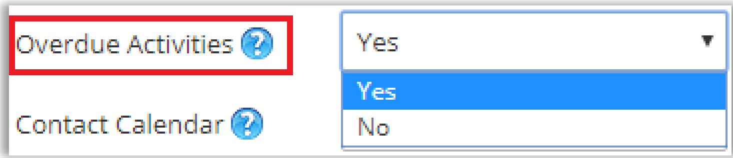
- **Default Regarding:** You can set default 'Lookup Record' entity.



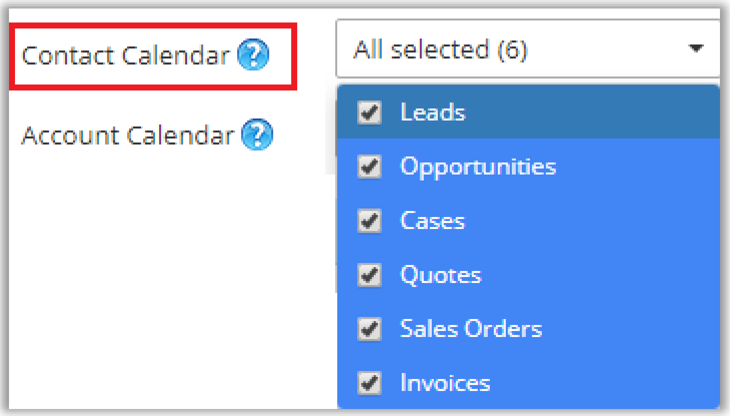
- **Shared Calendar:** If you want to share calendar to another Admin User, select 'Yes'.



- **Overdue Activities:** By selecting 'Yes', the **expired activities** will be highlighted with 'red' alert mark.

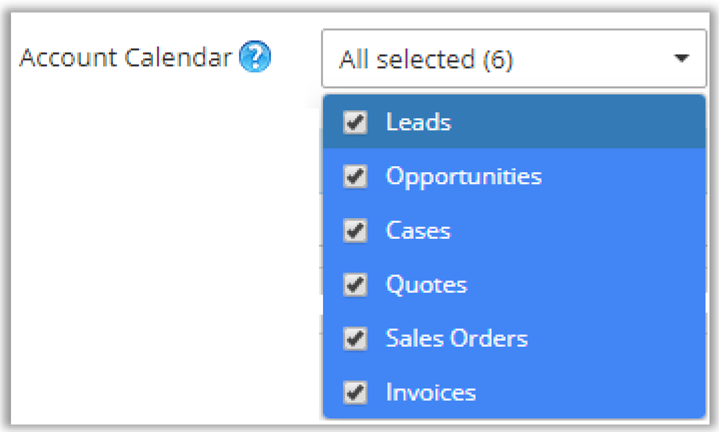


- **Contact Calendar:**



- You can select entities related to contact you want to include in calendar.
- Entities related to contact are Leads, Opportunity, Case, Quote, Sales Order, Invoice.

- **Account Calendar:**

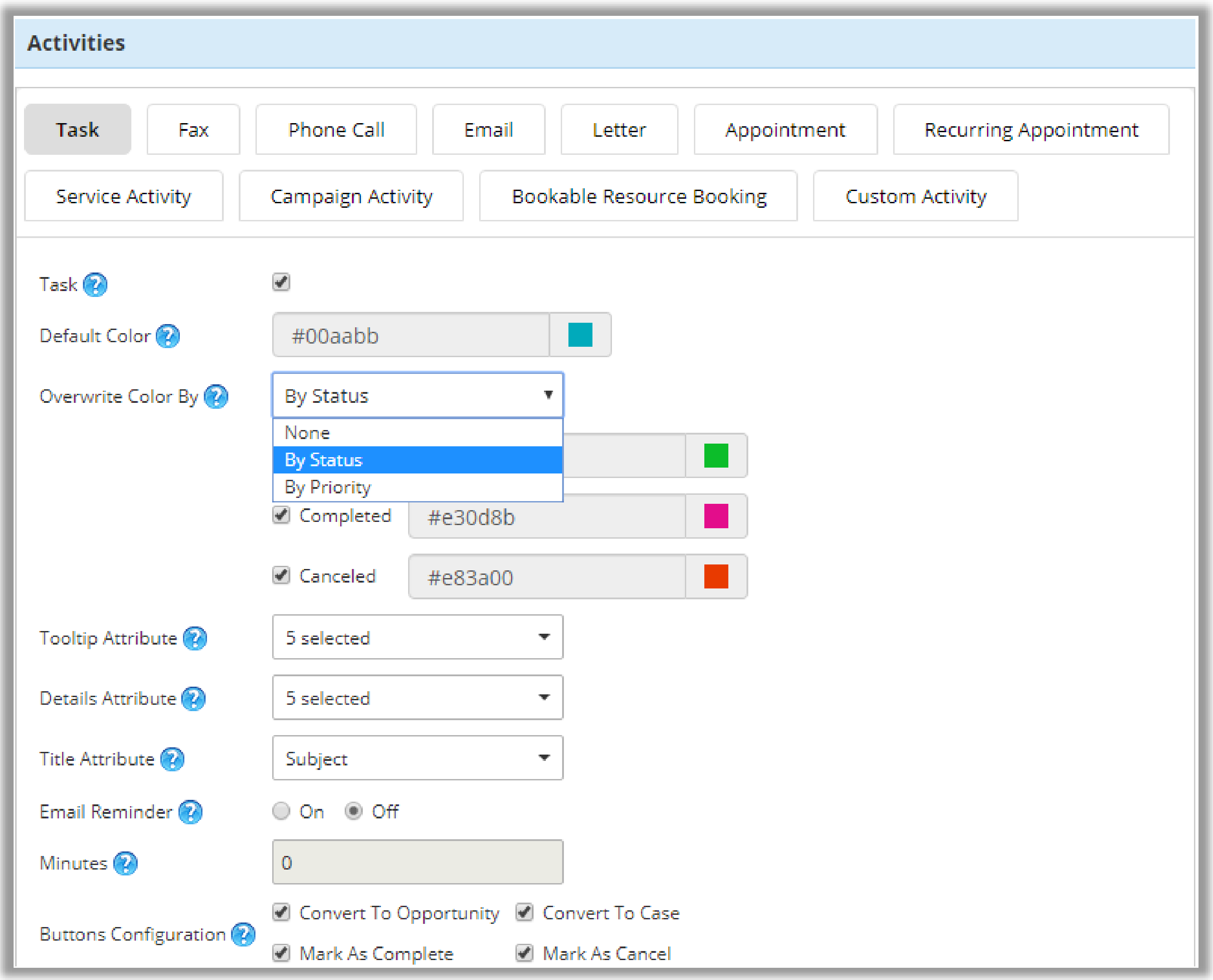


- You can select entities related to account that you want to include in calendar.
- Entities related to account are Leads, Opportunity, Case, Quote, Sales Order, Invoice.

Note: The entities those are added from set up page will be available in the calendar for user to select from.

Activities:

- To configure the **Activities** of the calendar, navigate to the **'Activities'** section.
- It will include tabs for Task, Fax, Phone Call, Email, Letter, Appointment, Recurring Appointment, Service Activity, Campaign Activity, and Custom Activity and each of the activity tab will contain following fields:
  - **Task:** You can check the checkbox display the Task (activity) in the calendar by default.
  - **Default Color:** You can select the default color for the activity to be displayed in the calendar.

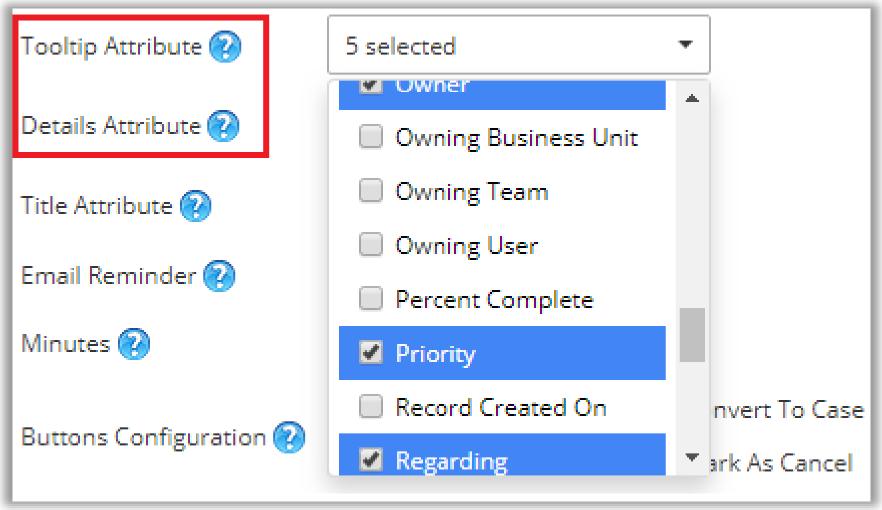


  - **Overwrite Color By:** You can select Overwrite Color as **By Status** & **By Priority**.
    - If you want to select the color as per the "activity status", you can select the color for **Open**, **Completed** and **Canceled** status.

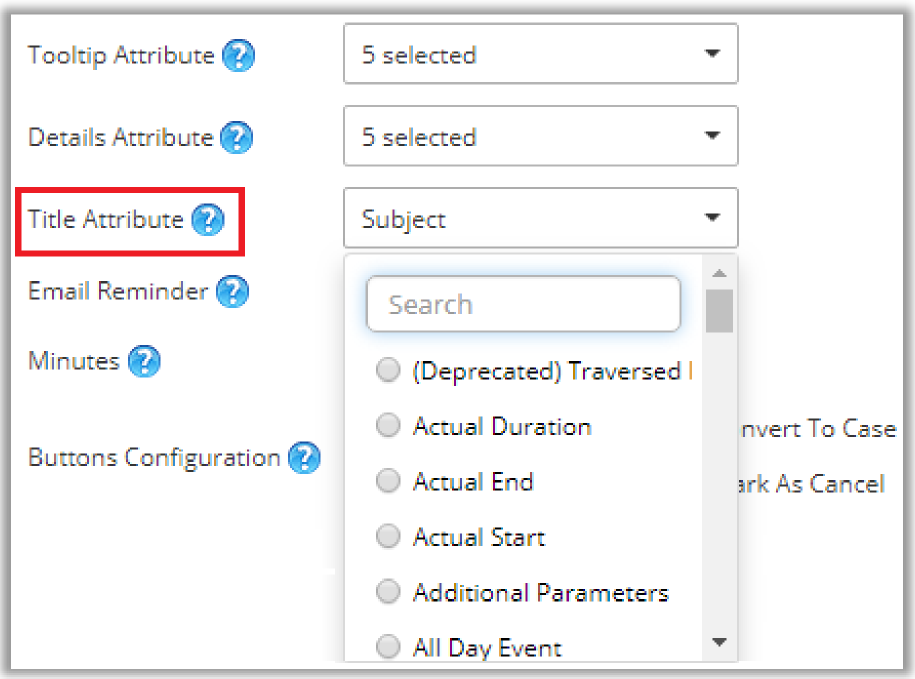
> **Note:** For Appointment, Recurring Appointment and Service Activity, you can select color for Schedule status.

    - If you want to overwrite the color as per "priority", you can select the color for **High**, **Medium** and **Low priority**.

- **Tooltip Attribute:** You can select the **tooltip attributes** from the list of different attributes to be included in activity tooltip that appears on **hovering** the activity in the calendar.
- **Details Attribute:** You can select the **details attributes** to be included in activity detail that appears **on clicking** the activity in the calendar, from the list of different attributes available.
- For both the list, you can select maximum **10 attributes** and **minimum one** attribute or else it will show validation message stating to select at least one attribute.



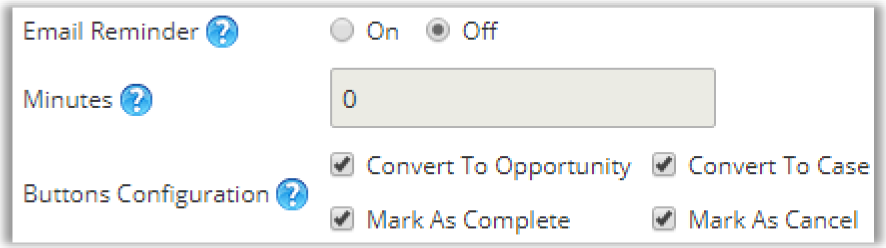
- Check the boxes besides attributes that you wish to include.
- **Title Attribute:** You can select the **title attribute** to be displayed as the **title** of activity in calendar. The 'Title Attribute' comes with default selection of **Subject** attribute. You can select only one attribute from the list of different attributes.



- **Email Reminder:** You can enable / disable the email reminder for an activity.
  - **On:** Choose **'On'** to enable Email reminder of the activity
  - **Off:** Choose **'Off'** to disable Email reminder of the activity

> **Note:** Once you have enabled the **'Email Reminder',** you will receive a reminder email for the activity. User who has created the activity will receive the mail on the email address configured during account creation.

- **Minutes:** Enter the number of minutes before which you want to send the reminder for the activity through email to the users included for the specific activity.



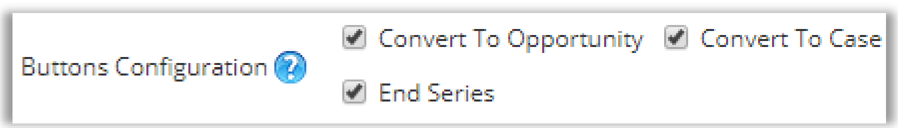
- **Buttons Configuration:** Select the action buttons that you need to include in the calendar. These action buttons are the ones which if enabled lets you perform those actions directly from the calendar. Here activities like Task, Fax, Phone Call, Letter, Appointment, Service Activity, Custom Activity have actions buttons for:

  > Convert to Opportunity   > Convert to Case

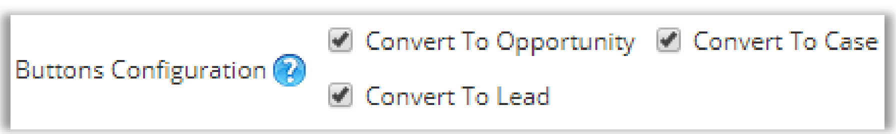
  > Mark as Complete   > Mark as Cancel

- All the following activities have different action button.

Recurring Appointment: 'Recurring Appointment' activity has **End Series** button in additional.

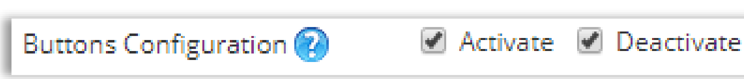


Email Activity: 'Email' has **Convert to Lead** button.



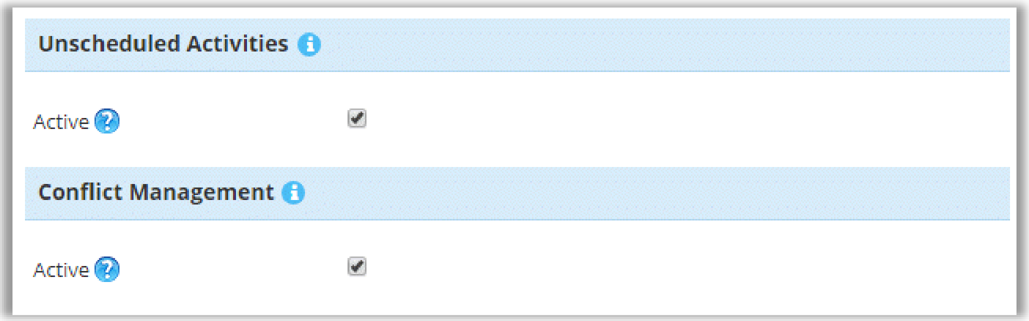
Campaign Activity: 'Campaign activity' has **Close Campaign Activity** button in addition.

Bookable Resource Booking: 'Bookable Configuration' has Activate / Deactivate buttons.



Unscheduled Activities:

- To manage the unscheduled activities, check the Active box. By default, it is disabled.
- On enabling Unscheduled Activities option, you get to manage unscheduled **appointments** and **service activities** one without required **attendees** and **assigned resources** respectively from the calendar.

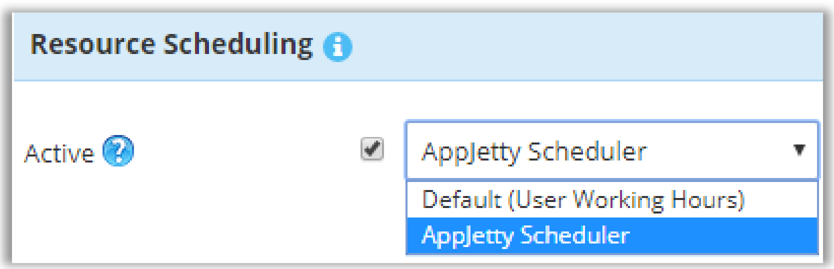


Conflict Management:

- To get alerts for conflicting activities based on time, check the Active box to enable **conflict management** in the calendar. On enabling conflict management, you get **alert message** when conflicts occur at the time of scheduling of appointments or service activities.

Resource Scheduling:

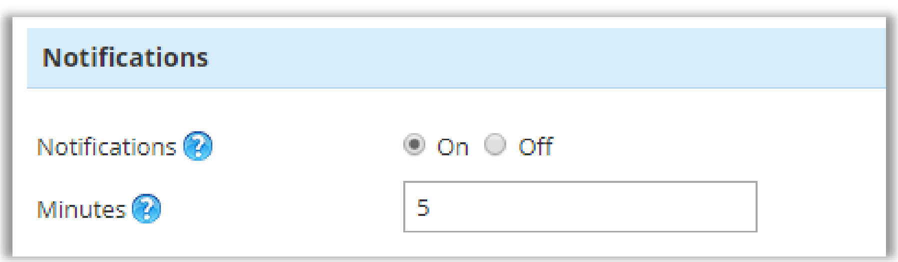
- To enable the "Resource Scheduling" module, 'check' ☑ the check box. After selecting this option, you can select the **Default (User Working Hours)** *or* **AppJetty Scheduler**.



- Based on your selection, working hours of users or your team members will be displayed in the calendar.

Notifications:

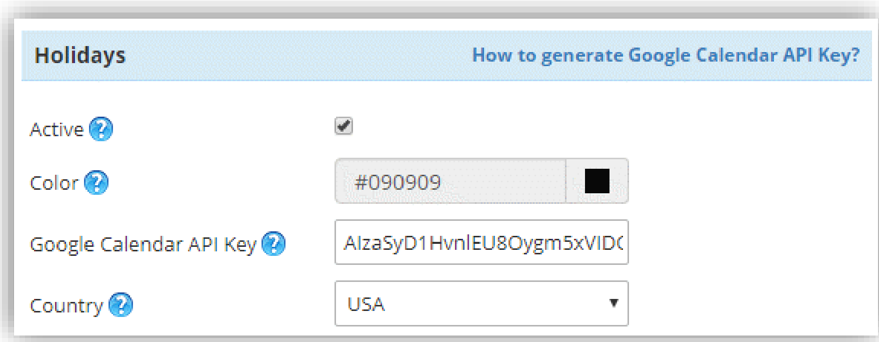
- To manage the notification reminder of the activities, navigate to the **'Notifications'** section.
- You will get the notification reminder about upcoming activity when you are on Calendar page.



- It will include following fields:
  - **Notifications:**
    - To enable the notification reminder of the activity, click **'On'** button. By clicking on the **'On'** button the **'Minutes'** field will be enabled.
    - To disable the notification reminder of the activity, click **'Off'** button. By clicking on the **'Off'** button, the **'Minutes'** field will be disabled.
  - **Minutes:**
    - Insert the minutes before which you want the notification reminder of the activity.

Holidays:

- To manage the holidays, navigate to 'Holidays' section

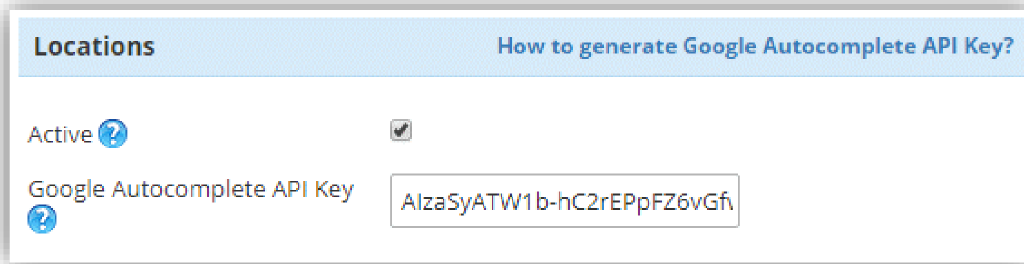


- It will include following fields:
  - **Active:** Check the checkbox to activate the holidays in the calendar
  - **Color:** Set the color to be displayed for the Holiday in the calendar
  - **Google Calendar API Key:** Enter the Google Calendar API Key for the holidays to be displayed in the calendar as per your selected country.
  - **Country:** Select the country whose holidays are to be displayed in the calendar.

Note: To generate the Google Calendar API Key refer to: https://console.developers.google.com/apis. You can directly navigate to this page from the configuration page by clicking on the available link.

Locations:

- To activate location suggestions in the calendar, navigate to **'Locations'** section and check the active box to enable them.

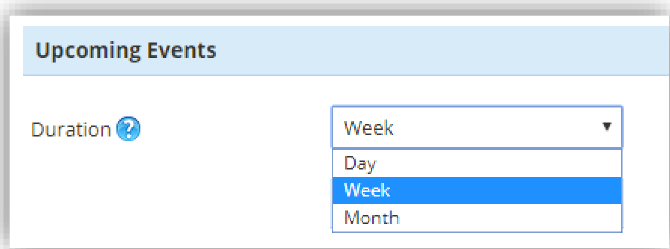


- If enabled, you need to enter Google Autocomplete API key that you have in order to get location suggestions.

Note: To generate the Google Autocomplete API Key refer to: https://developers.google.com/places/web-service/autocomplete. You can directly navigate to this page from the configuration page by clicking on the available link.

Upcoming Events:

- You can set the default view of the **'Upcoming Events'** from this section. It will contain following fields:

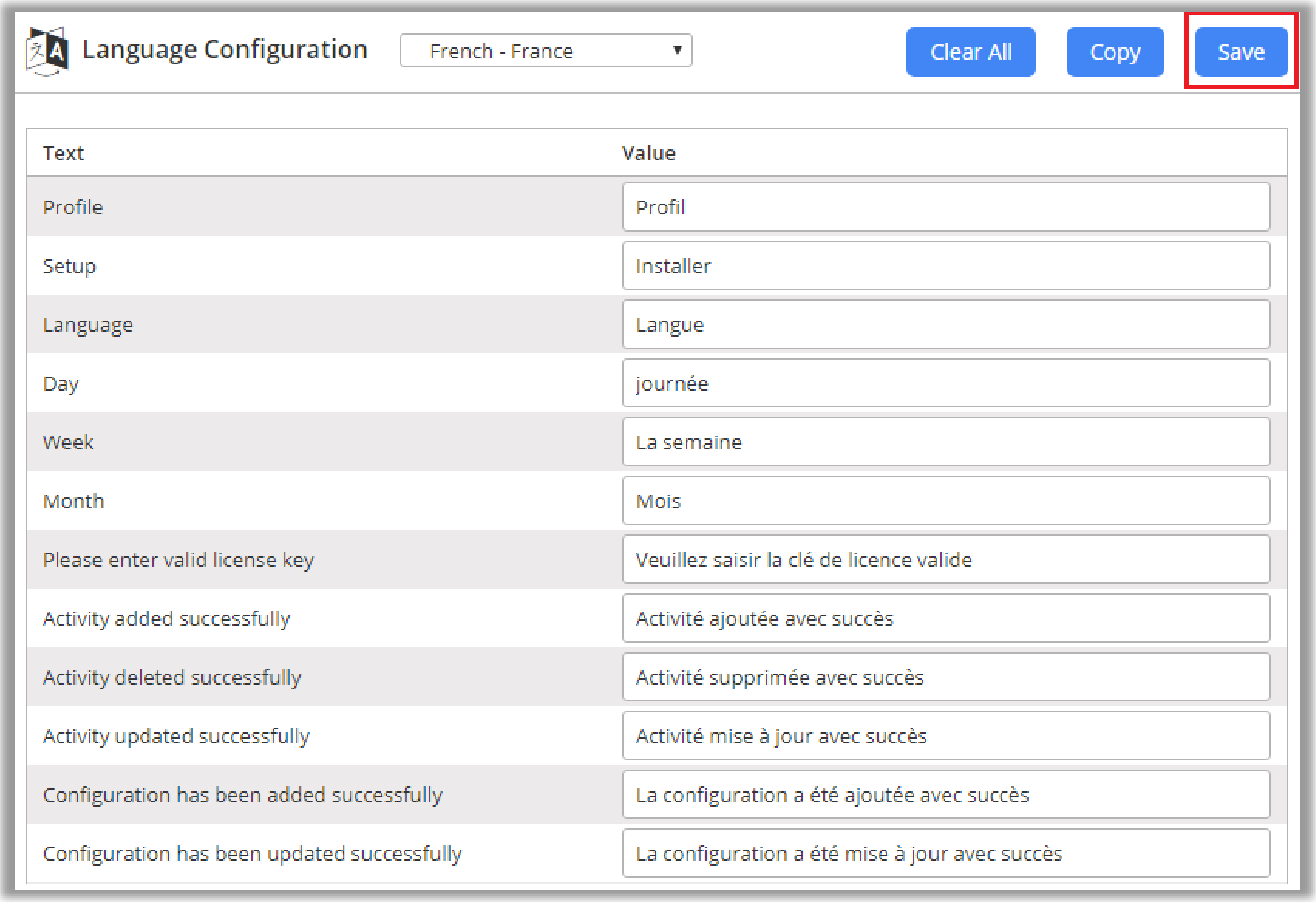


- **Duration:** You can select the any of the default view for **'Upcoming Events'** from the Day, Week or Month.

- **Save:** Click on **'Save'** button to save all the configurations settings for Calendar 365.

Configure Languages:

- You can also configure language of your choice by clicking on Configure Languages button available on Configurations page.
- On configure language page, select the language from dropdown that you wish to configure messages for.

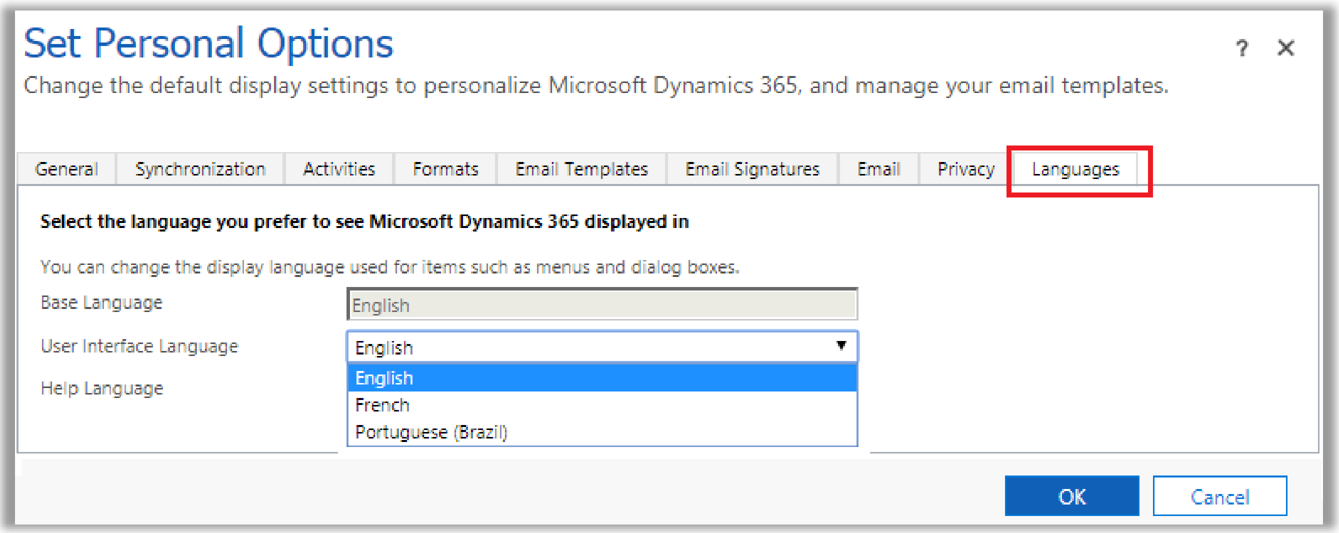


- Here, user needs to add translations themselves for the messages in the language of their choice.
- Click on save button to save the language translations.

Note: For configuring languages, user first needs to manage language settings from CRM. Languages that are selected in CRM can be configured for the calendar.

Multi-language Calendar labels

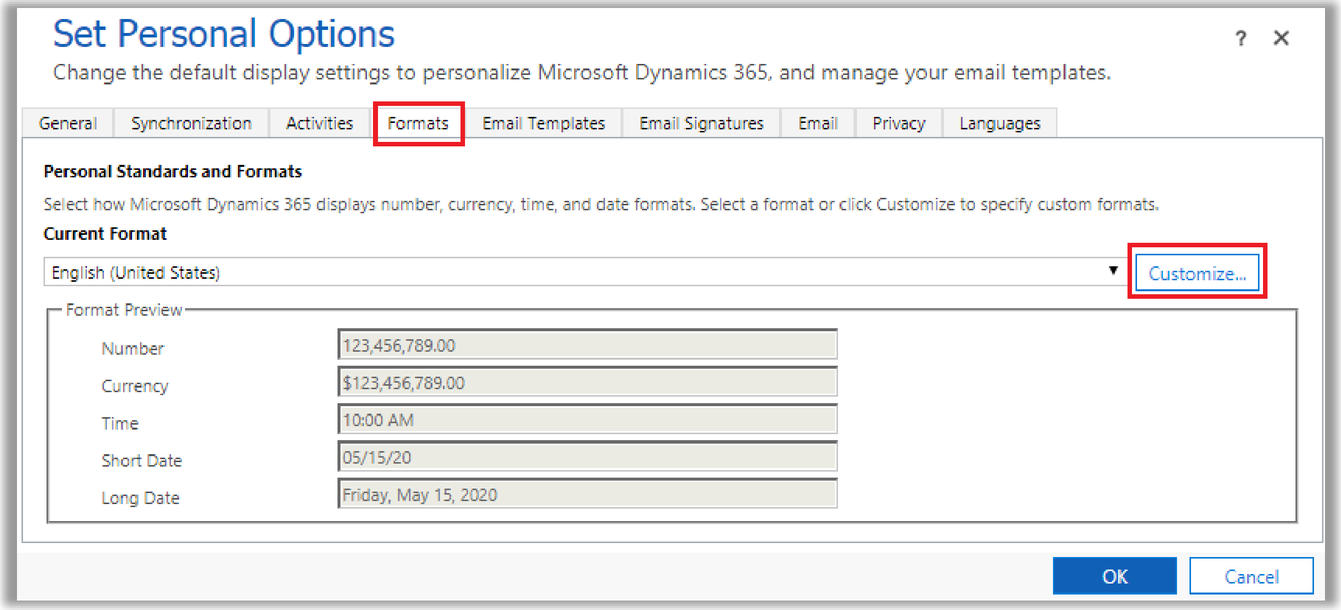
- You can select the different languages for the labels of the default CRM on the Calendar365.
- Navigate to **Settings** → **Personalization Settings** → select the **Language** Tab. From here, select the language for the **User Interface** in which you want to see the labels for Calendar 365.



- After selecting the language, click the **OK** button to save the settings. Now, you can see the labels in the Calendar365 as per the selected language.

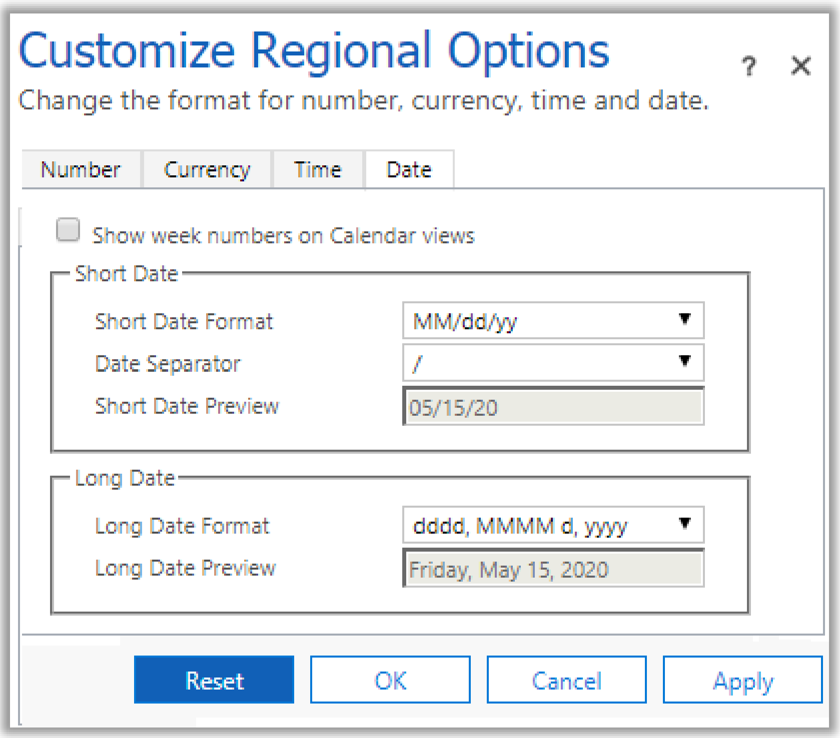
Dynamic Date Formats

- Navigate to **Settings → Personalize Settings → Formats** to select the Date & Time Format to display in the date & time picker of the Calendar365.



- Now click on the **Customize** button, the Customize Regional Options window will open.

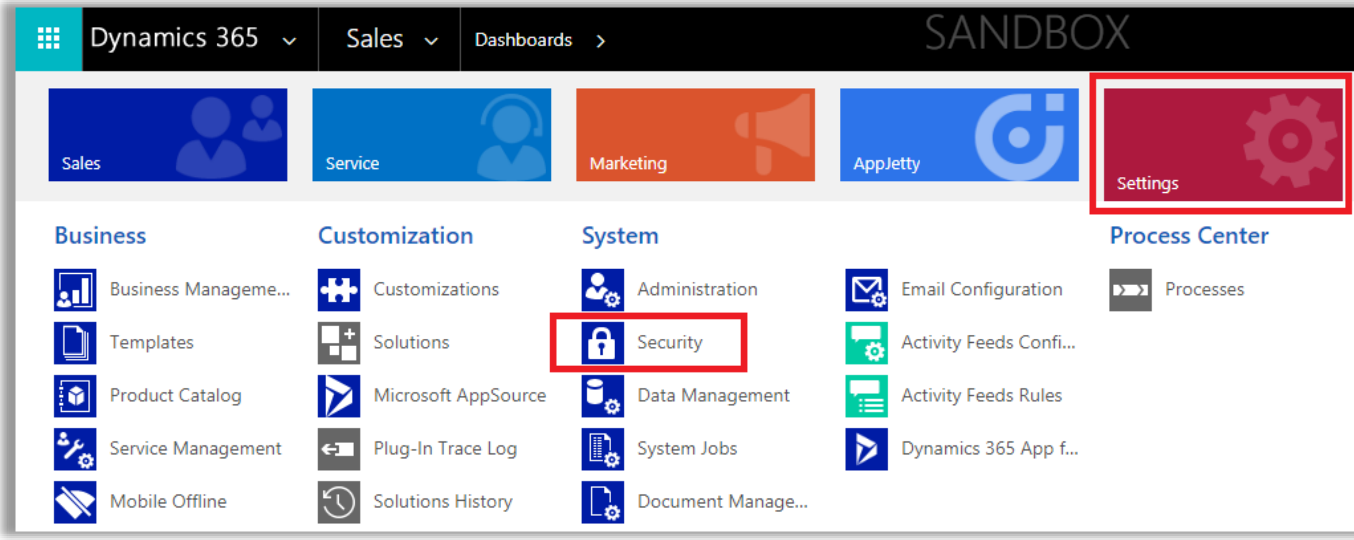
- You can select the Date Format i.e. MM/DD/YY or DD/MM/YY and Separator.



