

USER MANUAL



Calendar 365: “Installation & Configuration”

Version: 5.4

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.

Pre-requisites

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

New changes V5.4

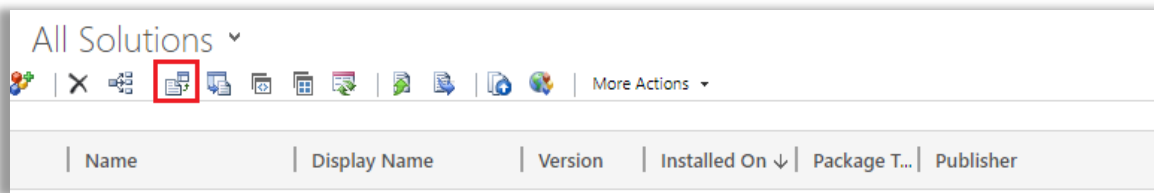
As per the version **5.4** of **Calendar 365**, the following topics are updated or newly added:

- Owner Color Configuration: Color configuration for the individual CRM users
- Business Unit: By enabling this option, display and manage the activities for the “Business Unit” on the Calendar 365.
- Minimum/Maximum Time Slot: Select the time slots to display the slot duration or working duration on the Calendar.
- All Day Event: Enable the All Day event for Appointment activity

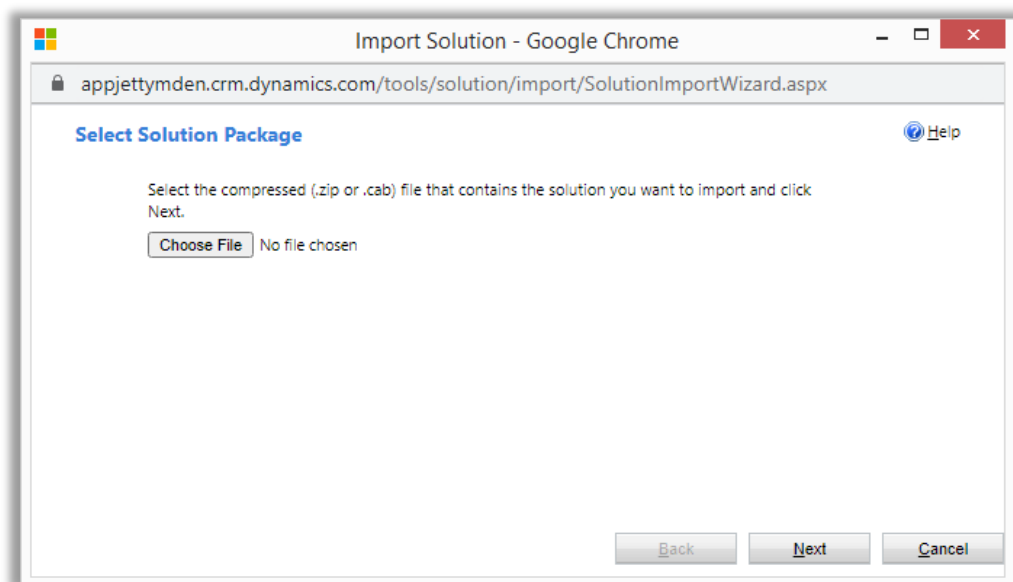
Installation

Installation Steps

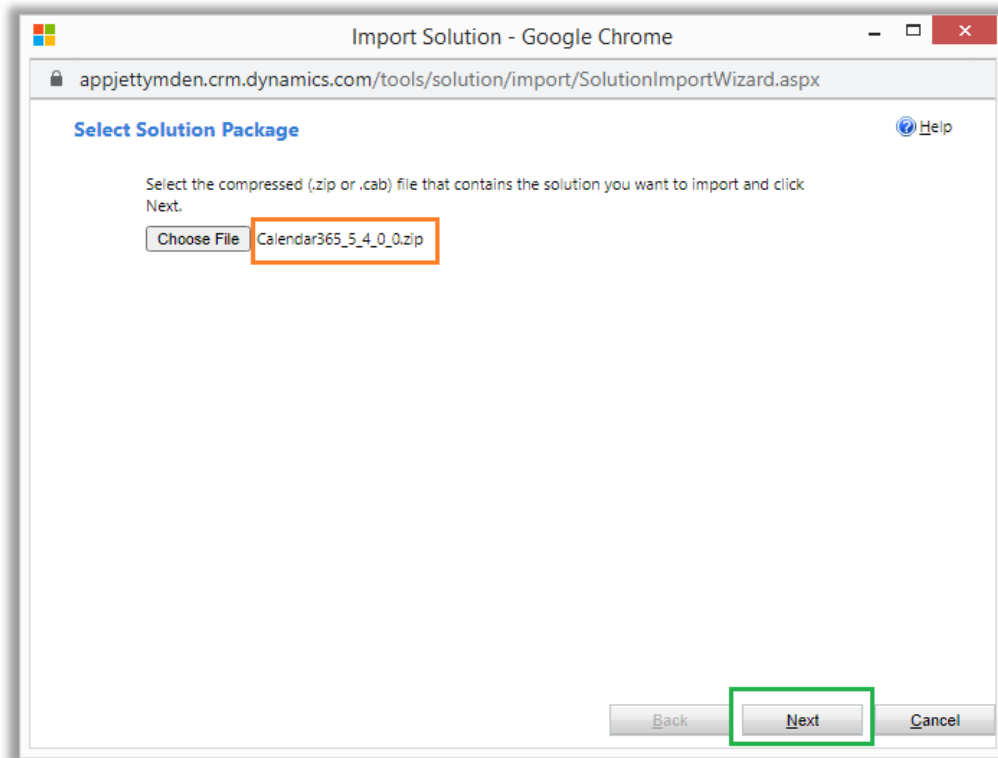
- To install the “Calendar 365” plugin, the following steps are to be followed
 - On purchasing the plugin, you will get a zip file named **Calendar365_v5.4.zip**
 - Login into your CRM Account and click on **Settings → Solutions**.
 - Click on **‘Import’** to upload and install the Solution.



