

USER MANUAL



Calendar 365: “Installation & Configuration”

Version: 6.0

Compatibility:

Microsoft Dynamics 365 (Online and On-premise)

Browser Compatibility:

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

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Introduction

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

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

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

Pre-requisites

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

New changes

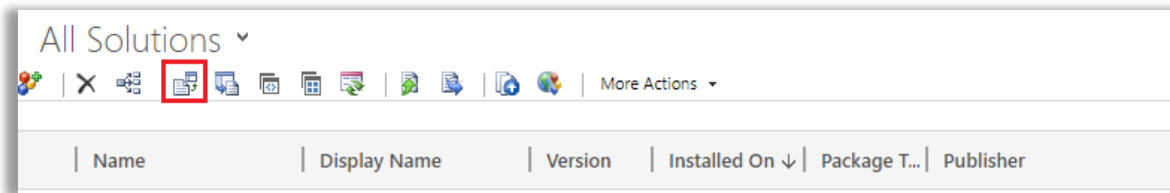
As per the latest version of **Calendar 365**, the following topics are updated or newly added:

- 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

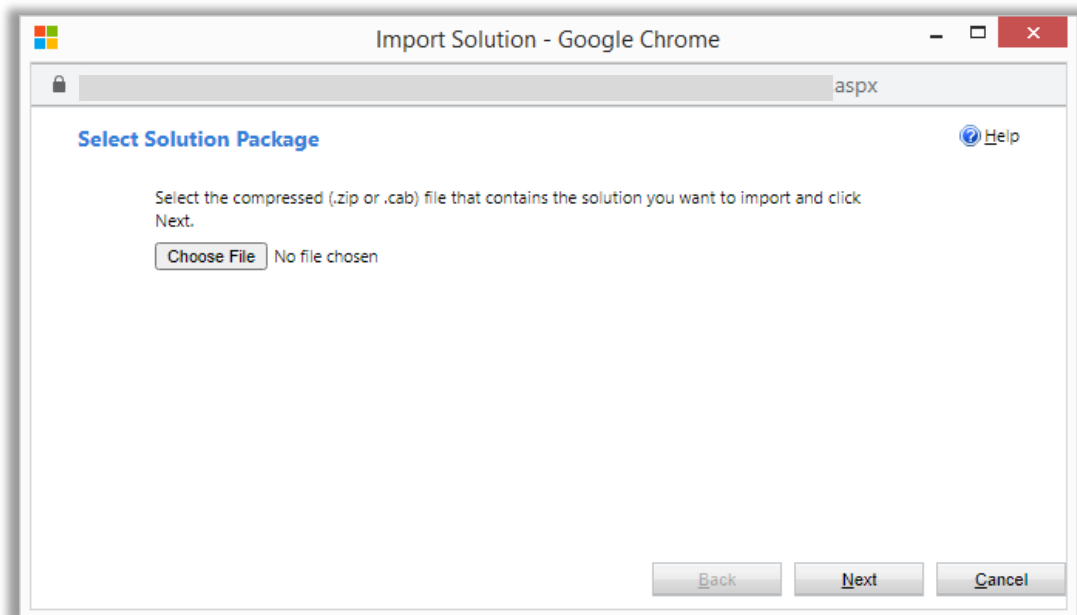
Installation

Installation Steps

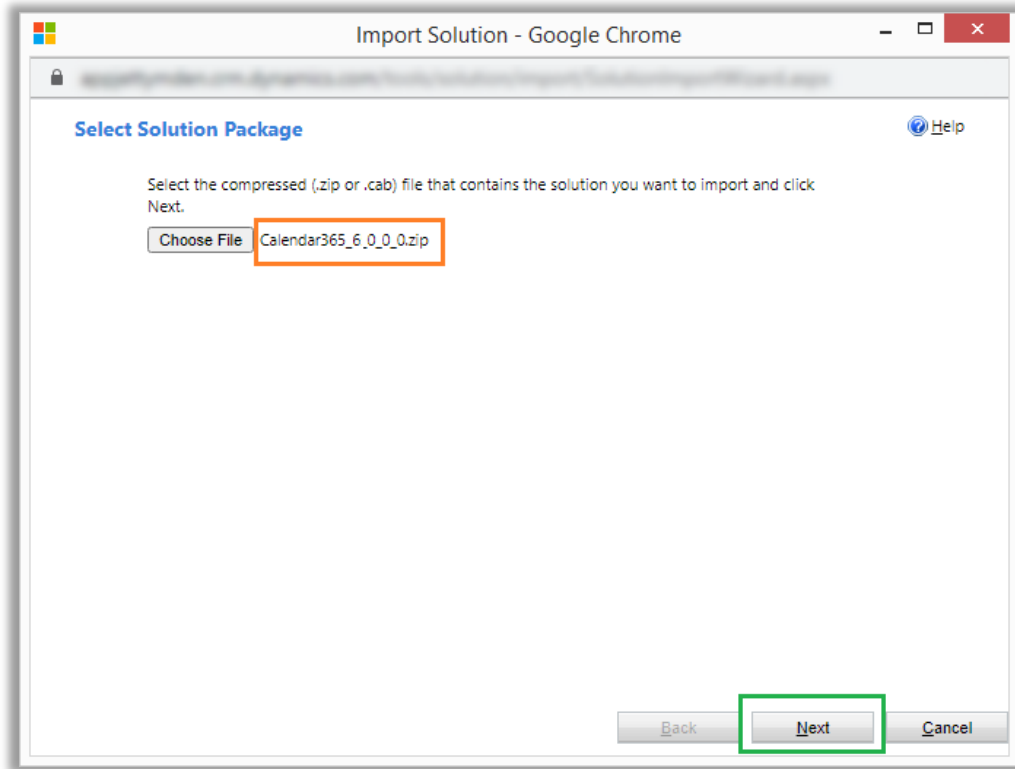
- To install the “Calendar 365” plugin, the following steps are to be followed
 - On purchasing the plugin, you will get a zip file named **Calendar365_v6.0.zip**
 - Login into your CRM Account and click on **Settings → Solutions**.
 - Click on **‘Import’** to upload and install the Solution.



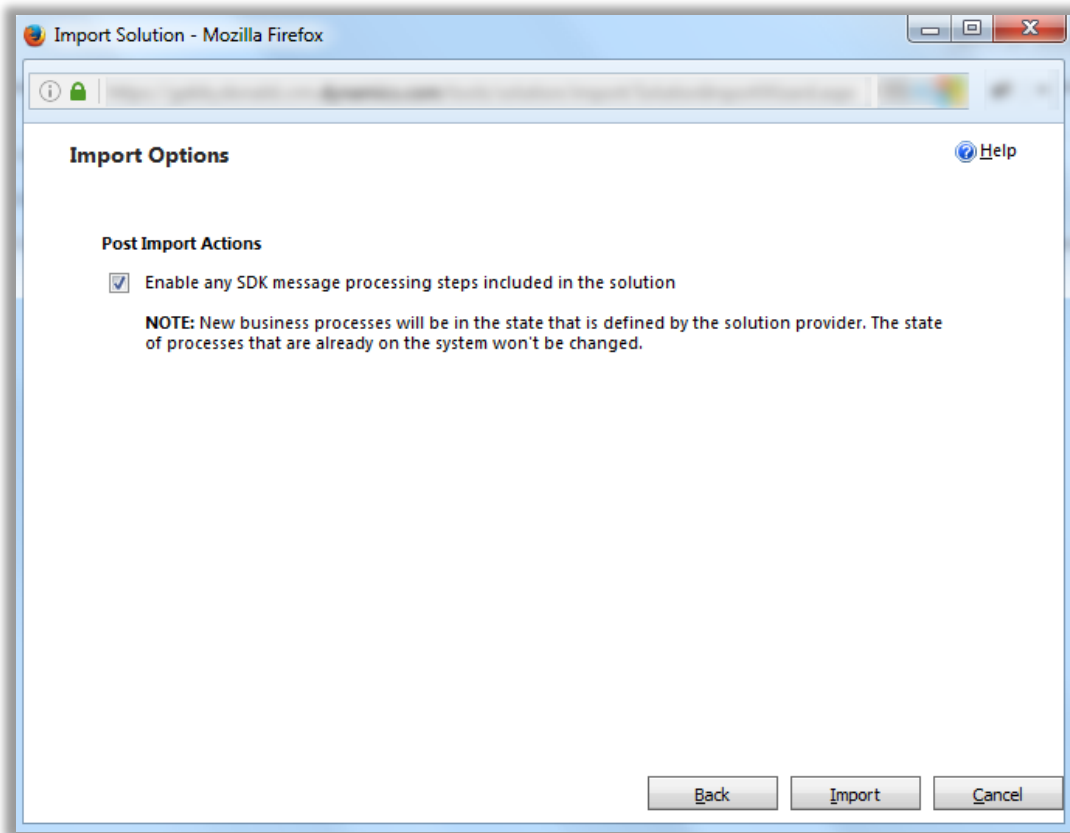
- Click on **Choose File** button and choose the Package Zip File for Calendar 365 from the “Import Solution” Window.



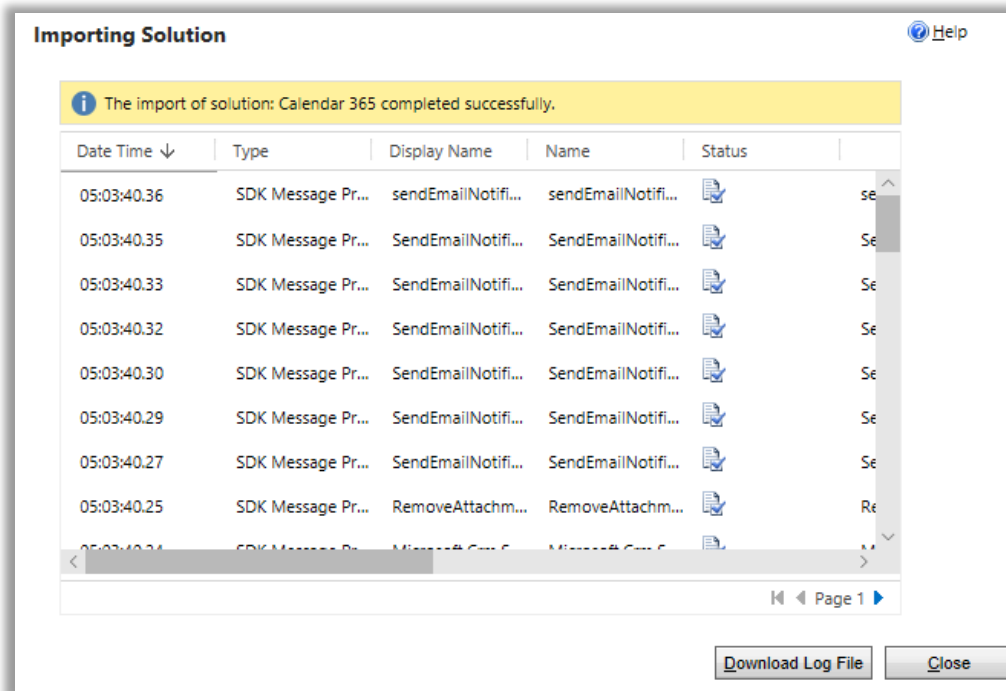
- After selecting the Zip file, click on **Next** for further processing.