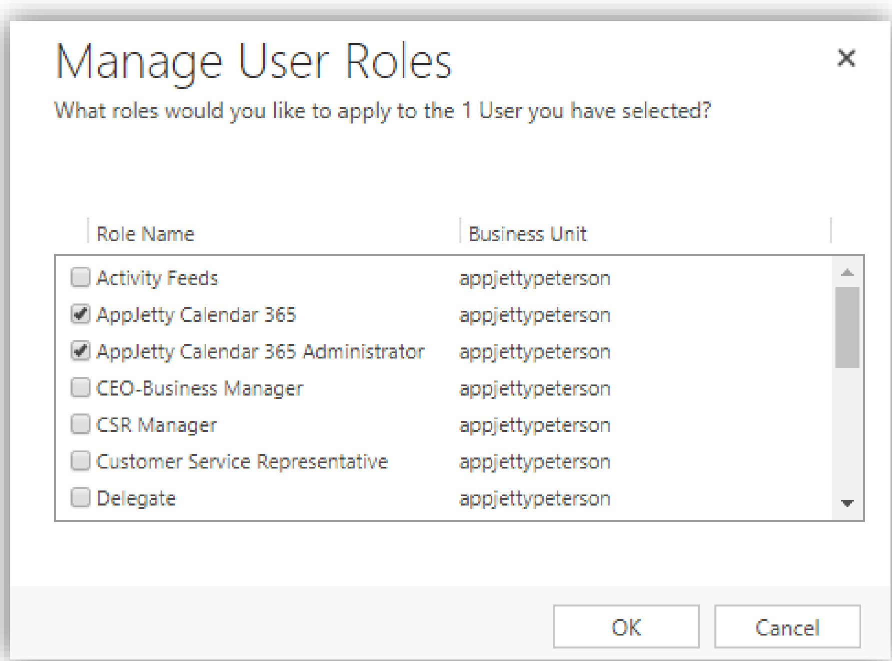
- Based on the format selection here, you will get the date format in date picker of Calendar365.

Assign User Role:

- To manage the user roles, navigate to **Settings -> Security -> Users**.



- Now select the users whose roles are to be managed and click on ‘MANAGE ROLES’. This will open a pop up to select roles.
- To access AppJetty product entities, assign ‘AppJetty Calendar 365’ role to selected users.



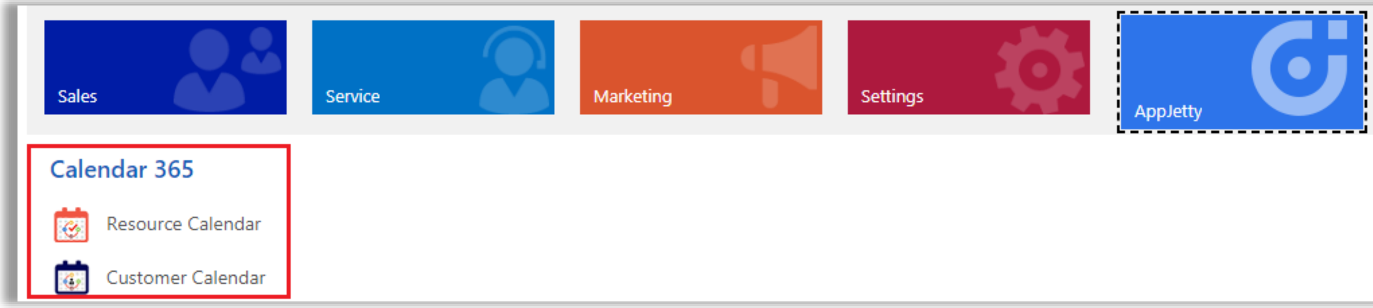
Note: System Administrator will also be able to access AppJetty Product Entities.

Calendar Management

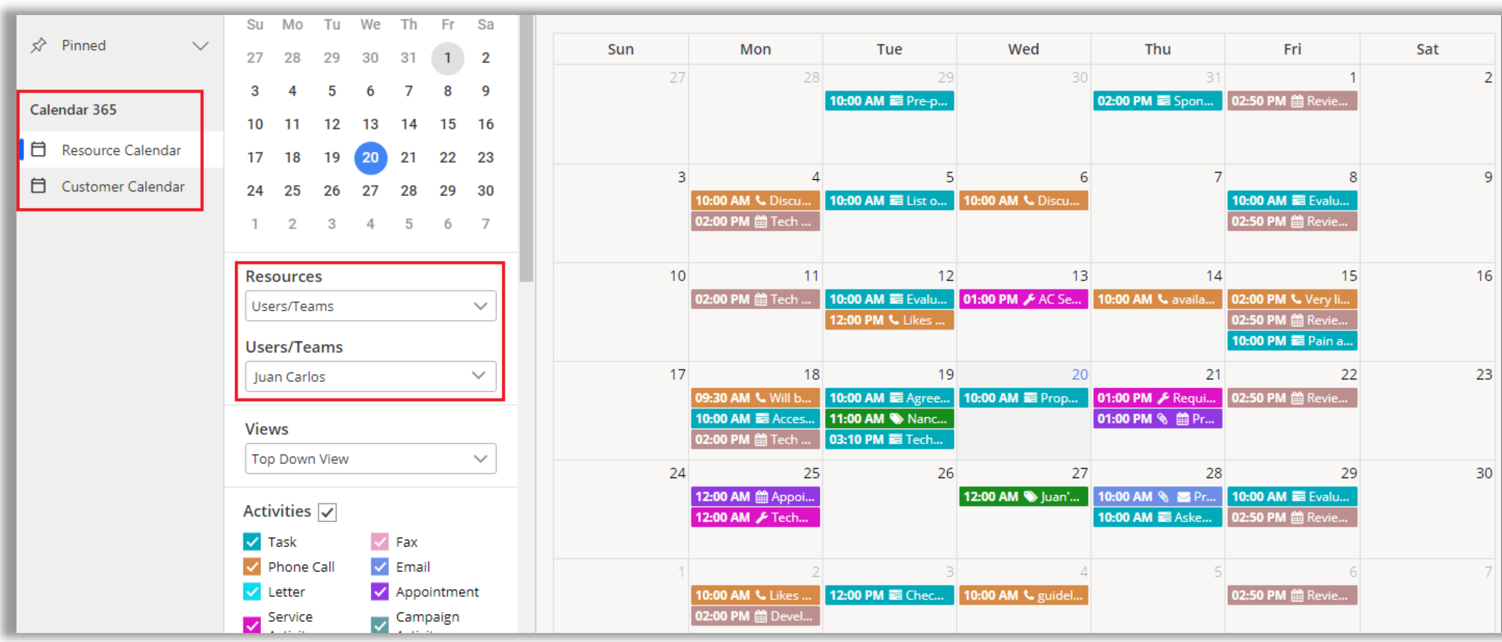
Calendar Management: You can check how to manage the activities and the functionalities of Calendar.

- Resources
  - Resource Calendar
  - Customer Calendar
  - Related Entities
- Activity Details
  - Tooltip view
  - Detail view
- Left side Panel
  - Activities
  - Status
  - Priority
  - Weekend & Holidays
  - Upcoming Events
- Refresh
- Save and Share Calendar Views
  - Update Calendar
  - Share Saved Calendar View
  - Move Shared Calendar to Save Calendars list
- Activity Grid View of Calendar
- Set Regarding
- Resource Scheduler (Manage Working Hours)
- Add the Working hours in AppJetty Calendar
- Dynamic Date Format

- To open the Calendar 365, following steps must be followed:
- Go to **AppJetty -> Calendar 365**



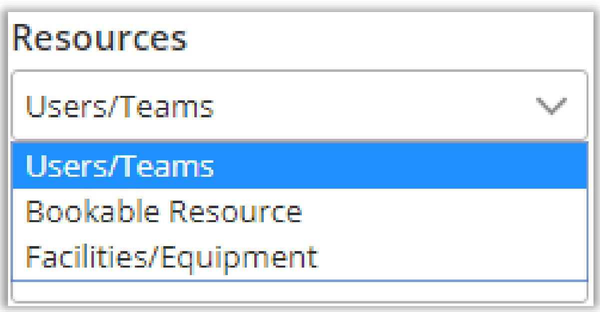
- Here, you get two calendars: **Resource Calendar** & **Customer Calendar**.
  - Resource Calendar: It is for **User** and **Facility/Equipment**.
  - Customer Calendar: It is for **Contacts** and **Accounts**.
- If you want to manage activities for the Users/Teams, Bookable Resource *or* Facilities/Equipment, select Resource Calendar while to manage activities for Contacts/Accounts (clients), select Customer Calendar.

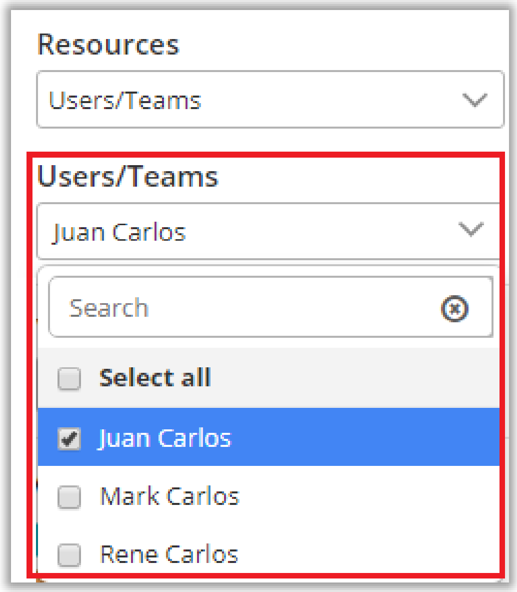


- Calendar page would load, and all the activities will be displayed in the calendar as per the **default configuration** made from the settings.

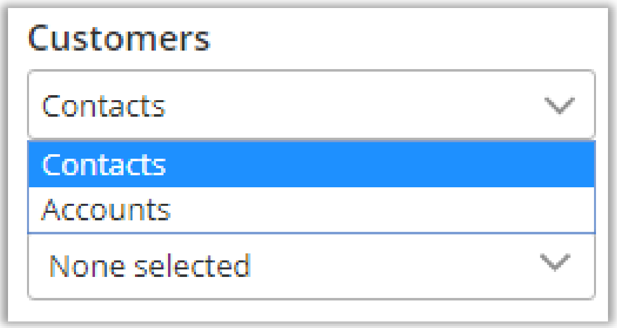
Resources

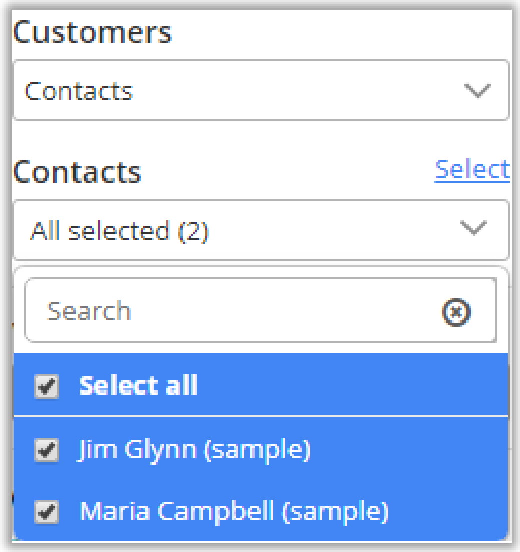
- In **Calendar 365 V5.2**, the calendar is separated in two: **Resources Calendar** and **Customer Calendar**.
- To view the navigate to **'Resources'** section on the left-hand side of the calendar
- Resource Calendar: "User/Teams", "Resource Booking" and "Facilities/Equipment" resources can be found in Resource Calendar.
    - If **User/Teams** option is selected as resource, it displays list of users in multiple selection dropdown. User/Teams is a user and a member of your organization.
    - If **Bookable Resource** option is selected as resource, it displays list of Bookable Resource in multiple selection dropdown. A Bookable Resource in Field Service is anything that needs to be scheduled. Scheduling Board for Field Service & Project Service Automation.
    - If **Facilities/Equipment** is selected as resource, it displays list of facility/equipment in multiple selection dropdown. If the resource is a physical space that needs to be scheduled, such as a building or room, select Facilities/Equipment.





- Upon selection of resource, from the other drop down, you can select users for which you need to view activities.
- Customer Calendar: You will get "Accounts" and "Contacts".
    - If **Contact** is selected as resource, it displays list of contacts in multiple selection dropdown. These are available only when contacts are selected from the dialog box.
    - If **Account** is selected as resource, it displays list of accounts in multiple selection dropdown. These are available only when accounts are selected from the lookup dialog box.
- Based on Customers selection, activities in the calendar will be displayed.



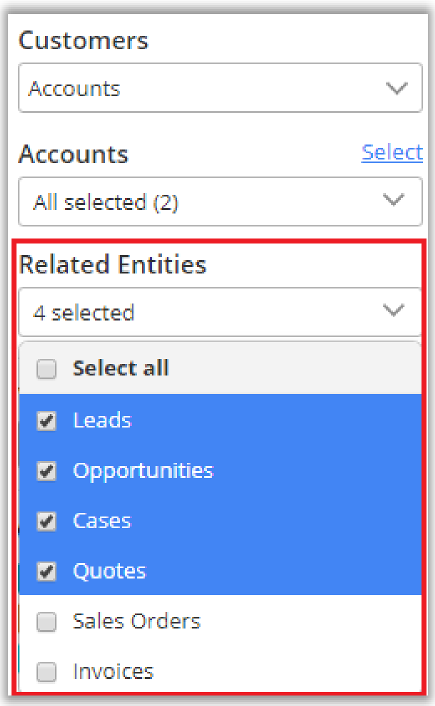


Note: Only the system administrator can view the calendar along with the activities of all the users or resources. Other users can view the calendar of only their team or an individual depending on their respective role.

Activities that have account or contact mentioned within regarding field, those activities are viewed in calendar upon selection of that account or contact respectively.

Related Entities

- On selecting accounts or contacts as Customers, **Related Entities** dropdown is enabled from where user can select one or more related entity of account or contact related to which you want to view activities.

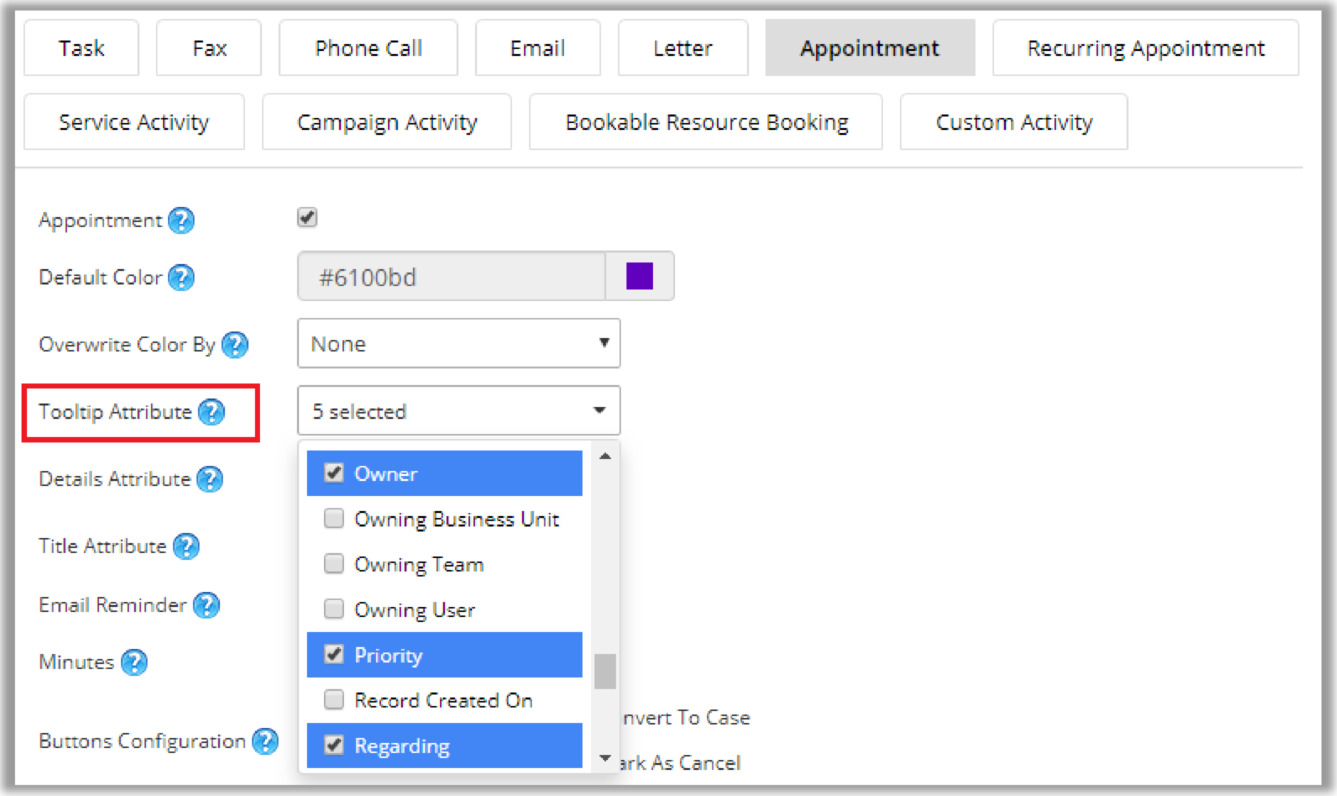


Note: Related entities dropdown will be shown only if entities are selected from the configurations page. And activities will be shown if these related entities have activities created within their record.

Activity Details

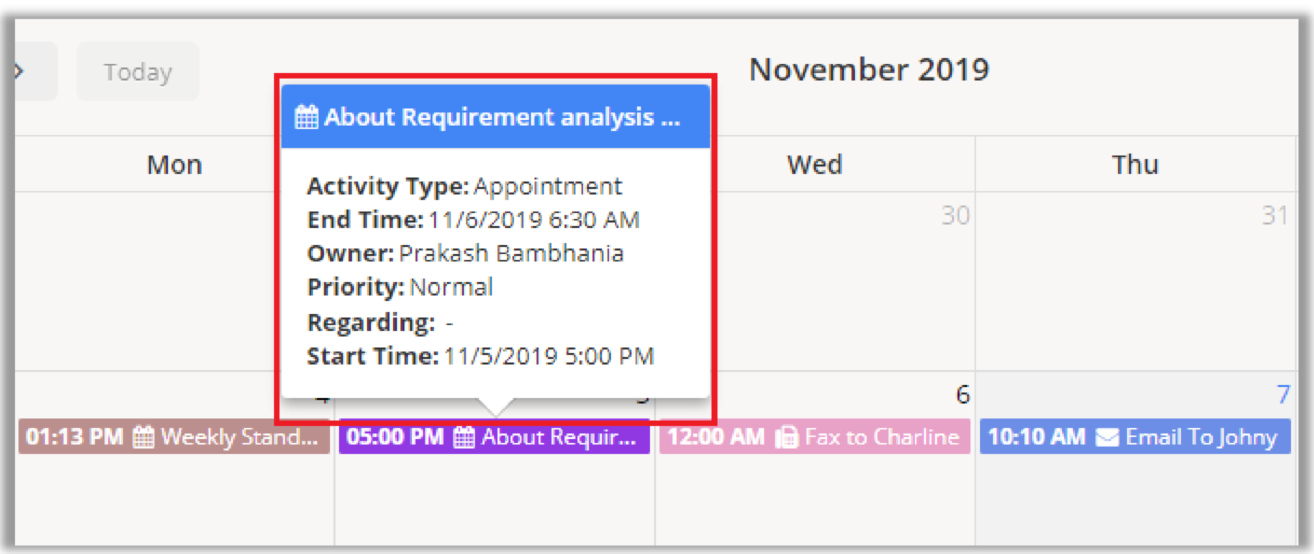
Setup for Tooltip Attribute & Tooltip view:

- To setup the Tooltip view of activity, navigate to **Setup** and you will find the 'Tooltip Attribute' option in all the activity.



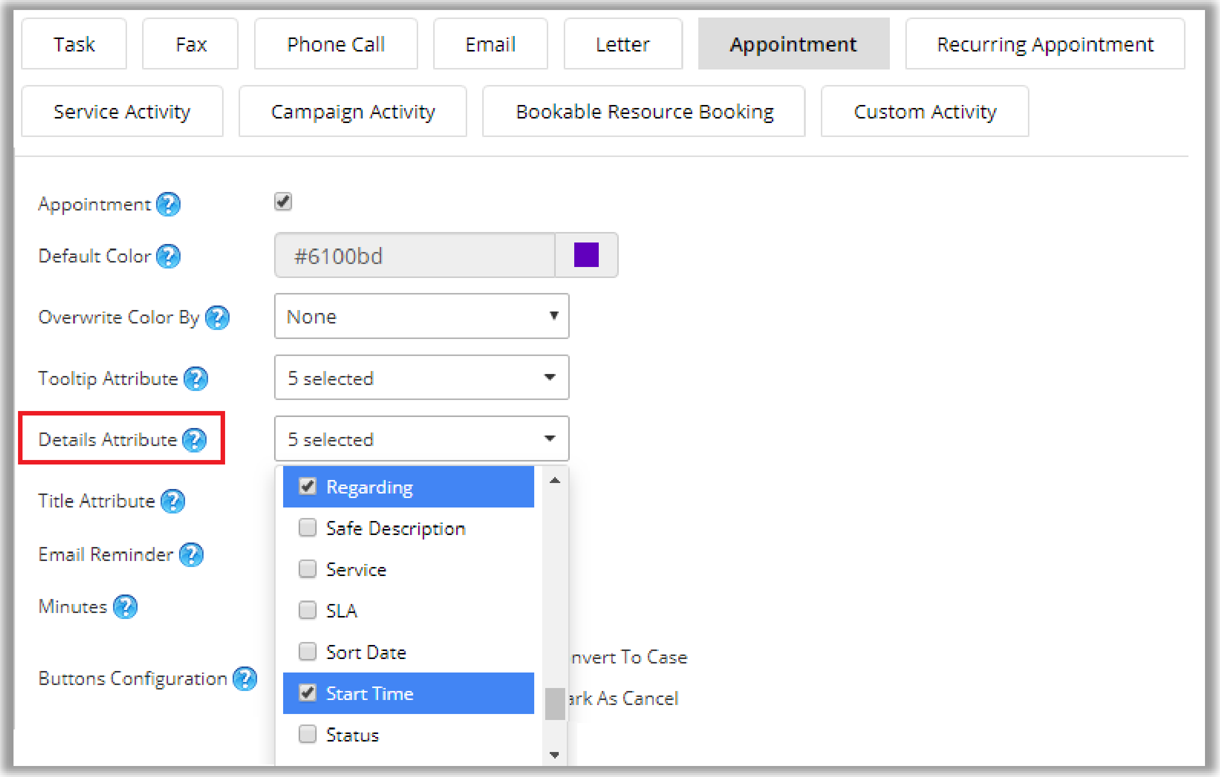
Tooltip on Calendar

- Hover the mouse on the activity, then the activity details can be seen in **tooltip view**.



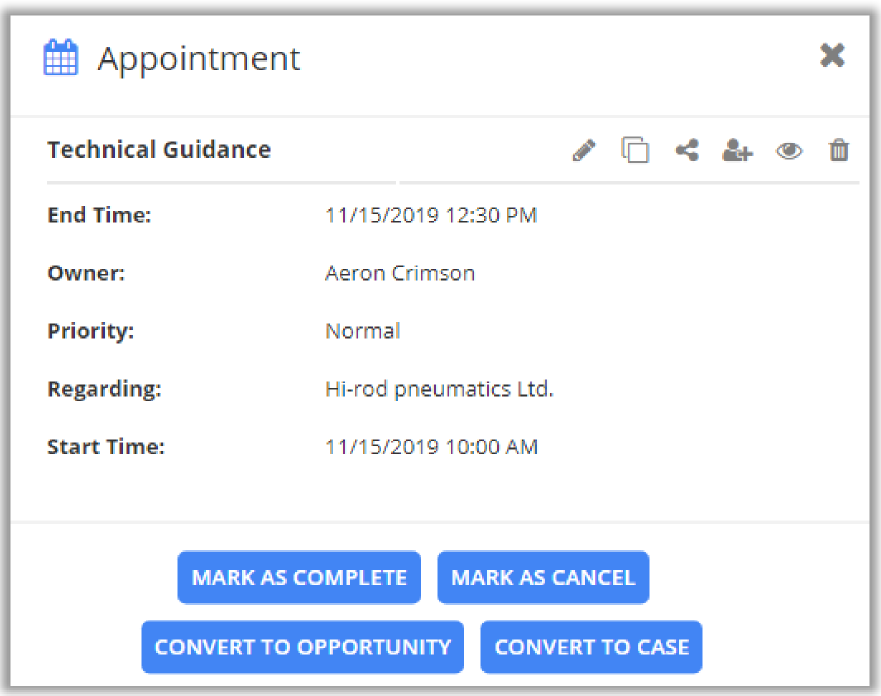
Setup for Detail Attribute & Attribute view:

- To setup the Detail view of activity, navigate to **Setup** and you will find the 'Detail Attribute' option in all the activity.



Activity Detail view on Calendar

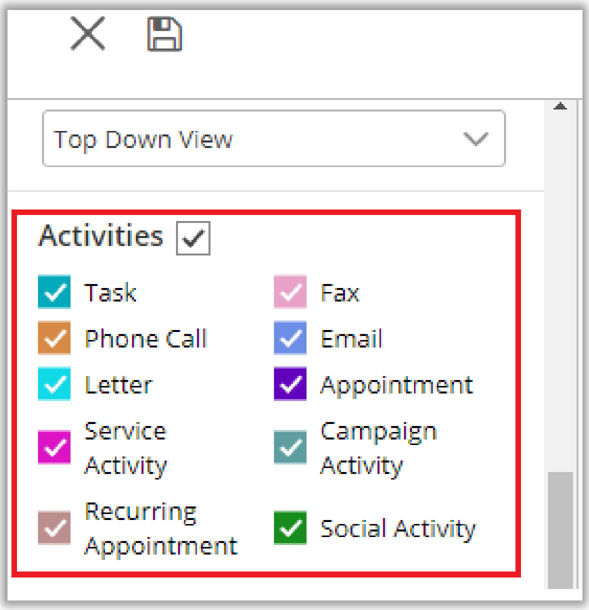
- To view the 'Activity Details', click on the activity, then the details can be seen in **detail**.



Left side panel options

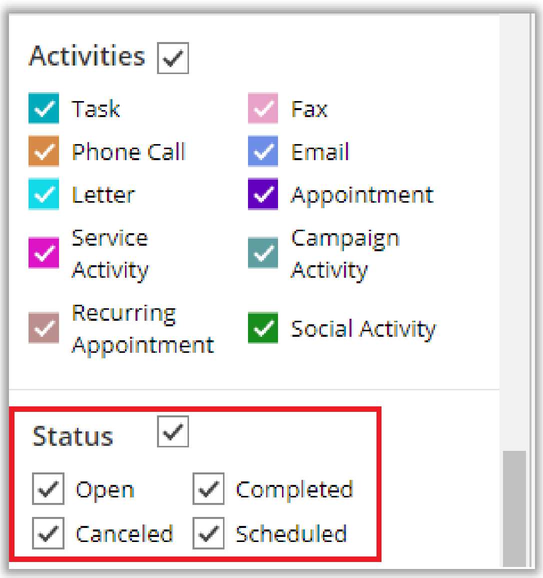
Activities

- To manage the activities which are to be displayed in the calendar, navigate to 'Activities' section on the left-hand side of the calendar.
- Thereafter, check the checkbox besides the activity to display the particular activity in the calendar. Here it will show only those activities that are enabled from the configurations page.



Status

- To view the activities as per their statuses, navigate to **'Status'** section and check the checkbox besides each option to display the activities with statuses in the calendar.



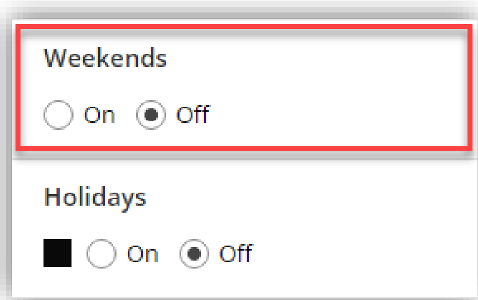
- <u>Note</u>: If you have selected the Overwrite Color **by Status** in activity configuration, the status of activity can be displayed in that color which is selected in 'Overwrite Color' option.

Priority

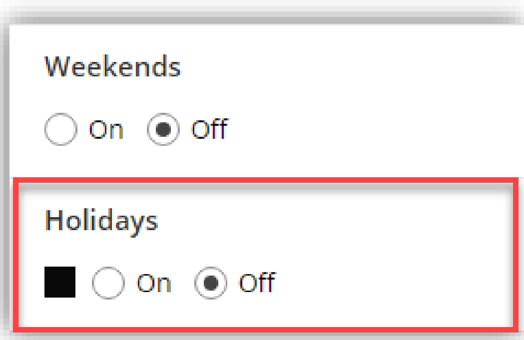
- Now to view the activities as per the priorities, navigate to **'Priority'** section and check the checkbox besides the priority.
- This would overwrite the actual color of the activity and display the activity in the color as per the priority of the activity.

Weekends & Holidays

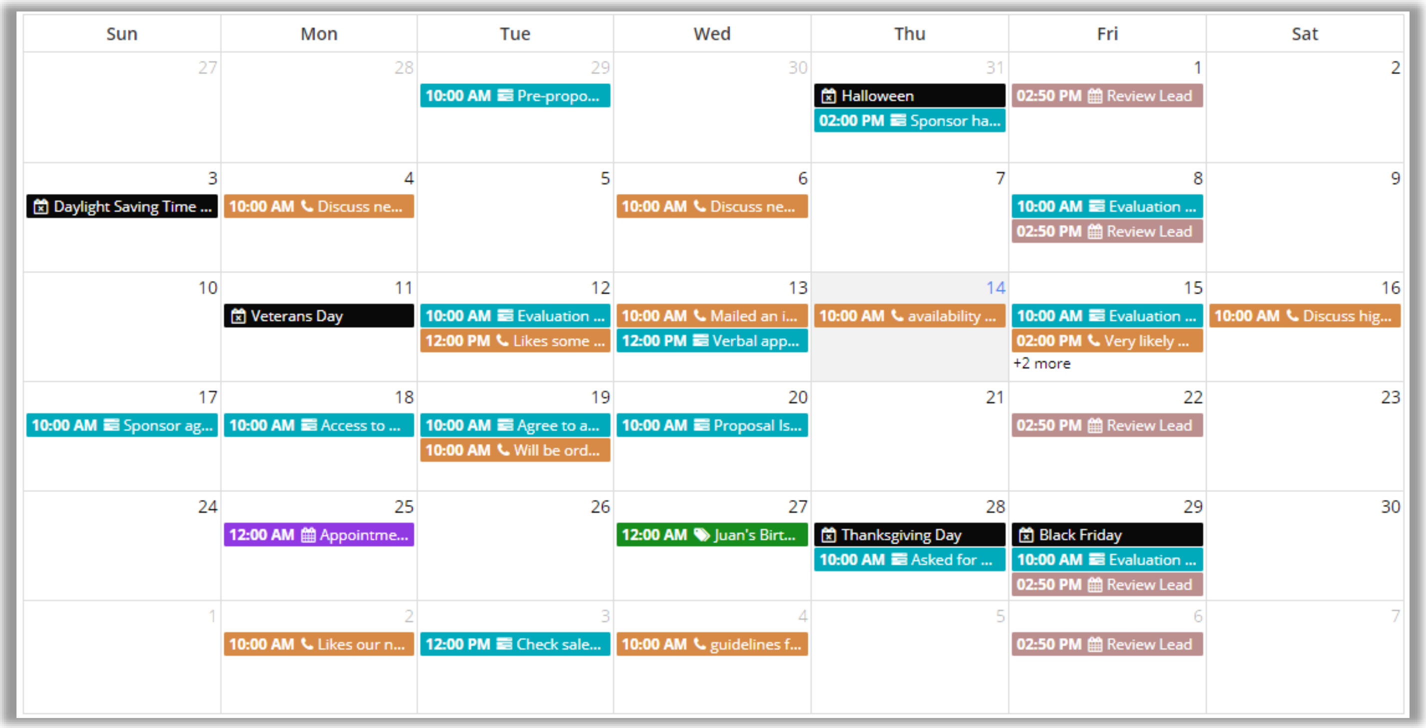
- To enable / disable weekends in the calendar navigate to the **'Weekends'** section.
  - To enable weekends select **'On'** button.
  - To disable weekends, select **'Off'** button. The columns of 'Saturday' and 'Sunday' will disappear.



- To enable holidays in the calendar, navigate to the **'Holidays'** section and check the checkbox.



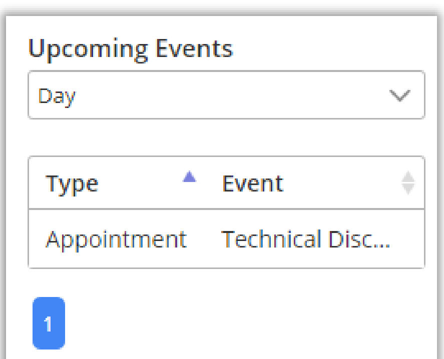
- By checking the checkbox besides **'Holidays'** section, you can view all the holidays in the calendar which is by default in black colored background.



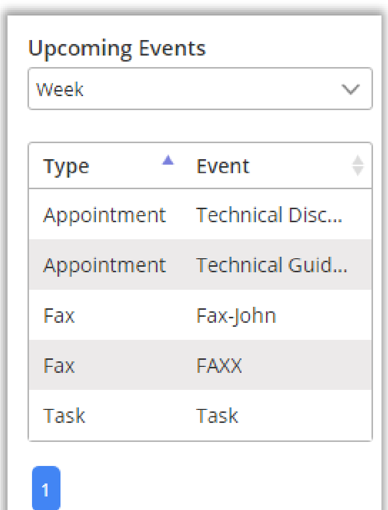
Note: Holidays will be displayed as per the country selected by the admin from the Default Configurations.

Upcoming Events

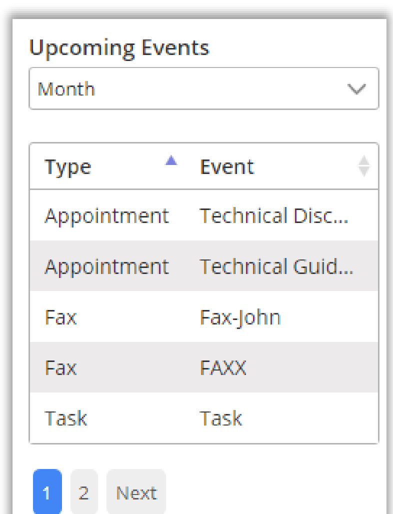
- To view a list of upcoming events, navigate to **'Upcoming Events'** section, from here you can select the type of view and view the upcoming events as per the 'Day', 'Week' or 'Month' format.
- Upcoming events will be displayed based on resource selected.
- Example: If account is the selected resource type, it displays upcoming activities related to the accounts selected.



Note: Today's Events



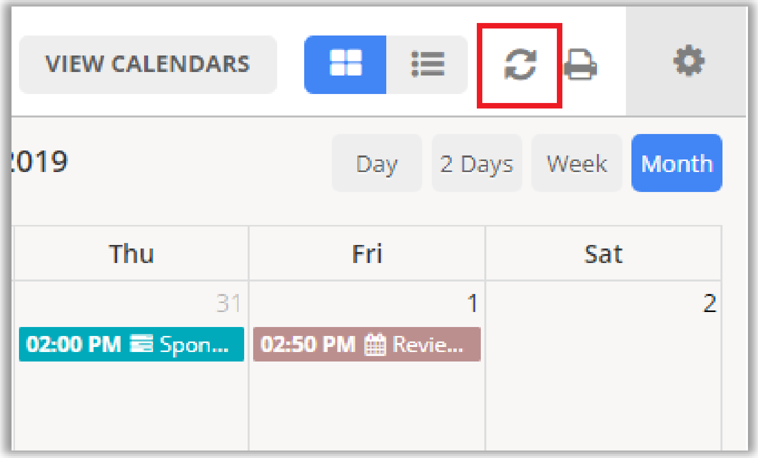
Note: 7 days from Today



Note: 30 days from Today

Refresh

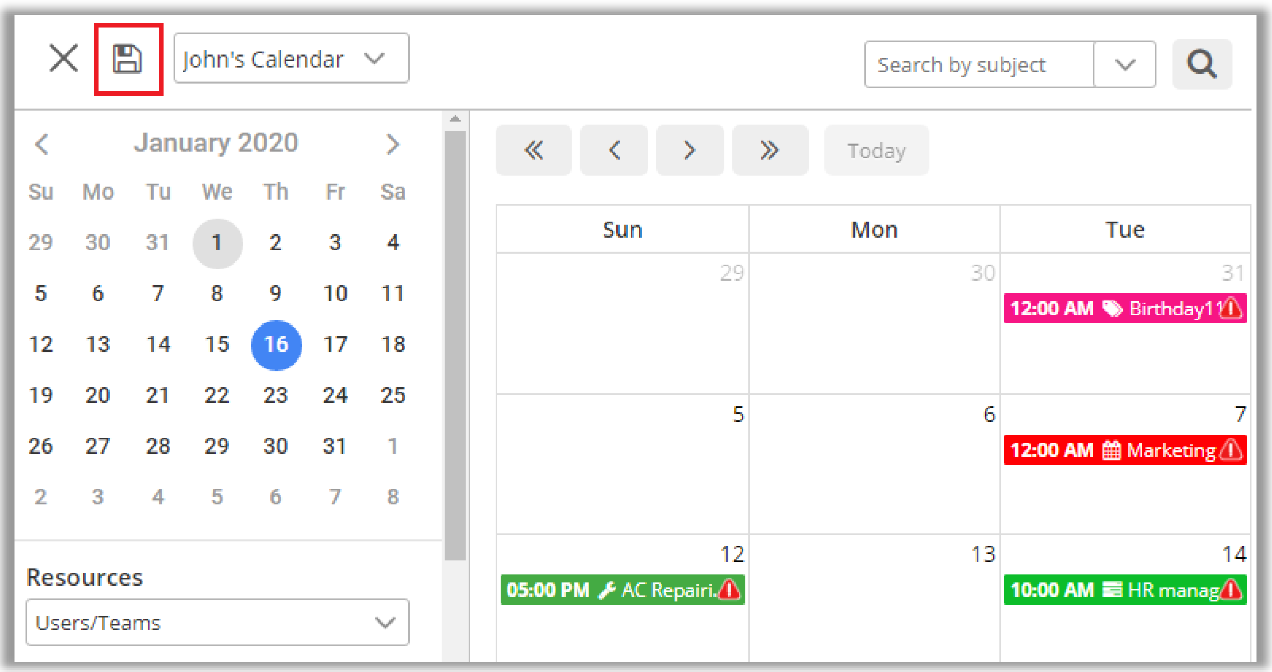
- To fetch all the events or activities from the CRM, click on the **'Refresh'** icon on the right-hand side of the calendar.



