

USER MANUAL



Calendar 365

“Calendar View & Functionalities”

Version: 5.4

Compatibility:

Microsoft Dynamics CRM 2016(v8.0) and above (online and on-premises) and PowerApps

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

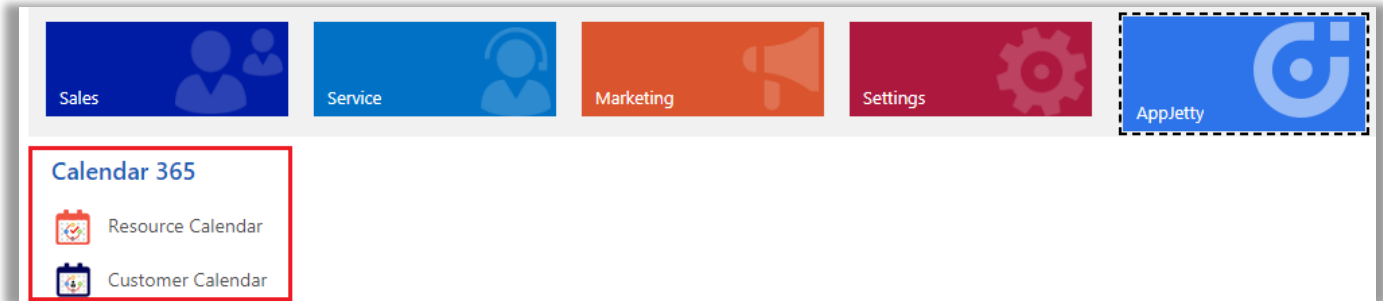
Calendar Management

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

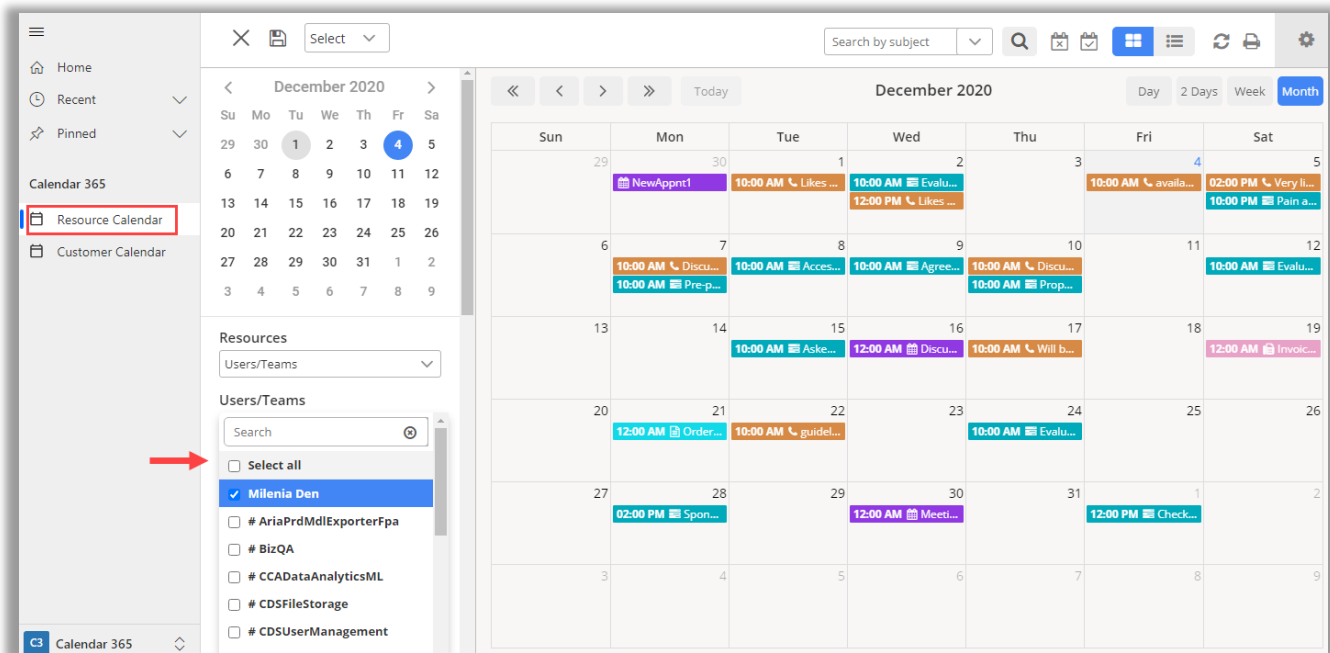
- Resources
 - Resource Calendar
 - Customer Calendar
 - Related Entities
- Activity Details
 - Tooltip view
 - Detail view
- Left side Panel
 - Activities
 - Status
 - Priority
 - Weekend & Holidays
 - Upcoming Events
- Refresh
- Save and Share Calendar Views
 - Update Calendar
 - Share Saved Calendar 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

Calendar 365

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



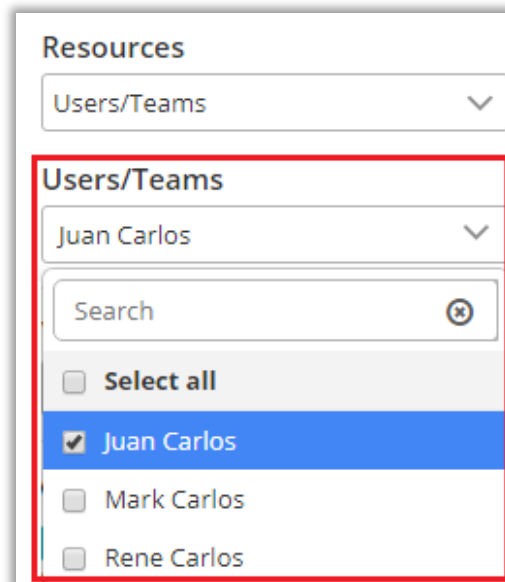
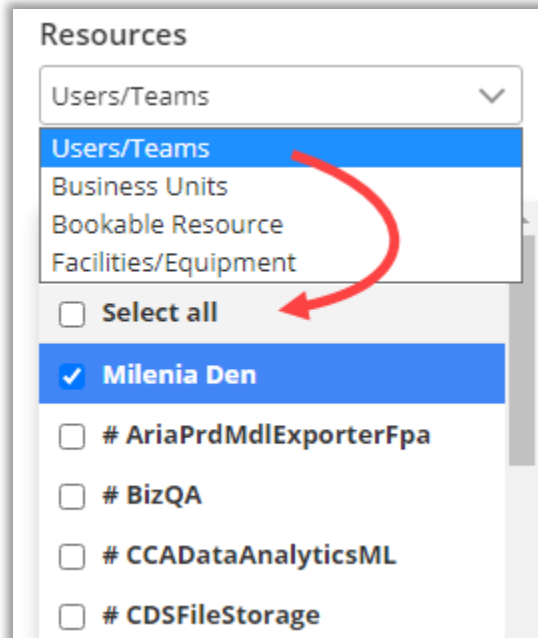
- Here, you get two calendars: **Resource Calendar** & **Customer Calendar**.
 - Resource Calendar: It is for **User** and **Facility/Equipment**.
 - Customer Calendar: It is for **Contacts** and **Accounts**.
- If you want to manage activities for the Users/Teams, Bookable Resource *or* Facilities/Equipment,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

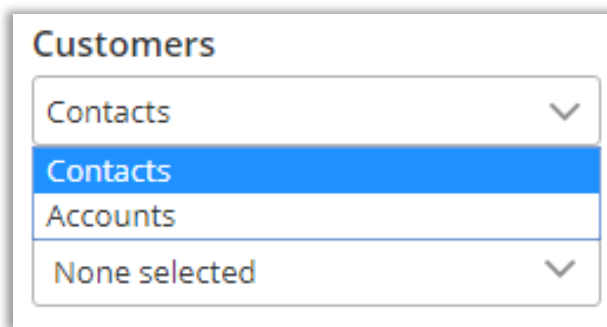
Resources

- 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 you have selected the **User/Teams** as “Resources”, the list will be displayed and you can enable/disable the Users/Teams by selection.
 - If **Business Unit** option is selected as “Resources”, it displays the business units of the organization like departments or divisions that have separate products, customers, and marketing lists.
 - If **Bookable Resource** option is selected as “Resources”, 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 “Resources”, 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.

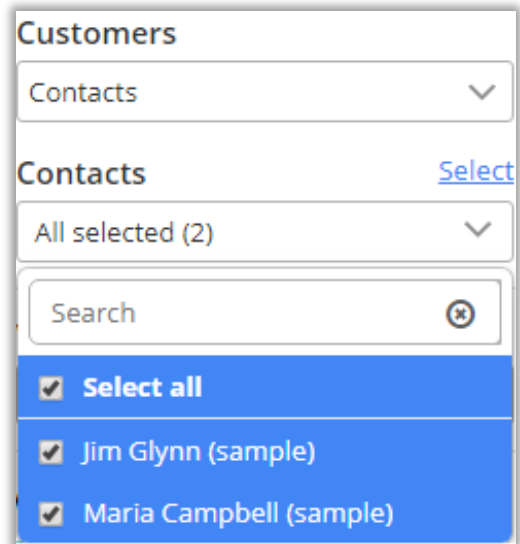


- As you select the “Resource”, you will get the records based on that.

- 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.



A screenshot of a dropdown menu titled "Customers". The menu is open, showing three options: "Contacts" (highlighted in blue), "Accounts", and "None selected". Each option has a downward arrow on its right side.



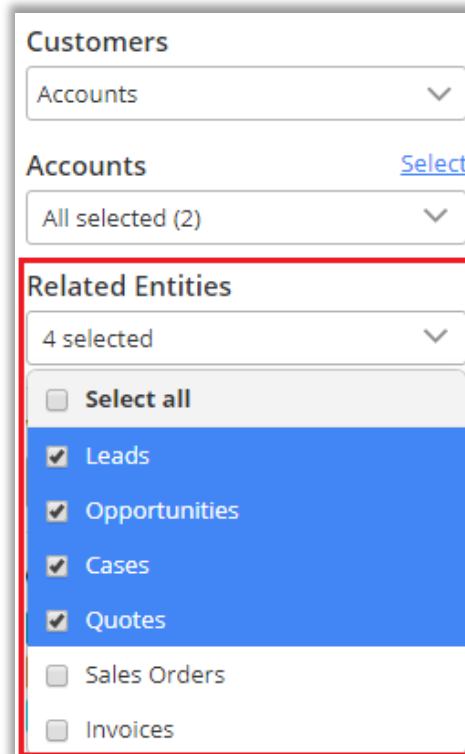
A screenshot of a dialog box titled "Customers". It contains a dropdown menu with "Contacts" selected. Below it is a "Select" link. A section labeled "All selected (2)" shows a search bar and a list of selected items: "Select all", "Jim Glynn (sample)", and "Maria Campbell (sample)". Each item has a checked checkbox on its left.

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.



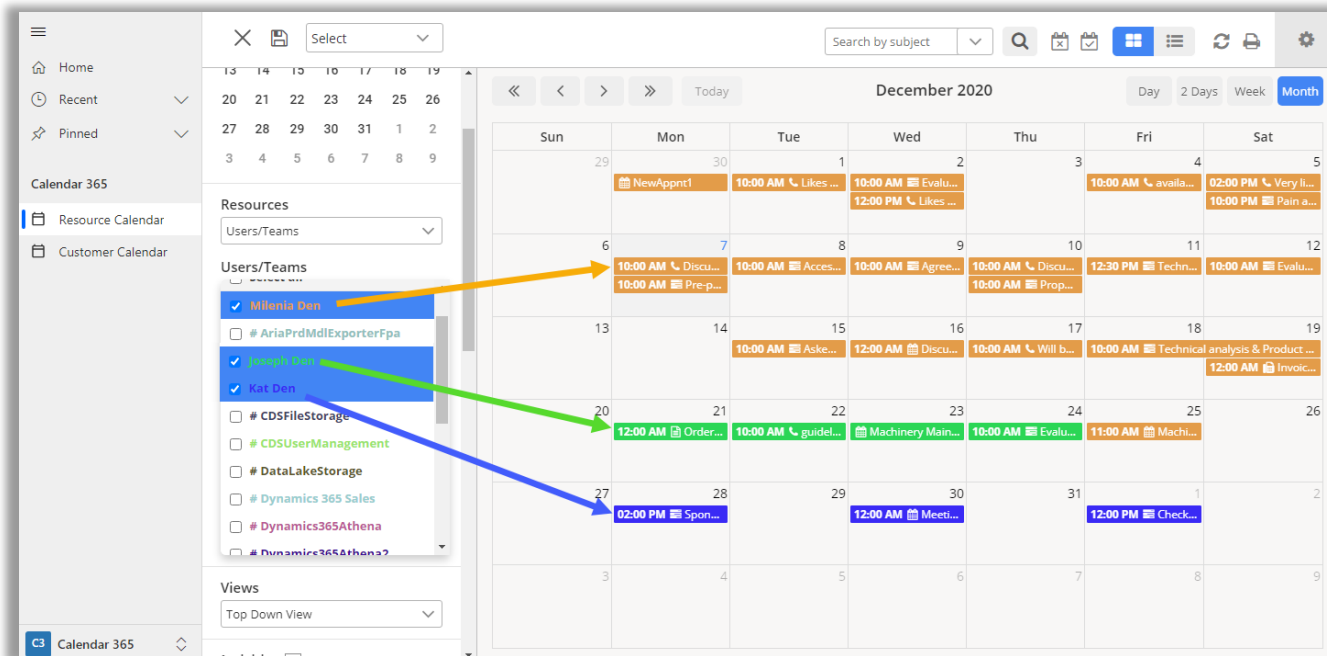
The screenshot shows a 'Customers' dropdown menu. The first section is 'Accounts' with a 'Select' link. The second section is 'Related Entities', which is highlighted with a red border. It shows '4 selected' and a list of entities with checkboxes: 'Leads', 'Opportunities', 'Cases', and 'Quotes' are all checked, while 'Sales Orders' and 'Invoices' are unchecked.

Customers	
Accounts	▼
Accounts	Select
All selected (2)	▼
Related Entities	
4 selected	▼
<input type="checkbox"/> Select all	
<input checked="" type="checkbox"/> Leads	
<input checked="" type="checkbox"/> Opportunities	
<input checked="" type="checkbox"/> Cases	
<input checked="" type="checkbox"/> Quotes	
<input type="checkbox"/> Sales Orders	
<input type="checkbox"/> Invoices	

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.

Owner wise Colorized activity

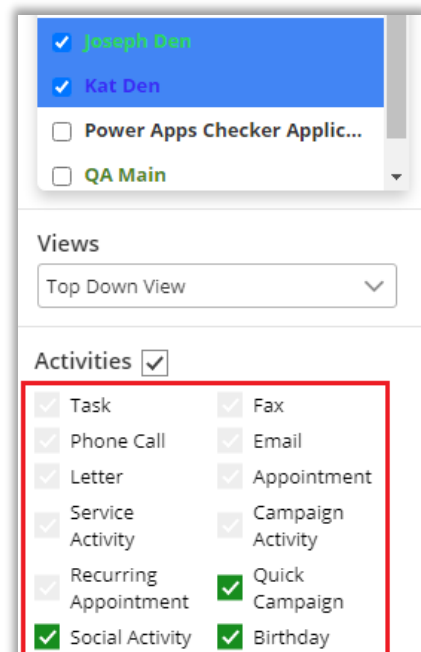
- If you have enabled the owner wise color option and set the specific color to different owners, the activities of the different owners will appear on the Calendar based on the Owner's color.
- On the Calendar, user can see the colorized activities based on the selected color for the specific owner (users). *i.e.*, the **orange** color activities belong to the user **Milenia Den**, the **green** color activities belong to the **Joseph Den** and the **blue** color activities belong to the **Kat Den**.



- These Color specific activities option helps admin or users to clarify the activities.

Note:

- The user can see different color combinations activities for specific users only under **Resource Calendar**.
- Once you have selected the Owner Color option, the individual color of the activities will be disabled and the user wise colorized activities will display on the calendar.



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.

The screenshot shows the 'Activities' configuration window. The 'Appointment' tab is selected. The 'Tooltip Attribute' dropdown is open, showing a list of attributes with 'Owner', 'Priority', and 'Regarding' selected. The 'Details Attribute' dropdown is also open, showing a list of attributes with 'Owner', 'Owning Business Unit', 'Owning Team', 'Owning User', 'Priority', 'Record Created On', and 'Regarding' selected.

Tooltip on Calendar

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

The screenshot shows a calendar view for December 2020. A tooltip is displayed over an activity titled 'Agree to above in Sponsor letter (sa...)'. The tooltip contains the following information:

- Activity Type: Task
- Due Date: 12/9/2020 10:00 AM
- Owner: Milenia Den
- Priority: Normal
- Regarding: Alpine Ski House (sample)
- Start Date: 12/9/2020 10:00 AM

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.

Activities

Task Fax Phone Call Email Letter **Appointment** Recurring Appointment

Service Activity Campaign Activity Bookable Resource Booking Custom Activity

Appointment ☒

Default Color

Overwrite Color By

Tooltip Attribute

Details Attribute ☒ Owner

☐ Owning Business Unit

☐ Owning Team

☐ Owning User

☒ Priority

☐ Record Created On

☒ Regarding

Convert To Case

Mark As Cancel

Activity Detail view on Calendar

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

Task

Agree to above in Sponsor letter (sam...)

Due Date: 12/9/2020 10:00 AM

Owner: Milenia Den

Priority: Normal

Regarding: Alpine Ski House (sample)

Start Date: 12/9/2020 10:00 AM

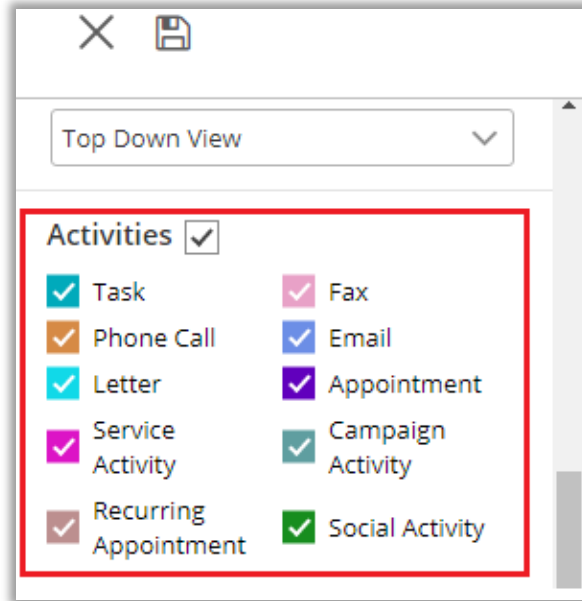
MARK AS COMPLETE **MARK AS CANCEL**

CONVERT TO OPPORTUNITY **CONVERT TO CASE**

Left side panel options

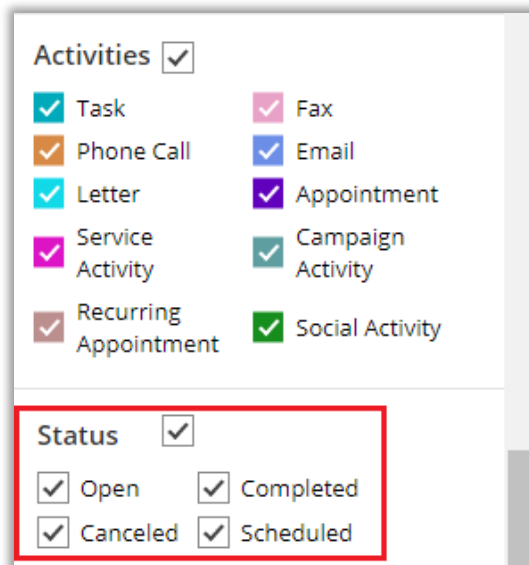
Activities

- 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.



Note: 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.

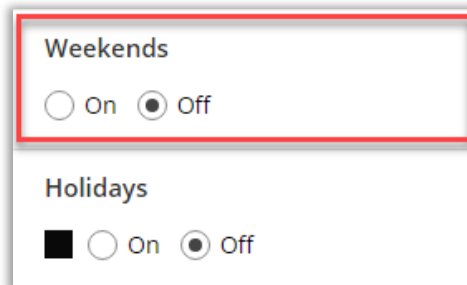
Priority

- 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.

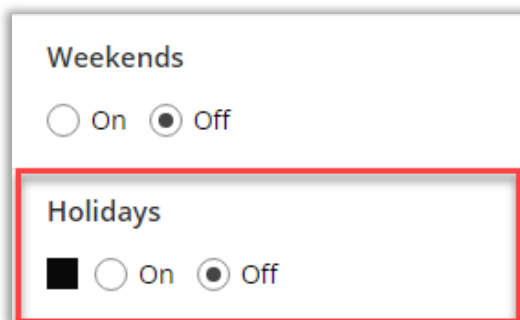


Weekends & Holidays

- 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.

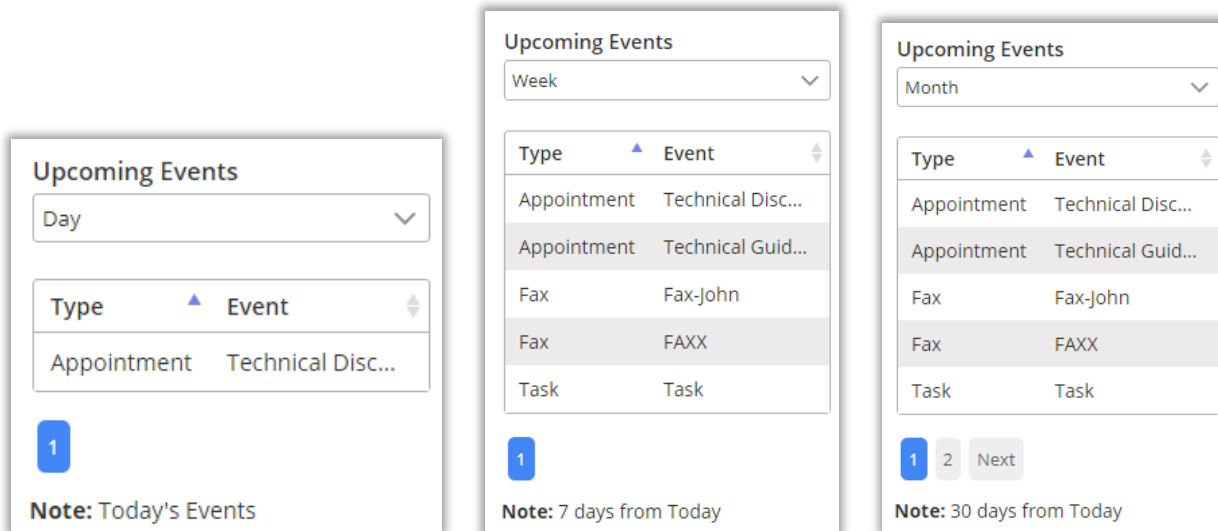
Calendar 365- "Installation & Configuration"

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
		10:00 AM 📅 Pre-propo...		Halloween 02:00 PM 📅 Sponsor ha...	02:50 PM 📅 Review Lead	
3	4	5	6	7	8	9
📅 Daylight Saving Time ...	10:00 AM 📞 Discuss ne...		10:00 AM 📞 Discuss ne...		10:00 AM 📅 Evaluation ... 02:50 PM 📅 Review Lead	
10	11	12	13	14	15	16
	📅 Veterans Day	10:00 AM 📅 Evaluation ... 12:00 PM 📞 Likes some ...	10:00 AM 📞 Mailed an i... 12:00 PM 📅 Verbal app...	10:00 AM 📞 availability ...	10:00 AM 📅 Evaluation ... 02:00 PM 📞 Very likely ... +2 more	10:00 AM 📞 Discuss hig...
17	18	19	20	21	22	23
10:00 AM 📅 Sponsor ag...	10:00 AM 📅 Access to ...	10:00 AM 📅 Agree to a... 10:00 AM 📞 Will be ord...	10:00 AM 📅 Proposal Is...		02:50 PM 📅 Review Lead	
24	25	26	27	28	29	30
	12:00 AM 📅 Appointme...		12:00 AM 📅 Juan's Birt...	📅 Thanksgiving Day 10:00 AM 📅 Asked for ...	📅 Black Friday 10:00 AM 📅 Evaluation ... 02:50 PM 📅 Review Lead	
1	2	3	4	5	6	7
	10:00 AM 📞 Likes our n...	12:00 PM 📅 Check sale...	10:00 AM 📞 guidelines f...		02:50 PM 📅 Review Lead	

Note: Holidays will be displayed as per the country selected by the admin from the Calendar 365 Configurations.