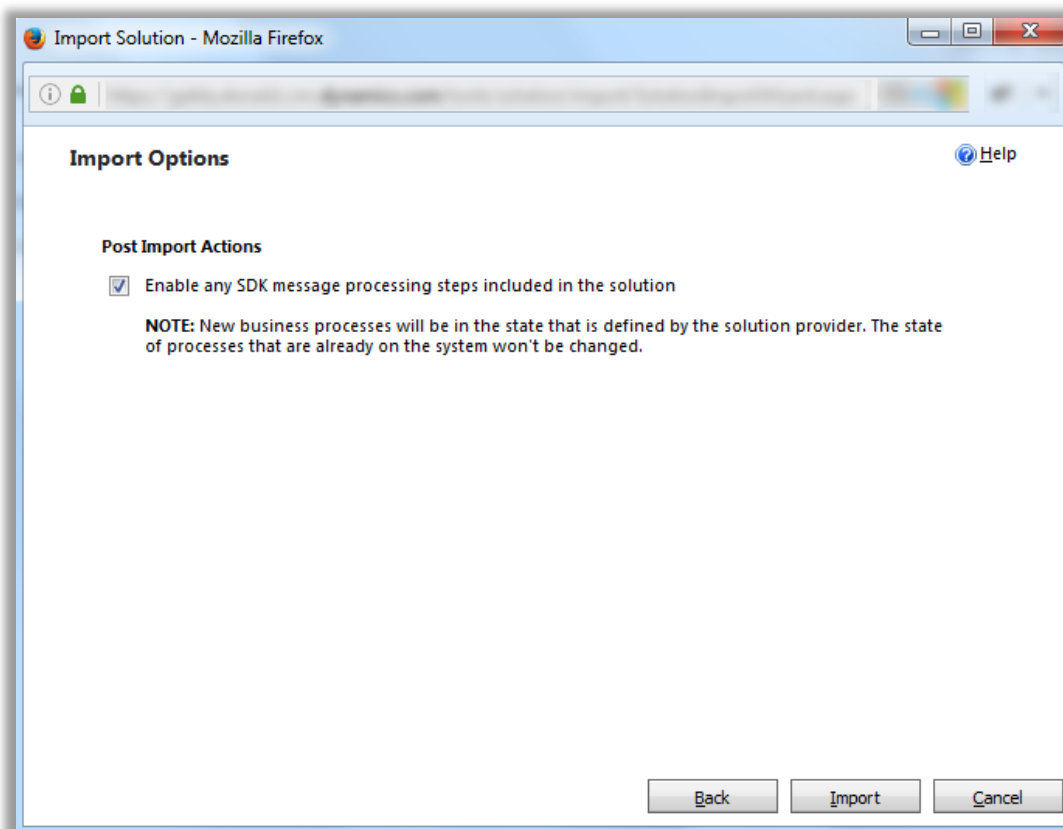
- Click on **Choose File** button and choose the Package Zip File for Calendar 365 from the “Import Solution” Window.



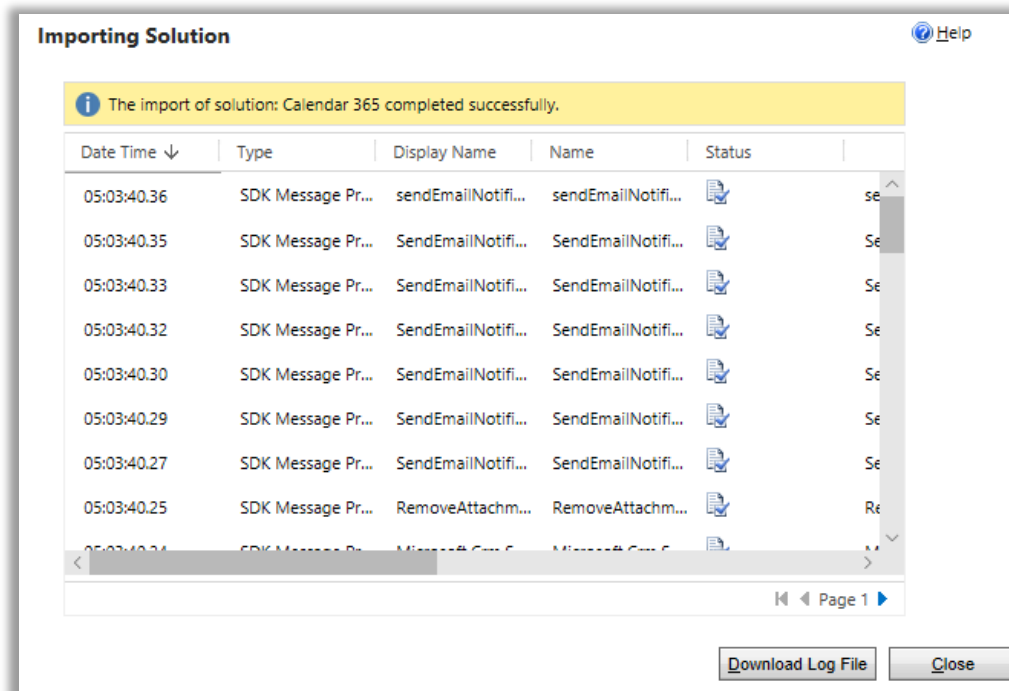
- After selecting the Zip file, click on **Next** for further processing.



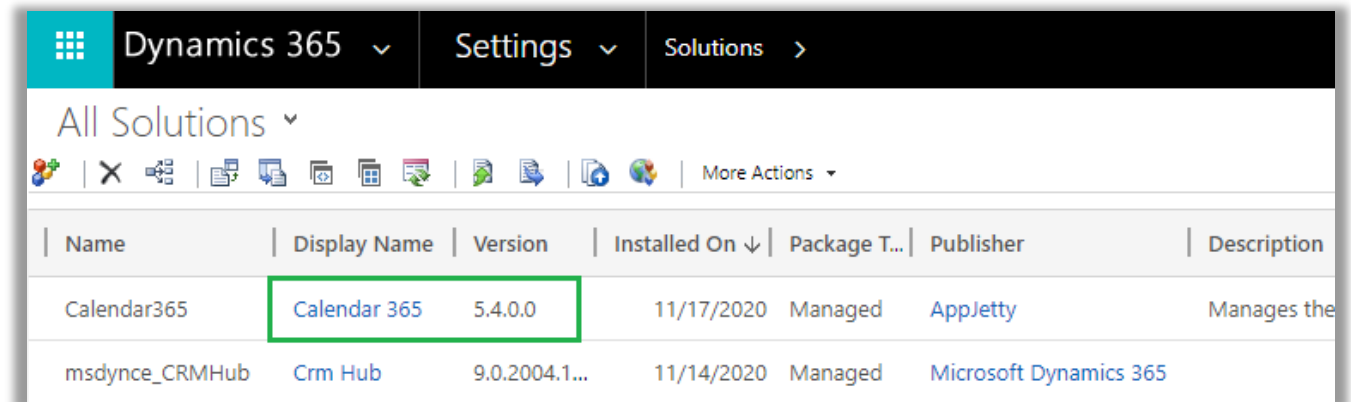
- Check the box to enable any SDK message processing steps included in the solution and click on 'Import' button to Import the Solution.



- It opens the new window that shows the process of importing solution.