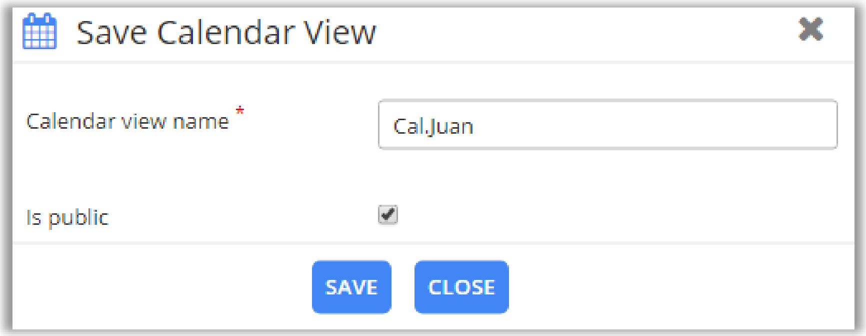
- Note: After changes in configuration, you must **Refresh** to view the applied changes.

Save and Share Calendar Views

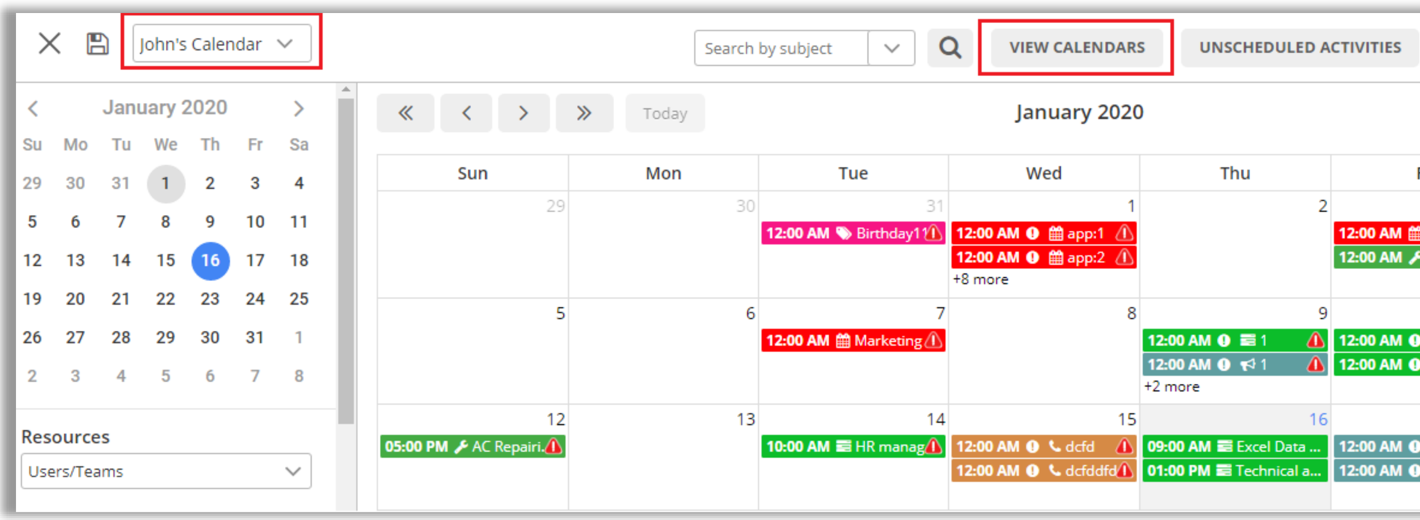
- You can also **Save** and **Share** any calendar view in Resource Calendar and Customer Calendar for future reference.
- Left panel Settings like selected resources, selected calendar view as well as, activities, selected status, priority, weekends and holidays get saved on saving view.
- You can save the calendar view on resource selection. If certain calendar settings are **saved** for **user** resource type, that calendar view will **not** be **available** to **accounts** or **contacts**.
- To save a view, click on **'Save'** icon available on the left side of the calendar.

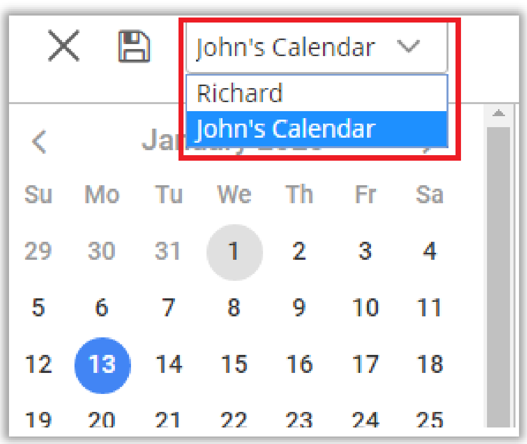


- After you click on 'Save' icon, a dialog box opens, where you need to define the calendar view. Along with naming, you can define if it's public or private.
- By default, '**Is Public'** check box is checked. If calendar is public, it is visible to all CRM users with AppJetty Calendar role under shared calendars section.



- Click on 'Save' button to save the calendar view.
- On the header, the 'Calendar View name' will be appeared in left side.

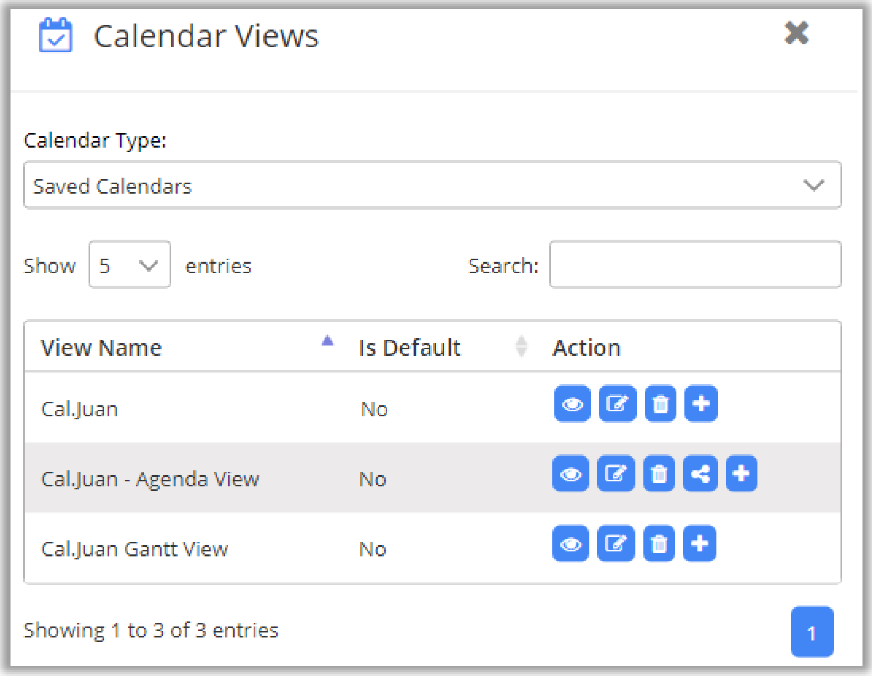




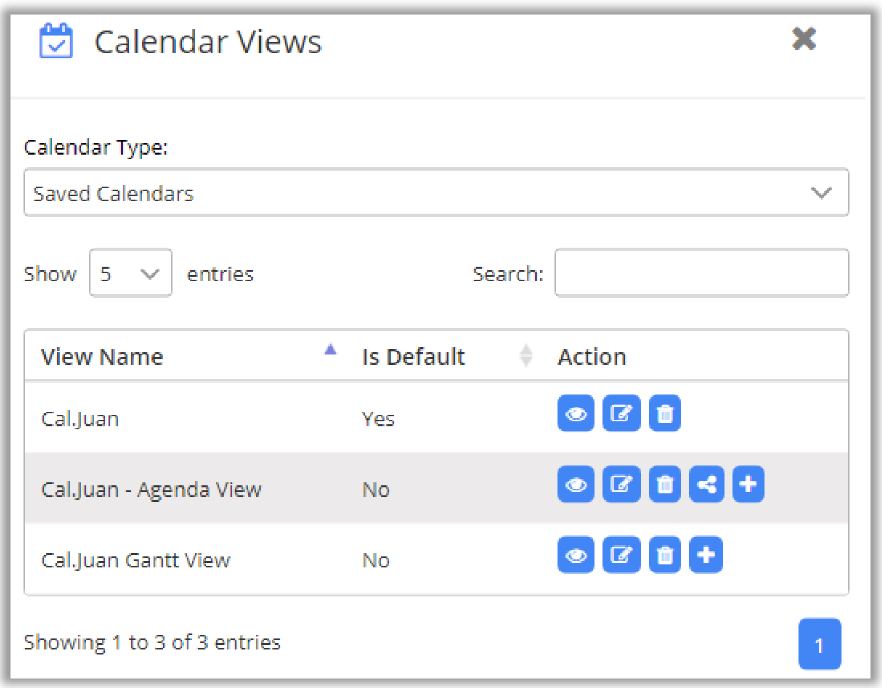
- You can see the list of **Saved Calendars** from the drop-down list of Calendar name.
- By click on any saved Calendar name, you can check that Calendar view.

- Users can access saved calendar views by clicking on **View Calendars** button on the calendar page.

- After you click on ‘View Calendars’, a dialog box opens up with dropdown to select calendar type.
- Calendar type is the ‘Saved Calendars’ and ‘Shared Calendars’.
- ‘Saved calendars’ are the one which you have created and saved while ‘shared calendars’ are the one that are shared with you by other users or the calendars that are made public by other users.
- Based on calendar type selection, you get list of calendars.

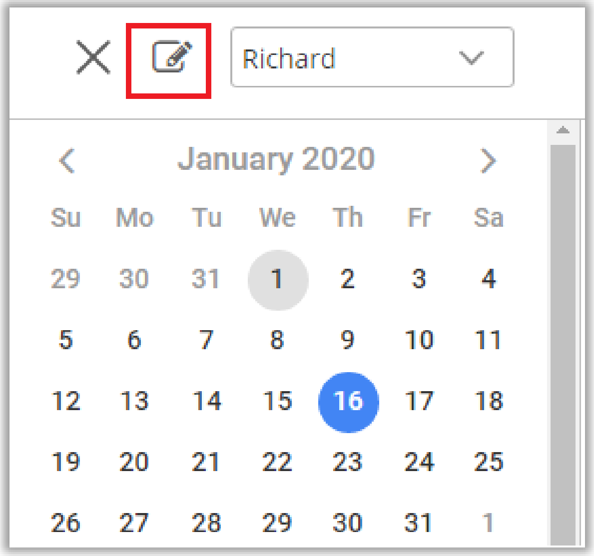


- From the Saved Calendars list, you can see the View name with their actions. You can select a default calendar by pressing **+** icon.

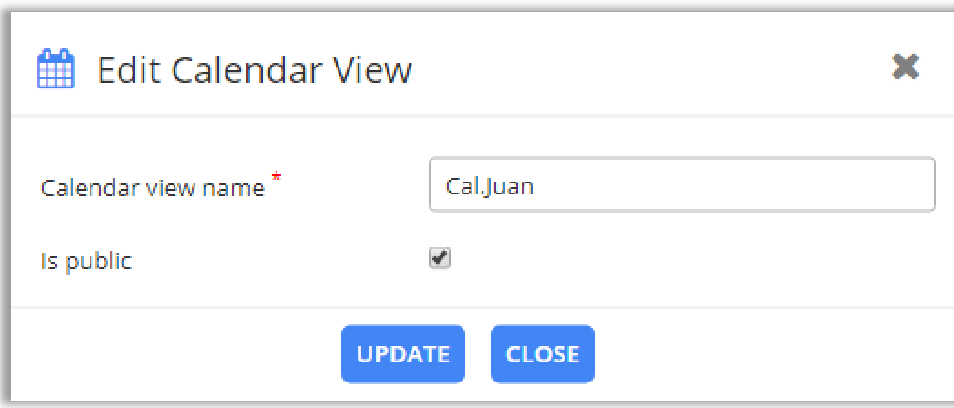


- For saved calendar and being the owner of that calendar, you can View, Edit, Delete and Share calendar. ‘Share’ option is available only when calendar is private (should not select as ‘Is Public’).
- Also, different actions are available only when you are the owner of the calendar, else it just shows the preview icon.
- Clicking on edit calendar, particular saved calendar opens so as to edit it as required and along with that shows update calendar view icon to update calendar.

Update Calendar



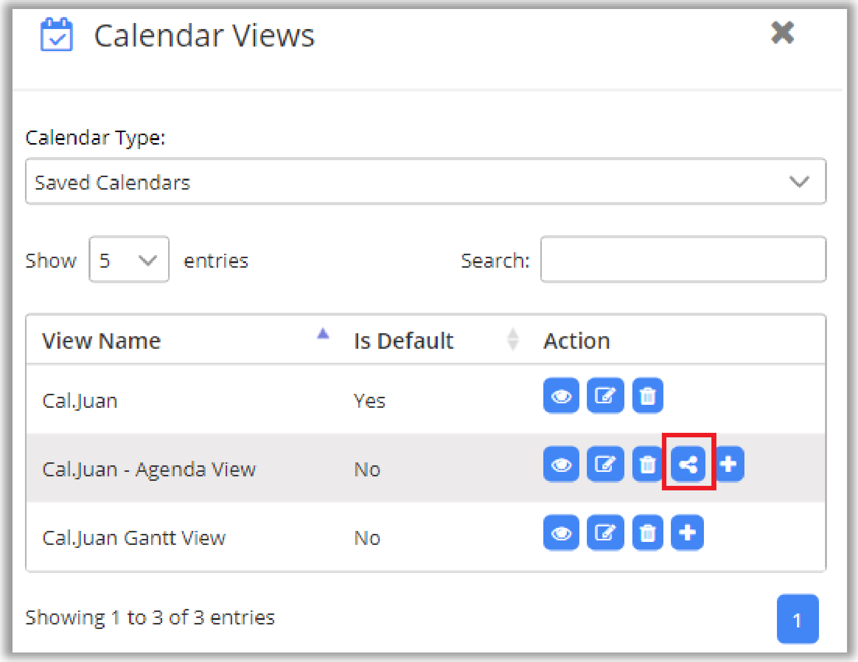
- On clicking ‘edit’ icon, you get to update calendar name and select if calendar is public or private.



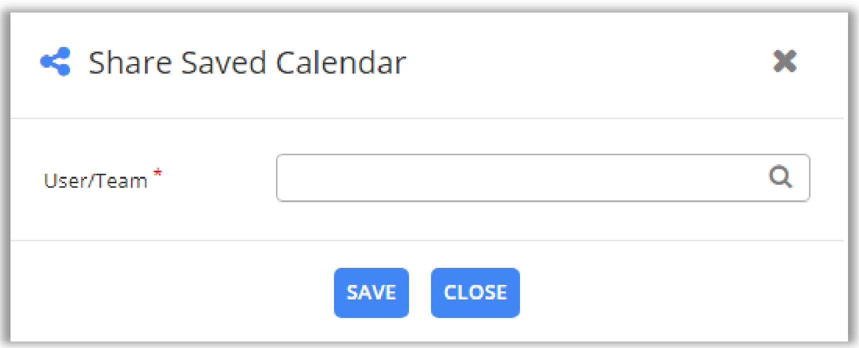
- Click on **Update** button to update the changes made in calendar.

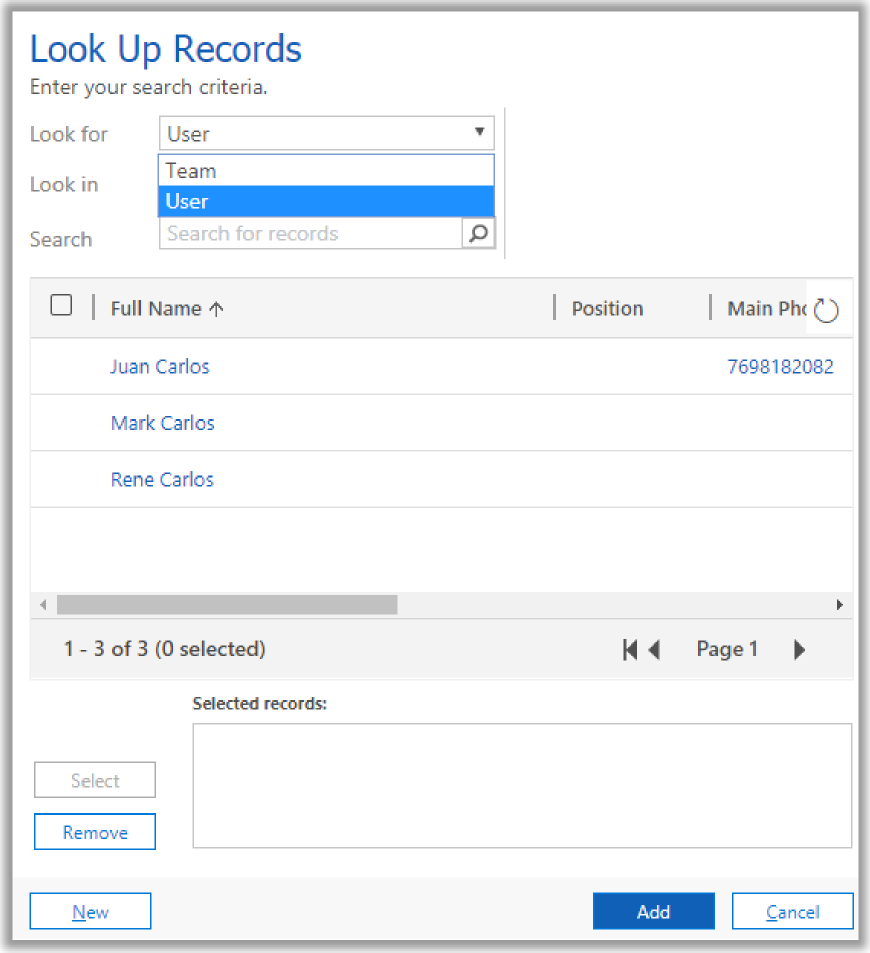
Share Saved Calendar Views

- Clicking on shared icon, you can share Calendar with other CRM users or team.

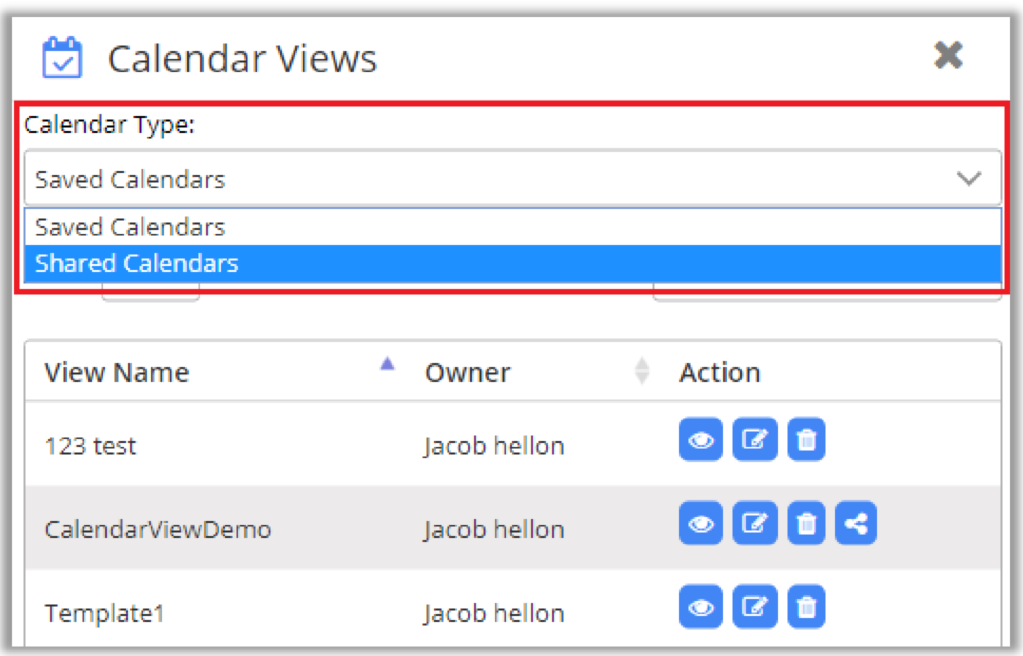


- Clicking on 'Share' icon, opens dialog box to select user or team from the look up records box. After selecting user, click on Save button to complete the calendar sharing. You can select multiple users and teams to share calendar with.

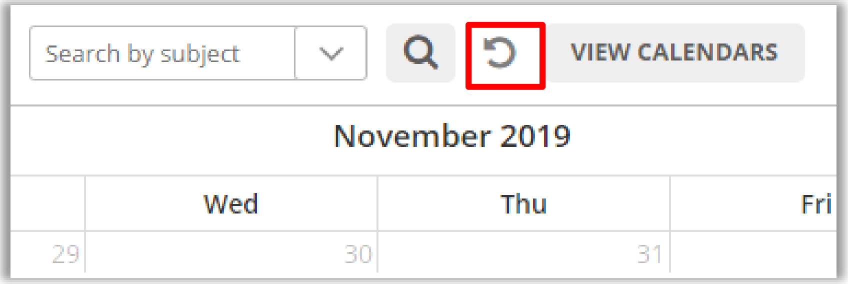




- You can select the Users/team with whom you want to share the Saved Calendar view.
- A Calendar view shared by others can be seen by selecting 'Shared Calendars' option.

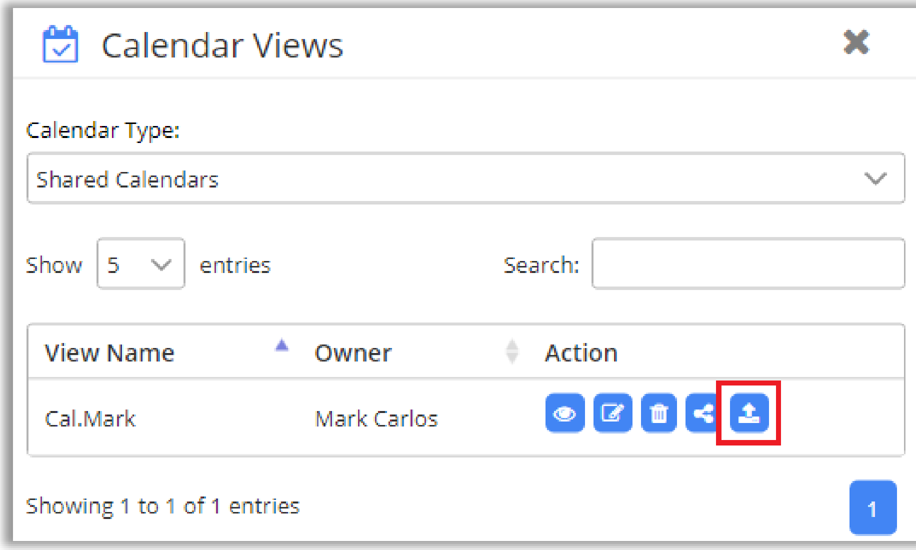


- When saved calendar is previewed, it enables a button to go back to the current view (previous view).

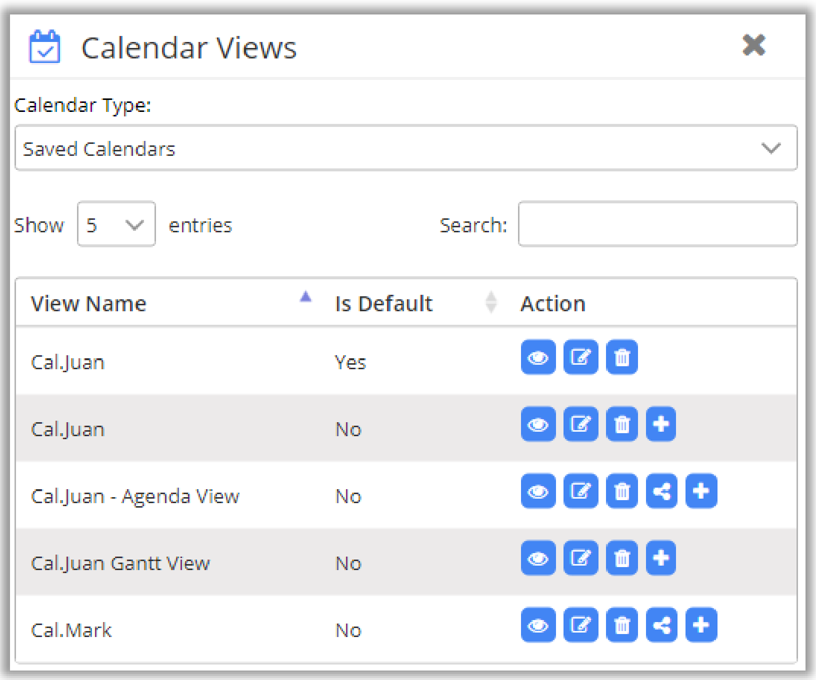


Move Shared Calendar to Saved Calendar

- You can move the 'shared calendar' to the 'Saved Calendars' list by clicking on 'Move' icon.

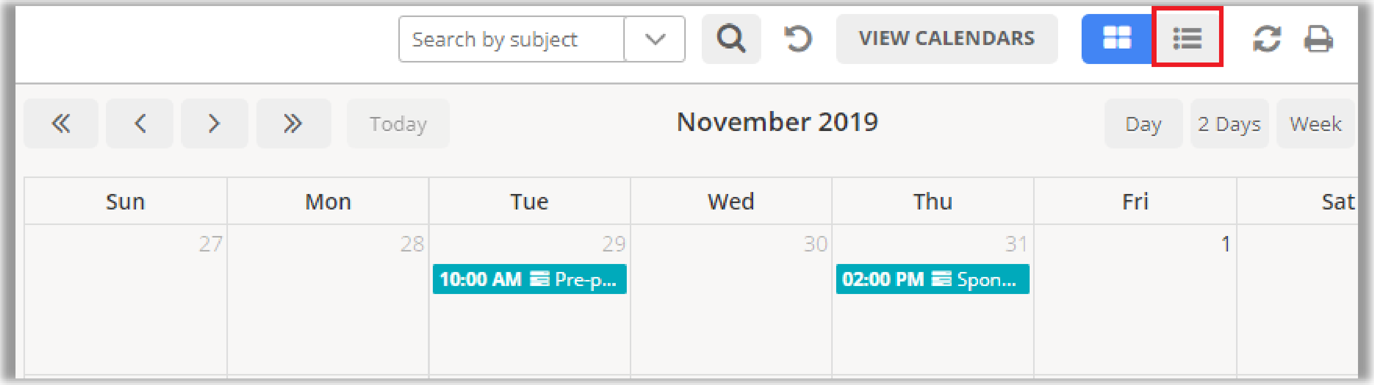


- Now you can see a shared calendar in Saved Calendars list. You can make it default if you want.

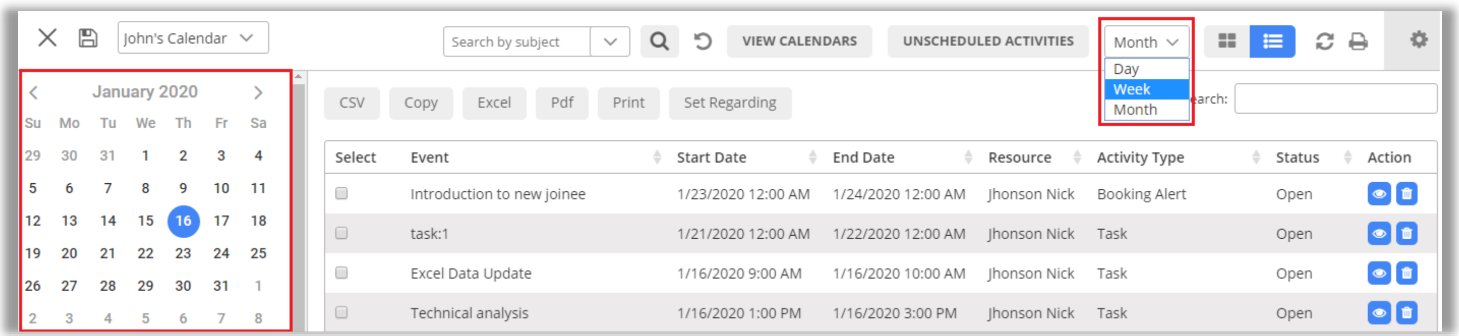


Activity Grid View of Calendar

- To get list view of all activities, navigate to 'list' button on the calendar and along with that select time span from Day, Month or Year from the dropdown.



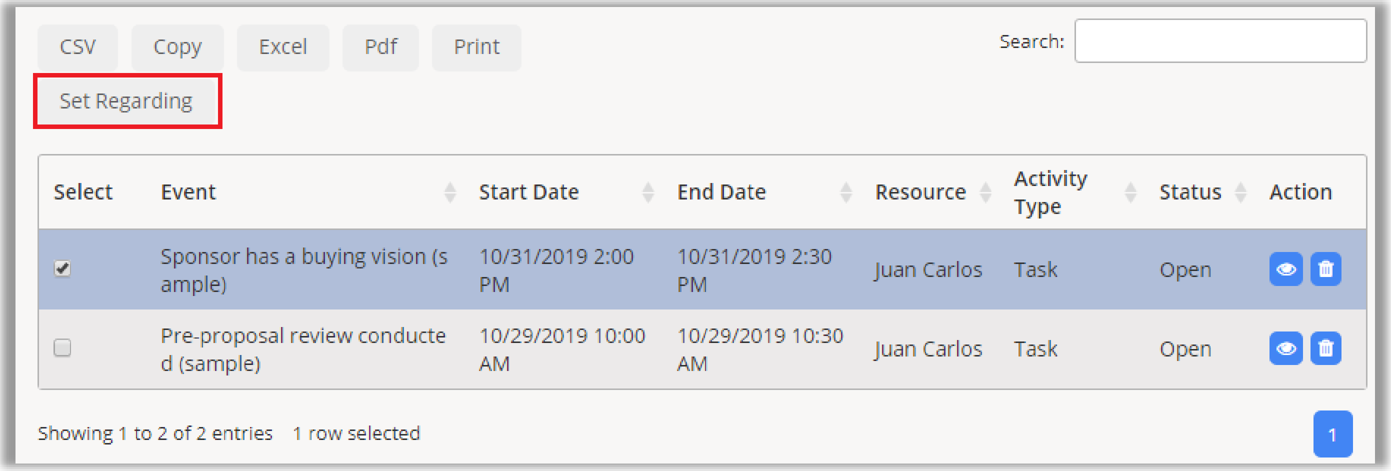
- By clicking on 'List' icon, the list of events will be displayed Day wise by default. You can change to Week or Month.



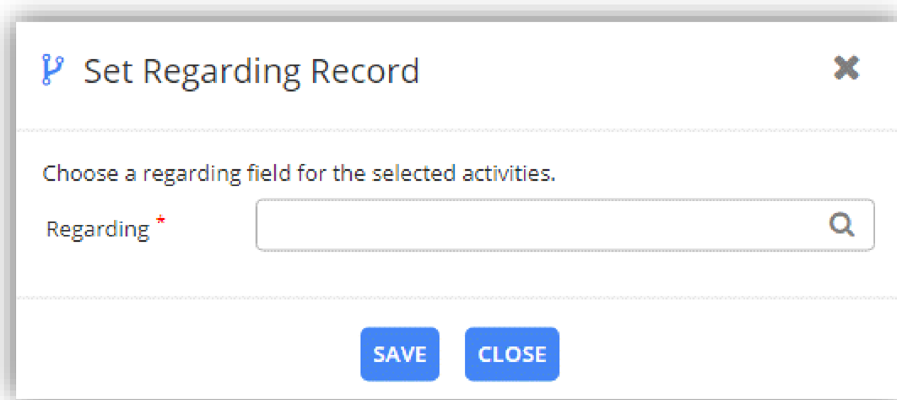
- List view works based on **small calendar** available on left side of the calendar view. You will get the list of events based on day/date selected in the smaller left side calendar.
- For **Day** span, it shows list of events that fall under the days that are selected.
- For **Week** time span, it shows list of events that fall under the week in which the selected day is part of.
- For **Month** time span, it displays events of months to which the selected day is part of.
- From list view, you can perform multiple actions like:
    - Exporting records to CSV, Excel, PDF
    - Copying records,
    - Printing records and Set Regarding for the selected records.

Set Regarding under Grid View

- To set regarding for the records, select the records and click on **Set Regarding** button.



- This opens set regarding record dialog box to select record from the look up dialog box.



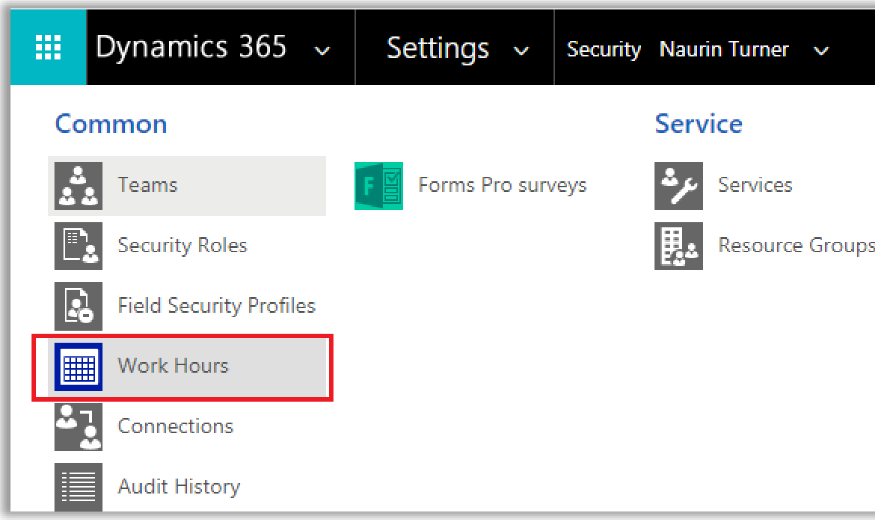
- After selecting click on 'Save' button to set regarding for the record. As you click on Save button, the popup message will be appeared to set regarding,

Resource Scheduler (Manage Working Hours)

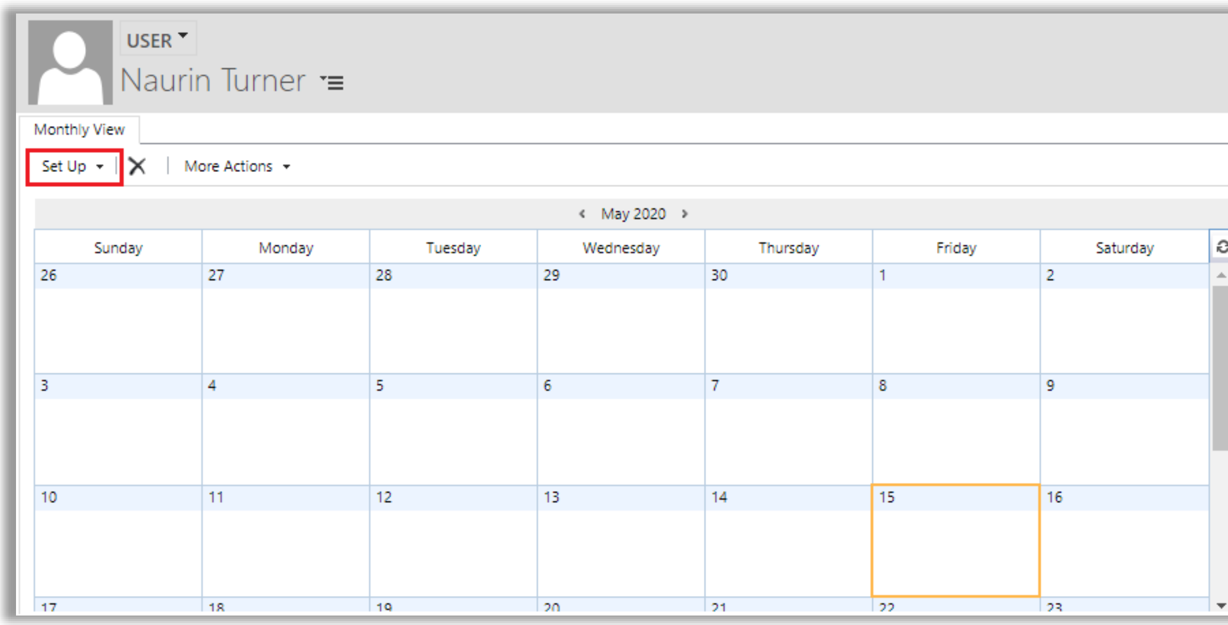
- In the Calendar365, you can enable the "Resource Scheduler" from the settings and you can schedule the activity based on the added working hours.
- If the "Default (User Working Hours)" option is selected, User only can view the working hours on the AppJetty Calendar view based on the default CRM user option.
- But if the "AppJetty Scheduler" option is selected, User can add the working hours from AppJetty Calendar and schedule the activity based on the Working Hours. You can also manage the working hours, break timings and the leave in Calendar365.