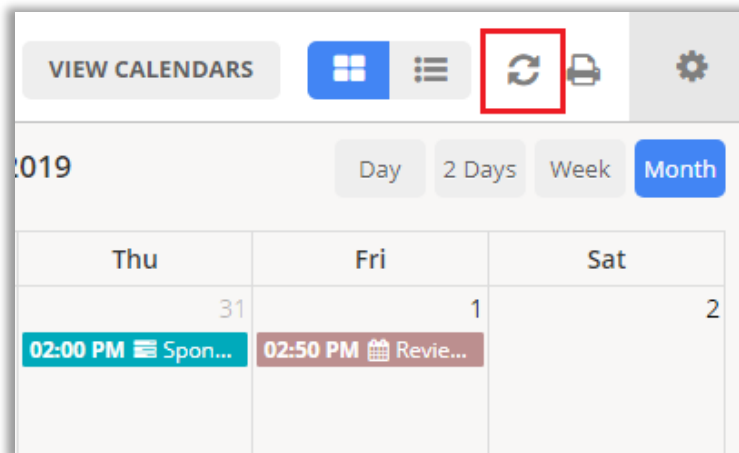
Upcoming Events

- 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.



Refresh

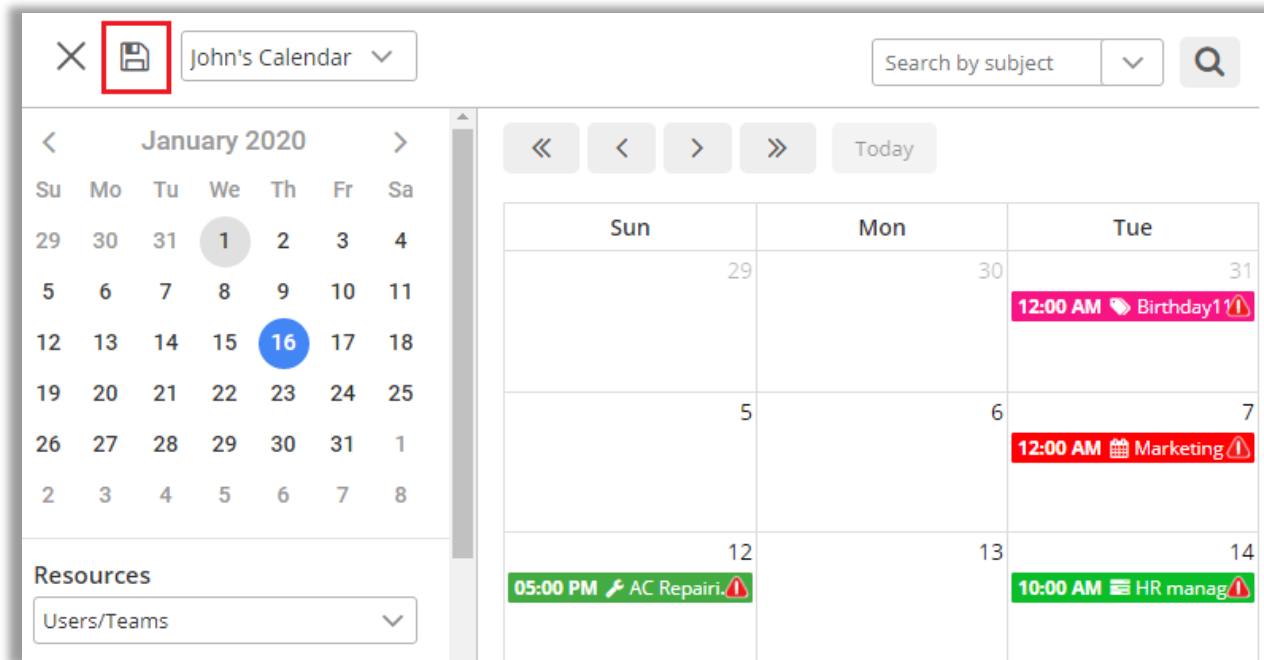
- To fetch all the events or activities from the CRM, click on the **'Refresh'** icon on the right-hand side of the calendar.



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.

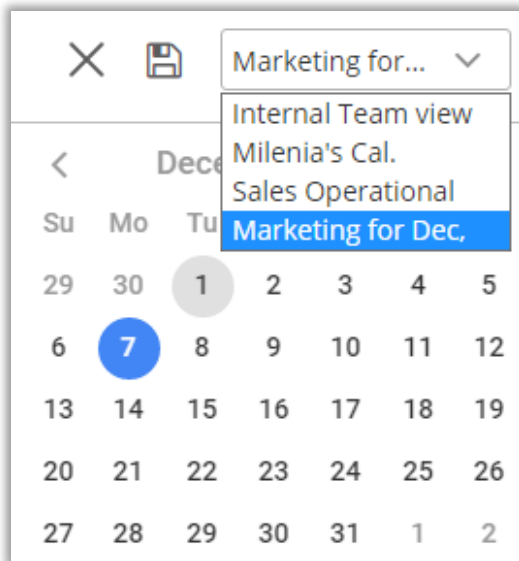
Save Calendar View
✕

Calendar view name *

Is public ☒

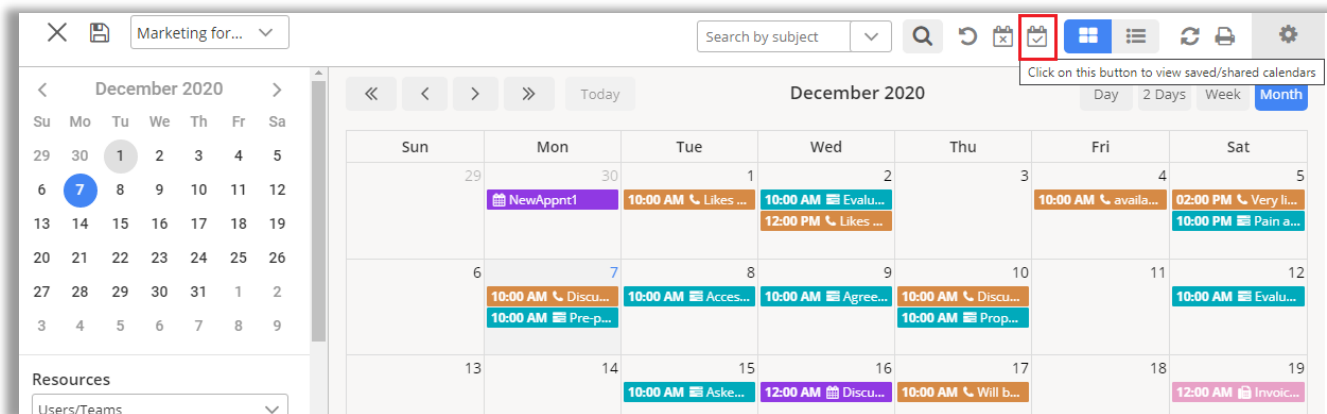
SAVE
CLOSE

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

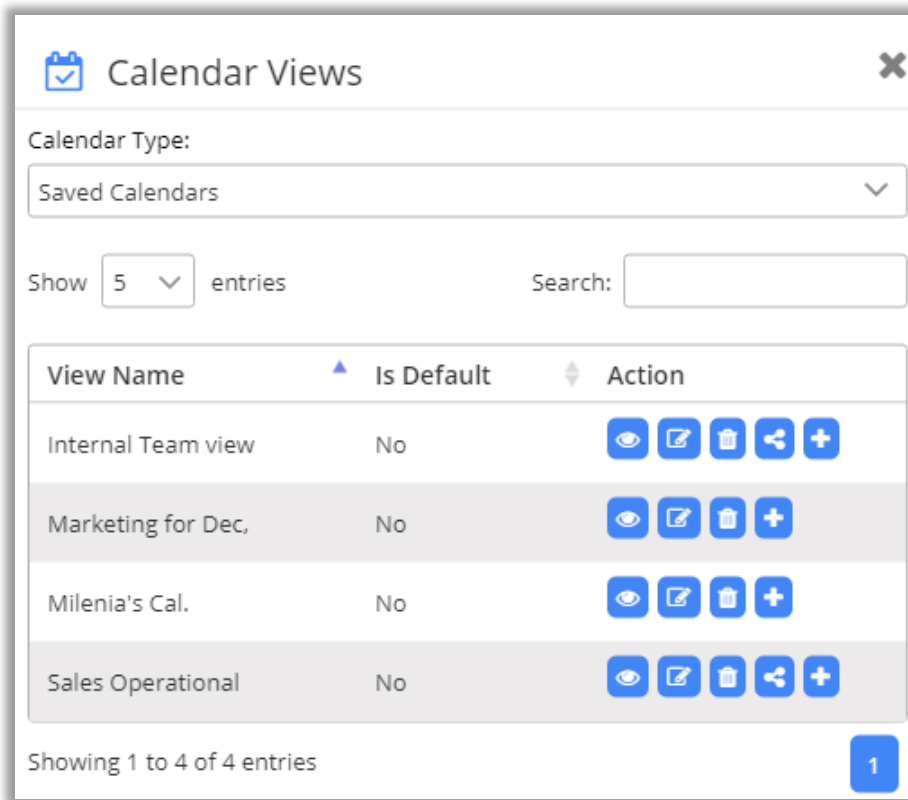


- You can see the list of **Saved Calendars** from the drop-down list of Calendar name.
- By click on any saved Calendar name, you can check that Calendar view.

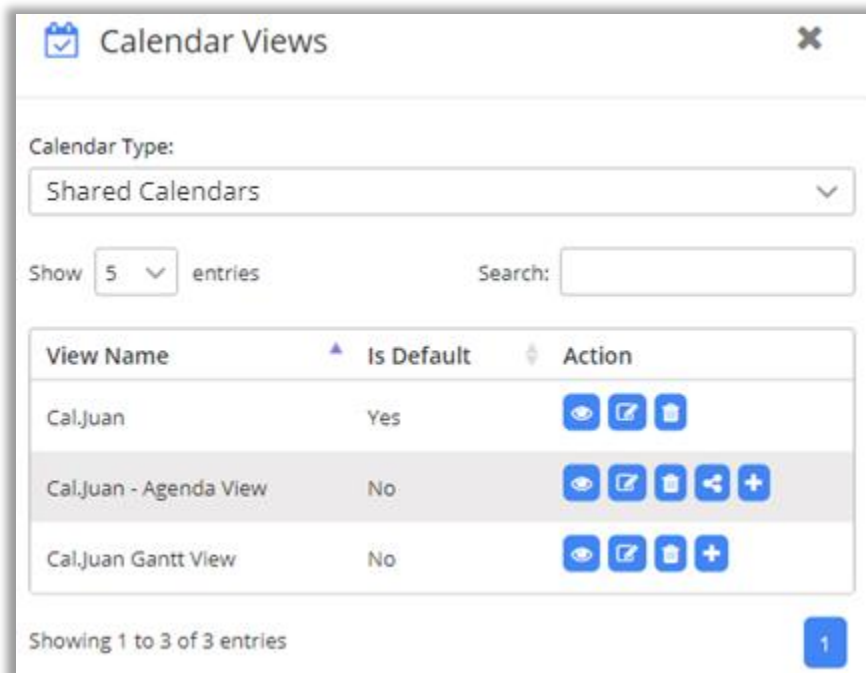
View Saved Calendar list



- Users can access saved calendar views by clicking on right ☒ icon that indicates the **View Calendars**.
- After you click on that icon, a dialog box opens with dropdown named “Calendar Views” to check and edit the Calendars from the list.
- Under the Calendar type, the user can check the ‘Saved Calendars’ and ‘Shared Calendars’ by other users/teams.
- ‘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.



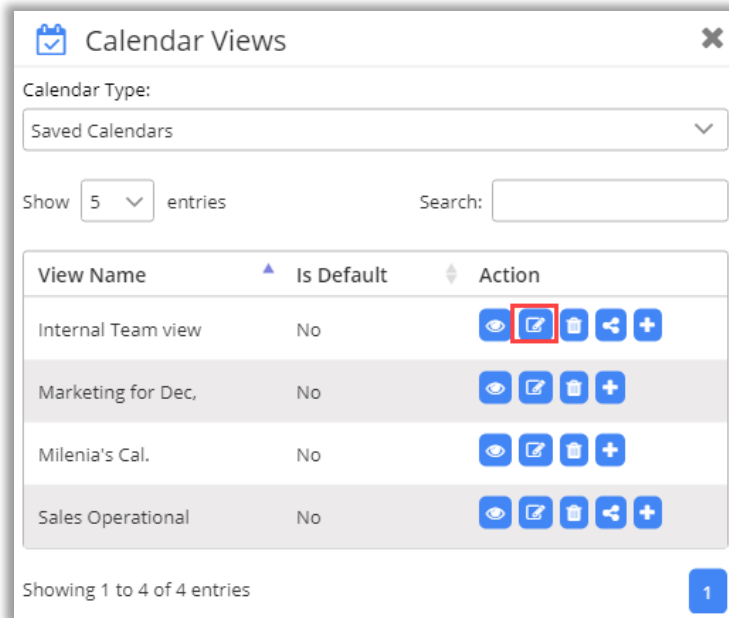
- From the Saved Calendars list, you can see the View name with their actions. You can select a default calendar by pressing + icon.



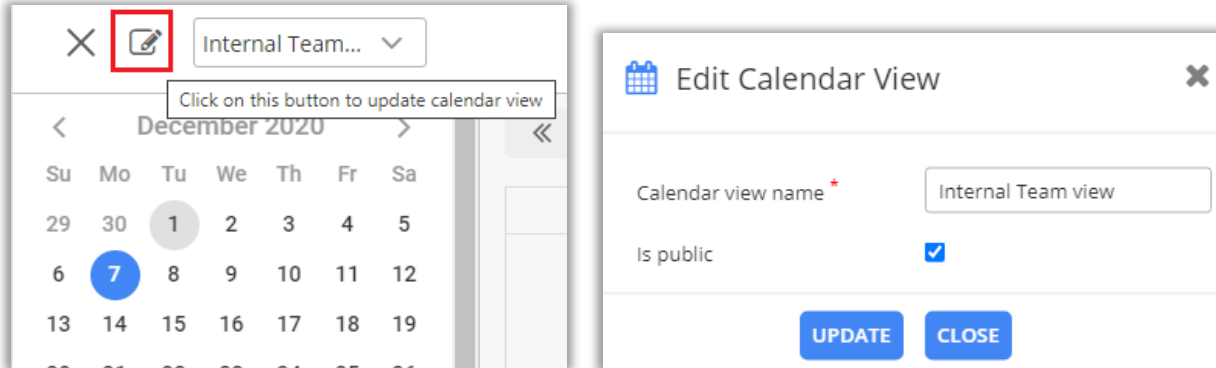
- For saved calendar and being the owner of that calendar, you can View, Edit, Delete and Share calendar. 'Share' option is available only when calendar is private (should not select as 'Is Public').
- Also, different actions are available only when you are the owner of the calendar, else it just shows 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.

Edit & Update Calendar



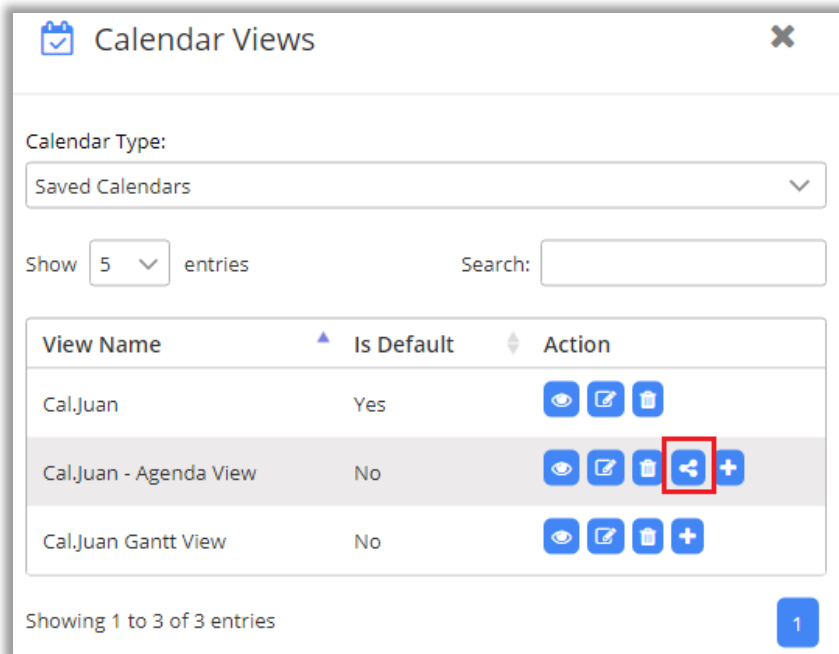
- On clicking 'edit' icon, you get to update calendar name and select if calendar is public or private.



- 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.



Calendar Views

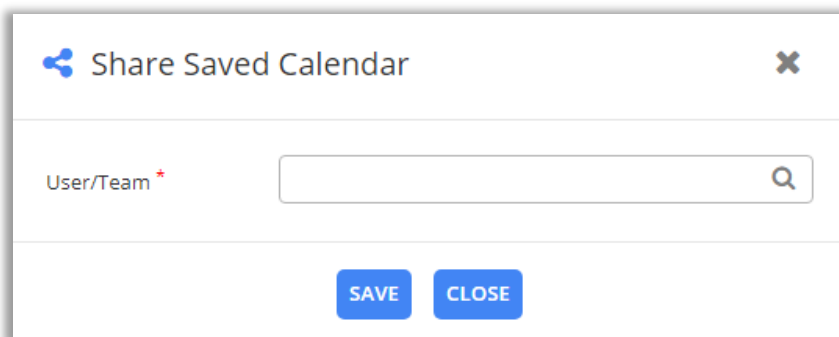
Calendar Type:
Saved Calendars

Show 5 entries Search:

View Name	Is Default	Action
Cal.Juan	Yes	  
Cal.Juan - Agenda View	No	    
Cal.Juan Gantt View	No	   

Showing 1 to 3 of 3 entries 1

- 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.



Share Saved Calendar

User/Team *

SAVE CLOSE

Look Up Records

Enter your search criteria.

Look for:

Look in:

Search:

<input type="checkbox"/>	Full Name ↑	Position	Main Phone
	Juan Carlos		7698182082
	Mark Carlos		
	Rene Carlos		

1 - 3 of 3 (0 selected) Page 1

Selected records:

Select Remove

New Add Cancel

- 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.

Calendar Views

Calendar Type:

Saved Calendars

Saved Calendars

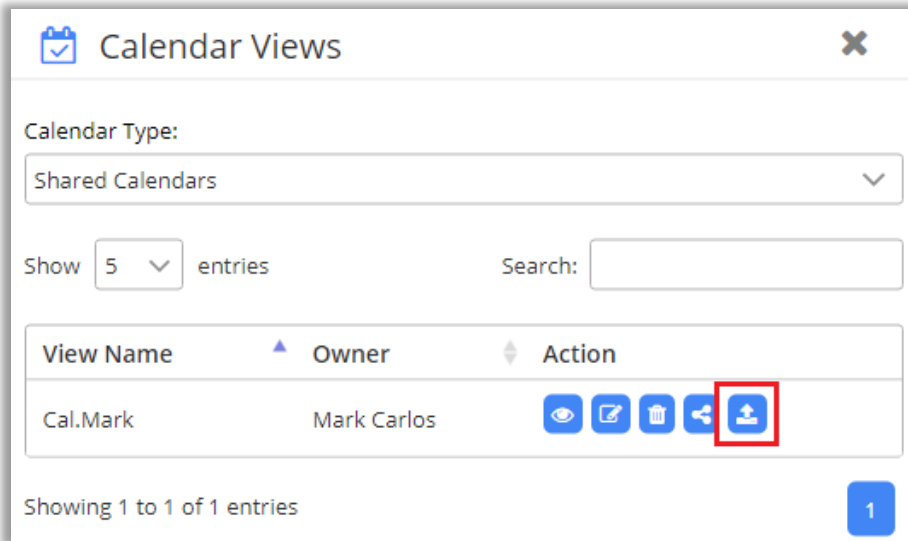
Shared Calendars

View Name	Owner	Action
123 test	Jacob hellon	
CalendarViewDemo	Jacob hellon	
Template1	Jacob hellon	

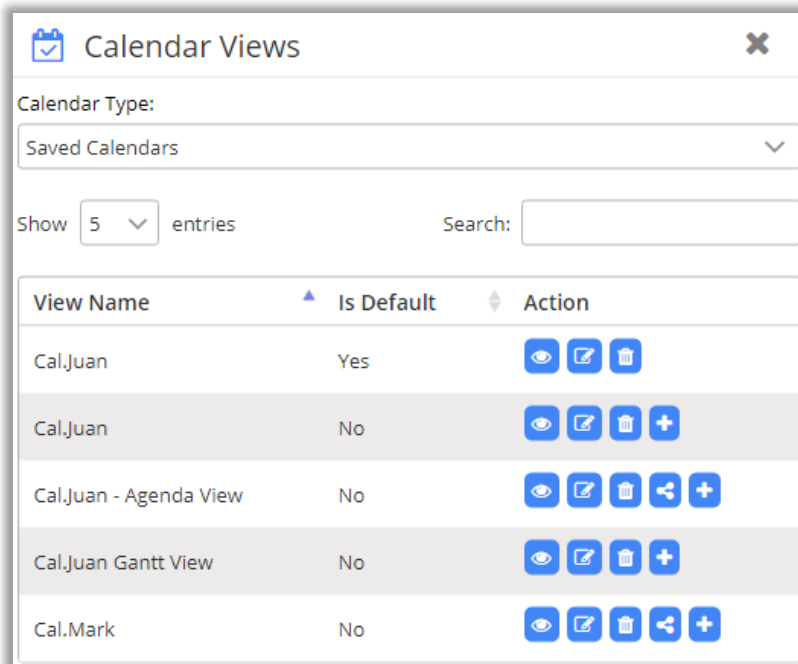
- When saved calendar is previewed, it enables a button to go back to the current view (previous view).

