MTC Management Technology Consulting LLC

Microsoft Dynamics CRM / XRM Platform

Activity Calendar
For Microsoft Dynamics CRM

User Guide

Microsoft Dynamics CRM

CRM Versions Supported : CRM 2013, CM 2015 and Online

Activity Calendar is a Microsoft Dynamics CRM 2013 is an add-on enhancement that allows organizations to be more joint effort interactive participation by allowing users to view Activities in the CRM calendar of multiple users within their organization.

Activity Calendar is intended for implementation by solution professionals.

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Table of Contents

Table of Figures

Product Overview

Activity Calendar is a Microsoft Dynamics CRM 2013 or CRM 2015 an add-on enhancement that allows organizations to be more joint effort interactive participation by allowing users to view Activities in the CRM calendar of multiple users within their organization.

The key features of Activity Calendar are:

- CRM users to view Activity calendar
- All activities like phone, appointment, task etc. are available to view in calendar
- Displays activities for one or more users
- Relationship between Account & Activity
- Relationship either on 1:N relation or N:1 relation
- Simple overview to control conflicts
- One simple Calendar for one and all
- View calendar as per your choice – day, week, month, year
- User specific rights assigned for every user
- Filter the results as you're your need
- Acts as Office admin tool for the executives
- Drag and Drop facility to move activities across dates

> **Note: The Activity Calendar should be imported to CRM**

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License Key

- To install Activity Calendar you will require License key, which you can get by sending an email Request to salesteam@mtccrm.com with your Organization Unique name.

- To access your Organization Unique name click on settings→Customizations→Developer Resources as shown below figure
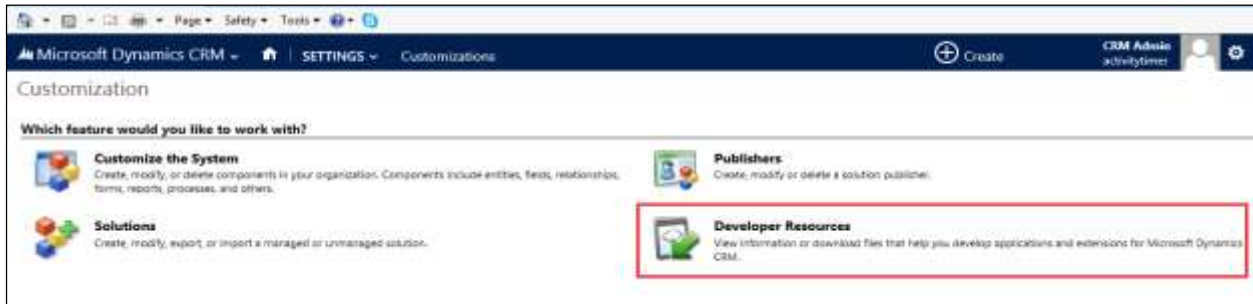
Figure 1: Developer Resources

- A window will pop up with Organization Unique Name as shown
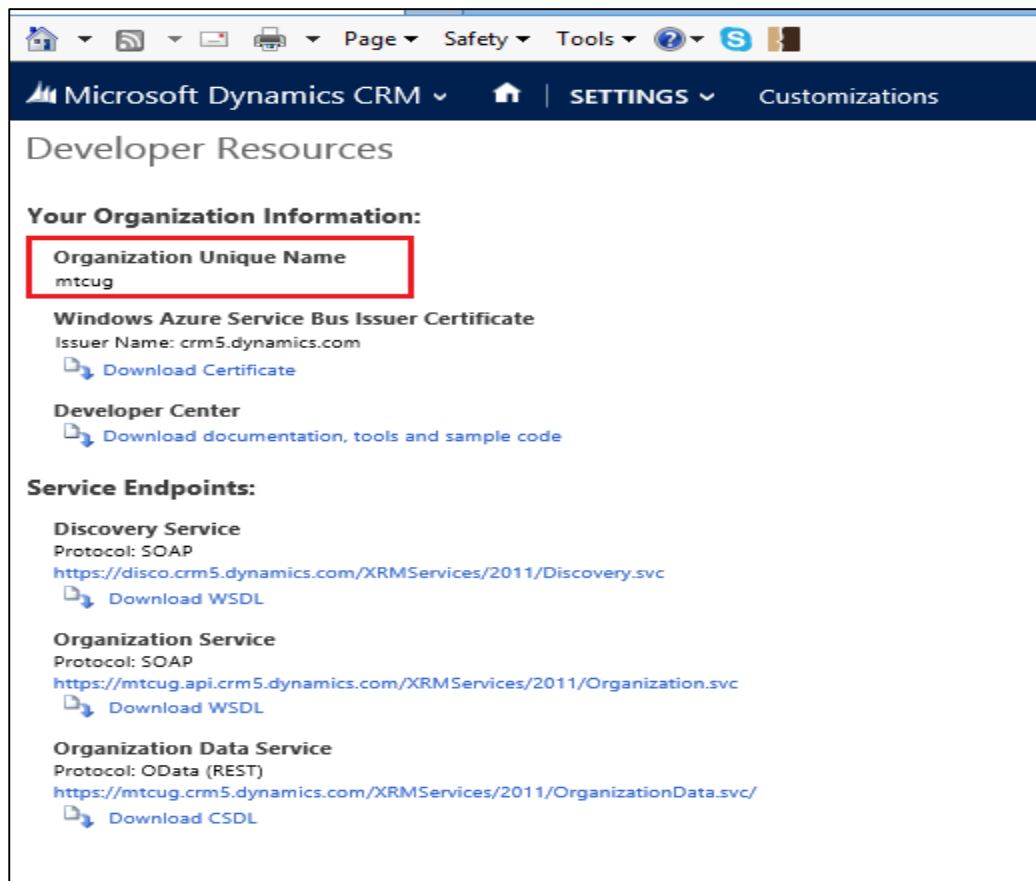
Figure 2 : Organization Unique Name

NOTE: After placing the request you will receive the LICENSE KEY within 24

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Installation Process

To install the Activity Calendar the following steps has to be followed

STEP 1:
- Go to http://www.dynamicsexchange.com/AC.aspx click on Download to get Solution.