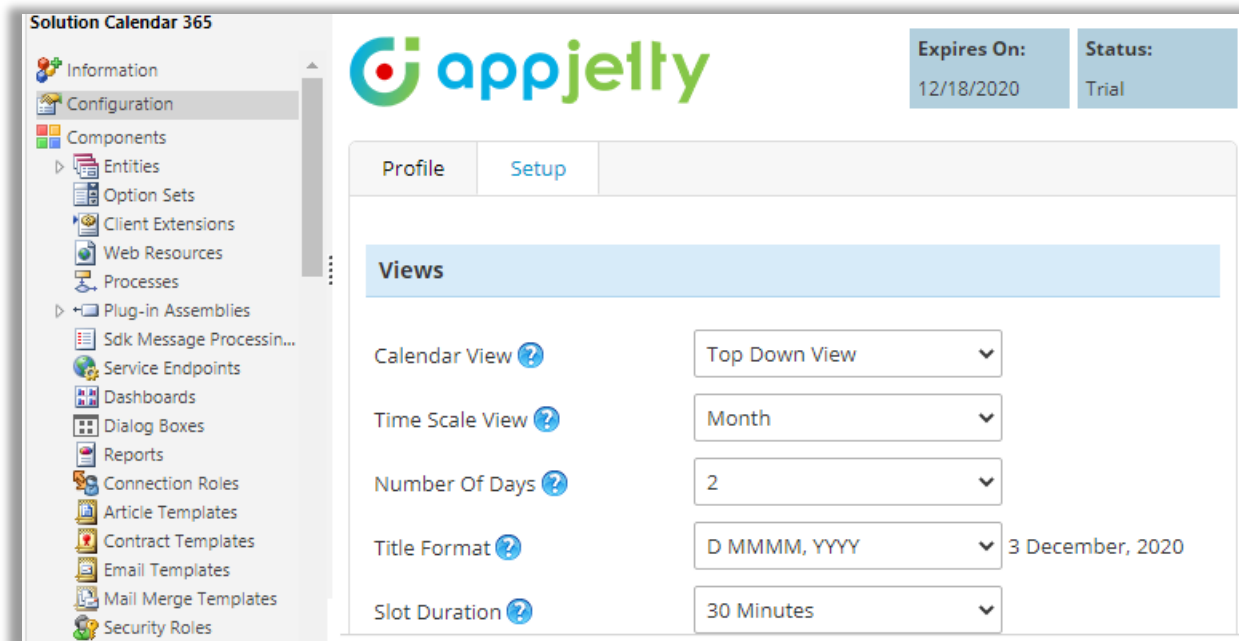


- Click on **Close** button after successful completion message is displayed.
- Once you import the solution, it will be displayed in the solutions grid view.

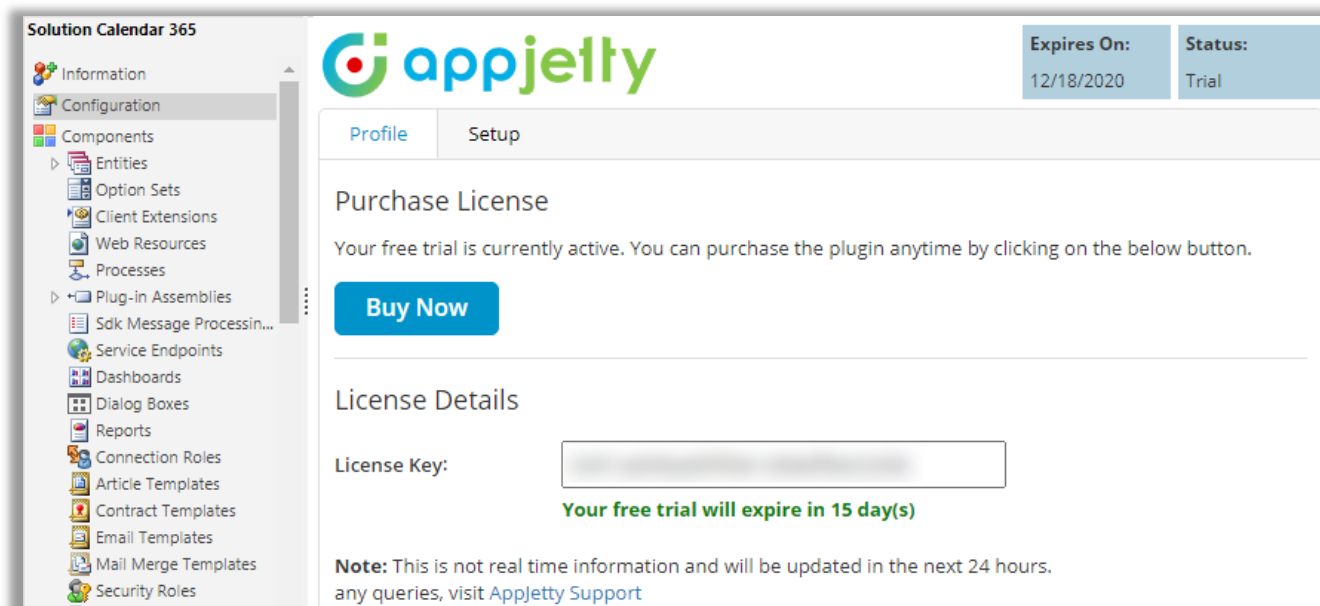


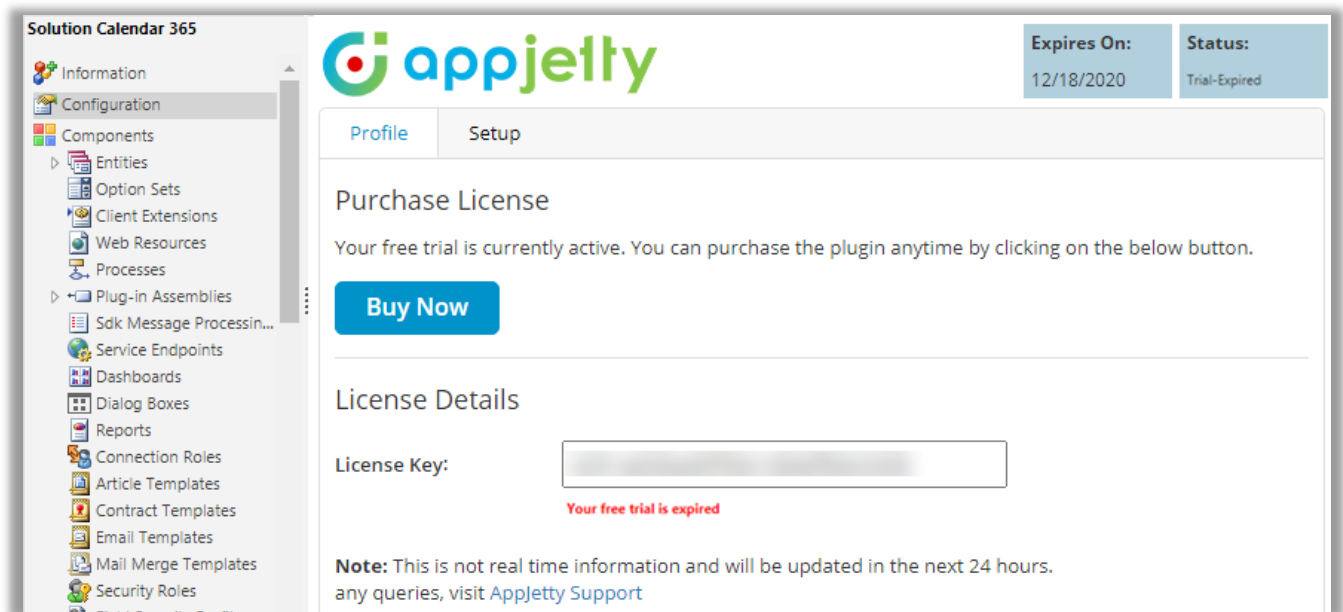
Free Trial and Activation

- 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.

