

USER MANUAL



Calendar 365

“Calendar View & Functionalities”

Version: 6.0

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

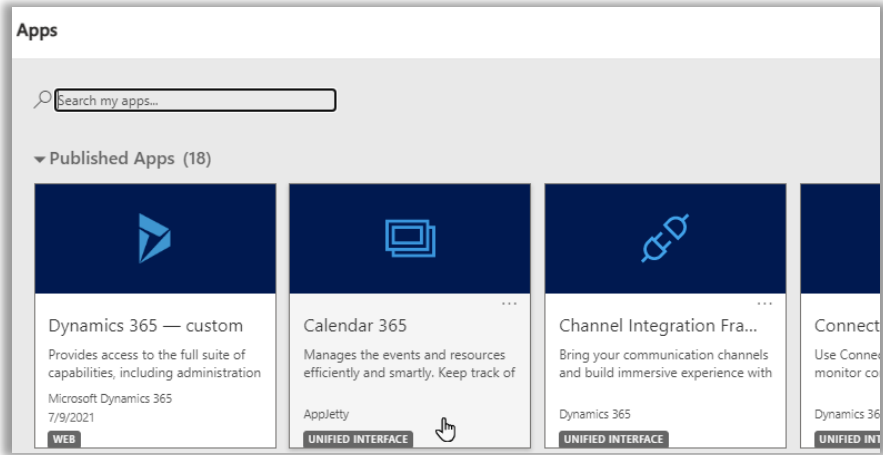
As per the latest version of **Calendar 365**, the following topics are updated or newly added:

- Entity Calendar- Configure the Attributes & Fields to be displayed in the Entity Calendar
- Email option to send Appointment activity creation Email
- Color selection in Resource Scheduling for the Default – User Working Hours

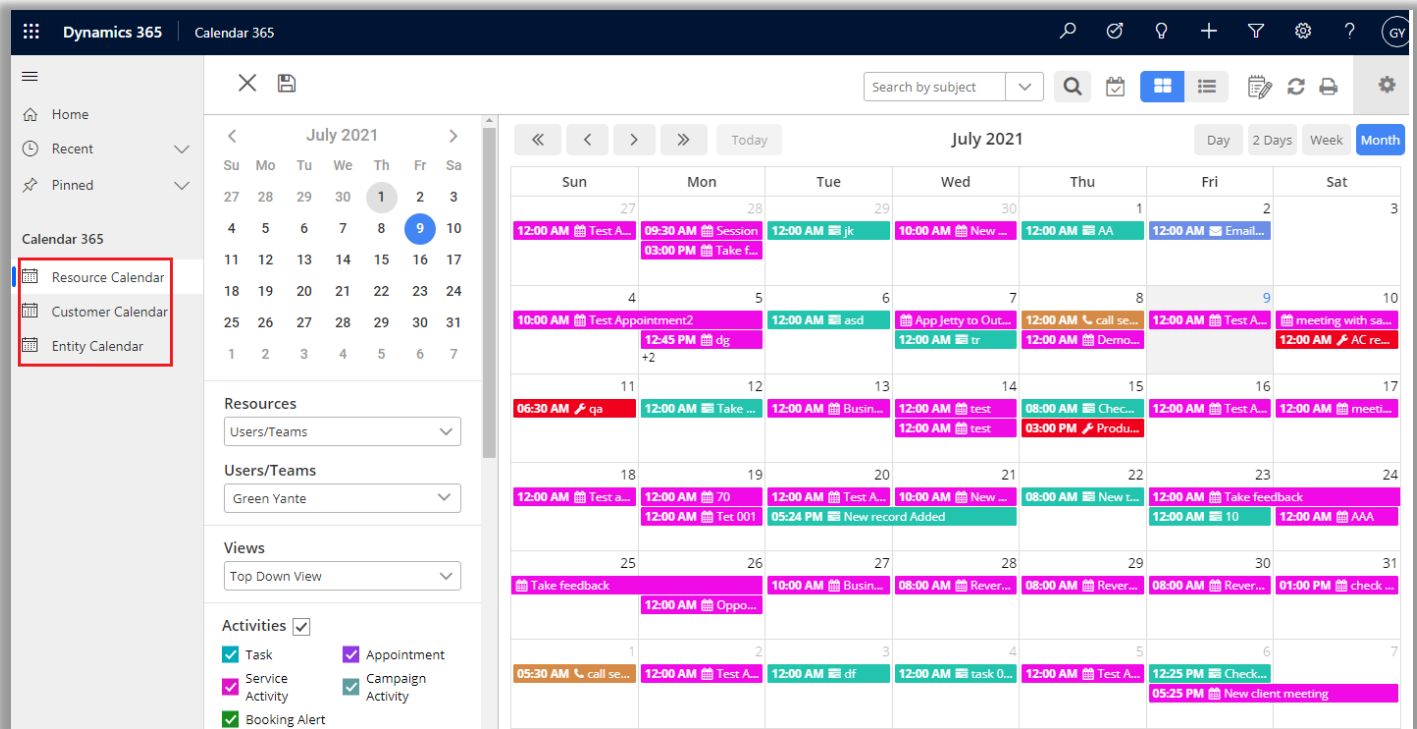
Calendar Management

Calendar 365

- Navigate to the “Apps” from the Dynamics 365 – custom page and click on the **Calendar 365**.



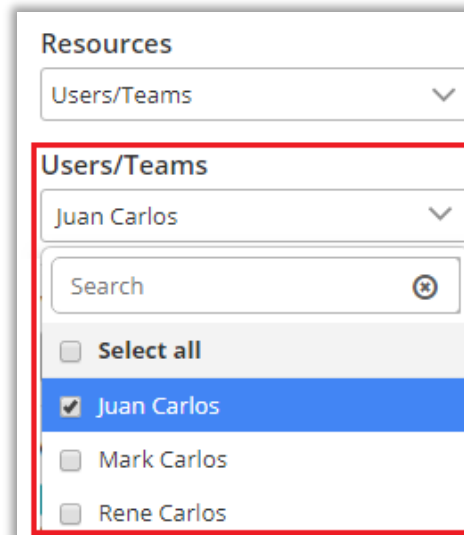
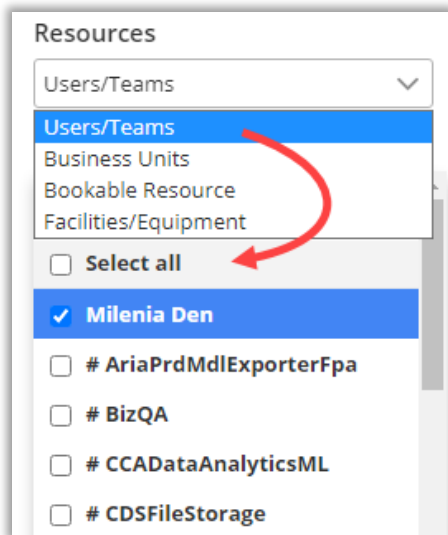
- Calendar page would load, and all the activities will be displayed in the calendar as per the **default configuration** made from the settings.
- Here, you will get three calendars: **Resource Calendar, Customer Calendar, and Entity Calendar**.



- If you want to manage activities and the records for the **Users/Teams, Bookable Resource or Facilities/Equipment**, select “**Resource Calendar**”, to manage activities for **Contacts/Accounts (clients)**, select “**Customer Calendar**”, and to get the **Entity records** of DynamicsCRM on the calendar as per entity configuration for the calendar, select **Entity Calendar**.

Resource Calendar

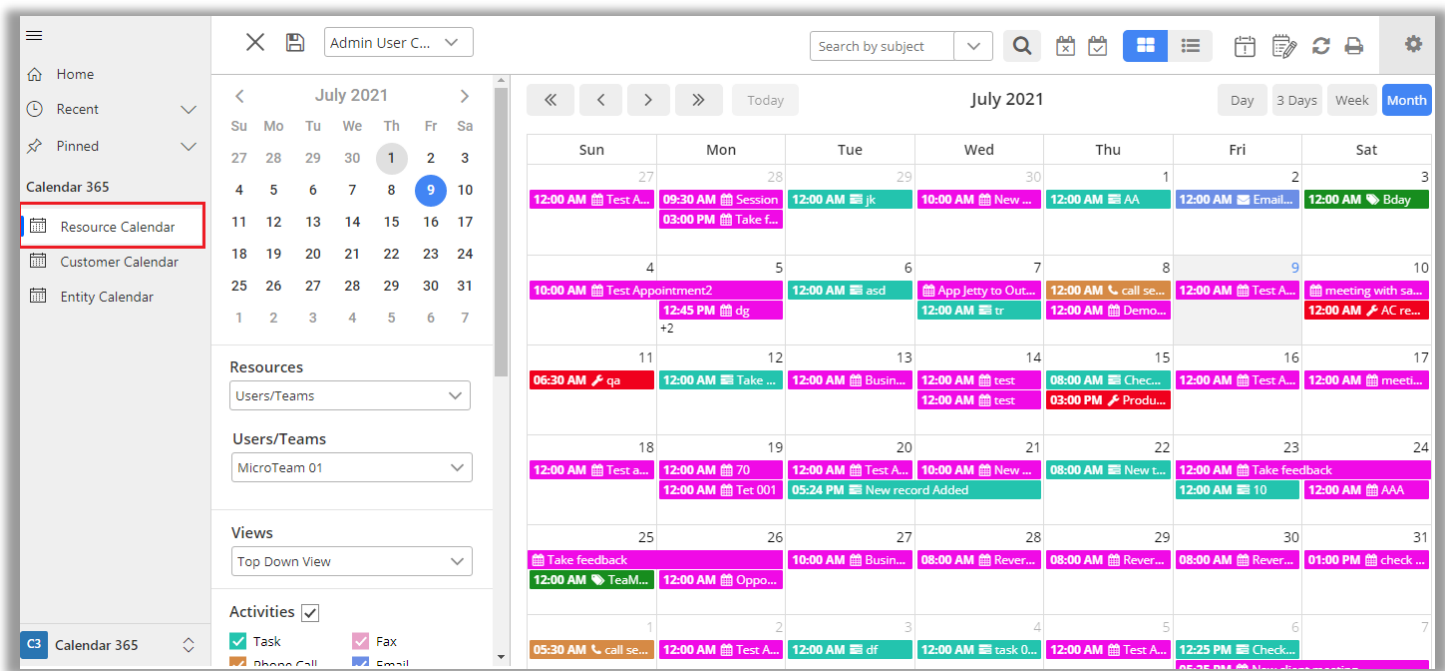
- “User/Teams”, “Resource Booking” and “Facilities/Equipment” resources can be found in Resource Calendar.



- 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.

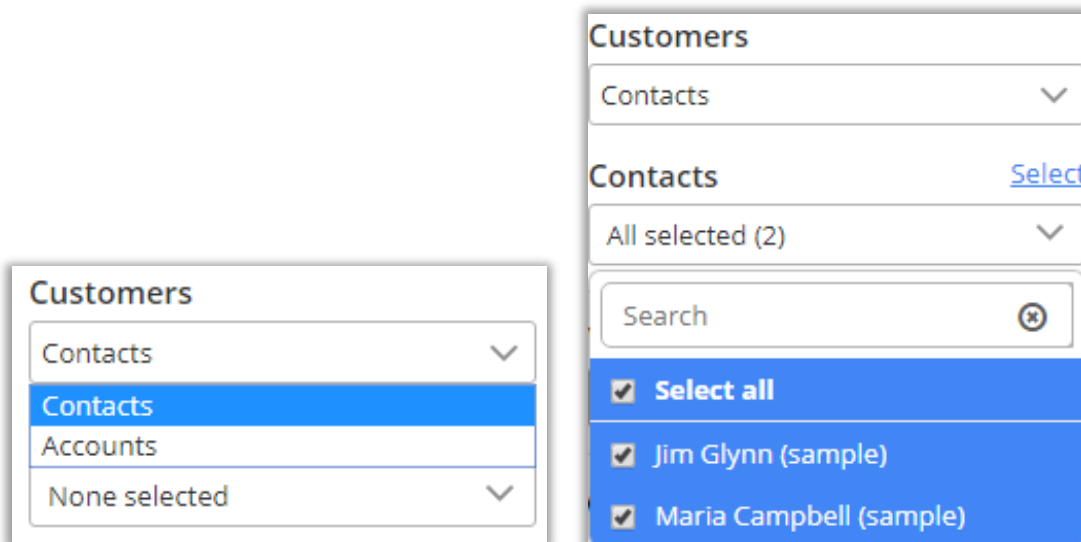
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- You will get the records on the calendar based on the “Resource” and its records selection.



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.



USER MANUAL: Calendar 365- “Calendar View & Functionalities”

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.

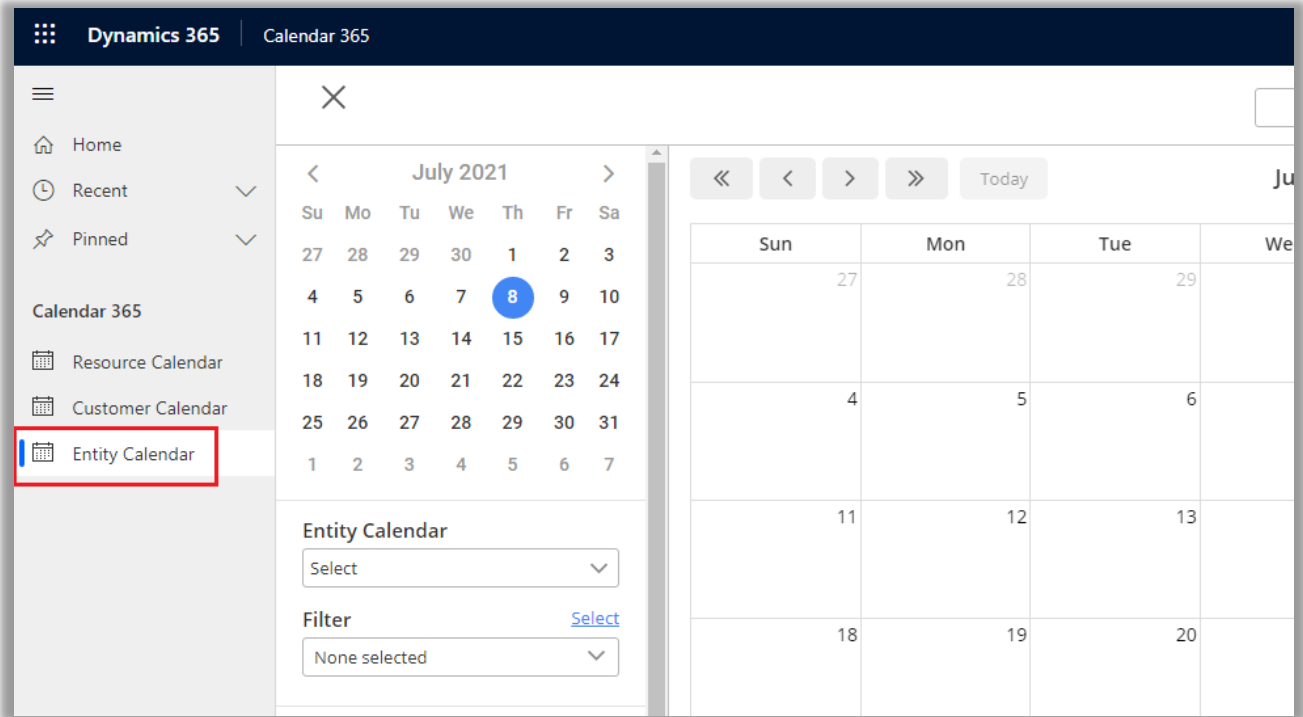
- You will get the records on the calendar based on the “Resource” and its records selection.

The screenshot displays the 'Calendar 365' application interface. On the left sidebar, the 'Customer Calendar' option is highlighted with a red box. The main area shows a monthly calendar for July 2021. The calendar grid includes the following activities:

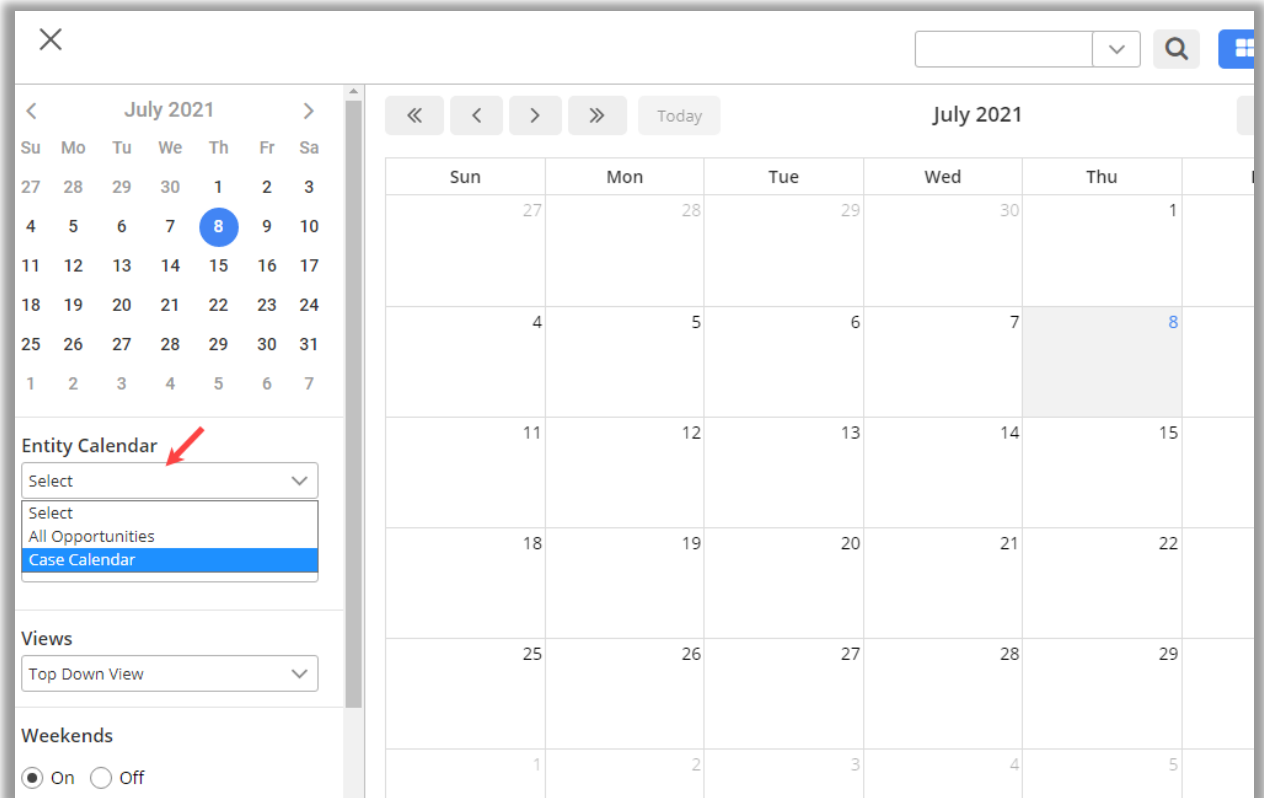
Day	Activity
July 28 (Tue)	12:00 AM jk
July 29 (Wed)	10:00 AM New ...
July 30 (Thu)	12:00 AM AA
July 4 (Sun)	12:00 AM asd
July 8 (Thu)	12:00 AM Test A...
July 11 (Sun)	12:00 AM Take ...
July 18 (Sun)	12:00 AM Test 001
July 20 (Tue)	10:00 AM New ...
July 25 (Fri)	12:00 AM Oppo...
July 27 (Sun)	08:00 AM Rever...
July 28 (Mon)	08:00 AM Rever...
July 29 (Tue)	08:00 AM Rever...
July 30 (Wed)	08:00 AM Rever...
July 1 (Sun)	12:00 AM Test A...
July 4 (Wed)	12:00 AM Test A...

Entity Calendar

- By clicking on the “Entity Calendar”, you will check the entity records on the calendar as you have configured under the “Entity calendar” from the Calendar setup.

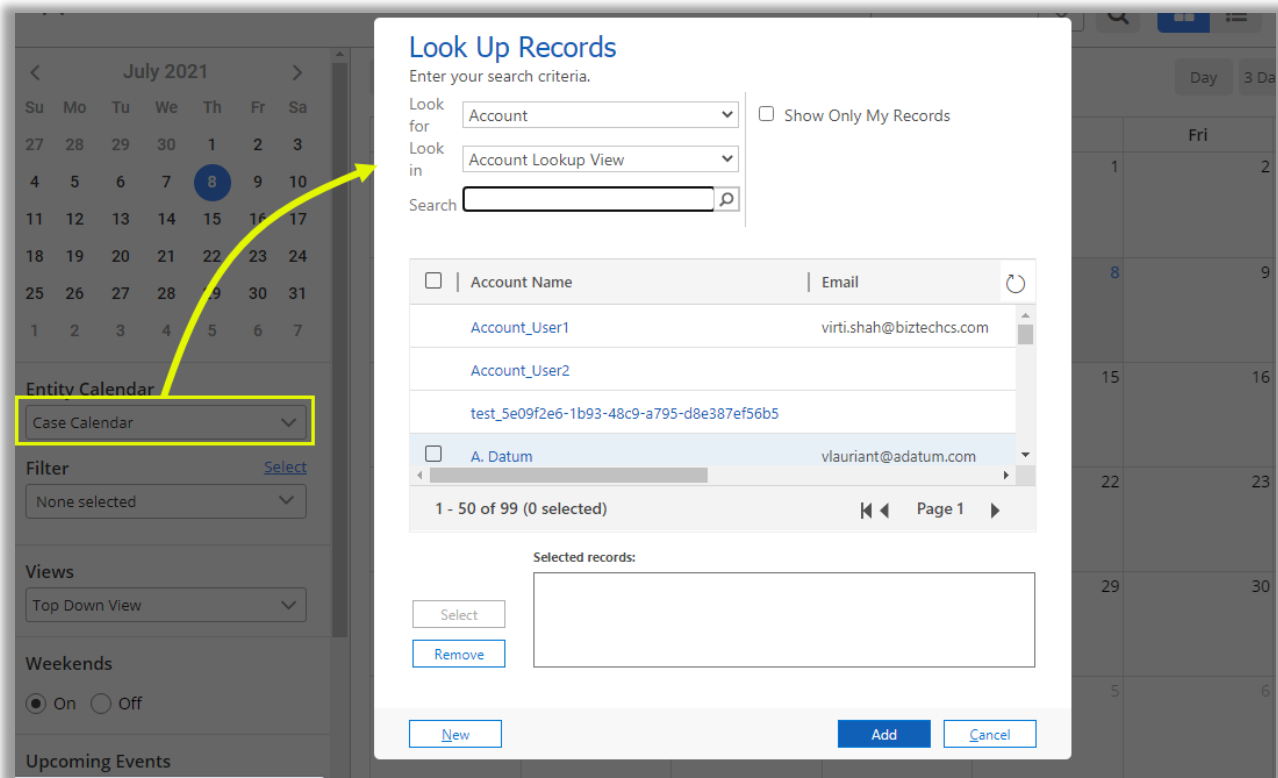


- From the left navigation, by clicking on the “Entity Calendar” dropdown, you will get the list of Entities that you have configured.

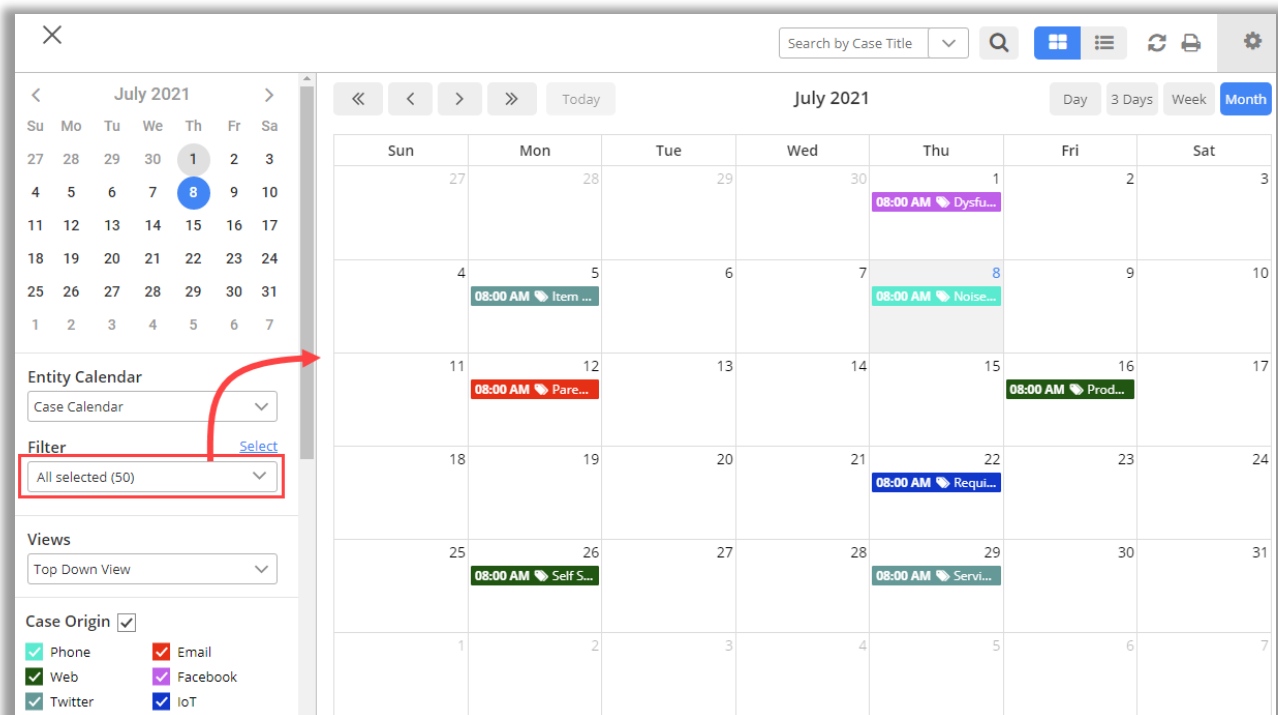


USER MANUAL: Calendar 365- “Calendar View & Functionalities”

- Once you select the “Entity”, the LookUp Records popup will open to select the CRM records to display the entity records of those selected CRM records.



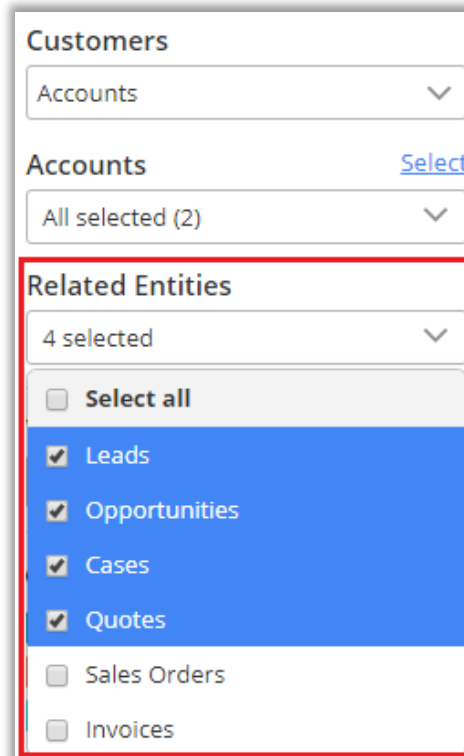
- After selecting the CRM records, click on the **Add** button. The selected records will be displayed in the **Filter** dropdown. The entity records will be plotted for the selected CRM records on the calendar.



- After selecting the CRM records, click on the **Add** button. The selected records will be displayed in the **Filter** dropdown. The entity records will be plotted for the selected CRM records on the calendar.

Related Entities

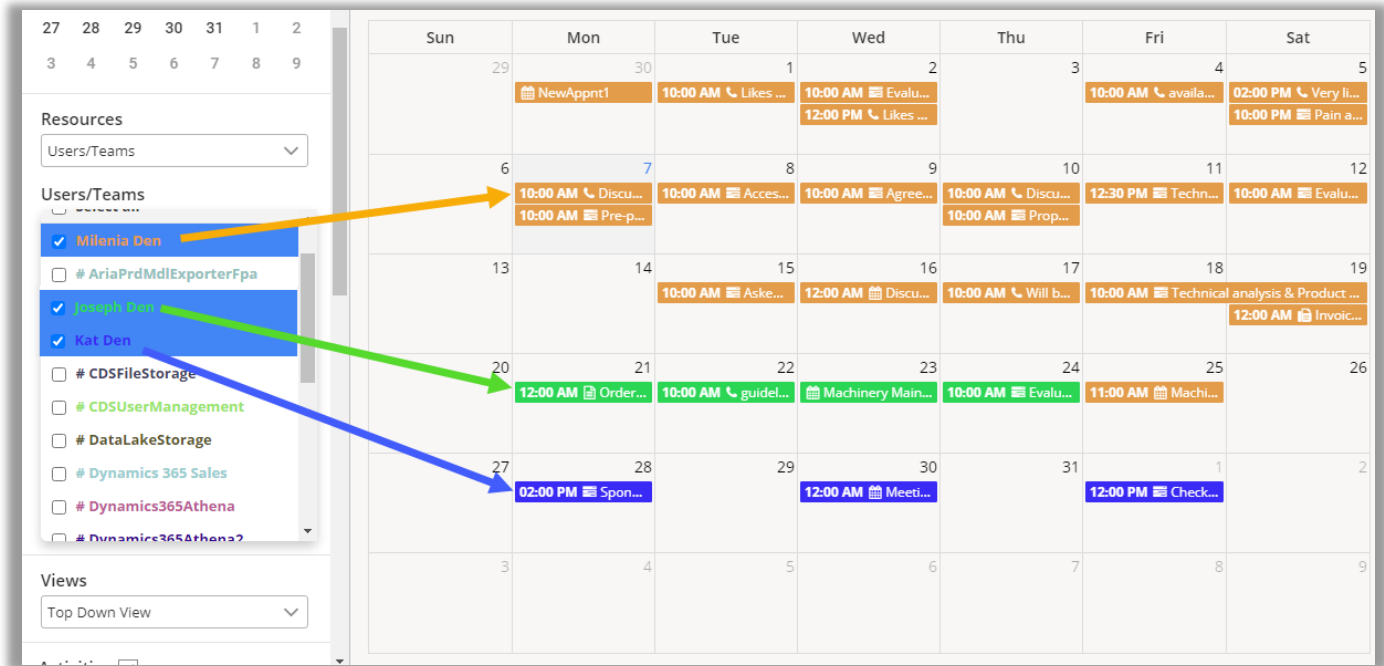
- On selecting accounts or contacts as Customers, **Related Entities** dropdown is enabled from where user can select one or more related entity of account or contact related to which you want to view activities.



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

Owner wise Colorized activity

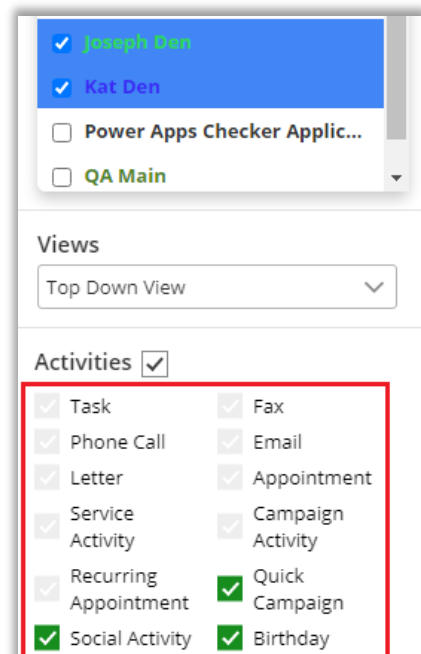
- If you have enabled the owner wise color option and set the specific color to different owners, the activities of the different owners will appear on the Calendar based on the Owner’s color.
- On the Calendar, user can see the colorized activities based on the selected color for the specific owner (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:

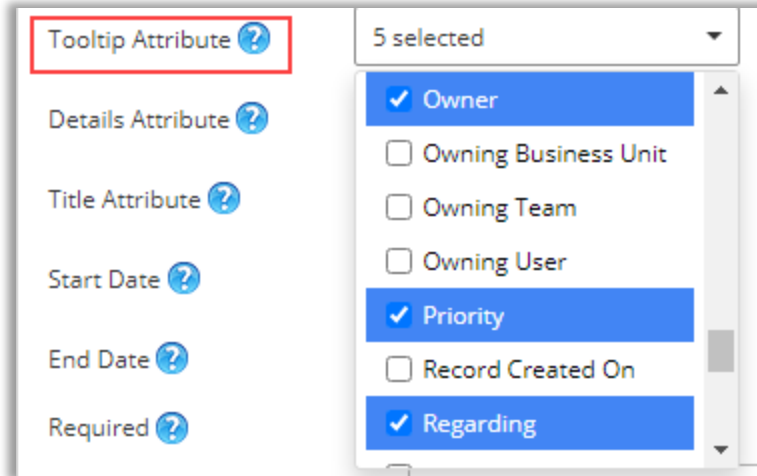
- The user can see different color combinations activities for specific users only under **Resource Calendar**.
- Once you have selected the Owner Color option, the individual color of the activities will be disable and the user wise colorized activities will display on the calendar.