STEP 2:
- On Downloading you will get ActivityCalendar_2_0_0_2.zip (ZIP file).

- Extract the files from the downloaded folder. You will get two WINRAR ZIP files.

ActivityCalendar_2_0_0_2_managed.zip   Licensing_1_0_3_0_managed.zip

NOTE: To install the **Activity Calendar, Solution** need to be imported into CRM

STEP 3:
- Open your CRM click on **settings→solution→import** it will open import Solution window.
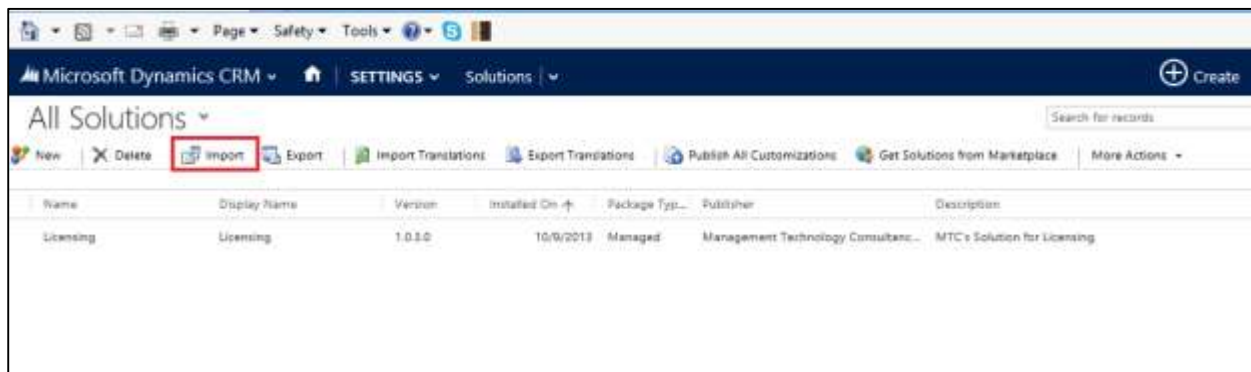
Figure 3: Import Solution

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.

Installing Licensing Solution
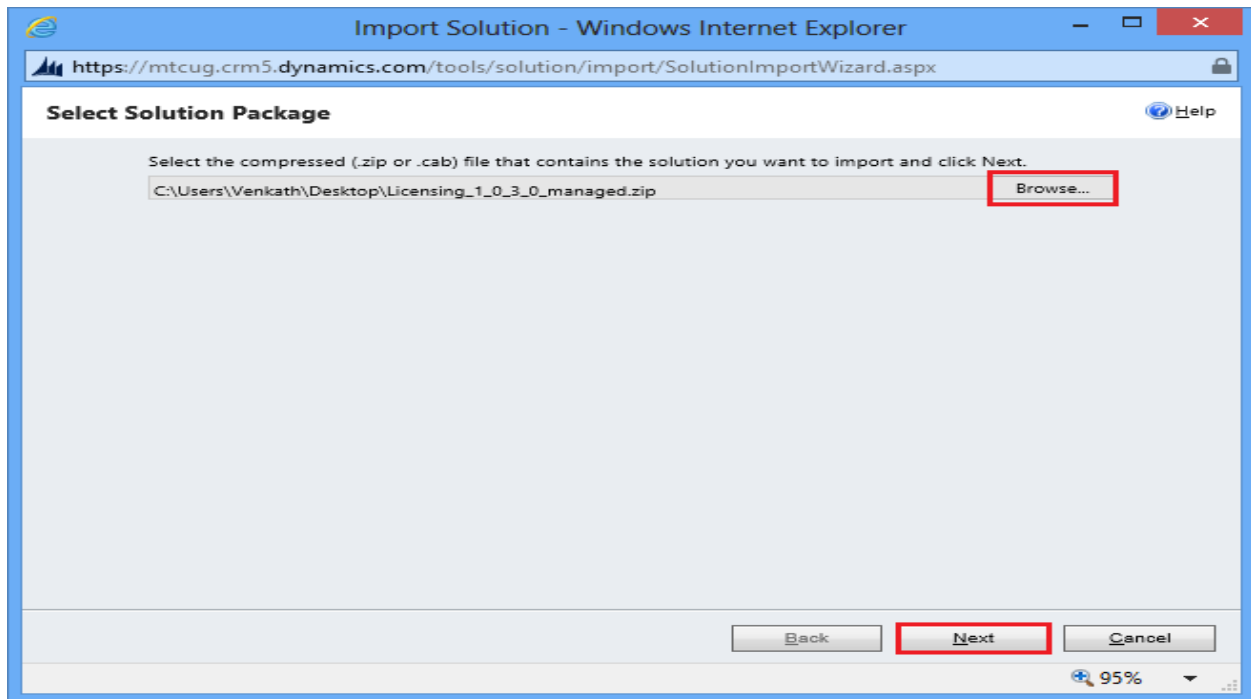
Figure 4 : Select Solution Package