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.



Share Appointment Activity

- You can also share the appointment with other users (team members) at the same time when you are creating an Appointment activity.
- For that, you need to select that "User" from the Look Up Records in the Required field.

The screenshot shows the 'Create Activity' dialog box. The 'Activity' dropdown is set to 'Appointment'. The 'Subject' field contains 'Sales Inquiry'. The 'Start Date' is '12/14/2020 04:00 PM' and the 'End Date' is '12/14/2020 06:00 PM'. The 'All Day Event' checkbox is unchecked. The 'Required' field shows 'Joseph Den' with a search icon. The 'Optional' and 'Location' fields are empty. A 'CREATE' button is at the bottom. On the right, the 'Look Up Records' panel is open, showing search criteria: 'Look for' is 'User', 'Look in' is 'User Lookup View', and the search box contains 'Search for records'. Below this, a list of records is shown with a checkbox next to 'Joseph Den' which is checked. A yellow arrow points from this checkbox to the 'Required' field in the main form.

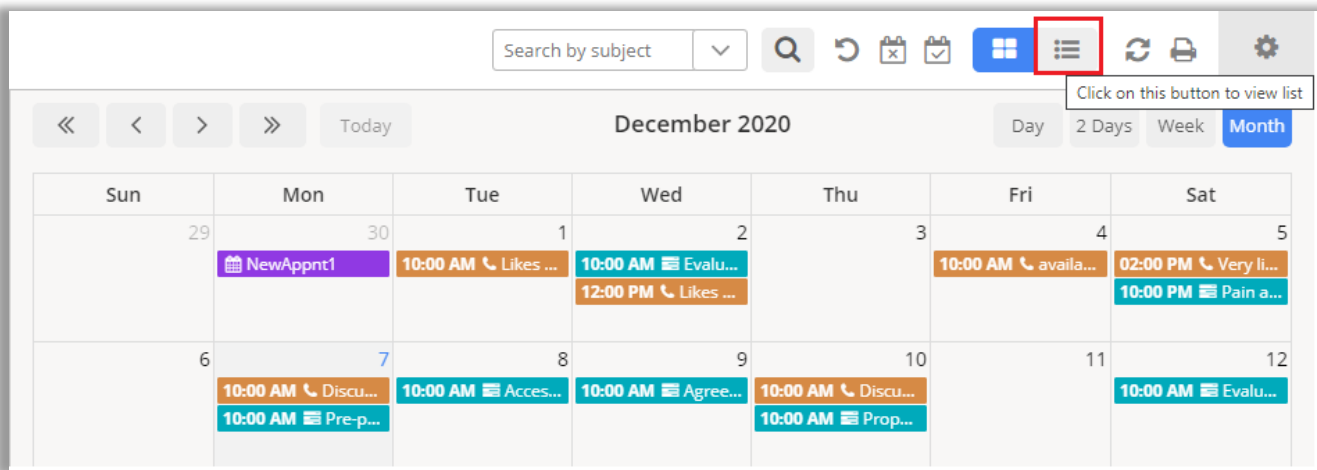
Look for	Look in	Search
User	User Lookup View	Search for records

Full Name ↑
Productinsights
SIAutoCapture
<input checked="" type="checkbox"/> Joseph Den
<input type="checkbox"/> Kat Den

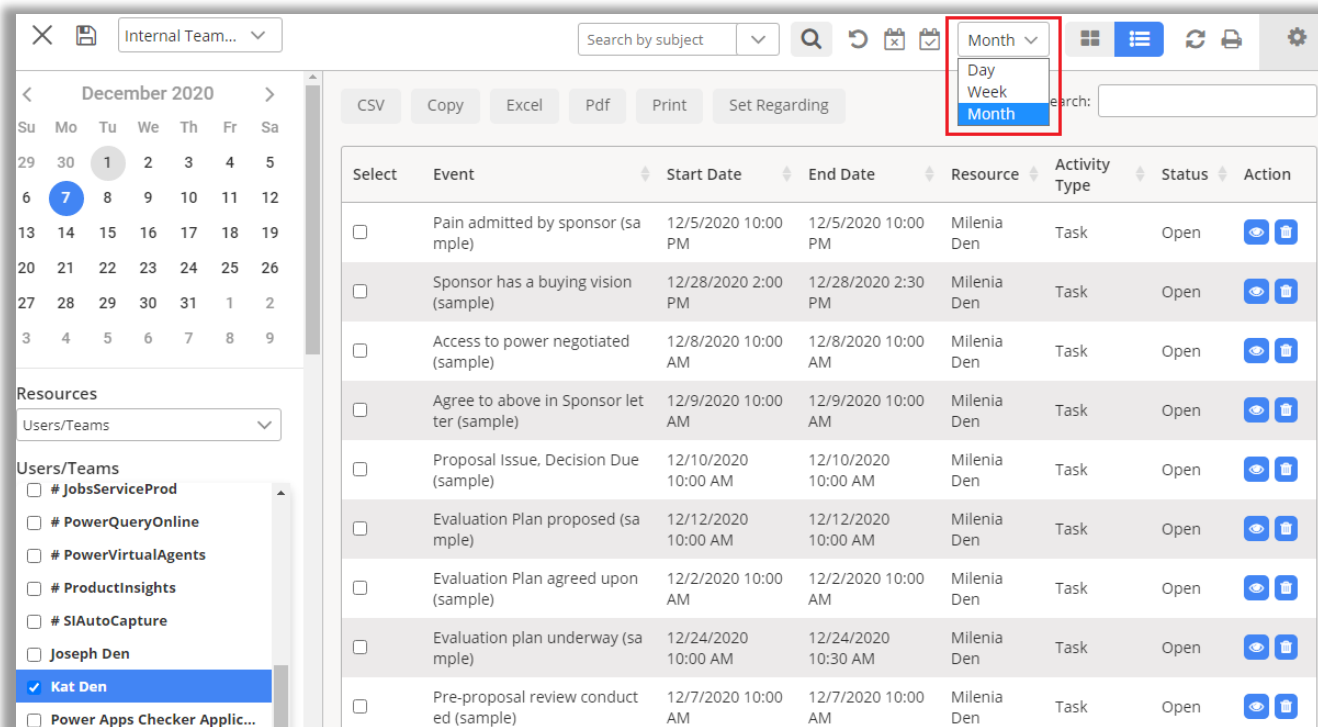
- Once the appointment is created, the other user will also get the appointment in his/her calendar.

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.

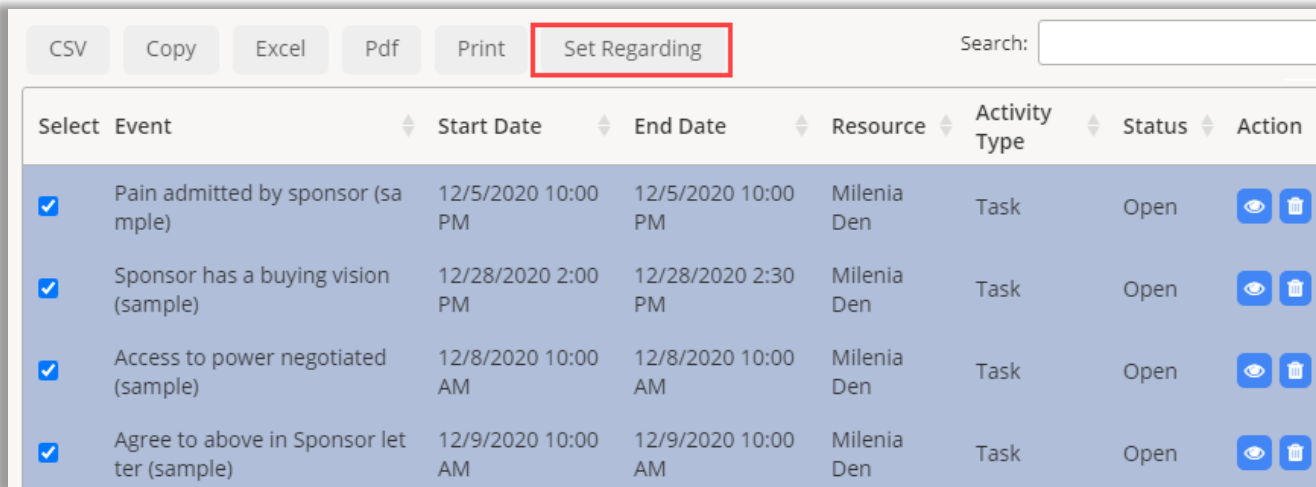


- List view works based on **small calendar** available on left side of the calendar view. You will get the list of events based on day/date selected in the smaller left side calendar.
- For **Day** span, it shows list of events that fall under the days that are selected.
- For **Week** time span, it 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.

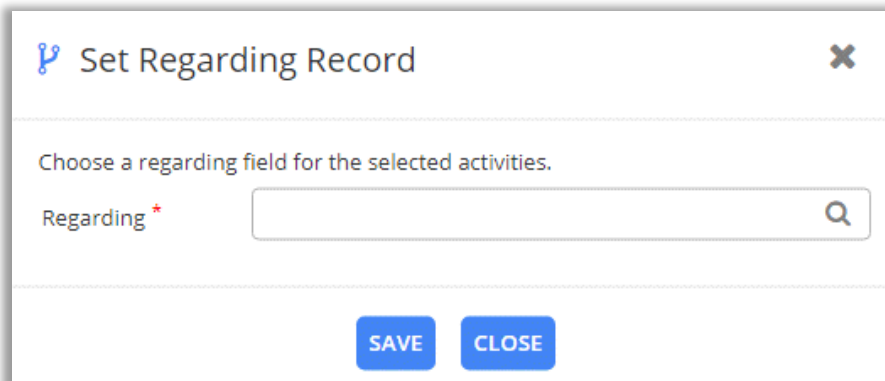
Set Regarding under Grid View

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



Select	Event	Start Date	End Date	Resource	Activity Type	Status	Action
<input checked="" type="checkbox"/>	Pain admitted by sponsor (sample)	12/5/2020 10:00 PM	12/5/2020 10:00 PM	Milenia Den	Task	Open	
<input checked="" type="checkbox"/>	Sponsor has a buying vision (sample)	12/28/2020 2:00 PM	12/28/2020 2:30 PM	Milenia Den	Task	Open	
<input checked="" type="checkbox"/>	Access to power negotiated (sample)	12/8/2020 10:00 AM	12/8/2020 10:00 AM	Milenia Den	Task	Open	
<input checked="" type="checkbox"/>	Agree to above in Sponsor letter (sample)	12/9/2020 10:00 AM	12/9/2020 10:00 AM	Milenia Den	Task	Open	

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



Set Regarding Record

Choose a regarding field for the selected activities.

Regarding *

SAVE **CLOSE**

- 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,

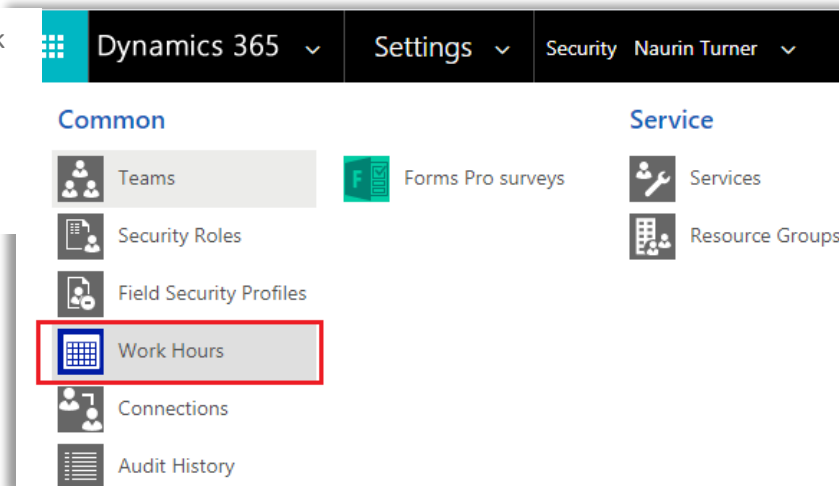
Resource Scheduler (Manage Working Hours)

- 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.

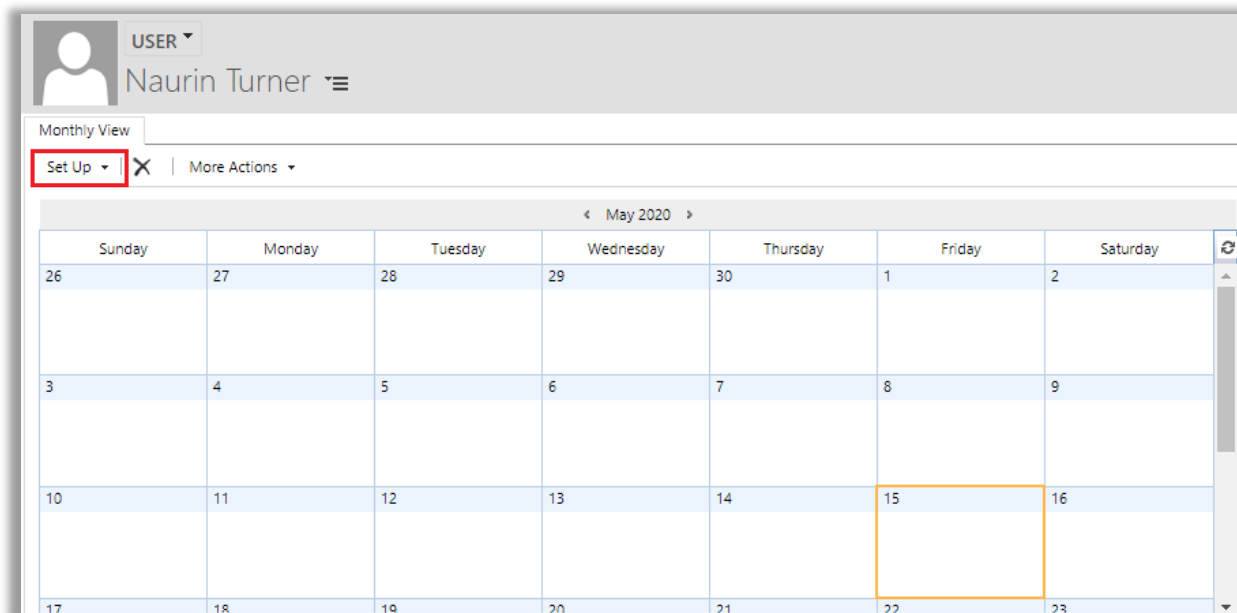
Set the Working hours for default CRM users:

- 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.

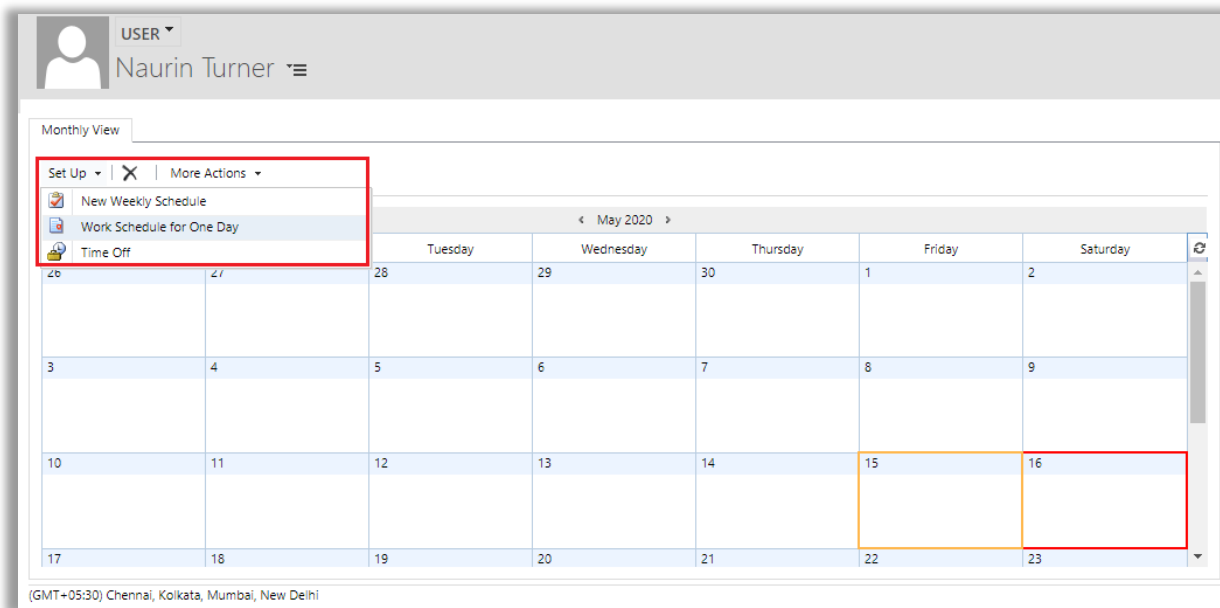
- Besides the Username click on the down arrow ▼ and select Working hours.



- 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.

Work Hours and Service Restrictions ? x

the hours this resource can be scheduled for services and any service restrictions that

Work Hours | Service Restrictions

Set a date: 05/16/20

Show Capacity >>

Enter work hours and breaks

Type	Start	End	
Work Hours	8:00 AM	5:00 PM	Add Break

Total: 9 hours, Working: 9 hours, Breaks: 0 minutes

Select the time zone

Time Zone: (GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi

OK Cancel

- 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.

The screenshot displays the AppJetty Calendar interface. On the left sidebar, the 'Views' dropdown menu is highlighted with a red box and set to 'Resource Scheduler'. Below it, the 'Availability' legend shows a green square for 'Available', a blue square for 'Break', and an orange square for 'Leave'. The main calendar area shows a grid for May 2020, with the date range '1 - 31 May, 2020' selected. The grid shows time slots from 12am to 12pm. A red box highlights a green bar representing 'Available' status for Naurin Turner on Saturday, May 16th, from 6am to 12pm.

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:

Resource Scheduling ⓘ

Active ⓘ ☒ AppJetty Scheduler ▼

- 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.

sources
 Users/Teams ▼
 Users/Teams
 Hellen Turner ▼

Views
 Top Down View ▼
 Top Down View
 Gantt View
 Timeline View
 Agenda View
Resource Scheduler

Status ☐
☒ Open ☐ Completed

10
17
24
31

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

<< < > >> Today 1 - 31 May, 2020

Users/Teams	Sun 17/5		Mon 18/5						
	6pm	9pm	12am	3am	6am	9am	12pm	3pm	6pm
Hellen Turner									

- 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.

+

Create Activity

×

Activity

Mark as available

▼

Recurring Type

One Day

▼

Start Date *

05-18-2020

9:00 AM

End Date *

05-18-2020

12:00 PM

Owner

Hellen Turner

CREATE

1 - 31 May, 2020									
Users/Teams	Sun 17/5		Mon 18/5						
	9am	9pm	12am	3am	6am	9am	12pm	3pm	6pm
Hellen Turner									

Views

Resource Scheduler

▼

Availability

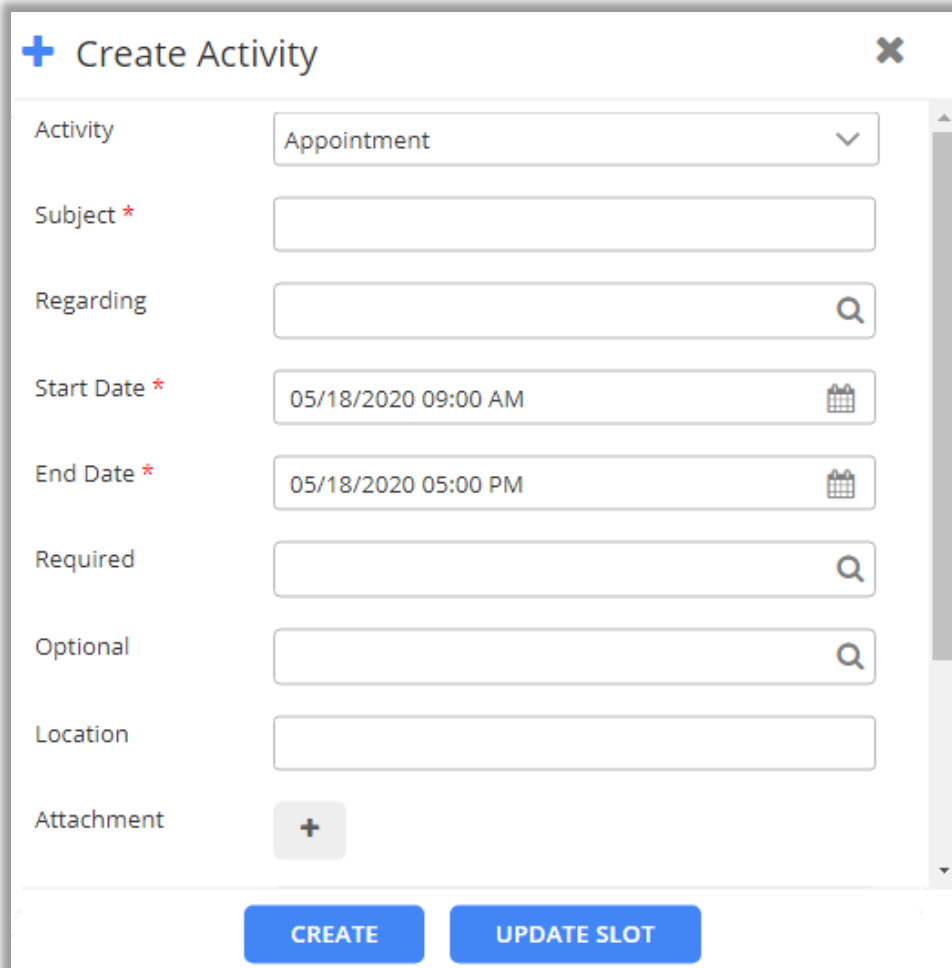
Available

Break

Leave

- 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.