Activity Details

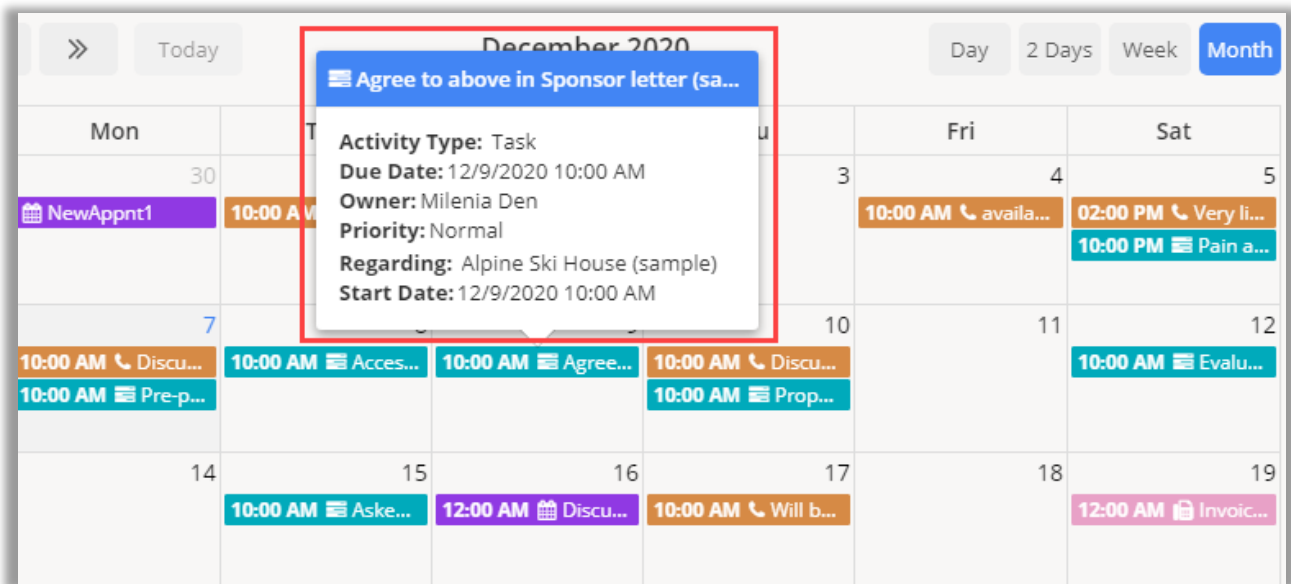
Setup for Tooltip Attribute & Tooltip view:

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



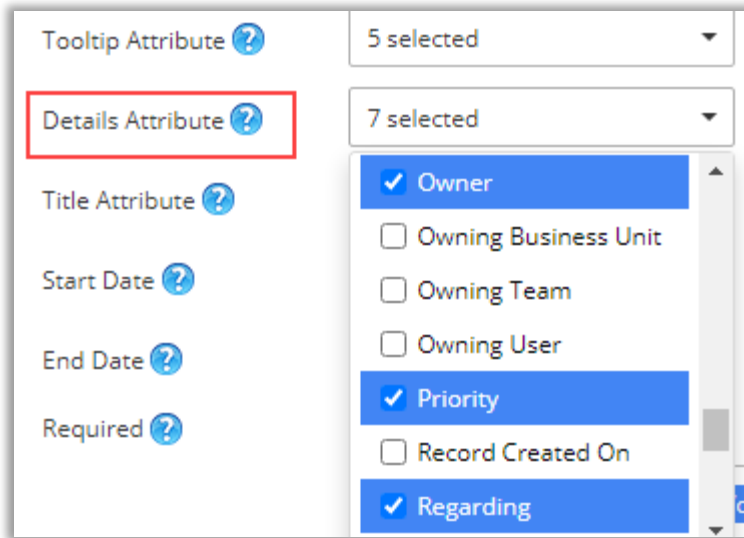
Tooltip on Calendar

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



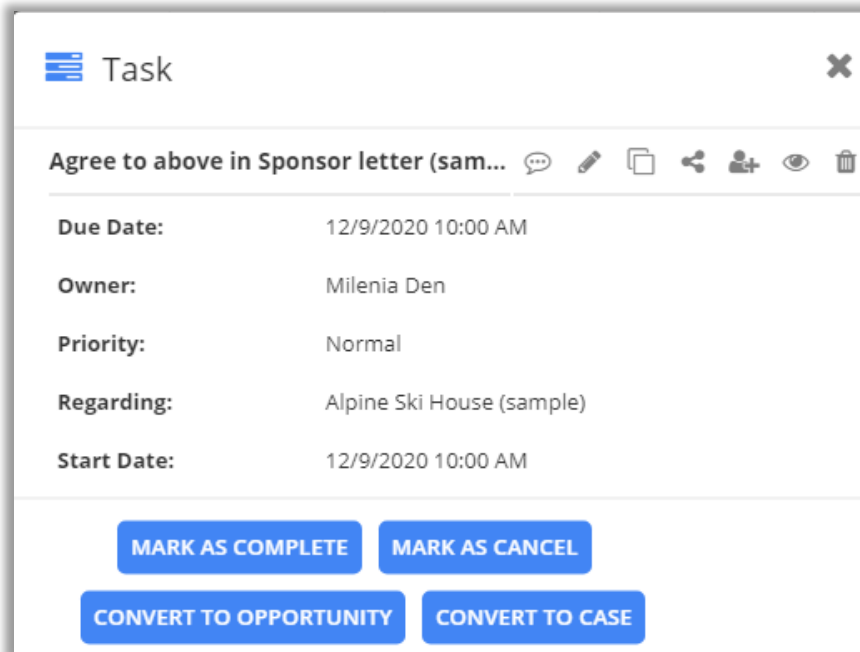
Setup for Detail Attribute & Attribute view:

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



Activity Detail view on Calendar

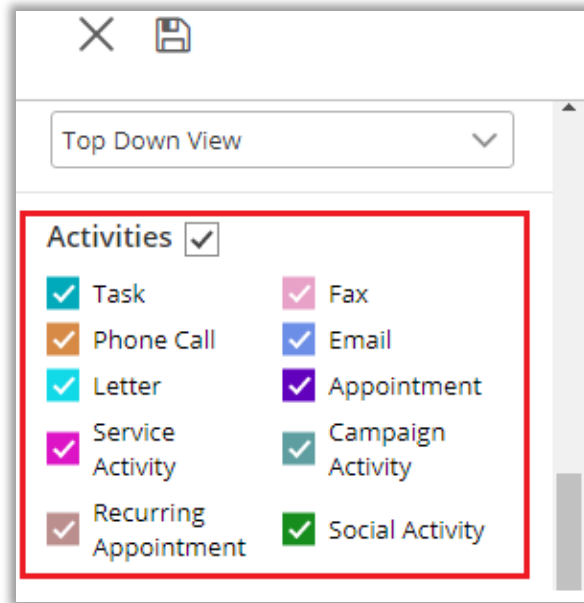
- To view the 'Activity Details', click on the activity, then the details can be seen in **detail**.



Left side panel options

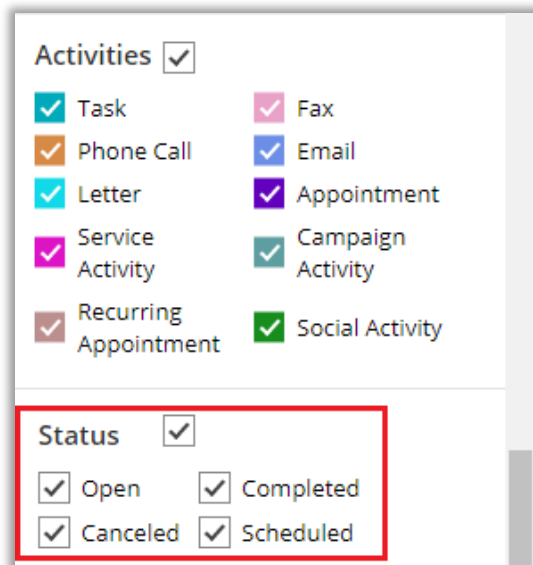
Activities

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



Status

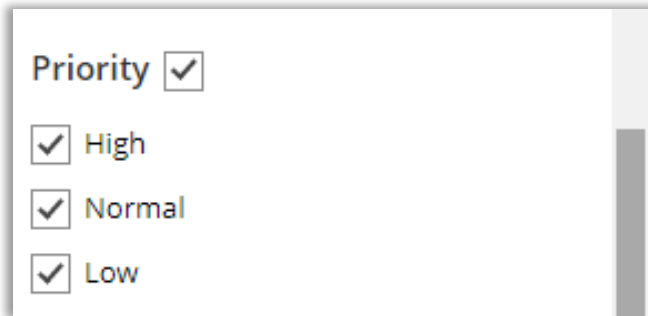
- To view the activities as per their statuses, navigate to ‘Status’ section and check the checkbox besides each option to display the activities with statuses in the calendar.



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.

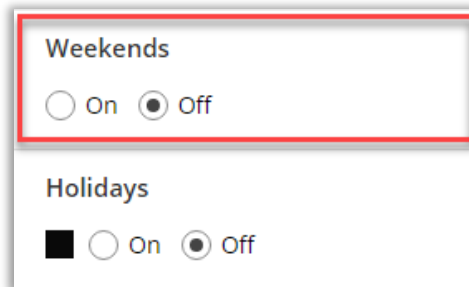
Priority

- 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.

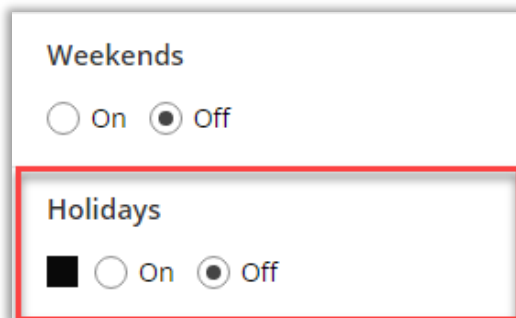


Weekends & Holidays

- 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.

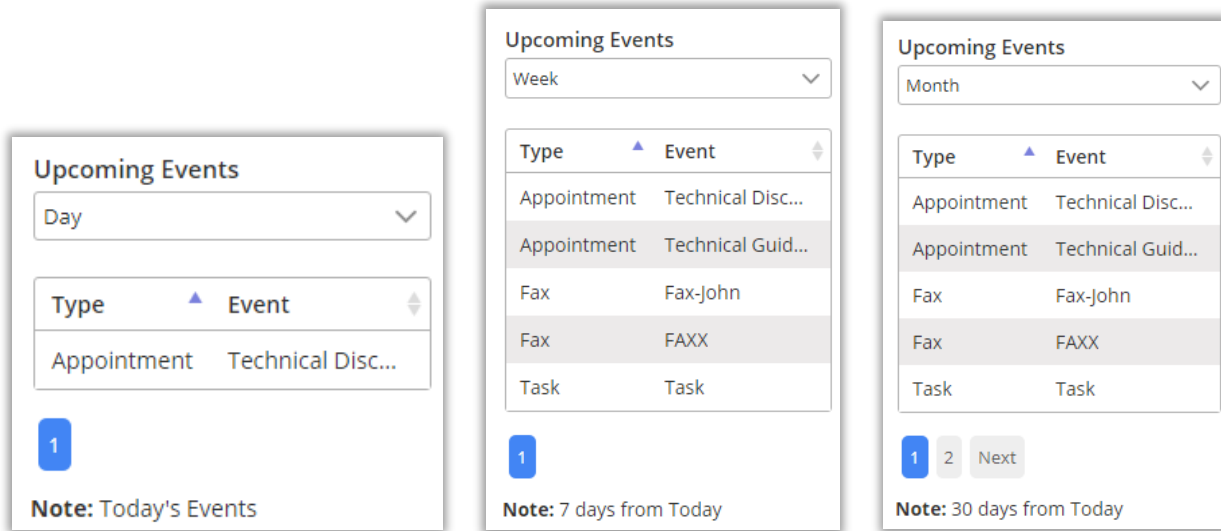
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Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
		10:00 AM Pre-propo...		Halloween 02:00 PM Sponsor ha...	02:50 PM Review Lead	
3	4	5	6	7	8	9
Daylight Saving Time ...	10:00 AM Discuss ne...		10:00 AM Discuss ne...		10:00 AM Evaluation ... 02:50 PM Review 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.

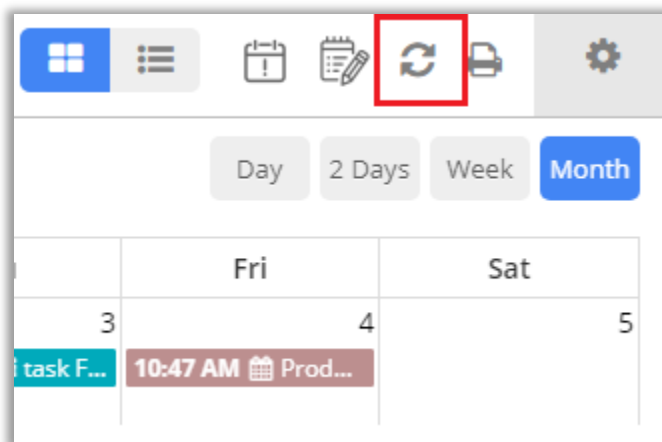
Upcoming Events

- 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

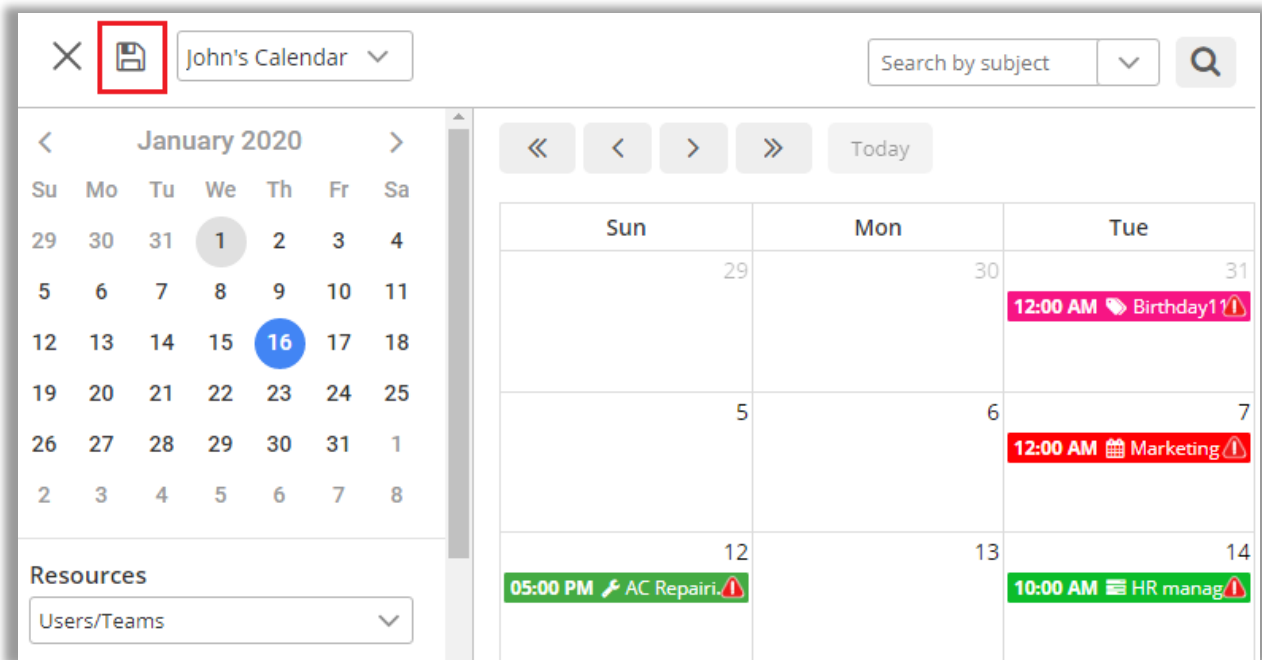
- To fetch all the events or activities from the CRM, click on the 'Refresh' icon on the right-hand side of the calendar.



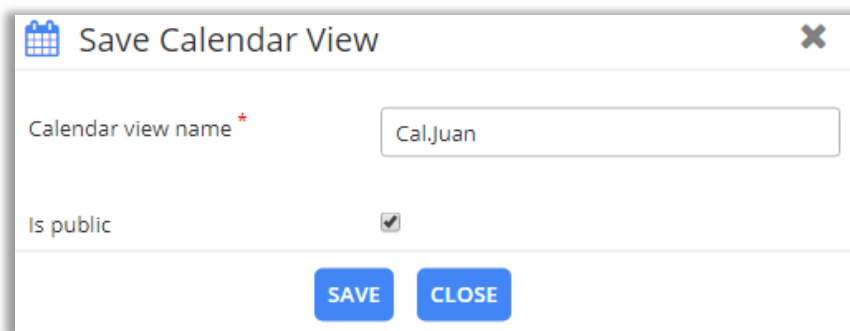
Note: After changes in configuration, you must **Refresh** to view the applied changes.

Save and Share Calendar Views

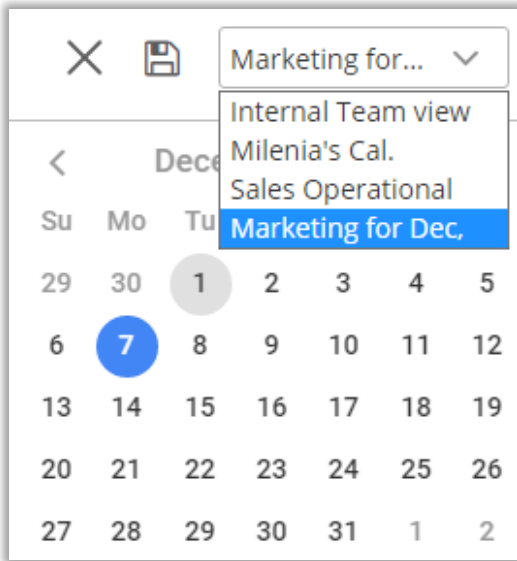
- You can also **Save** and **Share** any calendar view in Resource Calendar and Customer Calendar for future reference.
- Left panel Settings like selected resources, selected calendar view as well as, activities, selected status, priority, weekends and holidays get saved on saving view.
- You can save 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 AppJety Calendar role under shared calendars section.

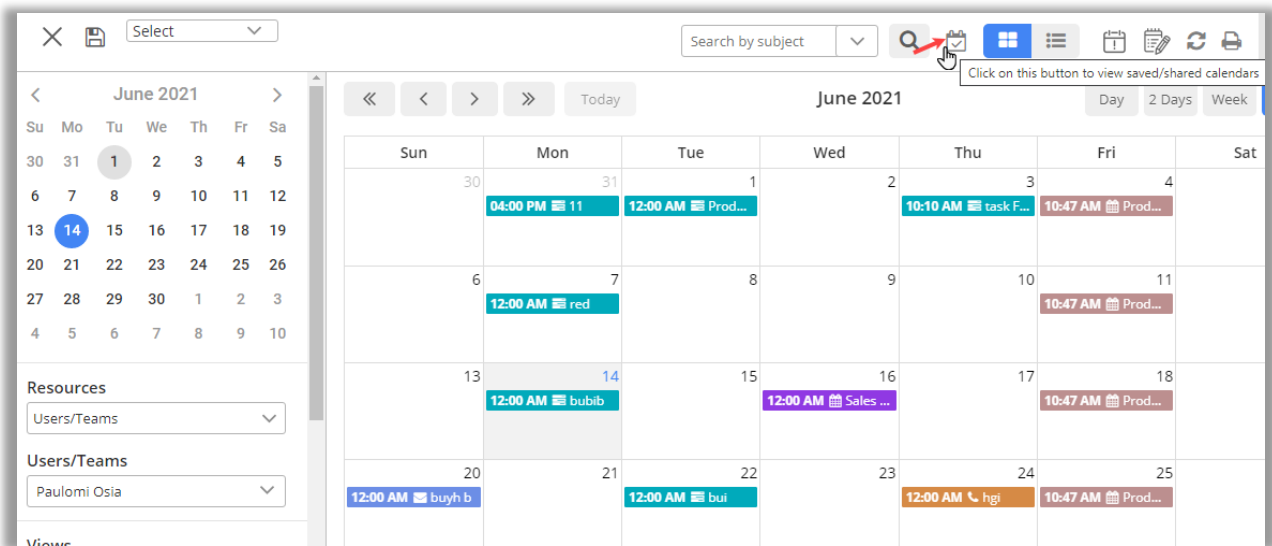


- Click on ‘Save’ button to save the calendar view.
- On the header, the ‘Calendar View name’ will be appeared in left side.

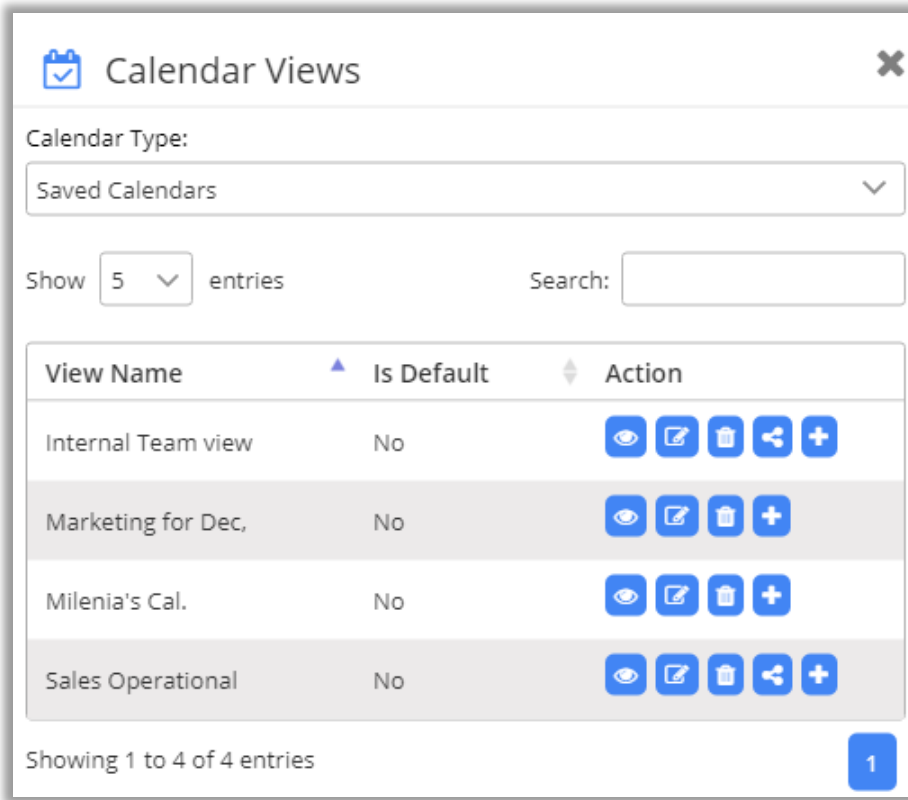


- You can see the list of **Saved Calendars** from the drop-down list of Calendar name.
- By click on any saved Calendar name, you can check that Calendar view.

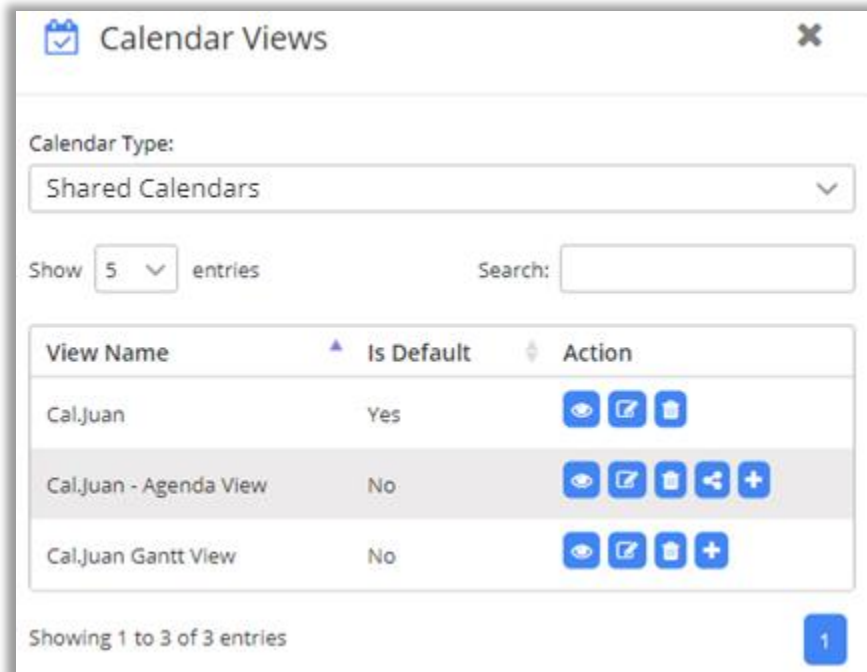
View Saved Calendar list



- 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.

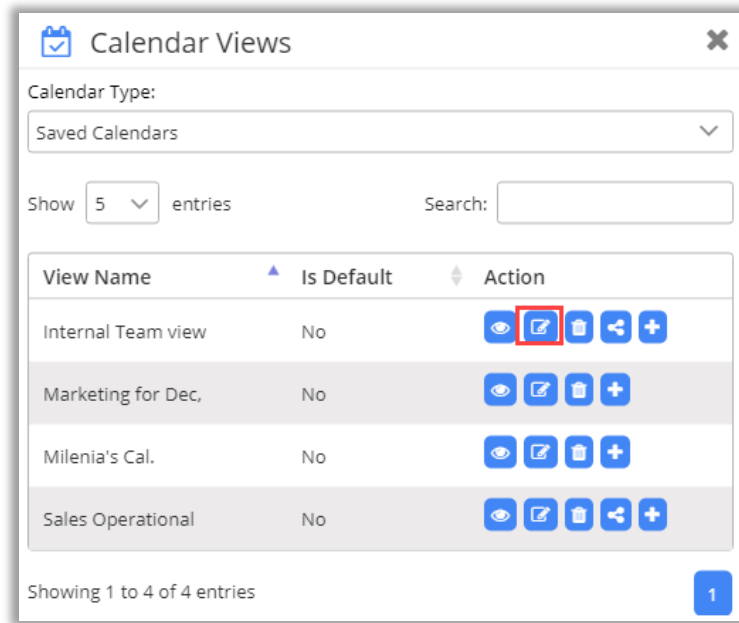


- For saved calendar and being the owner of that calendar, you can View, Edit, Delete and Share calendar. 'Share' option is available only when calendar is private (should not select as 'Is Public').
- Also, different actions are available only when you are the owner of the calendar, else it just shows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

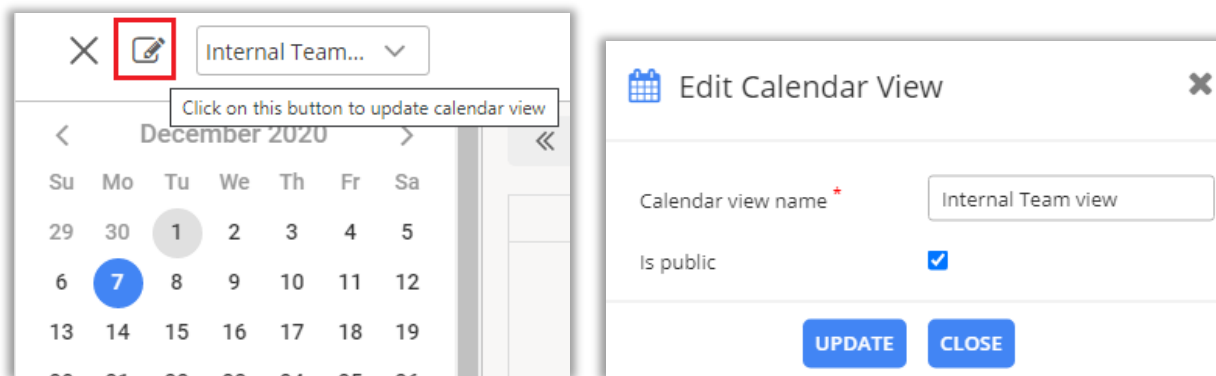
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- Clicking on edit calendar, particular saved calendar opens so as to edit it as required and along with that shows update calendar view icon to update calendar.

Edit & Update Calendar



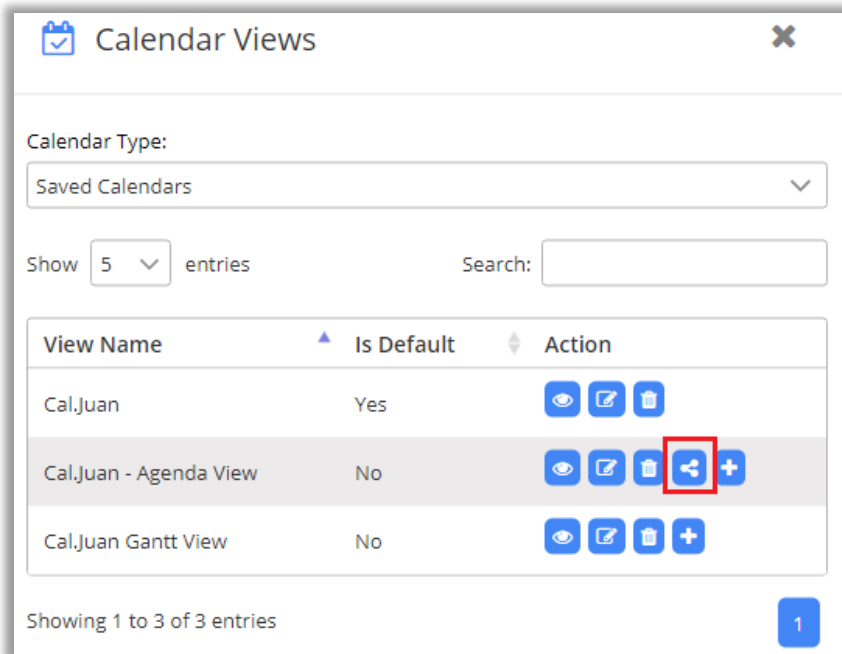
- On clicking 'edit' icon, you get to update calendar name and select if calendar is public or private.



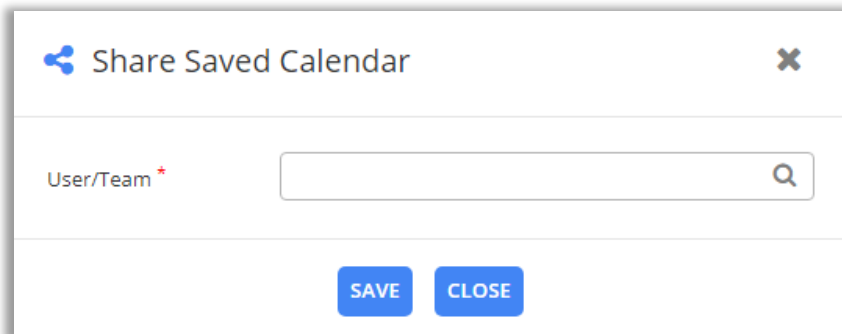
- Click on **Update** button to update the changes made in calendar.

Share 'Saved Calendar' Views

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



- 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.



Look Up Records

Enter your search criteria.