Set the Working hours for default CRM users:

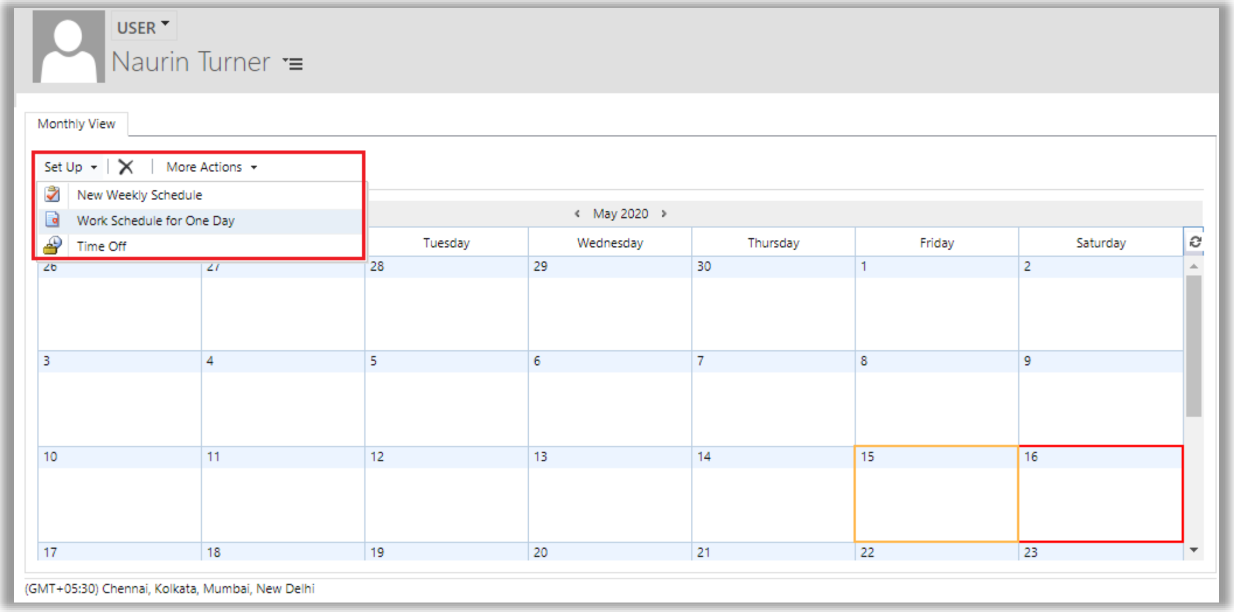
- To set and edit the working hours in CRM, navigate to **Advanced Settings** ⚙ → **Security** → **Users** → **Select user** for which you want to set working hours.
- Besides the Username click on the down arrow ∨ and select Working hours.



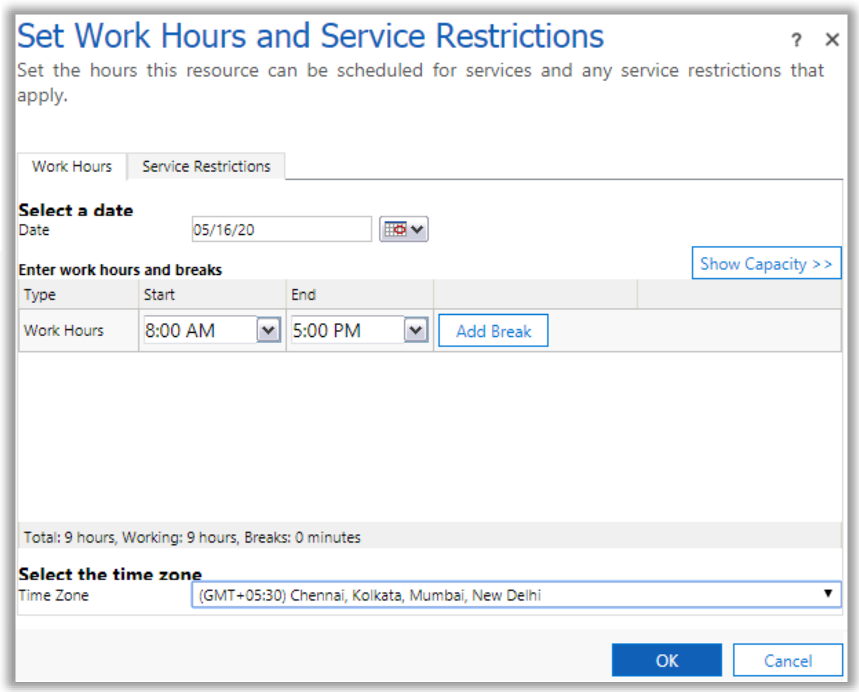
- By clicking on Work Hours, the default calendar of CRM will display with the records of the selected user if already inserted.



- Now, by clicking on Set Up option, you can schedule the work on weekly basis or for one day by selecting the date.



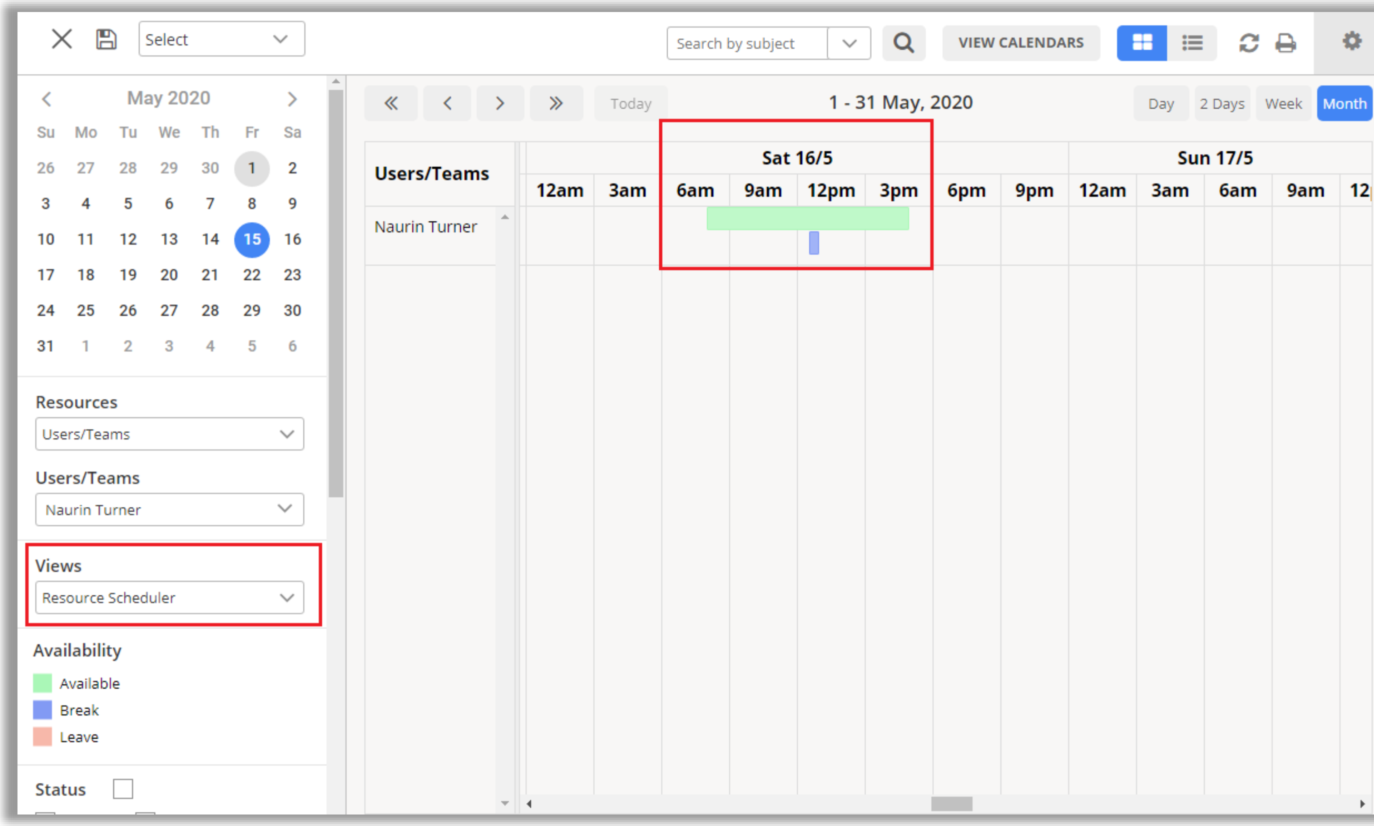
- You can select the Start & End Time including Break.
- Later, you can also edit and delete the scheduled work hours.



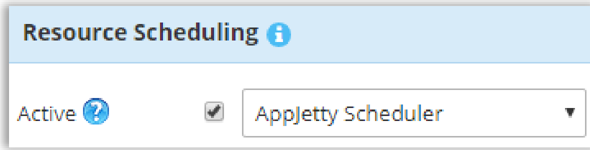
- Similarly, you can schedule the work for weekly basis by selecting the working days.

- If you have selected the **Default (User working hours)** in "Resource Scheduling" option, you will get the working hours on the AppJetty Calendar which is set in CRM default calendar.

Note: You can only view the Working hours which is set in CRM default calendar of the user.

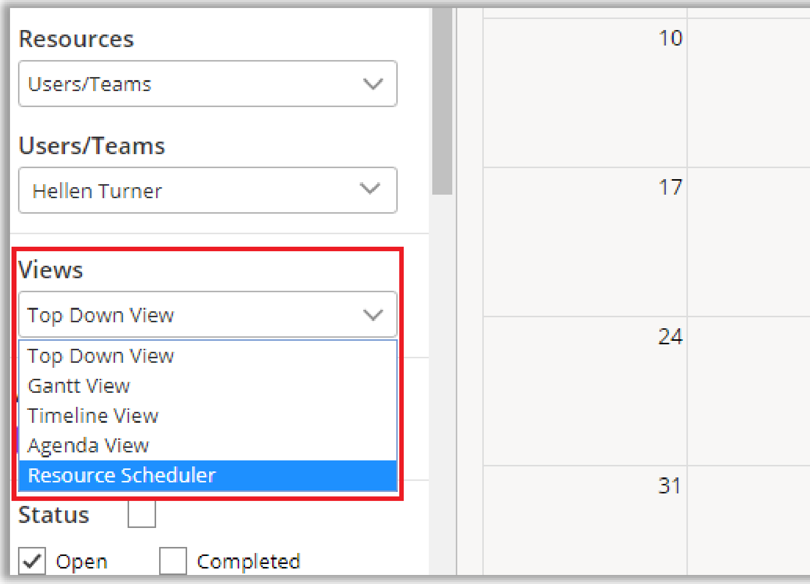


Add the Working hours in AppJetty Calendar:

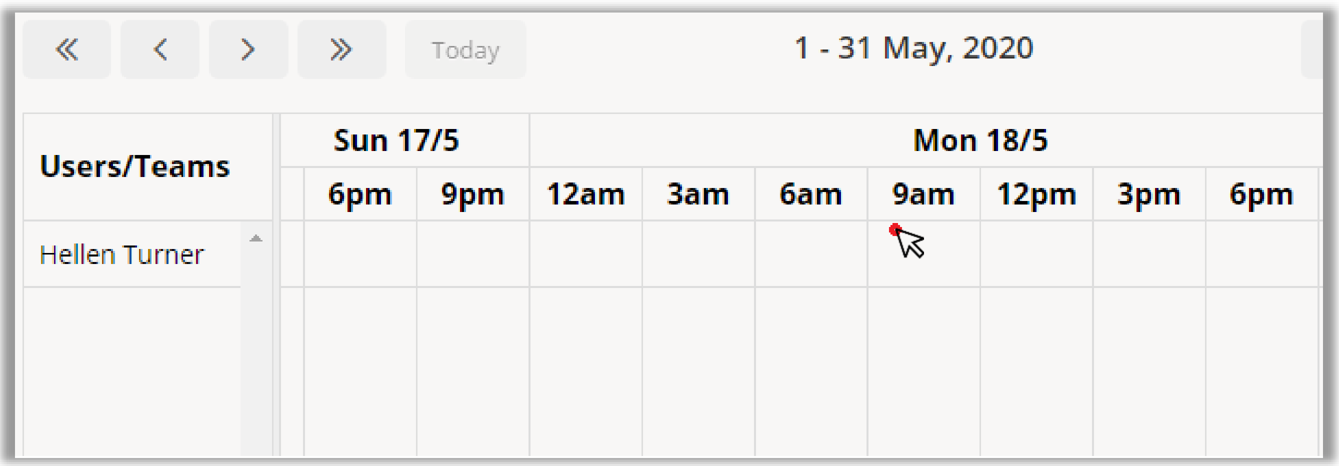


- If you have selected the **AppJetty Calendar** in "Resource Scheduling" option, you can add the working hours on the AppJetty Calendar.

- First, you need to select the **Resource Scheduler** in the "Views" option from the right panel.

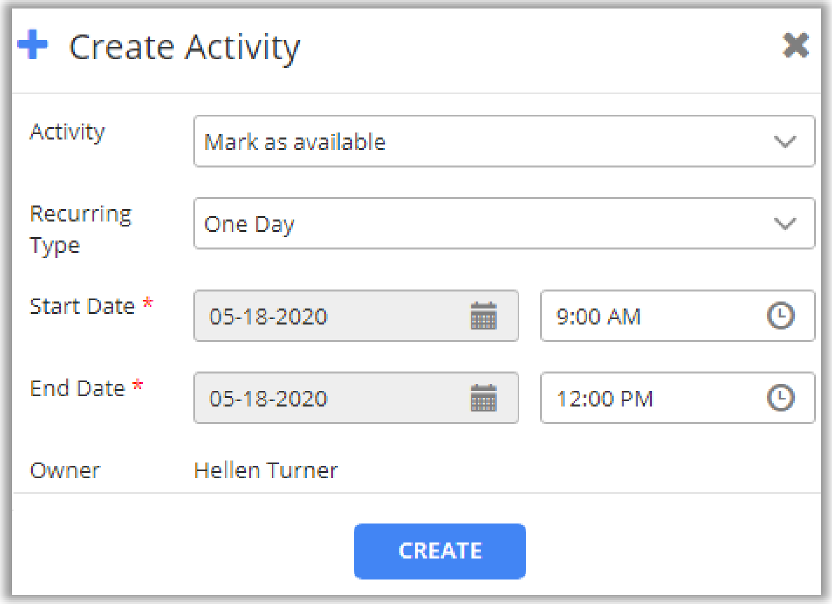


- By selecting the Resource Scheduler, the Calendar with work scheduled records will display if already inserted.

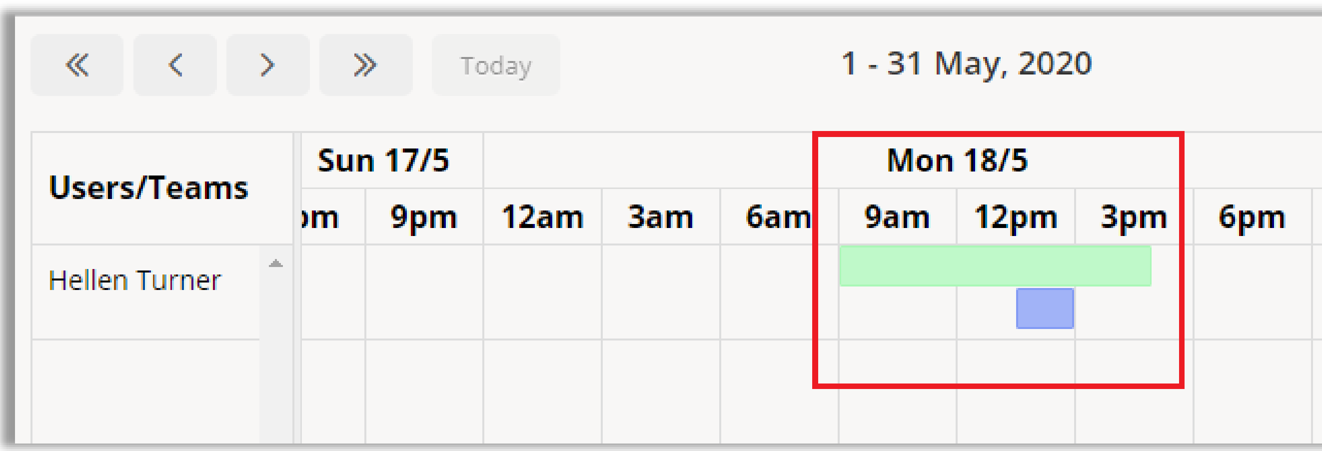


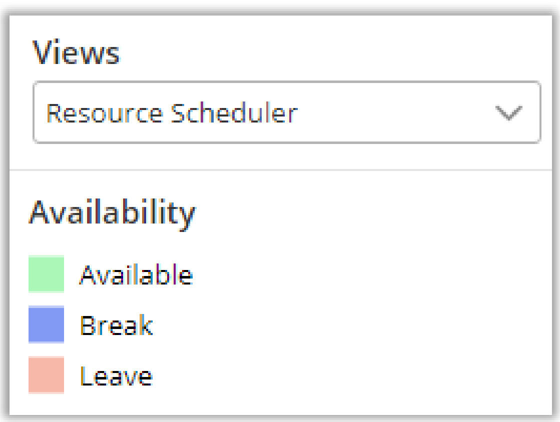
- By clicking on the date & time for scheduling work, the Create Activity popup will appear to select the details related to schedule.

- From here you can select the Activity:
  Marks as Available: Time slot for working hours.
  Mark as Break: Time slot for break timings.
  Mark as Leave: To create a leave.
- Select Recurring Type for scheduling work for **One Day** or **Weekly/Monthly** basis (recurring).
- Select the Starting & Ending Date & Time. Click on **Create** button to add the work schedule.



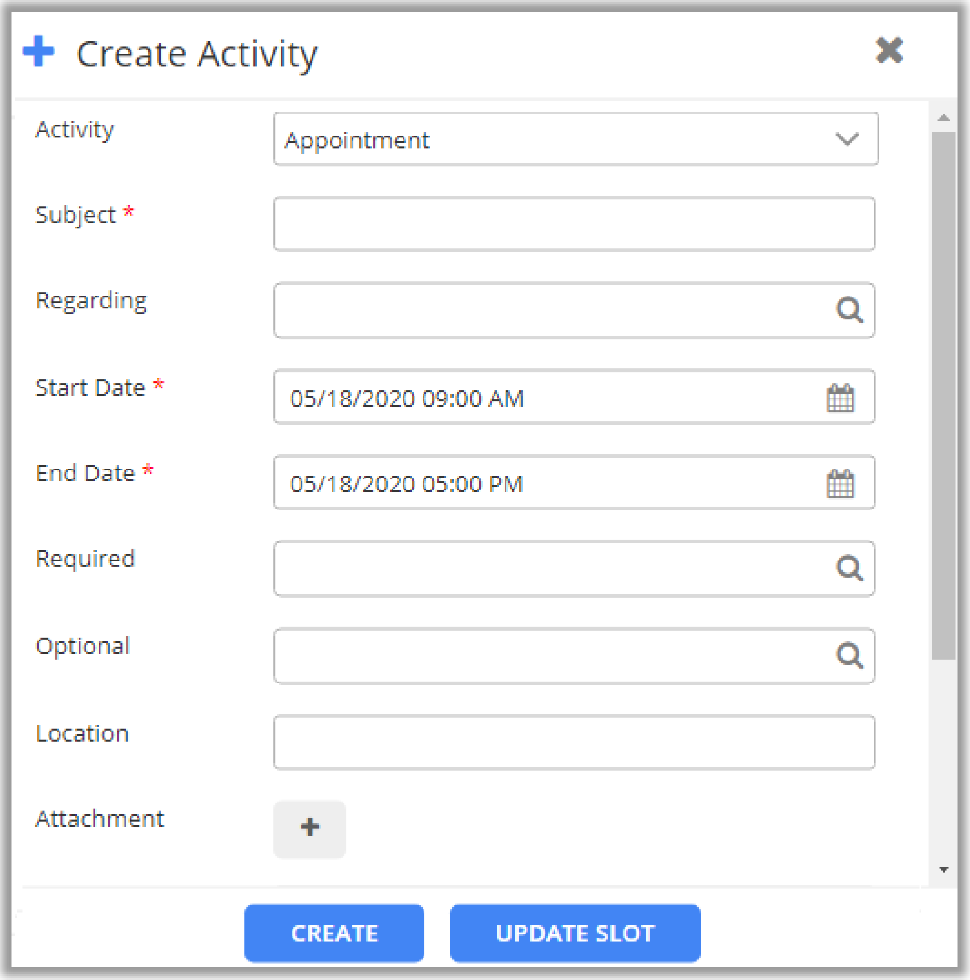
- Now, you can see the inserted Work Schedule for selected resource.





- As you clicked on Resource Scheduler, the default color of Availability will show.
- You can differentiate the Working availability; Break timing & Leave by the colors.

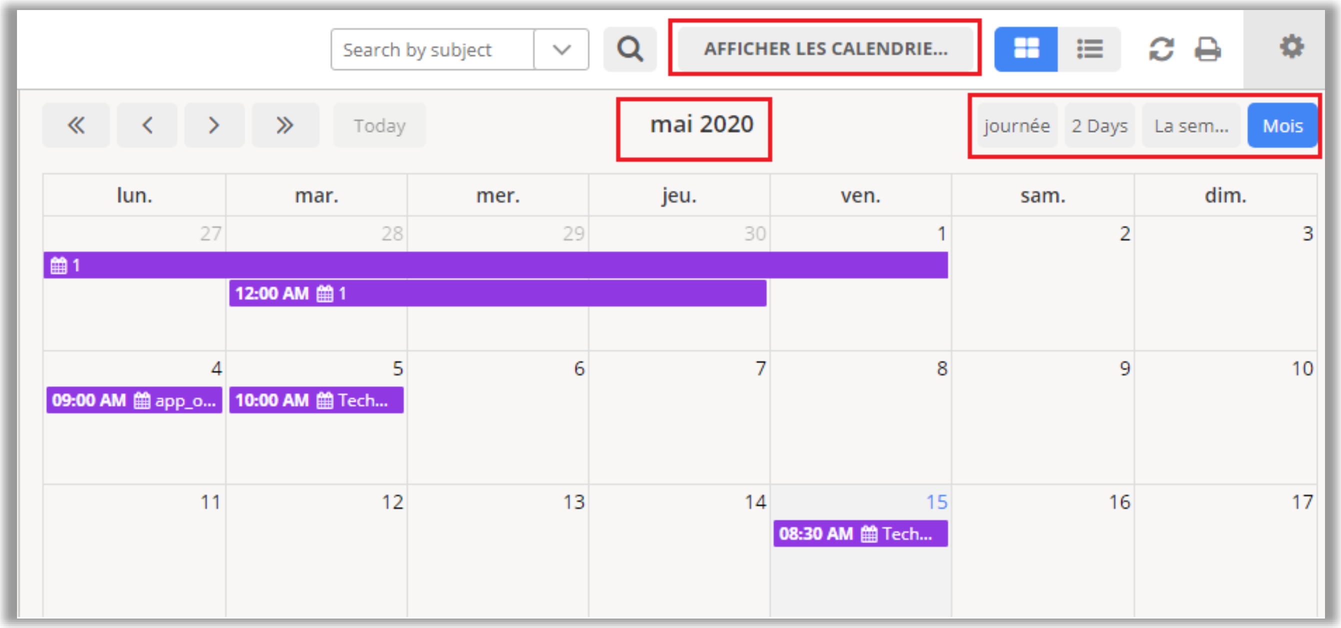
- Now by clicking on Working hours (Available), you can insert the activity for that work schedule slot.



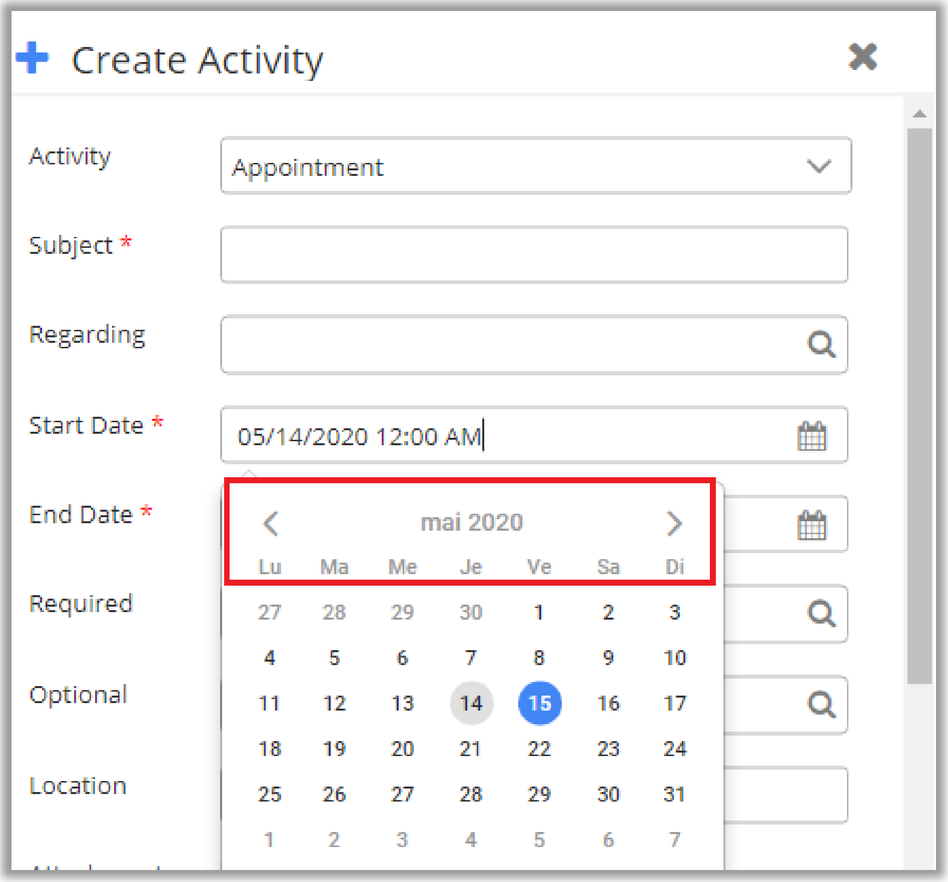
- From here, you can again edit the Slot by clicking on **Update Slot** button if require.
- In this way, you can schedule the work for the resources(users) based on their availability.

Multi-language Calendar Labels

- You can see the default CRM labels and Calendar365 captions in different languages based on the language settings in **Personalization Settings** from the CRM side and in the **Settings** from the Calendar365 side.

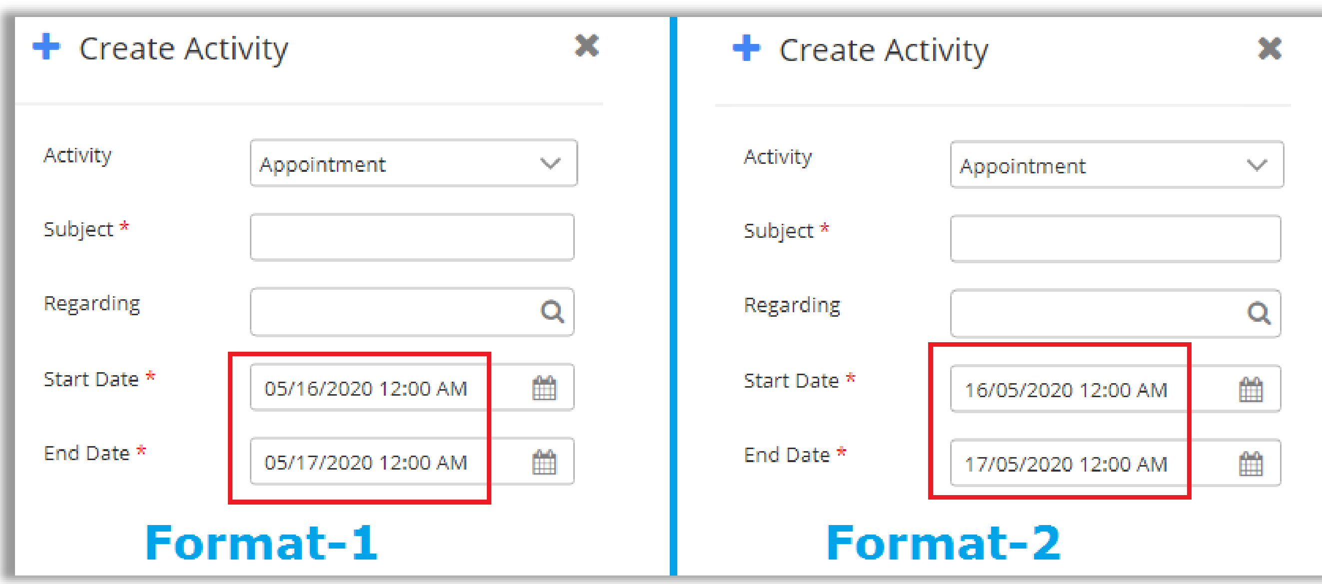


Note: To display the labels & caption in the same language, you must select the same language on the CRM side and Calendar365.



Dynamic Date formats

- You can manage the formats for **Date** from the Personalization Settings of the CRM.

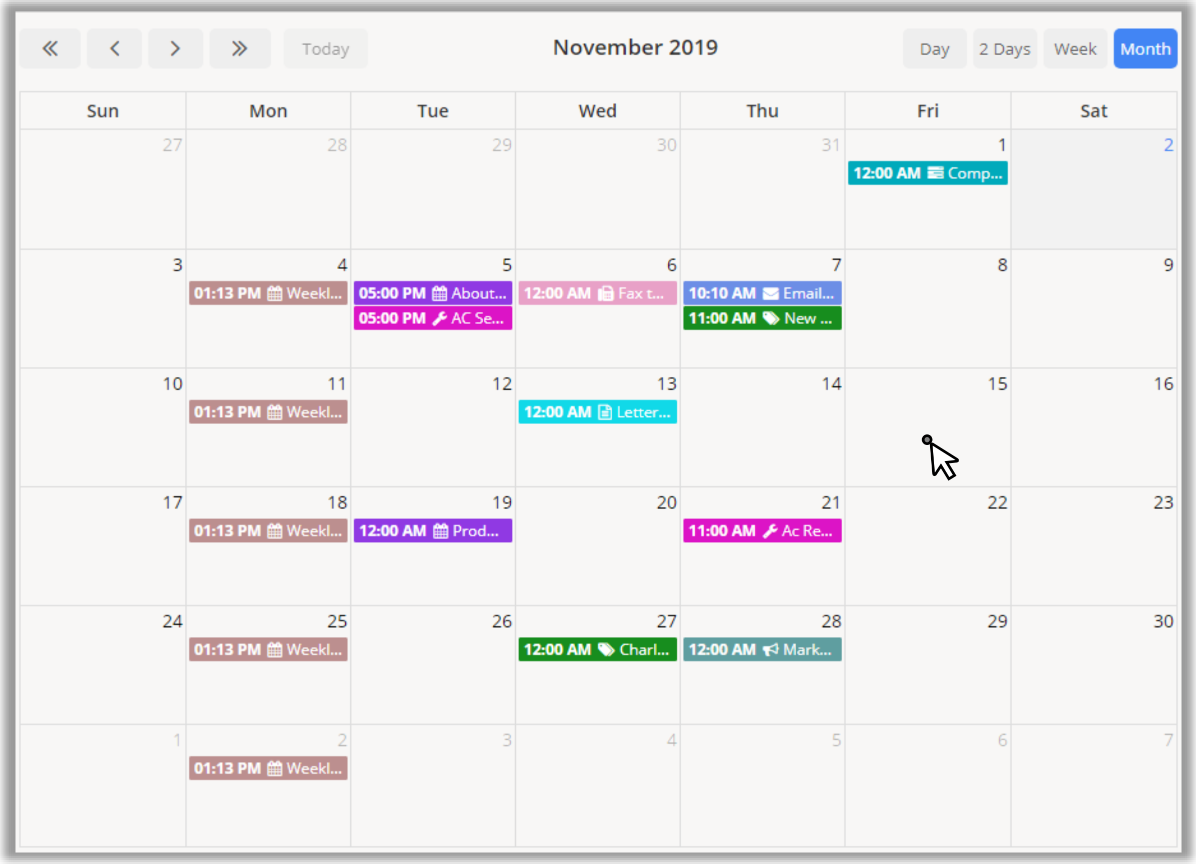


Calendar Activities

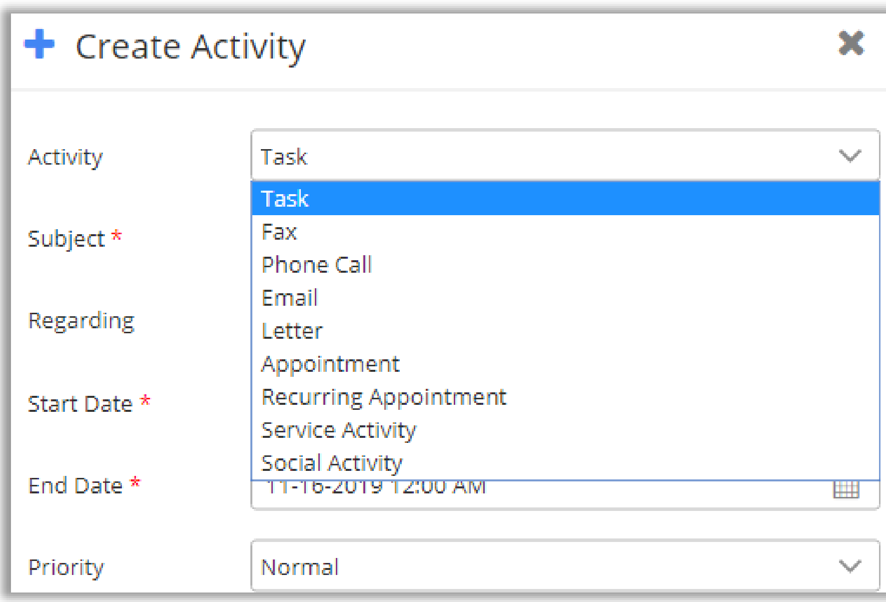
- Calendar Activities: You can Create, Edit, View, Copy & Share an activity.
    - Create an Activity
    - Create a Custom Activity
    - Location
    - Attachment for Activity
    - View Activity
        - View Note
        - Edit Activity
        - Copy Activity
        - Share Activity
        - Re-assigning Activity
        - View Activity
        - Delete Activity
    - Search Activity
    - Recurring Appointment
    - Share Activity
    - Overdue Activity
    - Conflict Management
    - Unscheduled Activity

Create an Activity:

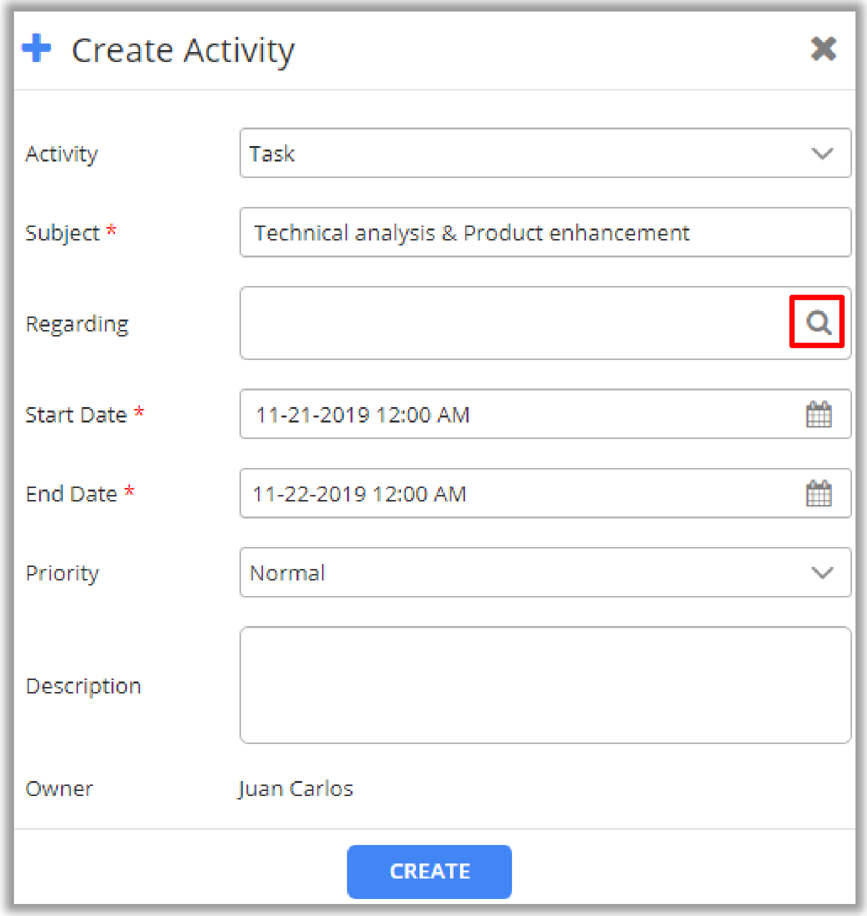
- To create activities, click on the date on the calendar that you want to add the Activity to.