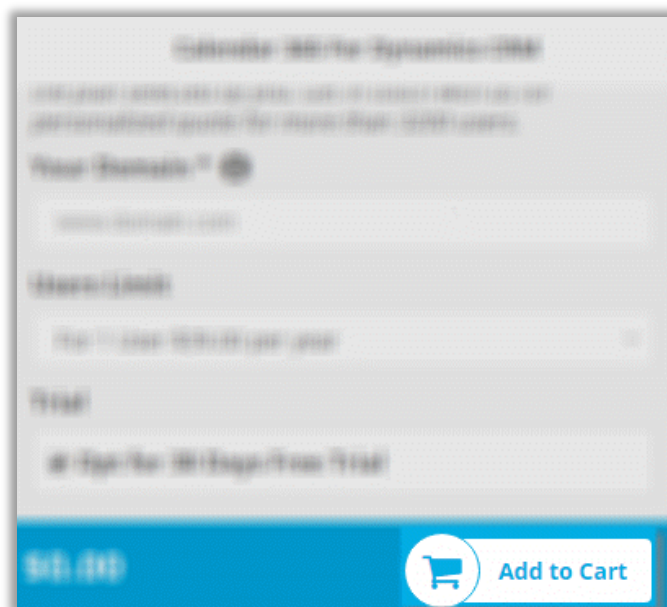


- You can activate your one-month free trial.
- To get a one-month free trial license key fill out the details and click on ‘ACTIVATE’ button.
- Your trial will activate, and expiry date will be displayed on top.
- You can purchase the licensed version any time. To purchase the license, click on ‘Buy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

- After inserting the ‘License Key’, your Calendar 365 will be activated.
- Under the License Details, You can manage the Users as well.

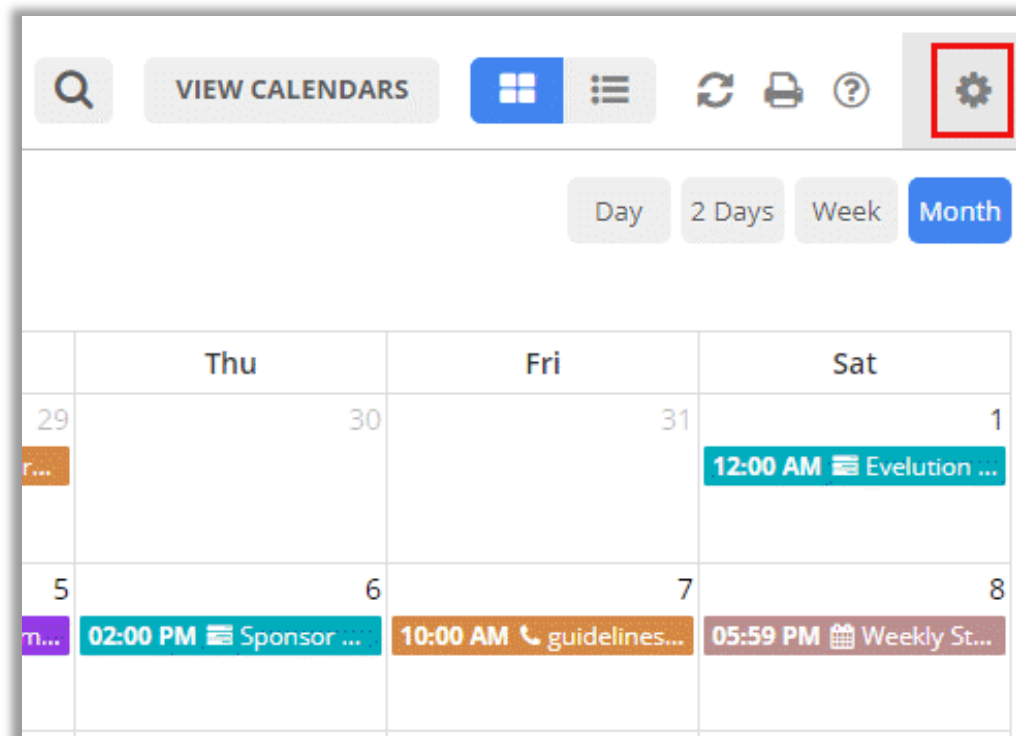
The screenshot displays the 'Setup' tab of the AppJetty configuration window. It is divided into two main sections: 'License Details' and 'Manage Users'.

License Details: This section contains a 'License Key' input field. Below it, a green message states: "The plugin has been activated and your next payment cycle will be initiated on 7/14/2021". A link to "AppJetty Support" is provided for any queries.

Manage Users: This section shows the current user allocation. It indicates "Total allowed license user: 1" and "Remaining license user: 4". There are two list boxes with arrows between them to move users. The left list box contains: "Delegated Admin", "INTEGRATION", "Support User", "SYSTEM", and "Mark Smith". The right list box contains: "Yenki Tech". A blue "Save" button is located at the bottom left of this section.

Calendar 365 Default Configuration

- To configure the **Calendar 365** settings, click on the 'Gear'  icon available on the Calendar main page.



- You can manage **Default Configuration** settings from here for:
 - Views
 - Activities
 - Owner Color
 - Business Unit
 - Unscheduled Activities
 - Conflict Management
 - Notification
 - Holidays
 - Locations
 - Upcoming Events

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

Views Configuration

- Configure the default view of the calendar under the **'Views'** section. By configuring the individual setups/options, you can define the view of the Calendar.

Views	
Calendar View ?	Top Down View ▼
Time Scale View ?	Month ▼
Number Of Days ?	2 ▼
Title Format ?	D MMMM, YYYY ▼ 3 December, 2020
Slot Duration ?	30 Minutes ▼
Minimum Duration ?	00 ▼
Maximum Duration ?	24 ▼
Default Regarding ?	Contact ▼
Shared Calendar ?	Yes ▼
Overdue Activities ?	No ▼
Contact Calendar ?	None selected ▼
Account Calendar ?	None selected ▼

Calendar View:

Calendar View ?	Top Down View ▼
Time Scale View ?	Top Down View
	Gantt View
	TimeLine View
Number Of Days ?	Agenda 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.

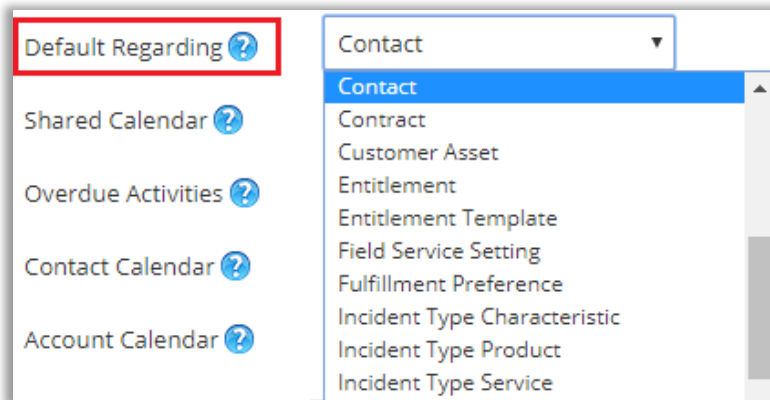
▪ **Slot Duration:**

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

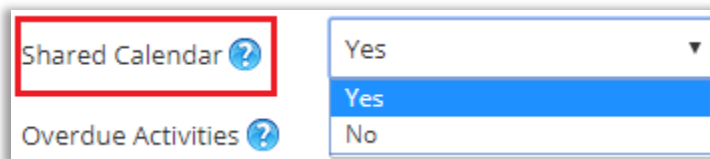
- **Minimum/Maximum Duration:** You can set the minimum/maximum time for the Calendar Time block in the Day / Week view. You can define the duration of availability or Working Timings default.

By default, for Minimum value is 00:00 and Maximum value is 24:00 . You can insert the availability hours of the day here.