Look for:

Look in:
 (highlighted)

Search:

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

1 - 3 of 3 (0 selected) Page 1

Selected records:

- 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:

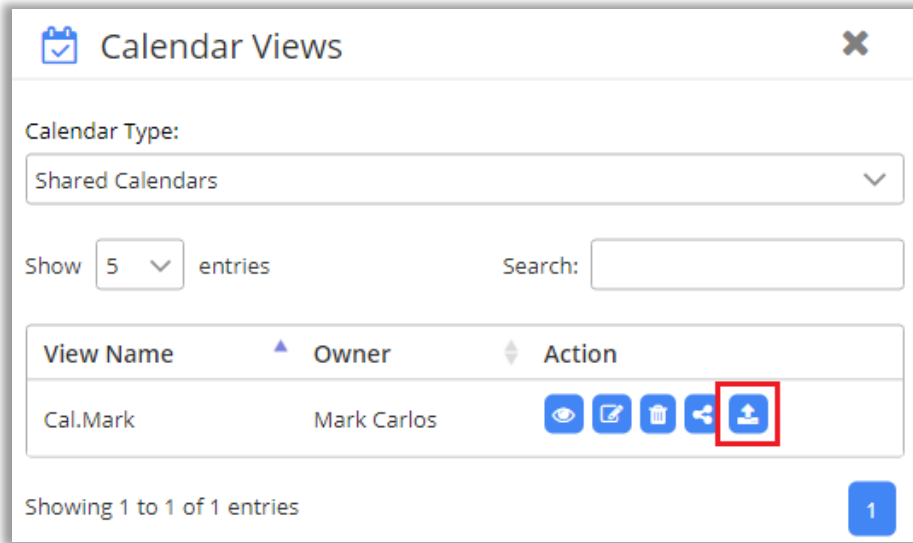
(dropdown menu with "Shared Calendars" highlighted)

View Name	Owner	Action
123 test	Jacob hellon	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
CalendarViewDemo	Jacob hellon	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Share"/>
Template1	Jacob hellon	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

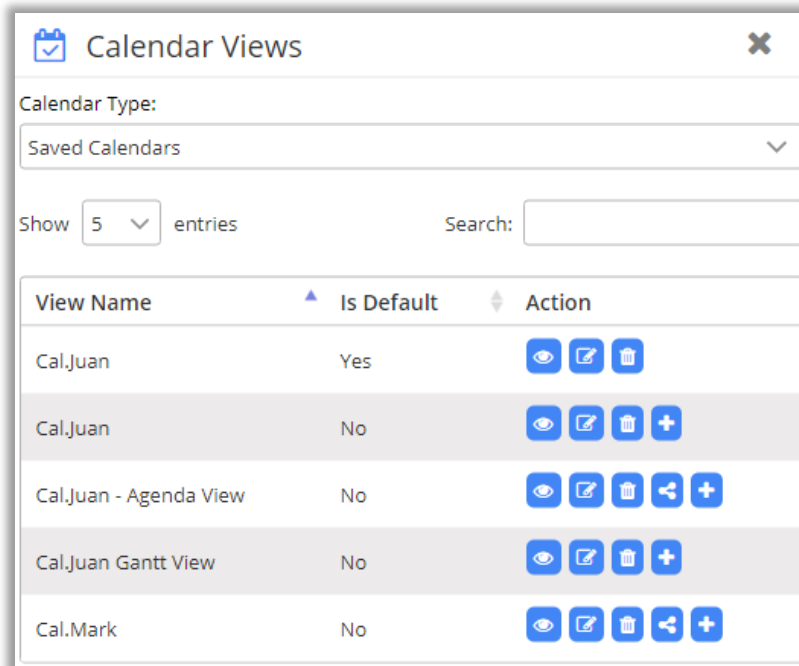
- When saved calendar is previewed, it enables a button to go back to the current view (previous view).

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.
- You can pre-select CRM records to share the Appointment activity with them when appointment creates. You can select the **Required** & **Optional** records from the activity configuration under the Calendar Settings to share the Appointment activity.
- As you have selected the records, it will be pre-selected during the ‘Appointment’ activity creation.

The screenshot shows a 'Create Activity' dialog box with the following fields and options:

- Activity:** Appointment
- Subject ***: (Empty text field)
- Regarding:** (Empty text field with search icon)
- Start Date *:** 05/27/2021 12:00 AM
- End Date *:** 05/28/2021 12:00 AM
- All Day Event:**
- Required:** A list of CRM records with remove icons (X) next to them:
 - A. Datum
 - Trey Research
 - Best o' Sales
 - Contoso, Ltd
 - Contoso Fabrication
 - Contoso Instrumen...
 - Contoso Assembly
 - Contoso Pharma
- Optional:** A list of CRM records with remove icons (X) next to them:
 - A. Winery
 - A. Datum

At the bottom of the dialog is a blue **CREATE** button. Two red arrows point to the 'Trey Research' record in the 'Required' list and the 'A. Datum' record in the 'Optional' list.

- You can remove the records from Required & Optional as per your requirement if you do not want to share the appointment with some of the selected records.

- You can add more records into Required & Optional by clicking on the Search icon. You will get the Lookup Records popup from there you can select other records as per your requirement.

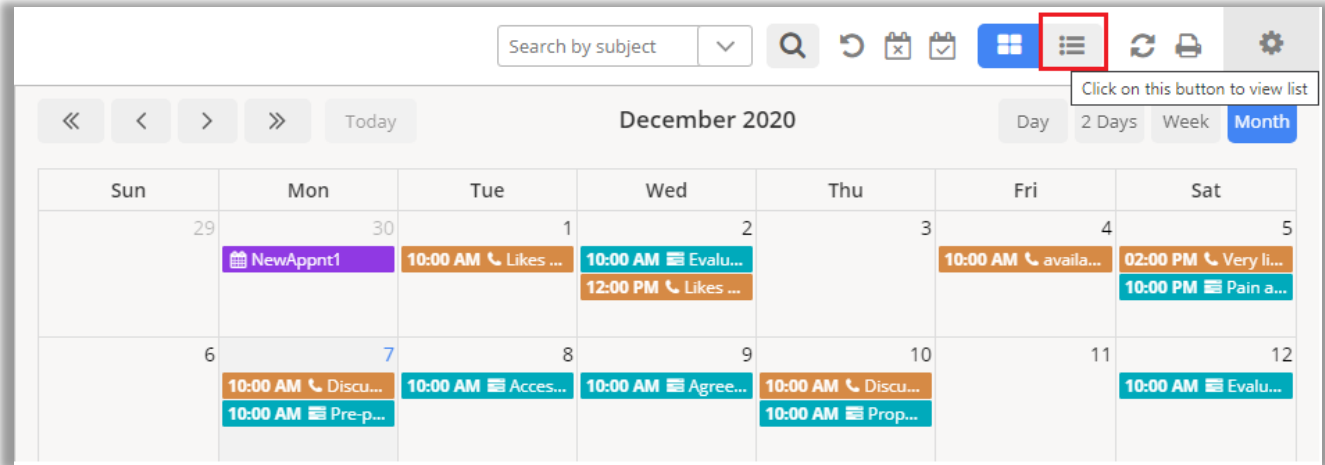
The screenshot shows a 'Create Activity' dialog box with the following fields and options:

- Subject ***: Product Demo & AMC explanation
- Regarding**: Litware
- Start Date ***: 05/27/2021 02:00 PM
- End Date ***: 05/27/2021 04:00 PM
- All Day Event**:
- Required**: A. Datum, Adventure Works, Fabrikam, Inc., Lucerne Publishing, Wide World Import..., Vincent Lauriant. A search icon is highlighted with a red box.
- Optional**: Alpine Ski House, Blue Yonder Airlines, City Power & Light, Coho Winery. A search icon is highlighted with a red box.
- CREATE** button at the bottom.

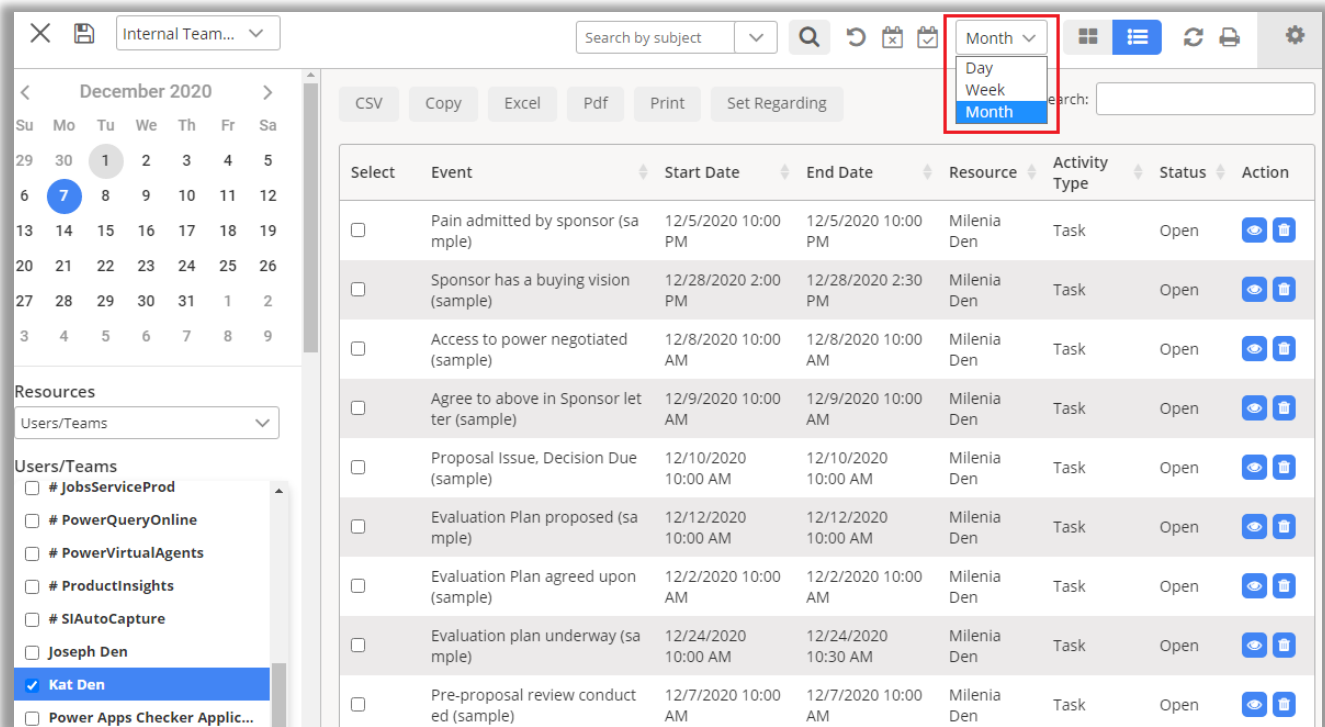
- Once the appointment is created, the other user will also get the appointment in their calendar.
- If you have enabled the **Email** option from the Calendar configuration, the Email will be sent to the Required and Optional attendees that are selected.

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.



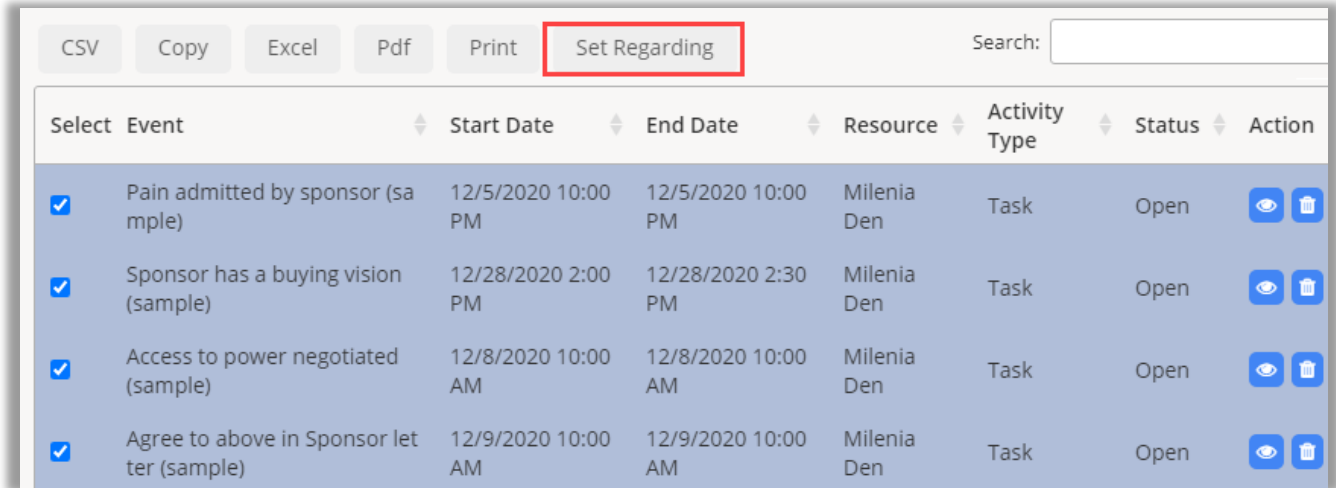
- List view works based on **small calendar** available on left side of the calendar view. You will get the list of events based on day/date selected in the smaller left side calendar.
- For **Day** span, it shows list of events that fall under the days that are selected.
- For **Week** time span, it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

USER MANUAL: Calendar 365- "Calendar View & Functionalities"









- 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

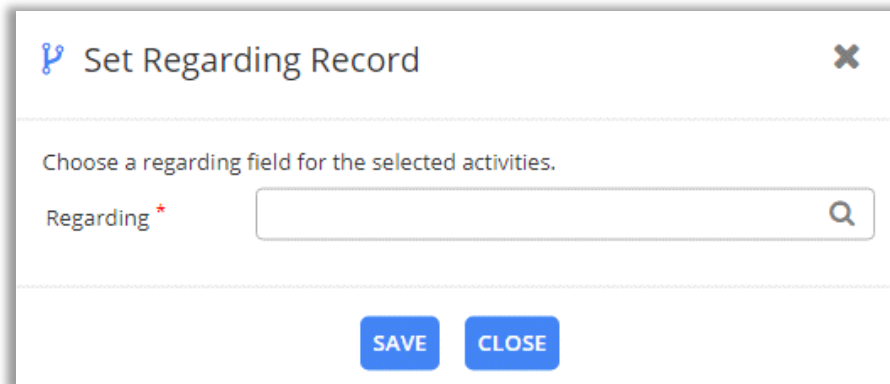
- To set regarding for the records, select the records and click on **Set Regarding** button.



The screenshot shows a calendar grid view with a toolbar at the top. The toolbar contains buttons for 'CSV', 'Copy', 'Excel', 'Pdf', 'Print', and 'Set Regarding'. The 'Set Regarding' button is highlighted with a red rectangular box. To the right of the toolbar is a search input field labeled 'Search:'. Below the toolbar is a table with the following columns: 'Select', 'Event', 'Start Date', 'End Date', 'Resource', 'Activity Type', 'Status', and 'Action'. There are four rows of data, each with a checked checkbox in the 'Select' column. The 'Action' column contains icons for 'View' (eye) and 'Delete' (trash).

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.



The screenshot shows a dialog box titled 'Set Regarding Record' with a close button (X) in the top right corner. Below the title bar, there is a text prompt: 'Choose a regarding field for the selected activities.' Below this prompt is a search input field labeled 'Regarding *' with a magnifying glass icon on the right. At the bottom of the dialog box, there are two buttons: 'SAVE' and '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,

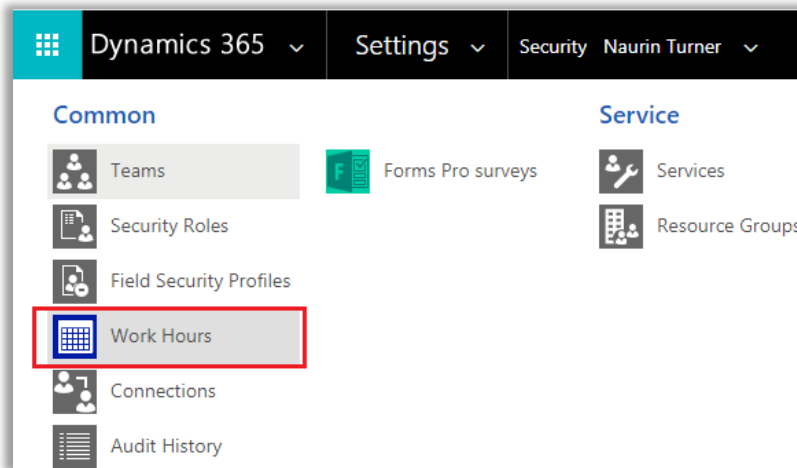
Resource Scheduler (Manage Working Hours)

- 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.

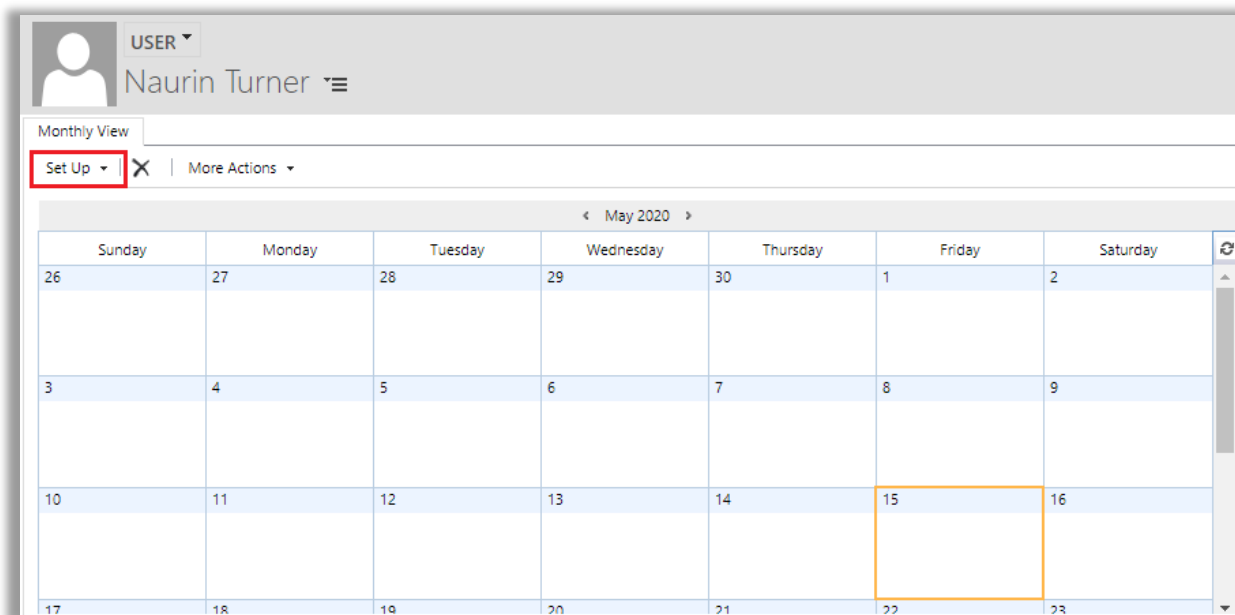
Set the Working hours for default CRM users:

- 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.

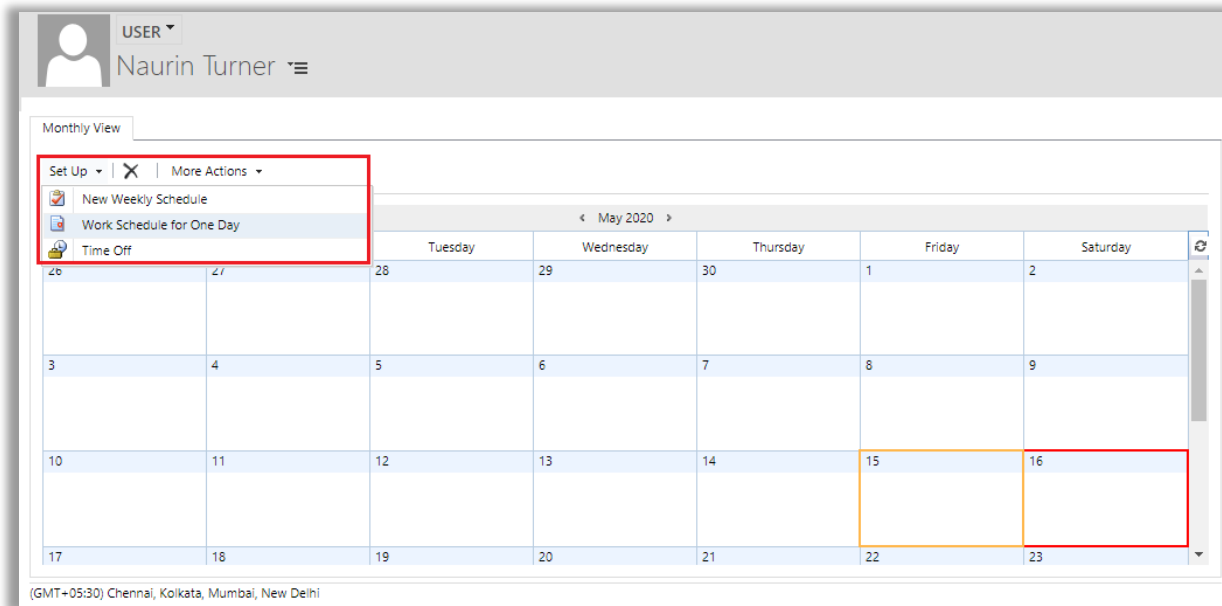


- By clicking on Work Hours, the default calendar of CRM will display with the records of the selected user if already inserted.



USER MANUAL: Calendar 365- “Calendar View & Functionalities”

- 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.

Set Work Hours and Service Restrictions

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

Work Hours | Service Restrictions

Select a date
Date: 05/16/20

Enter work hours and breaks [Show Capacity >>](#)

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.

USER MANUAL: Calendar 365- “Calendar View & Functionalities”

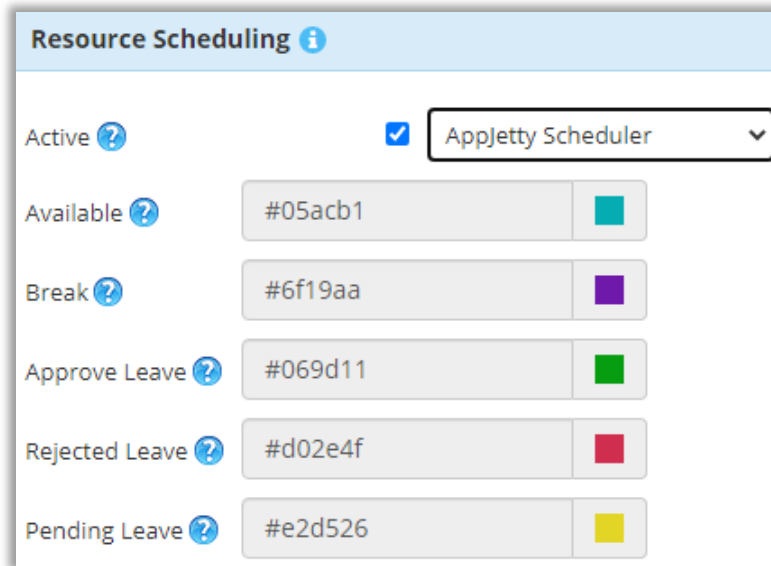
- If you have selected the **Default (User working hours)** in “Resource Scheduling” option, you will get the working hours on the AppJetty Calendar which is set in CRM default calendar.

The screenshot shows the AppJetty Calendar interface. On the left, there is a calendar grid for the month of May, with the 15th highlighted. Below the calendar, there are several dropdown menus: 'Resources' (Users/Teams), 'Users/Teams' (Naurin Turner), and 'Views' (Resource Scheduler). The 'Views' dropdown is highlighted with a red box. Below these are 'Availability' options: Available (green), Break (blue), and Leave (orange). A 'Status' checkbox is also present. The main calendar view shows a grid for Saturday 16/5 and Sunday 17/5. The grid has columns for 12am, 3am, 6am, 9am, 12pm, 3pm, 6pm, and 9pm. A green bar indicates availability from 6am to 3pm on Saturday. A blue bar indicates a break at 12pm. The 'Users/Teams' column shows 'Naurin Turner'.

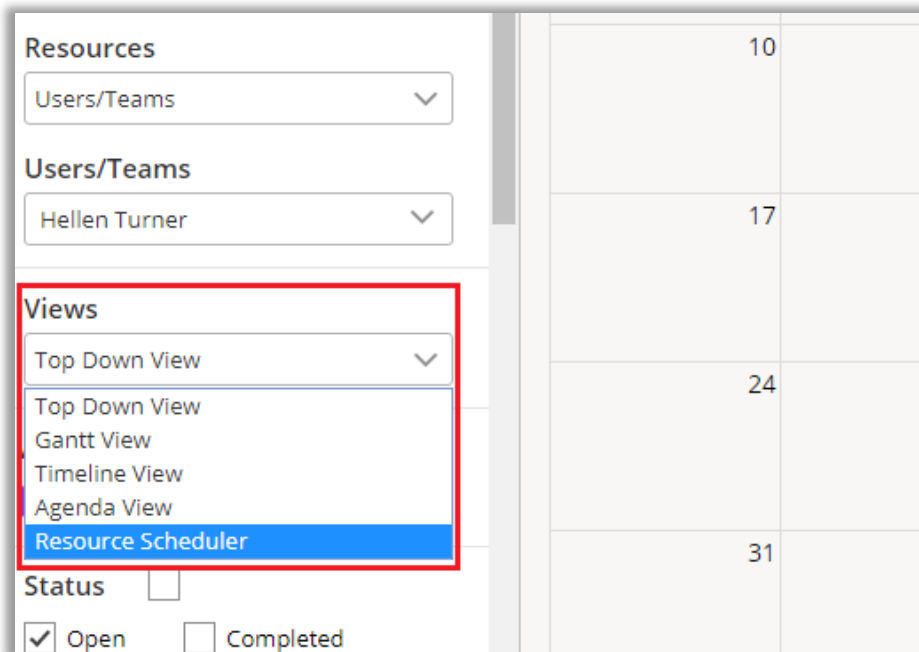
Note: You can only view the Working hours which is set in CRM default calendar of the user.

Add the Working hours in AppJetty Scheduler:

- If you have selected the **AppJetty Scheduler** in “Resource Scheduling” option, you can add the working hours with availability and manage the leaves on the AppJetty Calendar.

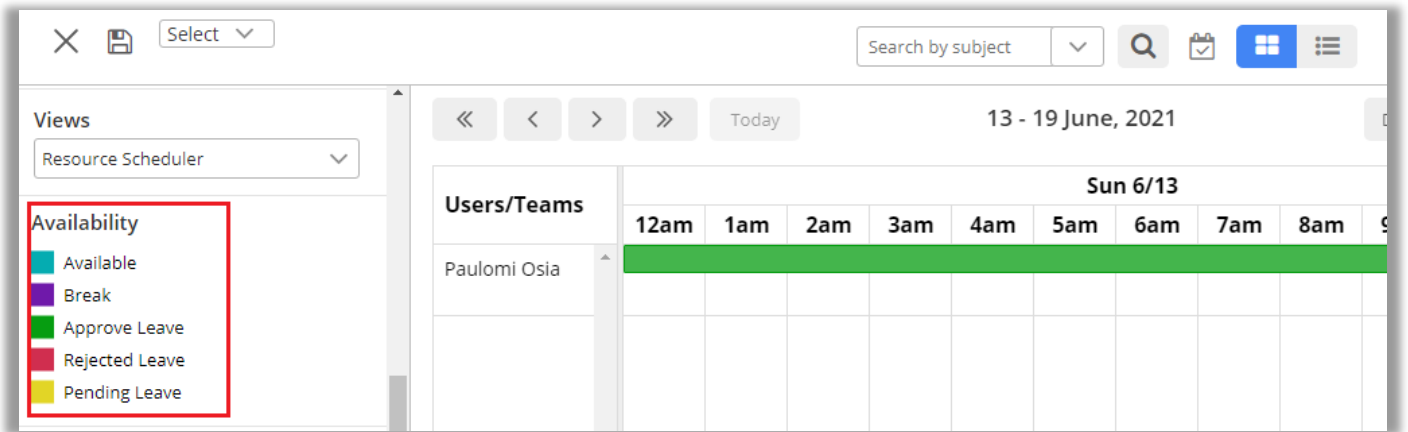


- You will get the Color combinations in the Calendar as per you have set from the Calendar settings. You can differentiate the availability and manage leaves by the colors.
- First, you need to select the **Resource Scheduler** in the “Views” option from the right panel.



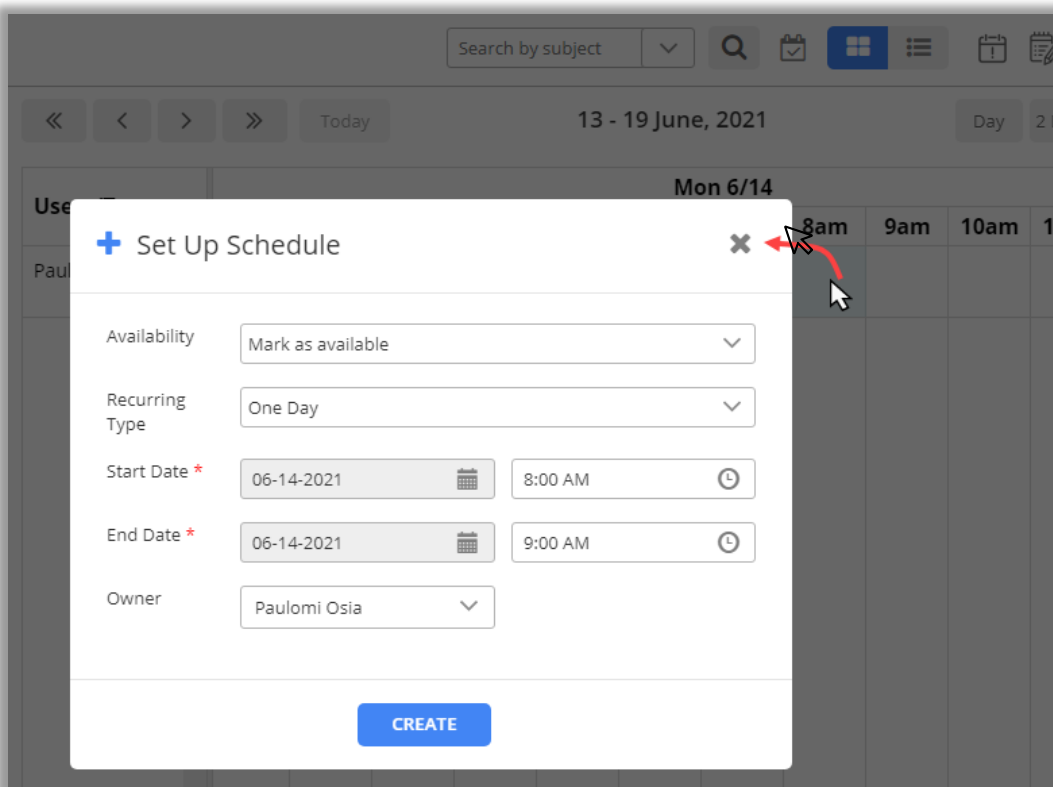
USER MANUAL: Calendar 365- “Calendar View & Functionalities”

- By clicking on the Resource Scheduler, you will get the “Availability” options as per Calendar settings.



Setup Schedule

- By selecting the Resource Scheduler, the Calendar with work scheduled records will display if already inserted else you can add the working hours on the AppJetty Calendar.



- After selecting the required details for the Working Hours, click on the **Create** button to setup the working hours.

- You can also setup the working hours for the more than one day by selecting the Recurring Type and selecting the Date Range with time duration.

The screenshot shows a 'Set Up Schedule' dialog box with the following fields:

- Availability:** Mark as available
- Recurring Type:** One Day (selected)
- Start Date *:** 06-18-2021
- End Date *:** 9:00 AM
- Owner:** Paulomi Osia

A blue 'CREATE' button is located at the bottom of the dialog.

- 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 and select the required Owner.
- After selecting all the details, click on the **Create** button to add the work schedule.

USER MANUAL: Calendar 365- "Calendar View & Functionalities"

- Once you create the working hours, it will display on the calendar as per date & time duration.

The screenshot displays a calendar interface for the week of June 13-19, 2021. The current view is 'Week', and the selected date is 'Mon 6/14'. The calendar grid shows a teal bar representing working hours from 7am to 6pm. A red arrow points to the 8am mark on the teal bar. The left sidebar contains filters for Resources, Users/Teams, Views, Availability, Status, and Priority.