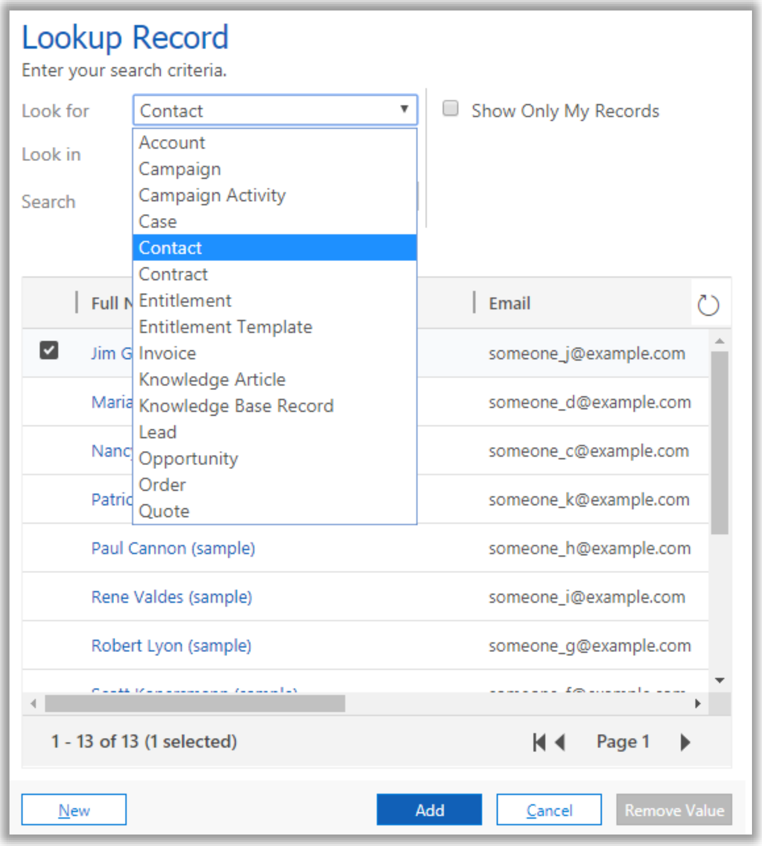
- As you click on the Date, **'Create Activity'** popup will be appeared on your screen:



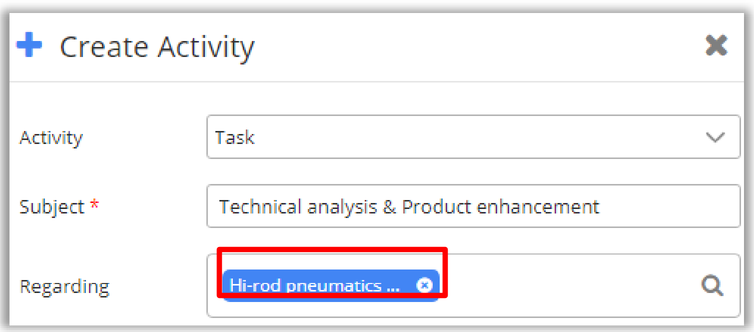
- **Activity:** Select the type of activity you want to create.
- **Subject:** Enter the subject of the activity.
- **Regarding:** Mention the Account, Contact, or any other record with which activity is concerned.



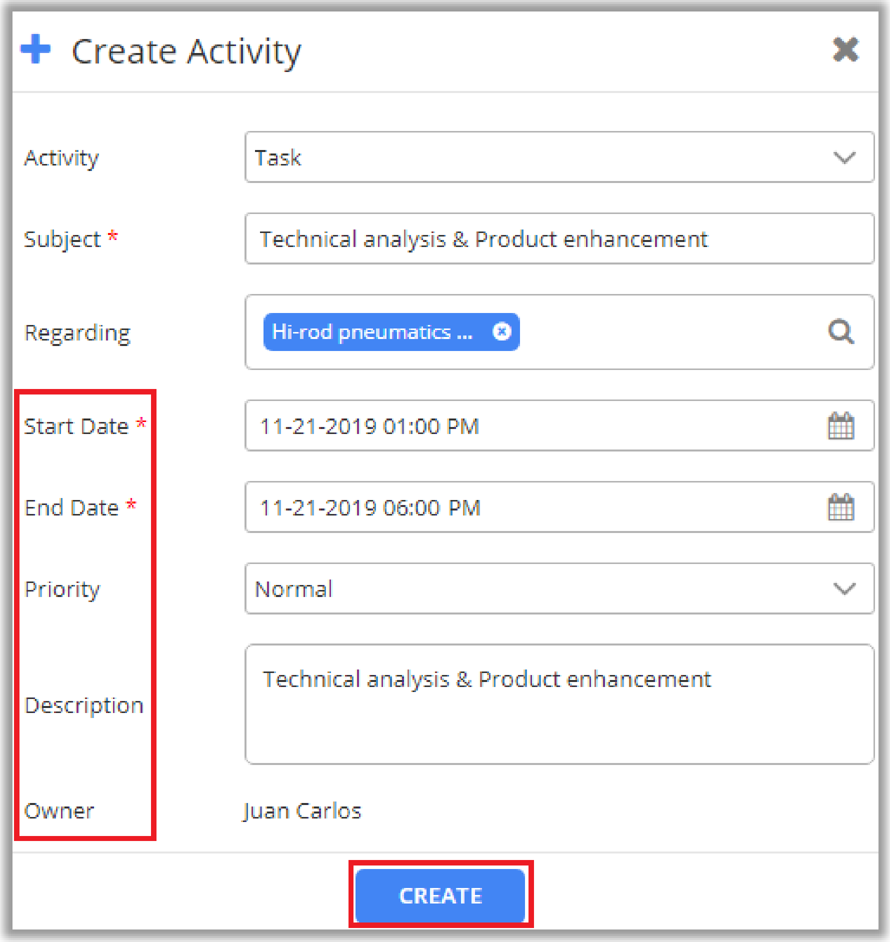
- Clicking on **Search** icon in the 'Regarding' text area, "Lookup Record" dialog opens from where user can select the record for activity.



- Select any Account, Contact or any other record which is required in Activity. After selecting from the list, click on **Add** button. The selected record will be displayed on 'Regarding' text filed.



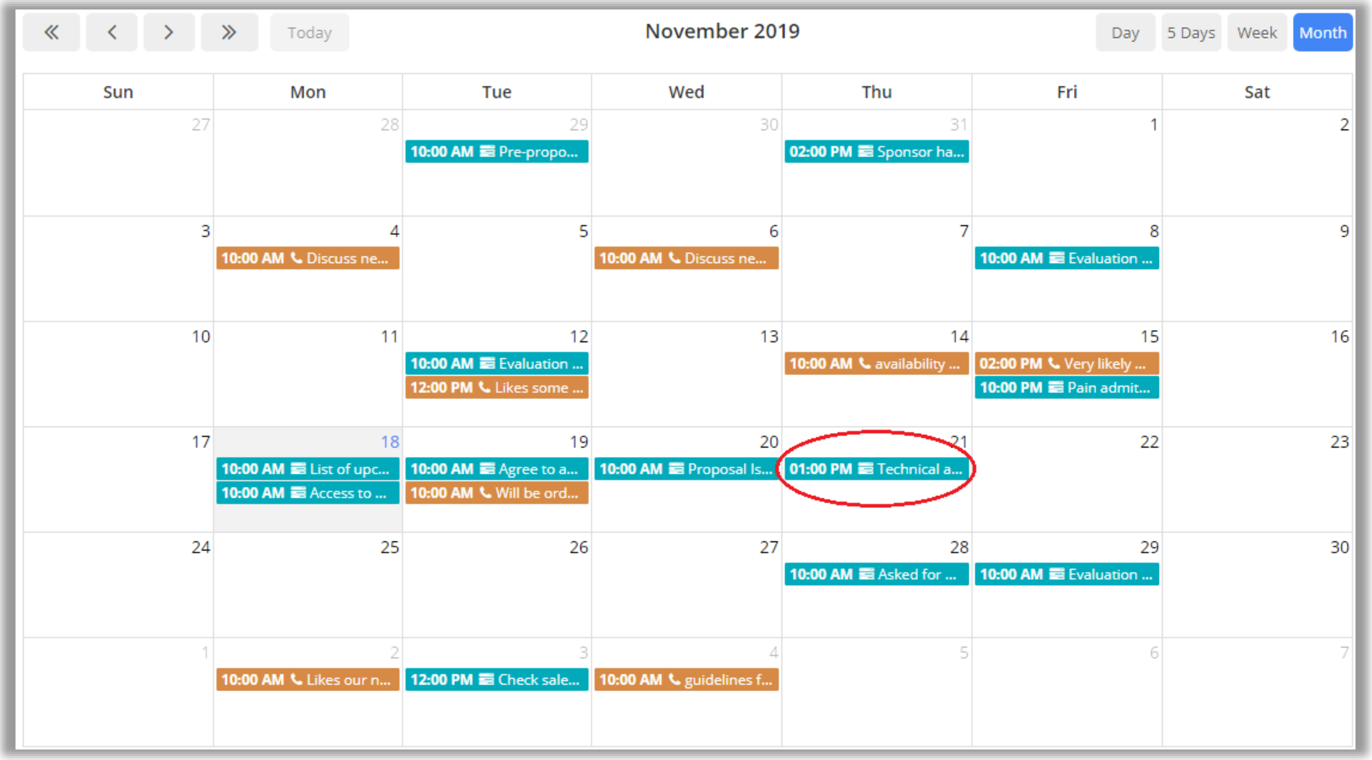
- Selected record can be seen in Regarding edit box.



- **Start Time:** Set the Start Date and Time of the activity.
- **End Time:** Set the End Date and Time of the activity.
- **Priority:** Set the priority of the activity. Priority can be High, Normal, or Low.
- **Description:** Enter the description of the activity.
- **Owner:** Displays name of the owner who created the activity.

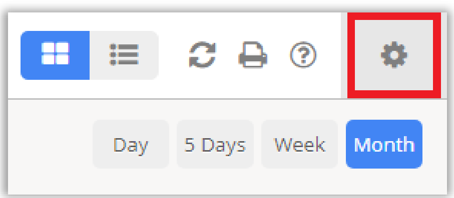
- After pressing **Create** button, if there is no error, a confirmation message will be highlighted on your screen.

- Now you can view the added activity in your calendar.

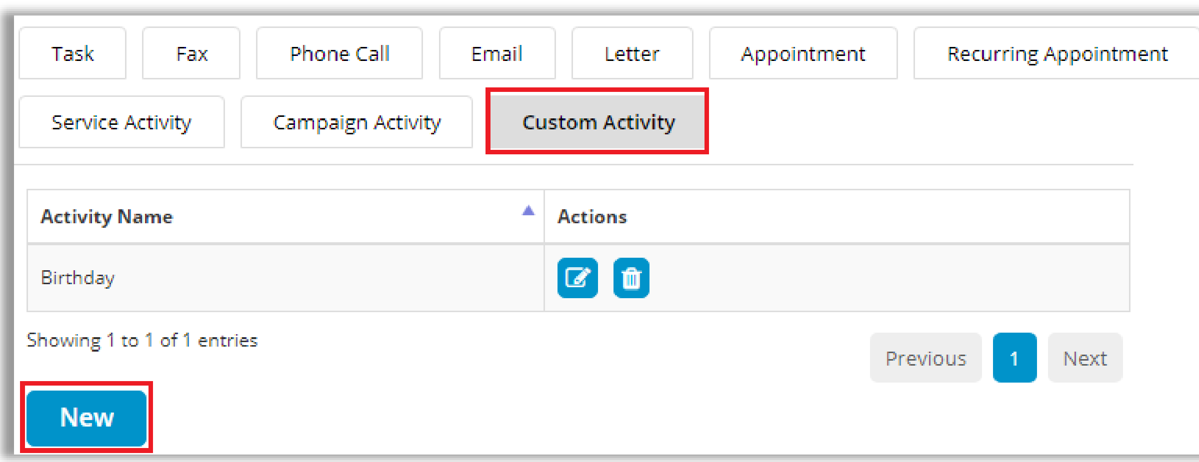


Create a Custom Activity

- To create a Custom Activity, click on **'Configuration'** icon.

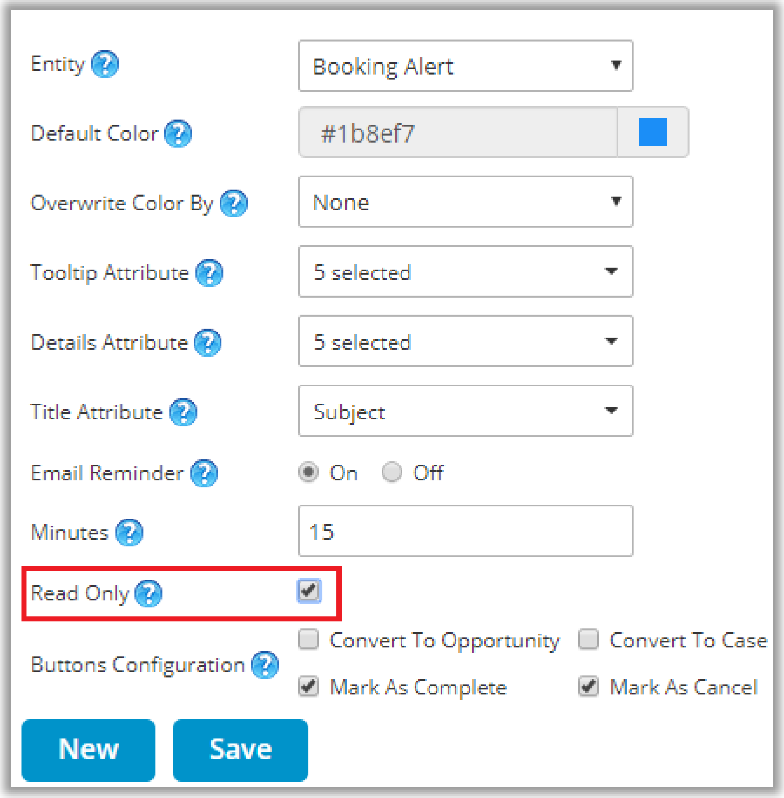


- Click on **'Custom Activity'** tab under **'Activities'** section.

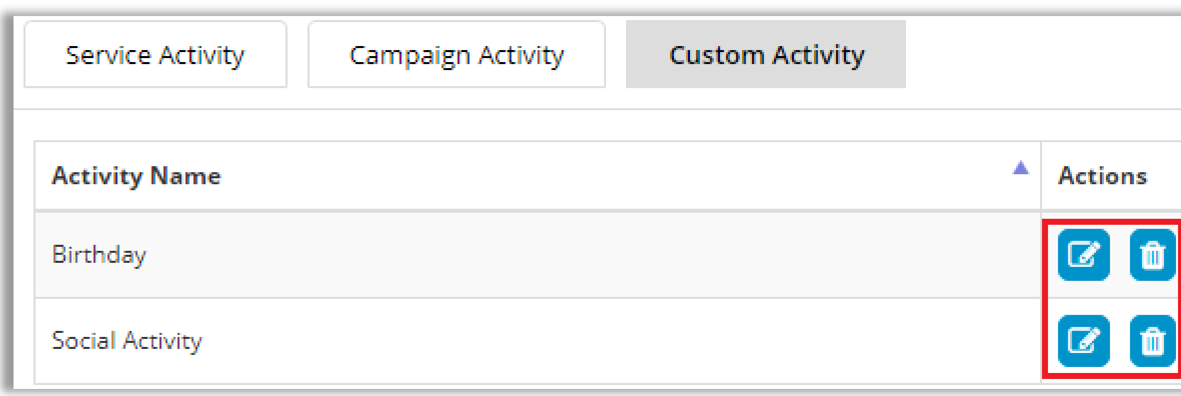


- Now click on 'New' button to create a custom activity.

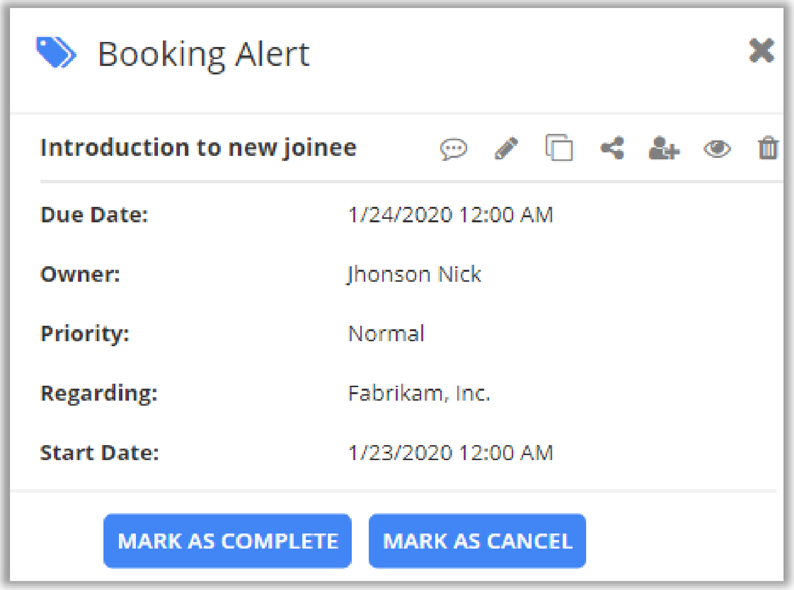
- Thereafter, following fields will appear under 'Custom Activity' tab:



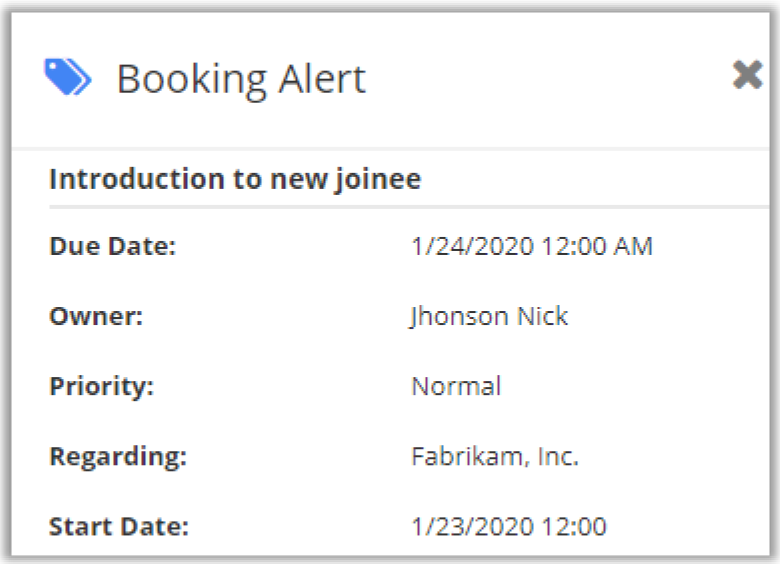
- Select required 'custom' activity from the drop-down list of **Entity**.
- **Read Only**: If you tick the checkbox 'Read Only', no one will be able to edit the custom activity except for admin.
- As you click on **Save** button, you will get a popup message of activity successfully added.
- You can 'Edit' and 'Delete' the Custom activities you have created.



- **Without** ticking the **Read Only** checkbox, any of the CRM users can edit and perform the action for custom activity.

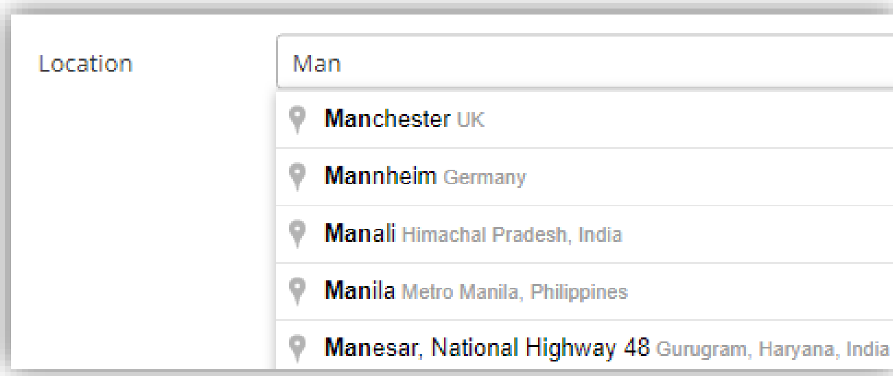


- If you have ticked the **Read Only** checkbox, you cannot edit and perform any action for the custom activity.



Location:

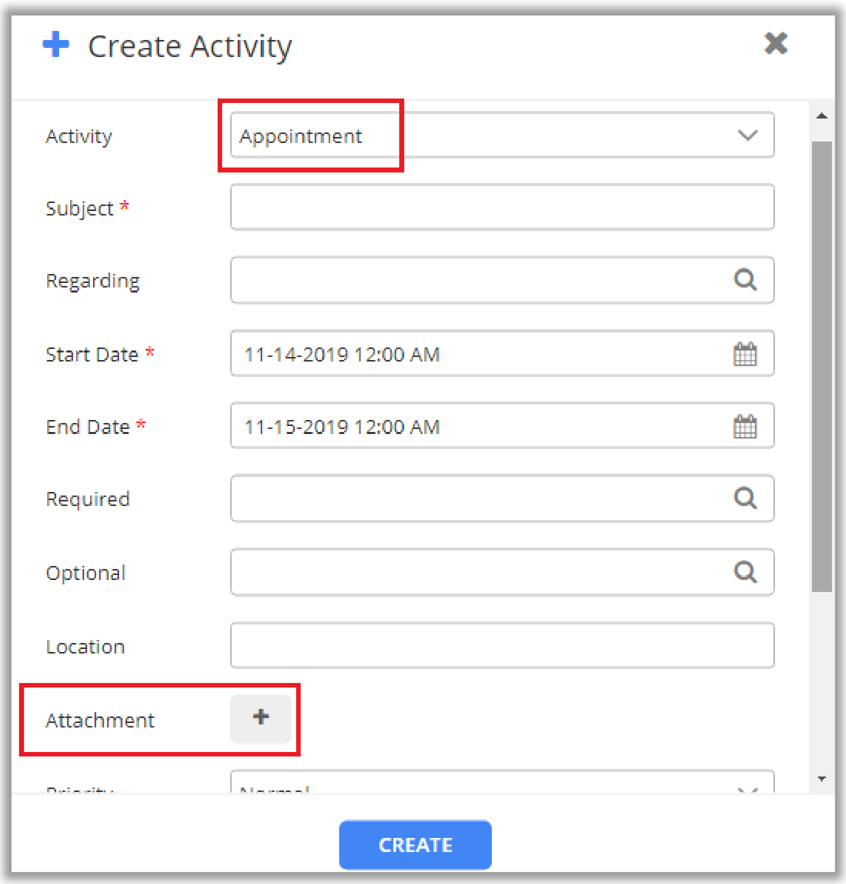
- If location suggestions are active from the 'Configurations' page, you even get location suggestions based on keyword entered under location option.



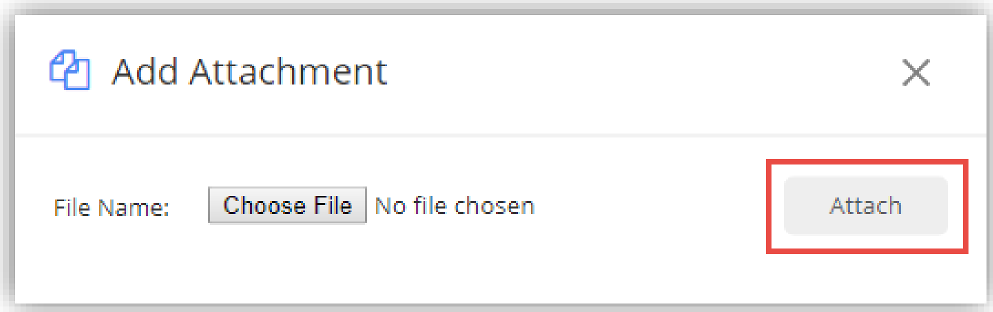
Note: Location option is enabled only for 'Appointment', 'Recurring Appointment' and 'Service Activity'.

Attachment for Activity:

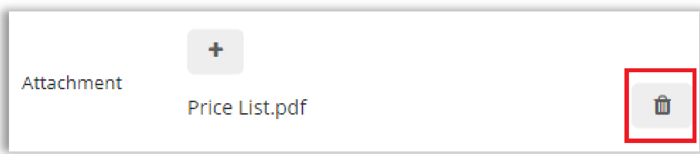
- Attachments facility is given only for the **Email**, **Appointment** and **Custom** Activities.
- To add an attachment for the activity, you will find **Attachment** option. By clicking on **+** icon, **Add Attachment** popup will appear.



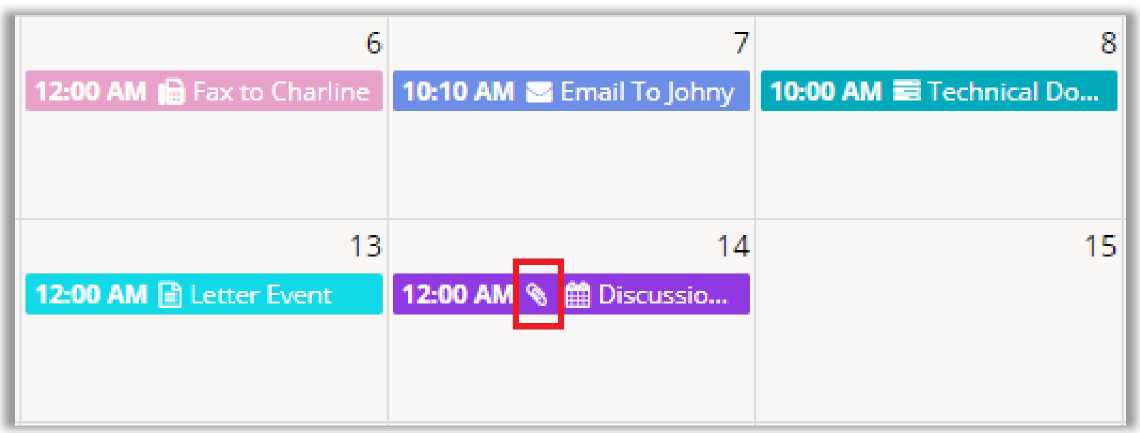
- Now choose the file to be attached as attachment and click on **'Attach'** button.



- On clicking 'Attach' button, attachment will be shown in "Create Activity" dialog box along with delete icon. Clicking on 'Delete' icon will remove that activity.

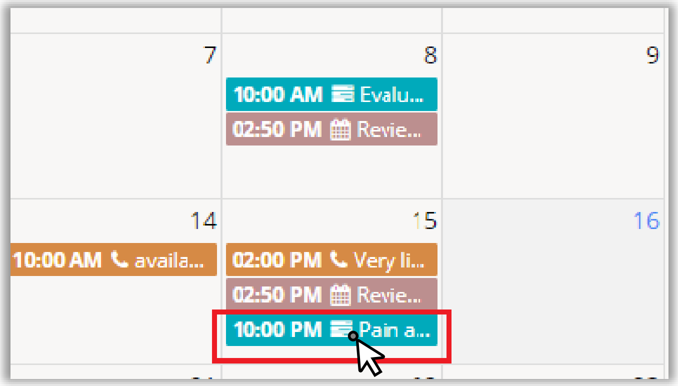


- Thereafter click on **Create** button to complete activity creation with attachment.
- 'Attachment' icon will be displayed on the activities in the calendar for which the attachments were added.

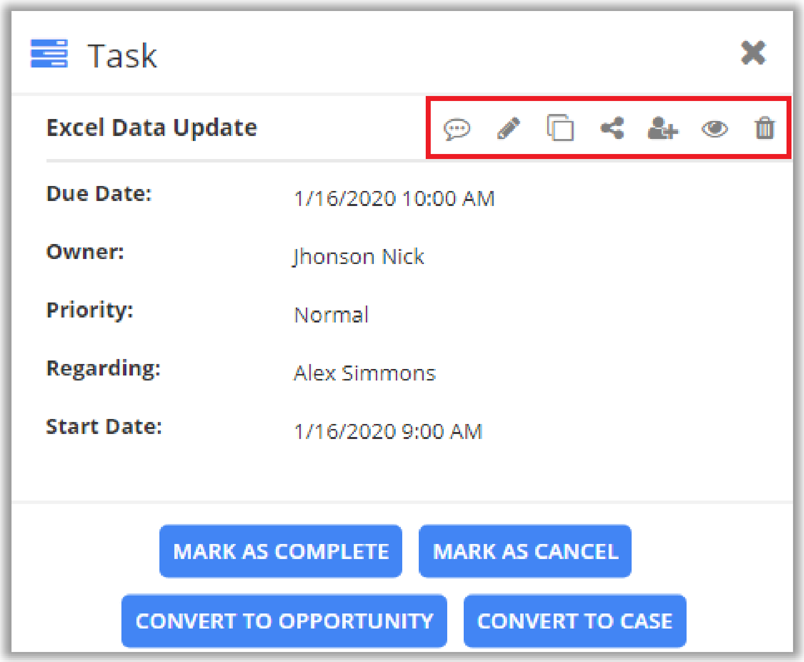


View Activity:

- To view detail of any activity, simply click on activity.



- Clicking on the activity, the detail dialog box contains all those fields and actions buttons that are enabled from the 'Configurations' page will appear.
- User can perform multiple actions such as:

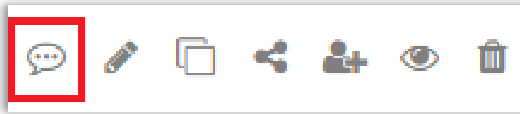


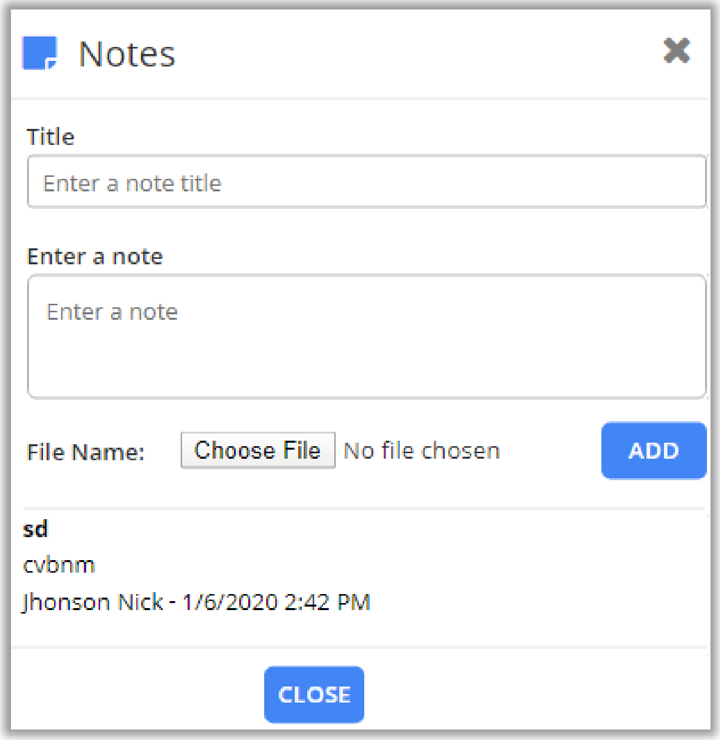
- View **Note**
- **Edit** the activity
- **Copy** activity
- **Share** an activity to other user via email
- **Re-assign** activity to another user or team
- **View** activity in CRM
- **Delete** the activity.

- From this Activity Detail dialog box, you can perform resultant action for the activity.
- You can perform actions:
  - Convert to opportunity
  - Convert to case
  - Convert to lead' (Only for email activity)
  - For ending the activity, you can perform action like Mark as complete, Close campaign activity (Only for campaign activity), End series (Only for recurring appointment).

View Note:

- Click on 'Note'  icon to view and add any notes.



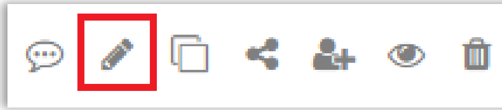


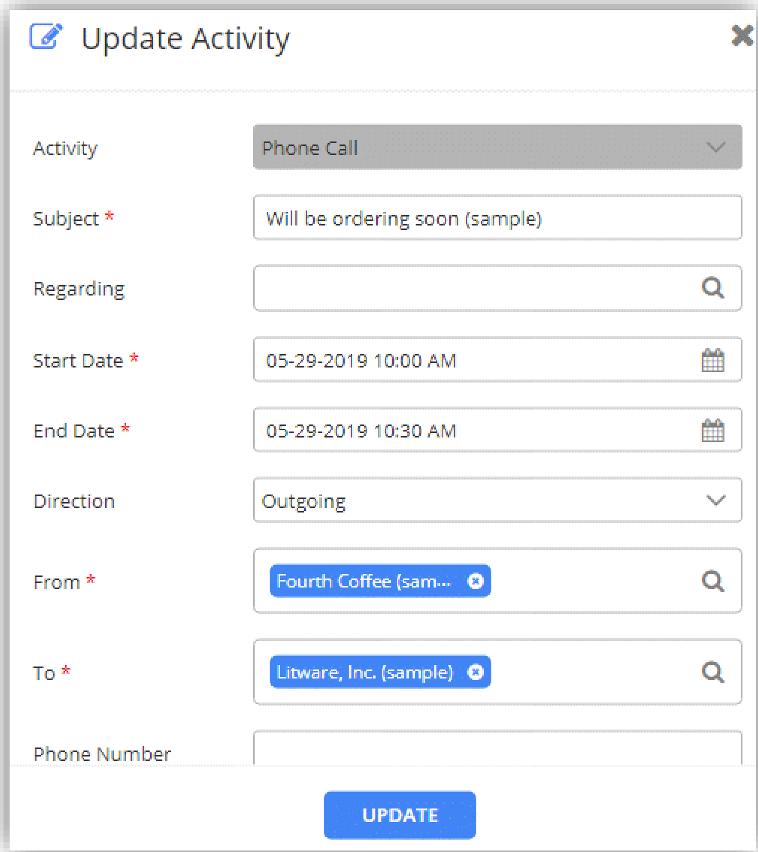
- By clicking on 'Notes' icon, you can check the details of added notes for this activity.
- You can attach the file if required.

<u>Note</u>: All the CRM users can check and add notes.

Edit Activity:

- Click on 'Edit' icon to edit any created activity.