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.
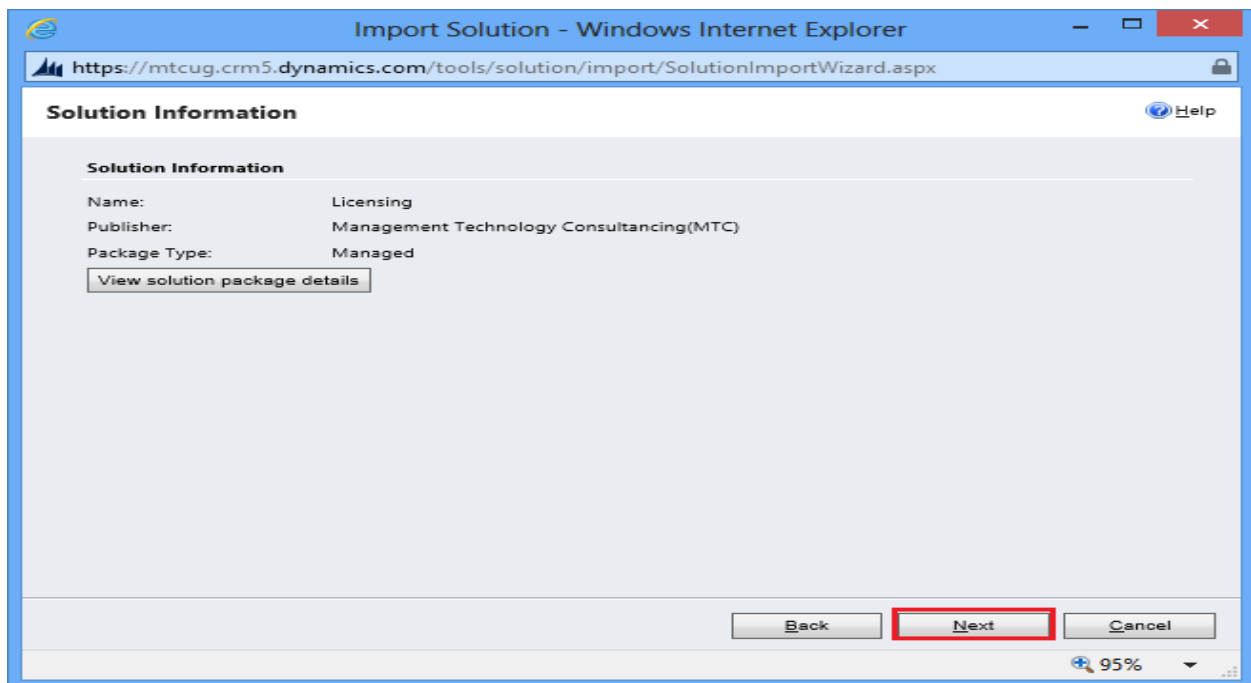
Figure 5: Importing Options window

- Click on Next to proceed
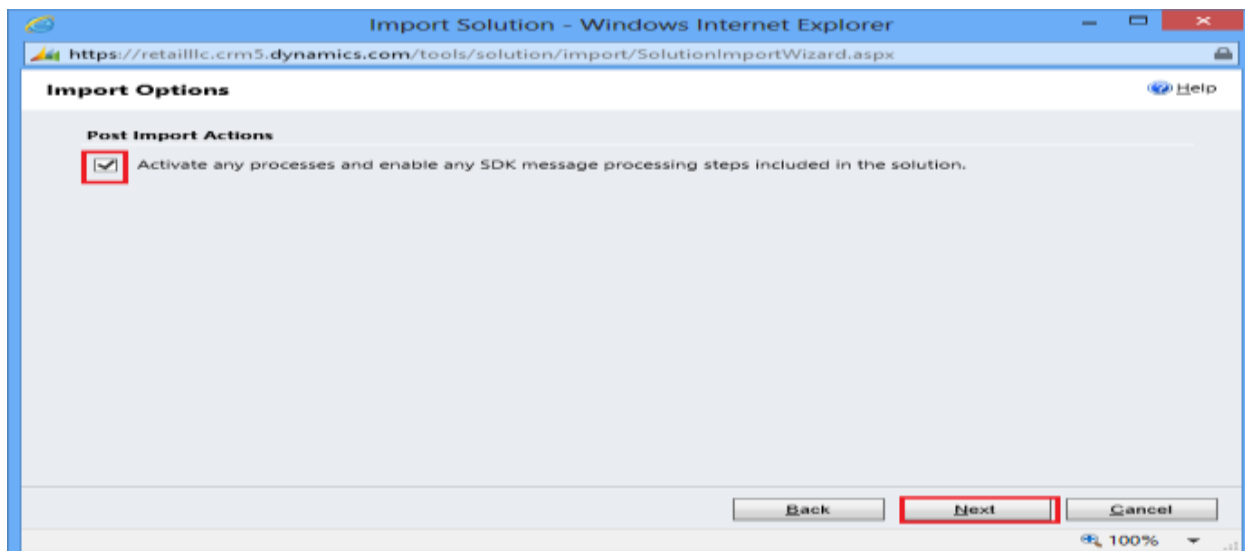
Figure 6: Import Option