Users/Teams	m	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm
Paulomi Osia													

Resources
Users/Teams: Paulomi Osia

Views
Resource Scheduler

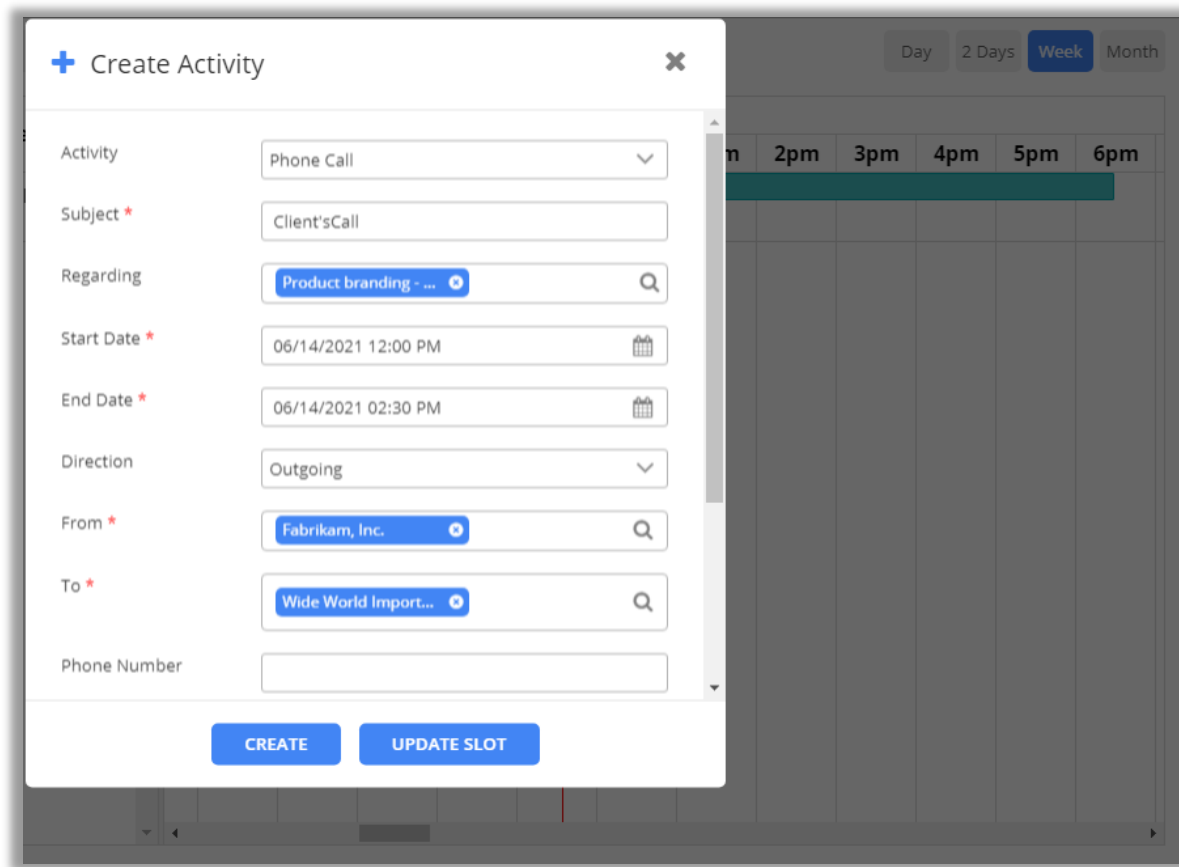
Availability
 Available
 Break
 Approve Leave
 Rejected Leave
 Pending Leave

Status
 Open Completed
 Canceled Scheduled

Priority

Create Activity as per Working Hours

- 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 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.

Manage Leaves

- If the leave is added by the team member (CRM users), it will be approved by the team manager (CRM users with Dynamics administrator rights).

+ Set Up Schedule

Availability: Mark as leave

Recurring Type: One Day

Start Date *: 06-16-2021

End Date *: 06-16-2021

Duration: 1 day

Manager: # CCADDataAnalyticsML

CREATE

- Once the leave is added by the team member, the manager will also get an Email notification regarding the leave application.

Calendar View: 13 - 19 June, 2021 (Week)

Users/Teams: Paulomi Osia

Availability Legend:

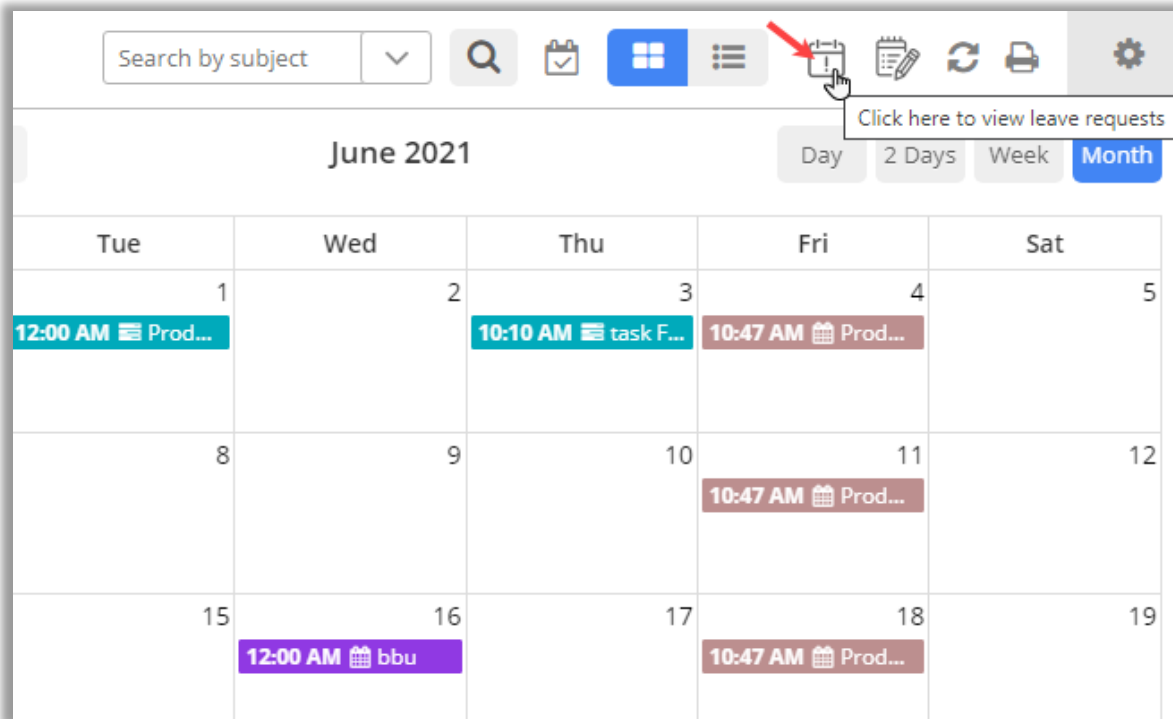
- Available
- Break
- Approve Leave
- Rejected Leave
- Pending Leave

Users/Teams	2am	1am	2am	3am	4am	5am	6am	7am	8am	9am	10am	11am	12pm
Paulomi Osia	Pending Leave (Yellow bar)												

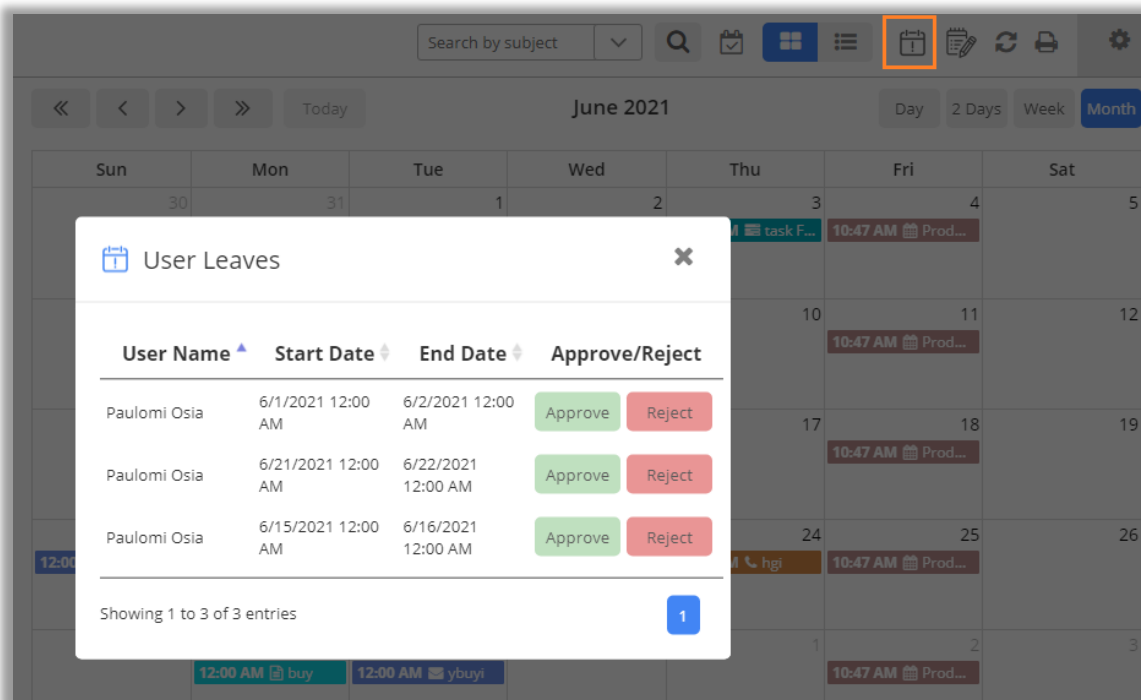
- The team member can see the Leave Approval status as per the Leave color combination from the calendar settings.

User Leaves

- You will get the Leave requests of your team members (CRM users). From the Calendar header, you will find the leave icon.



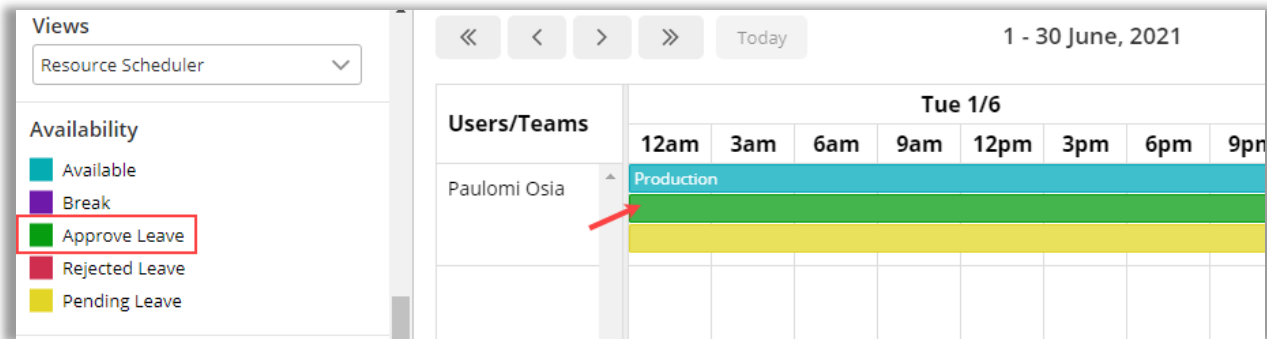
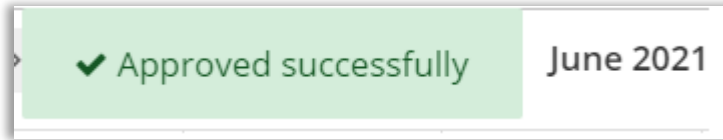
- You will get the popup named "User Leaves" with the leave requests of your team members (CRM users).



- You can **Approve/Reject** the leaves as per your requirement.

USER MANUAL: Calendar 365- "Calendar View & Functionalities"

- When you approve, you will get the approve message on the screen.



Views: Resource Scheduler

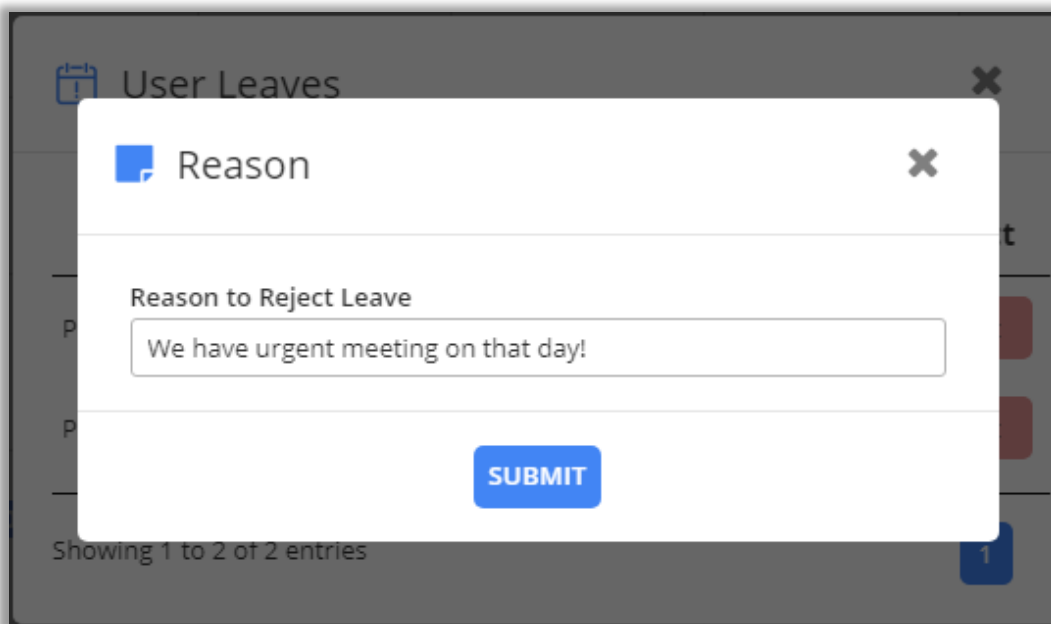
Availability:

- Available
- Break
- Approve Leave**
- Rejected Leave
- Pending Leave

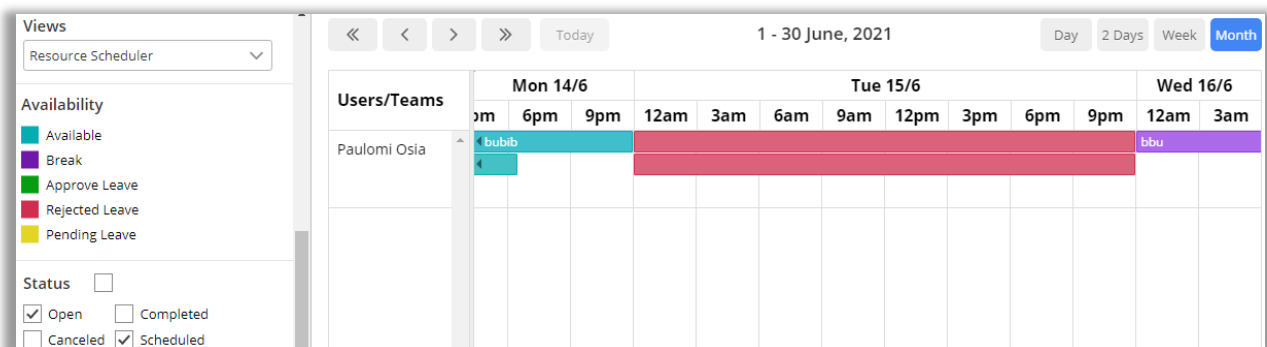
Users/Teams: Paulomi Osia

Calendar: 1 - 30 June, 2021. Tue 1/6. 12am, 3am, 6am, 9am, 12pm, 3pm, 6pm, 9pm. Production (green bar), Pending Leave (yellow bar).

- Your team member will get the Approve status in their Working hours resource.
- But when you reject the leave, you can insert the Reason behind that.



- Your team member will get the Reject status in their Working hours resource.



Views: Resource Scheduler

Availability:

- Available
- Break
- Approve Leave
- Rejected Leave**
- Pending Leave

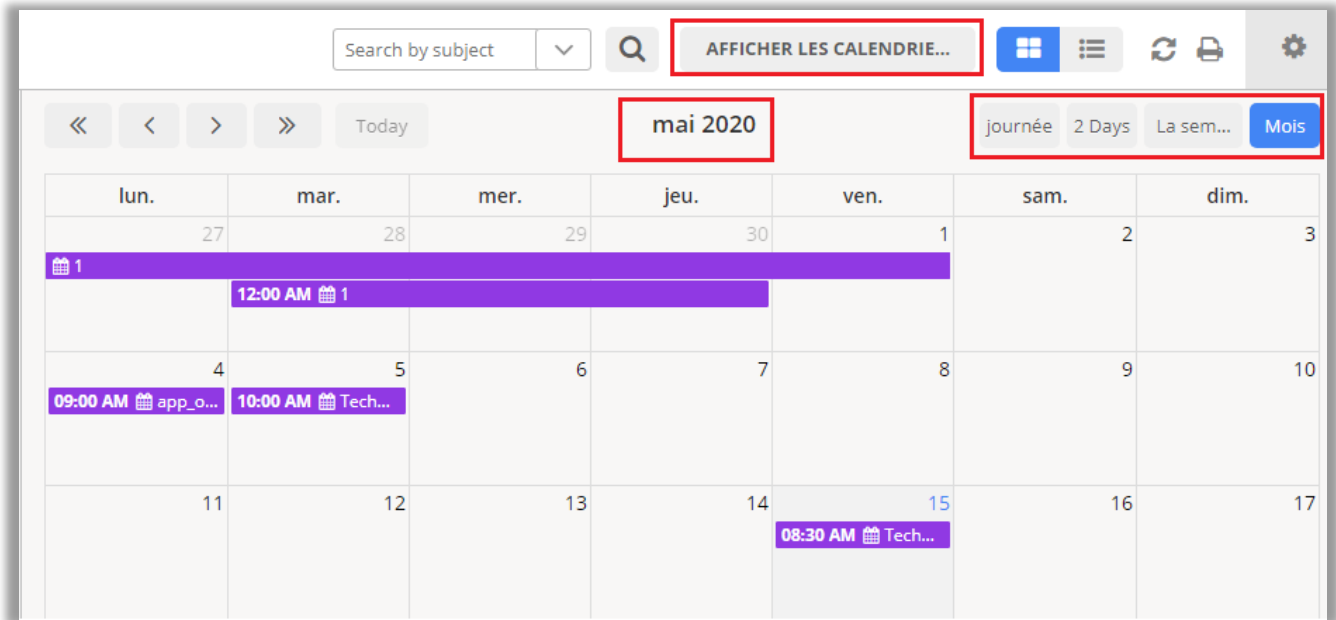
Status: Open Completed Canceled Scheduled

Users/Teams: Paulomi Osia

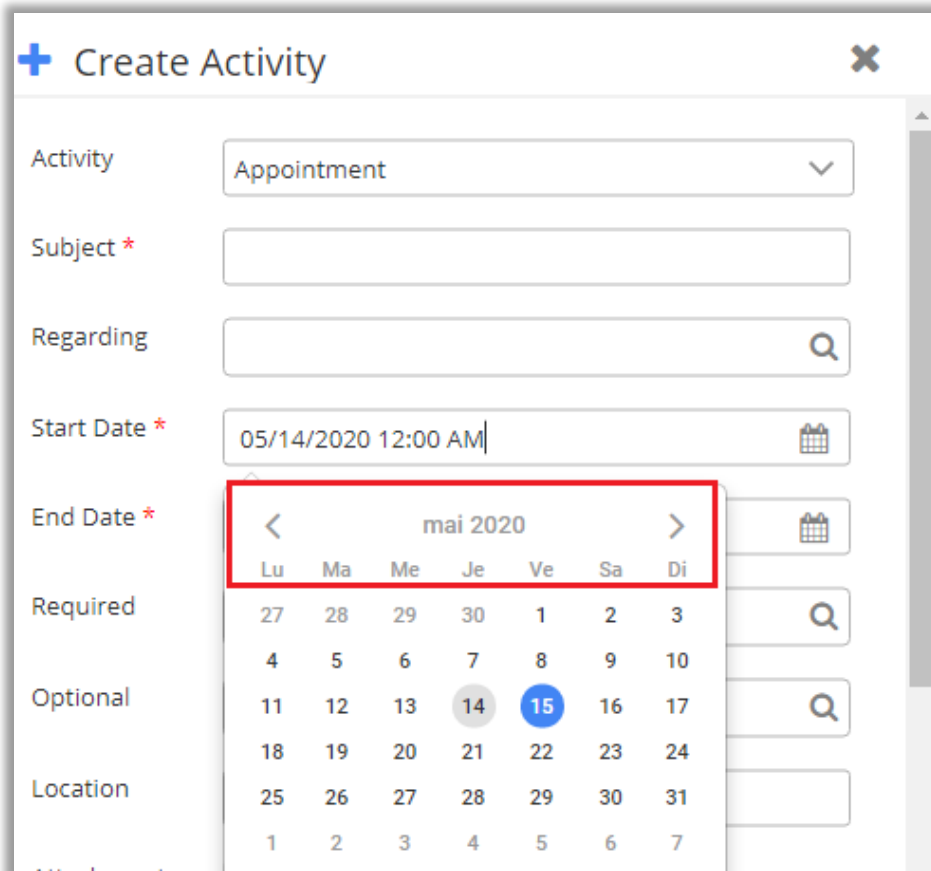
Calendar: 1 - 30 June, 2021. Mon 14/6, Tue 15/6, Wed 16/6. 9am, 6pm, 9pm, 12am, 3am, 6am, 9am, 12pm, 3pm, 6pm, 9pm, 12am, 3am. Approve Leave (blue bar), Rejected Leave (red bar), Approve Leave (blue bar).

Multi-language Calendar Labels

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

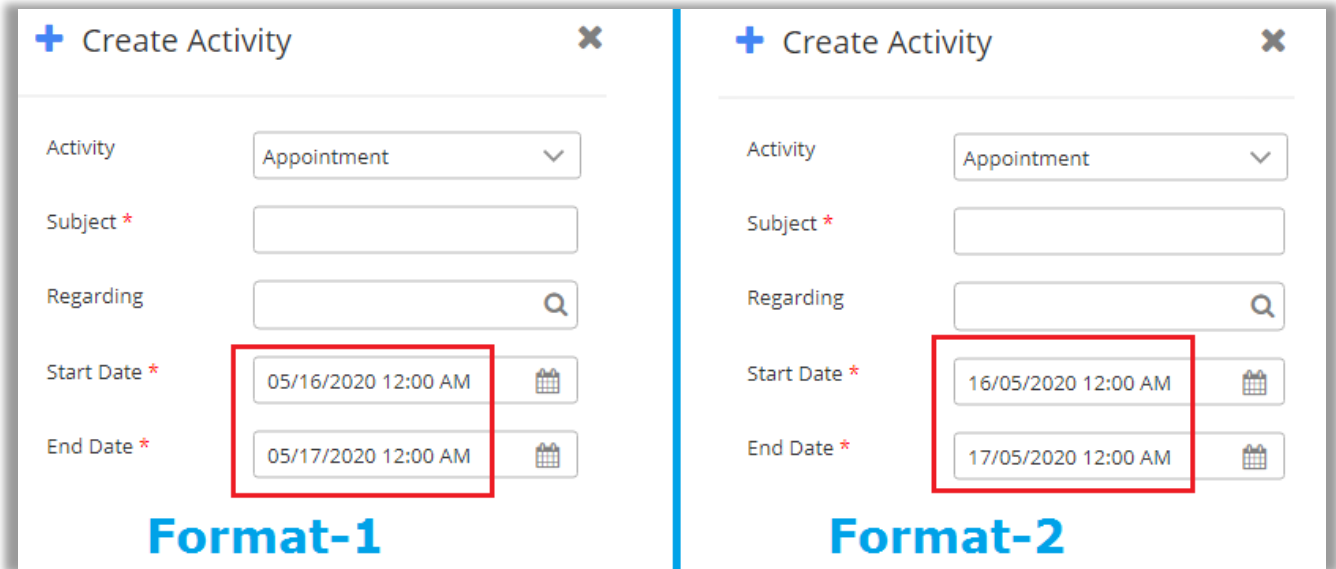


Note: To display the labels & caption in the same language, you must select the same language on the CRM side and Calendar365.



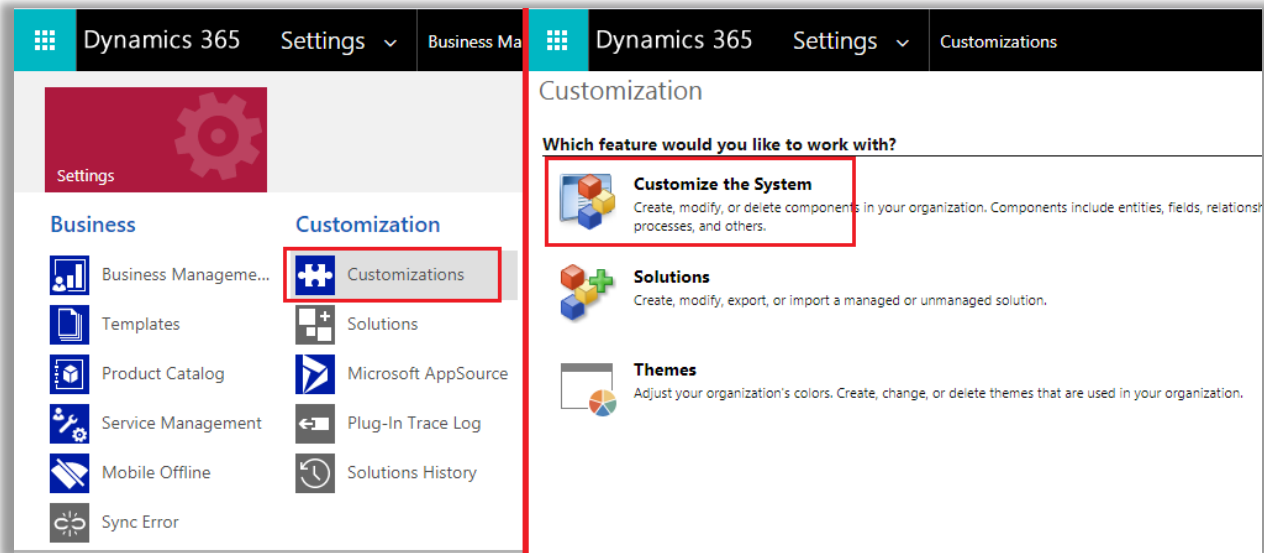
Dynamic Date formats

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

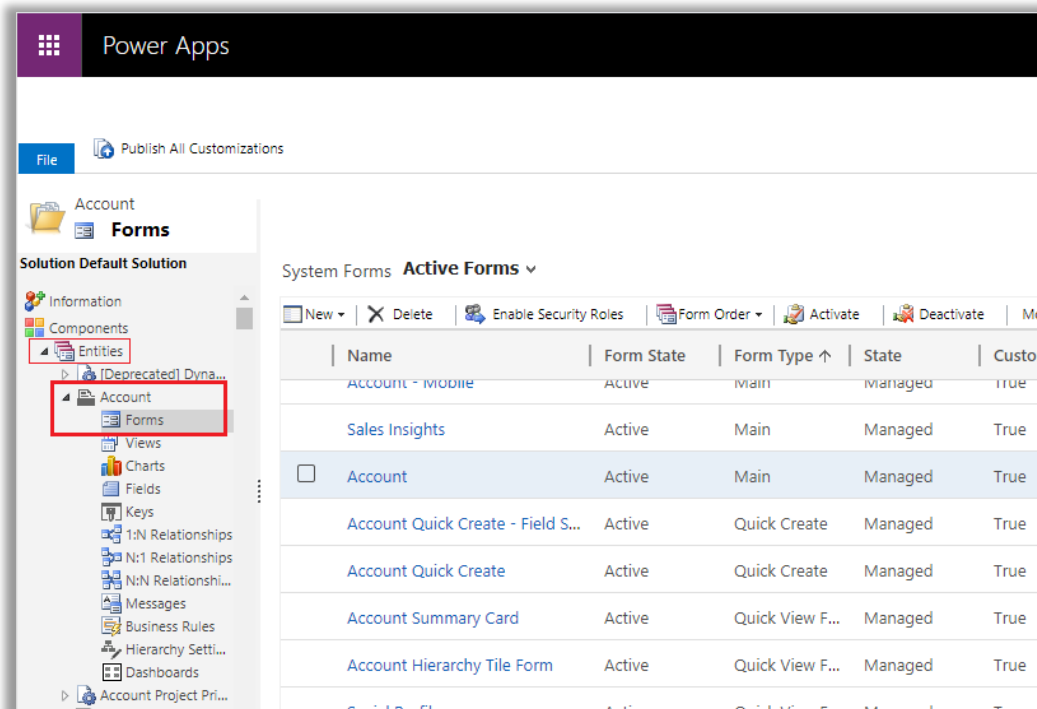


Calendar inside entity record

- You can enable the calendar of the Calendar 365 for an individual CRM entity record. You will get the activities on the calendar inside the specific entity record from the DynamicsCRM backend side.
- For that you need to configure the Form and the web resources for the entity. You need to follow the below steps to configure the calendar view inside the individual Entity record details:
 - Navigate to the DynamicsCRM **Settings** → **Customizations**. You will find the “Customize the System option” to create & modify the entity components.



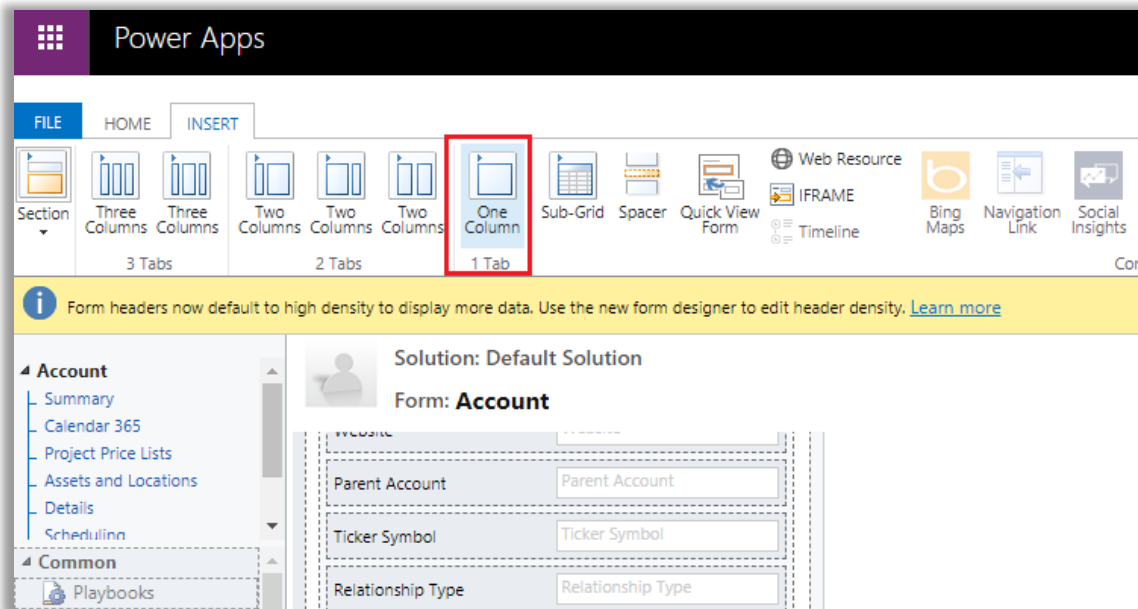
- By clicking on ‘Customize the System’, a new browser tab (Power Apps) will open to configure the components.