The screenshot shows a 'Create Activity' dialog box with a close button (X) in the top right corner. The dialog contains the following fields and controls:

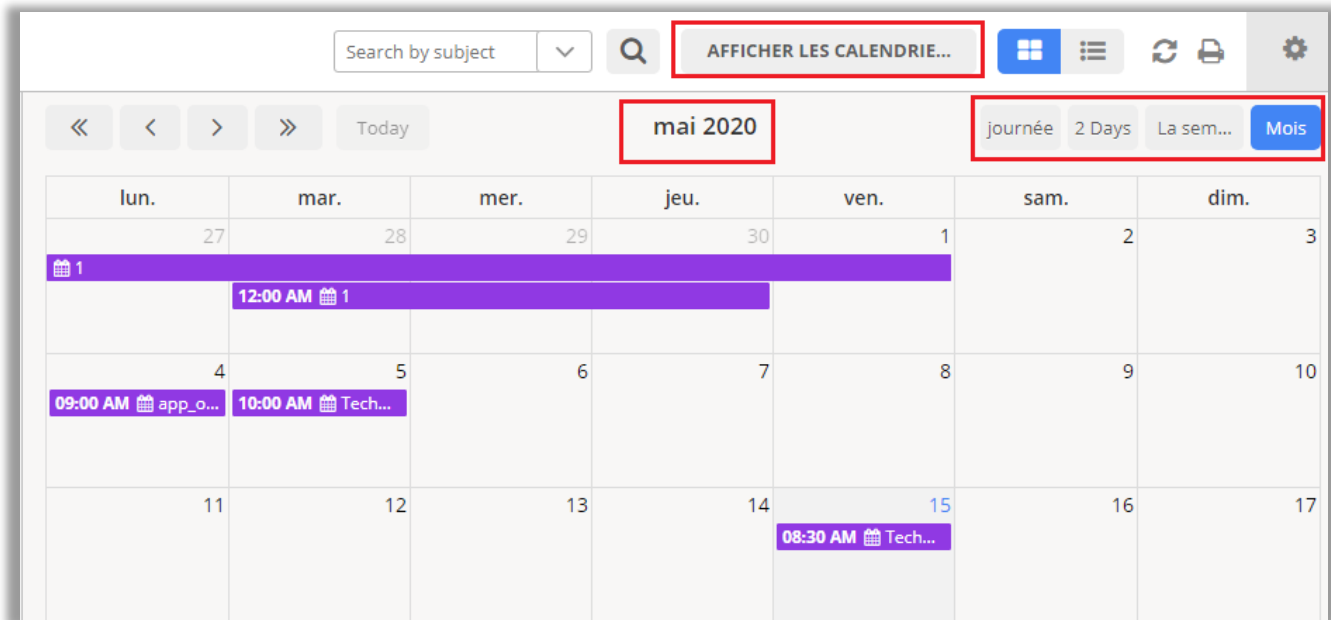
- Activity:** A dropdown menu with 'Appointment' selected.
- Subject *:** A text input field.
- Regarding:** A text input field with a search icon (magnifying glass) on the right.
- Start Date *:** A date and time picker showing '05/18/2020 09:00 AM' with a calendar icon on the right.
- End Date *:** A date and time picker showing '05/18/2020 05:00 PM' with a calendar icon on the right.
- Required:** A text input field with a search icon (magnifying glass) on the right.
- Optional:** A text input field with a search icon (magnifying glass) on the right.
- Location:** A text input field.
- Attachment:** A button with a plus sign (+).

At the bottom of the dialog are two blue buttons: 'CREATE' and 'UPDATE SLOT'.

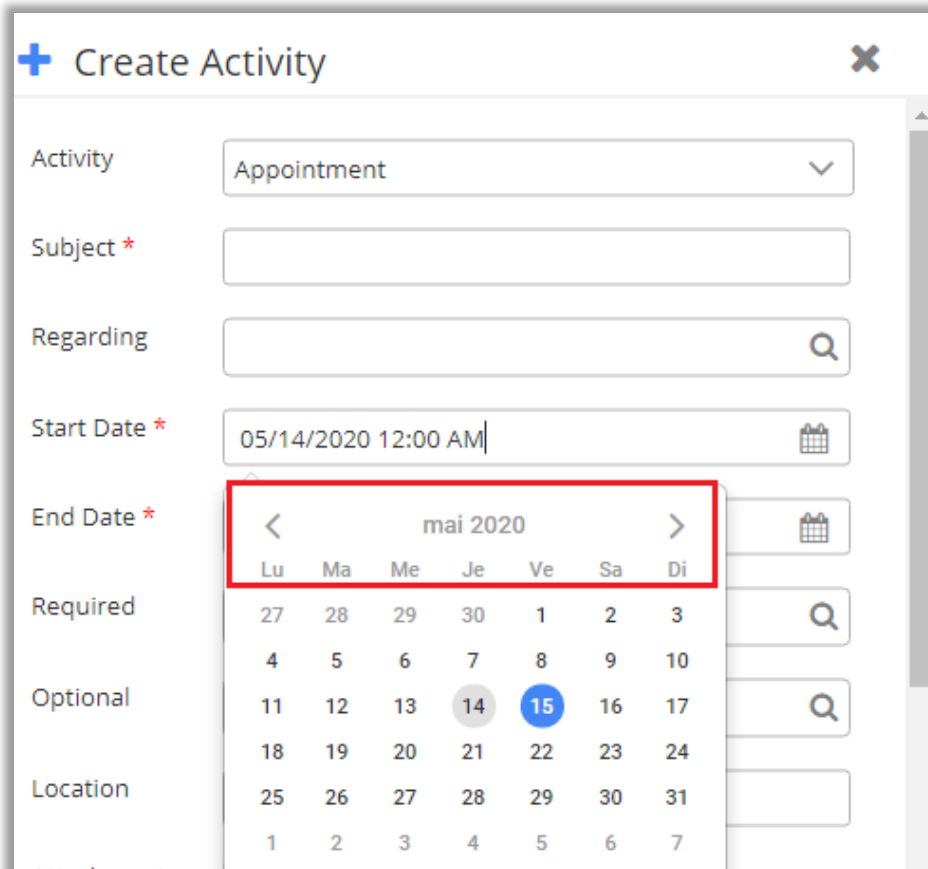
- From here, you can again edit the Slot by clicking on **Update Slot** button if require.
- In this way, you can schedule the work for the resources(users) based on their availability.

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.

The image displays two side-by-side screenshots of the 'Create Activity' form in a CRM system, illustrating different date formats. Both forms have a title bar with a blue plus icon and a close icon (X). The form fields include: 'Activity' (a dropdown menu with 'Appointment' selected), 'Subject *' (a text input field), 'Regarding' (a text input field with a search icon), 'Start Date *' (a date and time picker), and 'End Date *' (a date and time picker). In the left screenshot, labeled 'Format-1' in large blue text at the bottom, the date fields are highlighted with a red rectangle and show the format '05/16/2020 12:00 AM'. In the right screenshot, labeled 'Format-2' in large blue text at the bottom, the date fields are highlighted with a red rectangle and show the format '16/05/2020 12:00 AM'.

Field	Format-1	Format-2
Start Date *	05/16/2020 12:00 AM	16/05/2020 12:00 AM
End Date *	05/17/2020 12:00 AM	17/05/2020 12:00 AM

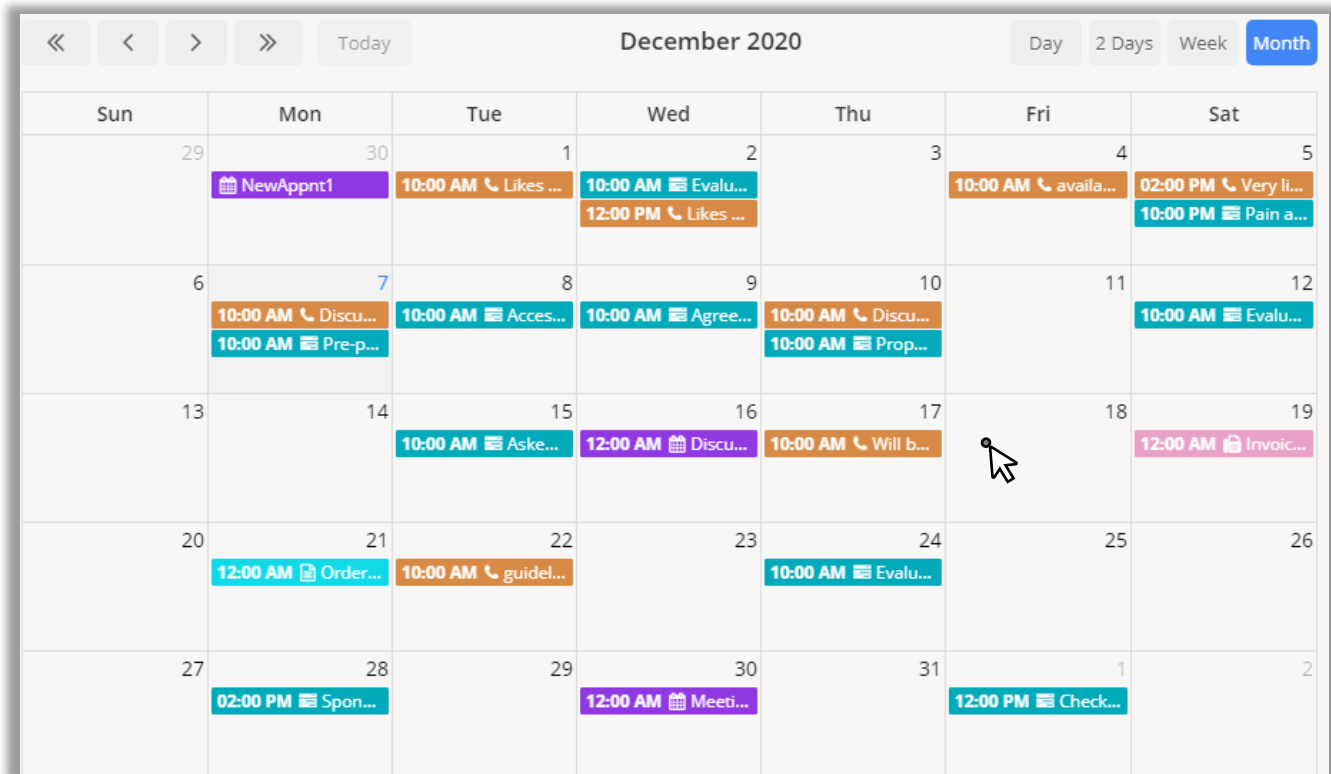
Calendar Activities

➤ Calendar Activities: You can Create, Edit, View, Copy & Share an activity.

- Create an Activity
 - All Day event for Appointment 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
- Print Calendar

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:

+

Create Activity

×

Activity

Task

Task

Subject *

Fax

Phone Call

Email

Letter

Appointment

Recurring Appointment

Service Activity

Social Activity

Regarding

11-16-2019 12:00 AM

Start Date *

End Date *

Priority


Normal


- **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.


+ Create Activity ✕

Activity Task ▾

Subject * Technical analysis & Product enhancement

Regarding 

Start Date * 12/18/2020 12:00 AM 

End Date * 12/19/2020 12:00 AM 

Priority Normal ▾

Description

Owner Milenia Den ▾

CREATE

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

Lookup Record
Enter your search criteria.

Look for: **Contact** ☐ Show Only My Records

Look in: Account
Campaign
Campaign Activity
Case
Contact
Contract
Entitlement
Entitlement Template
Invoice
Knowledge Article
Knowledge Base Record
Lead
Opportunity
Order
Quote

Full Name	Email
<input checked="" type="checkbox"/> Jim G	someone_j@example.com
Maria	someone_d@example.com
Nanc	someone_c@example.com
Patric	someone_k@example.com
Paul Cannon (sample)	someone_h@example.com
Rene Valdes (sample)	someone_i@example.com
Robert Lyon (sample)	someone_g@example.com
Scott K...	someone_f@example.com

1 - 13 of 13 (1 selected) Page 1

[New](#) [Add](#) [Cancel](#) [Remove Value](#)

- 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.

+ Create Activity ✕

Activity: Task

Subject *: Technical analysis & Product enhancement

Regarding: **Hi-rod pneumatics ...** 🔍

- Selected record can be seen in Regarding edit box.

+ Create Activity ×

Activity Task ▼

Subject * Technical analysis & Product enhancement

Regarding Arika Shevlin ✕ 🔍

Start Date * 12/18/2020 12:00 AM 📅

End Date * 12/19/2020 12:00 AM 📅

Priority Normal ▼

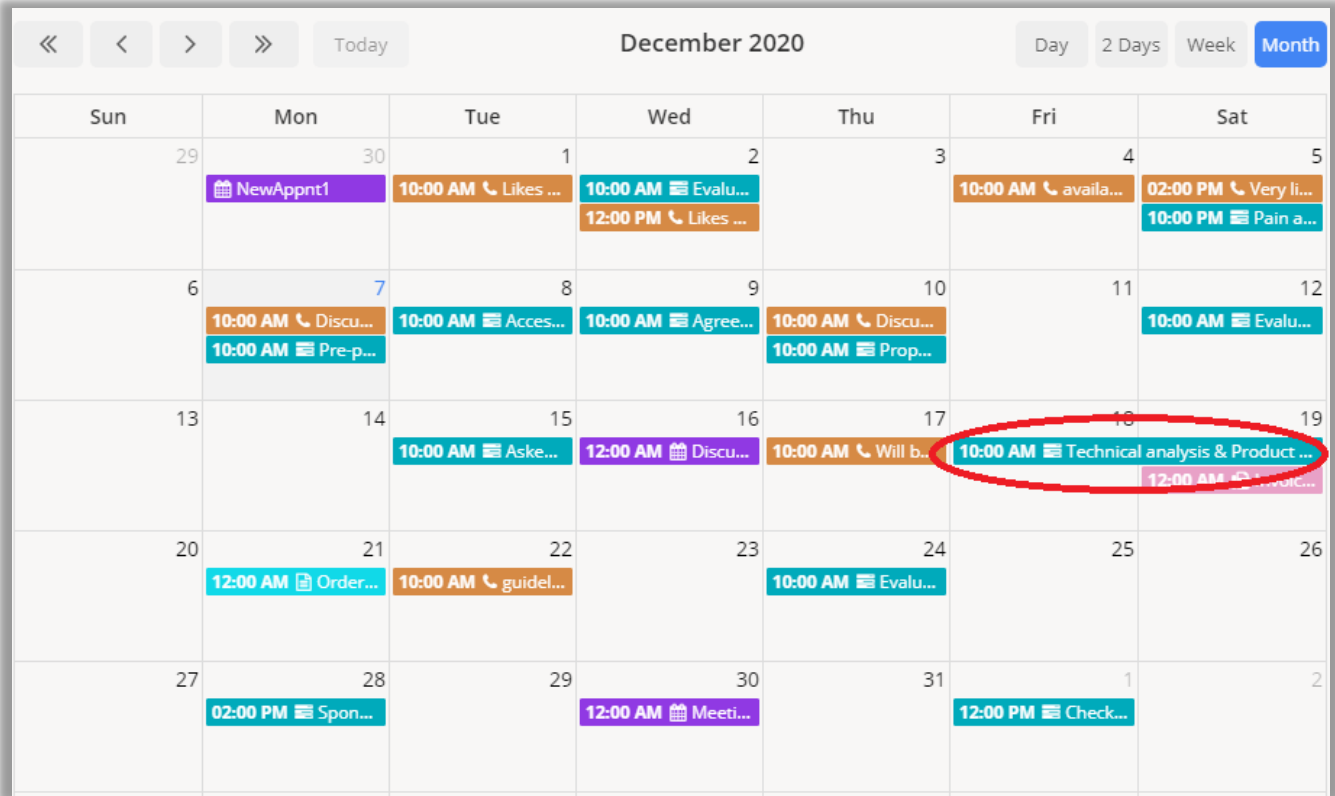
Description Technical analysis & Product enhancement

Owner Milenia Den ▼

CREATE

- **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.



All day event for Appointment

- If the user is adding the “Appointment” activity, they will get an option to enable the All Day Event for displaying the appointment activity whole day.

+ Create Activity

Activity: Appointment

Subject *: Product V1428 Service

Regarding: Damaged during sh...

Start Date *: 12/08/2020 11:30 AM

End Date *: 12/08/2020 02:00 PM

All Day Event: ☒

Required: Binni Priestland

Optional:

Location: As per SMS instruction

CREATE

- ‘Tick’ the checkbox of the **All Day Event** when you are adding the “Appointment” activity to set the appointment activity for all day.

- Every “all day” appointment will be seen in the top of day/week/ day view in the **All day** slot.

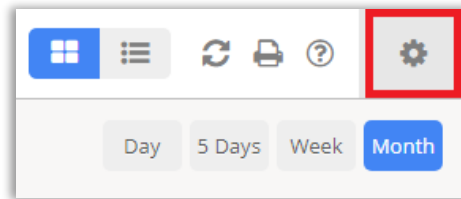
Navigation: << < > >> Today 23 December, 2020 Day 2 Days Week Month

Milenia Den

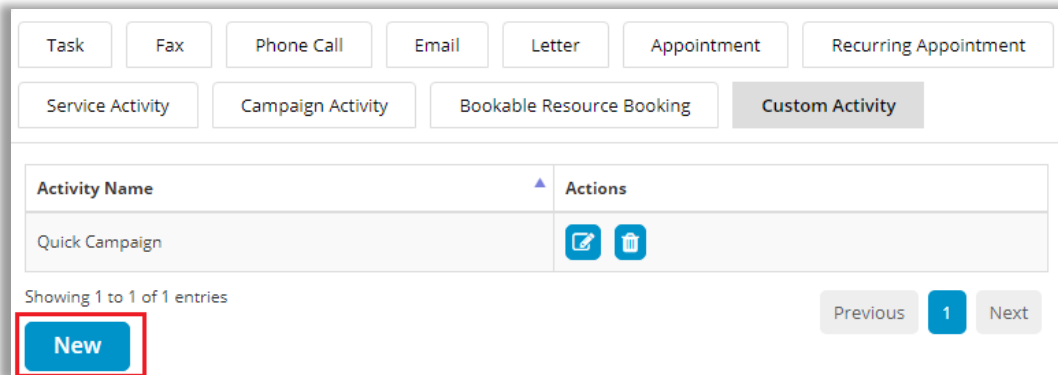
All day	Machinery Maintenance
8am	
9am	
10am	

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.

Activity Name

Quick Campaign

Showing 1 to 1 of 1 entries

Entity Social Activity

Default Color #178d1e

Overwrite Color By None

Tooltip Attribute 5 selected

Details Attribute 5 selected

Title Attribute Subject

Email Reminder ☐ On ☒ Off





Minutes 0

Read Only ☐


Buttons Configuration ☒ Mark As Complete ☒ Mark As Cancel

New **Save**








- You can 'Edit' and 'Delete' the Custom activities you have created.

Activity Name	Actions
Quick Campaign	 
Social Activity	 

- If the custom activity is not selected as **Read Only**, any of the users can edit and perform the action for custom activity.

 Booking Alert

Introduction to new joinee

Due Date:

1/24/2020 12:00 AM

Owner:

Jhonson Nick

Priority:

Normal

Regarding:

Fabrikam, Inc.


Start Date:

1/23/2020 12:00 AM

MARK AS COMPLETE

MARK AS CANCEL

- If the custom activity is selected as **Read Only**, the users cannot edit and perform any action for the custom activity.

 Booking Alert

Introduction to new joinee

Due Date:

1/24/2020 12:00 AM

Owner:

Jhonson Nick

Priority:

Normal

Regarding:

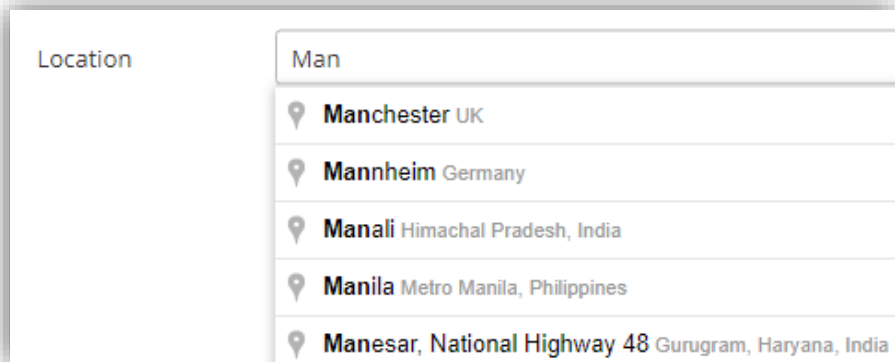
Fabrikam, Inc.

Start Date:

1/23/2020 12:00

Location selection

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

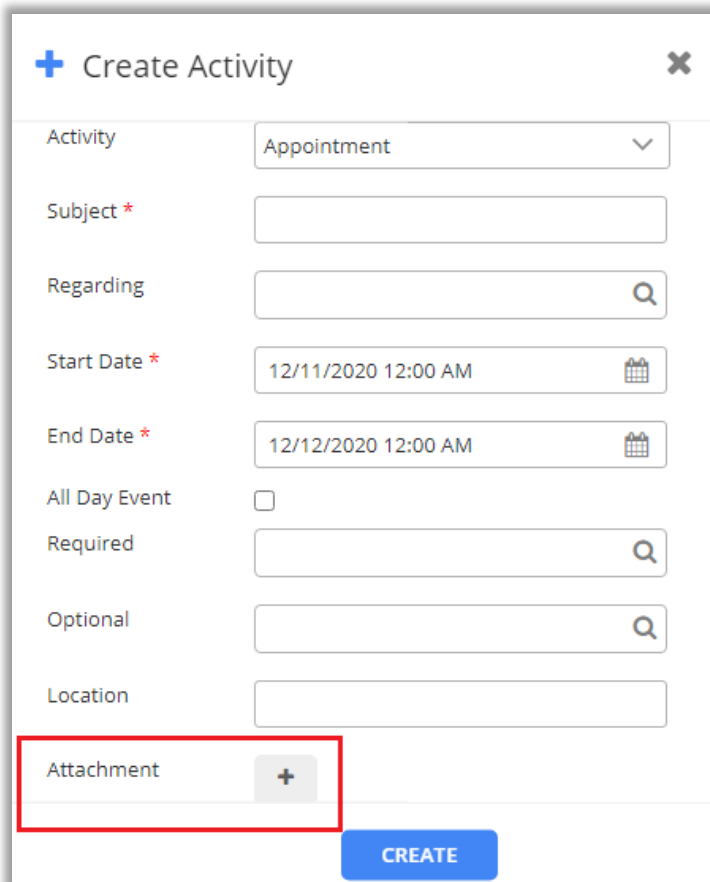


The screenshot shows a 'Location' input field with the text 'Man' entered. Below the input field, a dropdown menu is open, displaying a list of location suggestions, each preceded by a location pin icon. The suggestions are: 'Manchester UK', 'Mannheim Germany', 'Manali Himachal Pradesh, India', 'Manila Metro Manila, Philippines', and 'Manesar, National Highway 48 Gurugram, Haryana, India'.

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

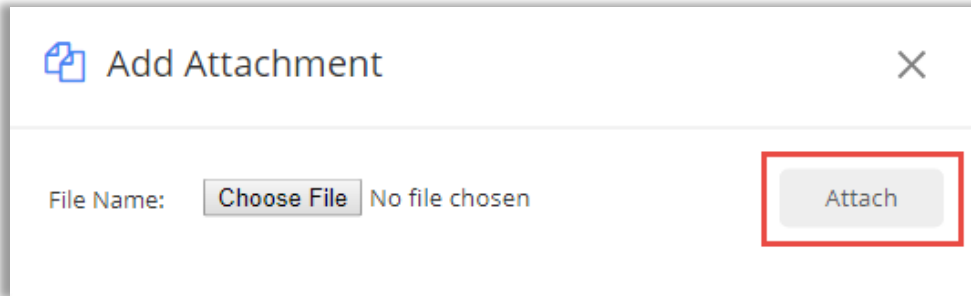
Attachment for Activity

- 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.