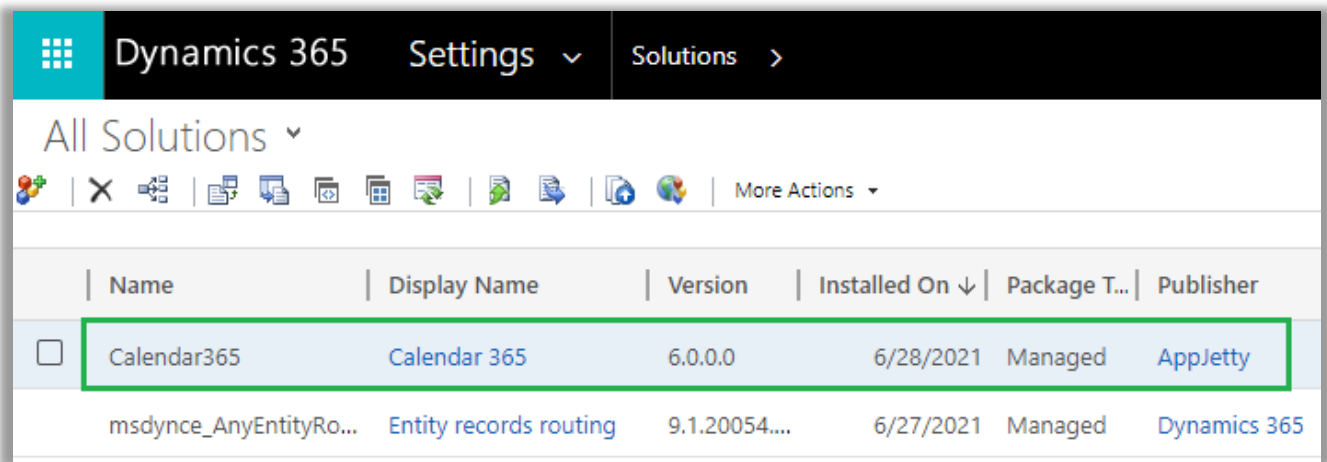
- Check the box to enable any SDK message processing steps included in the solution and click on 'Import' button to Import the Solution.



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



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

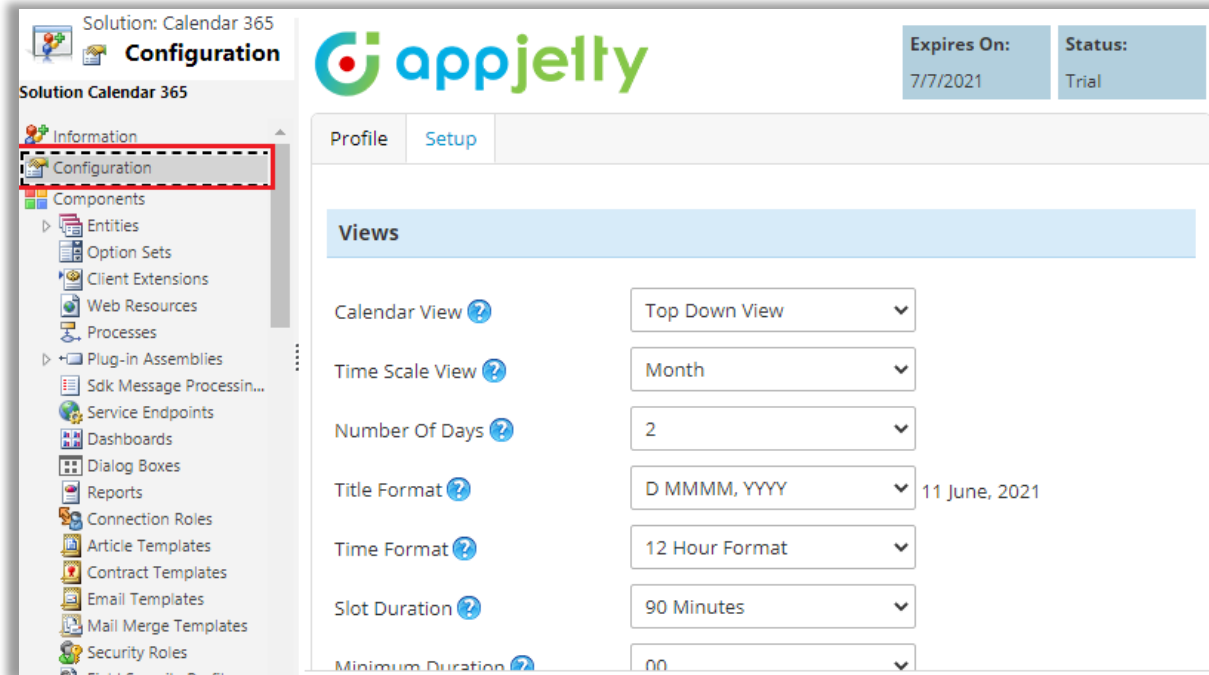


The screenshot shows the Dynamics 365 interface. At the top, there is a navigation bar with the Dynamics 365 logo, 'Settings' with a dropdown arrow, and 'Solutions' with a right-pointing arrow. Below this is a section titled 'All Solutions' with a dropdown arrow. A toolbar contains various icons for actions like adding, deleting, and refreshing, followed by a 'More Actions' dropdown. The main content is a table listing installed solutions.

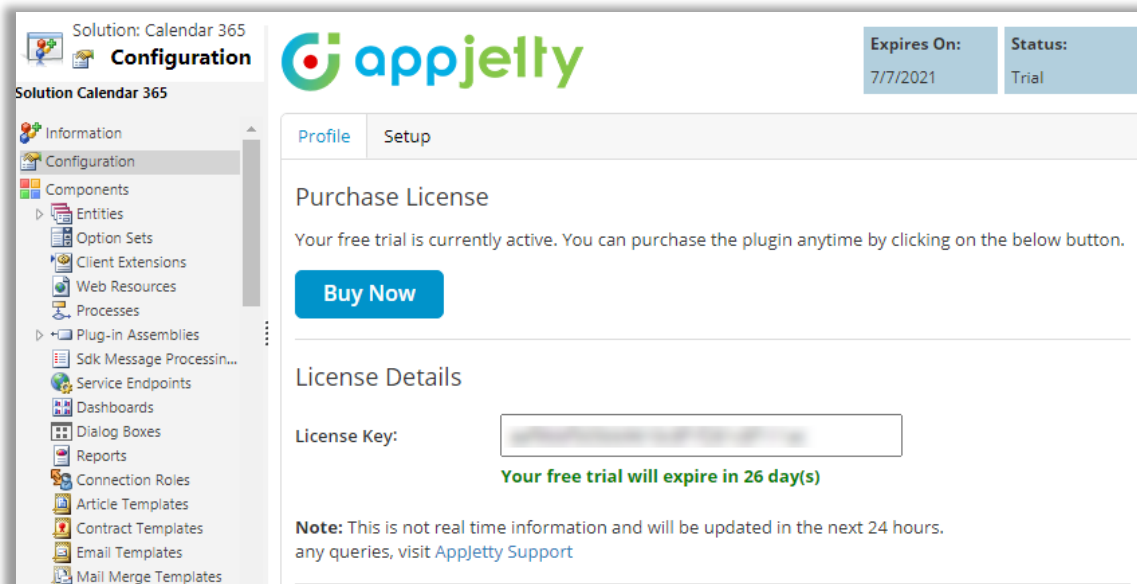
	Name	Display Name	Version	Installed On ↓	Package T...	Publisher
<input type="checkbox"/>	Calendar365	Calendar 365	6.0.0.0	6/28/2021	Managed	AppJetty
	msdynce_AnyEntityRo...	Entity records routing	9.1.20054...	6/27/2021	Managed	Dynamics 365

Free Trial and Activation

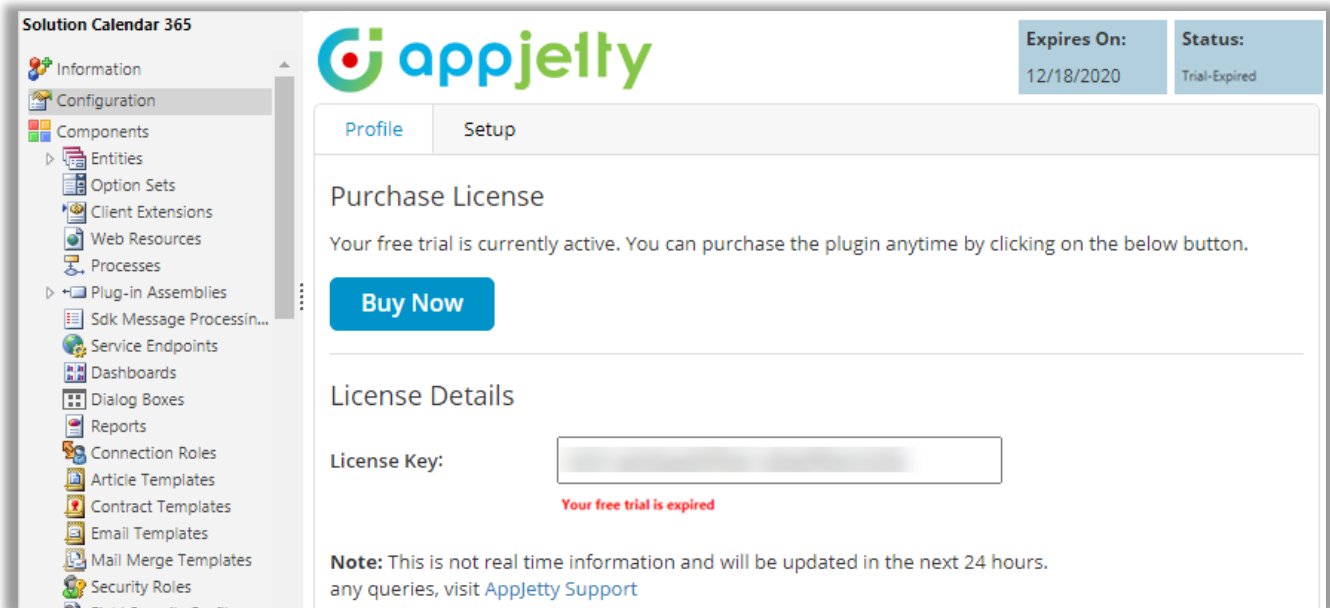
- Click on 'Calendar 365' display name to configure the plugin with your license key.
- This will open a new window. Click on 'Configuration' from the options provided on the left side panel of the page.



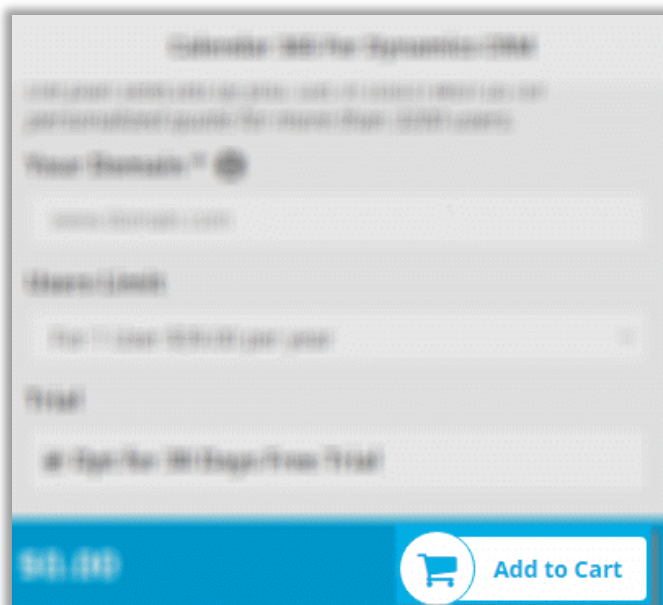
- You can purchase the licensed version any time. To purchase the license, click on 'Buy Now' button.
- Your trial will activate, and expiry date will be displayed on top.



- You can activate your one-month free trial. To get a one-month free trial license key fill out the details and click on 'ACTIVATE' button.



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



- On successfully completing the purchase process, you will receive your license key via email along with steps to complete the license configuration.
- Click on 'Activate' button to activate your license. After submitting the valid license key, you will be navigated to the Setup tab.

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

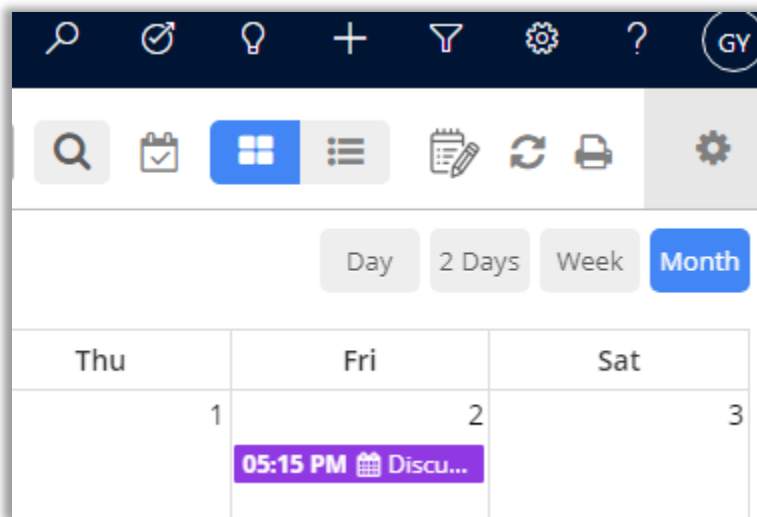
The screenshot displays the 'Setup' tab of the Calendar 365 configuration interface. It is divided into two main sections: 'License Details' and 'Manage Users'.