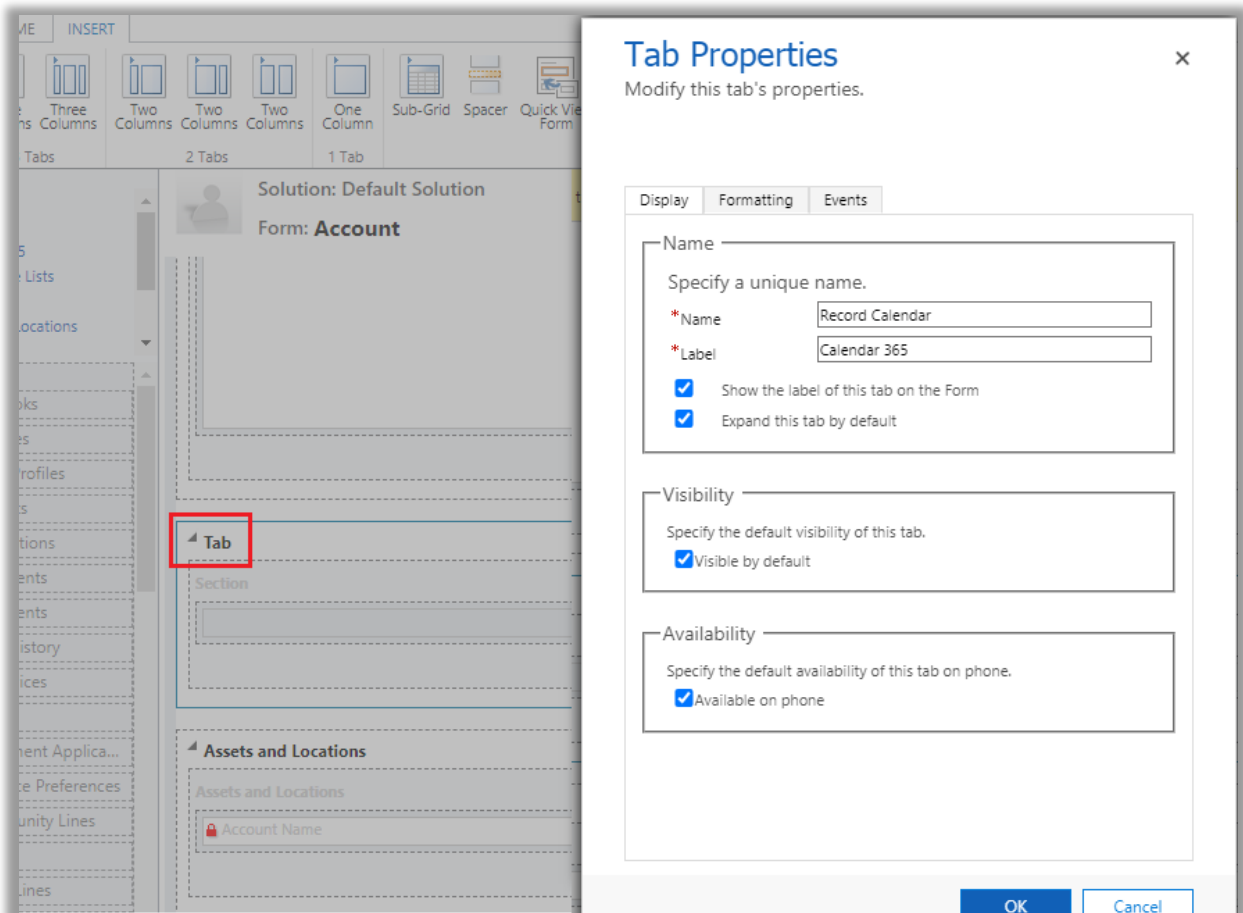
- Click on the Entity (i.e. Account) → ‘Forms’ to configure the record calendar.

USER MANUAL: Calendar 365- “Calendar View & Functionalities”

- Insert the Tab as per the layout that you want to be displayed. *i.e.* One Column. It will add a tab to the entity form.

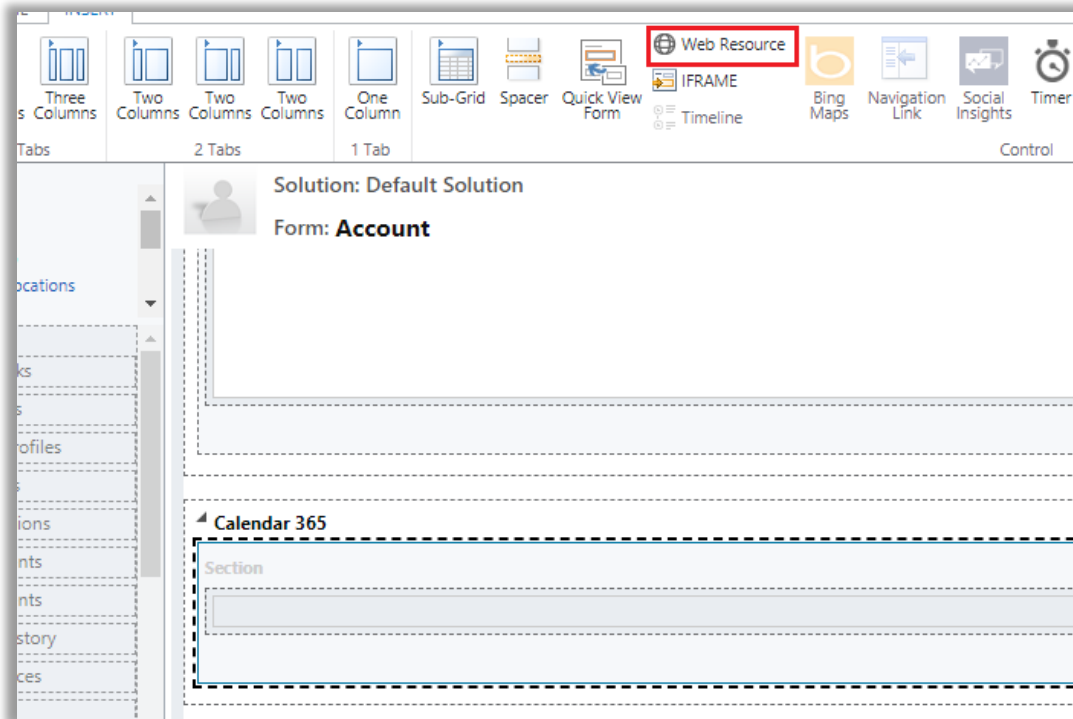


- Once the new tab is inserted in the entity form, double click on the tab, a “Tab Properties” popup will appear.

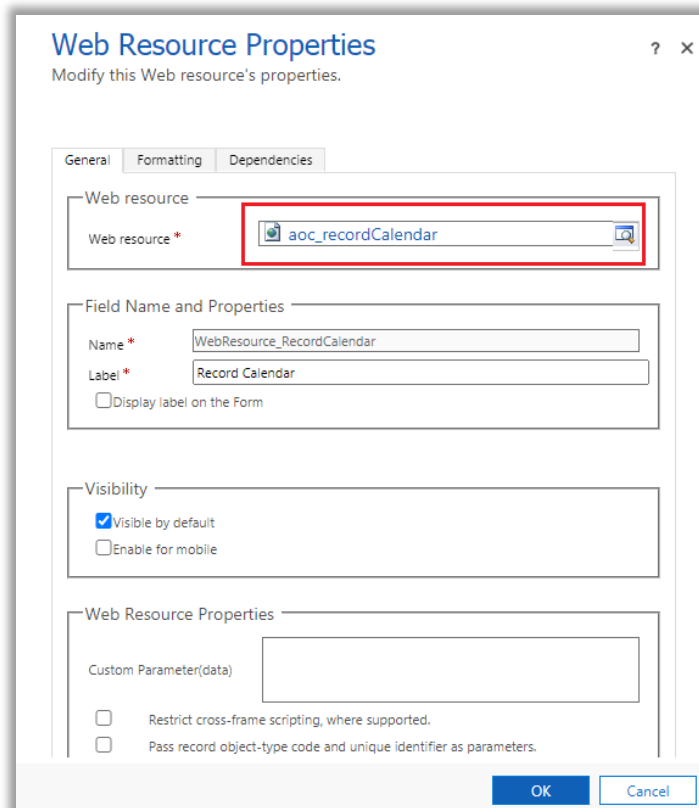


- Insert the “Name” & “Label” for the form and press OK button.

- Add “Web Resource” to the form that will display the record calendar inside the tab of the entity record.

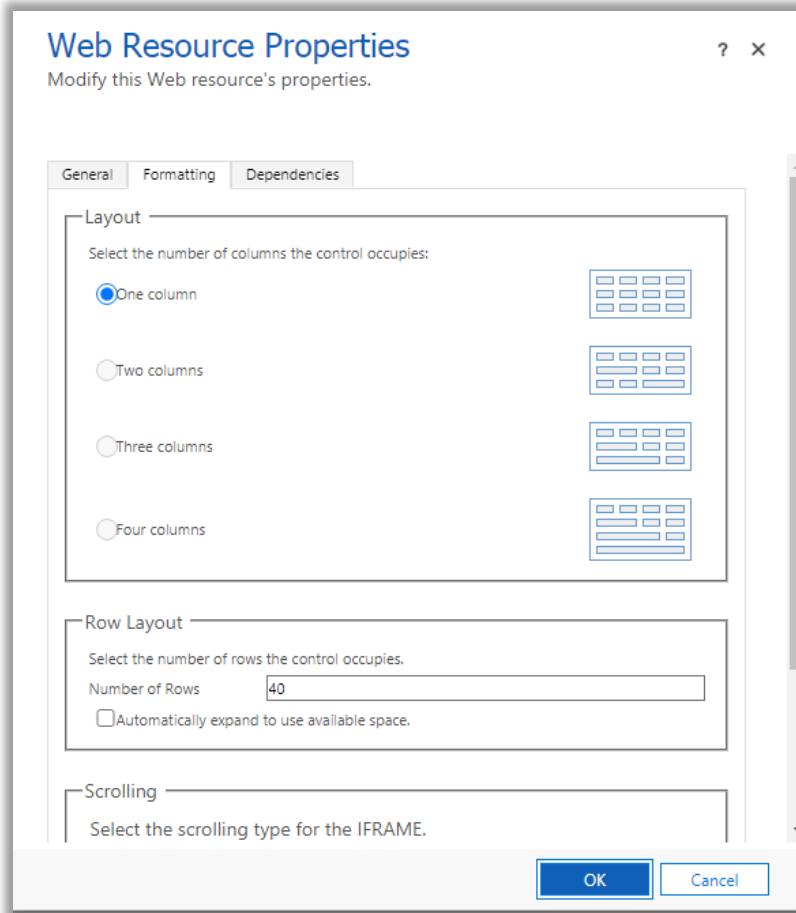


- Now, click on the Web Resource (double click), to configure the properties. Select the Web resource from the Lookup Records. Insert Web resource, Label, Name.

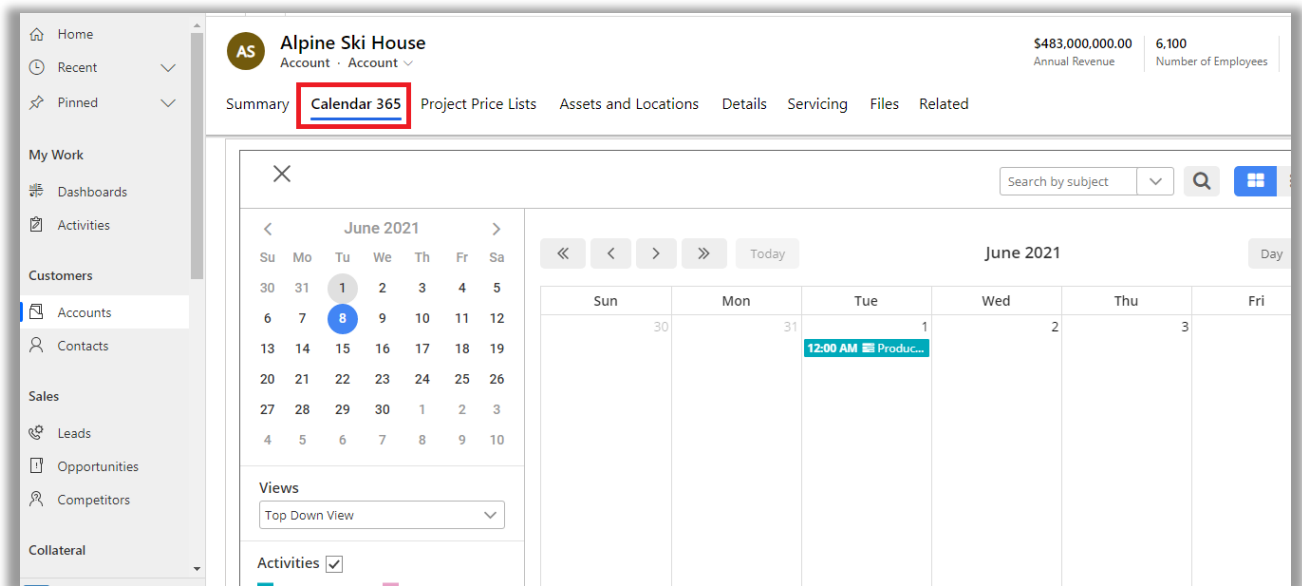


- Select **aoc_recordCalendar** as Web resource.

- You need to select the Formatting for the Layout to adjust the calendar in the proper format.



- You need to select the Formatting for the Layout to adjust the calendar in the proper format. Press **OK** to save the properties.
- Now, navigate to the entity record (account entity), you will find the record calendar there.

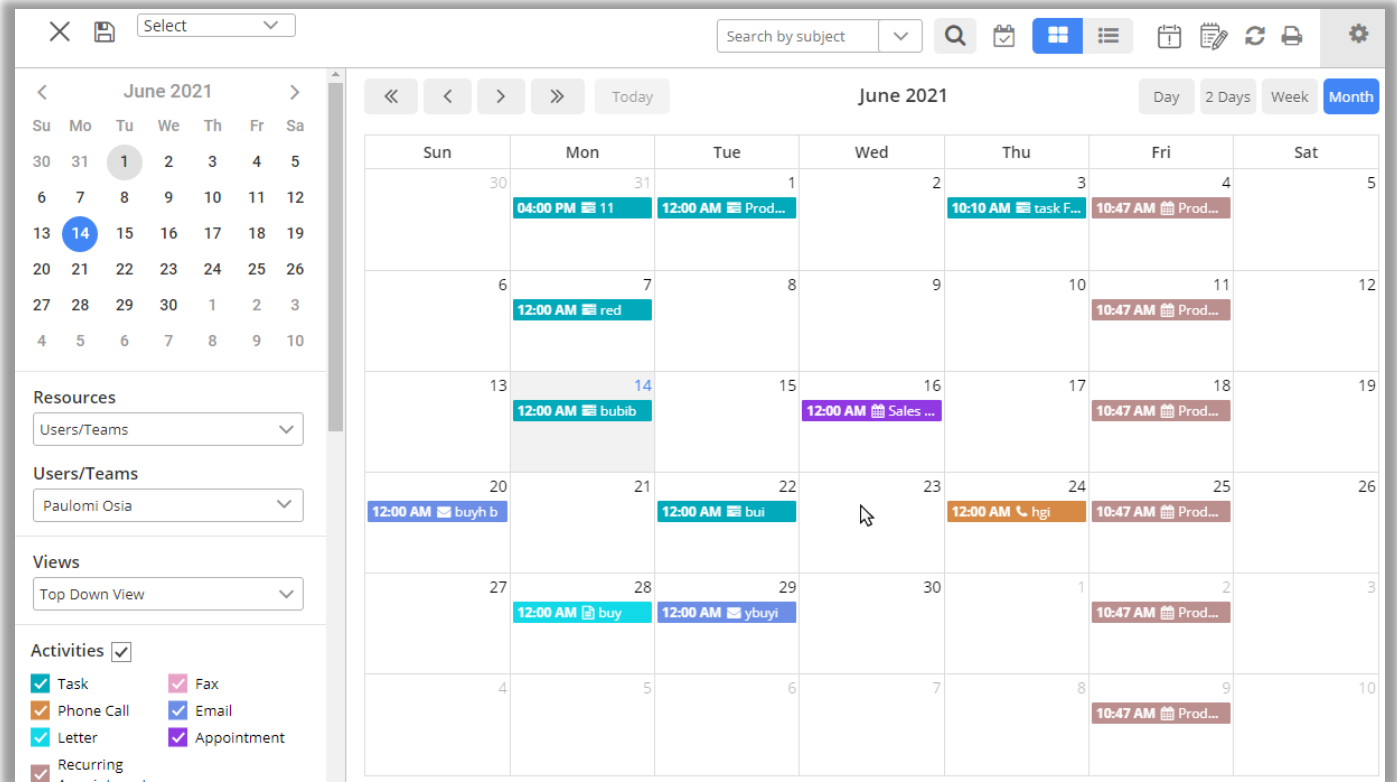


- You will get the new tab as you have configured. By clicking on it, you will get the record calendar. You can check the calendar activities for the individual records.

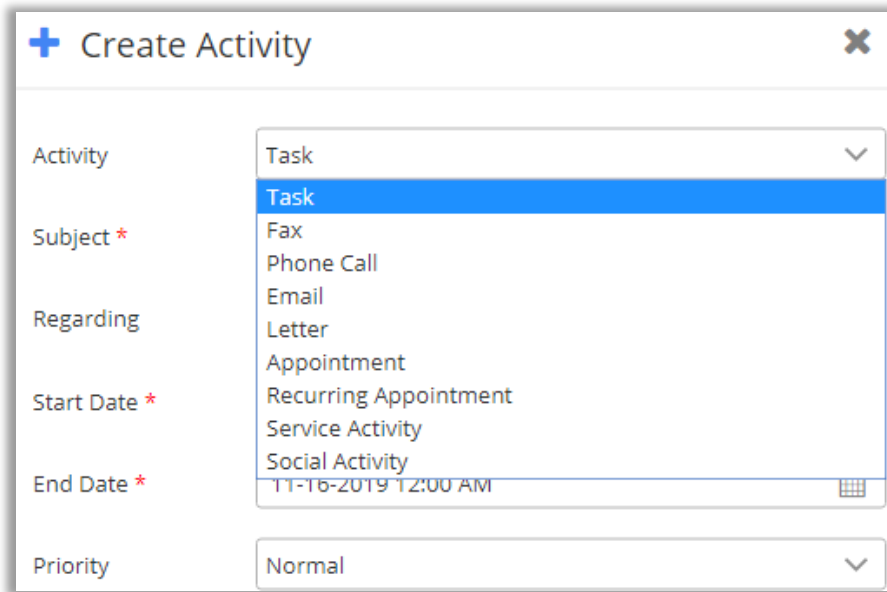
Calendar Activities

Create an Activity

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



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



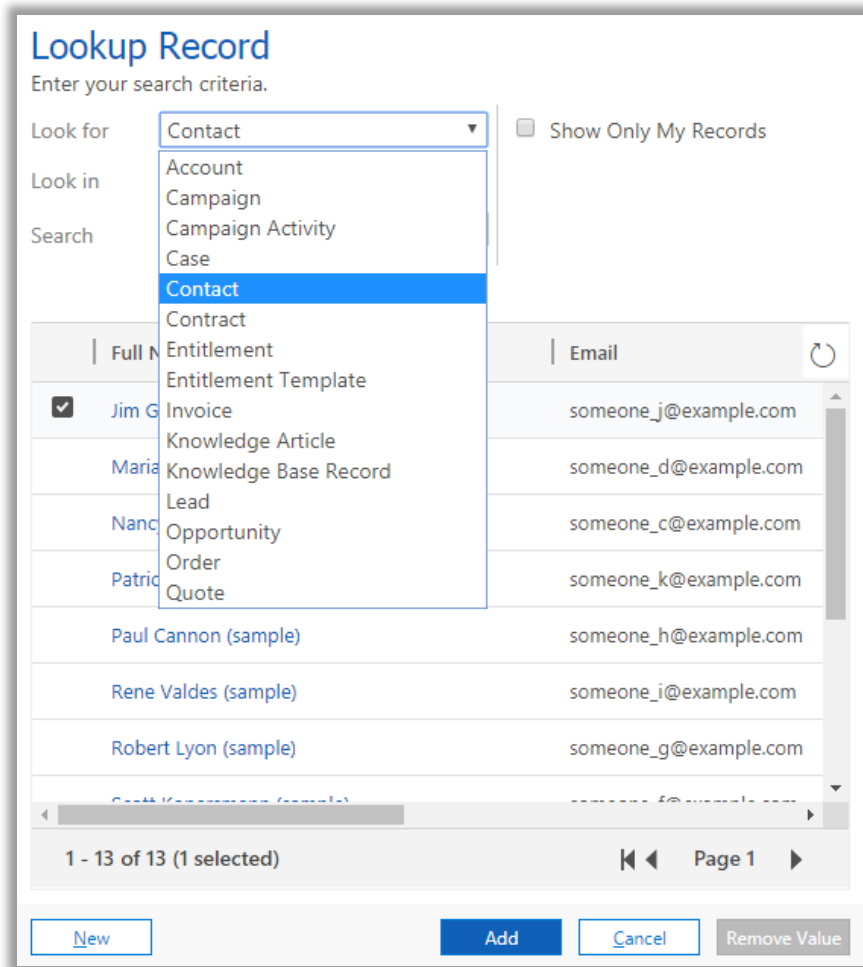
- **Activity:** Select the type of activity you want to create.
- **Subject:** Enter the subject of the activity.
- **Regarding:** Mention the Account, Contact, or any other record with which activity is concerned.

The screenshot shows a 'Create Activity' dialog box with the following fields and values:

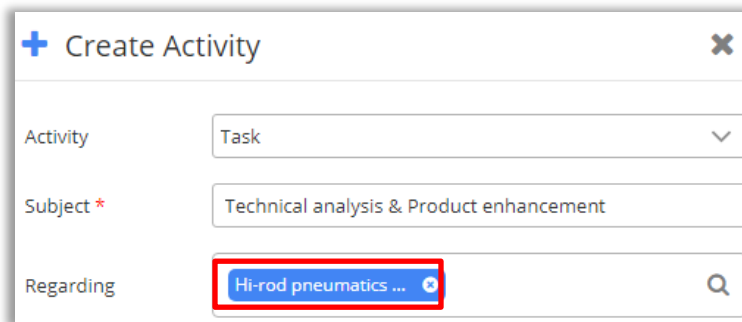
- Activity:** Task
- Subject *:** Technical Analysis & Prod. enhancement
- Regarding:** (Empty text input with search icon)
- Start Date *:** 06/23/2021 12:00 AM
- End Date *:** 06/24/2021 12:00 AM
- Priority:** Normal
- Description:** (Empty text area)
- Owner:** Paulomi Osia

A blue **CREATE** button is located at the bottom of the dialog.

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



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



- Selected record can be seen in Regarding edit box.

The screenshot shows a 'Create Activity' dialog box with the following fields and values:

- Activity: Task
- Subject *: Technical Analysis & Prod. enhancement
- Regarding: Fabrikam, Inc.
- Start Date *: 06/23/2021 12:00 AM
- End Date *: 06/24/2021 12:00 AM
- Priority: Normal
- Description: Product-related technical discussion & strategy
- Owner: Paulomi Osia

A red box highlights the Start Date, End Date, Priority, Description, and Owner fields. A blue 'CREATE' button is located at the bottom of the form.

- **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.

USER MANUAL: Calendar 365- "Calendar View & Functionalities"

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

The screenshot displays the Microsoft Calendar 365 interface. On the left, there is a navigation pane with a calendar grid for June 2021, showing the current date (14th) highlighted. Below the calendar are sections for Resources (Users/Teams), Users/Teams (Paulomi Osia), Views (Top Down View), and Activities (Task, Phone Call, Letter, Recurring, Fax, Email, Appointment). The main calendar area shows a monthly view for June 2021, with a search bar and navigation controls. The calendar grid displays days from Sunday to Saturday, with various colored activity bars representing tasks and appointments. A red arrow points to a specific activity on Tuesday, June 22nd.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
	04:00 PM 11	12:00 AM Prod...		10:10 AM task F...	10:47 AM Prod...	
6	7	8	9	10	11	12
	12:00 AM red				10:47 AM Prod...	
13	14	15	16	17	18	19
	12:00 AM bubib		12:00 AM Sales ...		10:47 AM Prod...	
20	21	22	23	24	25	26
12:00 AM buyh b		12:00 AM bui	09:00 AM Tech...	12:00 AM hgr	10:47 AM Prod...	
27	28	29	30	1	2	3
	12:00 AM buy	12:00 AM ybuyi			10:47 AM Prod...	
4	5	6	7	8	9	10
					10:47 AM Prod...	

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.

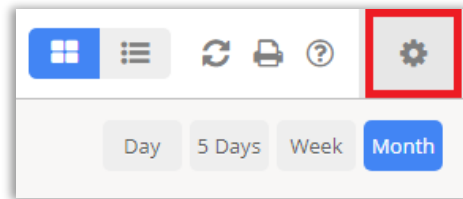
Navigation: << < > >> Today 23 December, 2020 Day 2 Days Week Month

Milenia Den

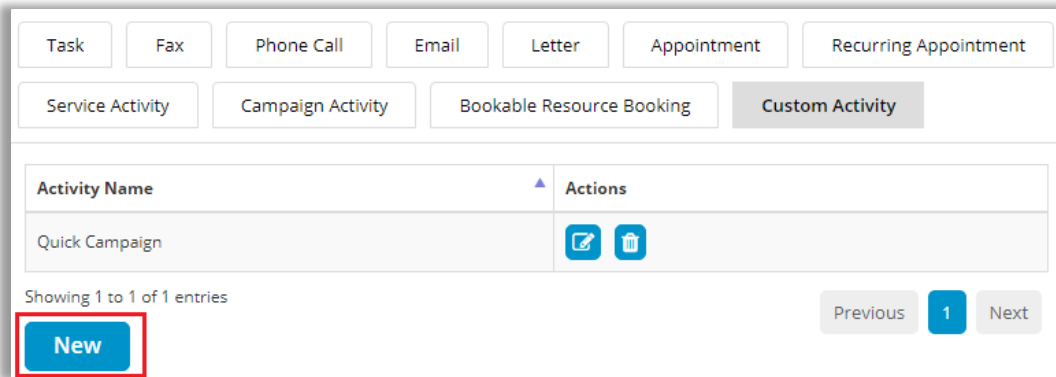
All day	📅 Machinery Maintenance
8am	
9am	
10am	

Create a Custom Activity

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

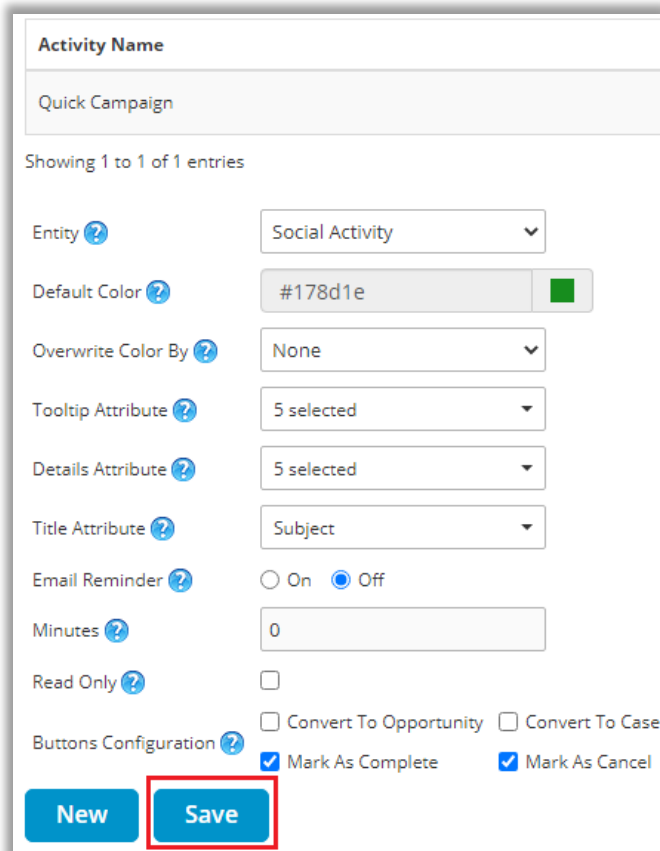


- Click on 'Custom Activity' tab under 'Activities' section.







- 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.










- 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

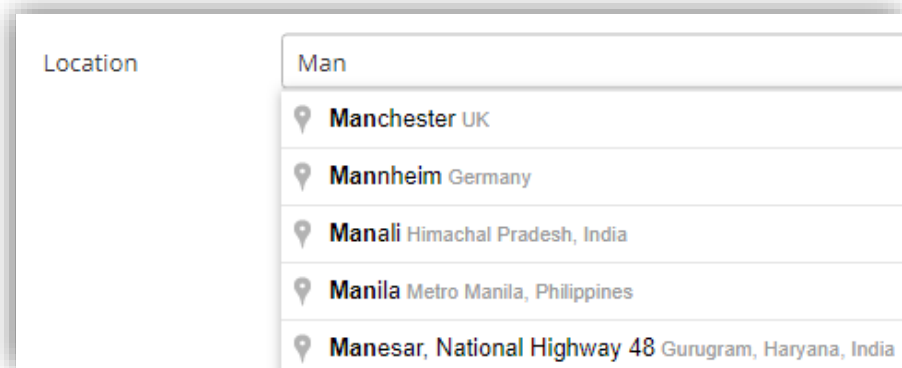
Priority: Normal

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.

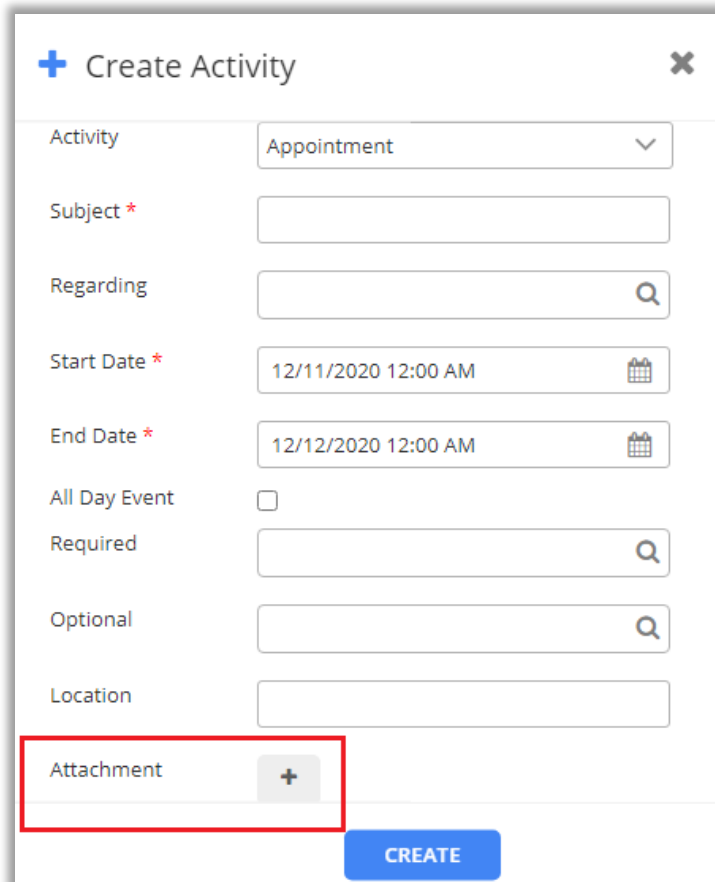


A screenshot of a location selection interface. On the left, the word "Location" is displayed. To its right is a search input field containing the text "Man". Below the input field, a list of location suggestions is shown, each preceded by a location pin icon. The suggestions are: "Manchester UK", "Mannheim 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'.

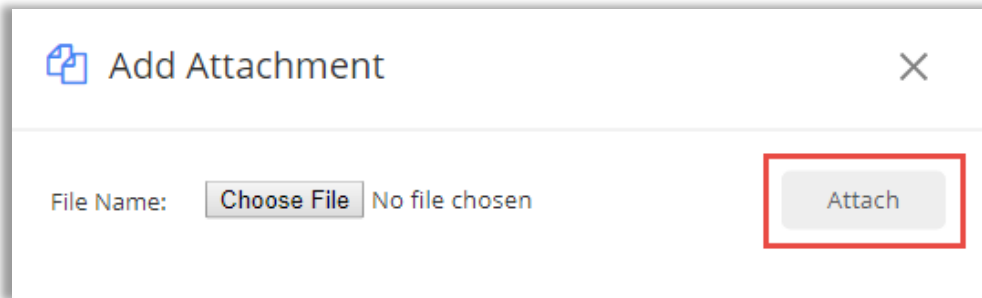
Attachment for Activity

- 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.

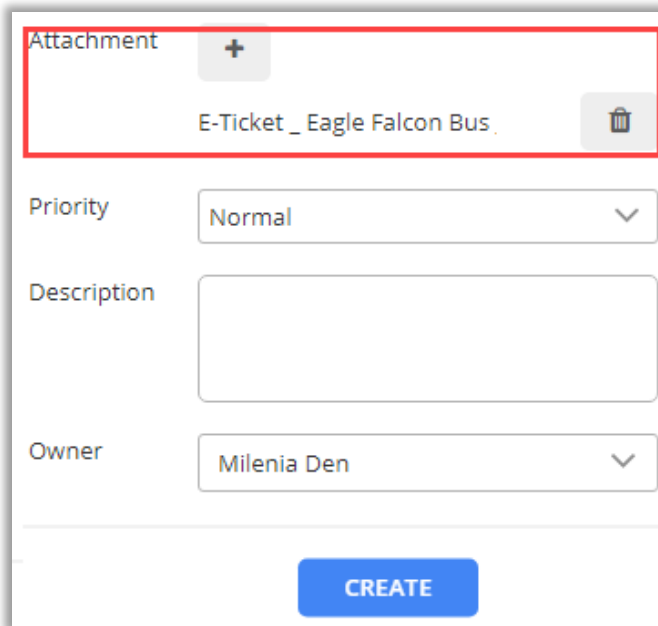


A screenshot of the "Create Activity" form. The form has a title bar with a plus icon and a close icon. The form contains several fields: "Activity" (a dropdown menu set to "Appointment"), "Subject *" (a text input field), "Regarding" (a text input field with a search icon), "Start Date *" (a date and time picker set to "12/11/2020 12:00 AM"), "End Date *" (a date and time picker set to "12/12/2020 12:00 AM"), "All Day Event" (a checkbox), "Required" (a text input field with a search icon), "Optional" (a text input field with a search icon), and "Location" (a text input field). At the bottom of the form, there is an "Attachment" field with a plus icon next to it, which is highlighted with a red box. Below the form is a blue "CREATE" button.