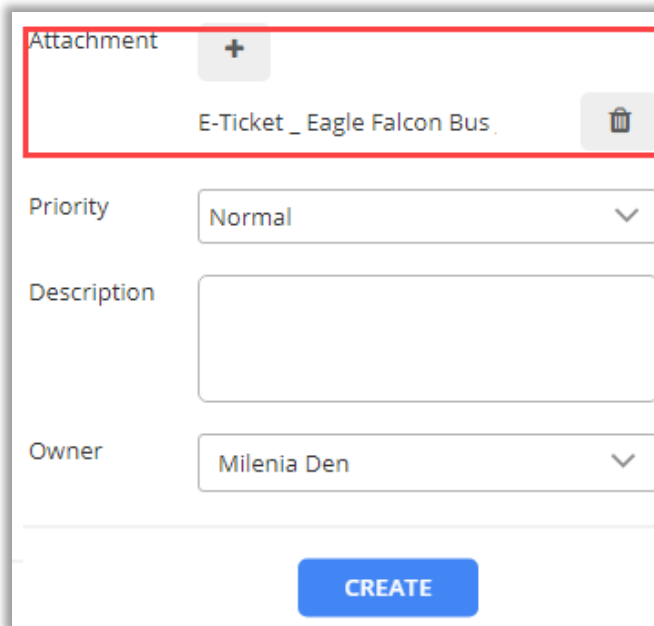
The screenshot shows the 'Create Activity' form. The 'Activity' dropdown is set to 'Appointment'. The 'Subject' field is empty. The 'Regarding' field has a search icon. The 'Start Date' is '12/11/2020 12:00 AM' and the 'End Date' is '12/12/2020 12:00 AM'. The 'All Day Event' checkbox is unchecked. The 'Required' and 'Optional' fields have search icons. The 'Location' field is empty. At the bottom, the 'Attachment' section is highlighted with a red box, showing a '+' icon next to the label. A blue 'CREATE' button is at the bottom right.

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



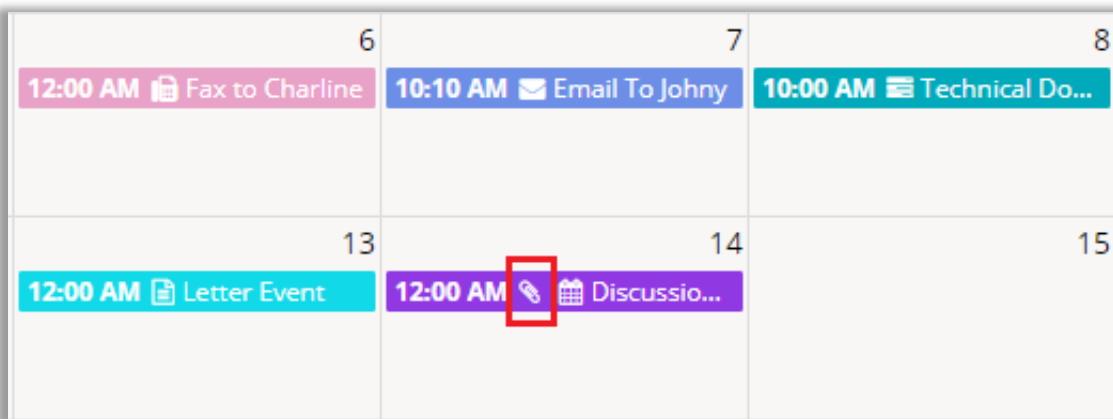
The 'Add Attachment' dialog box features a title bar with a close button (X) and a document icon. Below the title bar, there is a 'File Name:' label, a 'Choose File' button, and the text 'No file chosen'. To the right, the 'Attach' button is highlighted with a red rectangular border.

- 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.



The 'Create Activity' dialog box contains an 'Attachment' section at the top, which is highlighted with a red border. This section includes a plus icon, the text 'E-Ticket _ Eagle Falcon Bus', and a delete icon. Below this, there are fields for 'Priority' (set to 'Normal'), 'Description' (an empty text area), and 'Owner' (set to 'Milenia Den'). A blue 'CREATE' button is located at the bottom of the dialog.

- 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.

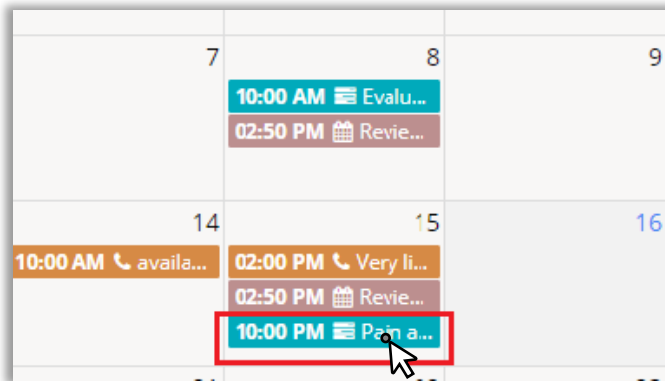


A calendar grid showing activities for days 6, 7, 8, 13, 14, and 15. Each activity is represented by a colored bar with a time slot, an icon, and a title. The activity on day 14 at 12:00 AM, titled 'Discussio...', is highlighted with a red box around its icon, which represents an attachment.

Day	Time	Activity
6	12:00 AM	Fax to Charline
7	10:10 AM	Email To Johny
8	10:00 AM	Technical Do...
13	12:00 AM	Letter Event
14	12:00 AM	Discussio...
15		

View & Manage 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:

Task

Excel Data Update

...

Due Date:

1/16/2020 10:00 AM

Owner:

Jhonson Nick

Priority:

Normal

Regarding:

Alex Simmons

Start Date:

1/16/2020 9:00 AM

MARK AS COMPLETE

MARK AS CANCEL


CONVERT TO OPPORTUNITY

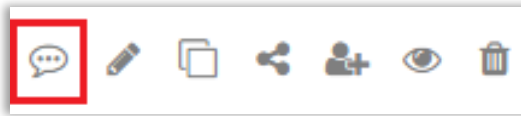
CONVERT TO CASE



- 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.



 Notes 

Title

Enter a note

File Name:

No file chosen

sd


cvbnm

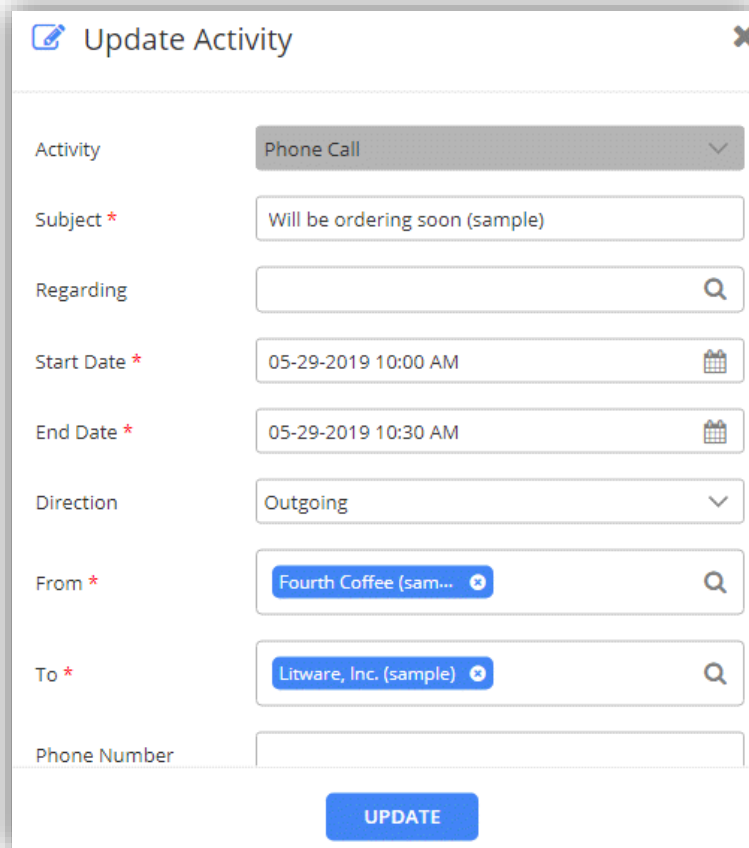
Jhonson Nick - 1/6/2020 2:42 PM

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

Note: All the CRM users can check and add notes.

Edit Activity

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

A modal dialog box titled "Update Activity" with a close button (X) in the top right corner. The form contains the following fields:

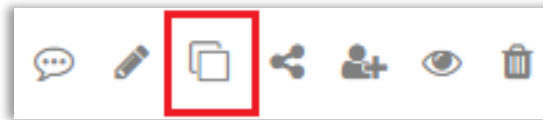
- Activity: A dropdown menu showing "Phone Call".
- Subject *: A text input field containing "Will be ordering soon (sample)".
- Regarding: A text input field with a search icon on the right.
- Start Date *: A date and time picker showing "05-29-2019 10:00 AM".
- End Date *: A date and time picker showing "05-29-2019 10:30 AM".
- Direction: A dropdown menu showing "Outgoing".
- From *: A contact selection field showing "Fourth Coffee (sam..." with a search icon.
- To *: A contact selection field showing "Litware, Inc. (sample)" with a search icon.
- Phone Number: An empty text input field.



At the bottom of the dialog is a blue button labeled "UPDATE".

- 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.



 **Copy Activity** 

Activity

Service Activity

Subject *

ServiceAct1

Service *

Service 01

Regarding

Customers

Resources

Start Date *

07-16-2019 12:00 AM

End Date *

07-17-2019 12:00 AM

Location

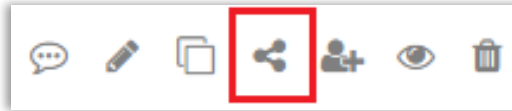
Enter a location

CREATE

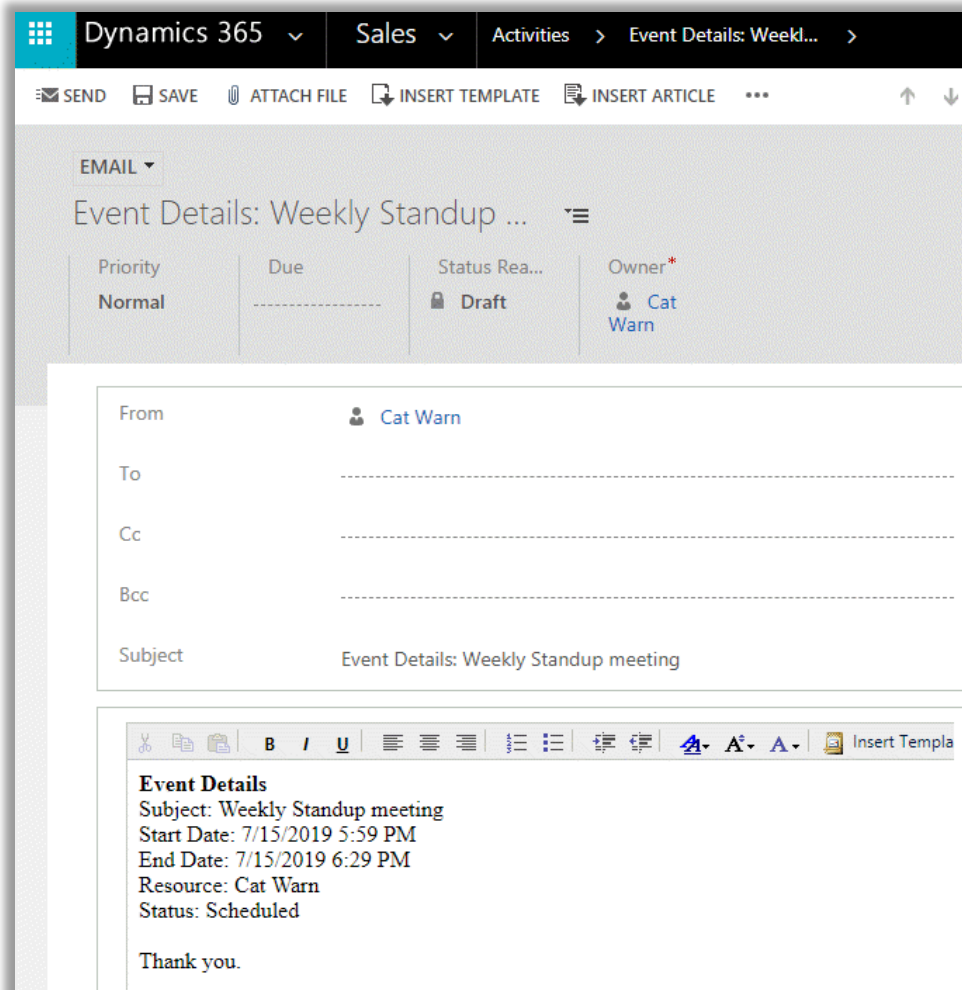
- Click on **Create** button to complete the activity creation. If you don't edit and save it as it is, it would create a duplicate of the activity.

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.

The screenshot shows the Dynamics 365 interface for composing an email. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Activities > Event Details: Weekl...'. Below this is a toolbar with 'SEND', 'SAVE', 'ATTACH FILE', 'INSERT TEMPLATE', and 'INSERT ARTICLE'. The email header shows 'EMAIL' as the selected format, the title 'Event Details: Weekly Standup ...', and a hamburger menu. The header fields include 'Priority: Normal', 'Due: -----', 'Status Rea...: Draft', and 'Owner*: Cat Warn'. The email body fields are 'From: Cat Warn', 'To: -----', 'Cc: -----', 'Bcc: -----', and 'Subject: Event Details: Weekly Standup meeting'. At the bottom is a rich text editor with a toolbar and the following content:



Event Details
Subject: Weekly Standup meeting
Start Date: 7/15/2019 5:59 PM
End Date: 7/15/2019 6:29 PM
Resource: Cat Warn
Status: Scheduled

Thank you.

Re-assigning Activity

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



 **Reassign Event** 

Event Type


Phone Call


Subject

Discuss new opportunity (sample)

Description

User/Team *

Mark Carlos 

Search 

Users

☒ Mark Carlos

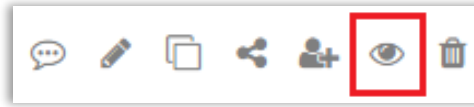
☐ Rene Carlos

- 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.



✓ MARK COMPLETE ✕ CLOSE TASK PROCESS CONVERT TO ✕ DELETE EMAIL A LINK ...

TASK ▼

Technical analysis & Product en... ☰

Priority	Due	Activity Status*	Owner*
Normal	11/21/2019 6:00 PM	Open	Juan Carlos

Subject* Technical analysis & Product enhancement

Description

Technical analysis & Product enhancement

Regarding Hi-rod pneumatics Pvt. Ltd.

Duration

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.

Task

Technical analysis & Product enhancement

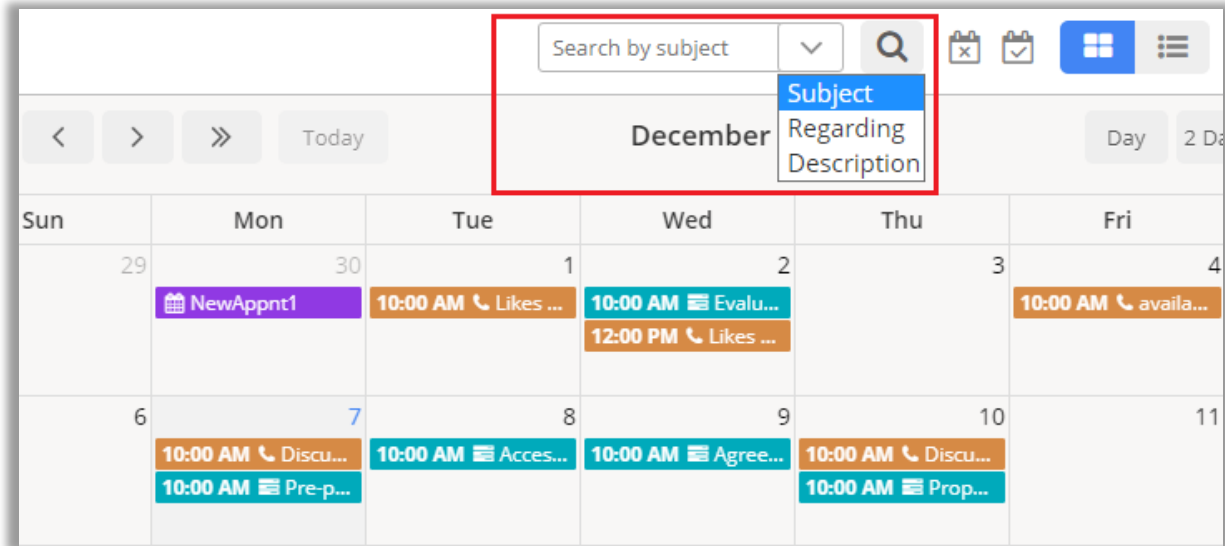
Warning

Do you really want to delete this activity?

OK CLOSE

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

+

Create Activity

×

Activity

Recurring Appointment

▼

Subject *

Development Review & Discussion

Regarding

Hi-rod pneumatics ...

+

Q

Required

Jim Glynn (sample)

+

Maria Campbell (sa...

+

Nancy Anderson (s...

+

Juan Carlos

+

Q

Optional

Q

Location

St. George, UT, USA

Set Recurrence

Priority

Normal

▼

CREATE

- 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.

Set Recurrence

Appointment Time

Start: 2:00 PM

End: 6:30 PM

Recurrence Pattern Weekly

Recur Every 1 Week(s) On:

☐ Sunday ☒ Monday ☐ Tuesday ☐ Wednesday

☐ Thursday ☐ Friday ☐ Saturday

Range of Recurrence

Start range: 12-02-2019

End range:

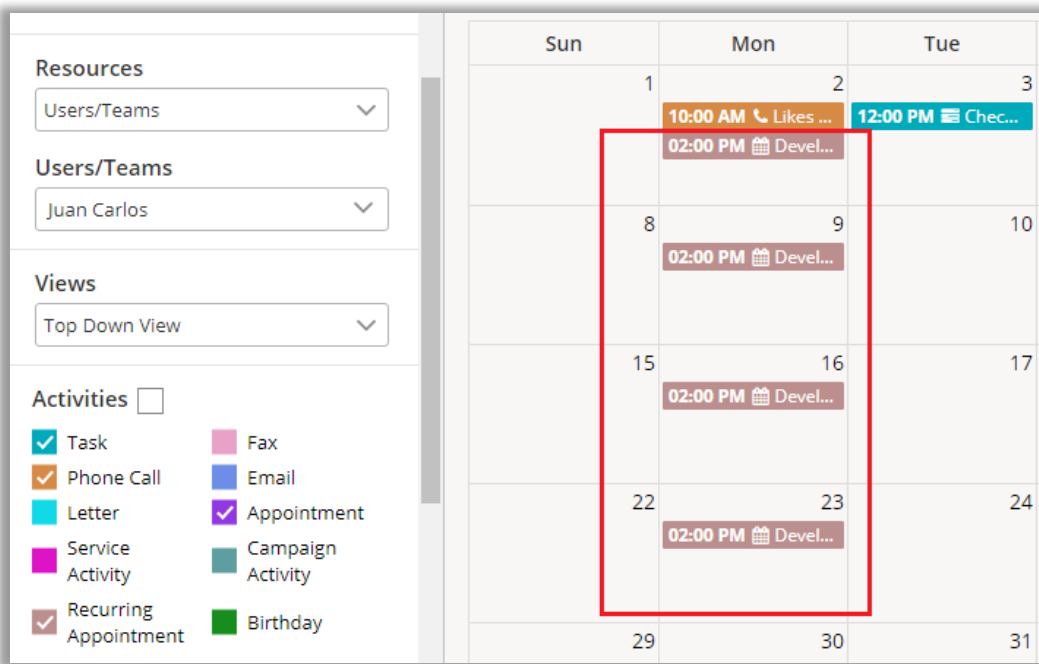
☐ No End Date

☒ End after 4 occurrences

☐ End by 12-03-2019

Set Cancel

- 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 Range:** 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.

The 'Create Activity' dialog box is shown. It has fields for Activity (Appointment), Subject (Appointment with Client), Regarding (Fabrikam, Inc.), Start Date (07-12-2018 12:00 AM), and End Date (07-13-2018 12:00 AM). Below these, there are sections for Required and Optional resources. The Required section lists Maria Campbell and Nancy Anderson. The Optional section lists Counts Vong (samp...) and Debra Garcia (sam...). The Location field is set to Client's Place. An OK button is at the bottom.

- 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.

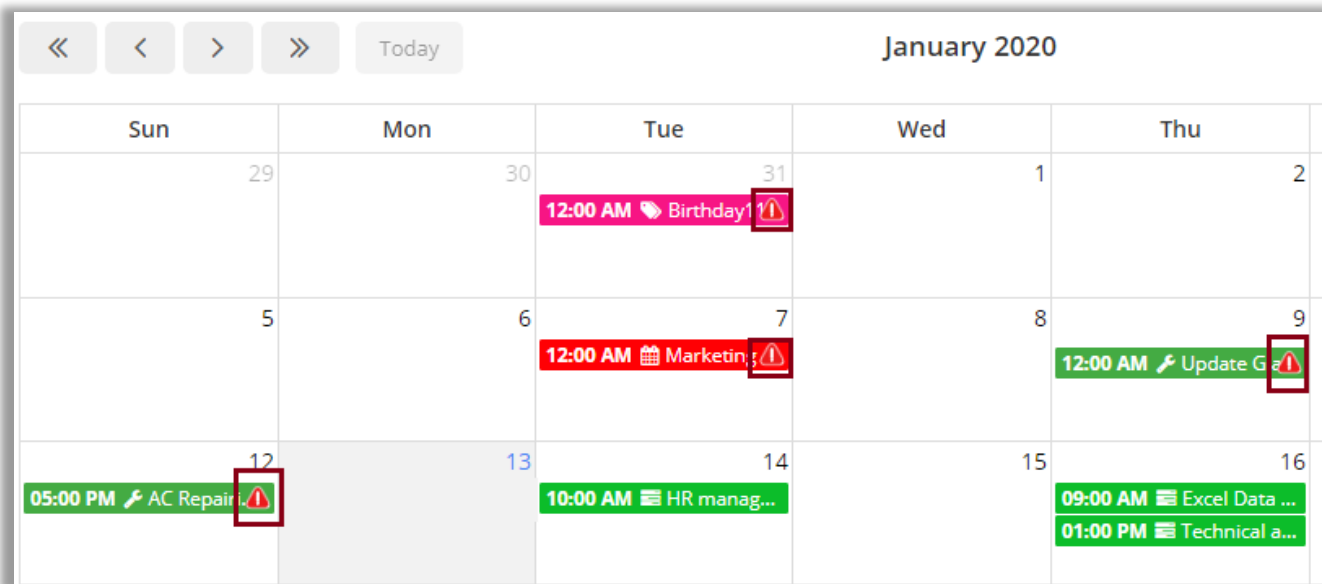
Overdue Activities

- You can configure 'Overdue Activities' by selecting 'Yes'.