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

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

Calendar 365 Default Configuration

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



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

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

Views Configuration

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

Profile	Setup	Entity calendar
Views		
Calendar View ?		Top Down View
Time Scale View ?		Month
Number Of Days ?		2
Title Format ?		D MMMM, YYYY 7 July, 2021
Time Format ?		12 Hour Format
Slot Duration ?		90 Minutes
Minimum Duration ?		00
Maximum Duration ?		24
Default Regarding ?		Contact
Shared Calendar ?		Yes
Overdue Activities ?		No
Contact Calendar ?		None selected
Account Calendar ?		None selected
Default Weekend ?		On
Activities		

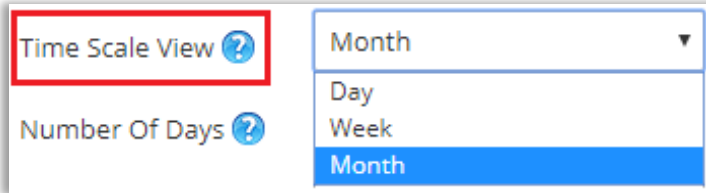
Calendar View:

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

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

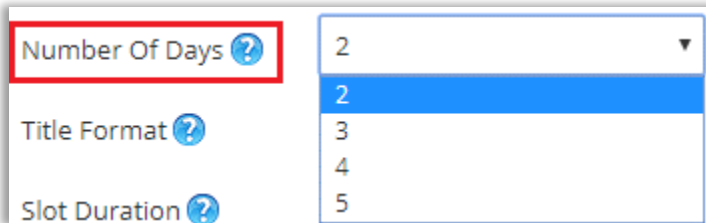
- > Gantt View
- > Top Down View
- > Timeline View
- > Agenda View

▪ **Time Scale View:**



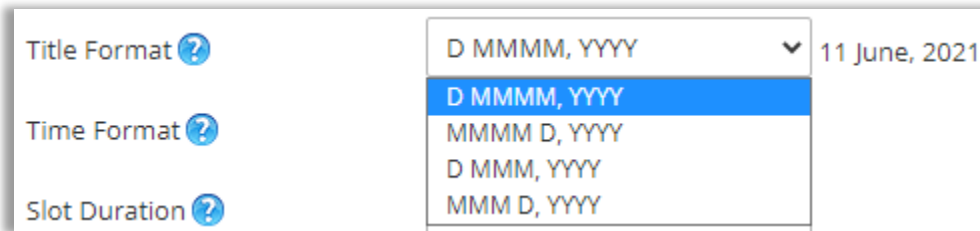
- You can set the default Time Scale View of the calendar from the following:
> Day > Week > Month

▪ **Number of Days:**

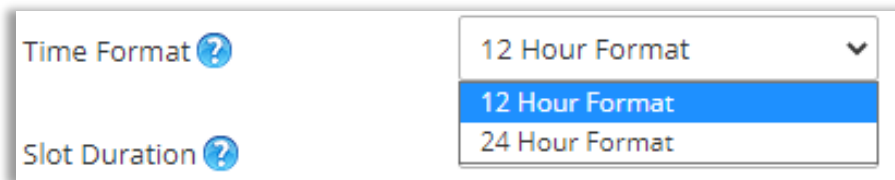


- Select the number of days in which you would like to view the calendar from the Day Span View.

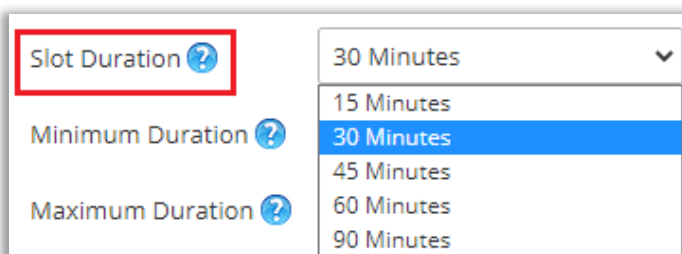
- **Title Format:** Select the format to display on Calendar. The format that you select here will be displayed when you select Day, Day Span and Week view for Calendar.



- **Time Format:** Select the time format to display on Calendar. Select **12-Hour Format** or **24-Hour Format**.



▪ **Slot Duration:**



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

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

Minimum Duration ?	00	▼
Maximum Duration ?	24	▼

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

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

Default Regarding ?	Contact
Shared Calendar ?	Contact
Overdue Activities ?	Contract
Contact Calendar ?	Customer Asset
Account Calendar ?	Entitlement
	Entitlement Template
	Field Service Setting
	Fulfillment Preference
	Incident Type Characteristic
	Incident Type Product
	Incident Type Service

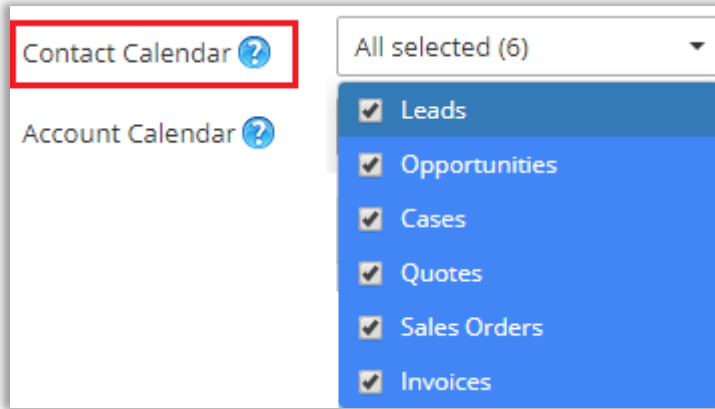
- **Shared Calendar:** If you want to share calendar to another Admin User, select 'Yes'.

Shared Calendar ?	Yes
Overdue Activities ?	Yes
	No

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

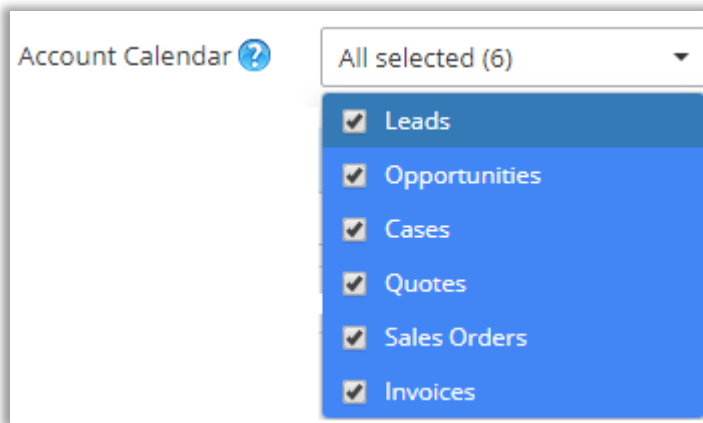
Overdue Activities ?	Yes
Contact Calendar ?	Yes
	No

▪ **Contact Calendar:**



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

▪ **Account Calendar:**



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

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

▪ **Default Weekend:** You will get the Default options for the weekend in the calendar.



Activities

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

Activities

Task Fax Phone Call Email Letter Appointment Recurring Appointment

Service Activity Campaign Activity Bookable Resource Booking Custom Activity

Task

Default Color

Overwrite Color By

Completed

Canceled

Tooltip Attribute

Details Attribute

Title Attribute

Start Date

End Date

Email Reminder On Off

Minutes

Buttons Configuration Convert To Opportunity Convert To Case
 Mark As Complete Mark As Cancel

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

The screenshot shows the 'Overwrite Color By' dialog box with the dropdown menu set to 'By Status'. There are three rows, each with a checked checkbox, a status name, a color code input field, and a color swatch:

Status	Color Code	Color Swatch
<input checked="" type="checkbox"/> Open	#0cbd2a	Green
<input checked="" type="checkbox"/> Completed	#e30d8b	Pink
<input checked="" type="checkbox"/> Canceled	#e83a00	Orange

Note: For **Appointment**, **Recurring Appointment** and **Service Activity**, you will get the option to select the color for "Scheduled" status.

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

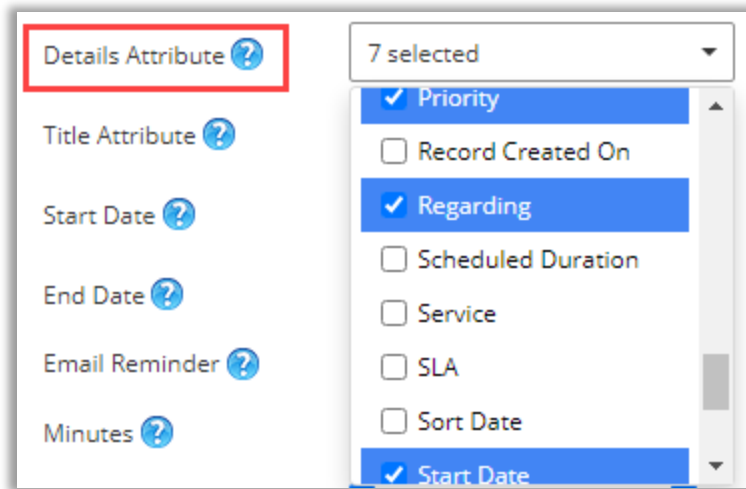
The screenshot shows the 'Overwrite Color By' dialog box with the dropdown menu set to 'By Priority'. There are three rows, each with a checked checkbox, a priority name, a color code input field, and a color swatch:

Priority	Color Code	Color Swatch
<input checked="" type="checkbox"/> High	#ff002b	Red
<input checked="" type="checkbox"/> Normal	#44ab43	Green
<input checked="" type="checkbox"/> Low	#e8e213	Yellow

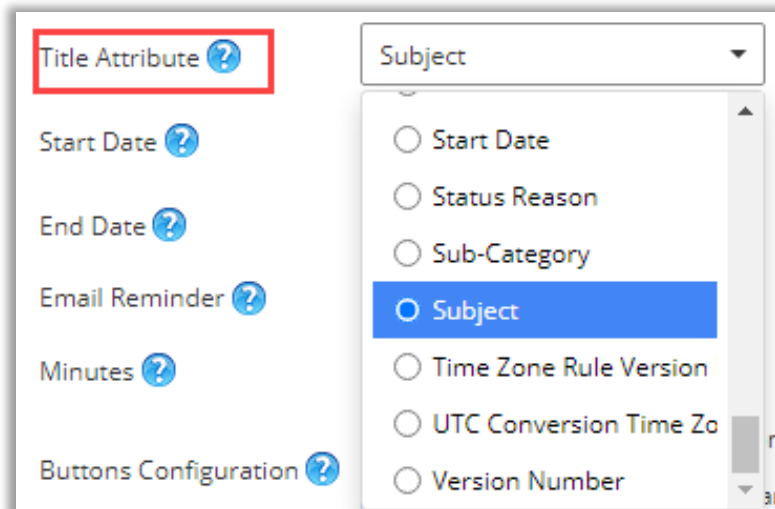
- **Tooltip Attribute:** You can select the **tooltip attributes** from the list of different attributes to be included in activity tooltip that appears on **hovering** the activity in the calendar.

The screenshot shows the 'Tooltip Attribute' selection dialog box. On the left, there is a list of attributes with question marks: 'Tooltip Attribute', 'Details Attribute', 'Title Attribute', 'Start Date', 'End Date', and 'Email Reminder'. The 'Tooltip Attribute' label is highlighted with a red box. On the right, there is a list of 5 selected attributes: 'Owner', 'Owning Business Unit', 'Owning Team', 'Owning User', 'Percent Complete', 'Priority', 'Record Created On', and 'Regarding'. The 'Owner', 'Priority', and 'Regarding' attributes are checked and highlighted in blue.