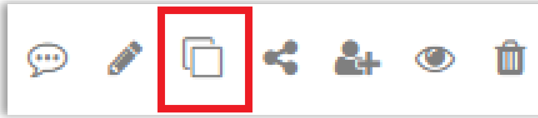


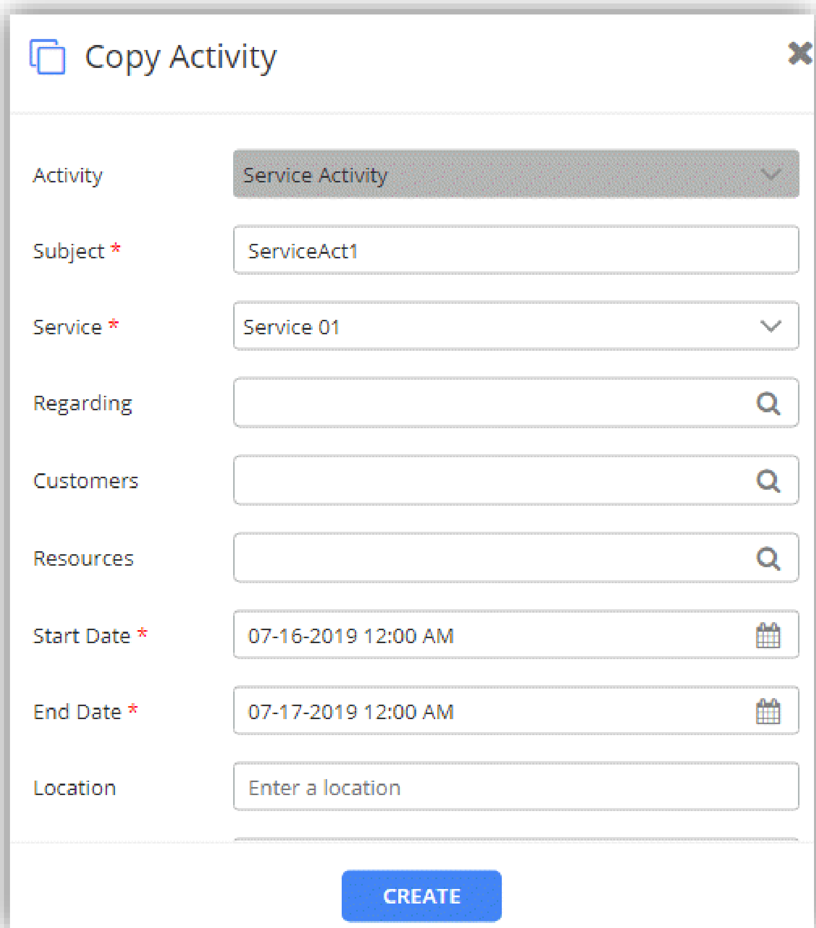


- On clicking edit icon, it opens activity details in edit view.
- Update or change the details and then click on **Update** button to save changes to the activity.

Copy Activity:

- Click on copy activity icon, to copy activity details. Clicking on copy icon you can edit all the details if required.

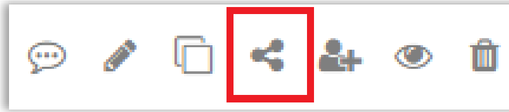




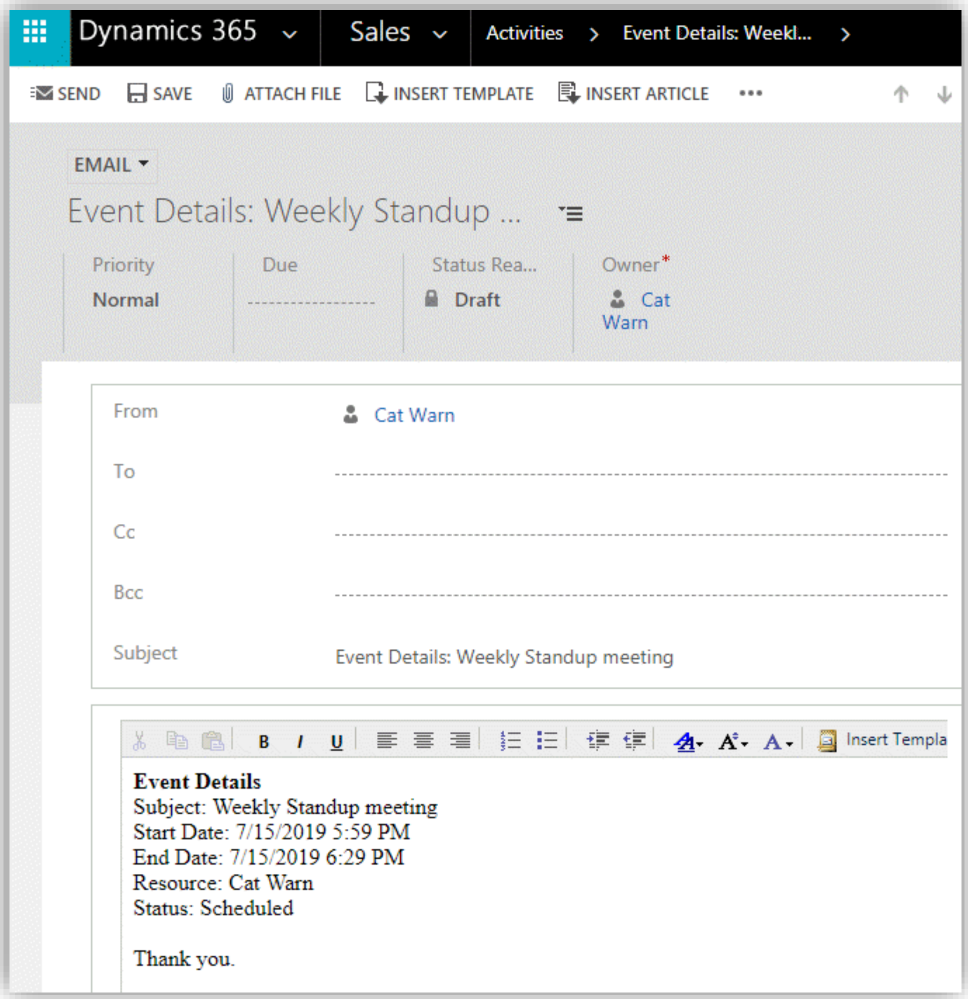
- Click on **Create** button to complete the activity creation. If you don't edit and save it as it is, it would create a duplicate of the activity.

Share Activity:

- If activity is to be shared to other users via email, click on share icon available in the activity detail pop up.

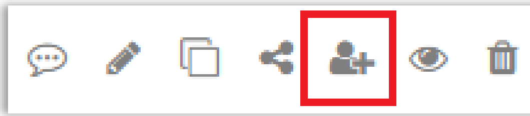


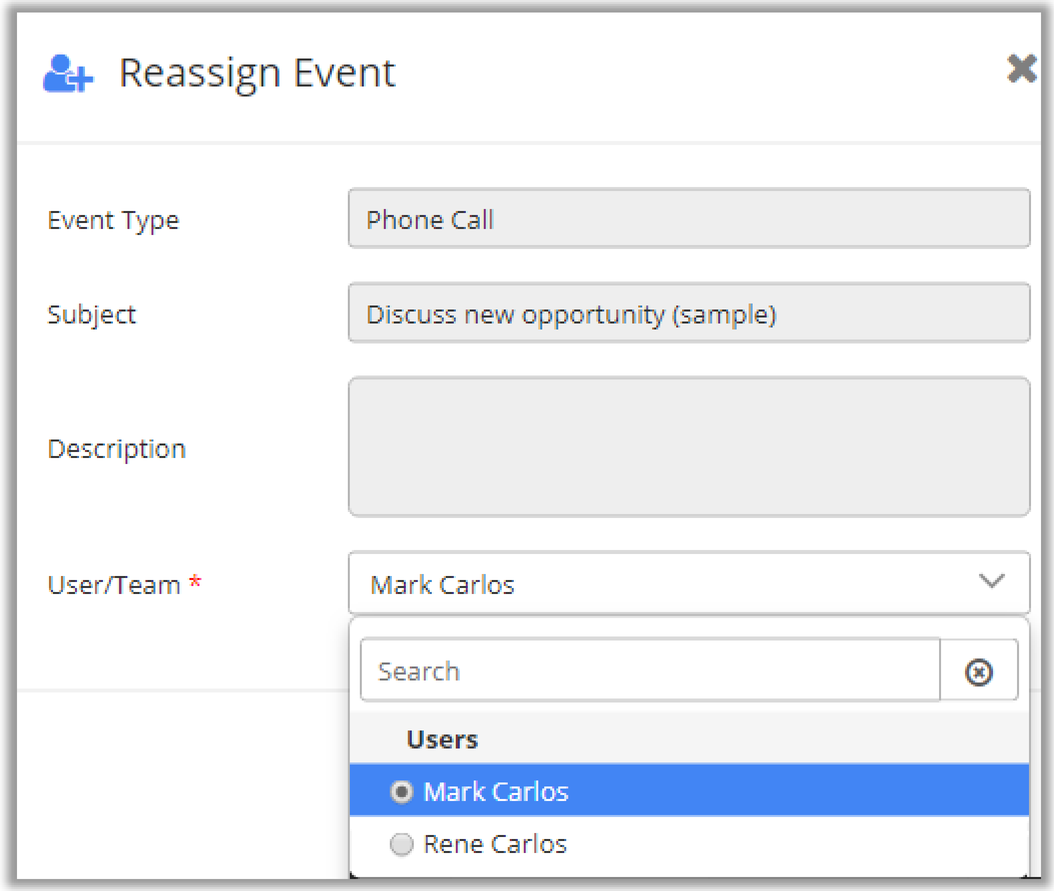
- Clicking on icon, it redirects to CRM page to email the activity details.



Re-assigning Activity:

- To reassign activity, click on activity. It opens a dialog box. Click on ' 'icon.



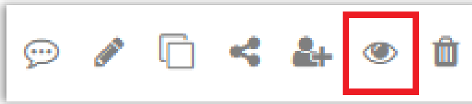


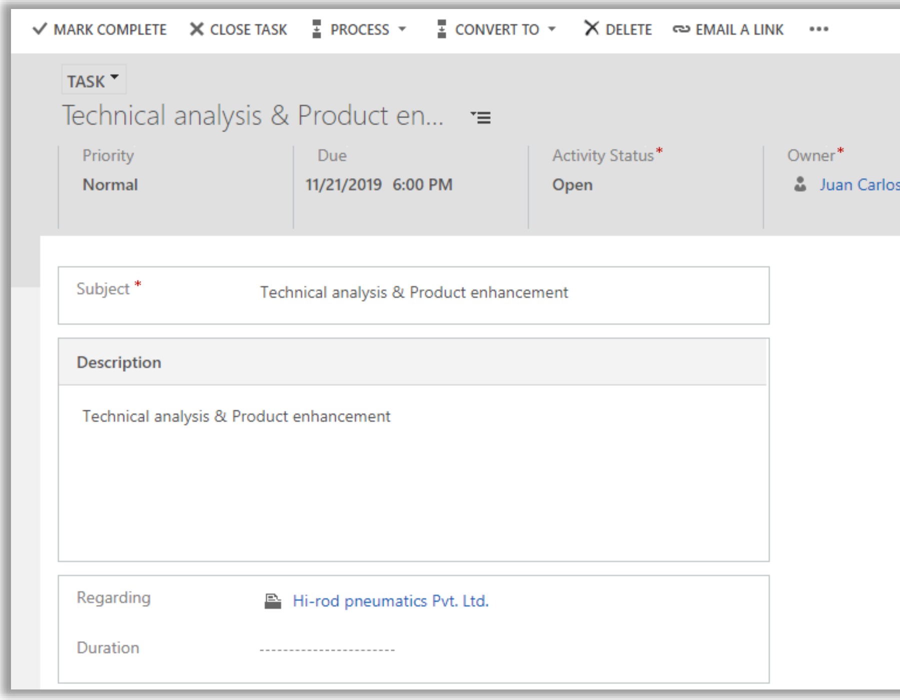
- Select the user or team from look up records box to which the activity is to be reassigned.

Note: To reassign any activity to any user or team, they should have roles defined or else it will prompt error message.

View Activity:

- Clicking on 'View' icon, the activity record will be shown on CRM page with all the details.

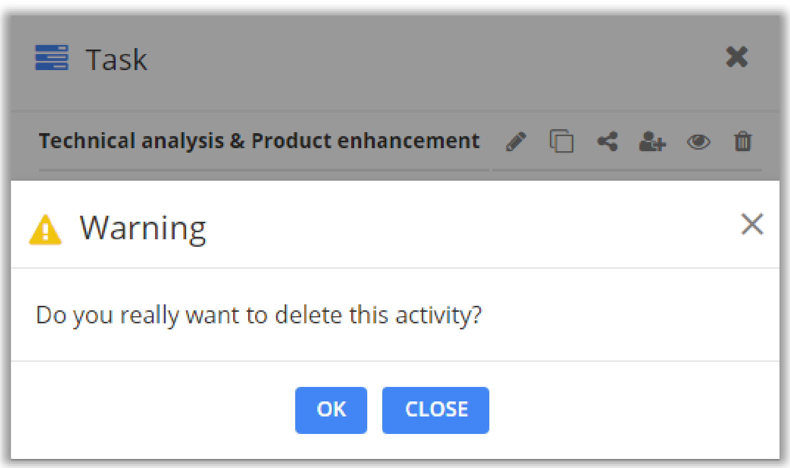




Delete Activity:

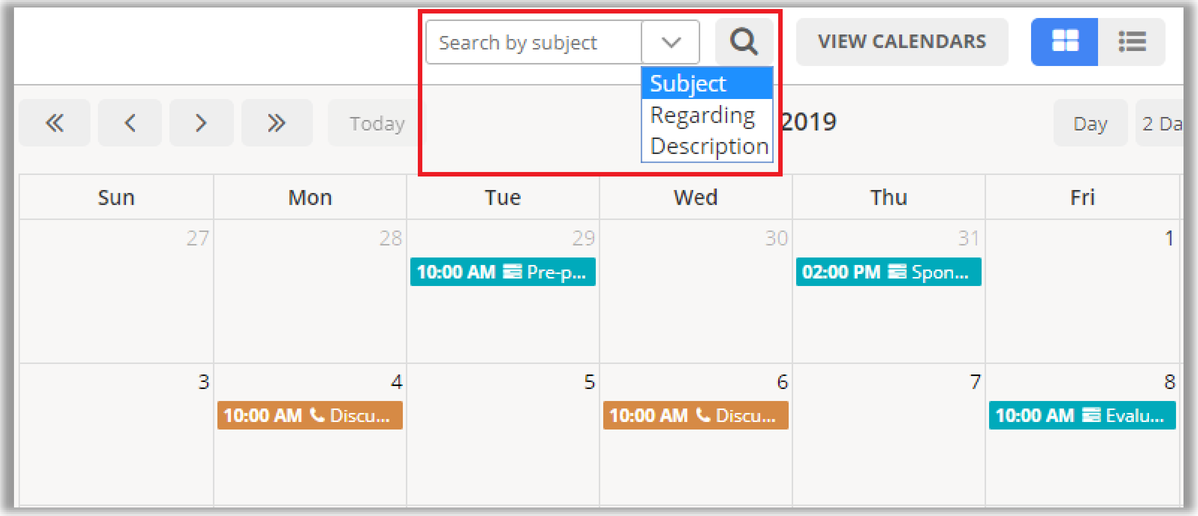
- Clicking on 'Delete' icon, the activity can be deleted from the Calendar page permanently.

- Clicking on Delete icon, a warning pop up message will appear to confirm the action.



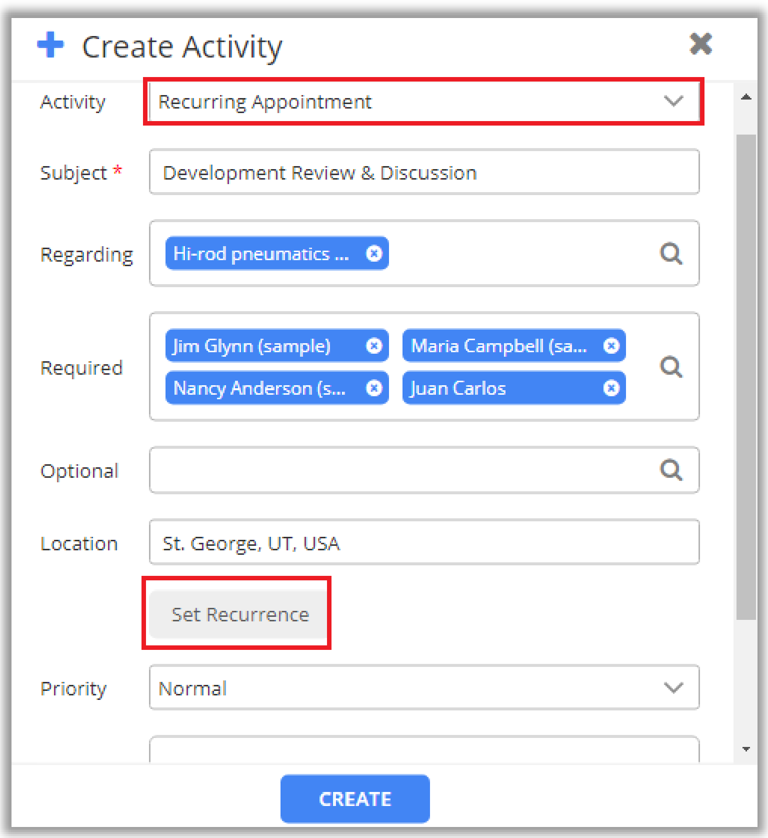
Search Activity:

- You can search any activity by three options: **Subject**, **Regarding** and **Description** that are inserted in the activities.
- Select any search option among three and click on search icon and it will show all activities with that keyword in the search text box.

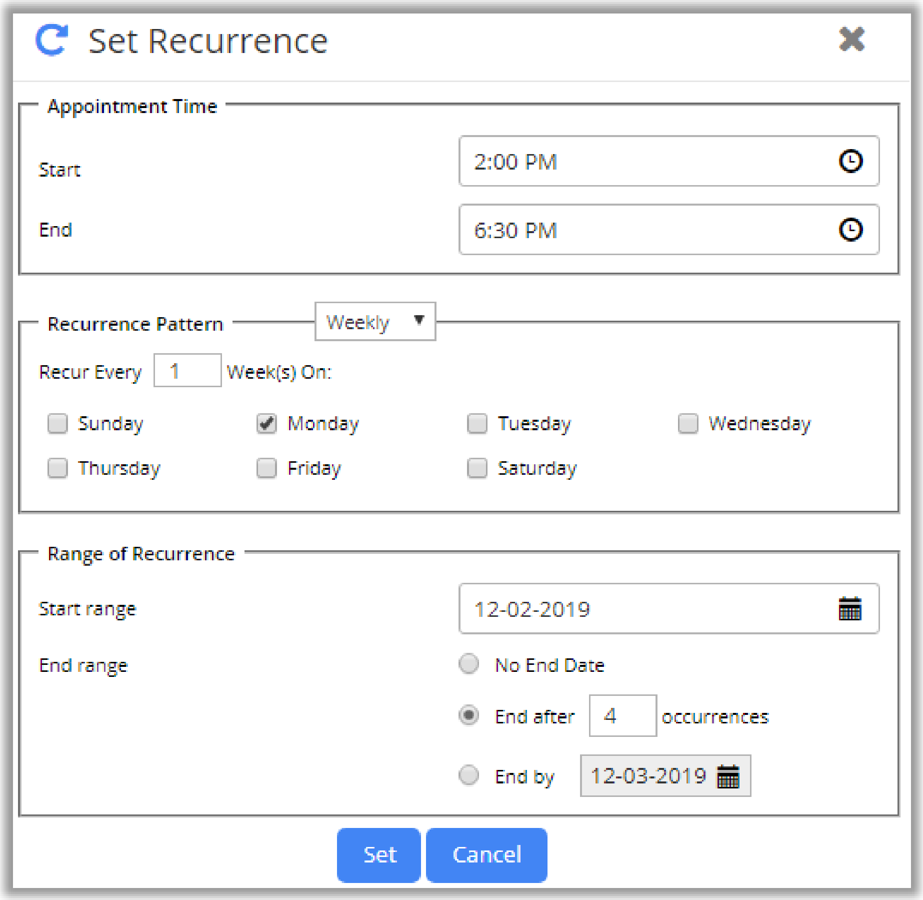


- It will display only those activities that full fill search criteria based on selection of Search options.

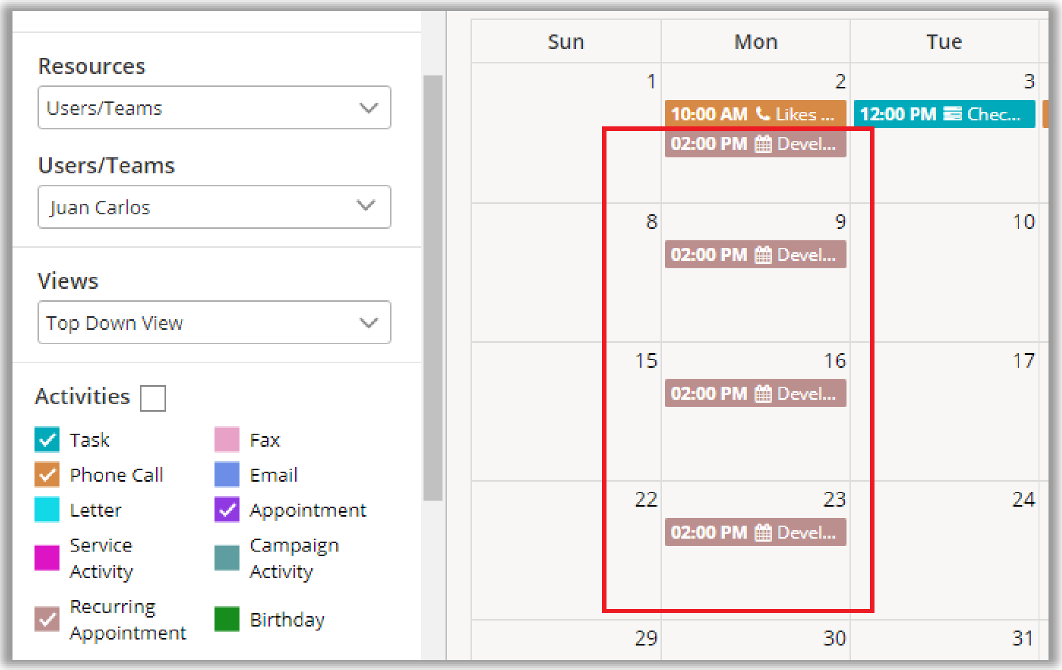
Recurring Appointment:



- To create recurring appointment, select activity type as ‘Recurring Appointment’.
- After Inserting all the required details. Click on **Set Recurrence** button to set recurring details.
- By clicking on ‘Set Recurrence’ button, the pop-up named **Set Recurrence** will appear.



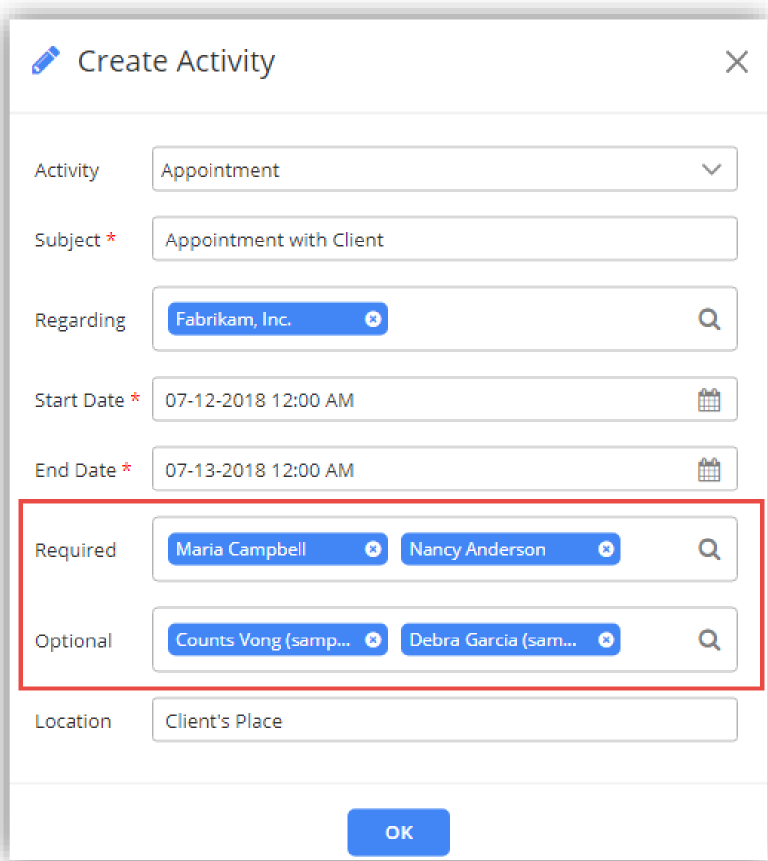
- Insert the details as below:
    - **Appointment Time**: Select Start/End Time
    - **Recurrence Pattern**: Daily/Weekly/Monthly/Yearly
        - Daily: Select day intervals or select weekdays.
        - Weekly: Insert week(s) on selecting Days.
        - Monthly: Insert Date of every month or select interval of days/week/weekends.
        - Yearly: Select Month with a date or select interval of days/weeks/weekends by selecting a month.
    - **Range of Recurrence**:
        - **Start Range**: Select starting date
        - **End Rage**: Insert the 'number of occurrences' when it will end or 'End by' selecting a particular 'date' or selecting 'No End Date' if the ending date is not defined.
- After inserting and selecting all the details, click on **Set** button to save recurrence and then click on **Create** button to complete the recurring appointment creation.



- Now you can see the recurring activities in the calendar as per Set Recurrence details.

Share Activity:

- You can share the activities in which the multiple resources are involved.



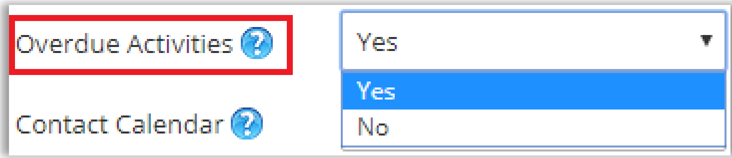
- While creating the activities in which multiple resources are selected, the activity will automatically be assigned to the resources and those activities will be displayed in their calendar as well.
- In appointment activity, one needs to mention required and optional users while in case of other activities it appears as from and to.

Note: For activity to be visible in multiple calendars, users should be selected in the look up record option.

All the activities can be shared with multiple resources except **'Task'** Activity.

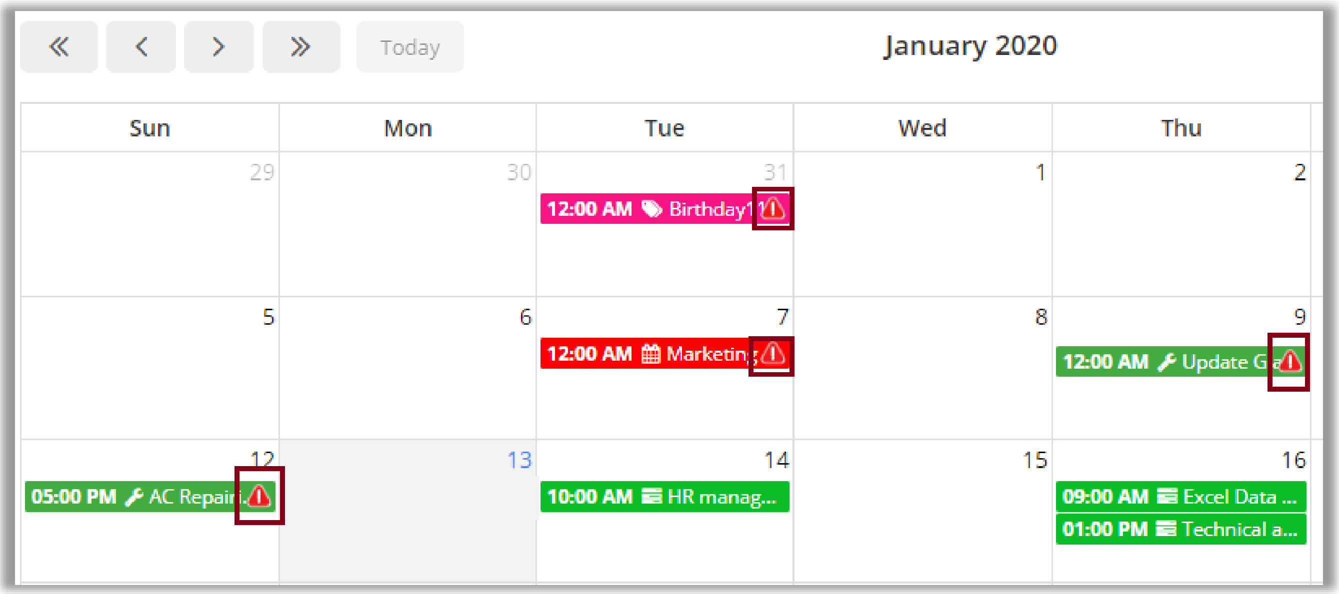
Overdue Activities:

- You can configure ‘Overdue Activities’ by selecting ‘Yes’.



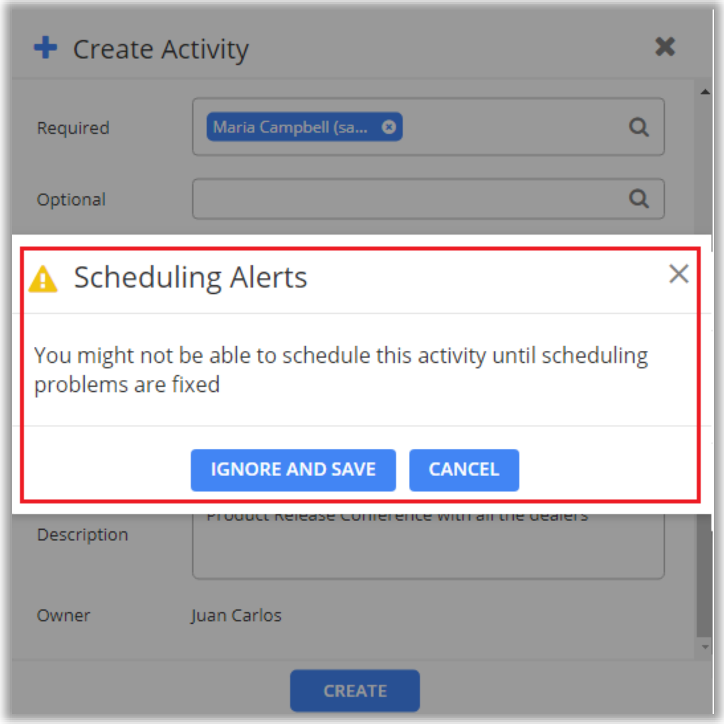
Overdue activity on Calendar

- If you have selected **Yes** for ‘Overdue Activities’ in Backend configuration, the **expired activities** will be highlighted with ‘red’ alert mark.

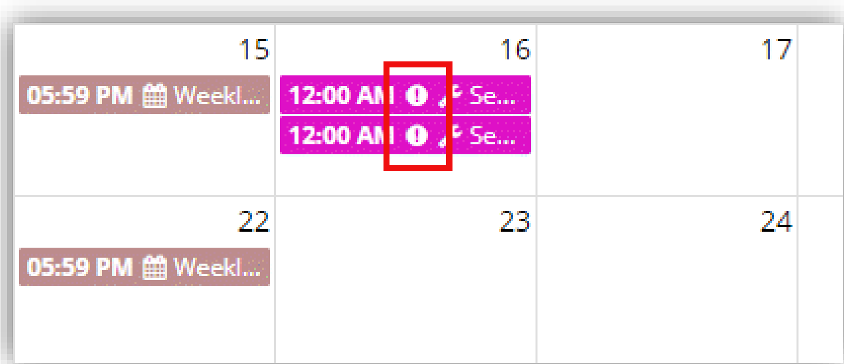


Conflict Management:

- On creating all the activities except Custom activity, if scheduling of any activity conflicts with the same activity it shows alerts only if enabled from the backend configurations.



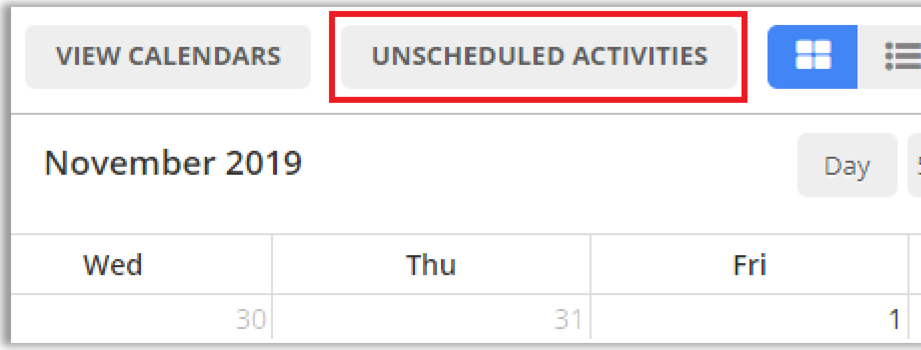
- On clicking **Ignore and Save** button, activity gets saved but with conflicting error message on the activity. Clicking **Cancel** button, scheduling gets cancelled and you again get to re-schedule date and time of the activity.



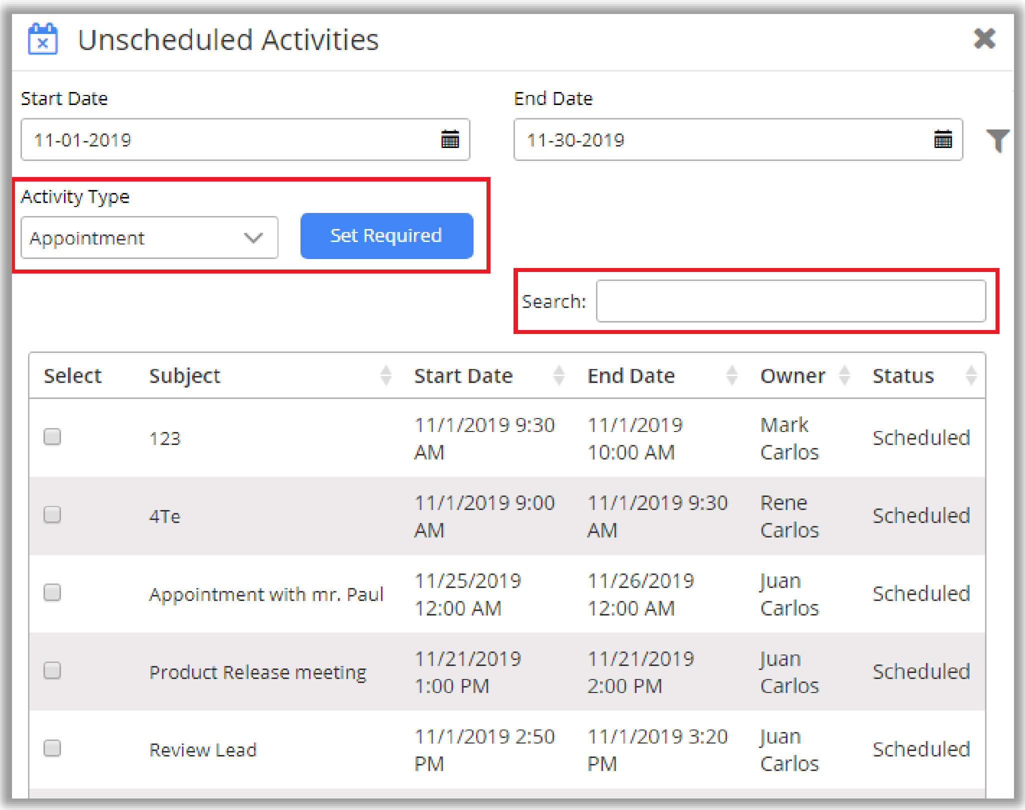
Note: You get scheduling alerts for all the activities except Custom activity. And it works only if conflict management is enabled from configuration page.

Unscheduled Activities:

- If you have enabled the **Unscheduled Activates** option from the configuration and the 'Appointments' and Service activities' don't have any required **attendees** and **assigned resources**, the **Unscheduled Activities** button will appear on the header in the Calendar page.

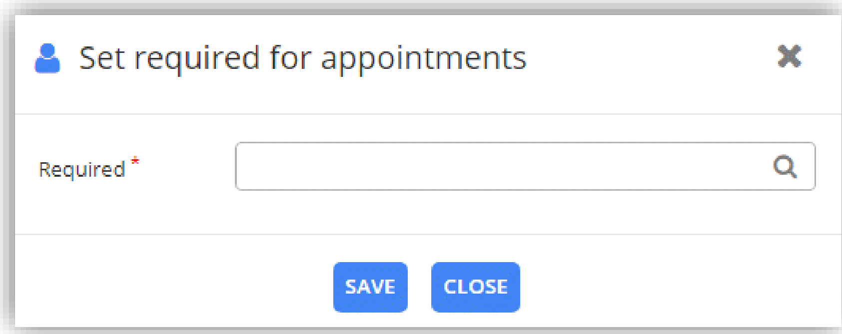


- It opens dialog box with list of Unscheduled Activities.
- This list comprises of two activities based on activity type selected. Start and End date filters to filter activities along with search box to search activities.