Overdue Activities ?	Yes ▼
Contact Calendar ?	Yes
	No

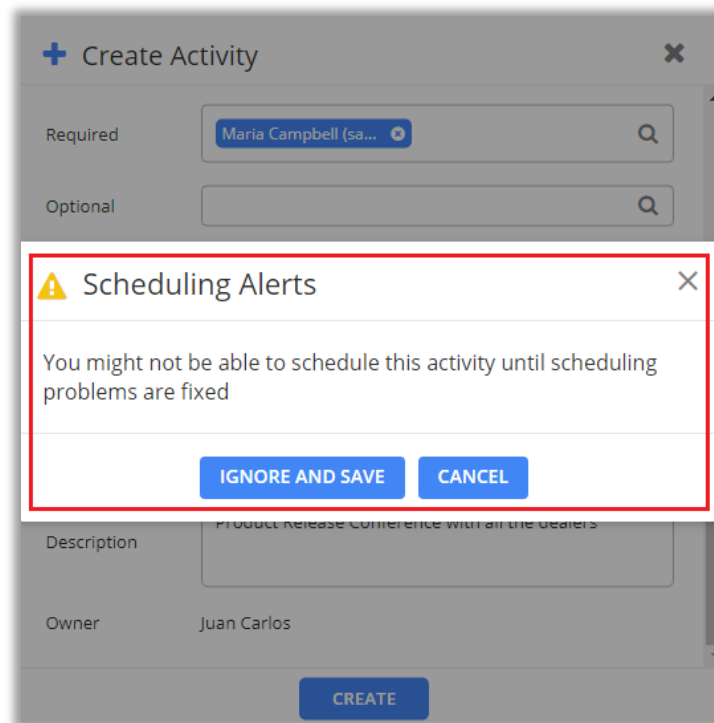
Overdue activity on Calendar

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

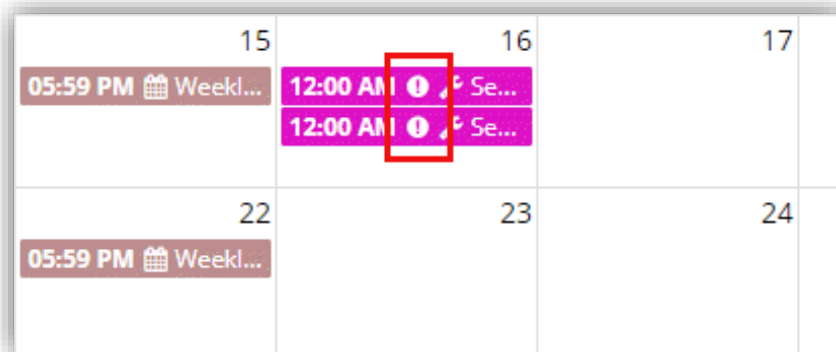


Conflict Management

- 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.



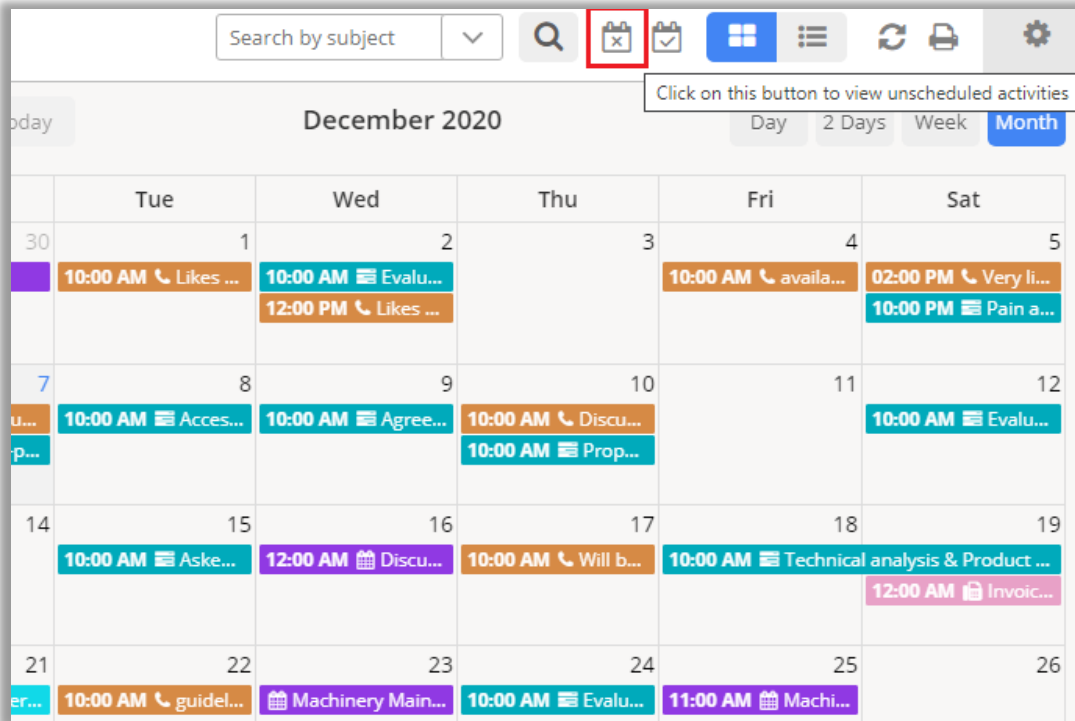
- On clicking **Ignore and Save** button, activity gets saved but with conflicting error message on the activity. Clicking **Cancel** button, scheduling gets cancelled and you again get to re-schedule date and time of the activity.



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.

Unscheduled Activities
✕

Start Date

12-01-2020

End Date

12-31-2020

Activity Type

Appointment

Set Required

Search:

Select	Subject	Start Date	End Date	Owner	Status
<input type="checkbox"/>	Discussion of requirement	12/16/2020 12:00 AM	12/17/2020 12:00 AM	Milenia Den	Scheduled
<input type="checkbox"/>	Machinery Replacement	12/25/2020 11:00 AM	12/25/2020 1:00 PM	Milenia Den	Scheduled
<input type="checkbox"/>	Meeting	12/30/2020 12:00 AM	12/31/2020 12:00 AM	Milenia Den	Scheduled

Showing 1 to 3 of 3 entries
1


- 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.

Select	Subject	Start Date	End Date	Owner	Status
<input checked="" type="checkbox"/>	AC Services	11/21/2019 1:00 PM	11/21/2019 3:00 PM	Juan Carlos	Scheduled

- 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.

 Set resource for service activities

Resource *

SAVE









CLOSE

Print Calendar

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

Search by subject

▼

>>
Today

December 2020

Day
2 Days
Week
Month

Mon	Tue	Wed	Thu	Fri	Sat
30 NewAppnt1	1 10:00 AM ☎ Likes ...	2 10:00 AM 📄 Evalu... 12:00 PM ☎ Likes ...	3	4 10:00 AM ☎ availa...	5 02:00 PM ☎ Very li... 10:00 PM 📄 Pain a...
7 10:00 AM ☎ Discu... 10:00 AM 📄 Pre-p...	8 10:00 AM 📄 Acces...	9 10:00 AM 📄 Agree...	10 10:00 AM ☎ Discu... 10:00 AM 📄 Prop...	11	12 10:00 AM 📄 Evalu...

- 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.

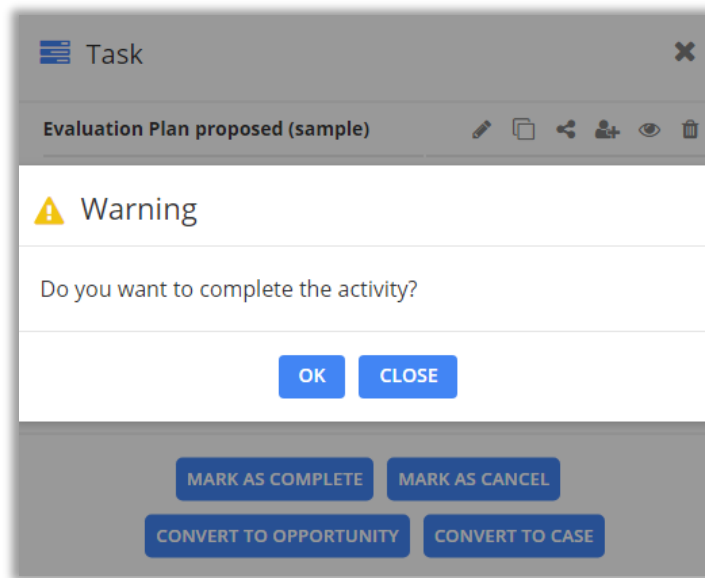
Activity Action

- 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

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.

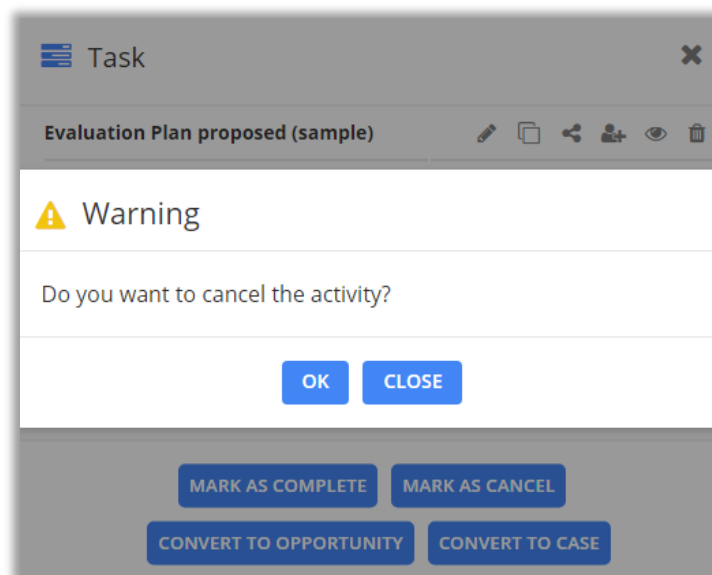
Mark as Complete

- 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**.



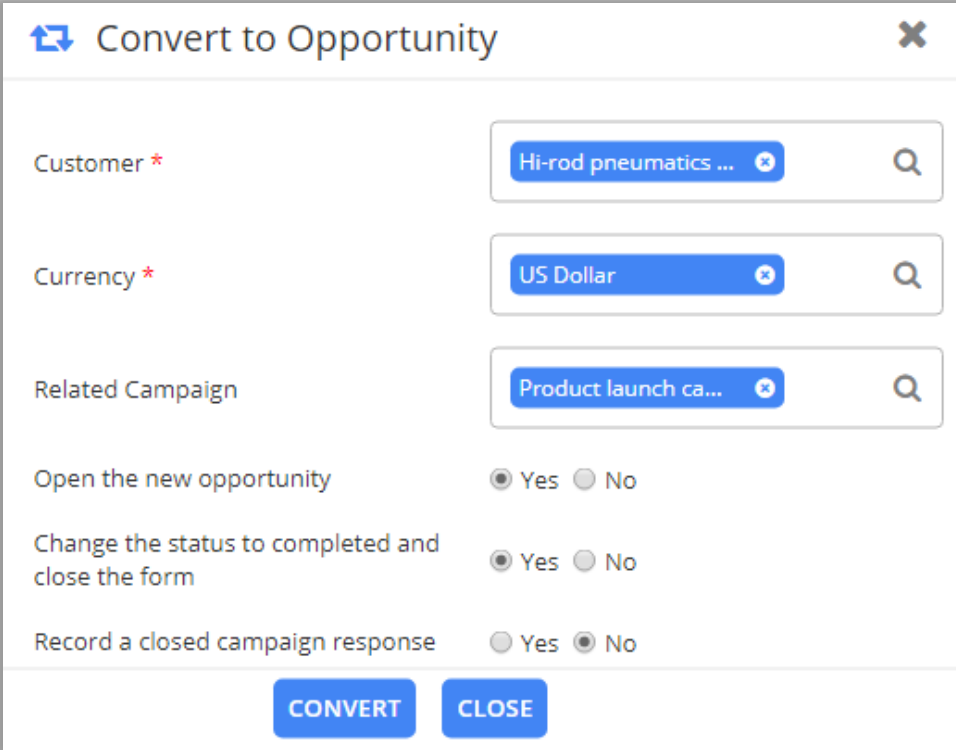
Mark as Cancel

- 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.



The "Convert to Opportunity" dialog box features a title bar with a blue double-arrow icon and a close button. It contains three search fields for "Customer" (with "Hi-rod pneumatics ..."), "Currency" (with "US Dollar"), and "Related Campaign" (with "Product launch ca..."). Below these are three radio button options: "Open the new opportunity" (Yes selected), "Change the status to completed and close the form" (Yes selected), and "Record a closed campaign response" (No selected). At the bottom are "CONVERT" and "CLOSE" buttons.

Convert Activity to Case

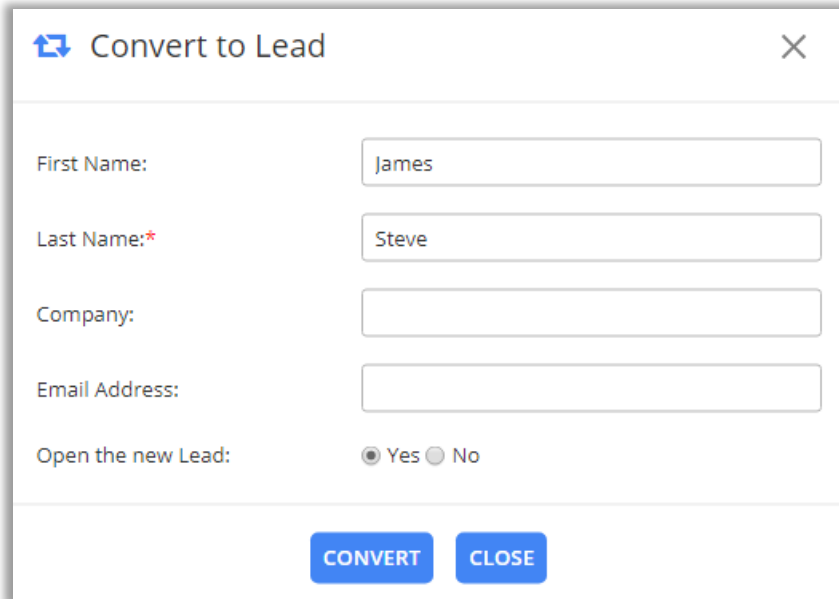
- Activities like Tasks, Phone calls, Letters, Fax, Custom Activities and Emails can be converted to Case from calendar directly.



The "Convert to Case" dialog box features a title bar with a blue double-arrow icon and a close button. It contains two search fields for "Customer" (with "Maria Campbell (sa...") and "Subject" (with "Products"). Below these are two radio button options: "Open the new case" (Yes selected) and "Change the status to completed and close the form" (Yes selected). At the bottom are "CONVERT" and "CLOSE" buttons.

Convert Activity to Lead

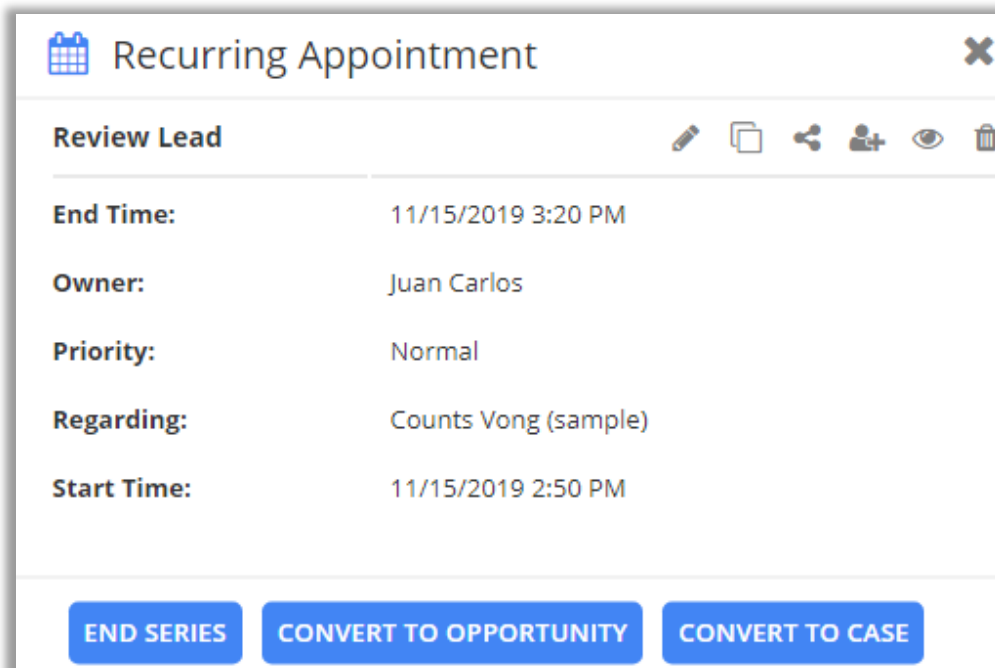
- Only **Email** activities can be converted to lead.



A dialog box titled "Convert to Lead" with a close button (X) in the top right corner. It contains five input fields: "First Name:" with the value "James", "Last Name:*" with the value "Steve", "Company:" (empty), "Email Address:" (empty), and "Open the new Lead:" with radio buttons for "Yes" (selected) and "No". At the bottom are two blue buttons: "CONVERT" and "CLOSE".

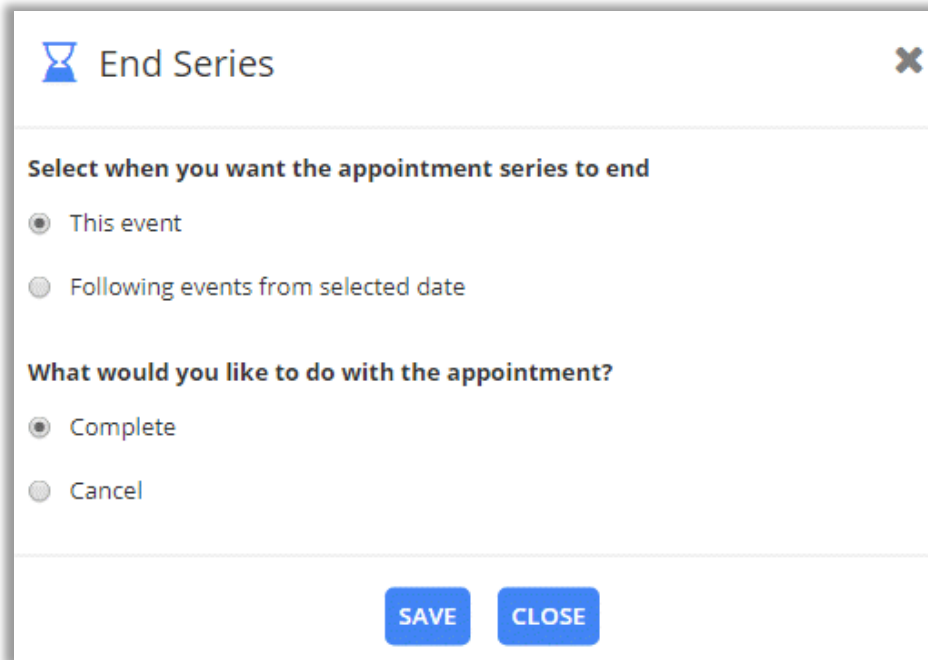
End Series

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



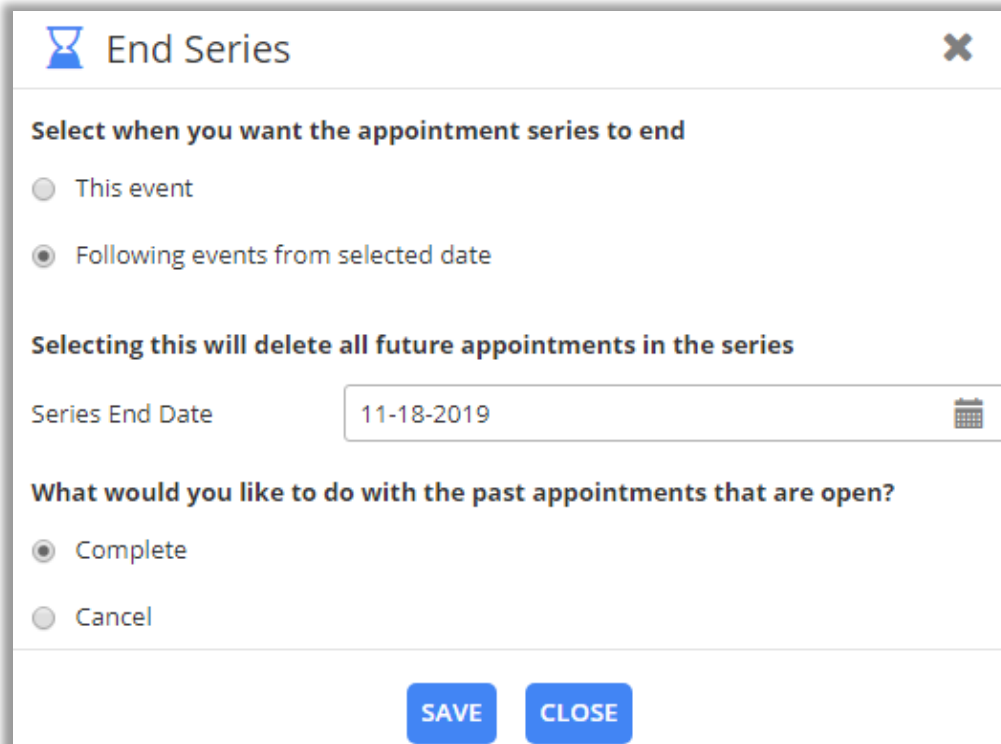
A dialog box titled "Recurring Appointment" with a calendar icon and a close button (X) in the top right corner. Below the title bar is a "Review Lead" section with a toolbar containing icons for edit, copy, share, add, view, and delete. The main area displays appointment details: "End Time:" 11/15/2019 3:20 PM, "Owner:" Juan Carlos, "Priority:" Normal, "Regarding:" Counts Vong (sample), and "Start Time:" 11/15/2019 2:50 PM. At the bottom are three blue buttons: "END SERIES", "CONVERT TO OPPORTUNITY", and "CONVERT TO CASE".

- 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".



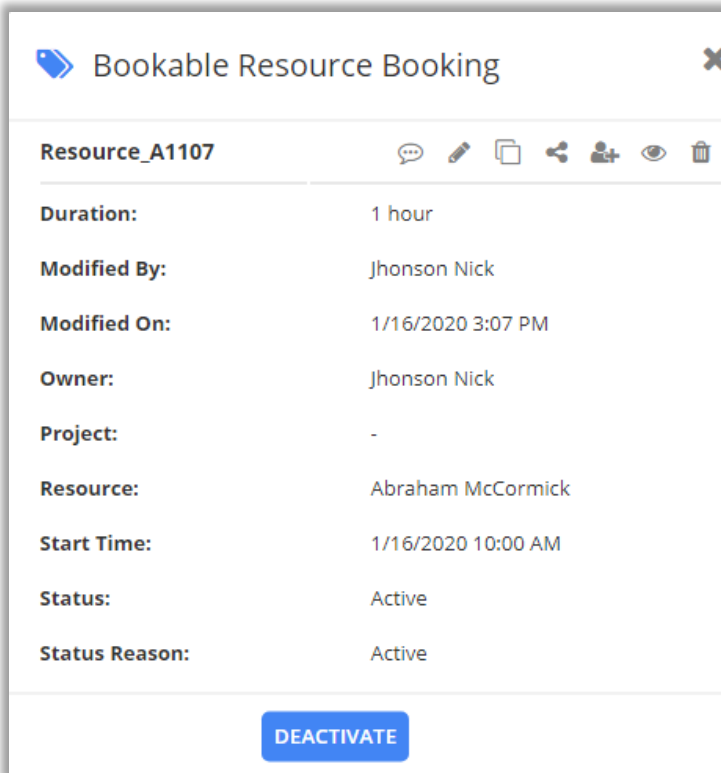
The dialog box is titled "End Series" with a close button (X) in the top right corner. It contains two sections of radio button options. The first section, "Select when you want the appointment series to end", has two options: "This event" (selected) and "Following events from selected date". The second section, "What would you like to do with the appointment?", has two options: "Complete" (selected) and "Cancel". At the bottom are two blue buttons: "SAVE" and "CLOSE".