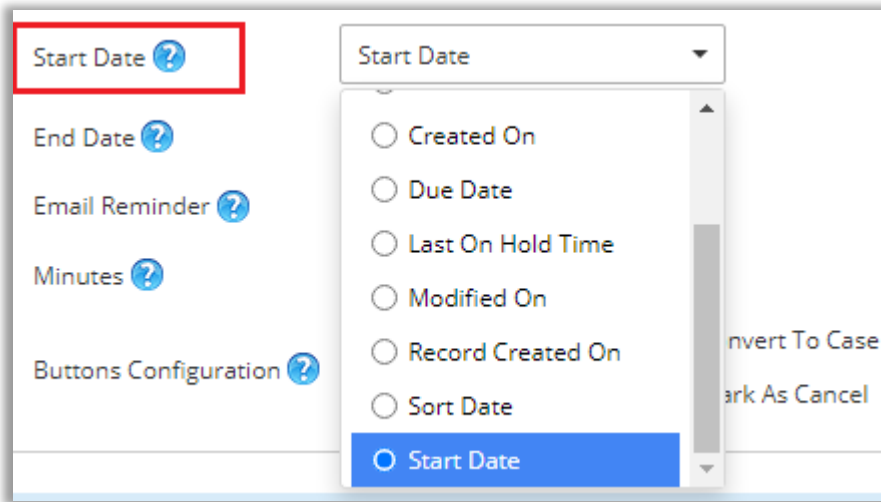
- **Details Attribute:** You can select the **details attributes** to be included in activity detail that appears **on clicking** the activity in the calendar, from the list of different attributes available.
- For both the list, you can select maximum **10 attributes** and **minimum one** attribute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



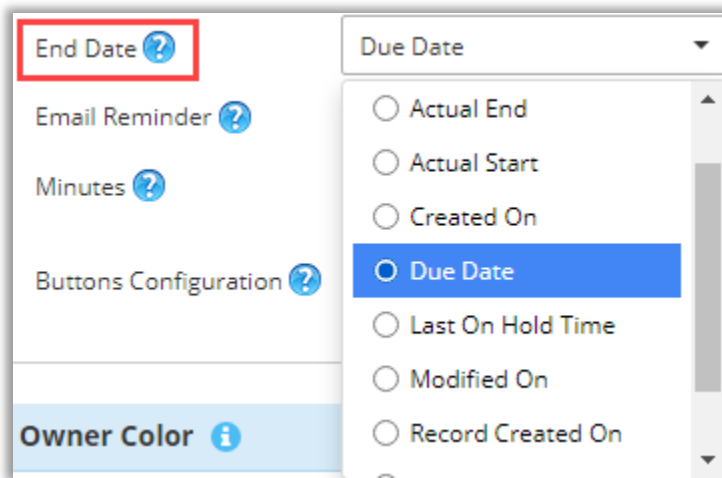
- Check the boxes besides attributes that you wish to include.
- **Title Attribute:** You can select the **title attribute** to be displayed as the **title** of activity in calendar. The 'Title Attribute' comes with default selection of **Subject** attribute. You can select only one attribute from the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



- **Start Date:** View the activities on the calendar based on the selection of its action. Select the action for the Start Date.



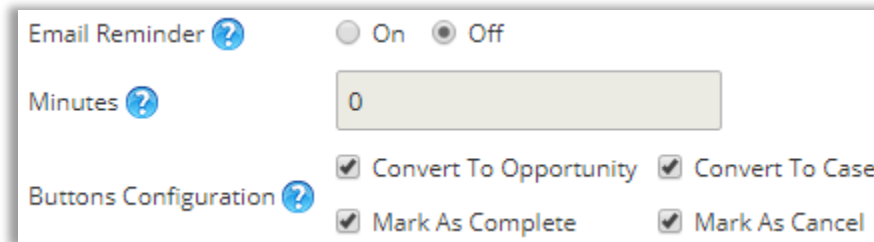
- **End Date:** View the activities on the calendar based on the selection of its action. Select the action for the End Date.



Note: For the **Recurring Appointment** activity, you will not get the Start Date and End Date selection.

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

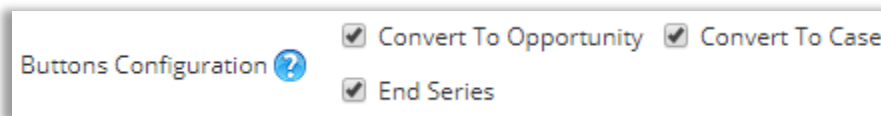
Note: Once you have enabled the 'Email Reminder', you will receive a reminder email for the activity. User who has created the activity will receive the mail on the email address configured during account creation.



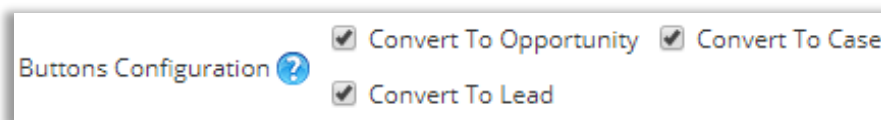
- **Minutes:** Enter the number of minutes before which you want to send the reminder for the activity through email to the users included for the specific activity.
- **Buttons Configuration:** Select the action buttons that you need to include in the calendar. These action buttons are the ones which if enabled lets you perform those actions directly from the calendar. Here activities like Task, Fax, Phone Call, Letter, Appointment, Service Activity, Custom Activity have actions buttons for:
 - > Convert to Opportunity
 - > Convert to Case
 - > Mark as Complete
 - > Mark as Cancel

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

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



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



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



Appointment & Recurring Appointment Activities: You can select the default Required and Optional records (CRM) that will already be selected when the activity is to be created.

The screenshot shows the configuration page for an Appointment. At the top, there are tabs for Task, Fax, Phone Call, Email, Letter, Appointment (selected), and Recurring Appointment. Below these are buttons for Service Activity, Campaign Activity, Bookable Resource Booking, and Custom Activity. The main configuration area includes:

- Appointment:
- Default Color: #9039e3
- Overwrite Color By: None
- Tooltip Attribute: 5 selected
- Details Attribute: 7 selected
- Title Attribute: Subject
- Start Date: Start Time
- End Date: End Time
- Required:
- Optional: (Searchable list: test_5e09f2e6-1b93-48c9-a795-d8e387ef56b5, A. Datum, Adventure Works, Alpine Ski House, Blue Yonder Airlines)
- Email Reminder: On Off
- Minutes: 0
- Buttons Configuration: Convert To Opportunity, Convert To Case, Mark As Complete, Mark As Cancel

- You need to enable the checkbox of the **Required** and **Optional** CRM records. By clicking on the Search icon, you can select the relevant CRM records from the Lookup Records that will be pre-selected at the time of creating activities.
- So any member of your team will get the pre-selection of Required & Optional records as per your requirement.

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- Similarly, you can select the default Required & Optional for the Recurring Appointment activity.

The screenshot shows the configuration page for a Recurring Appointment. The 'Recurring Appointment' tab is active. Below the tabs, there are several settings:

- Recurring Appointment:
- Default Color: #bc8f8f
- Overwrite Color By: None
- Tooltip Attribute: 5 selected
- Details Attribute: 7 selected
- Title Attribute: Subject

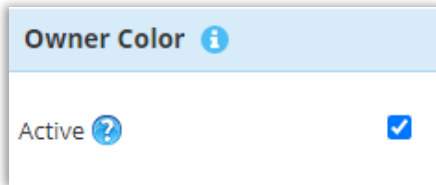
A red box highlights the 'Required' and 'Optional' sections, which contain lists of pre-selected resources:

- Required:** A. Datum x Trey Research x, Best o' Sales x Contoso, Ltd x, Contoso Fabrication x, Contoso Instrumentation x
- Optional:** test_5e09f2e6-1b93-48c9-a795-d8e387ef56b5 x, A. Datum x Adventure Works x, Alpine Ski House x, Blue Yonder Airlines x

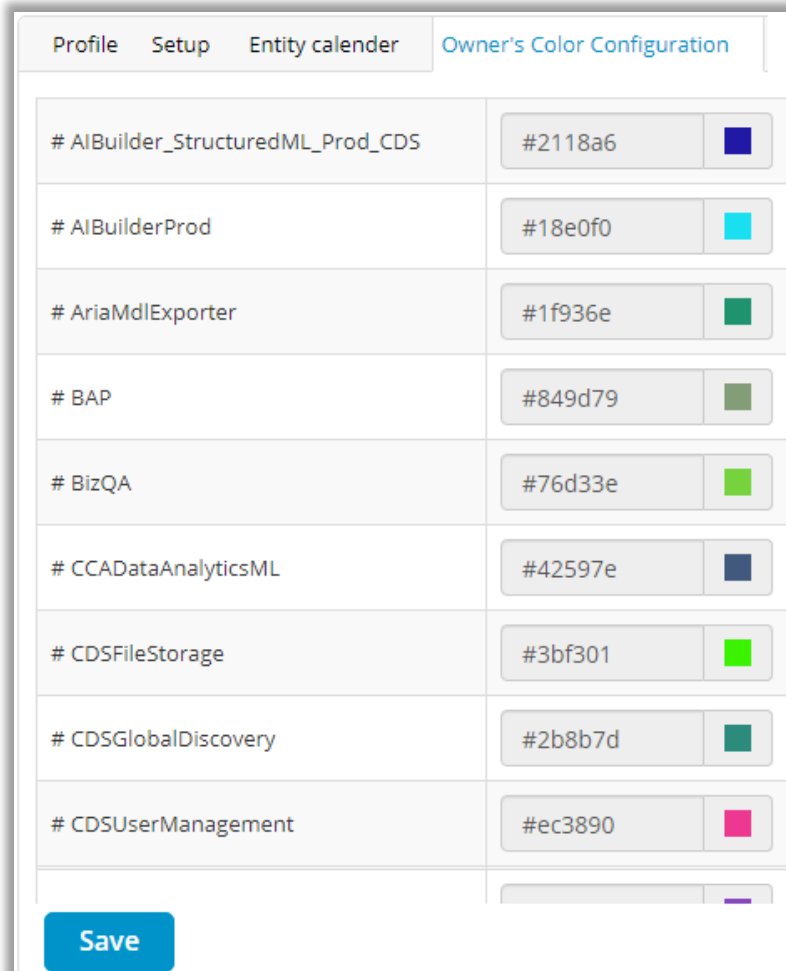
- So, when you or your team member adds an Appointment or Recurring Appointment activity, you will get these options pre-selected at the time of creating the activity.

Owner Color

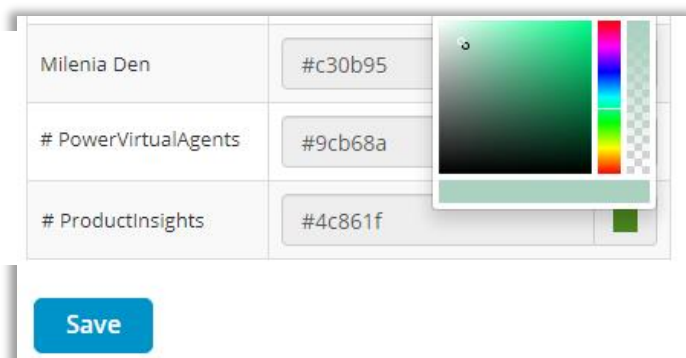
- To define the color of the activities based on owner that is CRM users. By enabling this option, you can differentiate the user wise activities in different color on the calendar.