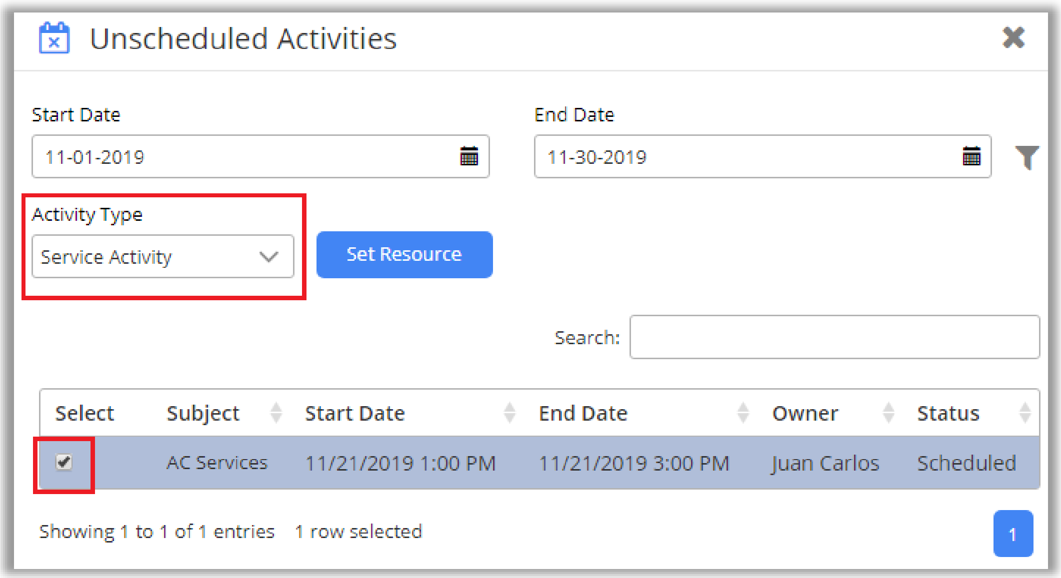


- If activity type is 'appointment', it shows all the appointments that don't have any required attendees assigned.
- To assign attendees to an appointment, select **appointment** as the 'activity type' from the dropdown, select activities and click on **Set Required** button.
- Clicking on 'Set Required' button, it will open dialog box to select required attendee.

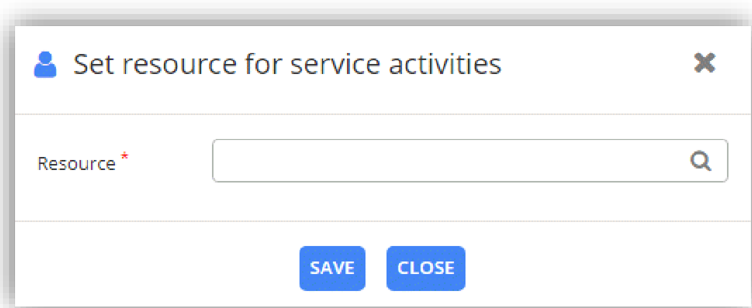
- Select the attendee as required and click on **Save** button.



- Upon saving, attendees get assigned and that activity gets removed from the list of unscheduled activities.
- If 'activity type' is **service activity**, it shows all the service activities that don't have resources assigned.
- To assign resources to the service activity, select service activity as the activity type from the dropdown, select the service and click on **Set Resource** button.



- Clicking on 'Set Resource' button, it will open dialog box to select required resources. Select them as required and click on Save button.



- Upon saving, resources get assigned and that activity gets removed from the list of unscheduled activities.

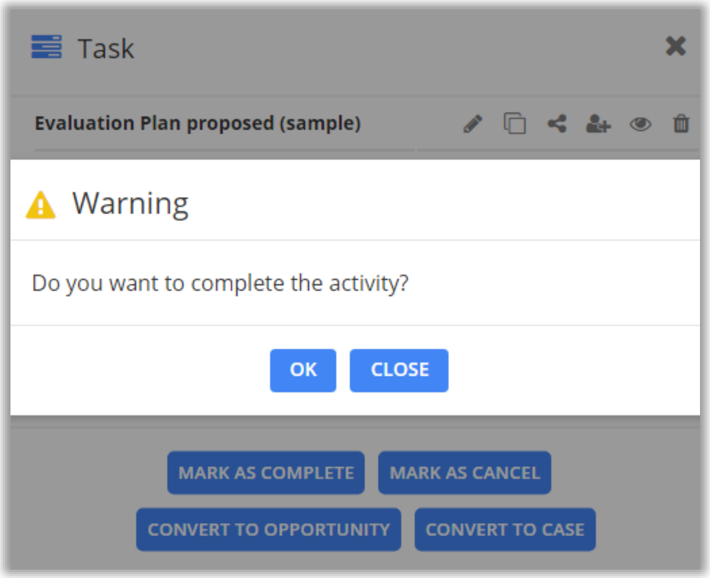
Activity Action

- Activity Action: You can perform the relevant action for the activities.
  - Mark as Complete
  - Mark as Cancel
  - Convert Activity to Opportunity
  - Convert Activity to Case
  - Convert Activity to Lead
  - End Series
  - Deactivate Bookable Resource Booking
  - Reminder of Activity
  - Print Calendar

Clicking on any activity you will get the detail view with activity actions. You can directly complete any activity by clicking on Mark as Complete/Mark as Close and convert any activity to Opportunity/Case by clicking on 'Convert to Opportunity'/'Convert to Case' respectively.

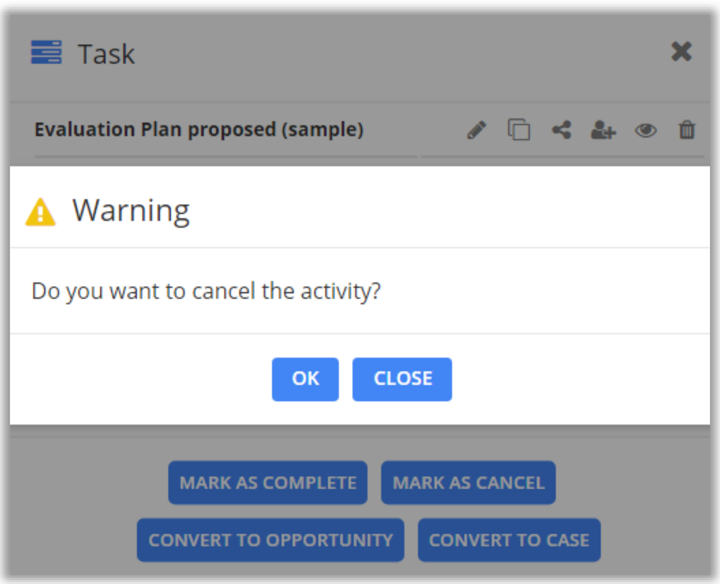
Mark as Complete

- You can directly complete an activity from calendar itself by clicking on **Mark as Complete** button. On clicking this button, warning message appears. Click "OK" to complete the activity and its status is updated as **Completed**.



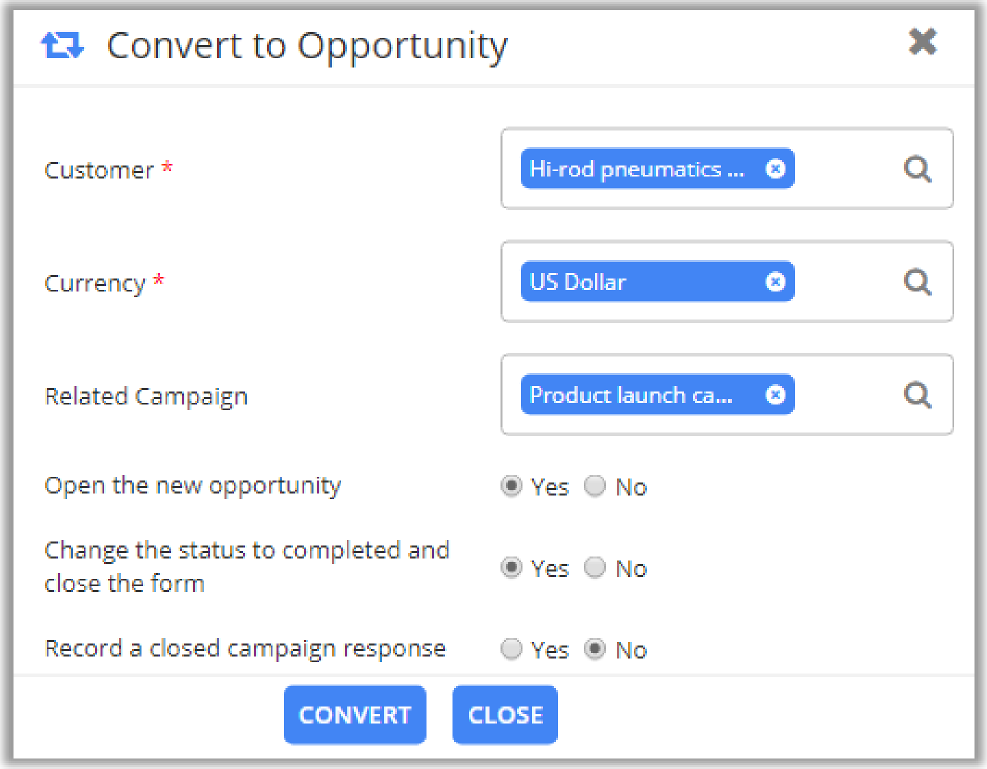
Mark as Cancel

- When you click on **Mark as Cancel** button for an activity, a warning message appears. Click "OK" to remove from the calendar and its status will be updated as **Closed** in the CRM.



Convert Activity to Opportunity

- Activities like Tasks, Phone calls, Letters, Fax, Custom Activities and Emails can be converted to opportunity from calendar directly.

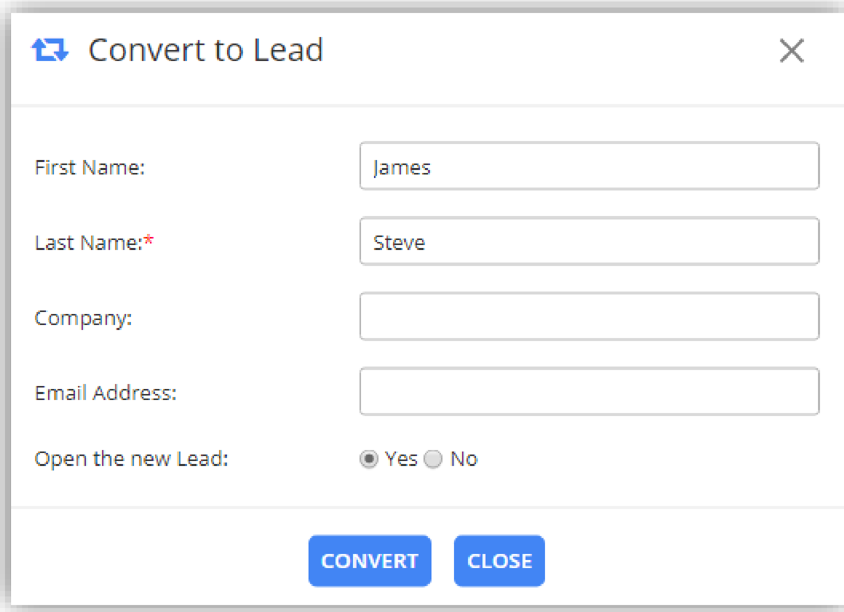


Convert Activity to Case

- Activities like Tasks, Phone calls, Letters, Fax, Custom Activities and Emails can be converted to Case from calendar directly.

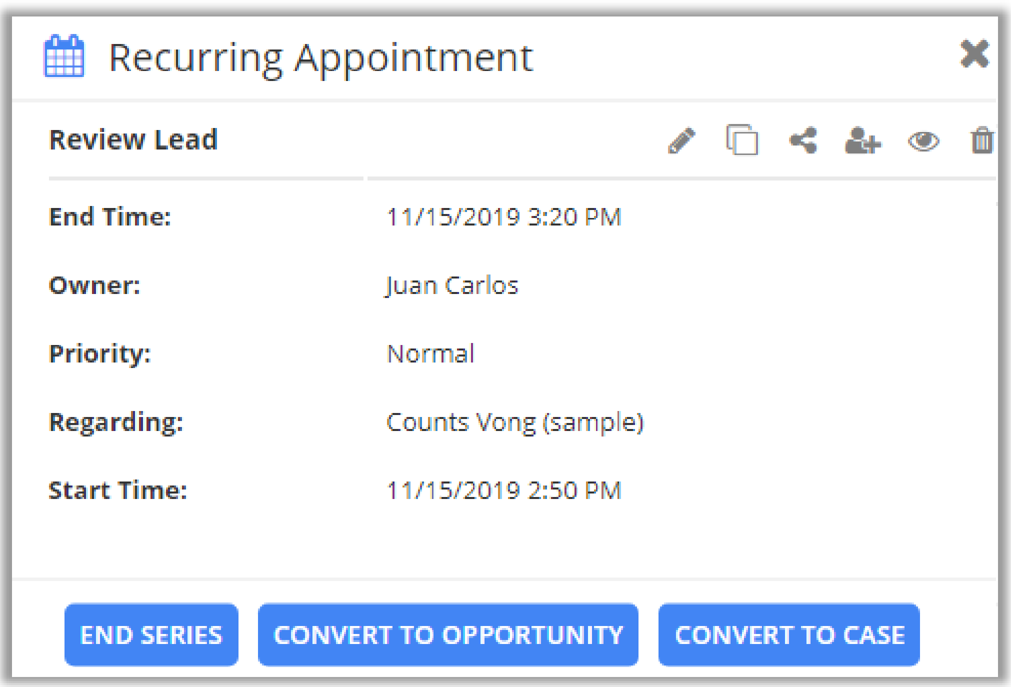
Convert Activity to Lead

- Only **Email** activities can be converted to lead.

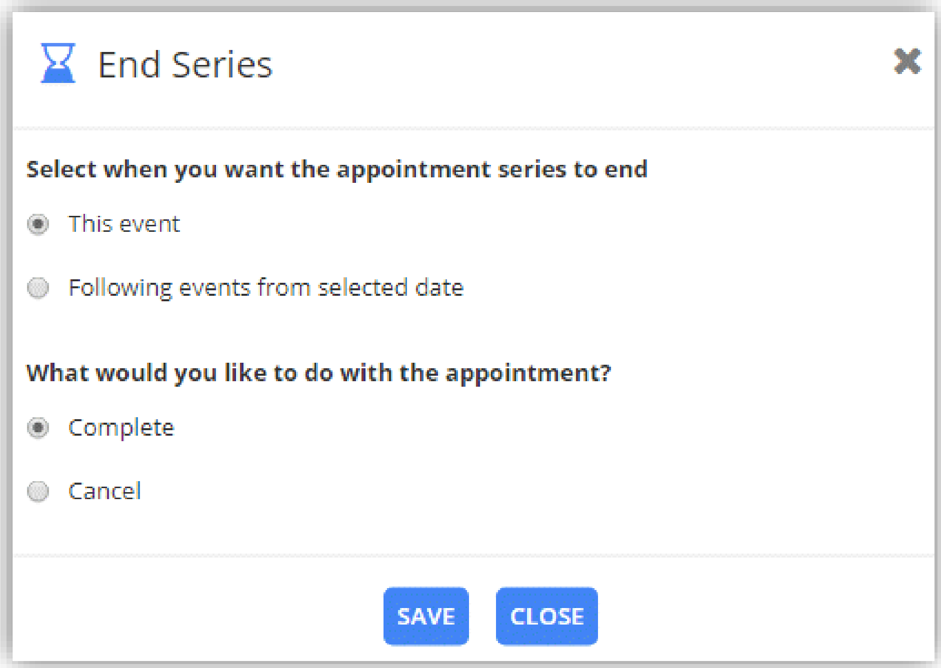


End Series

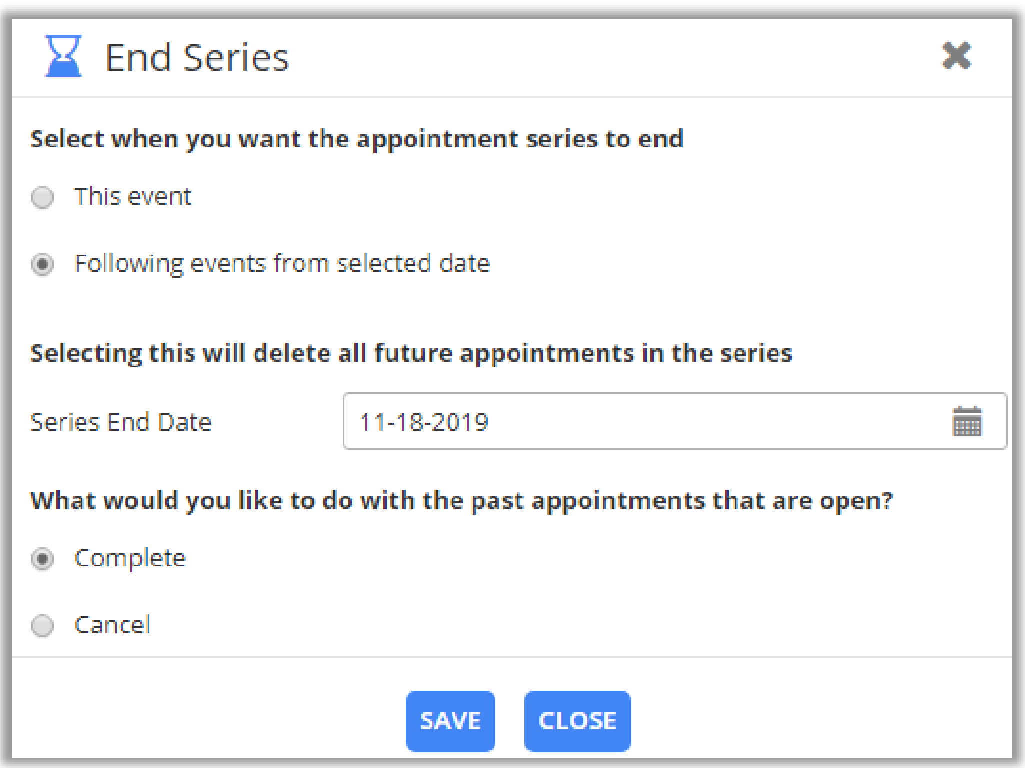
- End series option is available in case of **recurring appointment**.



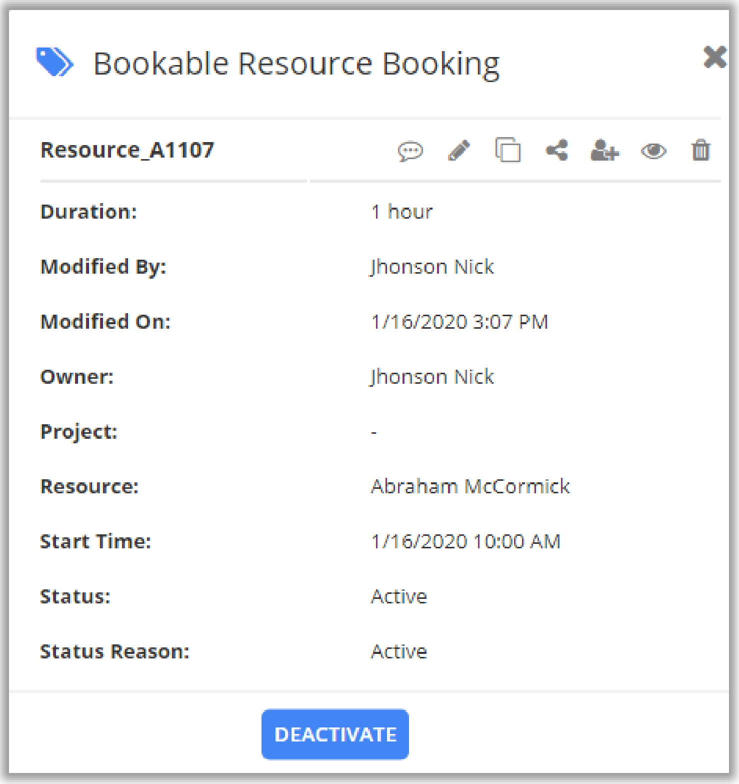
- On clicking End Series button, you need to select when you want appointment series to end. It can be either "This event" or "Following events from selected date".



- If **This Event** option is selected, it ends that appointment by selecting 'Complete' or 'Cancel' the activity. The status will be updated as per selection of Complete or Cancel.
- Selecting **Following events from selected date** option, you need to select series **end date** and the related status. The status will be updated as per selection of Complete or Cancel.



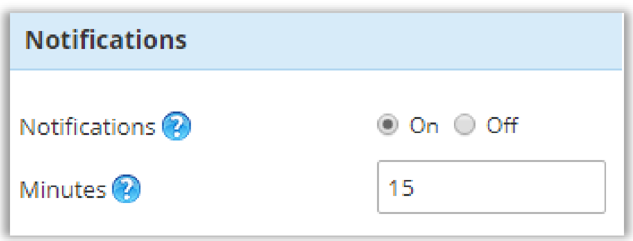
Deactivate Bookable Resource Booking:

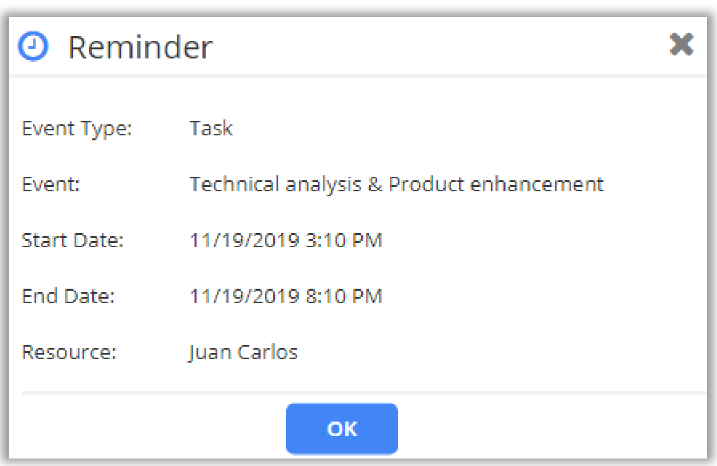


- By clicking on Bookable Resource activity, the details of Bookable Resource will appear.
- You can Deactivate the Bookable Resource Booking by clicking on **Deactivate** button.

Reminder of Activity:

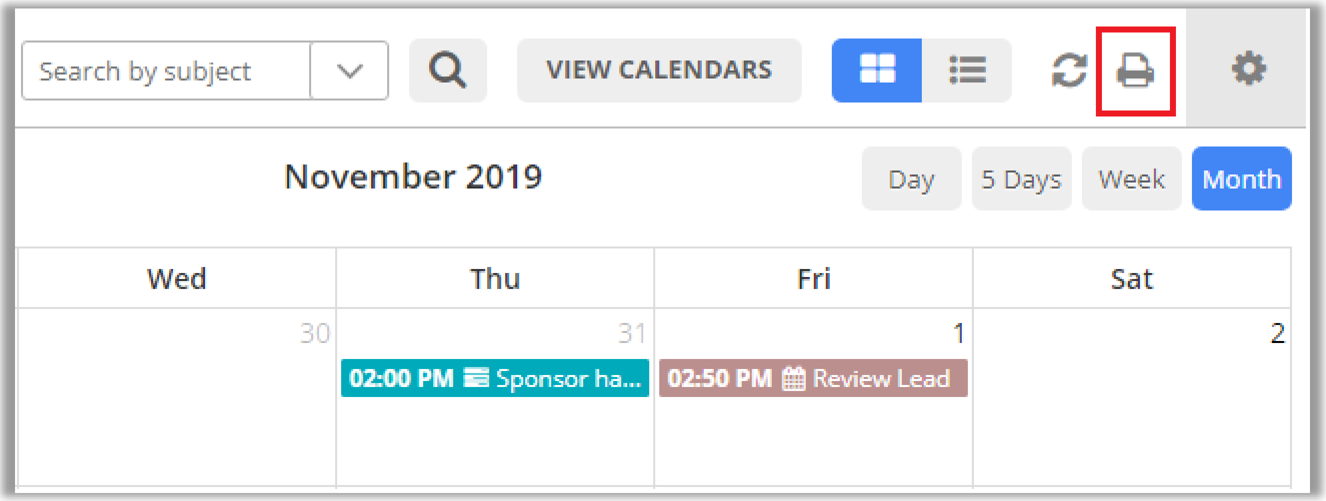
- You will receive a notification for reminder of the activity before few minutes from the start time of the activity set from the backend default configurations.





Print Calendar:

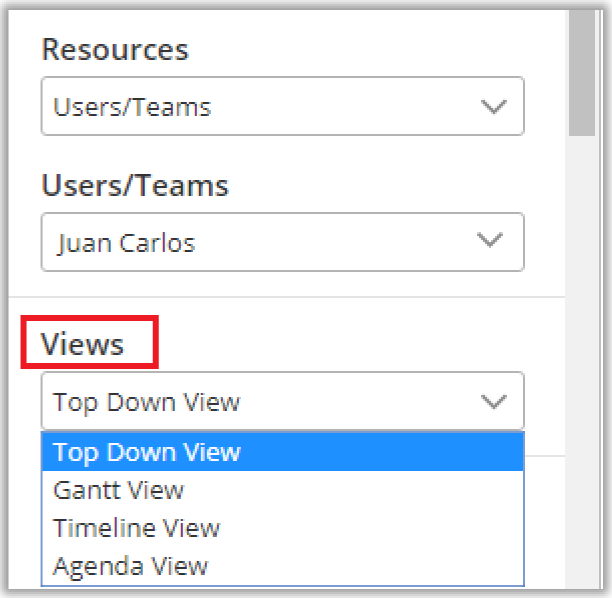
- To print the calendar, navigate to right hand side of the calendar and click on **'Print'** icon.



- You can print the calendar in Portrait view as well as Landscape view in different formats like PDF, XPS Document Writer, directly fax it and save to Google Drive.

Calendar Views

- There are multiple views are given in the Calendar 365 to check the activities as per the schedule days, dates and the times. To view Multiple Views, navigate to **Views** drop down list.



- There are four types of views of Calendar 365 and they are as follows:
  - Top Down View
  - Gantt View
  - Timeline View
  - Agenda View

Note: You can check all Calendar Views in Resource Calendar and Customer Calendars individually.

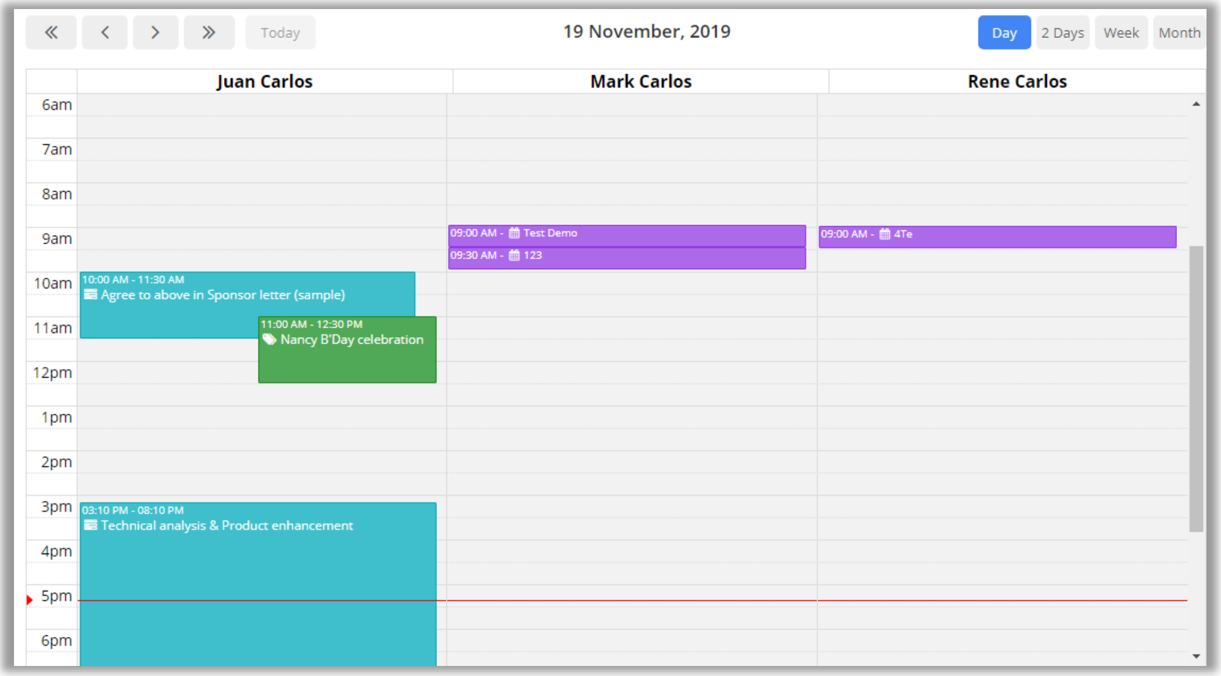
Top Down View

- This view provides you a Top Down view of the calendar in which you can view a column per member on the horizontal axis and time on the vertical axis, and a plain view of activities. Members can be user/team, account, contact or facilities/equipment depending on choice selected by you.

- In addition, you can view the calendar in Top Down View as per the Day, and Week view format.

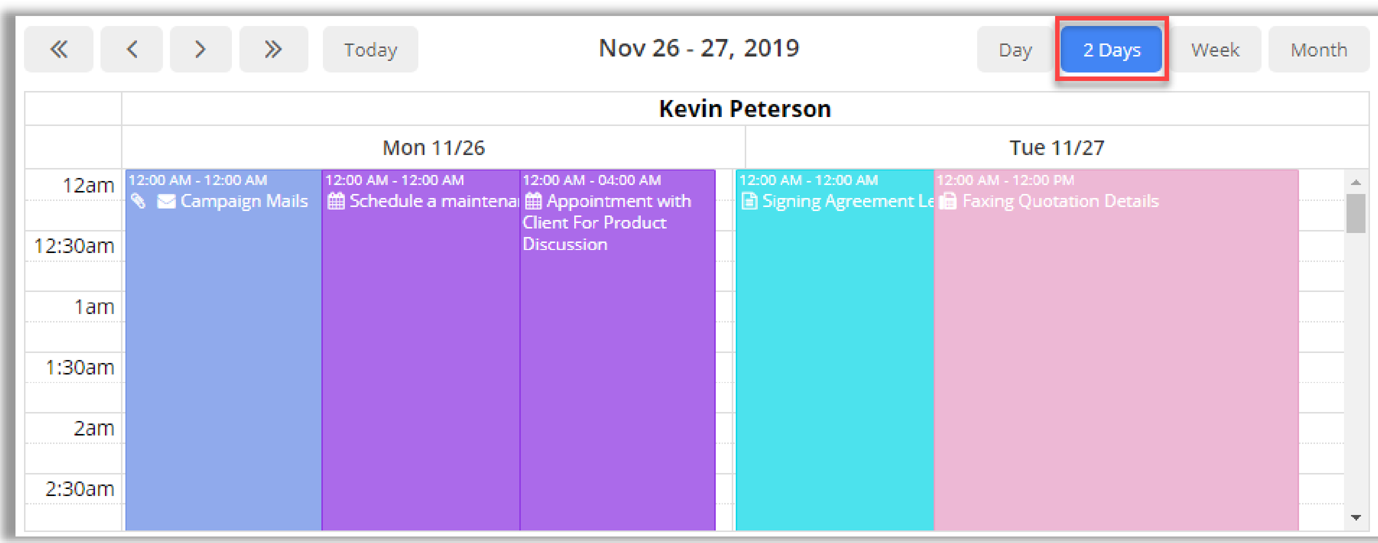
Day View:

- You can see the activities for the day in the Top Down View.



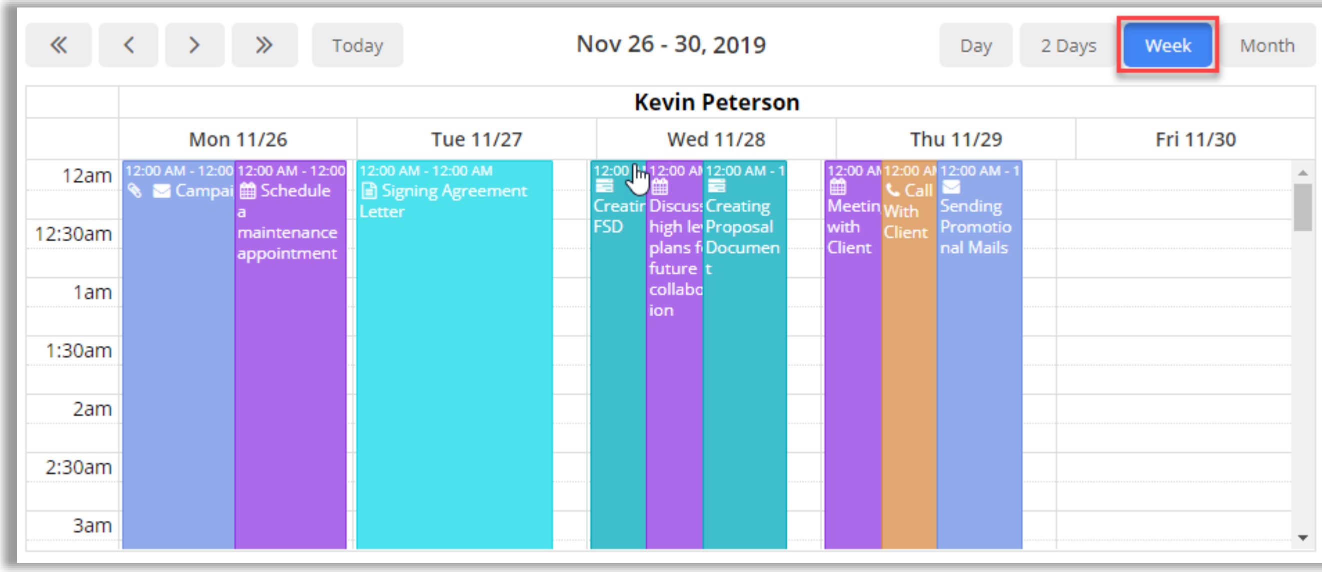
Day Span View:

- You can view the calendar as per the configured Number Of Days from default configurations in Day Span View of Top Down view. You can select days from 2 to 5.



Week View:

- You can see the activities for the week in the Top Down view.



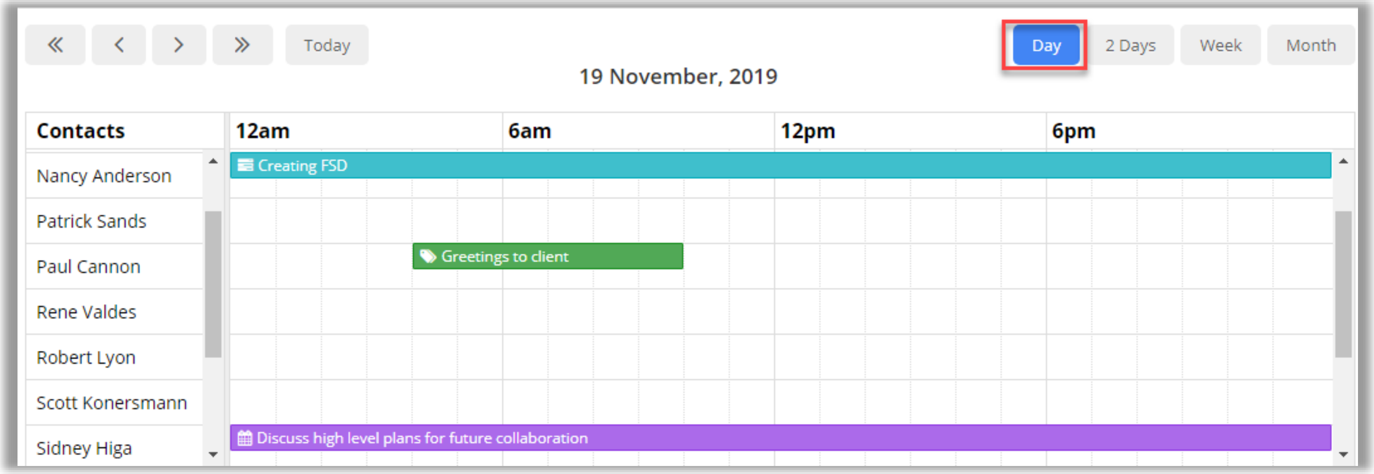
- Similarly, in Month View, you will the details month wise with the dates.

Gantt View

- Gantt view is used for viewing what activity is scheduled to be done at a specific day/time. Gantt view is a horizontal bar chart that visually represents an activity or task with the start and end dates.
- Gantt view in which you can view the Resources or Customers in top down manner and date range in a horizontal display. Here resources can be Team/User & Facilities/Equipment and customers can be Accounts, Contacts, and are displayed based on your selection of calendar view.
- In Gantt view, you can also view all or individual Events (Activities) along with its details like Name of the event, Start date, End date and resource name (As configured to view from the configurations page).
- In addition, you can view the calendar in Gantt View as per the **Day**, **Day Span**, **Week** or **Month format**.