- Click on Next to proceed
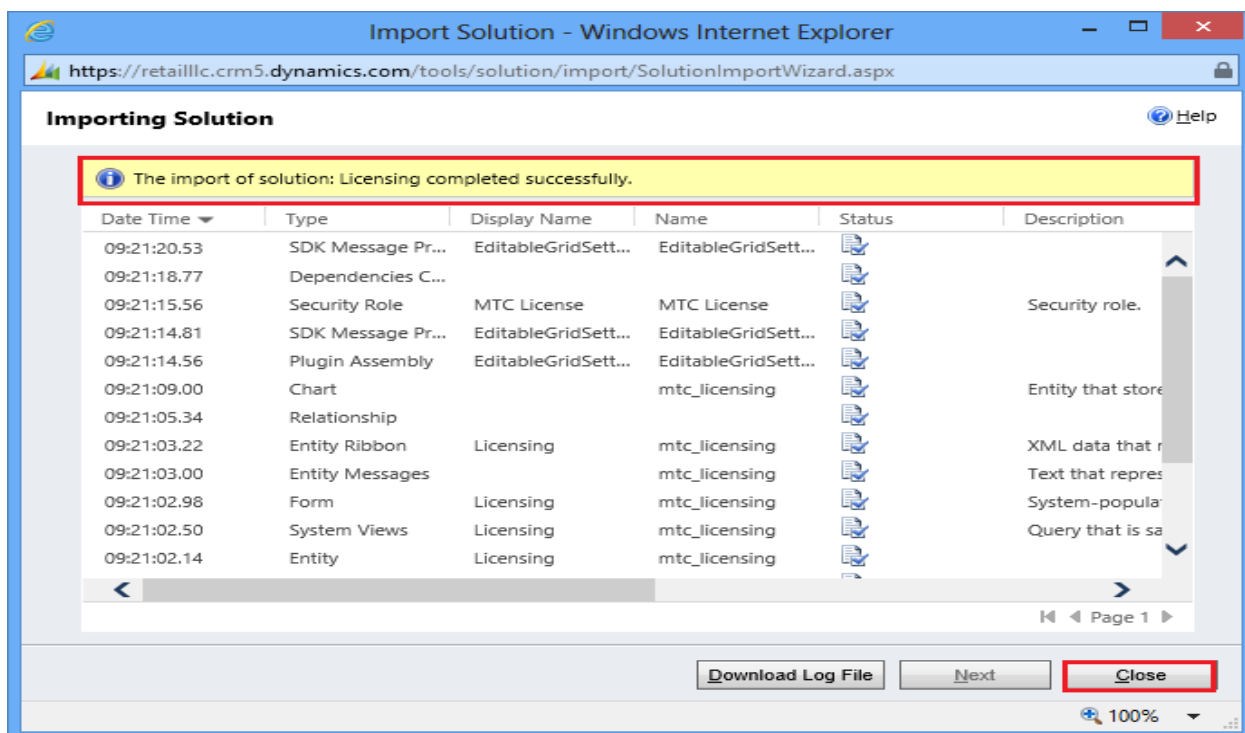
Figure 7: Importing Solution – Licensing

- Click on Close after successful completion message is displayed.

Installing Activity Calendar Solution
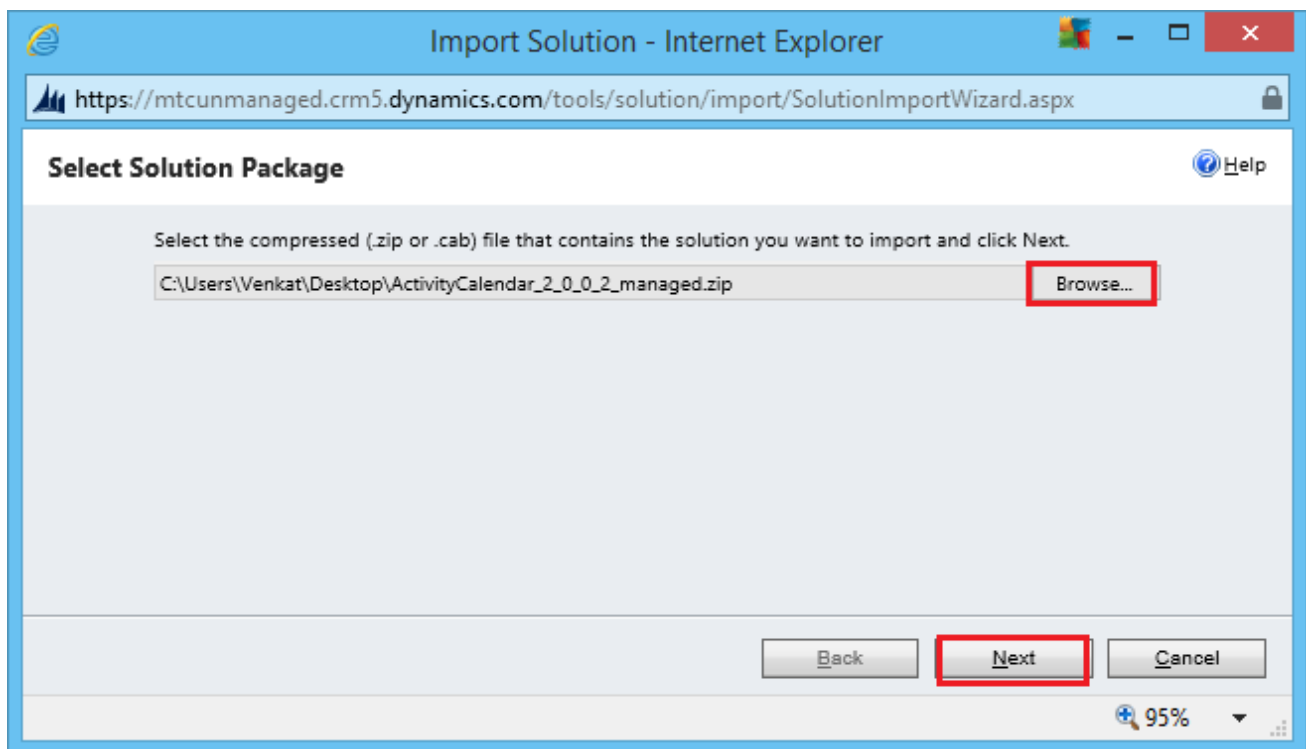
Figure 8: Import Solution