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



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



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

Team

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

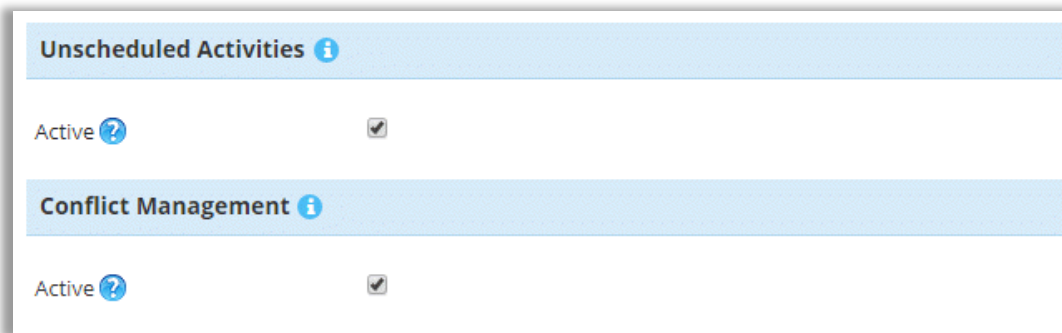


Business Unit

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

Unscheduled Activities

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

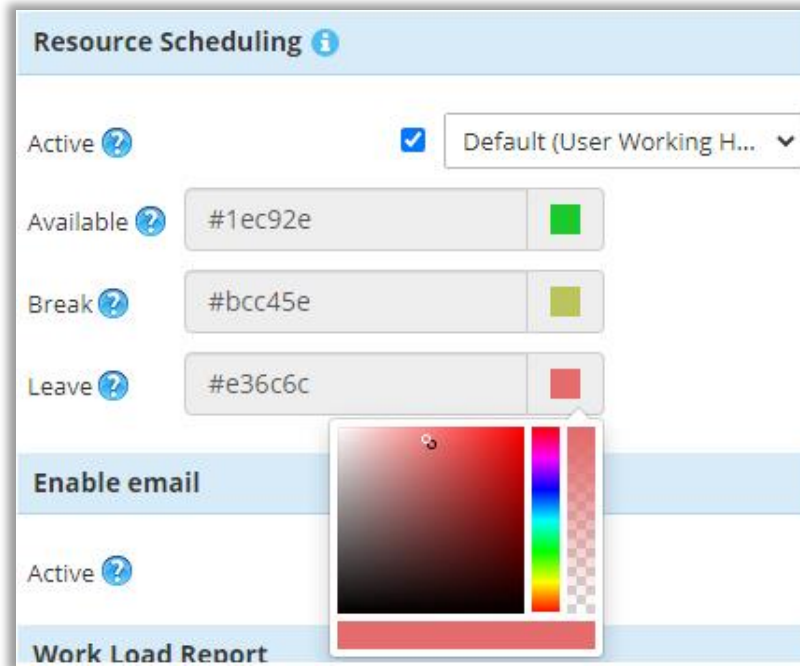


Conflict Management

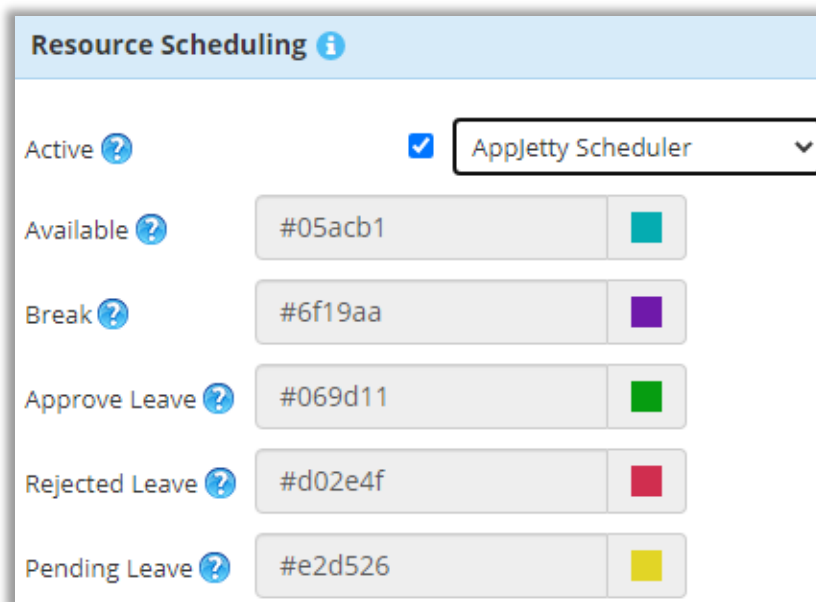
- To get alerts for conflicting activities based on time, check the Active box to enable **conflict management** in the calendar. On enabling conflict management, you get **alert message** when conflicts occur at the time of scheduling of appointments or service activities.

Resource Scheduling

- To enable the "Resource Scheduling" module, 'check' the check box. After selecting this option, you can select the **Default (User Working Hours)** or **AppJetty Scheduler**.
- If you have selected the **Default (User Working Hours)**, the color selections for different activities will be appear. You can differentiate the Available resource, Break & Leave status as per the color combinations for the default resource scheduling.



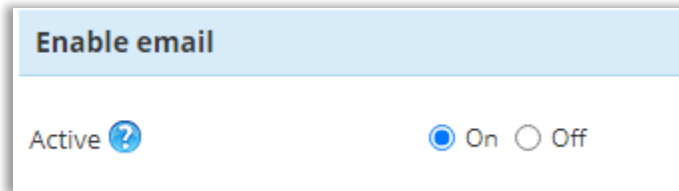
- If you have selected the **AppJetty Scheduler**, the color selections for different activities will be appear. You can differentiate the Available resource, Break & Leave statuses as per the color combinations.



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

Enable Email

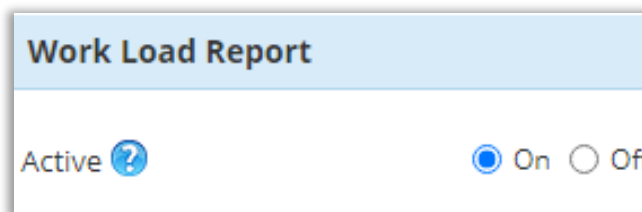
- You can enable the 'Email' option to send an Email to the Required/Optional attendees when the activity is created. Click the **On** to enable the Email facility.



- When the users add the appointment activity, the Email will be sent to the selected Required/Optional attendees (CRM Users/Teams).

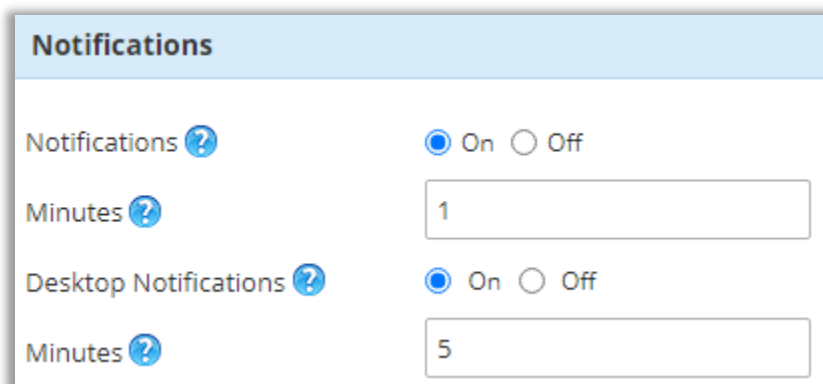
Work Load Report

- You can enable the "Workload Report" in the calendar to check and filter the activities as per the time duration and selecting the Users/Teams.
- Click on the "On" option to enable the Workload Report in the calendar view.



Notifications

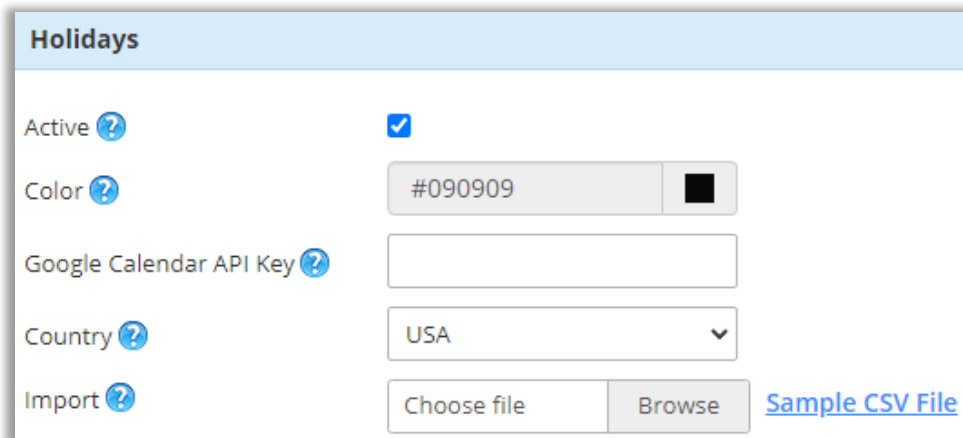
- To manage the notification reminder of the activities, navigate to the '**Notifications**' section. You will get the two options: **Notifications** for the Calendar page and **Desktop Notifications**. Click on the **On** option to enable.
 - Notifications:** You will get the notification reminder about upcoming activity when you are on the Calendar page.



- Desktop Notifications:** You will get the notification reminder about upcoming activity as Desktop Notifications.
- Minutes:** Set the minutes to be notified just before starting the activity.

Holidays

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



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

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

- Import:** You can import the CSV file of the holidays and display into the calendar. You need to follow the Sample CSV File format to upload the CSV file here.

	A	B	C
1	Title	Start Date	End Date
2	Holiday 1	01-05-21	02-05-21
3	Holiday 2	10-05-21	11-05-21
4	Holiday 3	20-05-21	21-05-21
5	Holiday 4	26-05-21	27-05-21
6			

- Once you have uploaded the CSV file for the holidays, click on the **Save** button and the holidays will be displayed in the calendar.

Locations

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

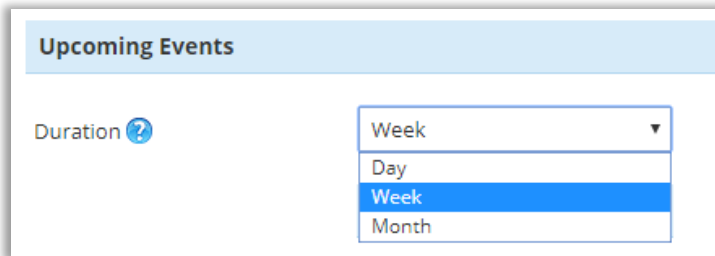


- If enabled, you need to enter Google Autocomplete API key that you have in order to get location suggestions.

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

Upcoming Events

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



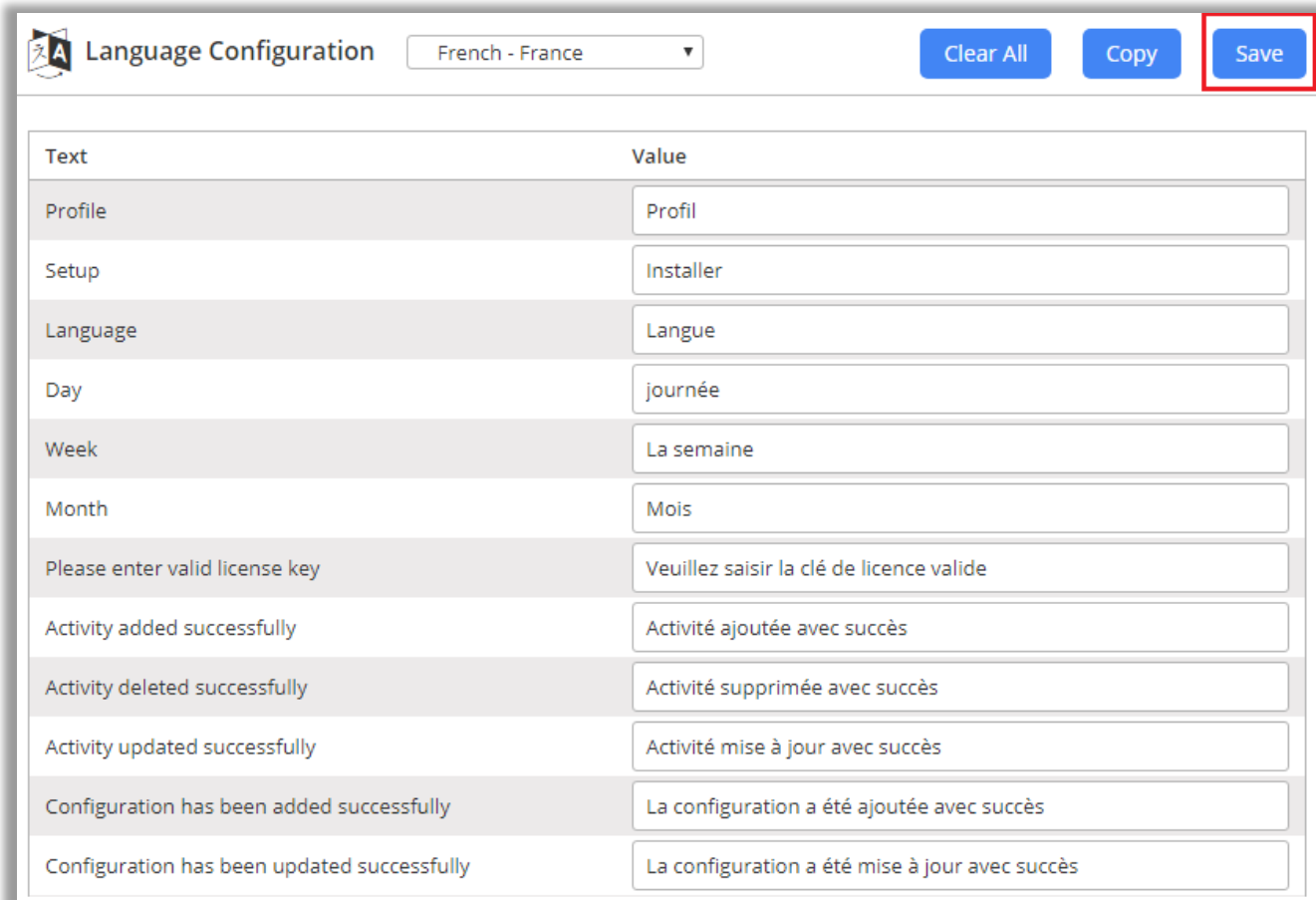
- Duration:** You can select the any of the default view for 'Upcoming Events' from the Day, Week or Month.