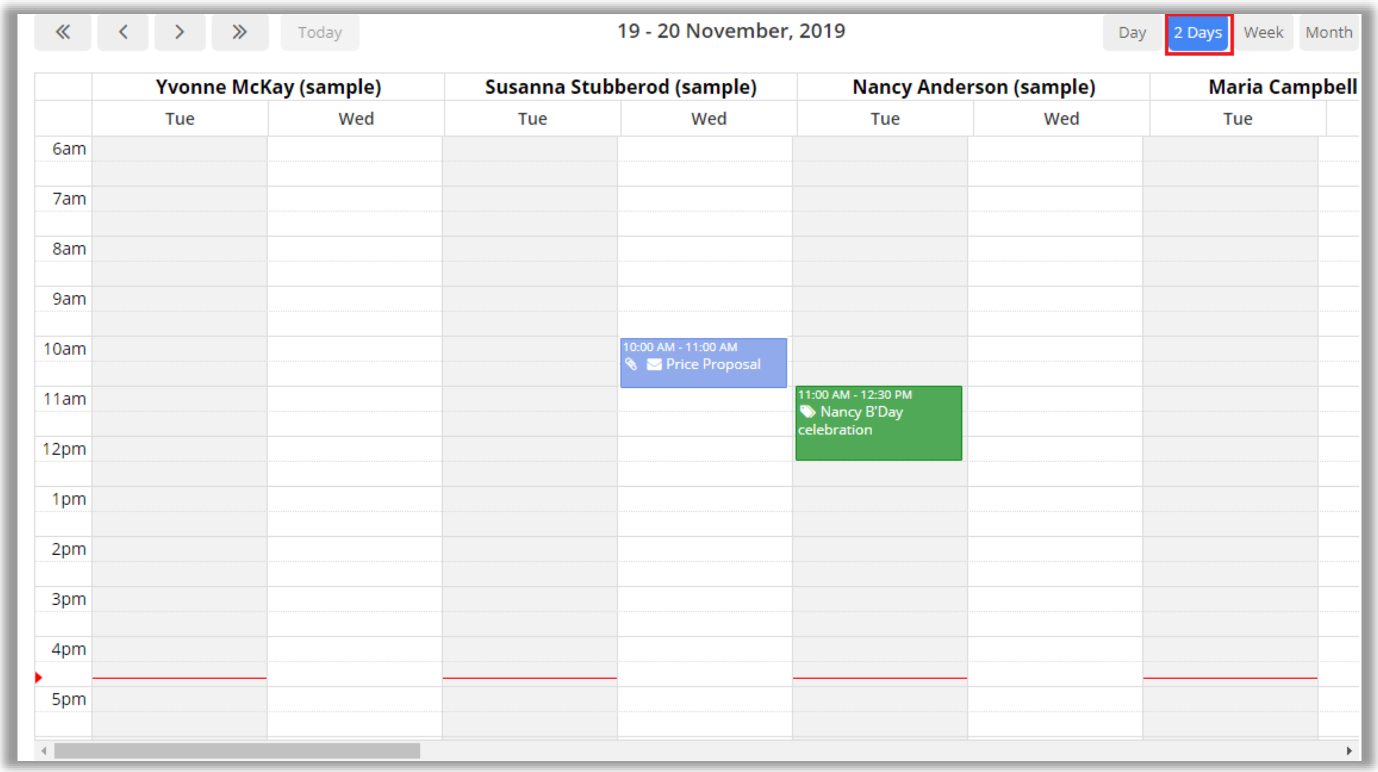
Day View:

- You can see the activities for the day in the Gantt view.



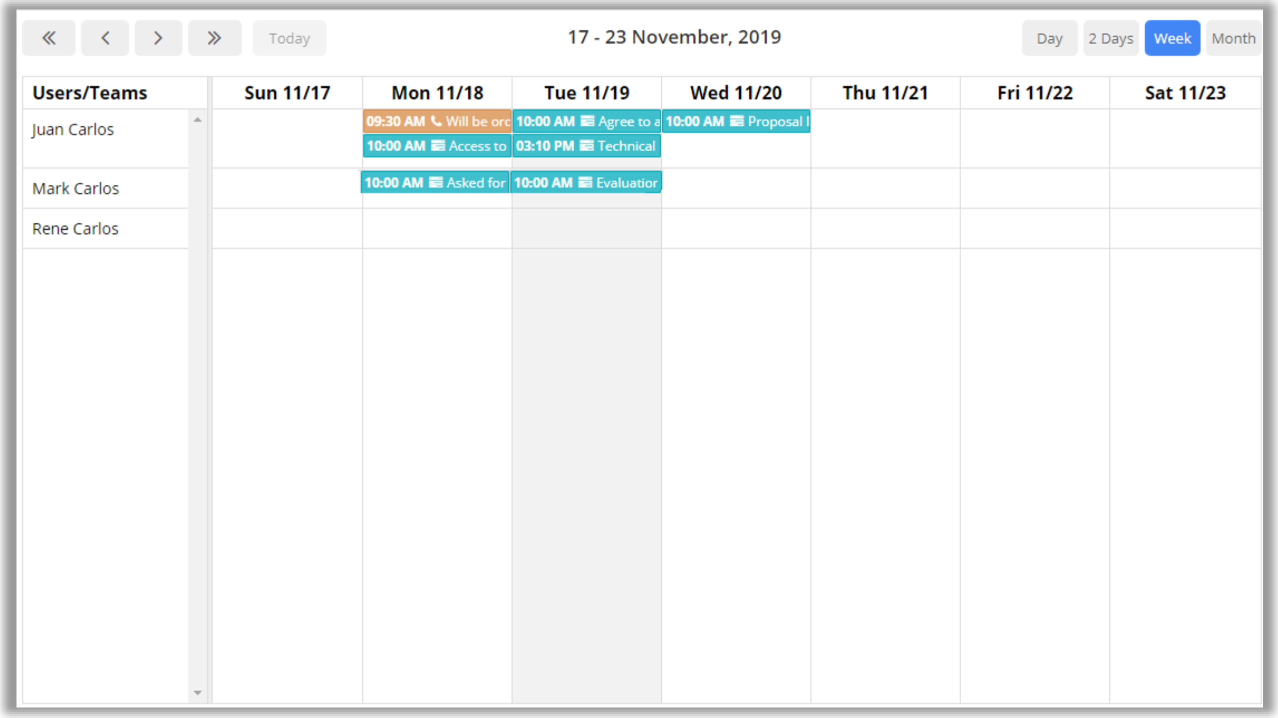
Day Span View:

- You can view the calendar as per the configured Number Of Days from default configurations in Gantt View.



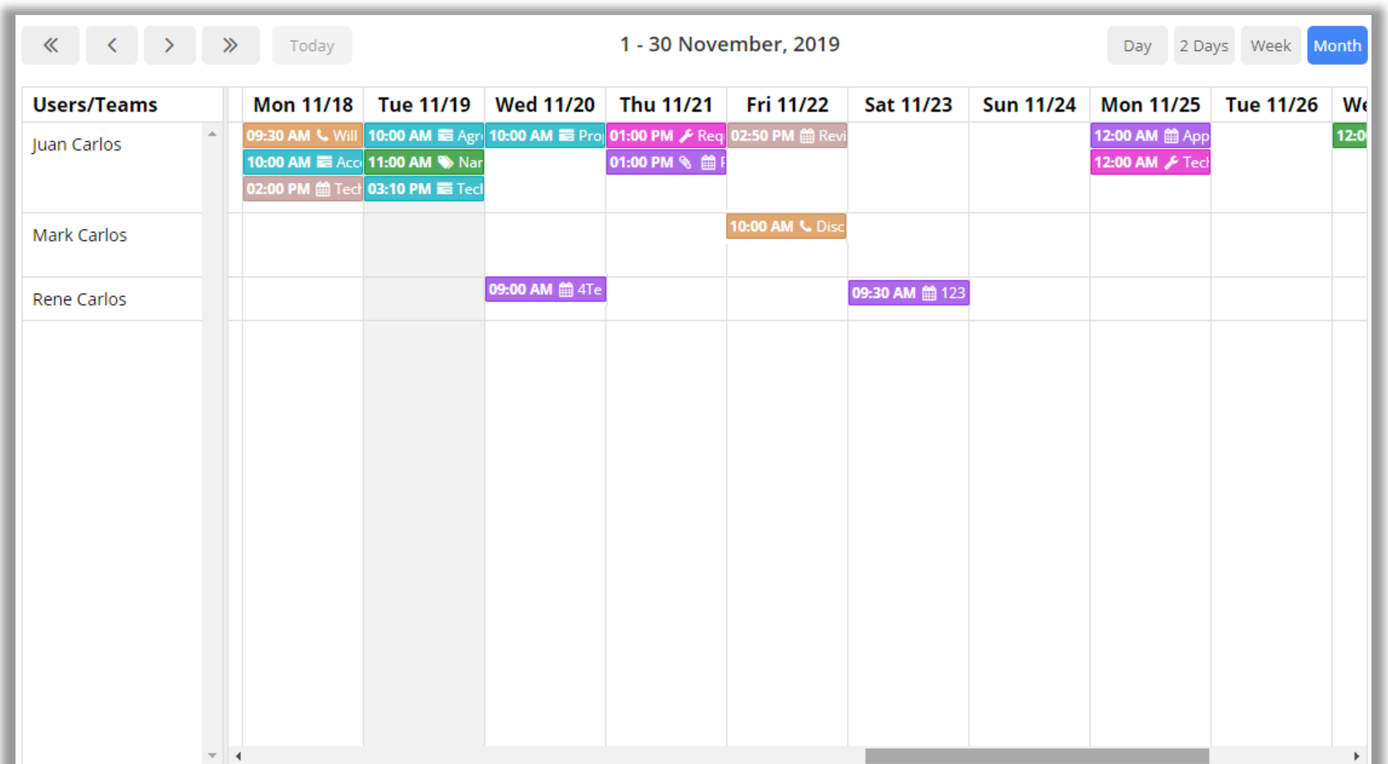
Week View:

- You can see the activities for the week in the Gantt View.



Month View:

- You can see the activities for the month in the Gantt View.

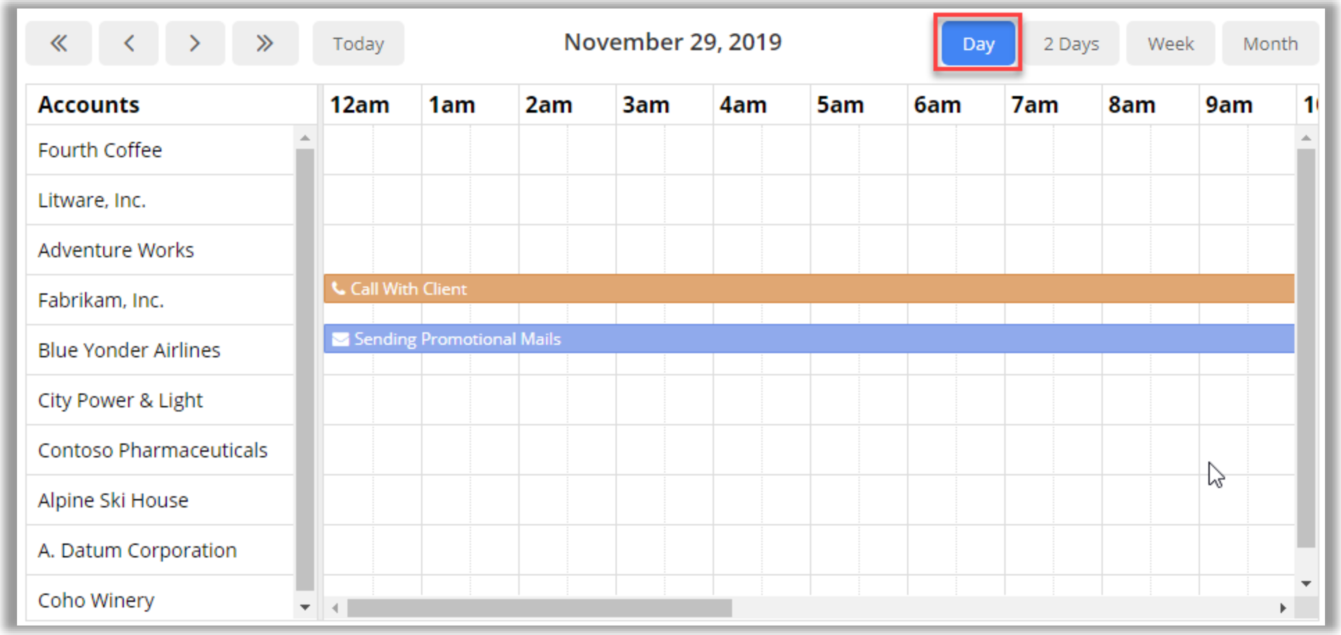


Timeline View

- This view provides you a Timeline view of the calendar in which you can view the simple sequential overview of the calendar- separated by day and the selection of the Users/Teams & Facility/Equipment in Resource Calendar and Accounts, Contacts in Customer Calendar.
- In addition, you can view the calendar in Timeline View as per the Day, Week or Month format.

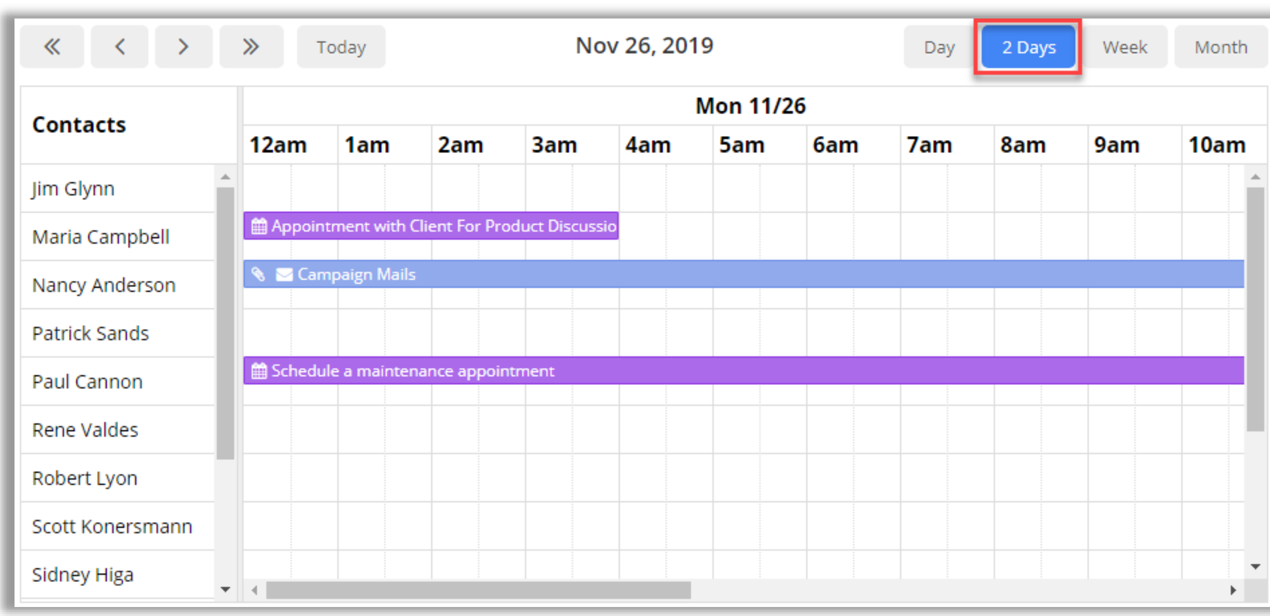
Day View:

- You can see the activities for the day in the Timeline view.



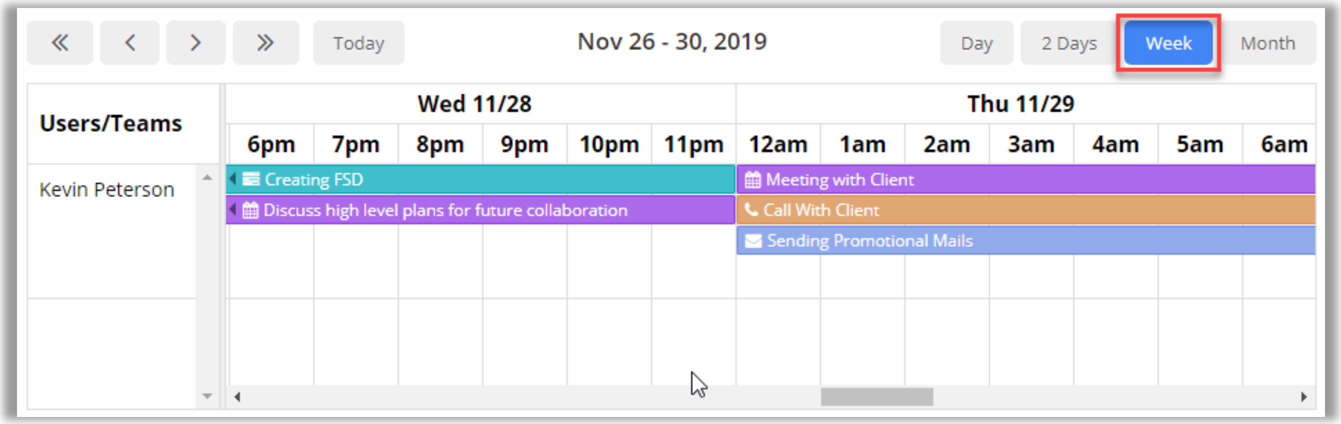
Day Span View

- You can view the calendar as per the configured number of days from Default Configurations in Day Span View.



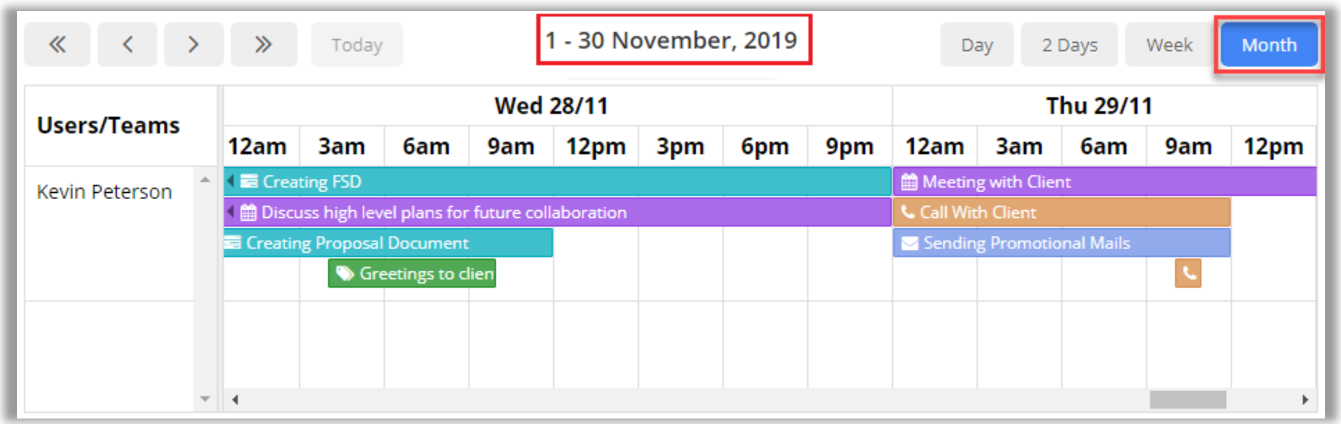
Week View:

- You can see the activities for the week in the Timeline view.



Month View:

- You can see the activities for the month in the Timeline view.

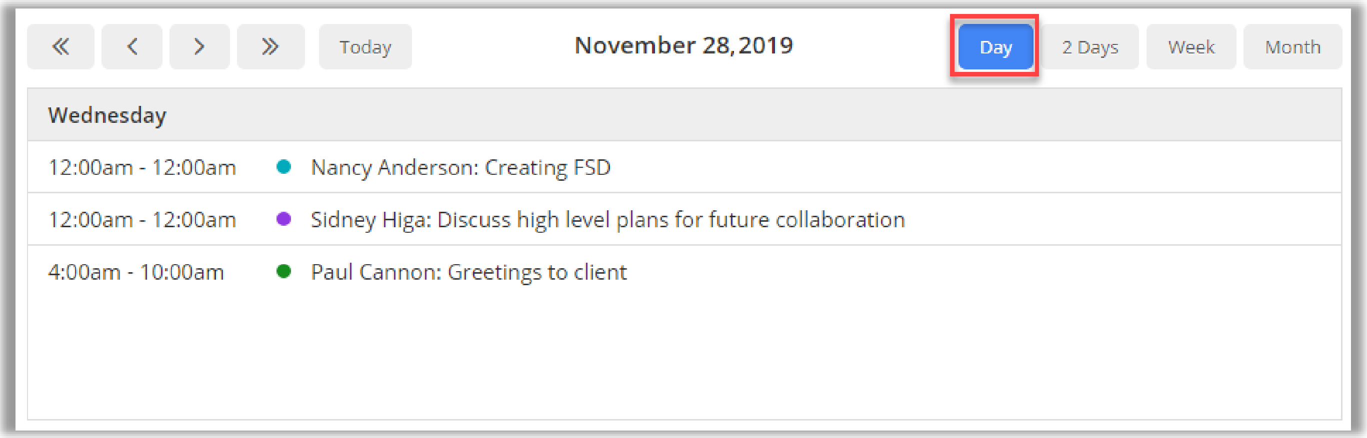


Agenda View

- This view provides you an Agenda view of the calendar in which you can view a **sequential list view** with **grouping** options for other resources like accounts, contacts, facilities/equipment or users/teams or by date as per the requirements.
- In addition, you can view the calendar in Timeline View as per the Day, Week or Month format.

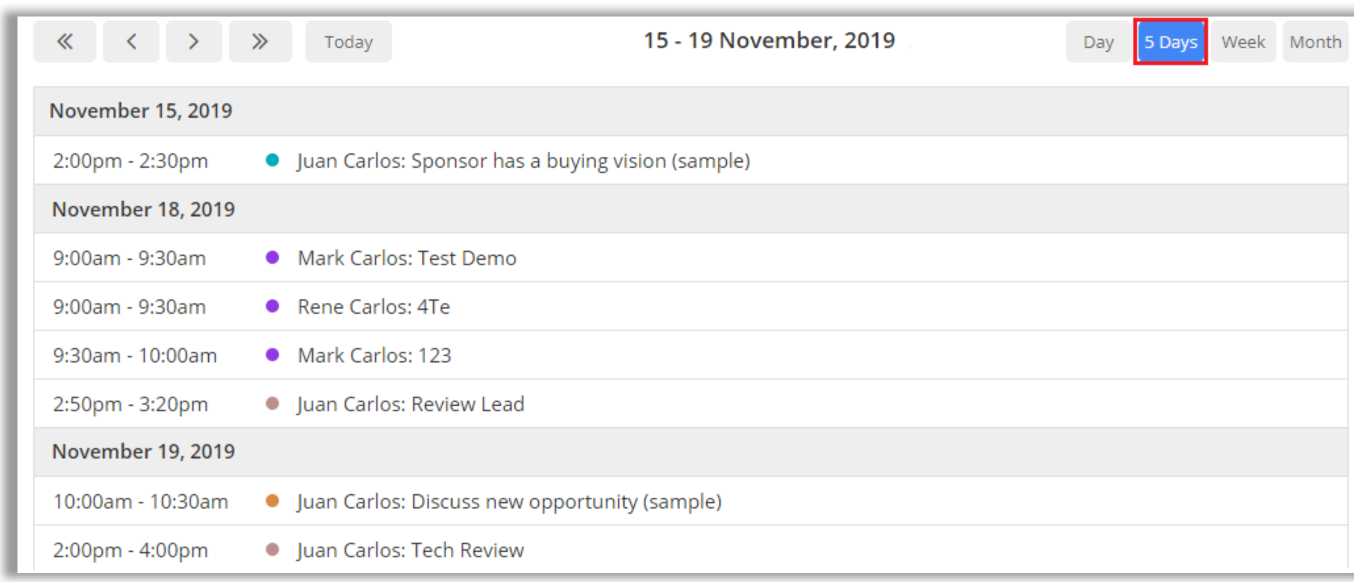
Day View:

- You can see the activities for the day in the agenda view.



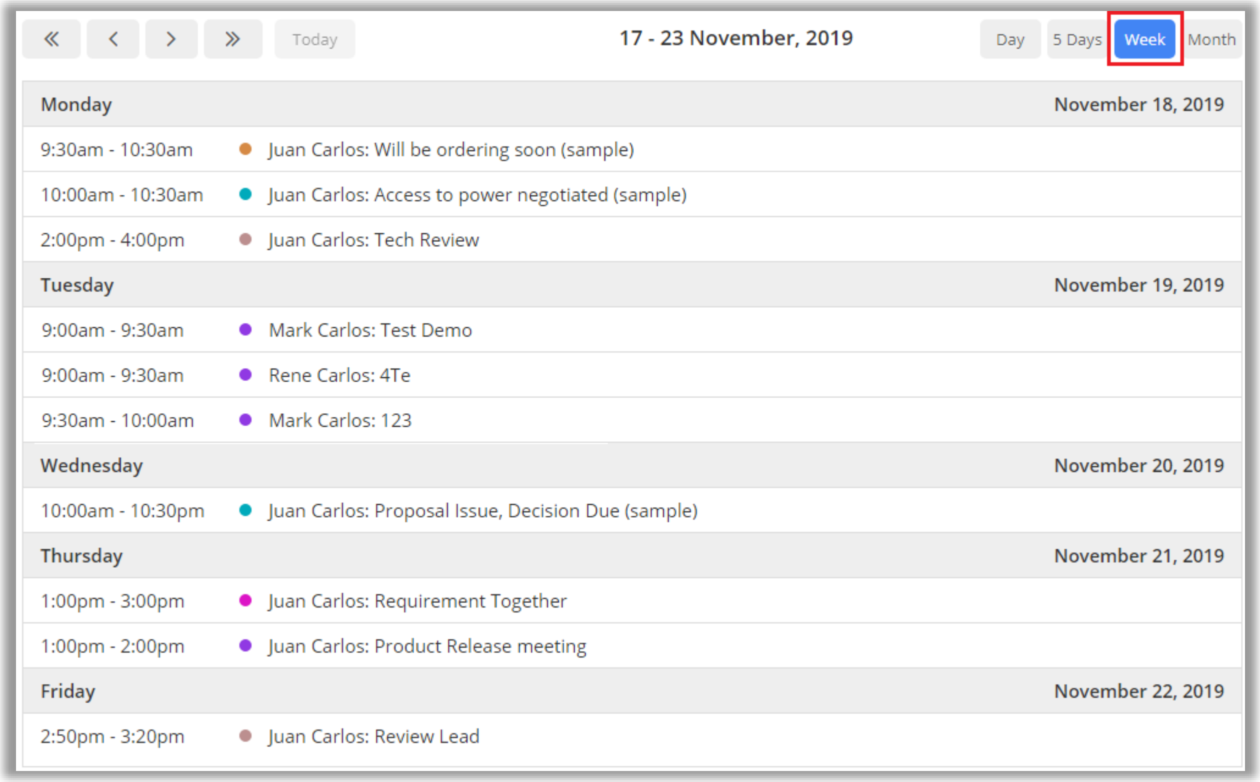
Day Span View:

- You can view the calendar as per the configured number of days from Default Configurations in Agenda View.



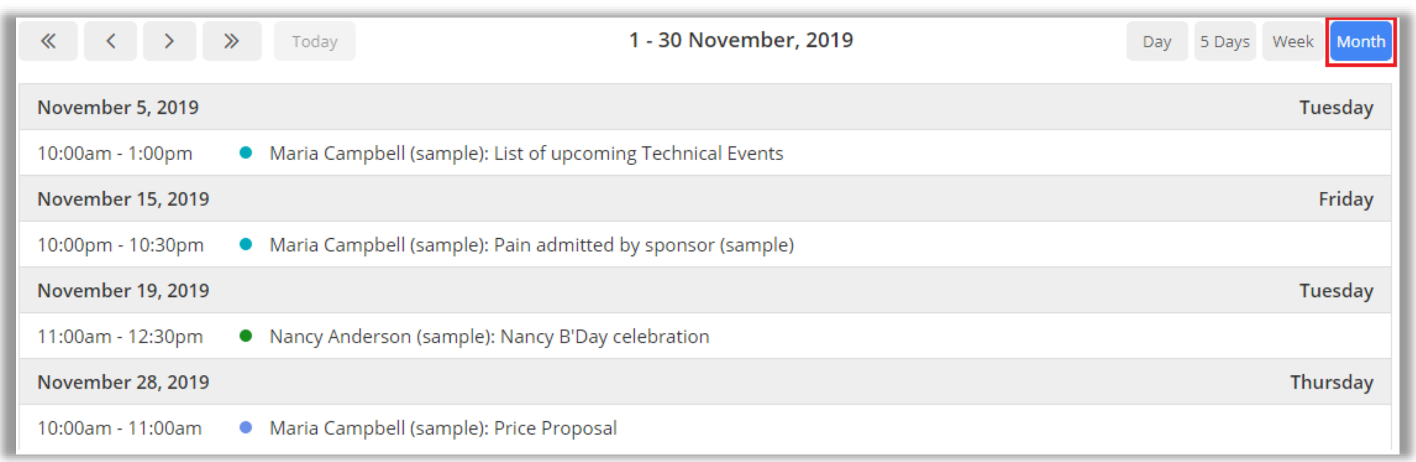
Week View:

- You can also see the activities for the week in the agenda view.



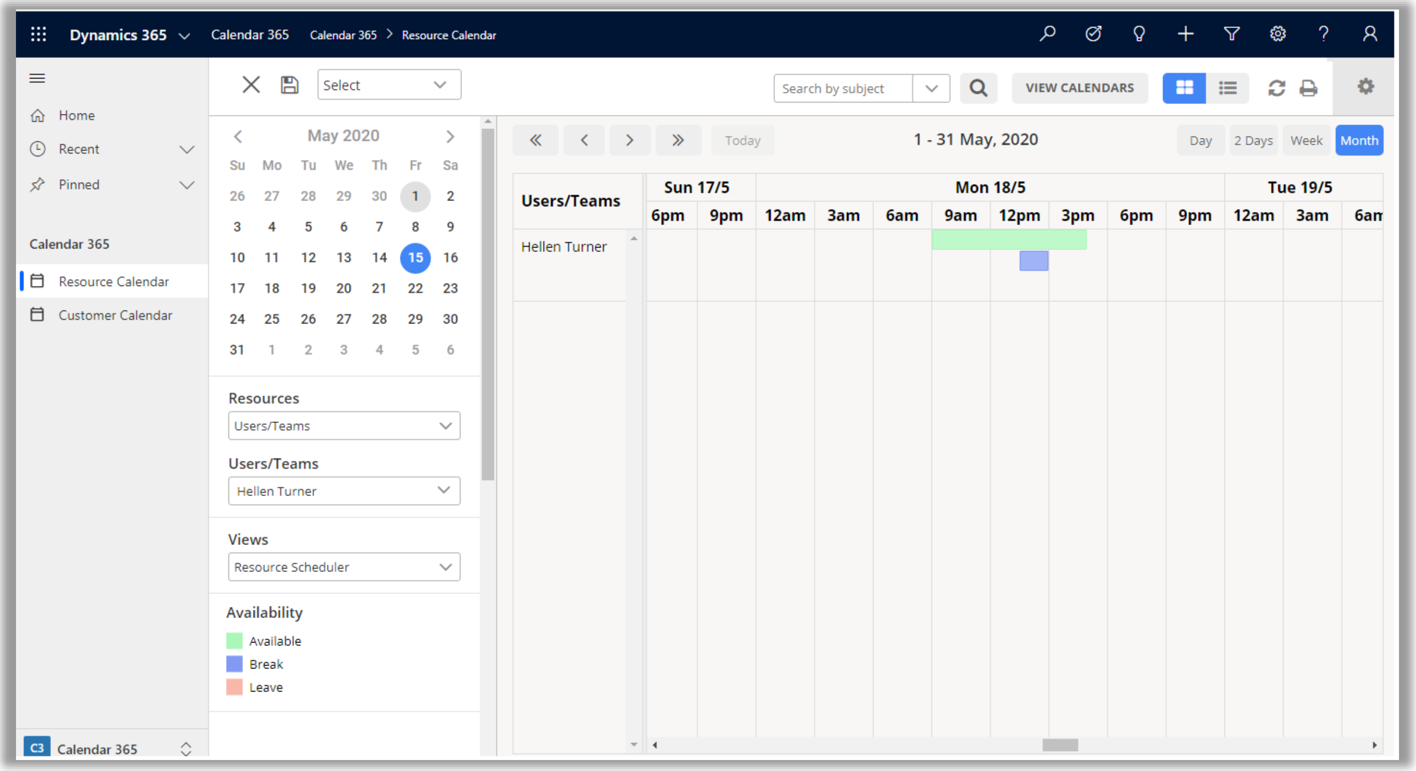
Month View:

- You can also see the activities for the month in the agenda view.



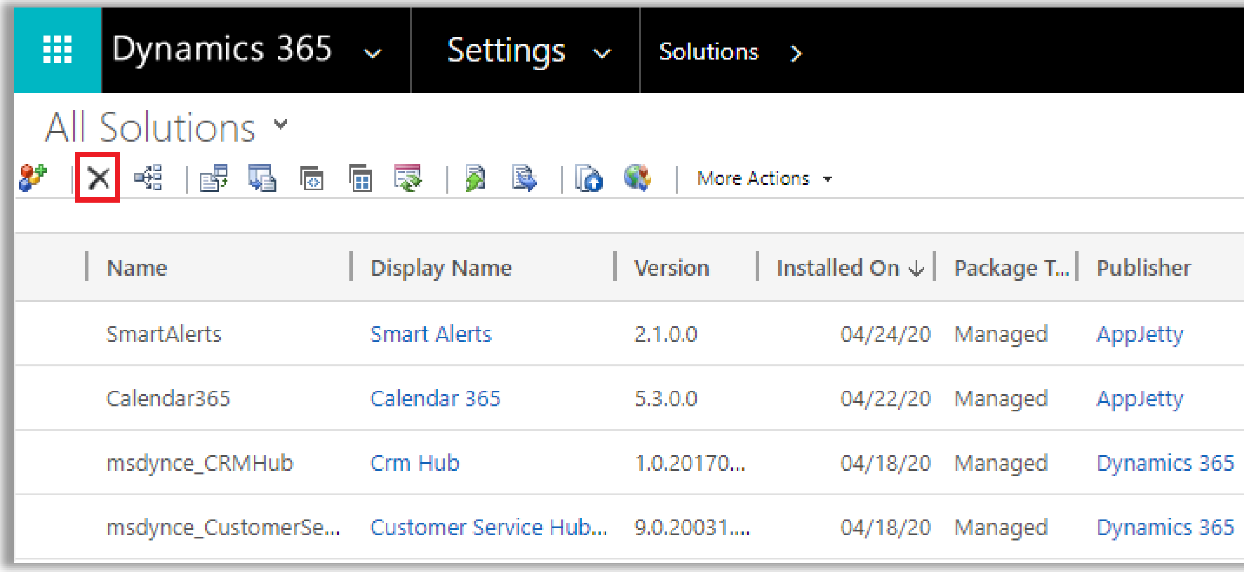
Resource Scheduler

- “Resource Scheduler” option is only visible if you have enabled from the Settings. You can create the Work Schedule for the resources (users) and based on the available hours, you can assign the task.

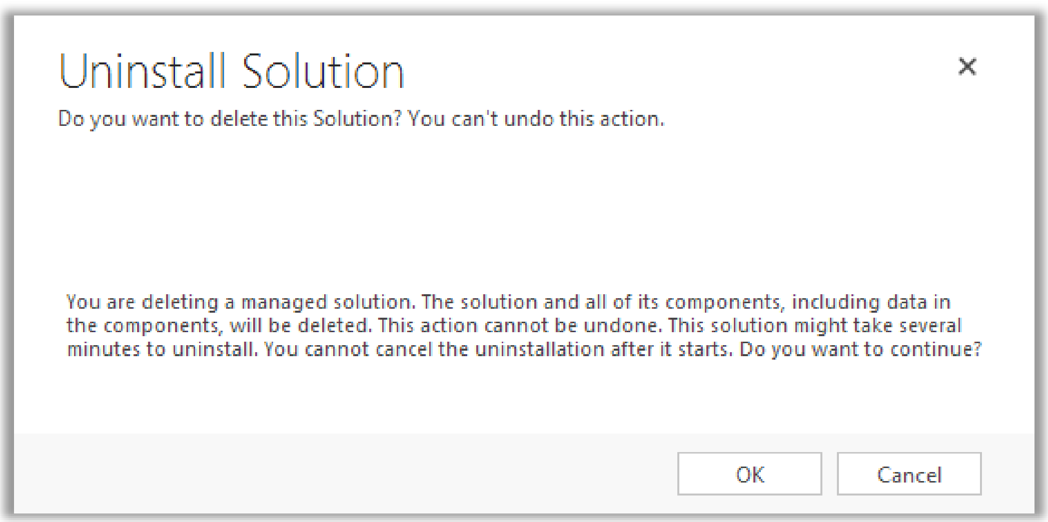


Un-installation Steps

- To uninstall the Solution, go to **Settings - > Solutions**.
- Check on the Plug-In Name and click on **'Delete'**.



- Click on **'OK'** to Delete and uninstall the solution from CRM.



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We simplify your business, offer unique business solution in digital web and IT landscapes.

Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: https://www.appjetty.com/dynamicscrm-all-in-one-calendar.htmand click on the Live Chat button for instant support.

Tickets

- Raise tickets for your specific question!
- Send an email to support@appjetty.com or you can login to my account www.appjetty.com and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

Customization:
If you would like to customize or discuss about additional feature for **Calendar 365**, please write to sales@appjetty.com