- Solution information window will open. It gives the solution package details and general information. Click on Next to continue.
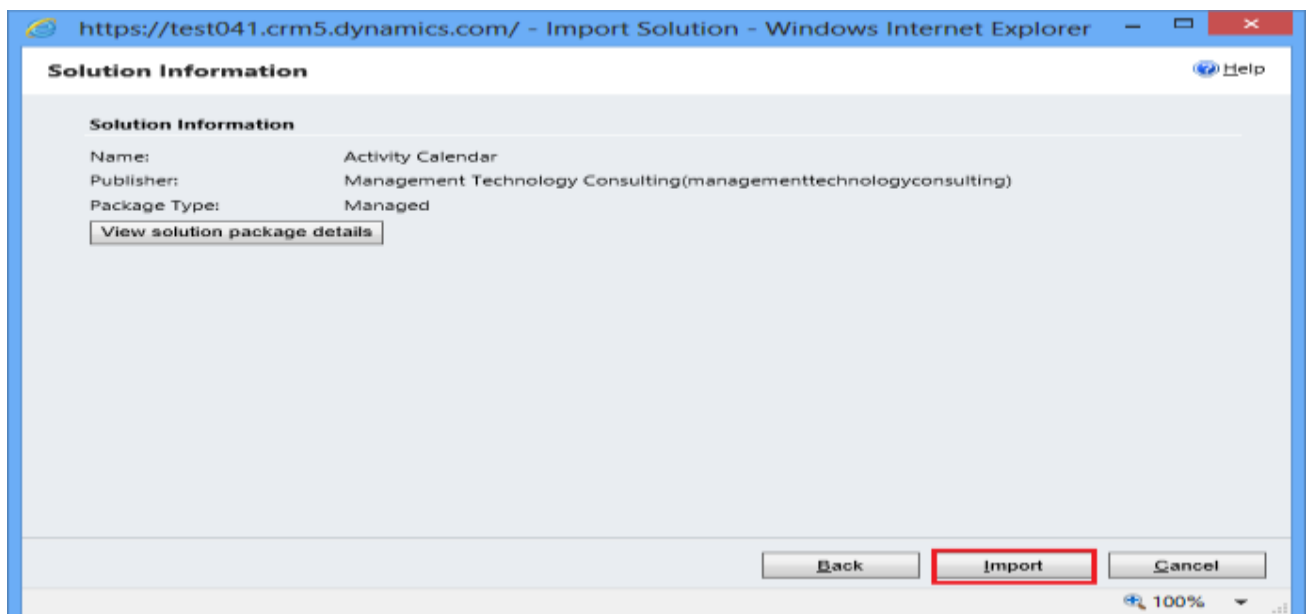
Figure 9: Solution Information

- Click on next it will open importing solution window in that dialog will be opened displaying the message importing the customization please wait for the operation to complete.