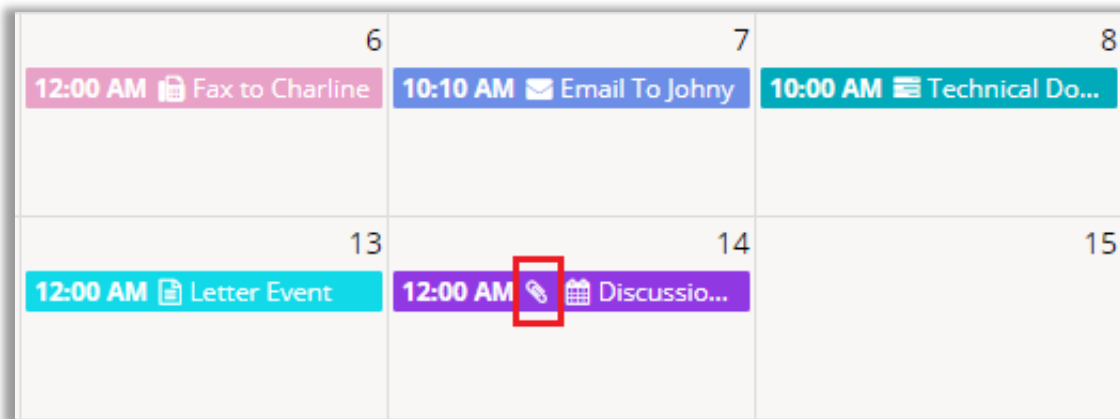
- Now choose the file to be attached as attachment and click on 'Attach' button.



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

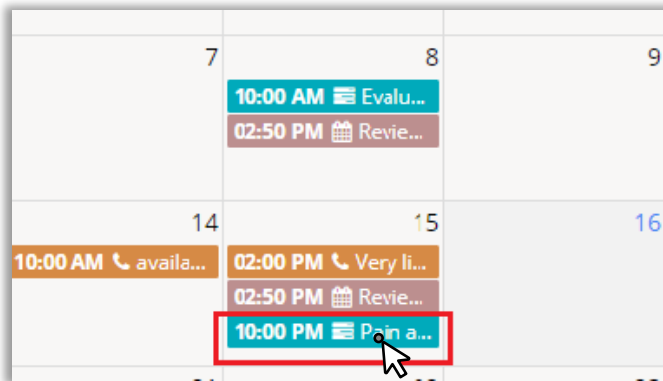


- Thereafter click on **Create** button to complete activity creation with attachment.
- 'Attachment' icon will be displayed on the activities in the calendar for which the attachments were added.

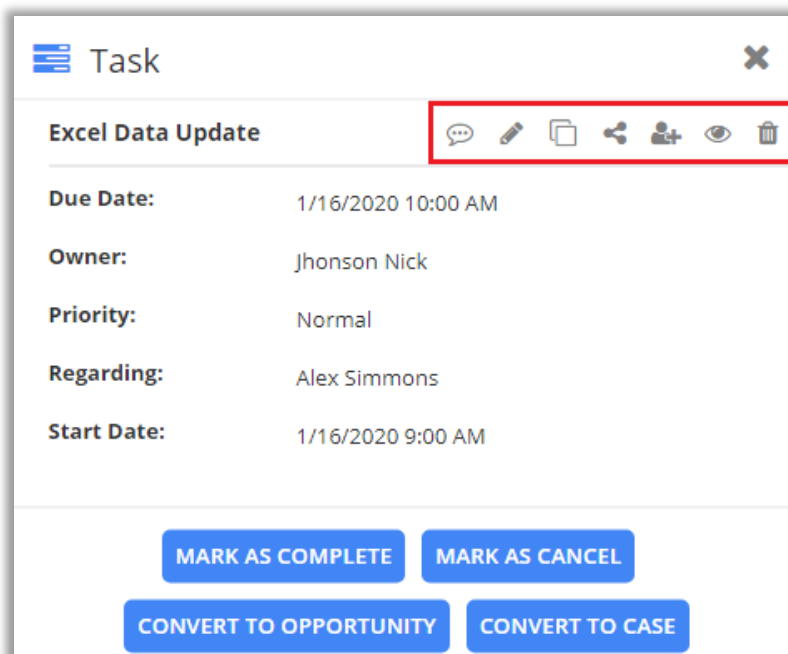


View & Manage Activity

- 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:




- 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

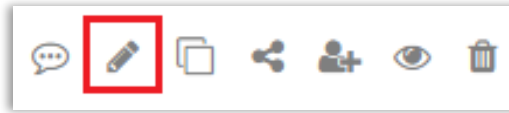
sd
cvbnm
Jhonson Nick - 1/6/2020 2:42 PM


- 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.





 Update Activity ✕

Activity


Subject *


Regarding 

Start Date * 

End Date * 

Direction

From * 

To * 

Phone Number

- 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: [Search]

Customers: [Search]

Resources: [Search]

Start Date *: 07-16-2019 12:00 AM [Calendar]

End Date *: 07-17-2019 12:00 AM [Calendar]

Location: Enter a location

CREATE

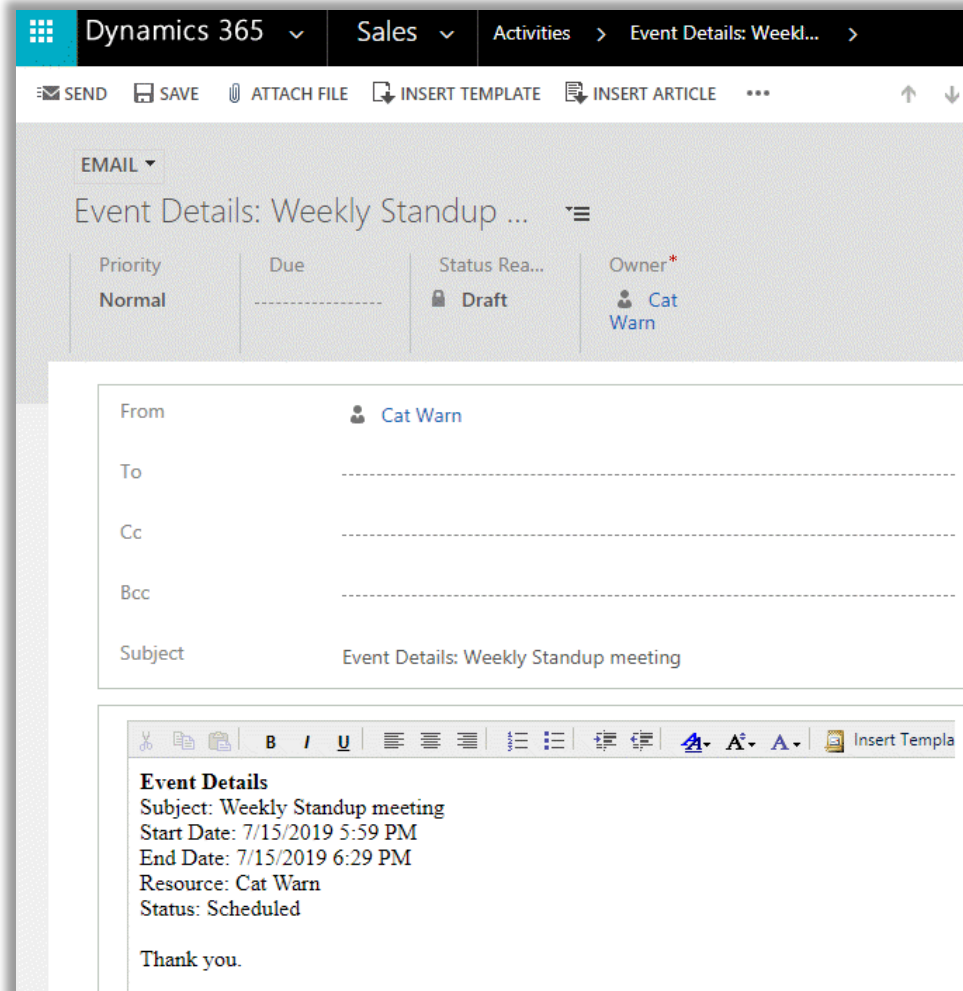
- Click on **Create** button to complete the activity creation. If you don't edit and save it as it is, it would create a duplicate of the activity.

Share Activity

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

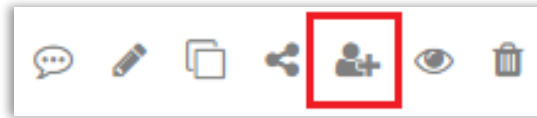


- Clicking on icon, it redirects to CRM page to email the activity details.



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

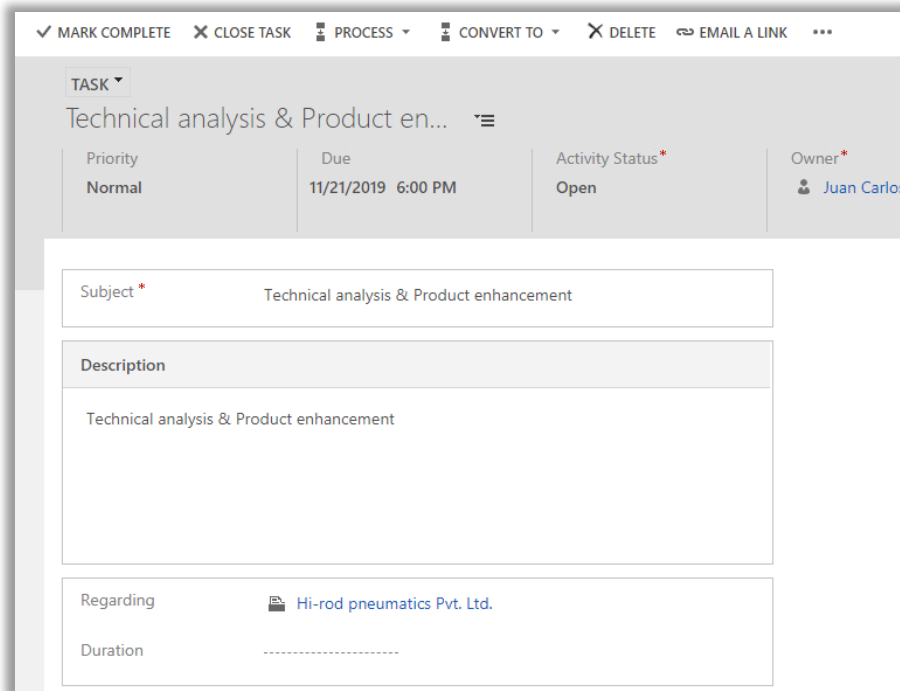
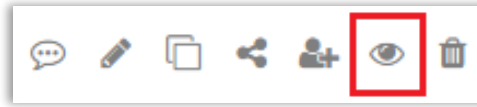
- Mark Carlos
- Rene Carlos

- 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.

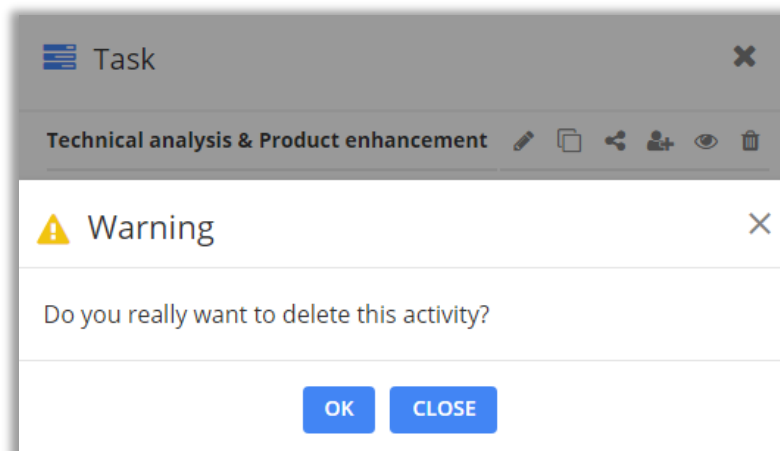


Delete Activity

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

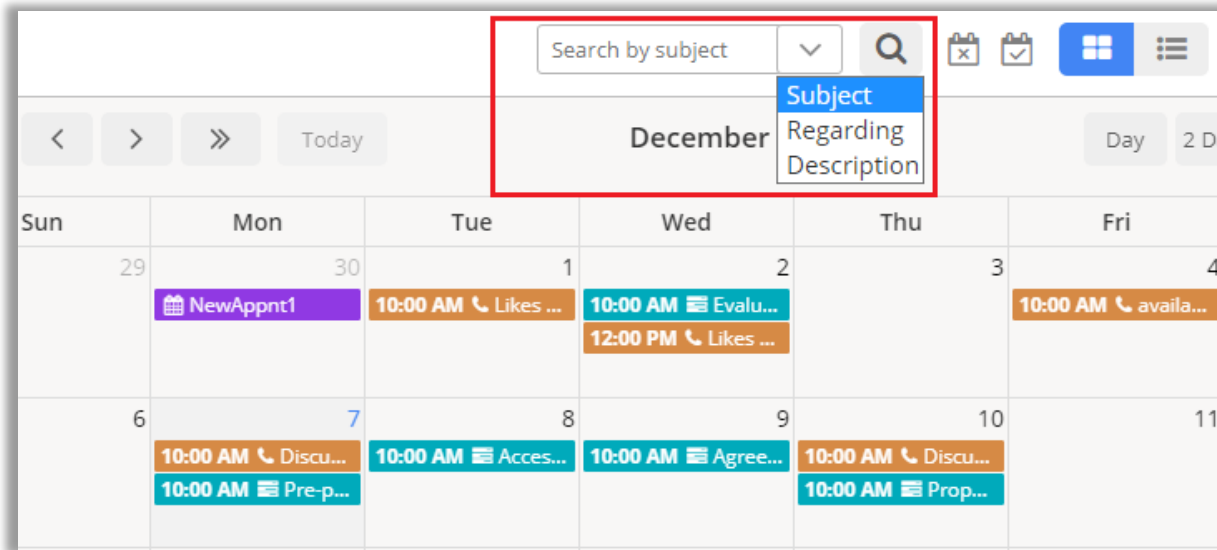


- Clicking on Delete icon, a warning pop up message will appear to confirm the action.



Search Activity

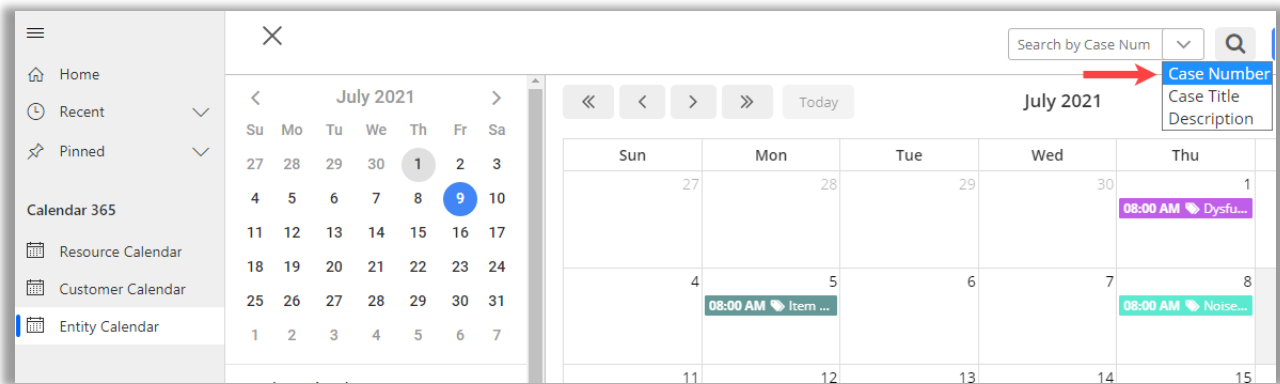
- You can search any activity by three options: **Subject**, **Regarding** and **Description** that are inserted in the activities.
- Select any search option among three and click on search icon and it will show all activities with that keyword in the search text box.



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

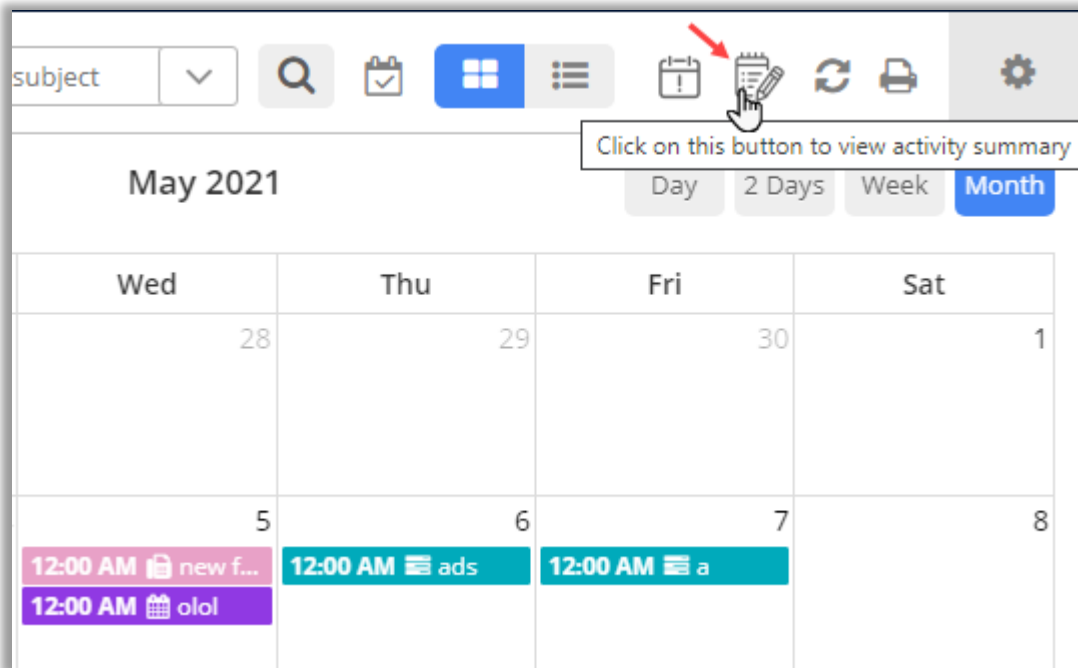
Search For Entity Records

- You can search the entity records as you have enabled from the entity configuration in the "Search By Attribute" option.

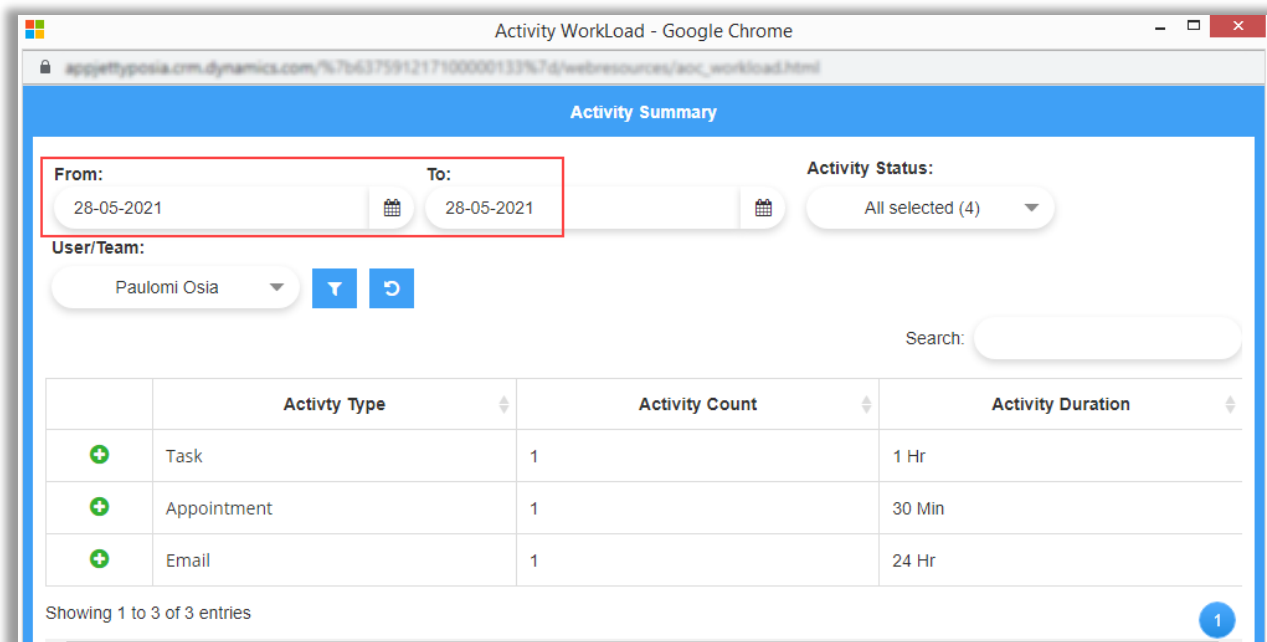


Activity Summary (Workload)

- If you have enabled the Workload Report from the Calendar settings, only then you will get this ‘Report’ icon. By clicking on it, you can get the activities for the specific filter.



- You will redirect to the new Webpage named “Activity Workload”. You can filter & search the activities as per the Date selection & User/Team selection.



- By default, you will get the listing of the records based on the “Activity Type” as per the current day (date). You can select the following filter options:
 - From – To: It’s a date range, you can get the activity records between the date selection.

USER MANUAL: Calendar 365- “Calendar View & Functionalities”

- Activity Status: Filter the activities based on its Status: Open, Completed, Cancelled, Scheduled & All.
 - User/Team: Select the required team members (user/team) to check their activities as well if any.
 - Filter: Click on the Filter icon to get the activity results as per the selected details.
 - Refresh: Reset the filter selection. By clicking on the ‘Reset’ icon, the activity records will disappear, and the current date activity records will be listed.
 - Activity Type: You will get the activities under the Activity Type. By clicking on the ‘+’ icon, you will get the activity records.
 - Activity Count: You will get the total count how many activity records for that Activity Type.
 - Activity Duration: You will get the total Duration (Hrs) of all the activity records for its type.
- Here the filter options are selected for the specific date range. By clicking on the Filter icon, you will get the activity records in under the Activity Type.

The screenshot displays the 'Activity Summary' interface. At the top, there are filter options for 'From' (21-05-2021), 'To' (28-05-2021), and 'Activity Status' (All selected (4)). Below these, the 'User/Team' filter shows '3 selected' with a dropdown arrow and two icons (a blue triangle and a blue circle with a white arrow). A search bar is located to the right of the filters. The main content is a table with three columns: 'Activity Type', 'Activity Count', and 'Activity Duration'. Each row in the table has a green plus icon in the first column. The table lists five activity types: Task, Phone Call, Letter, Appointment, and Email. At the bottom left, it says 'Showing 1 to 5 of 5 entries' and at the bottom right, there is a blue circle with the number '1'.

	Activity Type	Activity Count	Activity Duration
+	Task	4	33.916666666666664 Hr
+	Phone Call	1	24 Hr
+	Letter	1	24 Hr
+	Appointment	5	51 Hr
+	Email	2	48 Hr

- By clicking on the ‘+’ icon, you will get the activity records as per the Activity Type.

Activity Summary

From: 21-05-2021 To: 28-05-2021 Activity Status: All selected (4)

User/Team: Paulomi Osia

Search:

	Activity Type	Activity Count	Activity Duration
-	Task	4	33.916666666666664 Hr

Search:

Activity Name	Status	Regarding	Start Time	End Time	Activity Duration	Action
task 1	Open	3D Printers	5/26/2021 4:35 PM	5/27/2021 12:00 AM	7.416666666666667 Hr	
task:001	Open	Abraham McCormick	5/25/2021 12:00 AM	5/26/2021 12:00 AM	24 Hr	
Task:01	Open	-	5/27/2021 9:00 PM	5/27/2021 10:30 PM	1.5 Hr	
tr	Open	-	5/28/2021 5:00 PM	5/28/2021 6:00 PM	1 Hr	

Showing 1 to 4 of 4 entries 1

+	Phone Call	1	24 Hr
+	Letter	1	24 Hr

- You can see all the activities with some details in the grid view. You can check the activity details by clicking on the 'view' icon.

Recurring Appointment

+ Create Activity

Activity: Recurring Appointment

Subject *: Product Analysis

Regarding: Vincent Lauriant

Required: A. Datum, Trey Research, Best o' Sales, Contoso, Ltd

Optional: Adventure Works, Alpine Ski House, Blue Yonder Airlines, Coho Winery, Fabrikam, Inc., Lucerne Publishing

Location:

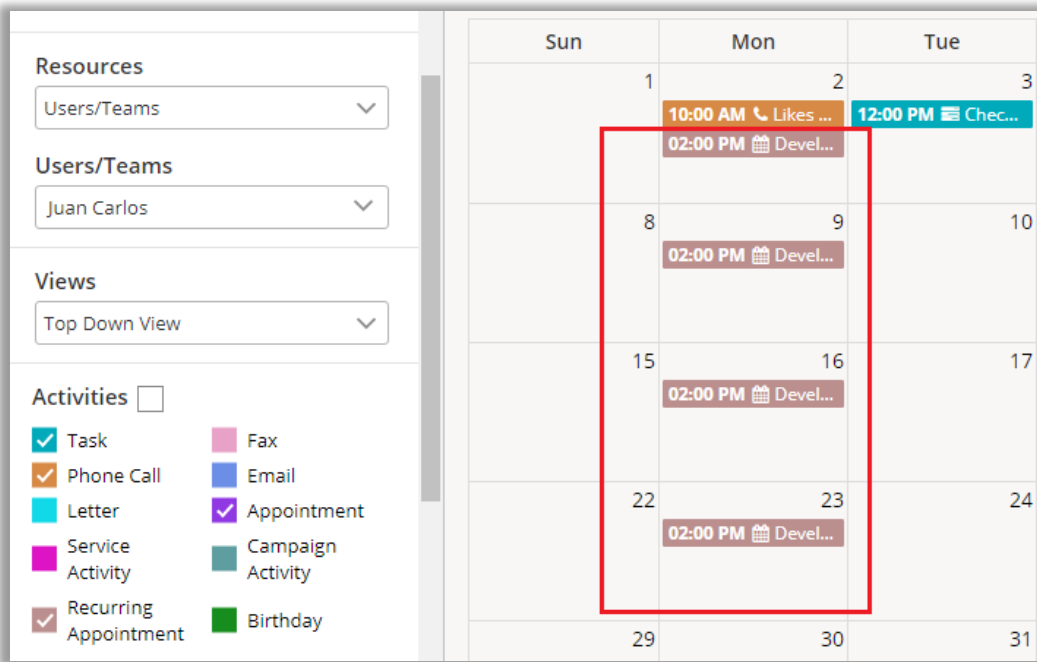
Priority: Normal

Set Recurrence

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.

- 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.

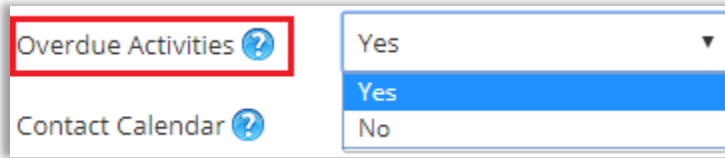
- While creating the activities in which multiple resources are selected, the activity will automatically be assigned to the resources and those activities will be displayed in their calendar as well.
- In appointment activity, one needs to mention required and optional users while in case of other activities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

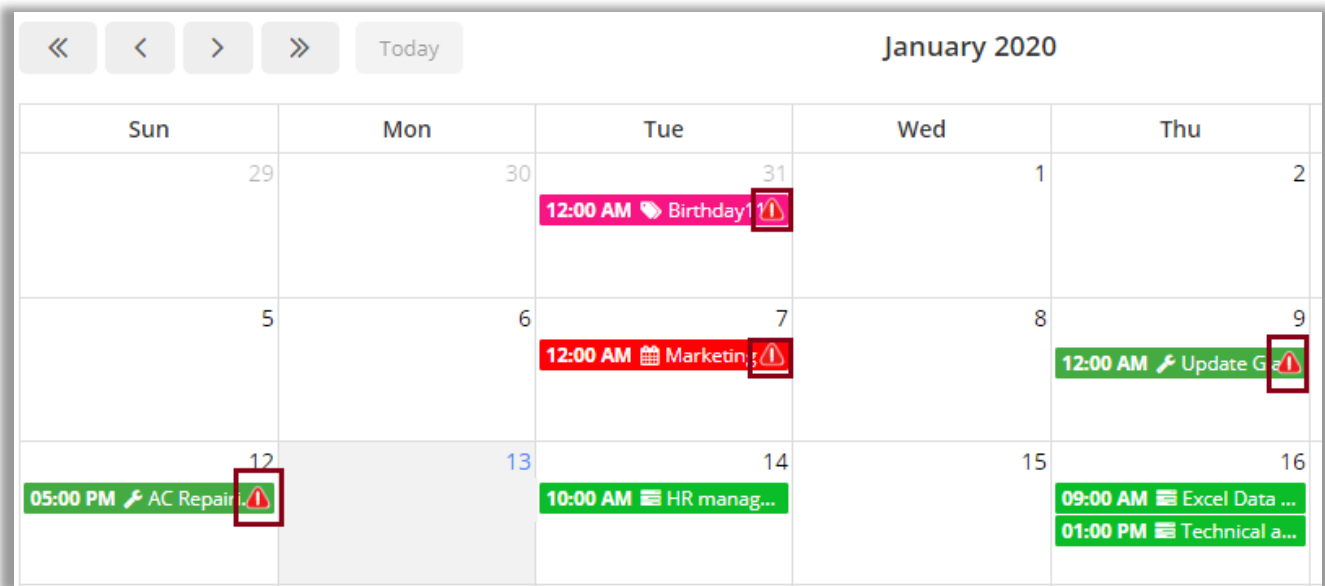
- You can configure 'Overdue Activities' by selecting 'Yes'.



The image shows a configuration dropdown menu. The label 'Overdue Activities' is highlighted with a red box. The dropdown is open, showing 'Yes' selected and 'No' as an option. Below it, the label 'Contact Calendar' is visible.

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.

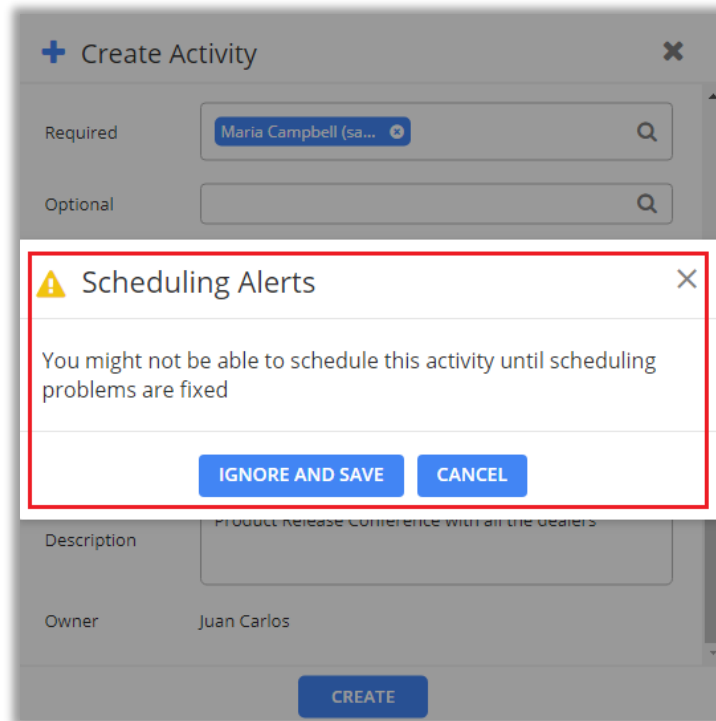


The screenshot shows a calendar for January 2020. The calendar is in a week view. The days of the week are Sun, Mon, Tue, Wed, Thu. The dates are 29, 30, 31, 1, 2, 5, 6, 7, 8, 9, 12, 13, 14, 15, 16. The calendar shows several activities with red warning icons:

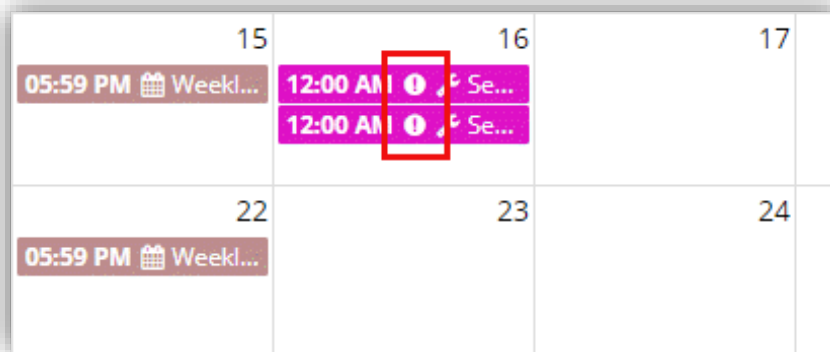
- 12:00 AM Birthday (Tue, 31)
- 12:00 AM Marketing (Tue, 7)
- 12:00 AM Update G (Thu, 9)
- 05:00 PM AC Repair (Sun, 12)
- 10:00 AM HR manag... (Tue, 14)
- 09:00 AM Excel Data ... (Thu, 16)
- 01:00 PM Technical a... (Thu, 16)

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.