- Save:** After configuring the Views, Activities & other relevant options, click on 'Save' button to save all the configurations settings for Calendar 365.

Configure Languages

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



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

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

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

Entity Calendar

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

Profile	Setup	Entity calendar
Views		
Calendar View ?	Top Down View	▼
Time Scale View ?	Day	▼
Number Of Days ?	3	▼
Title Format ?	D MMMM, YYYY	▼ 7 July, 2021
Time Format ?	12 Hour Format	▼ 02:35 PM
Slot Duration ?	60 Minutes	▼
Minimum Duration ?	08	▼
Maximum Duration ?	20	▼
Default Weekend ?	On	▼

Calendar View:

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

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

- > Gantt View > Top-Down View
- > Timeline View > Agenda View

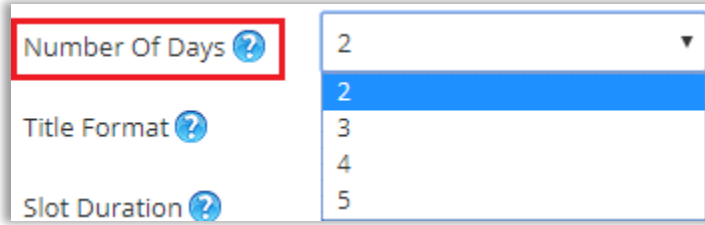
Time Scale View:

Time Scale View ?	Month ▼
Number Of Days ?	Day
	Week
	Month

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

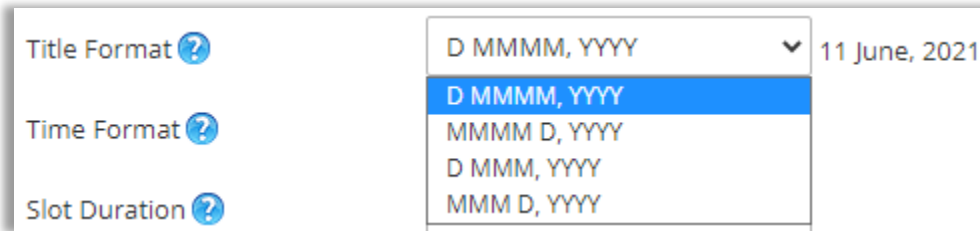
- > Day > Week > Month

▪ **Number of Days:**

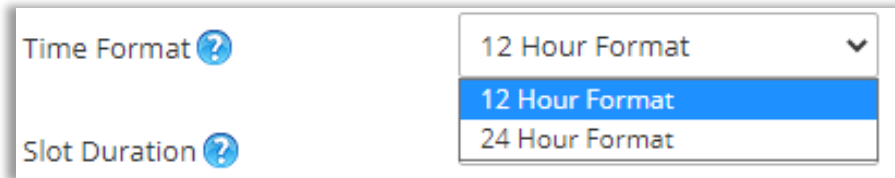


- Select the number of days in which you would like to view the calendar from the Day Span View.

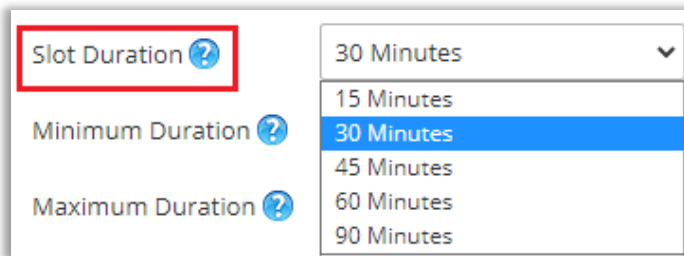
- **Title Format:** Select the format to display on Calendar. The format that you select here will be displayed when you select Day, Day Span and Week view for Calendar.



- **Time Format:** Select the time format to display on Calendar. Select **12 Hour Format** or **24-Hour Format**.

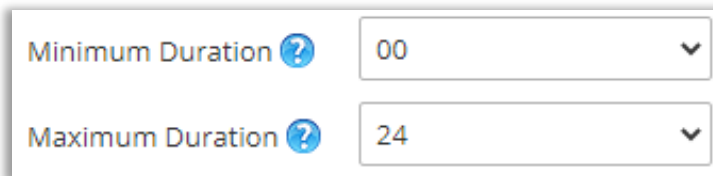


▪ **Slot Duration:**





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

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



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


- **Default Weekend:** You will get the Default options for the weekend in the calendar.



Default Weekend  

Configure Entity For Calendar

- After configuring the Views of the Entity Calendar, by scrolling down, you will get the Configure Entity for Calendar section.
- Under this section, you can configure the CRM Entities to display on the calendar of the Calendar 365. You need to configure the attributes and details of the entity to display on the calendar.
- If the entity is already created, you will get in the list. By clicking on the **+ Create** button, you can create a new entity calendar by selecting any CRM entity for that you want to display.

Configure Entity For Calendar

+ Create 

Entity	Entity Calendar Name	Actions
Case	Case Calendar	 

Showing 1 to 1 of 1 entries



Previous **1** Next

User Manual: Calendar 365- "Installation & Configuration"



- As you click on the **+ Create** button, you will get the attributes & fields to configure the calendar display.


Configure Entity For Calendar



+ Create



Entity	Entity Calendar Name	Actions
Case	Case Calendar	 



Showing 1 to 1 of 1 entries Previous 1 Next



Entity  [Deprecated] Dynamics ... 



Entity Calendar Name 



Default Color  #178d1e 



Overwrite Color By  None 



Tooltip Attribute  Name, Owner 



Details Attribute  Name, Owner 


Title Attribute  Name 

Start Date  Created On 

End Date  Select 

Filter By  None selected 

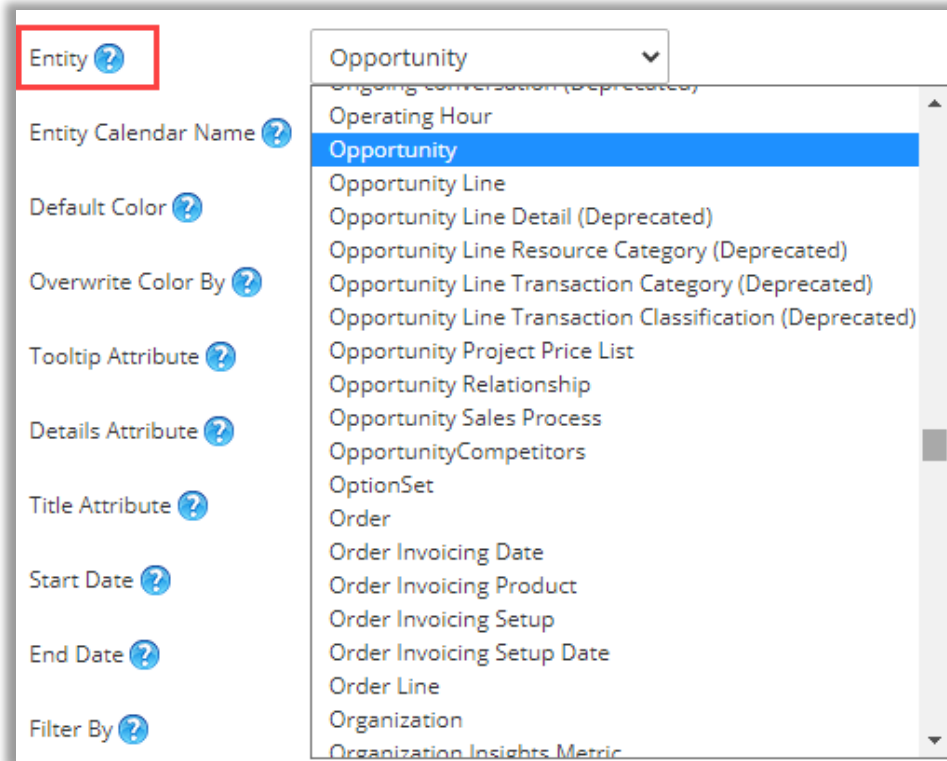
Search by Attribute  Name 

Share Calendar  Public Private

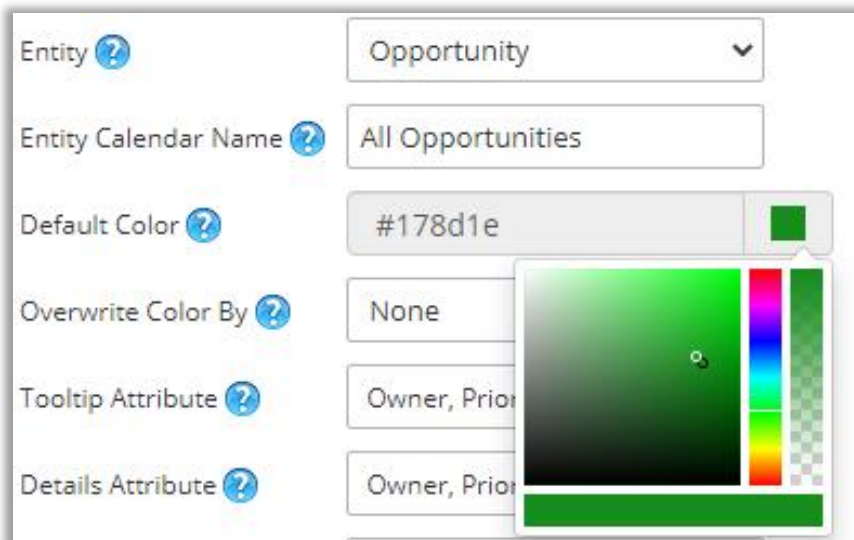
Save **Cancel**

- You need to select the required attributes and fields as you want to show and display the calendar of the entity.

- **Entity:** Select the CRM Entity to create an Entity calendar for that. You will get the Entity's drop-down list.



- As you select the entity from the list, the default attributes & fields will be selected based on which Entity is selected.
- **Default Color:** You can select the entity color to identify on the calendar. Choose the relevant color for the entity from the Color Picker tool.
- **Overwrite Color By:** You can select Overwrite Color as **By Status & By Priority**. If you want to select the color as per the "activity status", you can select the color for **Open, Completed** and **Canceled** status.