- 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.



This dialog box is similar to the first one but includes an additional date selection field. The "Following events from selected date" option is selected under the "Select when you want the appointment series to end" section. Below this, a message states: "Selecting this will delete all future appointments in the series". A text field labeled "Series End Date" contains the value "11-18-2019" and has a calendar icon to its right. The "What would you like to do with the past appointments that are open?" section has "Complete" selected. "SAVE" and "CLOSE" buttons are at the bottom.

Deactivate Bookable Resource Booking



Bookable Resource Booking

Resource_A1107

Duration: 1 hour

Modified By: Jhonson Nick

Modified On: 1/16/2020 3:07 PM

Owner: Jhonson Nick

Project: -

Resource: Abraham McCormick

Start Time: 1/16/2020 10:00 AM

Status: Active

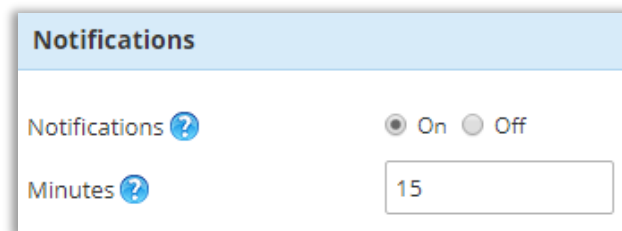
Status Reason: Active

DEACTIVATE

- 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:

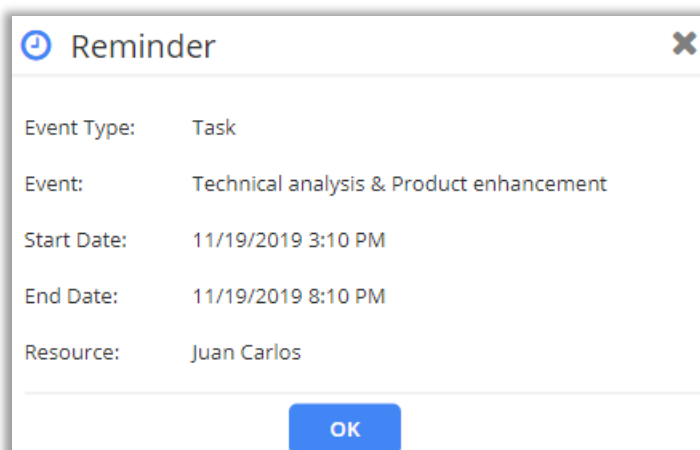
- You will receive a notification for reminder of the activity before few minutes from the start time of the activity set from the backend default configurations.



Notifications

Notifications ? ☒ On ☐ Off

Minutes ?



Reminder

Event Type: Task

Event: Technical analysis & Product enhancement

Start Date: 11/19/2019 3:10 PM

End Date: 11/19/2019 8:10 PM

Resource: Juan Carlos

OK

Calendar Views

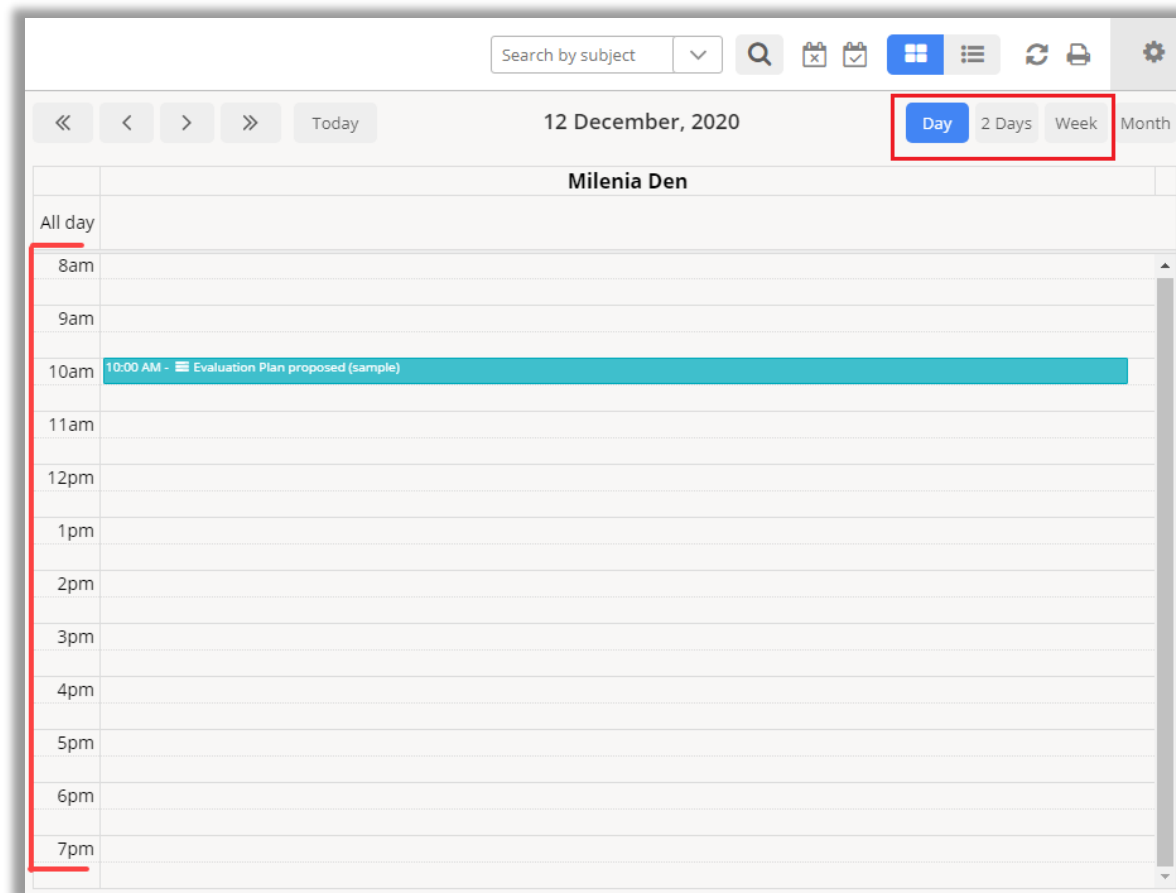
- There are multiple views are given in the Calendar 365 to check the activities and as per the schedule.

Time Slot Duration View

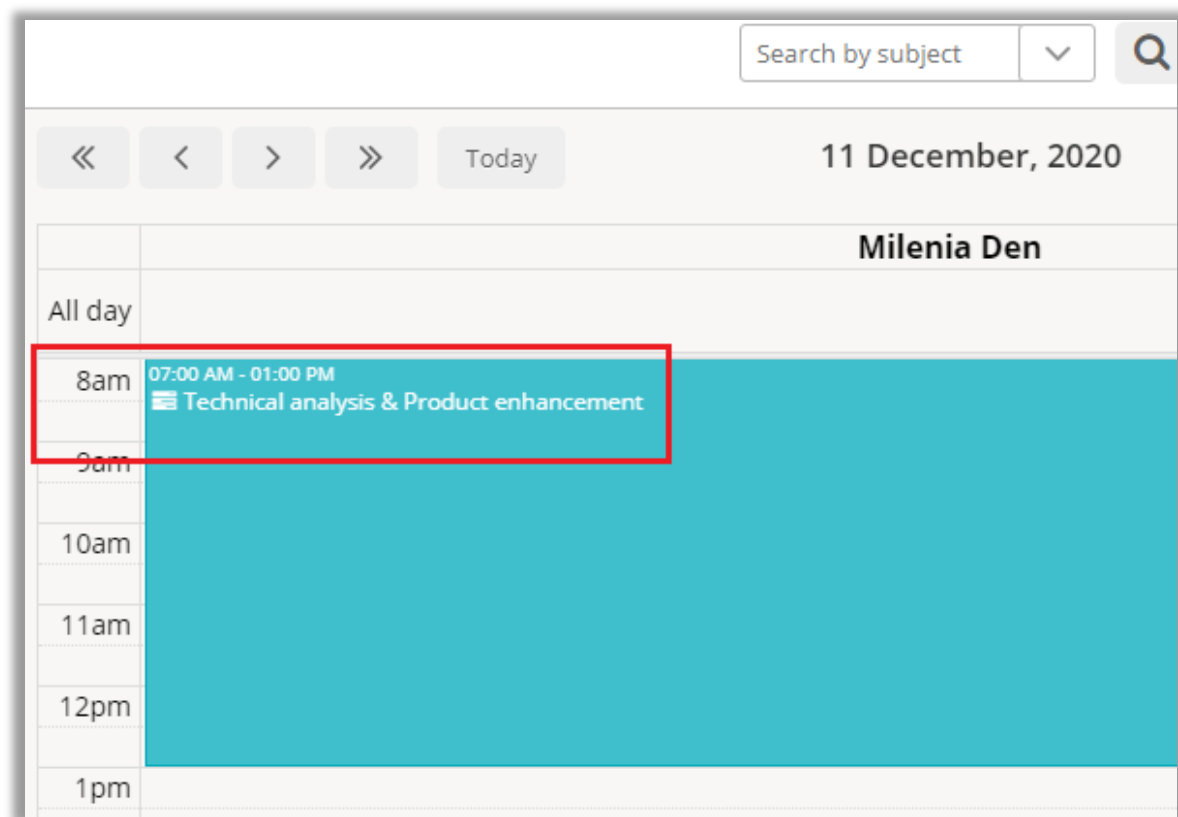
- If you have set the “Minimum” & “Maximum” time slots from the default configuration of Calendar 365, the users will see the working Time slots on the Calendar page.

Minimum Duration ?	08	▼
Maximum Duration ?	20	▼

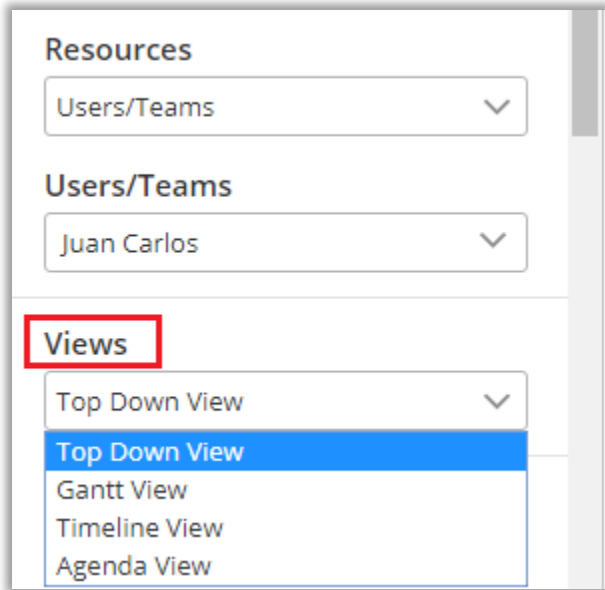
- The Time slot duration can only be seen for Days & Weeks. By setting the time slots, you can decide the availability and working time for any activity.



- Suppose if any activity added before the time slot or after the time slot, it will allow and display the time with the activity title .



- The individual different Views also provided to check the calendar activities and plan accordingly.



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

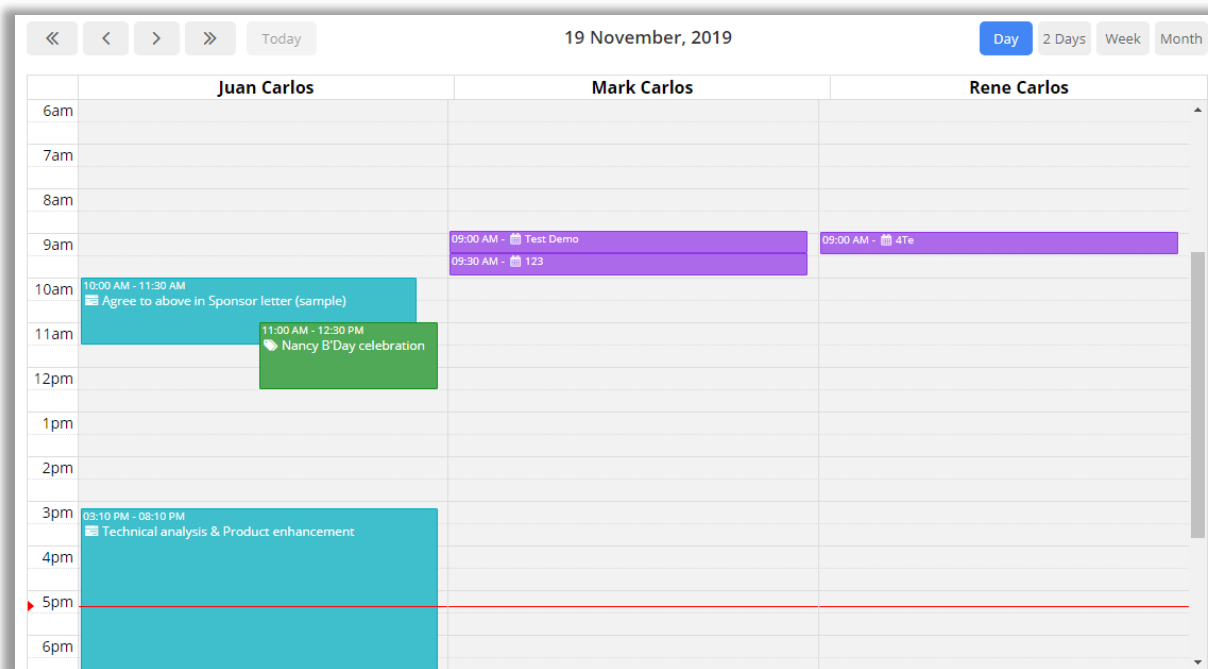
Note: You can check all Calendar Views in Resource Calendar and Customer Calendars individually.

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.

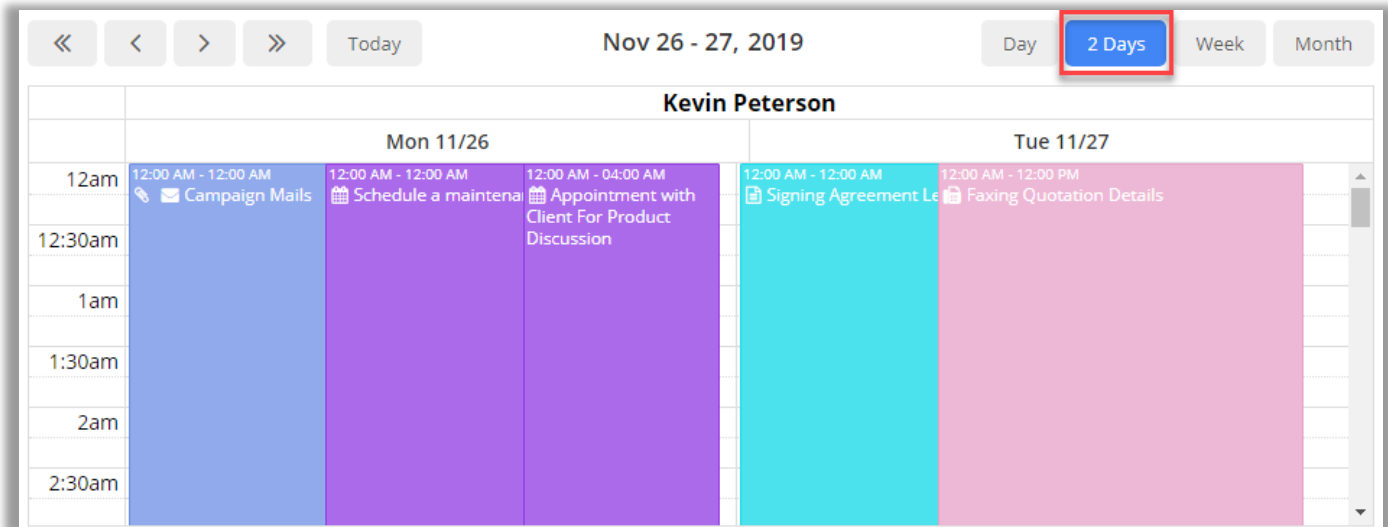
Day View:

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

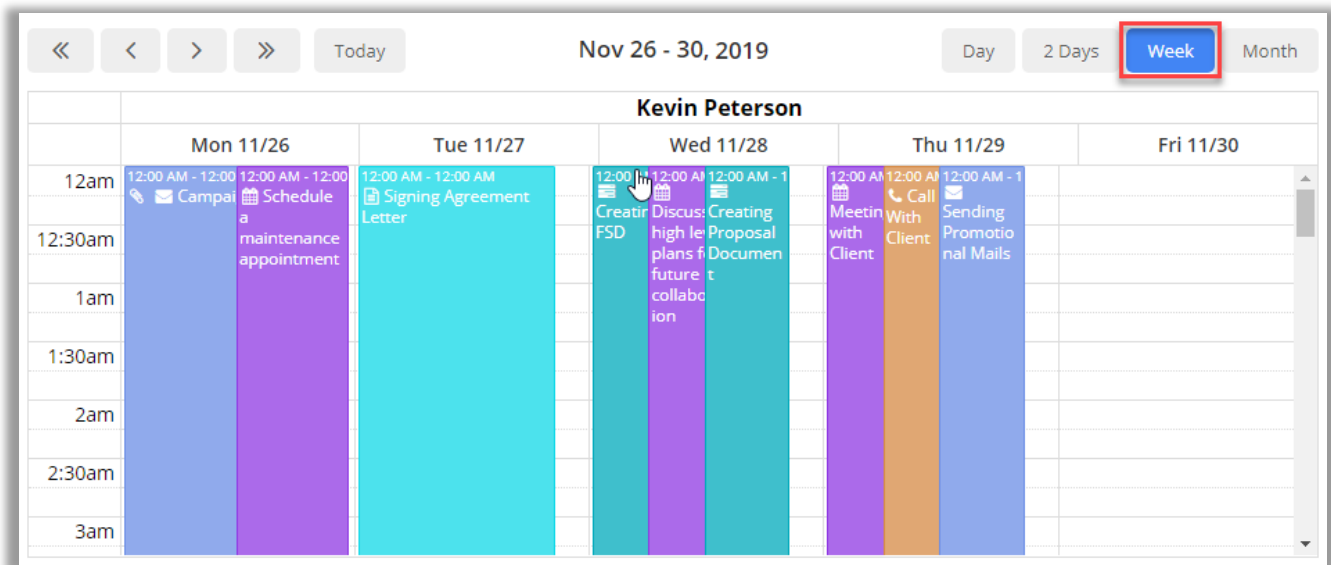


Day Span View:

- 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.



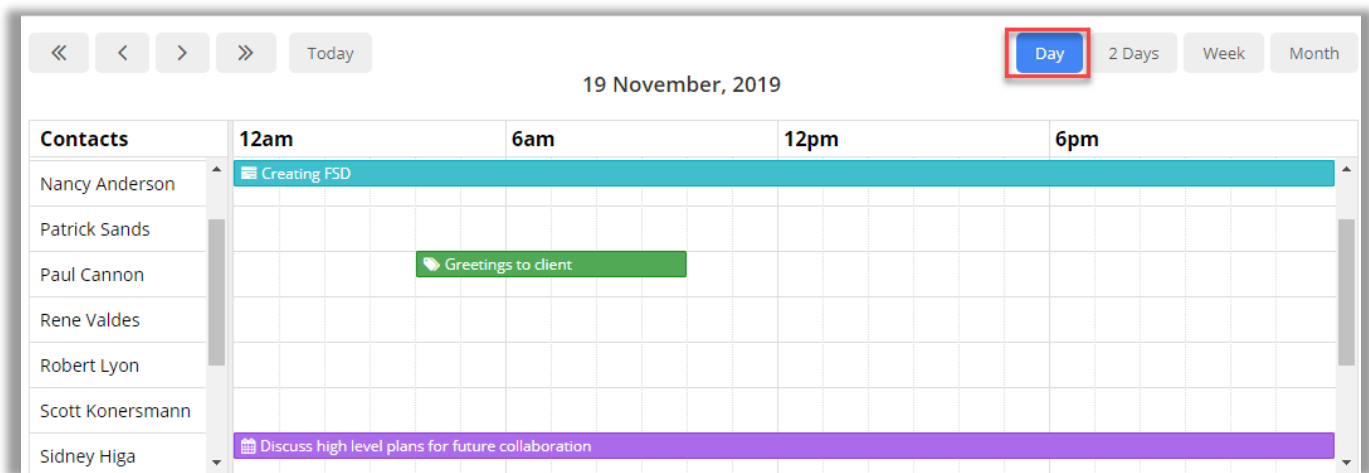
- Similarly, in Month View, you will the details month wise with the dates.

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.