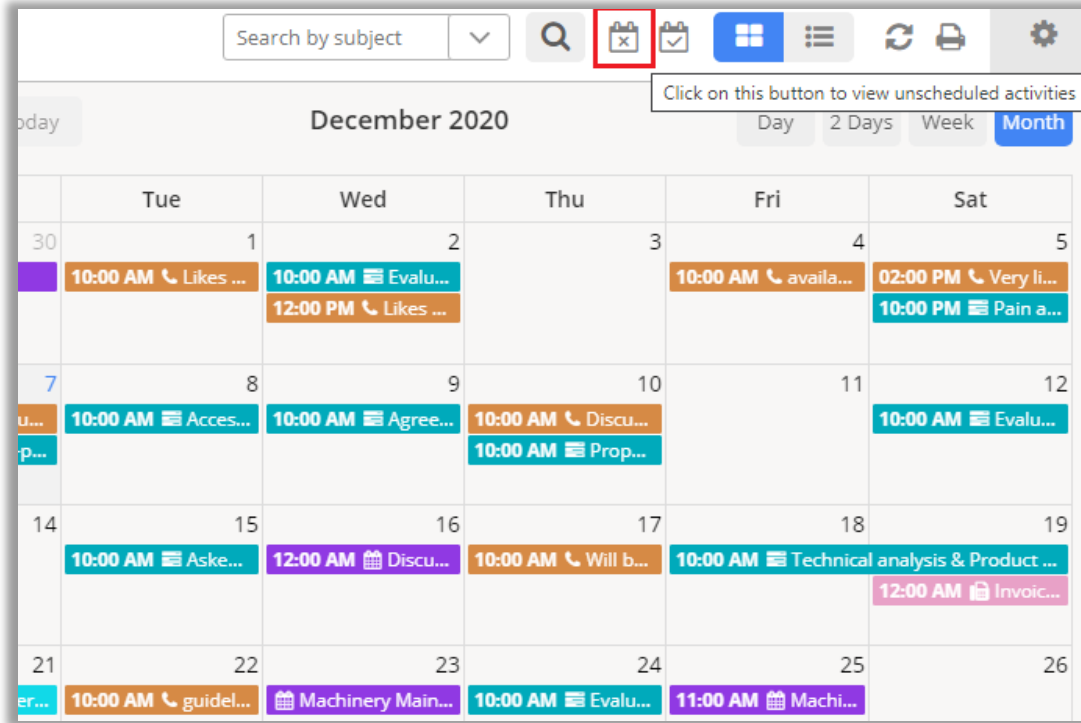
- On clicking **Ignore and Save** button, activity gets saved but with conflicting error message on the activity. Clicking **Cancel** button, scheduling gets cancelled and you again get to re-schedule date and time of the activity.



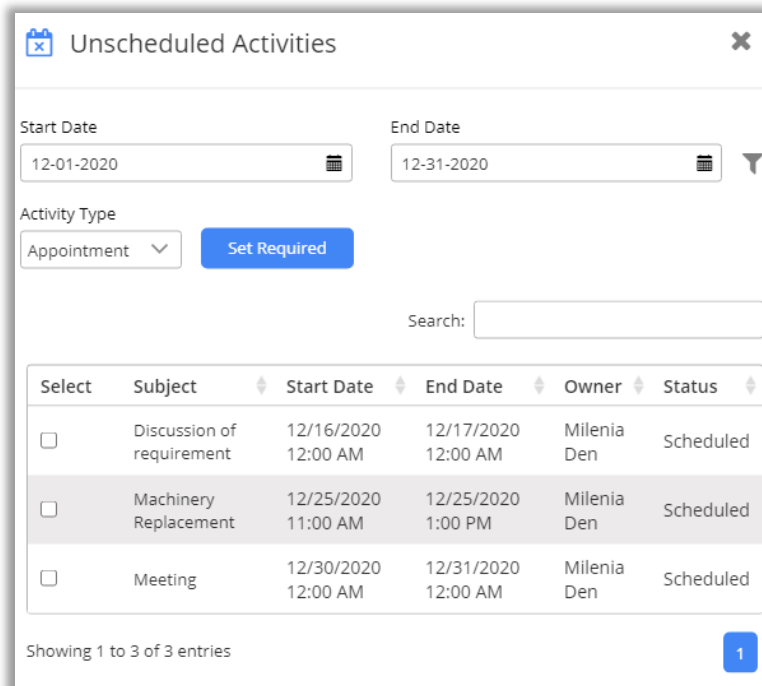
Note: You get scheduling alerts for all the activities except Custom activity. And it works only if conflict management is enabled from configuration page.

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.

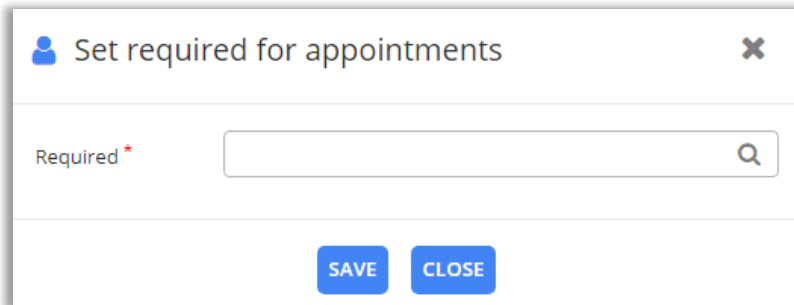


- It opens dialog box with list of Unscheduled Activities.
- This list comprises of two activities based on activity type selected. Start and End date filters to filter activities along with search box to search activities.

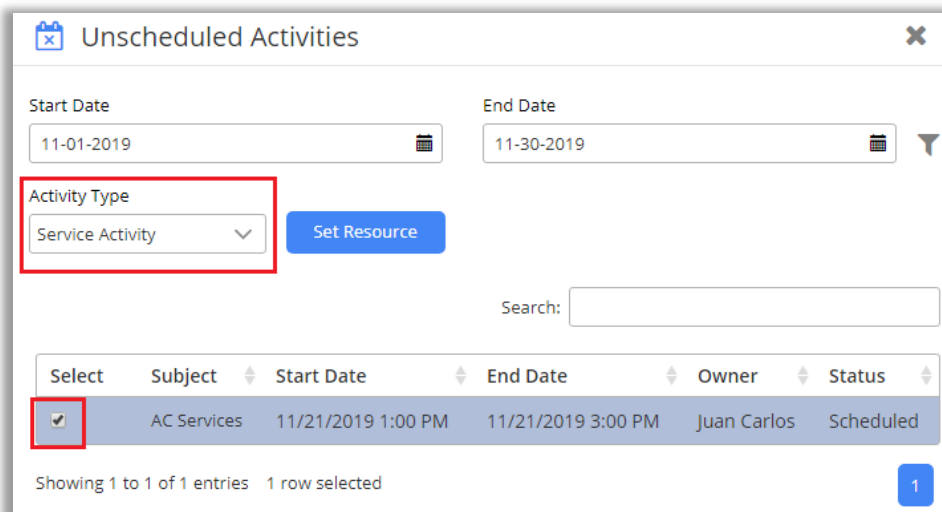


USER MANUAL: Calendar 365- "Calendar View & Functionalities"

- 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.



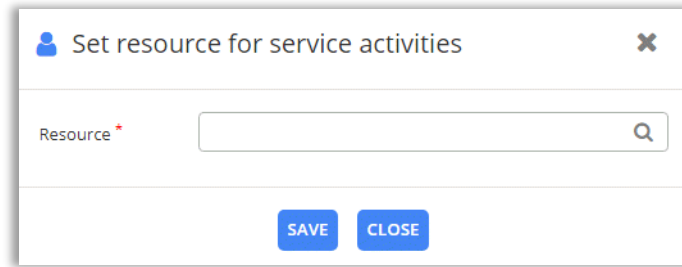
- Upon saving, attendees get assigned and that activity gets removed from the list of unscheduled activities.
- If 'activity type' is **service activity**, it shows all the service activities that don't have resources assigned.
- To assign resources to the service activity, select service activity as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

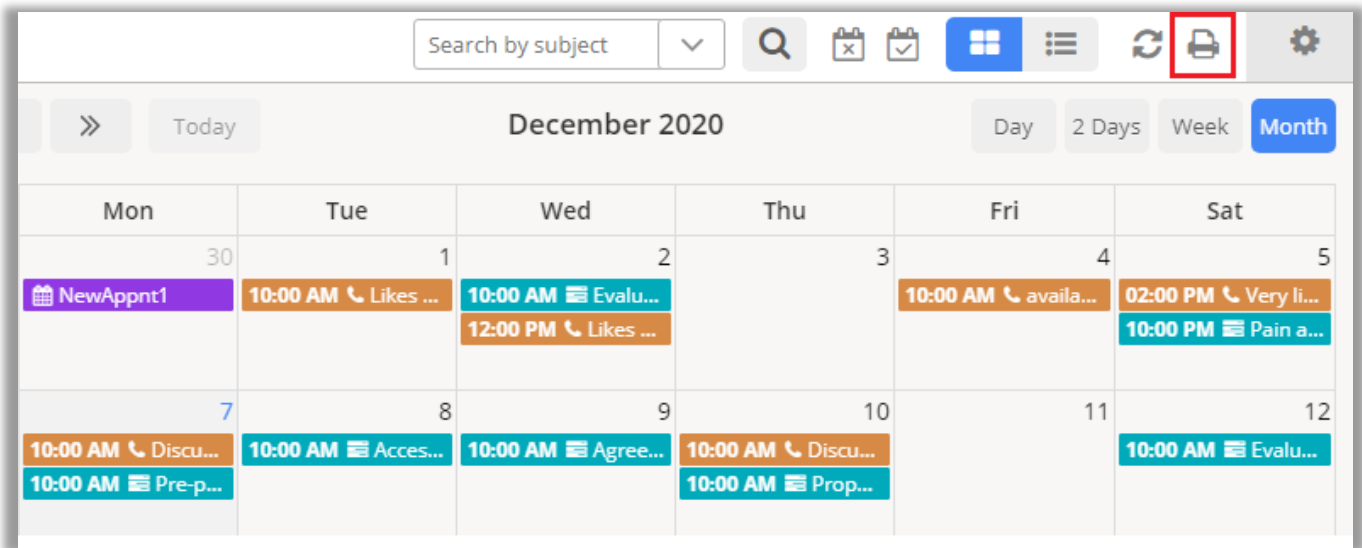
- Clicking on 'Set Resource' button, it will open dialog box to select required resources. Select them as required and click on Save button.

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



Print Calendar

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



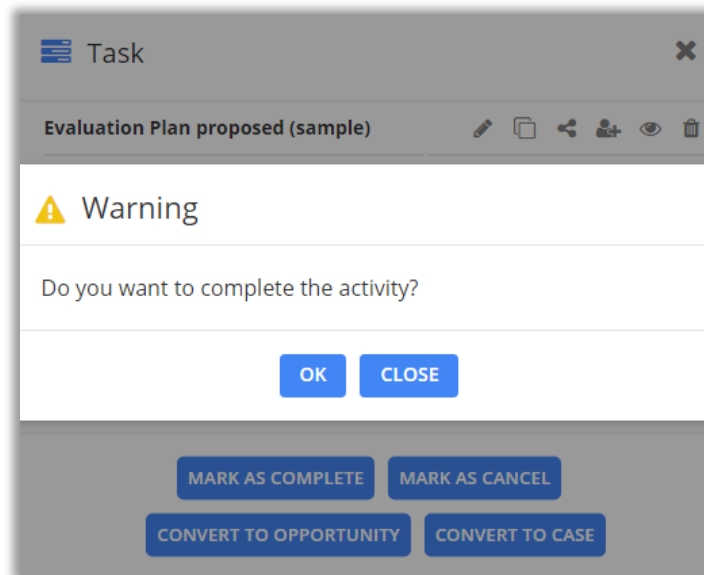
- You can print the calendar in Portrait view as well as Landscape view in different formats like PDF, XPS Document Writer, directly fax it and save to Google Drive.

Activity Action

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

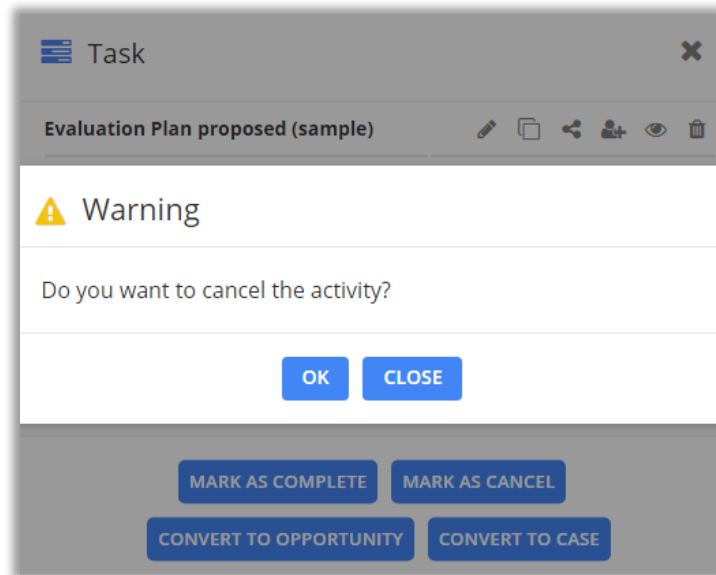
Mark as Complete

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



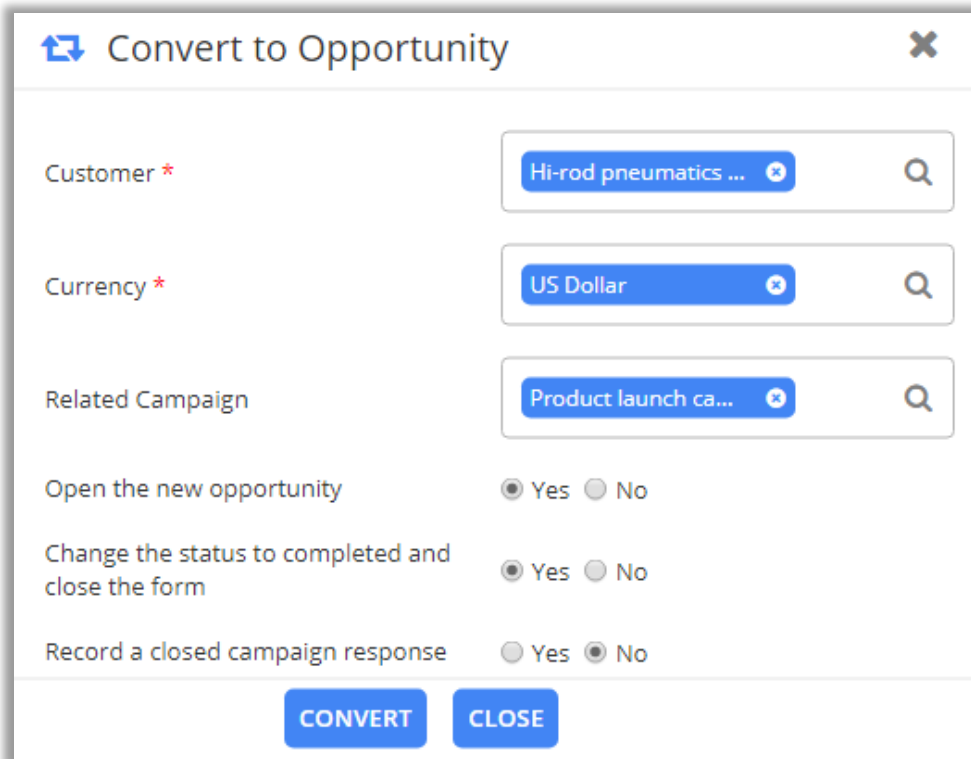
Mark as Cancel

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



Convert Activity to Opportunity

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



Convert Activity to Case

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

Convert to Case

Customer *

Subject

Open the new case Yes No

Change the status to completed and close the form Yes No

CONVERT **CLOSE**

Convert Activity to Lead

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

Convert to Lead

First Name:

Last Name*:

Company:

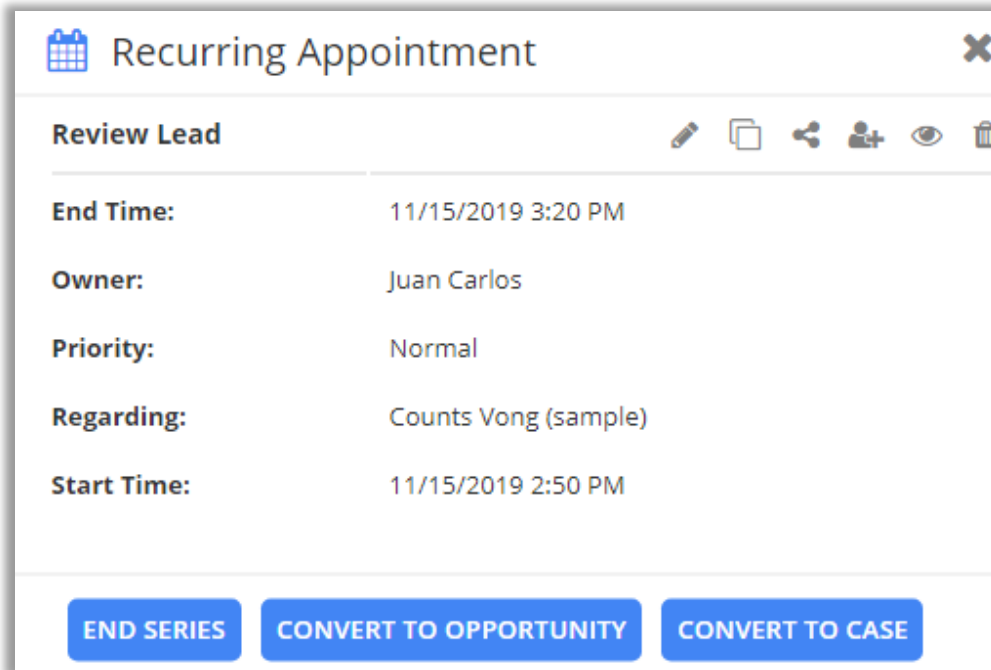
Email Address:

Open the new Lead: Yes No

CONVERT **CLOSE**

End Series

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

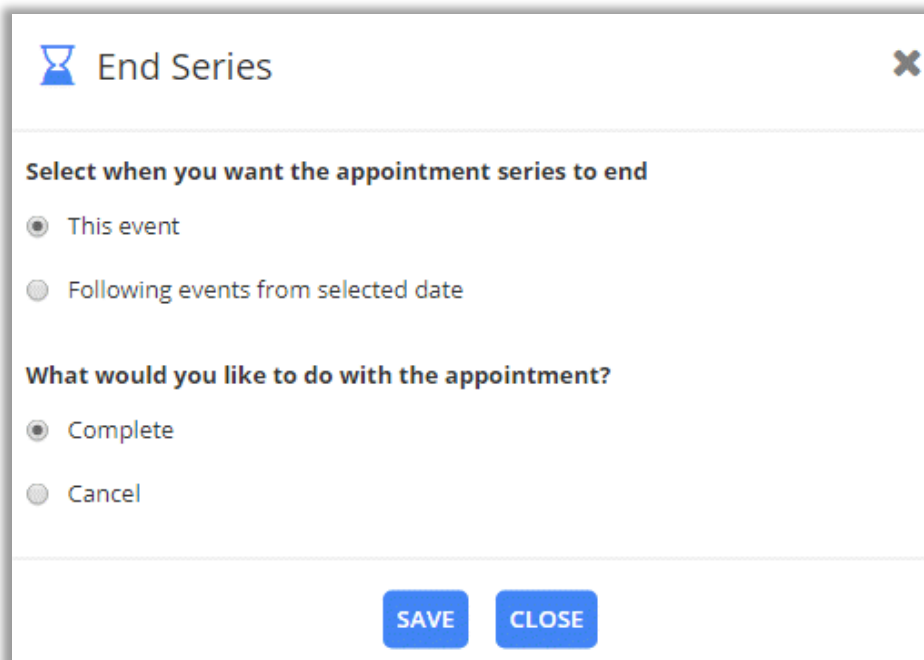


The screenshot shows a window titled "Recurring Appointment" with a close button (X) in the top right corner. Below the title bar, there is a header "Review Lead" with several icons (edit, copy, share, add, view, delete) to its right. The main content area displays the following details:

End Time:	11/15/2019 3:20 PM
Owner:	Juan Carlos
Priority:	Normal
Regarding:	Counts Vong (sample)
Start Time:	11/15/2019 2:50 PM

At the bottom of the window, there 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 screenshot shows a dialog box titled "End Series" with a close button (X) in the top right corner. The dialog contains two sections:

Select when you want the appointment series to end

- This event
- Following events from selected date

What would you like to do with the appointment?

- Complete
- Cancel

At the bottom of the dialog, there 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.

End Series

Select when you want the appointment series to end

This event

Following events from selected date

Selecting this will delete all future appointments in the series

Series End Date

What would you like to do with the past appointments that are open?

Complete

Cancel

SAVE **CLOSE**

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

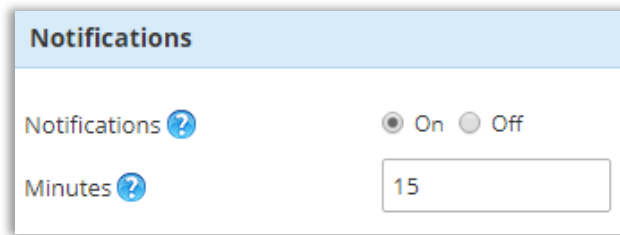
Status Reason: Active

DEACTIVATE

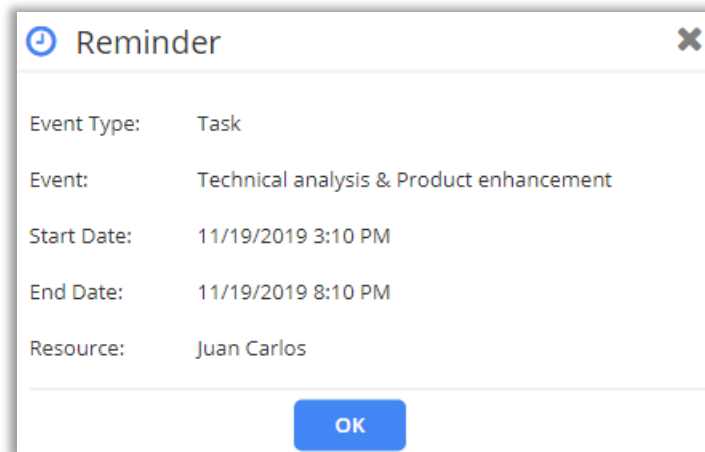
- By clicking on Bookable Resource activity, the details of Bookable Resource will appear.
- You can Deactivate the Bookable Resource Booking by clicking on **Deactivate** button.

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.



The dialog box has a light blue header with the title "Notifications". Below the header, there are two rows of controls. The first row contains the text "Notifications" followed by a help icon (a question mark in a blue circle) and two radio buttons labeled "On" and "Off", with "On" being selected. The second row contains the text "Minutes" followed by a help icon and a text input field containing the number "15".



The dialog box has a white background and a title bar with a clock icon and the text "Reminder" on the left, and a close icon (an 'X') on the right. The main content area contains five rows of text: "Event Type: Task", "Event: Technical analysis & Product enhancement", "Start Date: 11/19/2019 3:10 PM", "End Date: 11/19/2019 8:10 PM", and "Resource: Juan Carlos". At the bottom center of the dialog is a blue button with the text "OK".

Calendar Views

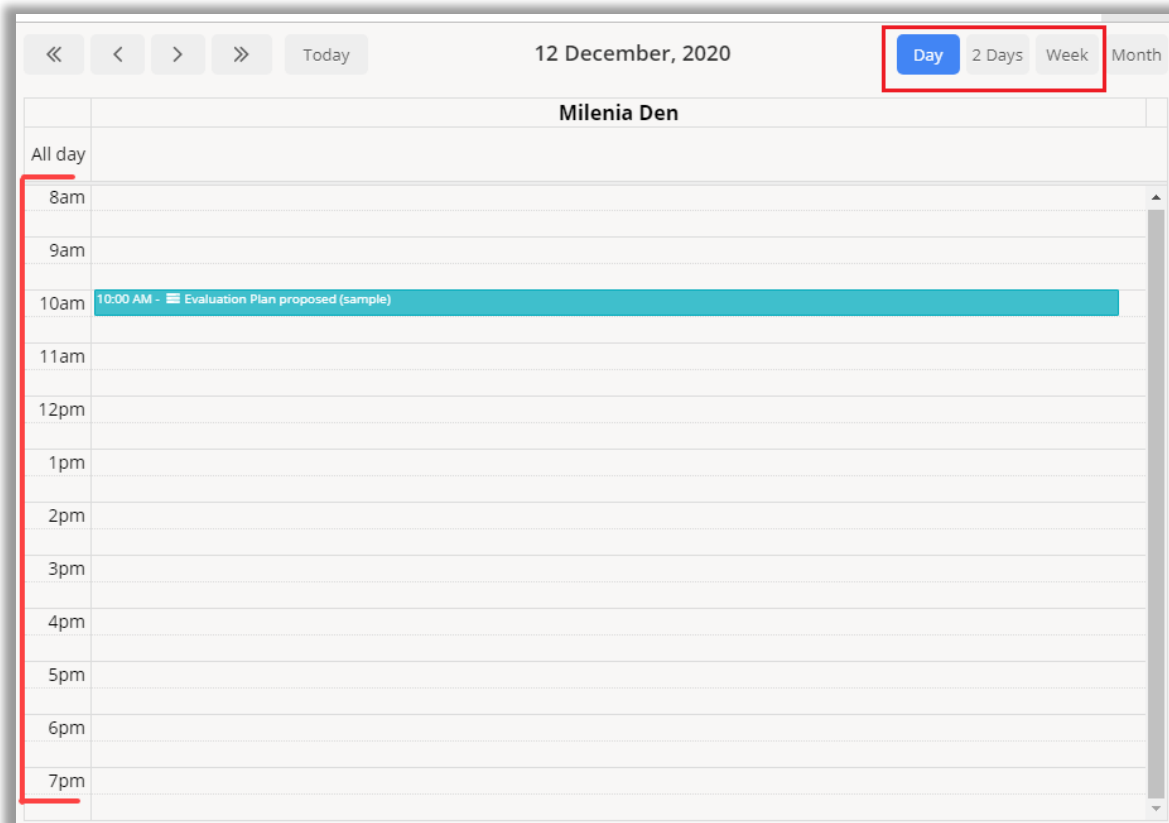
- There are multiple views are given in the Calendar 365 to check the activities and as per the schedule.

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.

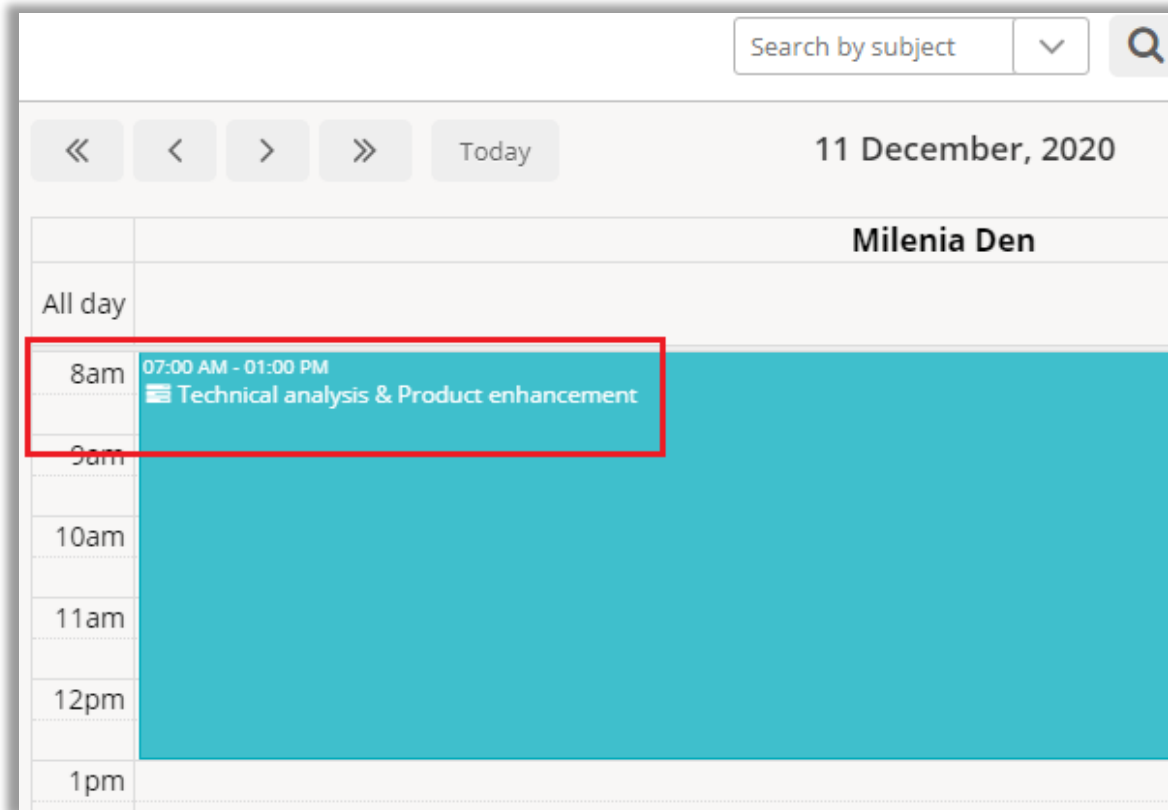
Minimum Duration ?	08	▼
Maximum Duration ?	20	▼

- 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.