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For Microsoft Dynamics CRM

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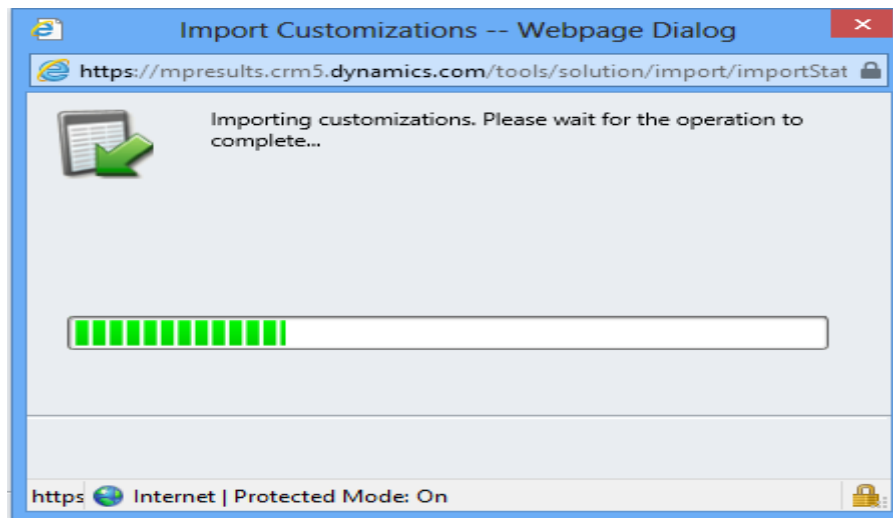
Figure 10: Importing customization
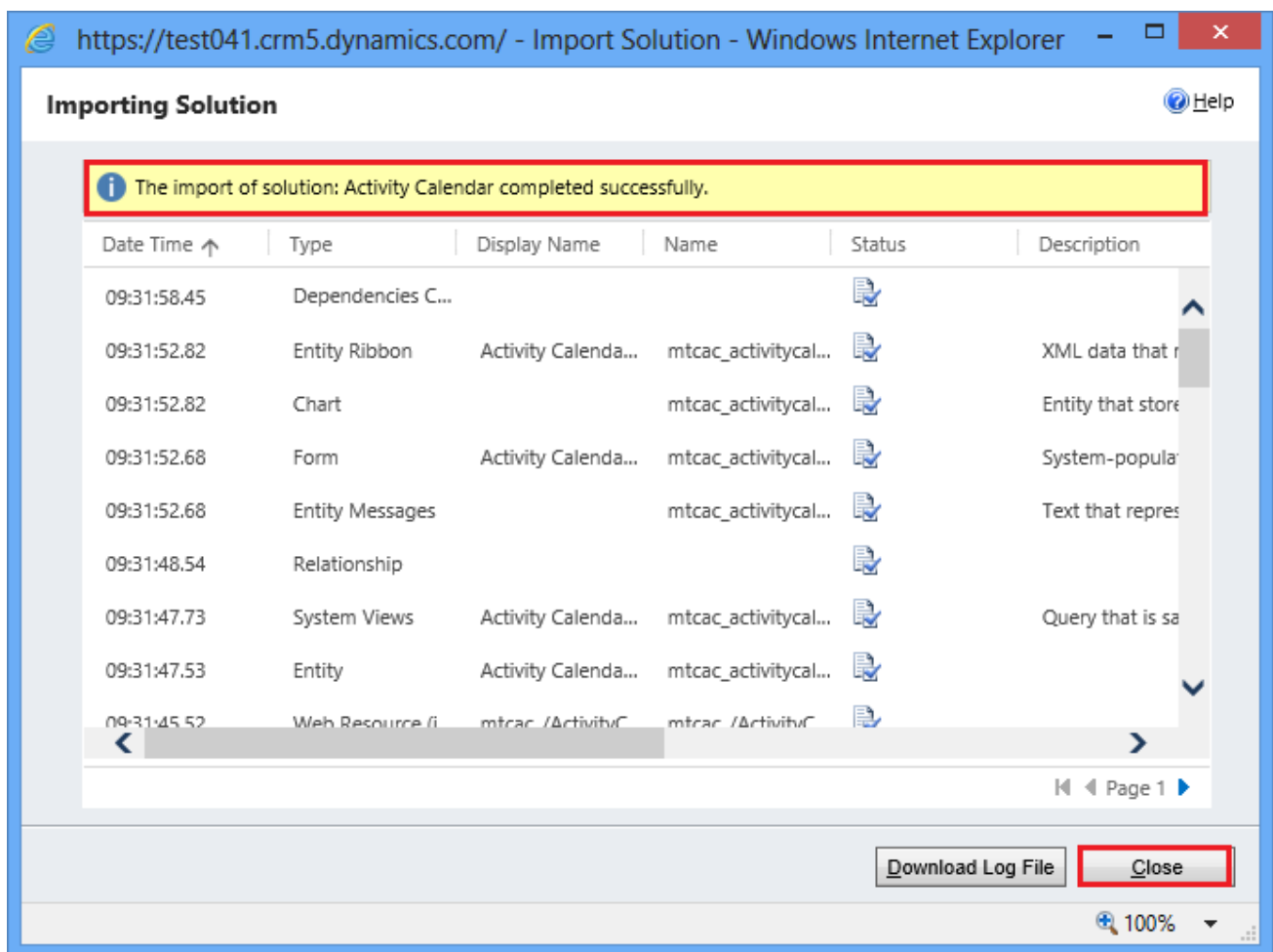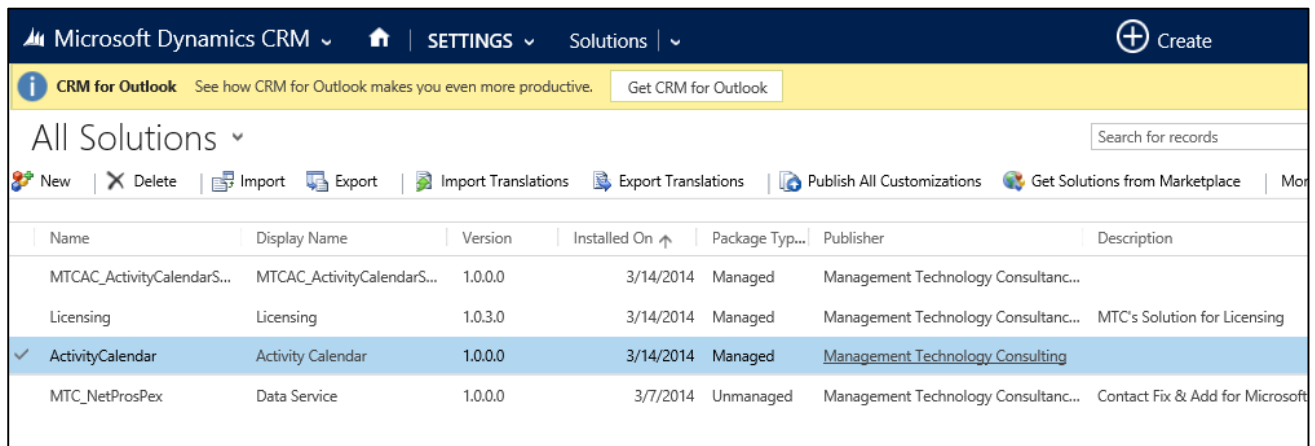
Figure 11: Importing Solution