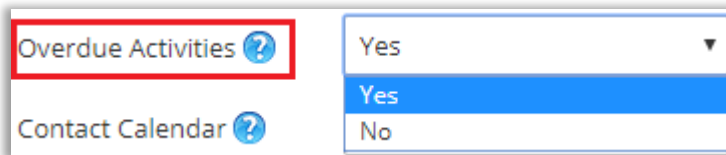
- **Default Regarding:** You can set default 'Lookup Record' entity.



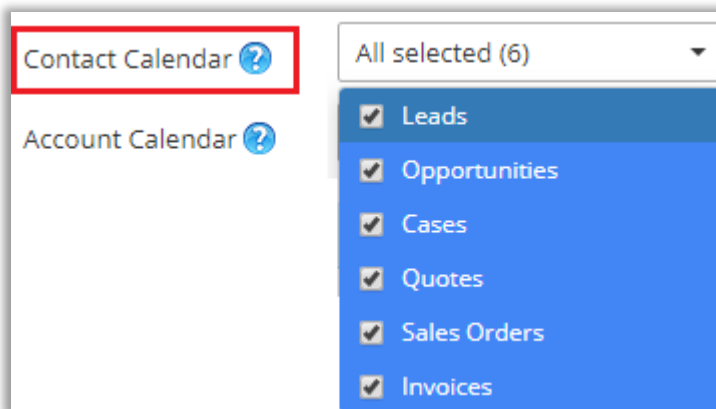
- **Shared Calendar:** If you want to share calendar to another Admin User, select 'Yes'.



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

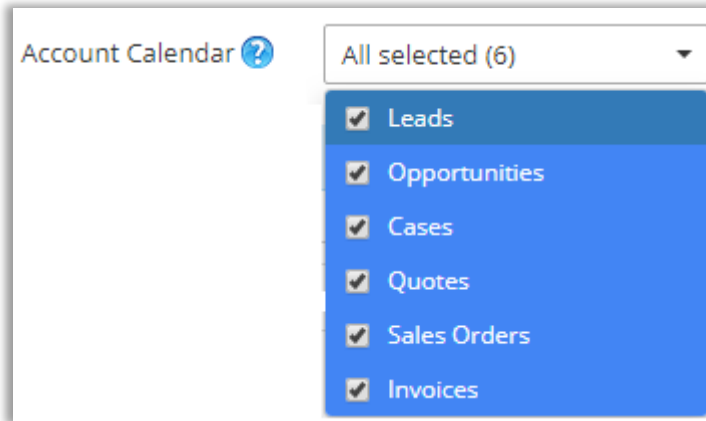


- **Contact Calendar:**



- 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, Bookable Resource Booking 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.

The screenshot shows the 'Activities' configuration interface. At the top, there are tabs for different activity types: Task, Fax, Phone Call, Email, Letter, Appointment, Recurring Appointment, Service Activity, Campaign Activity, Bookable Resource Booking, and Custom Activity. The 'Task' tab is currently active. Below the tabs, the configuration fields for 'Task' are displayed. The 'Task' checkbox is checked. The 'Default Color' is set to #00aabb. The 'Overwrite Color By' dropdown is set to 'By Status', and its dropdown menu is open, showing options: None, By Status (highlighted), and By Priority. Below this, there are two status color configurations: 'Completed' with color #e30d8b and 'Canceled' with color #e83a00. Other fields include 'Tooltip Attribute' (5 selected), 'Details Attribute' (5 selected), 'Title Attribute' (Subject), 'Email Reminder' (Off), 'Minutes' (0), and 'Buttons Configuration' (Convert To Opportunity, Convert To Case, Mark As Complete, Mark As Cancel).

- 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.

Tooltip Attribute ? 5 selected

- ☒ Owner
- ☐ Owing Business Unit
- ☐ Owing Team
- ☐ Owing User
- ☐ Percent Complete
- ☒ Priority
- ☐ Record Created On
- ☒ Regarding

Details Attribute ? 5 selected

- ☐ Owing Business Unit
- ☐ Owing Team
- ☐ Owing User
- ☐ Percent Complete
- ☐ Record Created On

Title Attribute ? Subject

Email Reminder ?

Minutes ?

Buttons Configuration ?

- 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.

Tooltip Attribute ? 5 selected

Details Attribute ? 5 selected

Title Attribute ? Subject

Email Reminder ?

Minutes ?

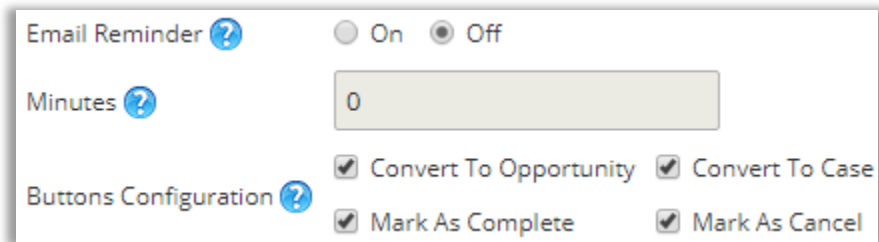
Buttons Configuration ?

- **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.



The screenshot shows a configuration window with the following elements:

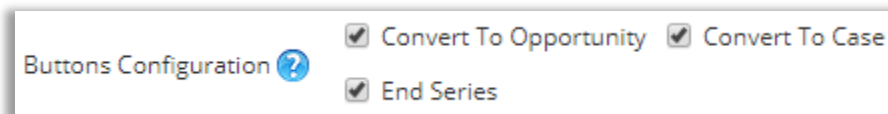
- Email Reminder:** A label with a question mark icon, followed by two radio buttons: 'On' (unselected) and 'Off' (selected).
- Minutes:** A label with a question mark icon, followed by a text input field containing the value '0'.
- Buttons Configuration:** A label with a question mark icon, followed by four checkboxes, all of which are checked:
 - Convert To Opportunity
 - Convert To Case
 - Mark As Complete
 - Mark As Cancel

- **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

Note: All the following activities have different action button to perform. You will get the Buttons Configuration as per the configuring the specific activity.

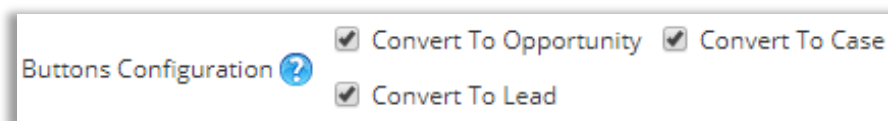
Recurring Appointment: 'Recurring Appointment' activity has **End Series** button in additional.