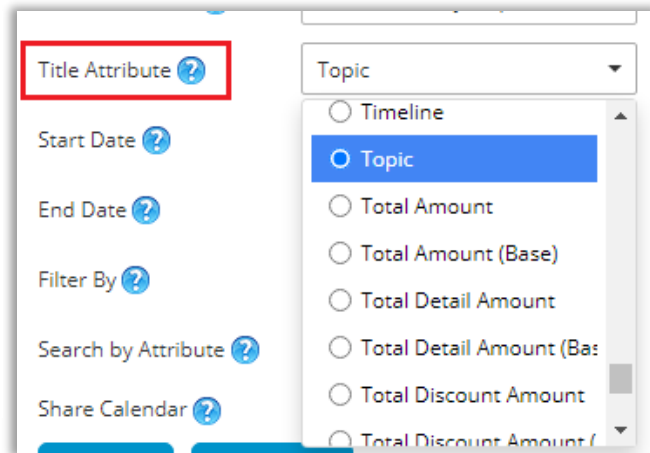


- **Overwrite Color By:** You can select Fields of the Entity to display the entity as per the Field's values in different color. If you have selected the field "Type" of the entity, you can select the color for its Fields **Word based**, **Item based**, and **Service-Maintenance based**.

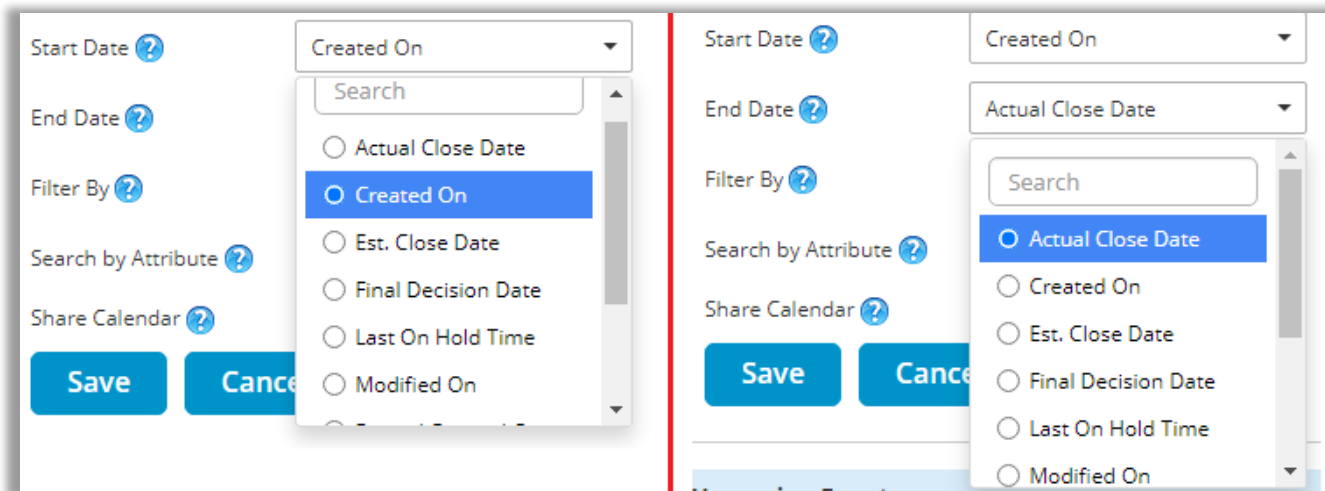
- You will get the individual color picker tool to choose the color for the specific Field's value.
- **Tooltip Attribute:** Select the **tooltip attributes** from the dropdown list of the attributes. The selected attributes will be displayed in tooltip that appears on **hovering** any entity records in the calendar. Check the boxes besides attributes that you wish to include.

- **Details Attribute:** Select the **details attributes** from the dropdown list of the attributes. The selected attributes will be displayed in entity record details that appears **on clicking** the records in the calendar. Check the boxes besides attributes that you wish to include.
- You can select a maximum **10 attributes** and **minimum one** attribute for both. If exceeded, it will show validation message stating to select at least one attribute.

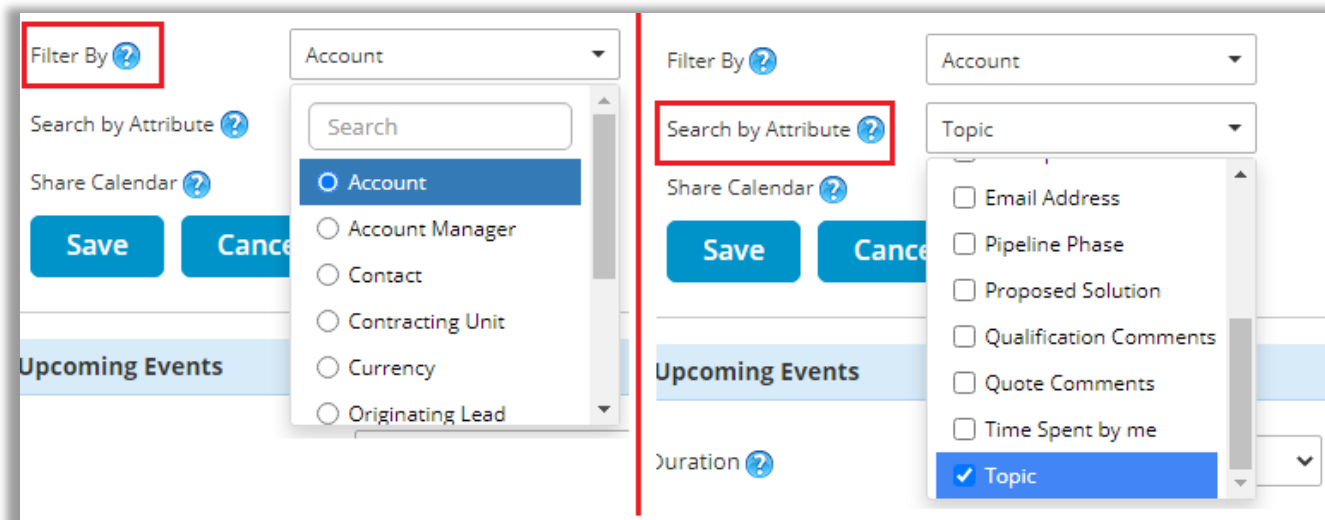
- **Title Attribute:** You can select the **title attribute** to be displayed as the **title** of entity records in calendar.
- The 'Title Attribute' comes with default selection of **Name** attribute. You can select only one attribute from the list of different attributes.



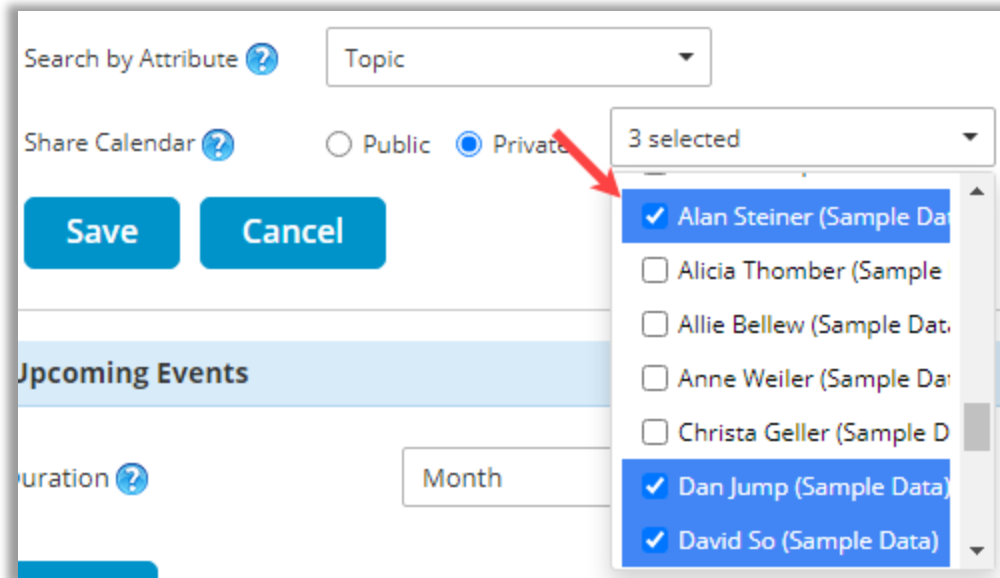
- **Start Date:** View the entity records on the calendar based on the selection of its action. Select the action for the Start Date. *i.e.*, Created On



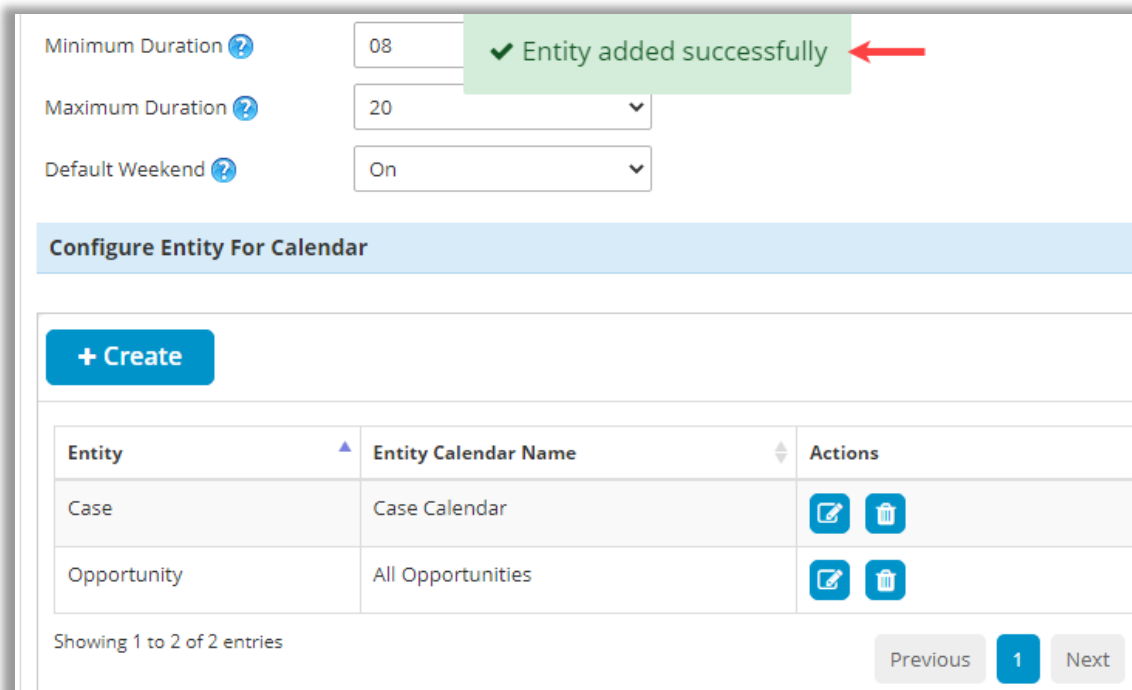
- **End Date:** View the entity records on the calendar based on the selection of its action. Select the action for the End Date. *i.e.*, Actual Close Date
- **Filter By:** Select an attribute to filter the entity records as per which attribute. *i.e.*, Account



- **Search by Attribute:** Select the attributes to search the entity records by inserting the text. You can select maximum **10 attributes** and **minimum one** attribute for both.
- **Share Calendar:** While creating the entity with attribute configuration, at that time you can decide whether you want to share with everyone or need to share with the specific CRM users/teams.



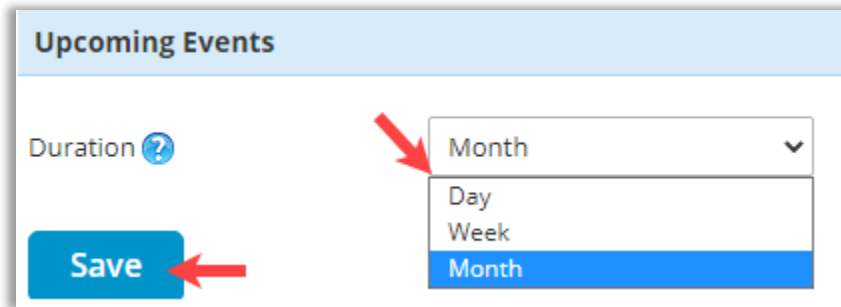
- If you select the **Public**, it will be shared with everyone. But if you select the **Private**, you need to select the CRM users/teams from the dropdown list.
- Once the attributes & required fields are selected for the Entity calendar, click on the **Save** button.