- Select the product as **Activity Calendar and double click**

Placing License Key

- **CRM->Settings->Solutions**-> double click on Activity Calendar Solution

Figure 12: CRM showing the Solution installed

- Click on Activity Calendar Solution , which opens a new screen as shown below
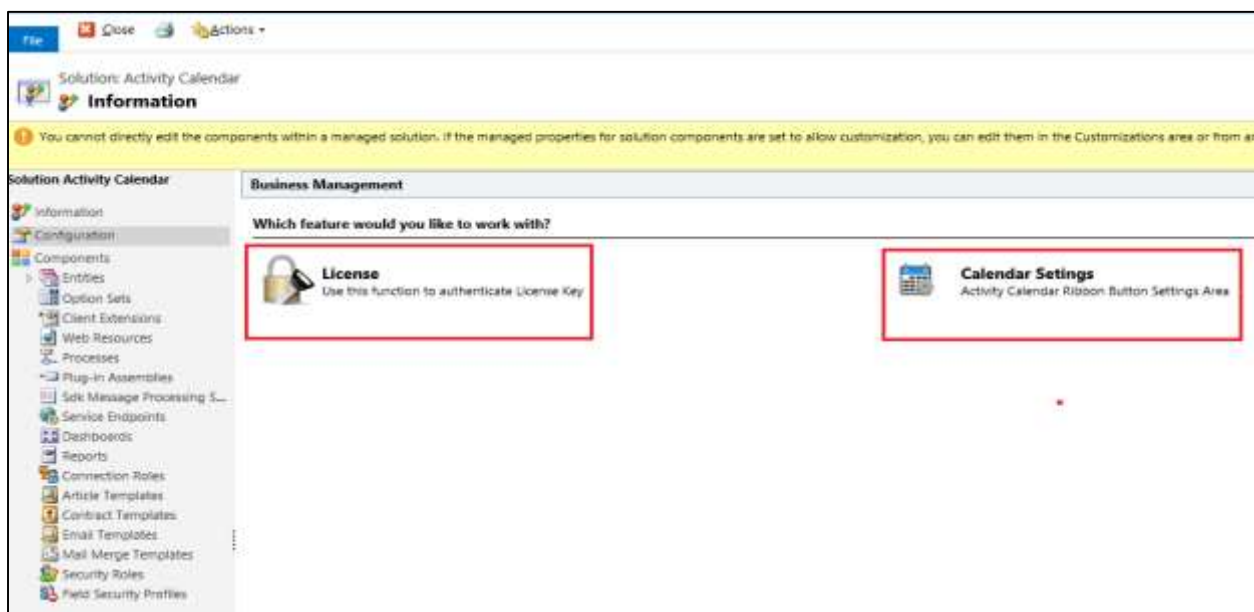
Figure 13: Activity Calendar Configuration

- Click on Licensing

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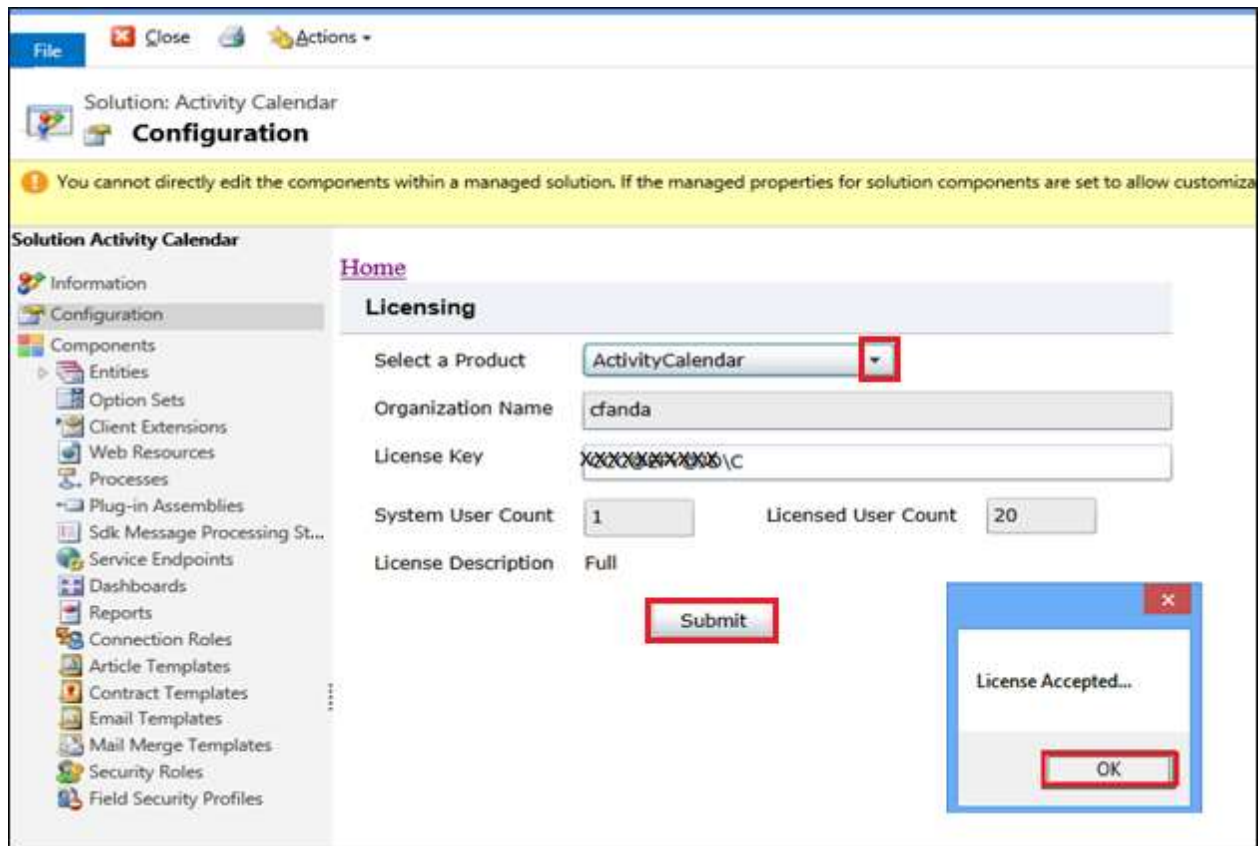
Figure 14: Placing of License Key