The screenshot shows a configuration window with the following elements:

- Buttons Configuration:** A label with a question mark icon, followed by three checkboxes, all of which are checked:
 - Convert To Opportunity
 - Convert To Case
 - End Series

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



The screenshot shows a configuration window with the following elements:

- Buttons Configuration:** A label with a question mark icon, followed by three checkboxes, all of which are checked:
 - Convert To Opportunity
 - Convert To Case
 - Convert To Lead

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

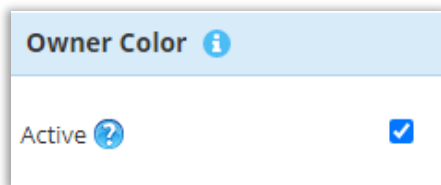


The screenshot shows a configuration window with the following elements:

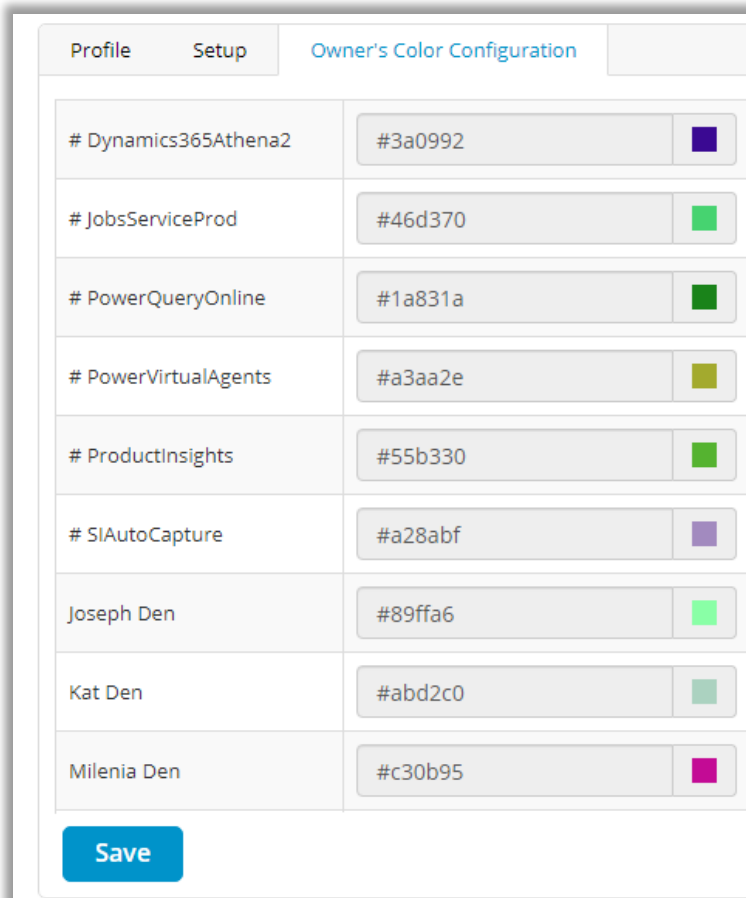
- Buttons Configuration:** A label with a question mark icon, followed by one checked checkbox:
 - Close Campaign Activity

Owner Color

- To define the color of the activities based on owner that is CRM users. By enabling this option, you can differentiate the user wise activities in different color on the calendar.



- By 'selecting' the Owner **Active** checkbox, you will navigate to the **Owner's color Configuration**.



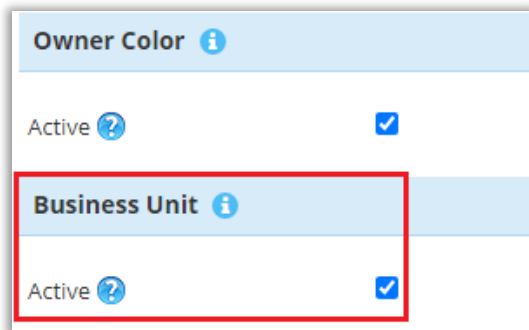
- You will get the list of the CRM Users. Using the 'Color picker', you can choose the color for the specific users.
- After selecting the color for the users, click on the **Save** button to save the configuration







Note: Owner wise color will appear only in Resource Calendar.

Business Unit

- By enabling the “Business Unit”, you can display the “Business Unit” resources of the default CRM under the ‘Resource’ tab of the Resource Calendar.



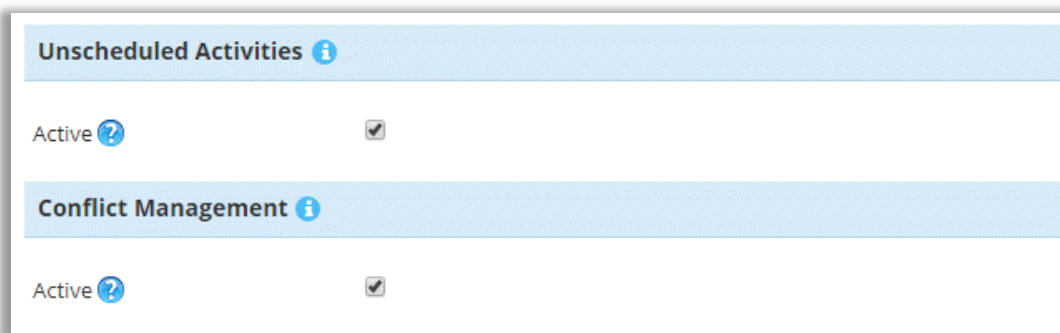
Owner Color 	
Active 	<input checked="" type="checkbox"/>
Business Unit 	
Active 	<input checked="" type="checkbox"/>





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

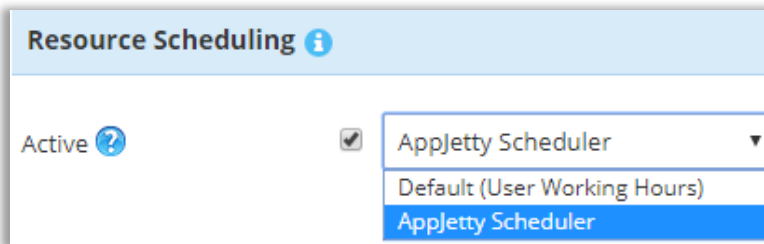
- To get alerts for conflicting activities based on time, check the Active box to enable **conflict management** in the calendar. On enabling conflict management, you get **alert message** when conflicts occur at the time of scheduling of appointments or service activities.



Unscheduled Activities 	
Active 	<input checked="" type="checkbox"/>
Conflict Management 	
Active 	<input checked="" type="checkbox"/>

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**.

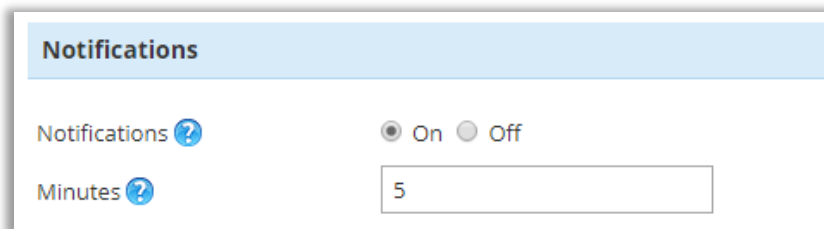


The screenshot shows the 'Resource Scheduling' configuration panel. It has a title bar with the text 'Resource Scheduling' and an information icon. Below the title bar, there is a section labeled 'Active' with a question mark icon. To the right of 'Active' is a checked checkbox. Further right is a dropdown menu currently showing 'AppJetty Scheduler'. The dropdown menu is open, showing three options: 'AppJetty Scheduler' (highlighted in blue), 'Default (User Working Hours)', and 'AppJetty Scheduler'.