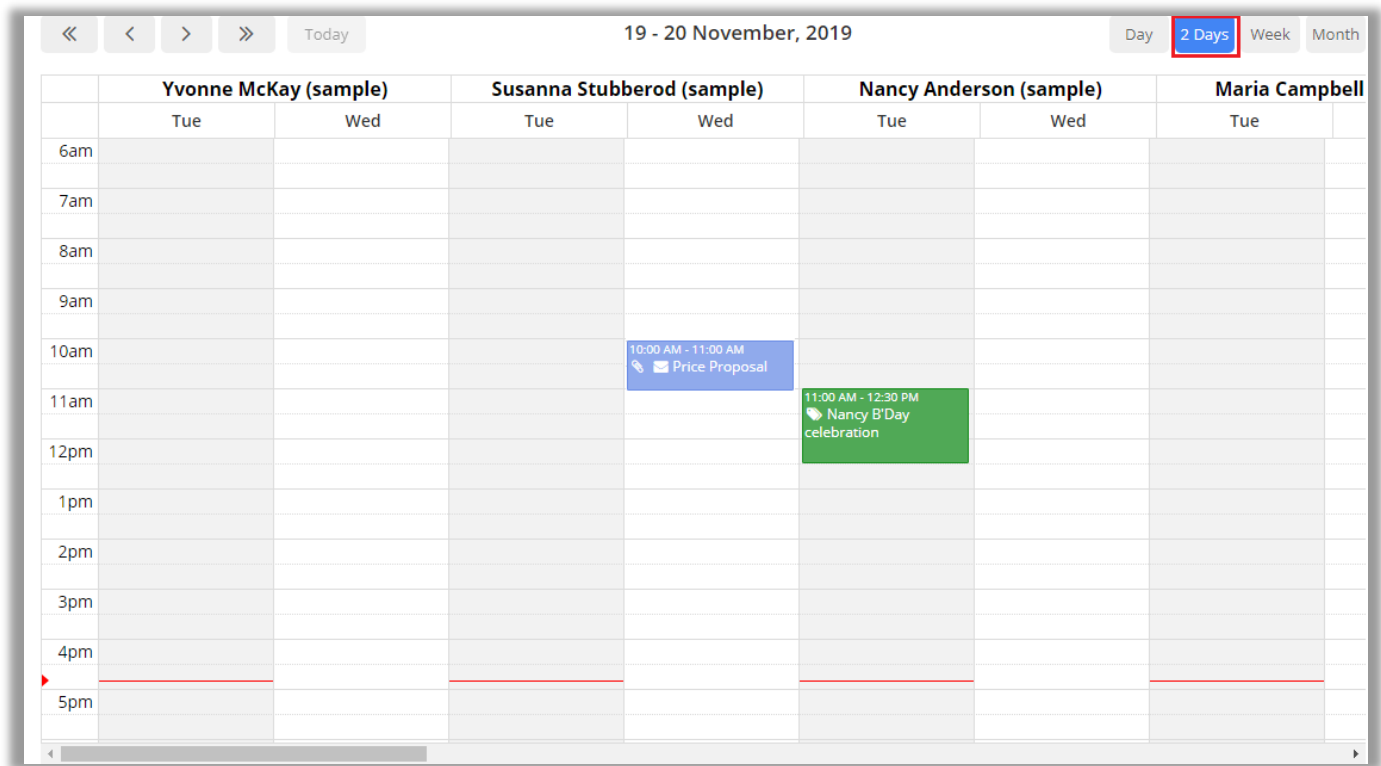
Day View:

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



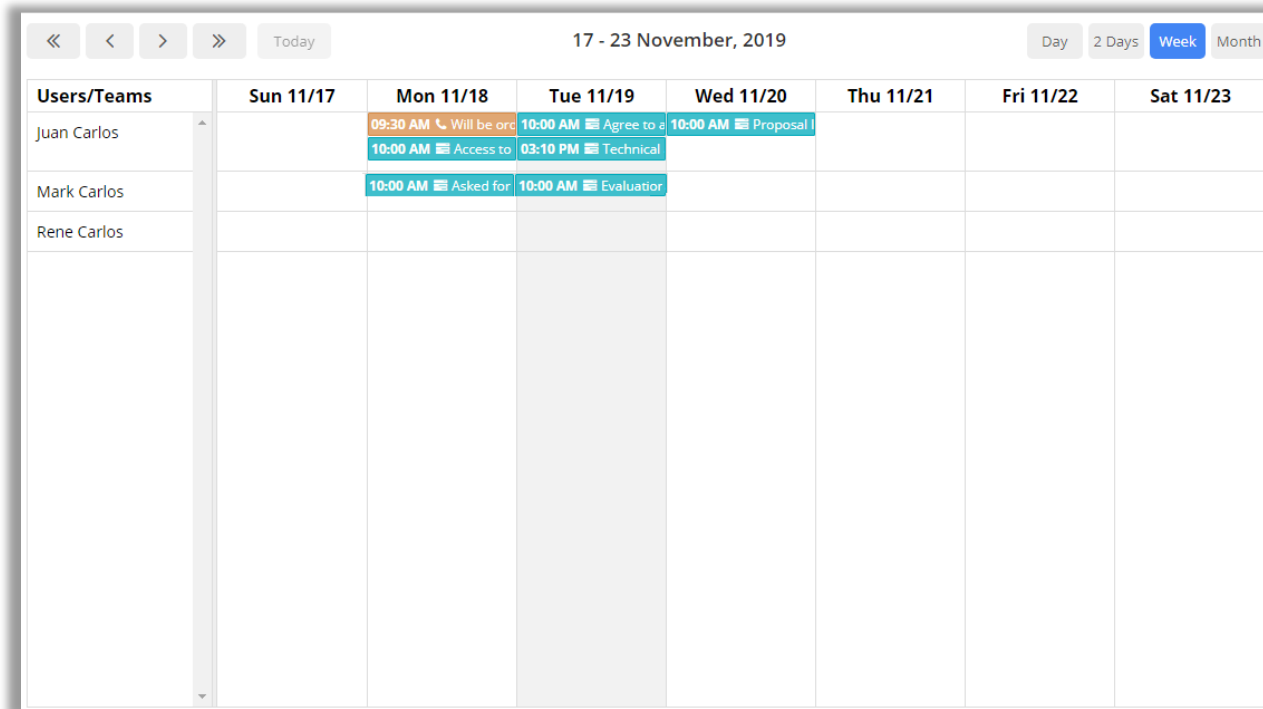
Day Span View:

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

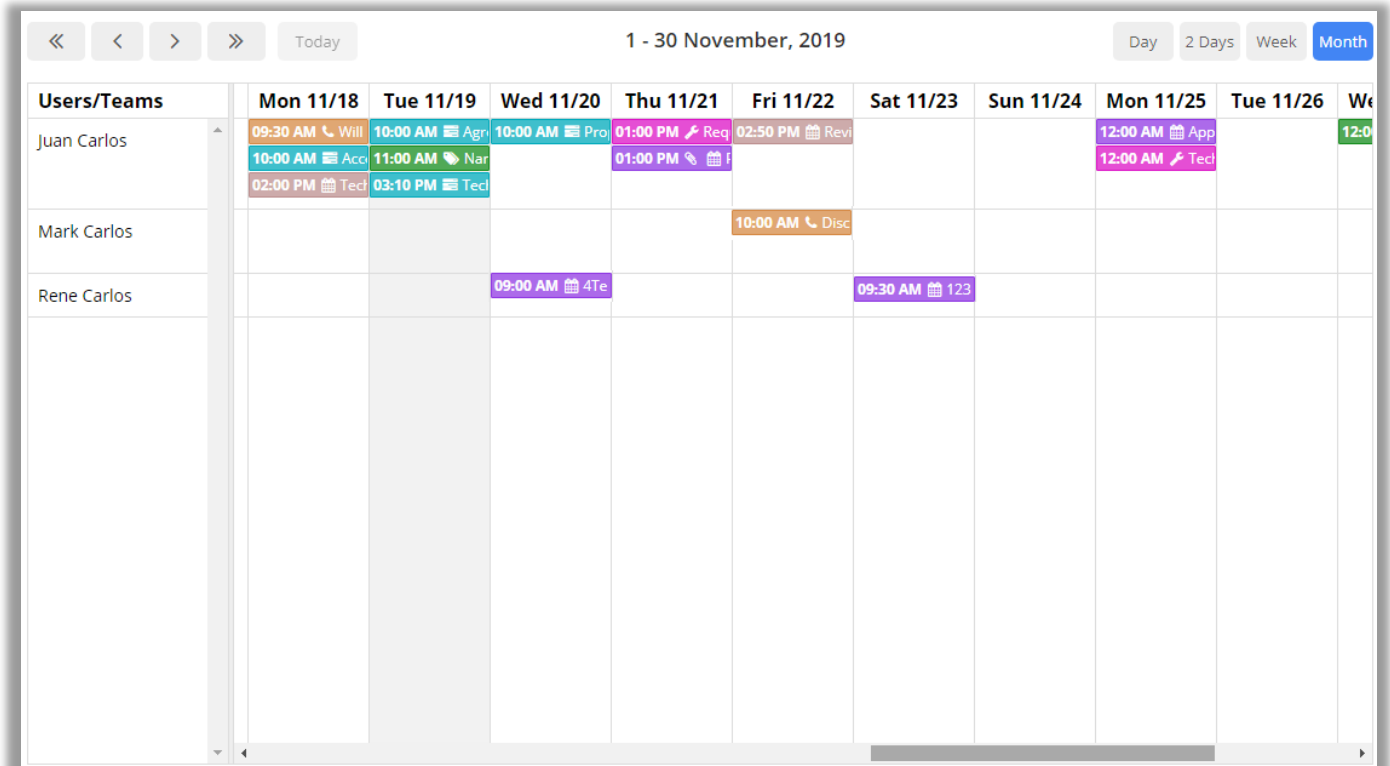


Week View:

- 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.

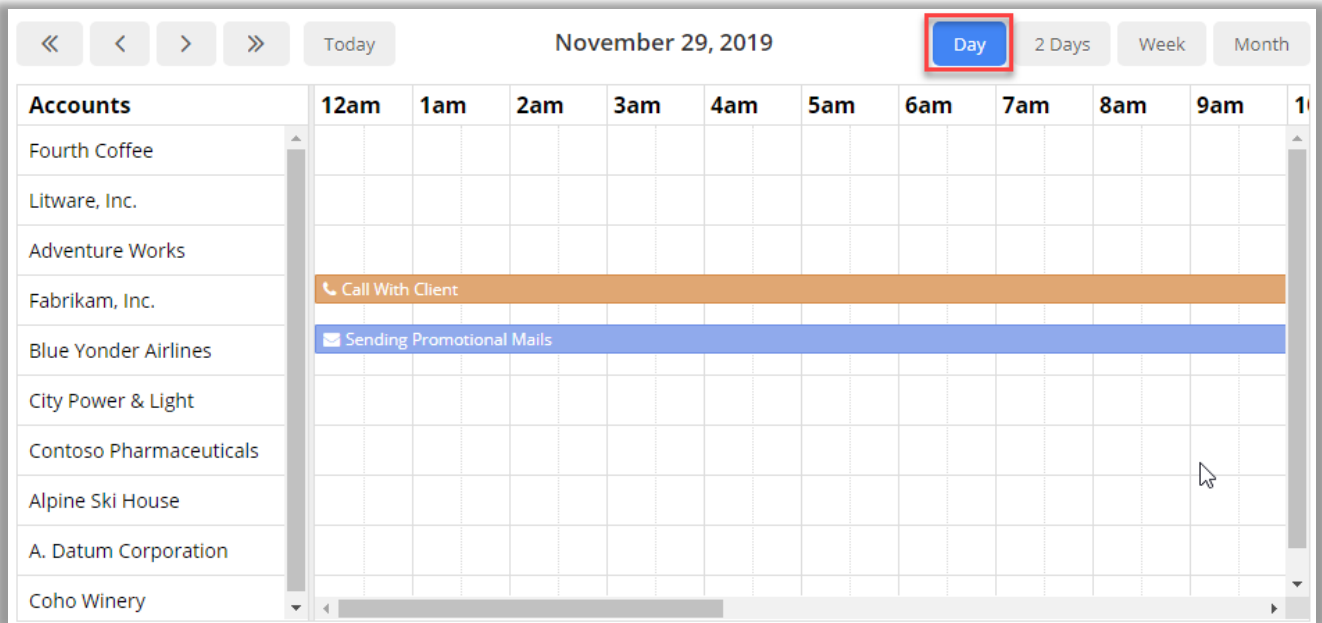


Timeline View

- 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.

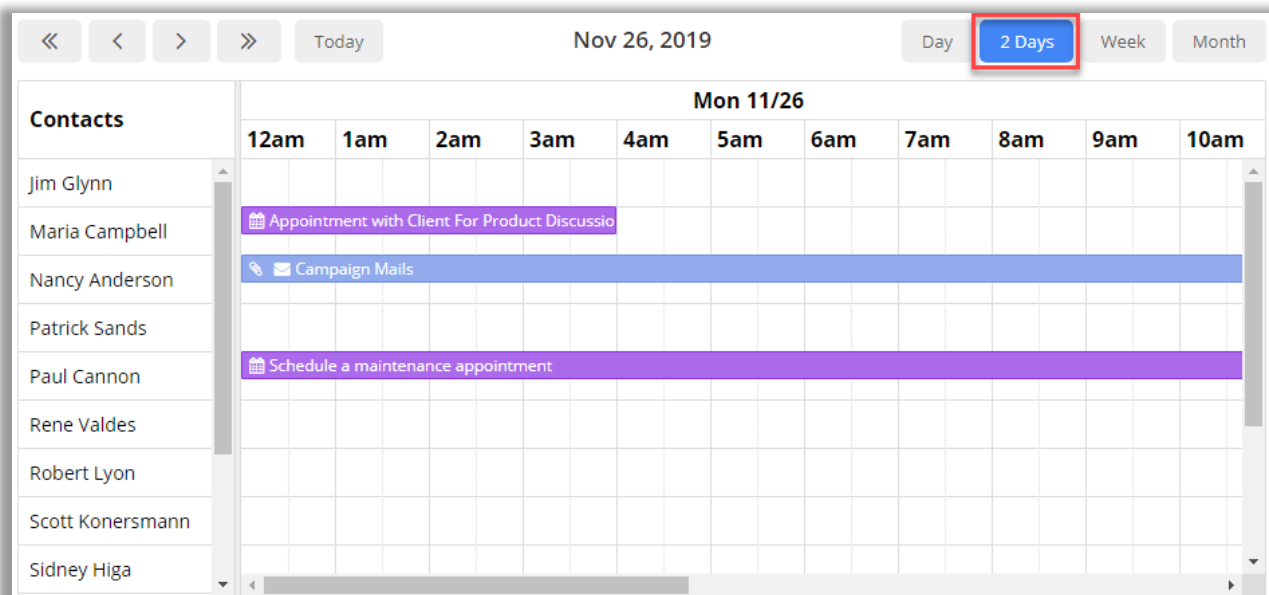
Day View:

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



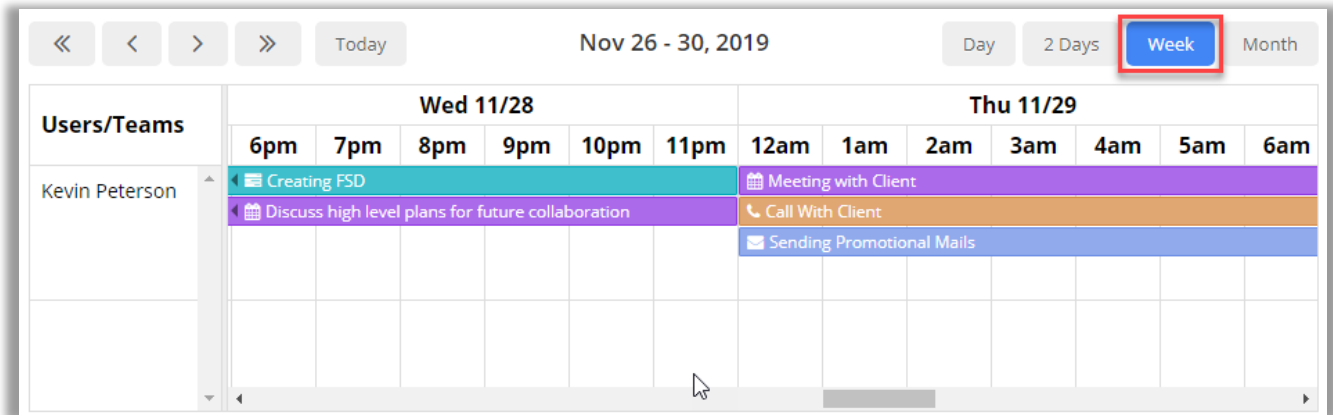
Day Span View

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

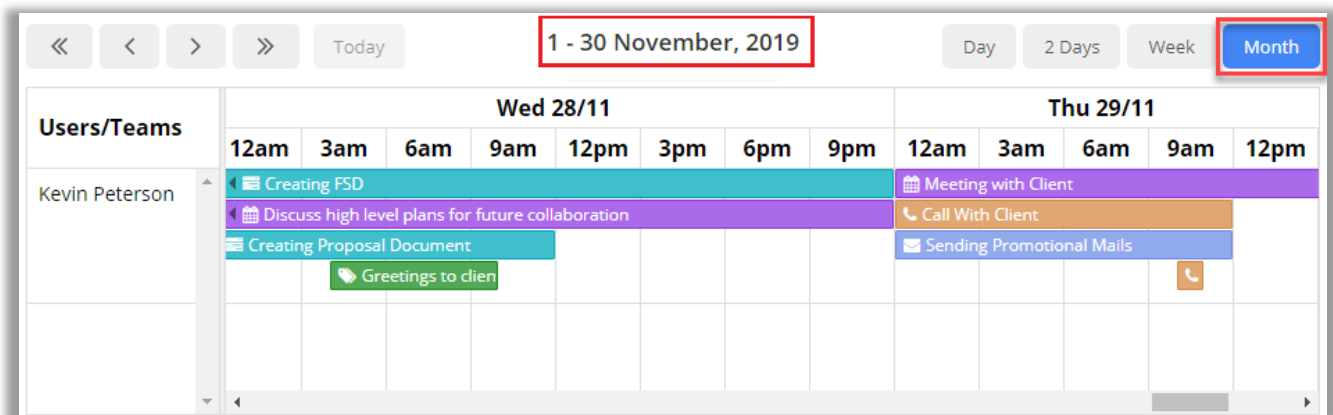


Week View:

- 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.

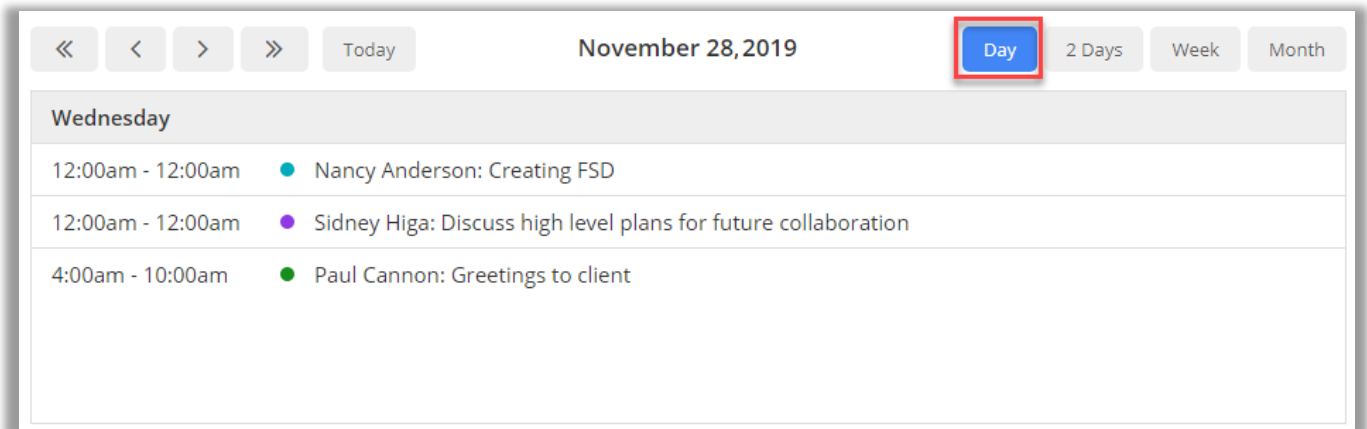


Agenda View

- 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.

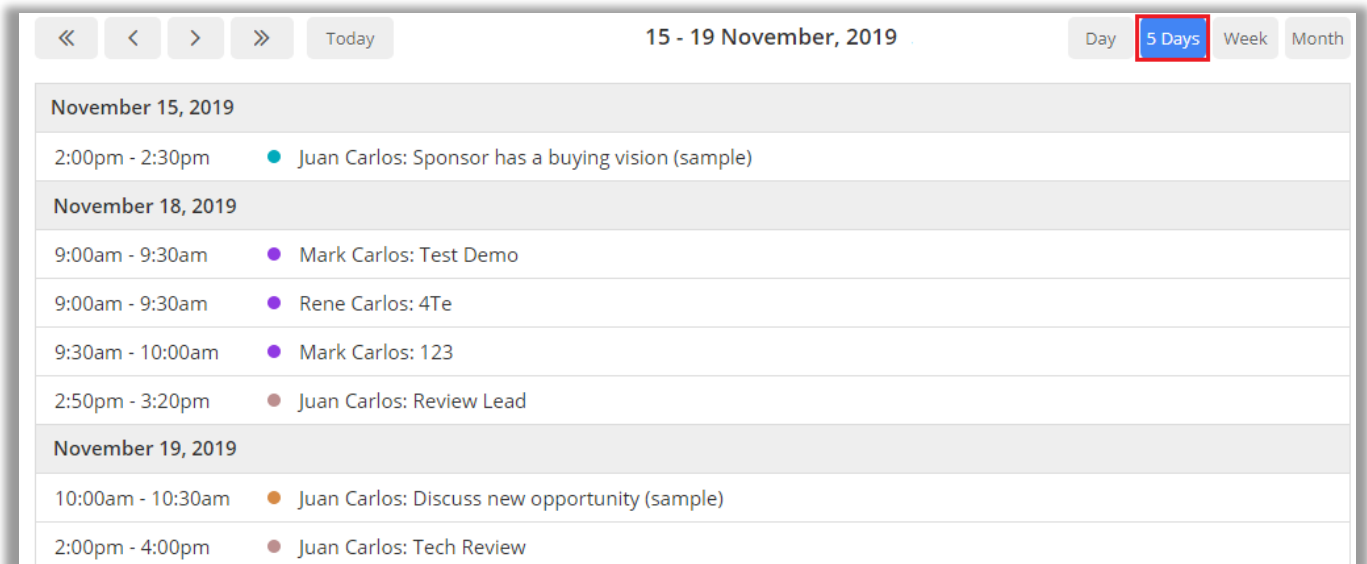
Day View:

- 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.

«	<	>	»	Today	17 - 23 November, 2019	Day	5 Days	Week	Month
Monday					November 18, 2019				
9:30am - 10:30am					● Juan Carlos: Will be ordering soon (sample)				
10:00am - 10:30am					● Juan Carlos: Access to power negotiated (sample)				
2:00pm - 4:00pm					● Juan Carlos: Tech Review				
Tuesday					November 19, 2019				
9:00am - 9:30am					● Mark Carlos: Test Demo				
9:00am - 9:30am					● Rene Carlos: 4Te				
9:30am - 10:00am					● Mark Carlos: 123				
Wednesday					November 20, 2019				
10:00am - 10:30pm					● Juan Carlos: Proposal Issue, Decision Due (sample)				
Thursday					November 21, 2019				
1:00pm - 3:00pm					● Juan Carlos: Requirement Together				
1:00pm - 2:00pm					● Juan Carlos: Product Release meeting				
Friday					November 22, 2019				
2:50pm - 3:20pm					● Juan Carlos: Review Lead				

Month View:

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

«	<	>	»	Today	1 - 30 November, 2019	Day	5 Days	Week	Month
November 5, 2019					Tuesday				
10:00am - 1:00pm					● Maria Campbell (sample): List of upcoming Technical Events				
November 15, 2019					Friday				
10:00pm - 10:30pm					● Maria Campbell (sample): Pain admitted by sponsor (sample)				
November 19, 2019					Tuesday				
11:00am - 12:30pm					● Nancy Anderson (sample): Nancy B'Day celebration				
November 28, 2019					Thursday				
10:00am - 11:00am					● Maria Campbell (sample): Price Proposal				

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.

The screenshot displays the Dynamics 365 Resource Scheduler interface. The left sidebar shows the navigation menu with options like Home, Recent, Pinned, and a list of calendars including Resource Calendar. The main area shows a calendar for May 2020, with the 15th highlighted. Below the calendar, there are filters for Resources (Users/Teams), Users/Teams (Hellen Turner), Views (Resource Scheduler), and Availability (Available, Break, Leave). The right pane shows a detailed view of the resource's schedule for the week of May 17-19, 2020. The schedule is organized by day and time slots (6pm, 9pm, 12am, 3am, 6am, 9am, 12pm, 3pm, 6pm, 9pm, 12am, 3am, 6am). A green bar indicates availability from 9am to 12pm on Monday, May 18th. A blue bar indicates a break from 12pm to 3pm on Monday, May 18th. The resource name 'Hellen Turner' is listed in the Users/Teams column.

Contact Us

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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