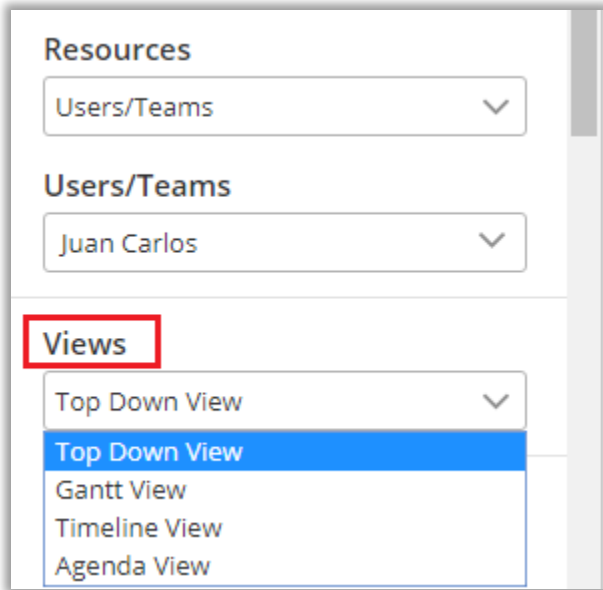


USER MANUAL: Calendar 365- "Calendar View & Functionalities"

- 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

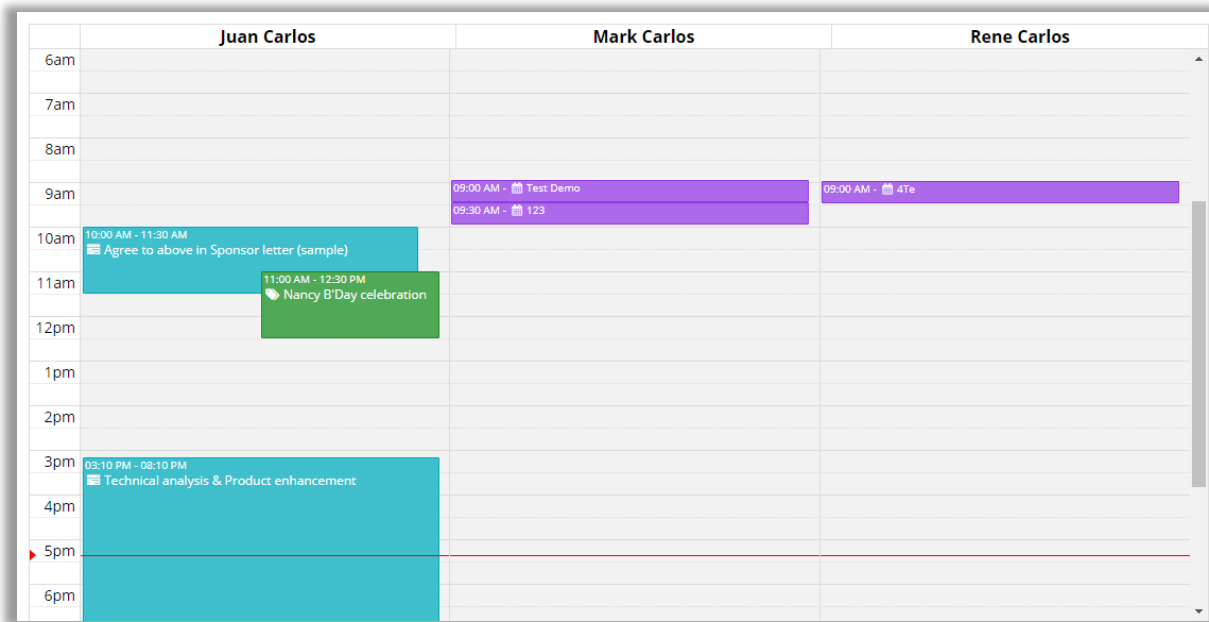
Note: You can check all Calendar Views in Resource Calendar and Customer Calendars individually.

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.

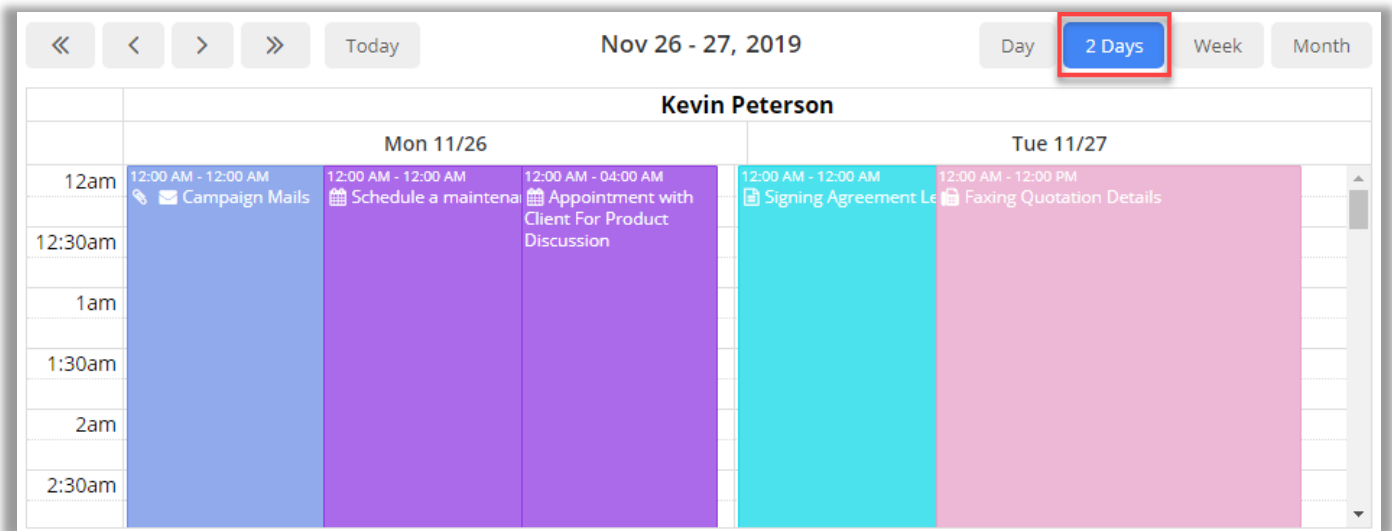
Day View:

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



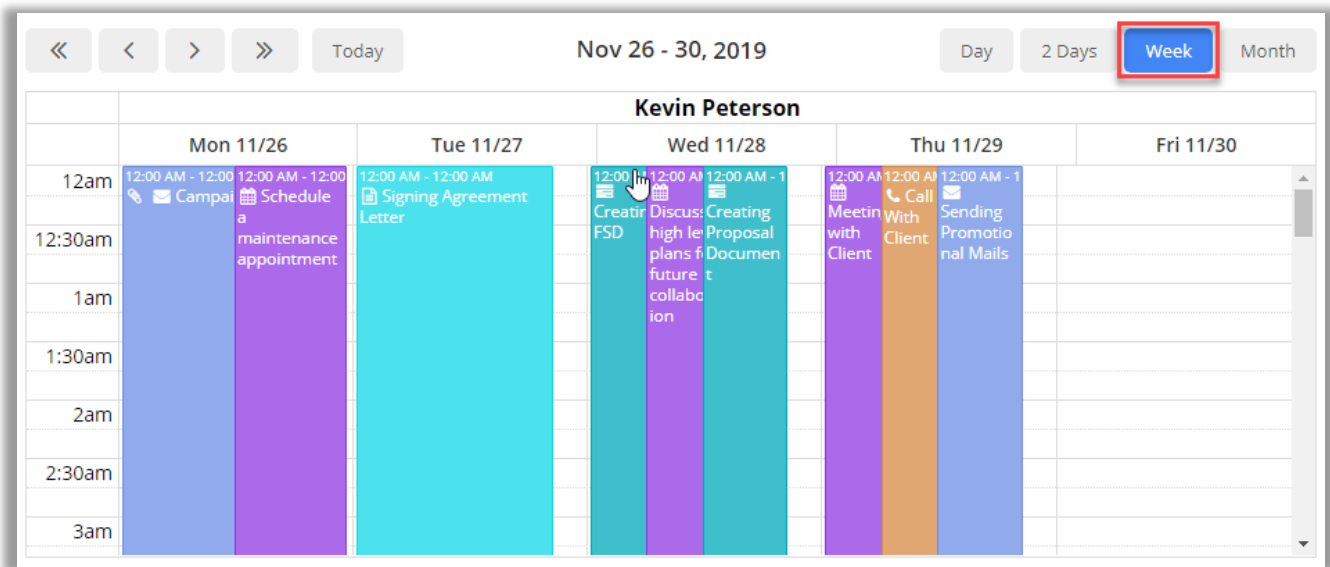
Day Span View:

- 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.



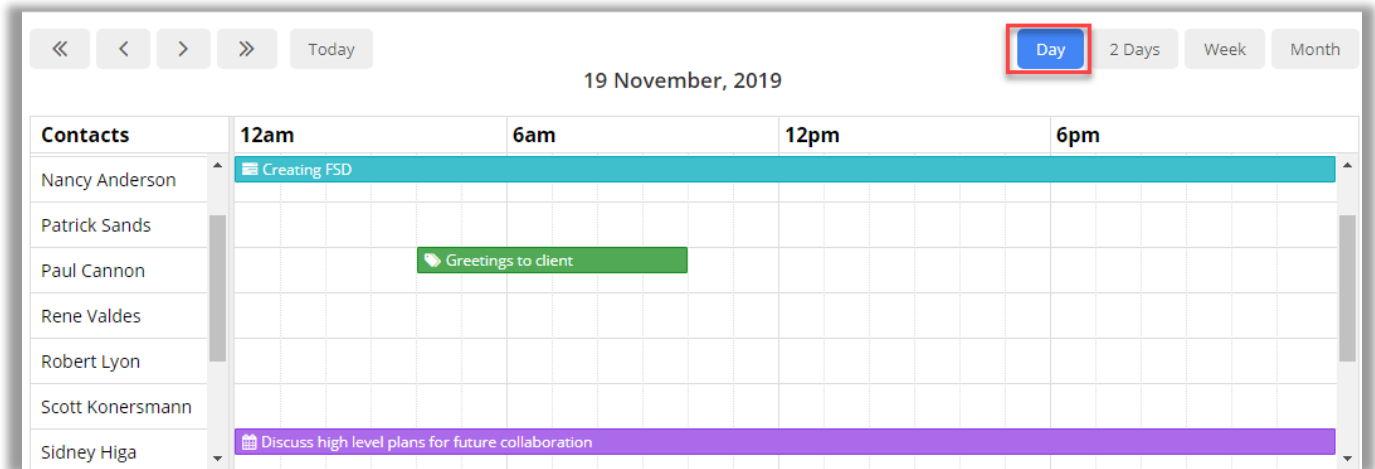
- Similarly, in Month View, you will see the details month wise with the dates.

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**.

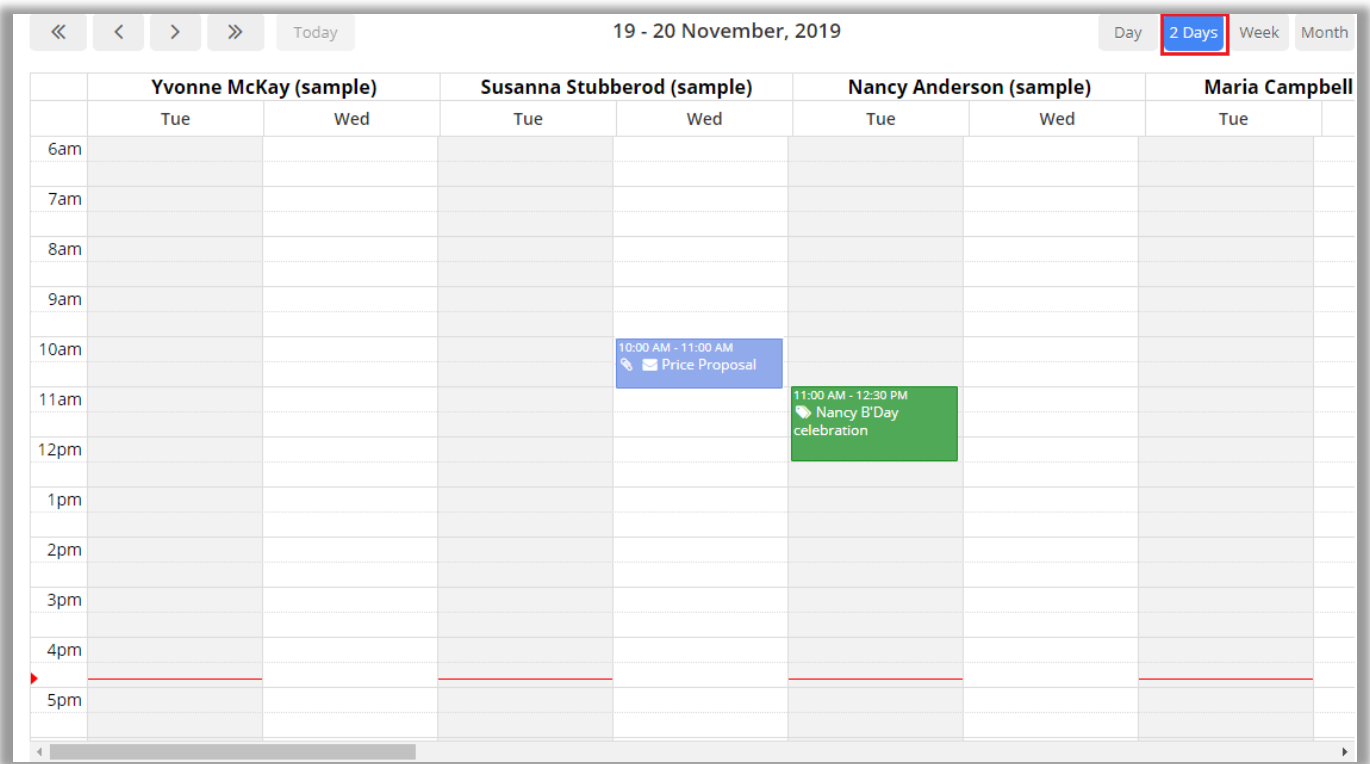
Day View:

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



Day Span View:

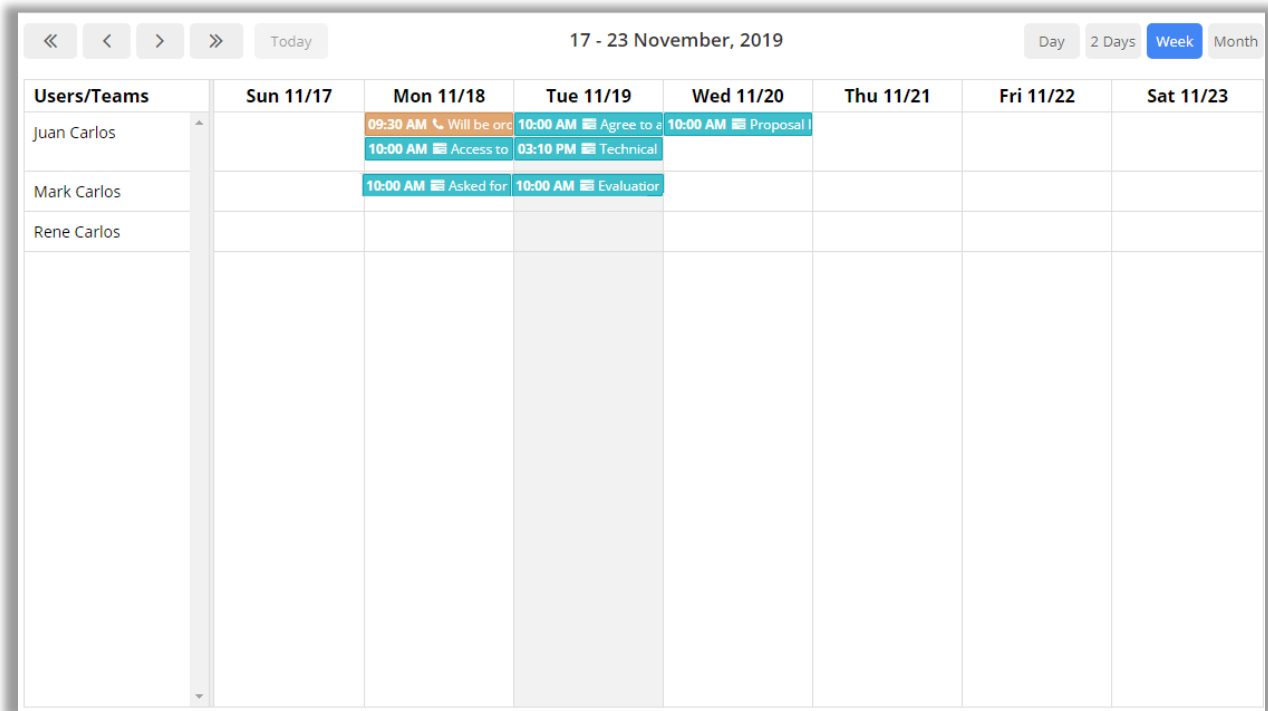
- You can view the calendar as per the configured Number Of Days from default configurations in Gantt View.



USER MANUAL: Calendar 365- "Calendar View & Functionalities"

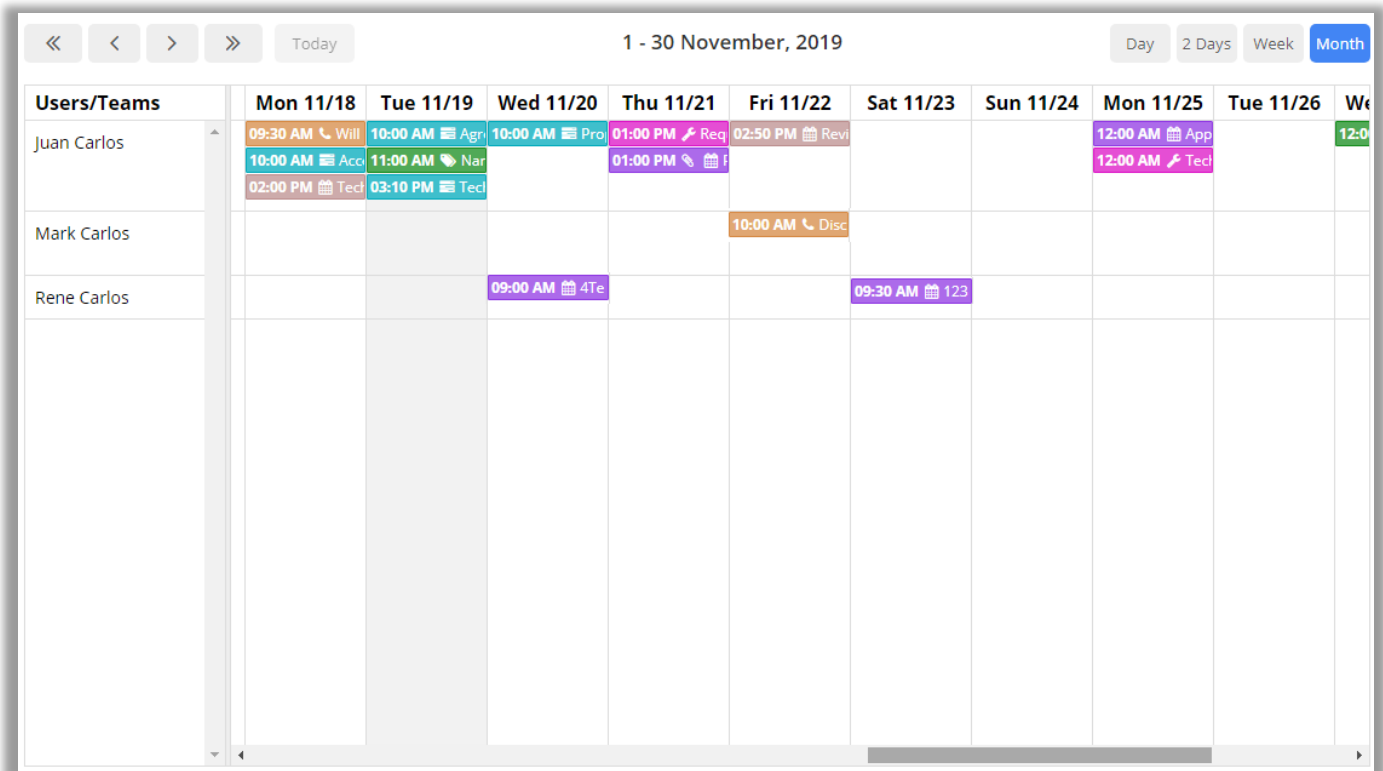
Week View:

- 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.

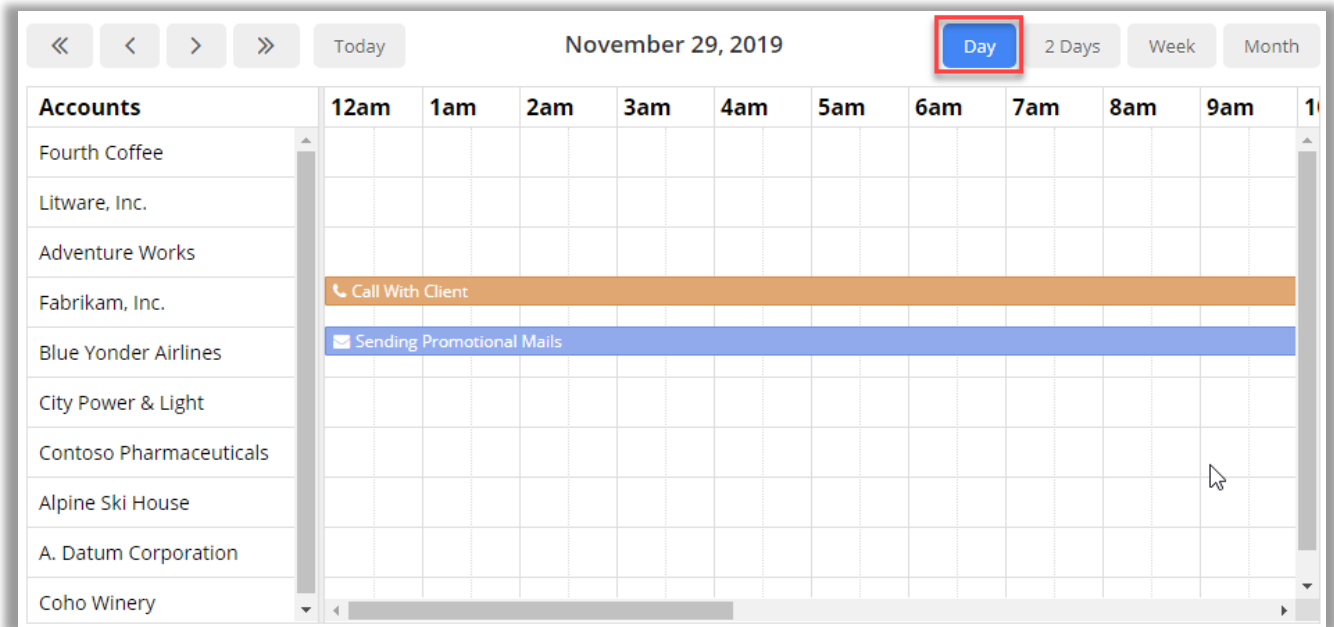


Timeline View

- 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.

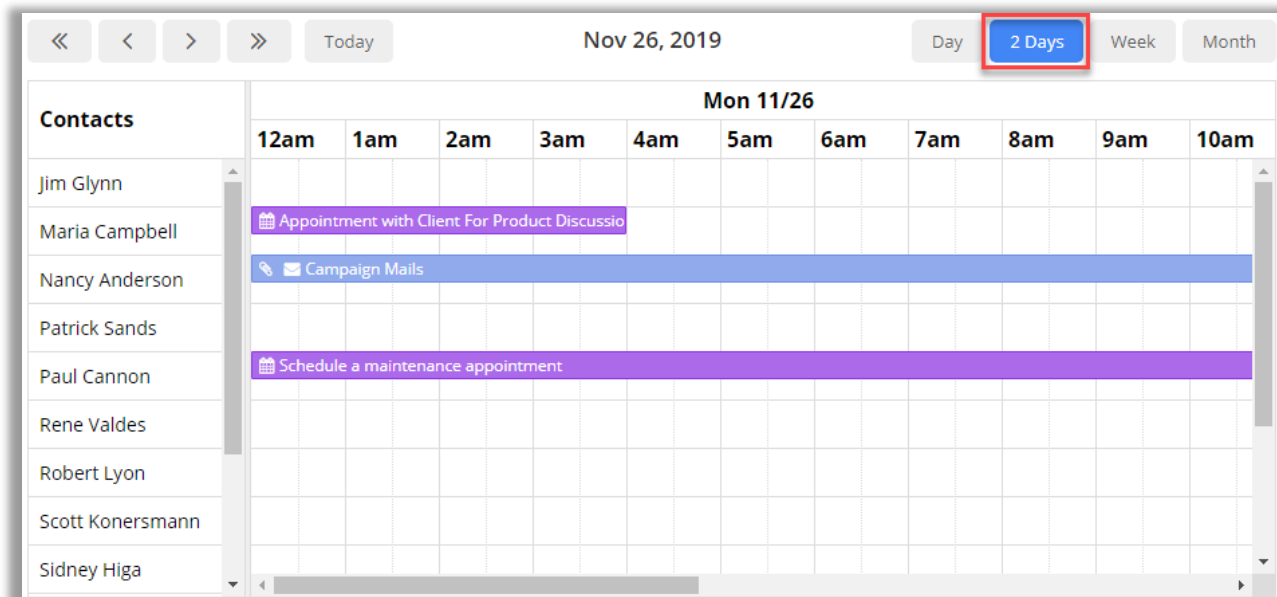
Day View:

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



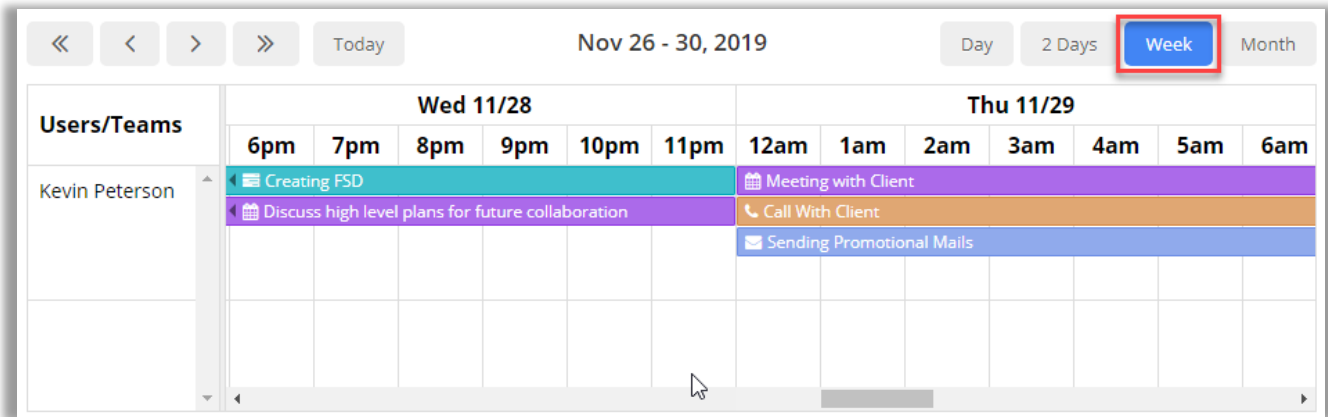
Day Span View

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



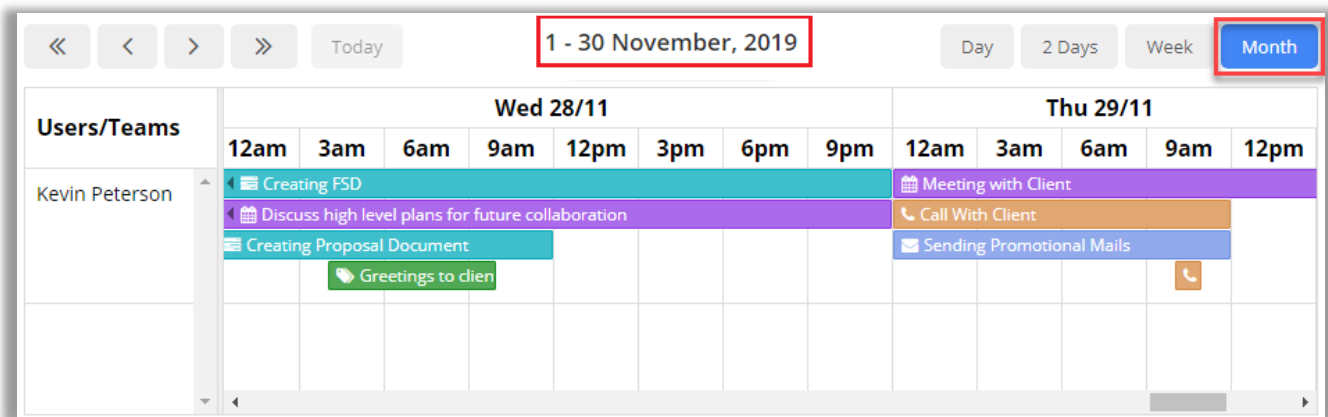
Week View:

- 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.

The screenshot shows the Day View interface for Wednesday, November 28, 2019. At the top, there are navigation arrows and a 'Today' button. The date 'November 28, 2019' is displayed in the center. On the right, there are view selection buttons: 'Day' (highlighted with a red box), '2 Days', 'Week', and 'Month'. Below the header, the day is labeled 'Wednesday'. The main area contains a list of activities with their start and end times and associated resources:

Time	Resource	Activity
12:00am - 12:00am	Nancy Anderson	Creating FSD
12:00am - 12:00am	Sidney Higa	Discuss high level plans for future collaboration
4:00am - 10:00am	Paul Cannon	Greetings to client

Day Span View:

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

The screenshot shows the Day Span View interface for the period from November 15 to 19, 2019. At the top, there are navigation arrows and a 'Today' button. The date range '15 - 19 November, 2019' is displayed in the center. On the right, there are view selection buttons: 'Day', '5 Days' (highlighted with a red box), 'Week', and 'Month'. Below the header, the days are grouped by date:

Date	Time	Resource	Activity
November 15, 2019	2:00pm - 2:30pm	Juan Carlos	Sponsor has a buying vision (sample)
November 18, 2019	9:00am - 9:30am	Mark Carlos	Test Demo
	9:00am - 9:30am	Rene Carlos	4Te
	9:30am - 10:00am	Mark Carlos	123
	2:50pm - 3:20pm	Juan Carlos	Review Lead
November 19, 2019	10:00am - 10:30am	Juan Carlos	Discuss new opportunity (sample)
	2:00pm - 4:00pm	Juan Carlos	Tech Review

Week View:

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

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			

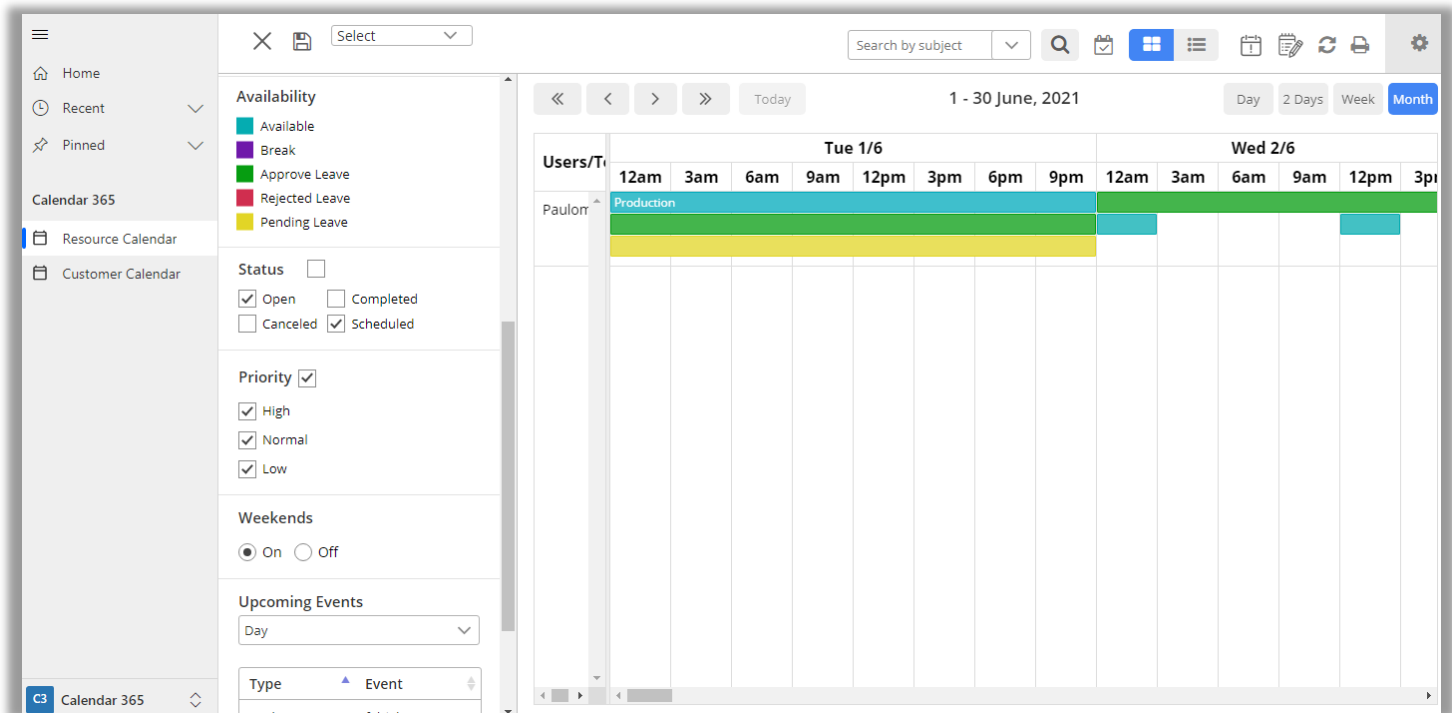
Month View:

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

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.



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Tickets

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- 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