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

Notifications

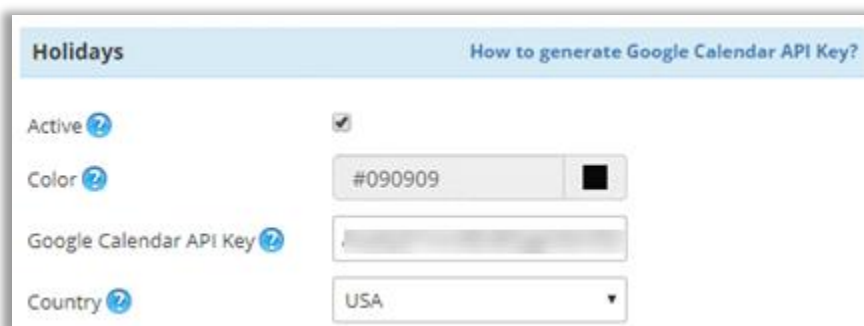
- To manage the notification reminder of the activities, navigate to the **‘Notifications’** section.
- You will get the notification reminder about upcoming activity when you are on Calendar page.



The screenshot shows the 'Notifications' configuration panel. It has a title bar with the text 'Notifications'. Below the title bar, there is a section labeled 'Notifications' with a question mark icon. To the right of 'Notifications' are two radio buttons: 'On' (selected) and 'Off'. Below this, there is a section labeled 'Minutes' with a question mark icon. To the right of 'Minutes' is a text input field containing the number '5'.

Holidays

- To manage the holidays, navigate to ‘Holidays’ section.



The screenshot shows the 'Holidays' configuration panel. It has a title bar with the text 'Holidays' and a link 'How to generate Google Calendar API Key?'. Below the title bar, there is a section labeled 'Active' with a question mark icon. To the right of 'Active' is a checked checkbox. Below this, there is a section labeled 'Color' with a question mark icon. To the right of 'Color' is a text input field containing '#090909' and a color swatch. Below this, there is a section labeled 'Google Calendar API Key' with a question mark icon. To the right of 'Google Calendar API Key' is a text input field. Below this, there is a section labeled 'Country' with a question mark icon. To the right of 'Country' is a dropdown menu showing 'USA'.

- 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.

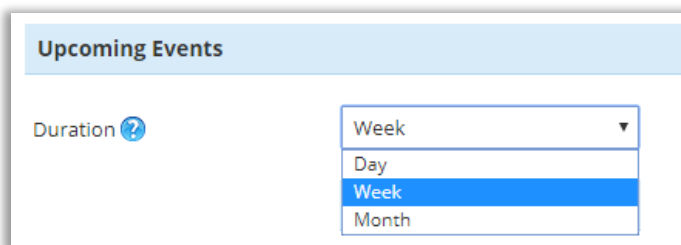


- If enabled, you need to enter Google Autocomplete API key that you have in order to get location suggestions.

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:



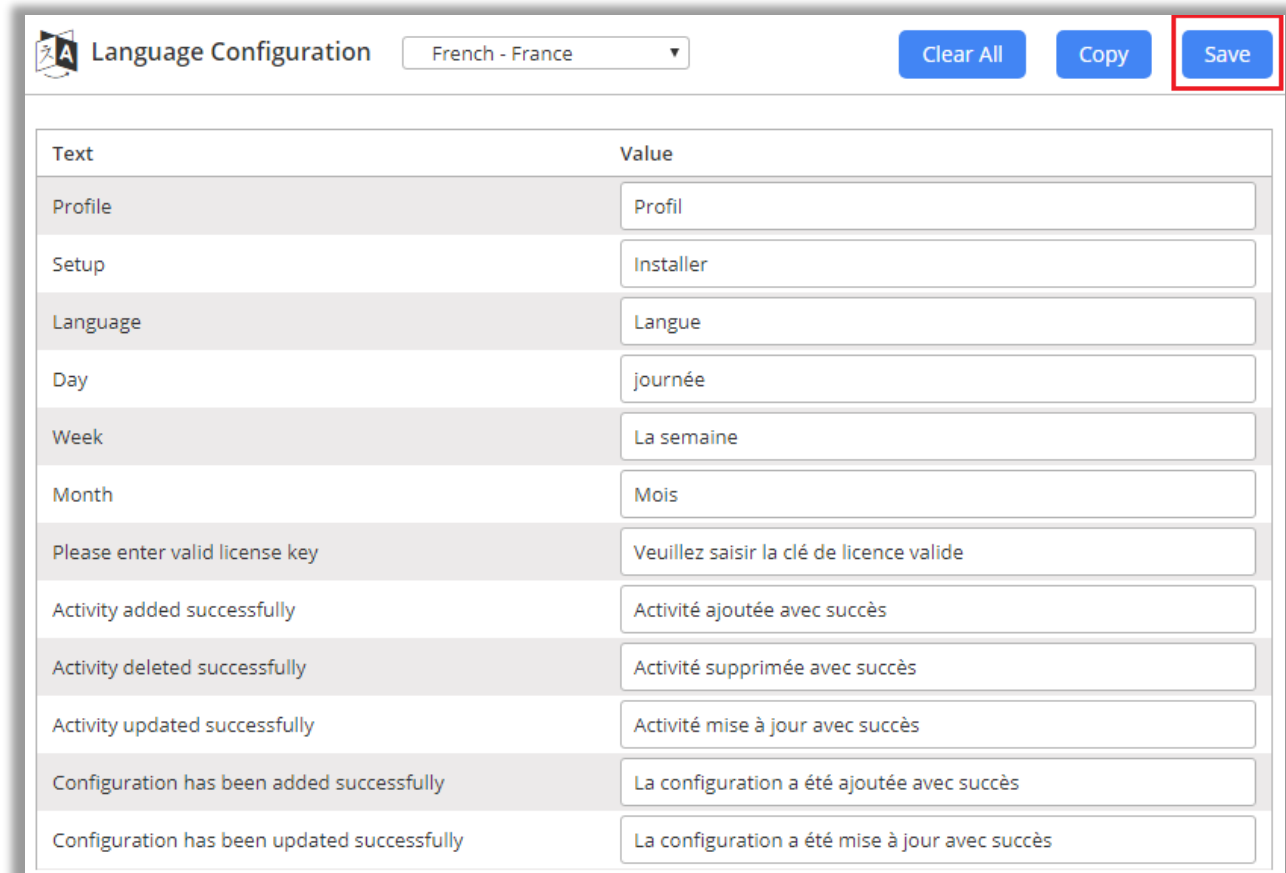
- **Duration:** You can select the any of the default view for '**Upcoming Events**' from the Day, Week or Month.



- **Save:** After configuring the Views, Activities & other relevant options, 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.