- You will get the alert message that the entity for the calendar is added and that Entity to display in the calendar will be listed.

Upcoming Events

- You can set the default view of the 'Upcoming Events' from this section. You can set its duration as per Day, Week, or Month.

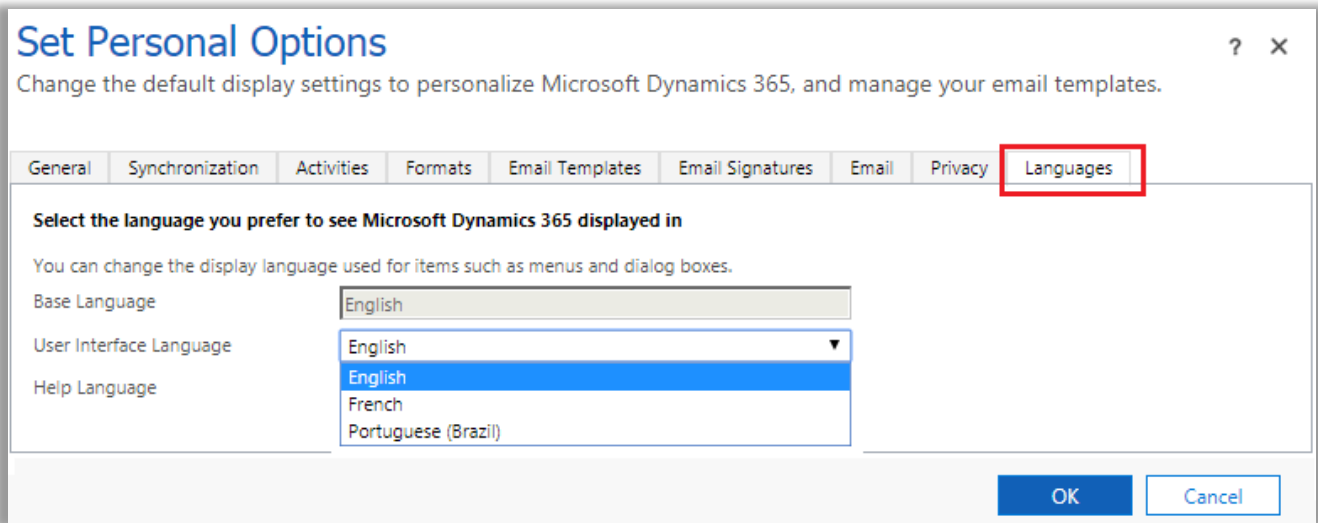


- After configuring the details for the Entity calendar, click on the **Save** button to apply the changes to the Entity Calendar.

Other Configuration for Calendar 365

Multi-language Calendar labels

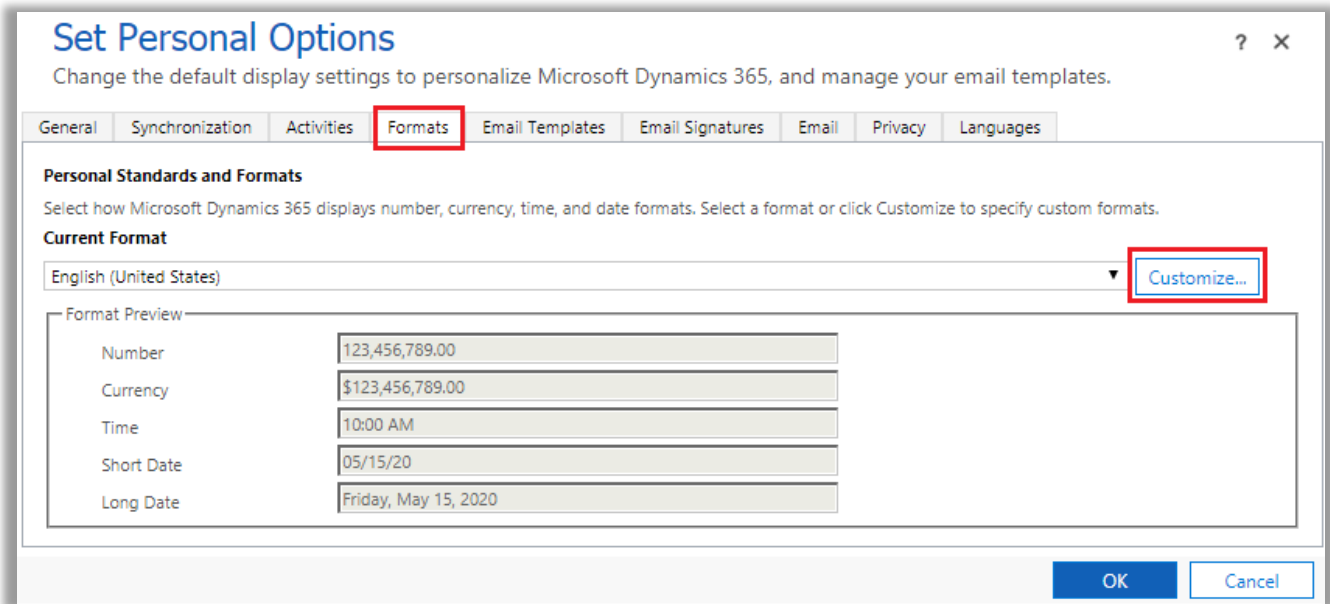
- You can select the different languages for the labels of the default CRM on the Calendar365.
- Navigate to **Settings** → **Personalization Settings** → select the **Language** Tab. From here, select the language for the **User Interface** in which you want to see the labels for Calendar 365.



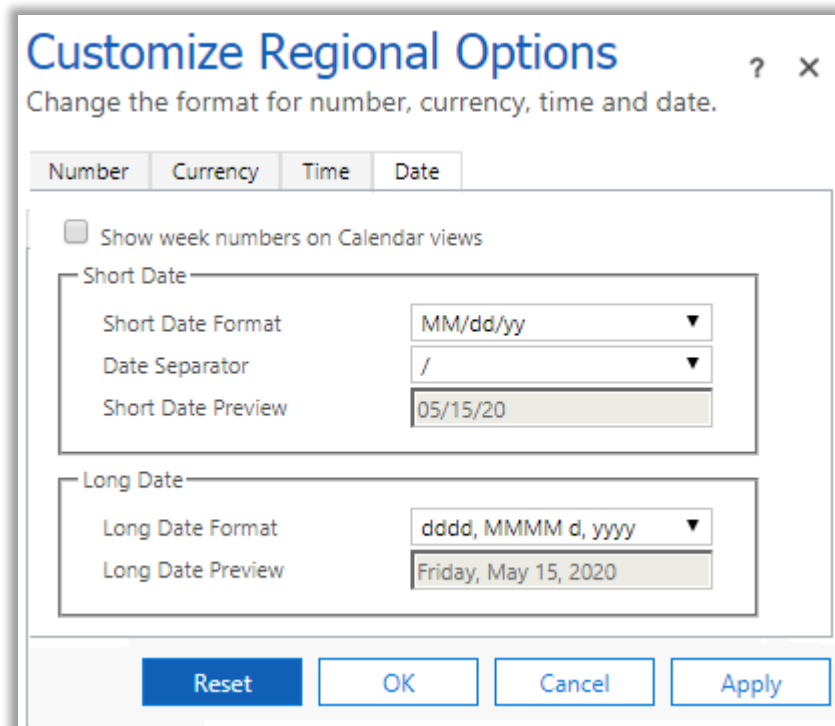
- After selecting the language, click the **OK** button to save the settings. Now, you can see the labels in the Calendar365 as per the selected language.

Dynamic Date Formats

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



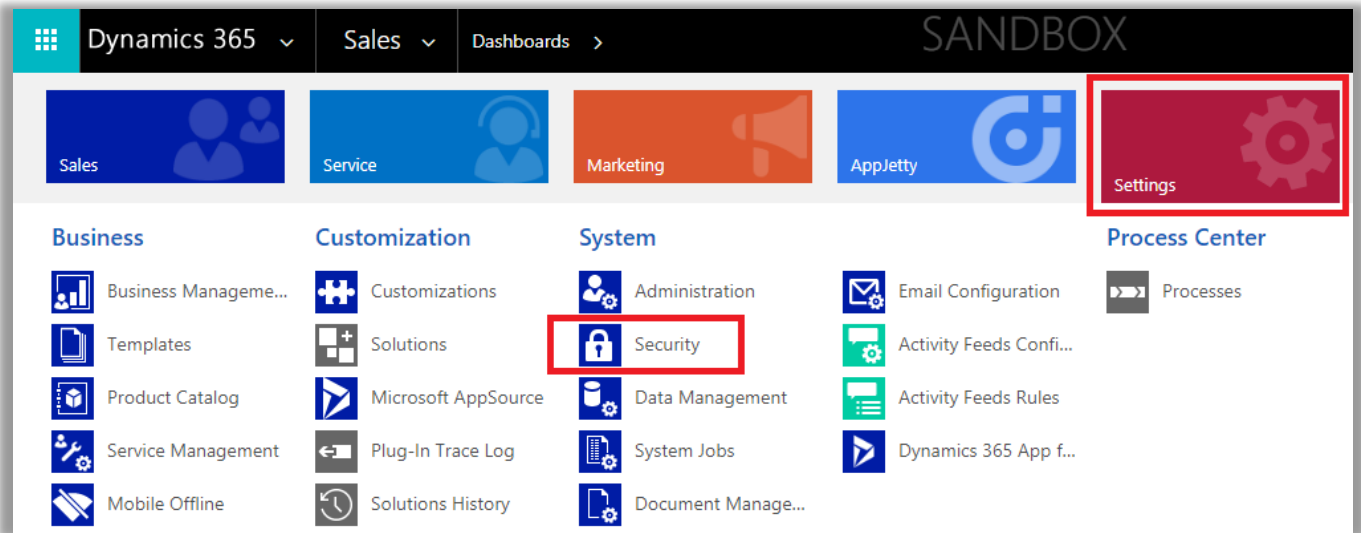
- Now click on the **Customize** button, the Customize Regional Options window will open.
- You can select the Date Format i.e., MM/DD/YY or DD/MM/YY and Separator.



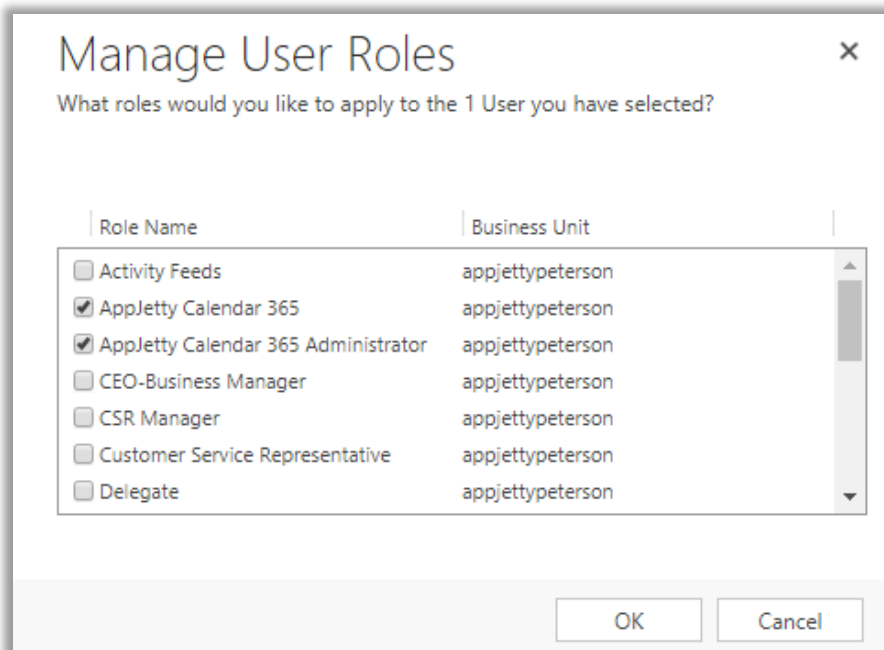
- Based on the format selection here, you will get the date format in date picker of Calendar365.

Assign User Role

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



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



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

Contact Us

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



Live Chat

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



Tickets

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

Customization:

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