Text	Value
Profile	Profil
Setup	Installer
Language	Langue
Day	journée
Week	La semaine
Month	Mois
Please enter valid license key	Veuillez saisir la clé de licence valide
Activity added successfully	Activité ajoutée avec succès
Activity deleted successfully	Activité supprimée avec succès
Activity updated successfully	Activité mise à jour avec succès
Configuration has been added successfully	La configuration a été ajoutée avec succès
Configuration has been updated successfully	La configuration a été mise à jour avec succès

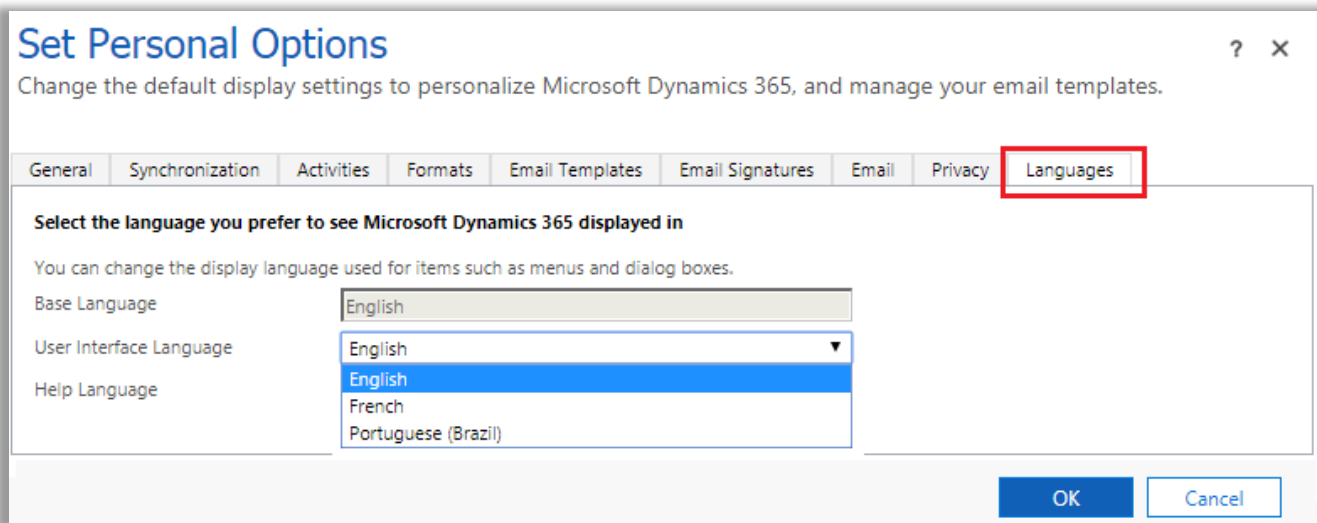
- Here, user needs to add translations themselves for the messages in the language of their choice.
- Click on save button to save the language translations.

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.

Other Configuration for Calendar 365

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.

The screenshot shows the 'Set Personal Options' dialog box with the 'Formats' tab selected. The 'Current Format' is set to 'English (United States)'. A 'Customize...' button is highlighted. Below, the 'Format Preview' section shows the following values:

Format Preview	Value
Number	123,456,789.00
Currency	\$123,456,789.00
Time	10:00 AM
Short Date	05/15/20
Long Date	Friday, May 15, 2020

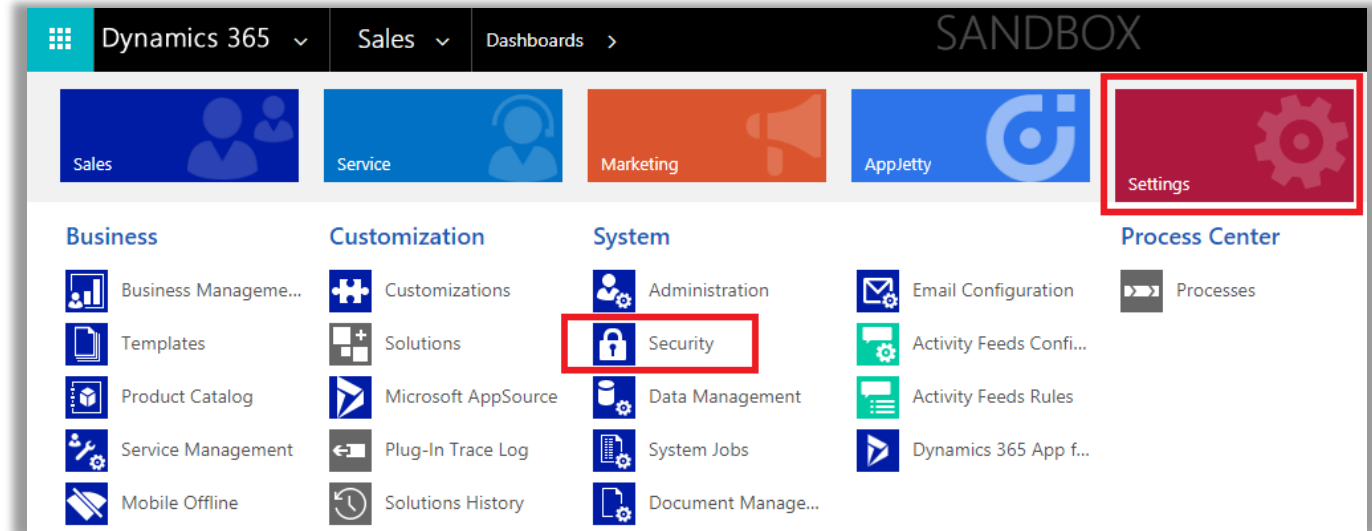
- Now click on the **Customize** button, the Customize Regional Options window will open.
- You can select the Date Format i.e. MM/DD/YY or DD/MM/YY and Separator.

The screenshot shows the 'Customize Regional Options' dialog box with the 'Date' tab selected. The 'Short Date' section shows 'Short Date Format' as 'MM/dd/yy', 'Date Separator' as '/', and 'Short Date Preview' as '05/15/20'. The 'Long Date' section shows 'Long Date Format' as 'dddd, MMMM d, yyyy' and 'Long Date Preview' as 'Friday, May 15, 2020'. Buttons for 'Reset', 'OK', 'Cancel', and 'Apply' are at the bottom.

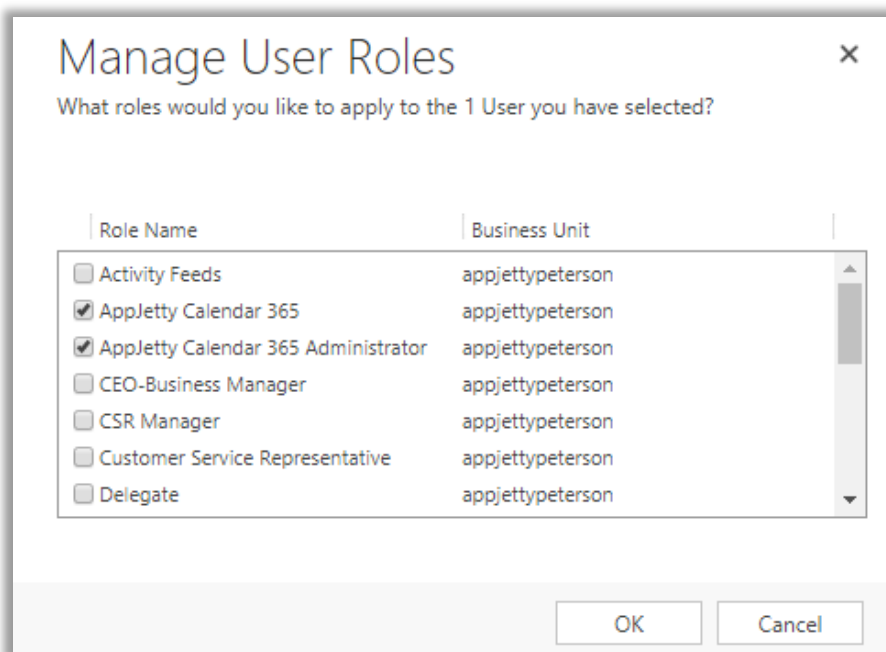
- Based on the format selection here, you will get the date format in date picker of Calendar365.

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.

Contact Us

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.htm> and 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