- Select Product as Activity Calendar

- Copy & Paste the License key which you have received from salesteam@mtccrm.com

- Click on Submit

- A pop up window appears and displays the message as License Accepted. Click on OK.

Activity Calendar Settings

- Now Click on Calendar Setting
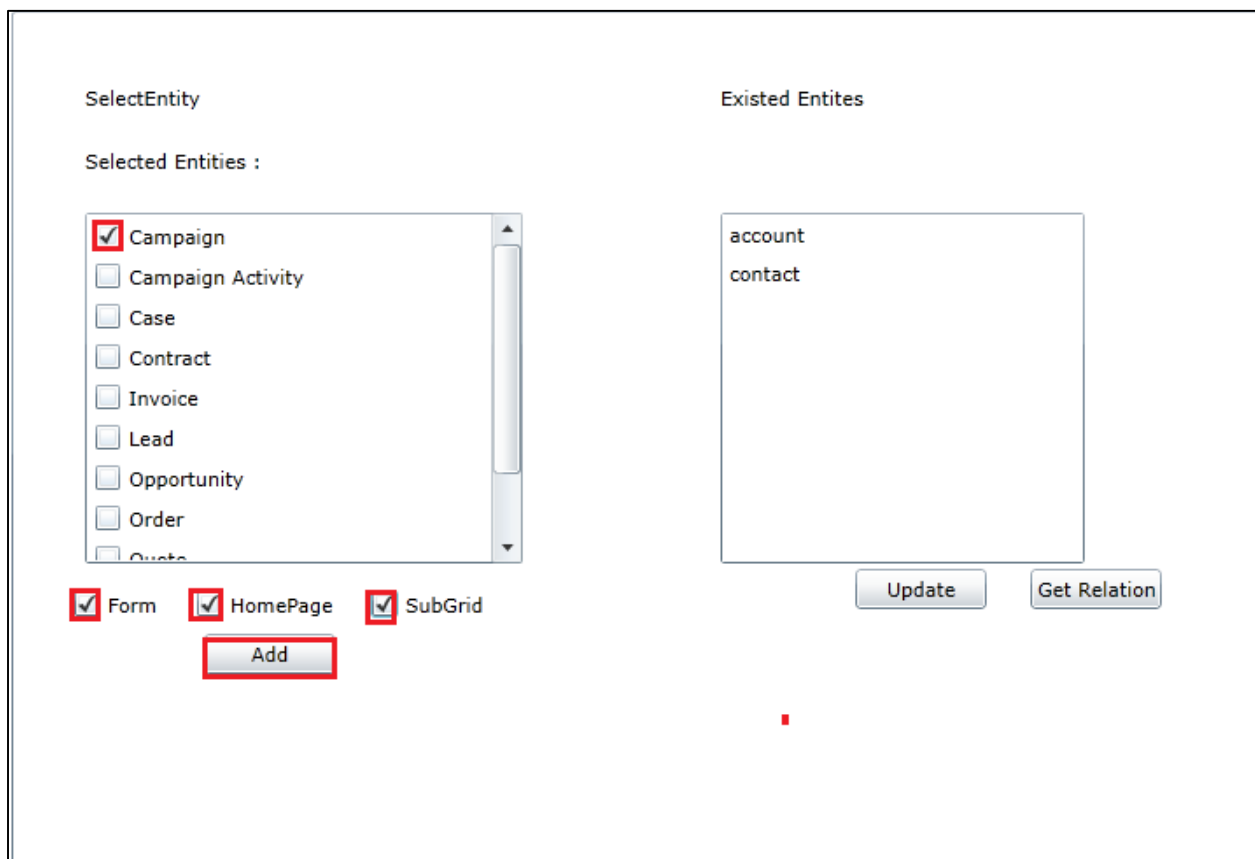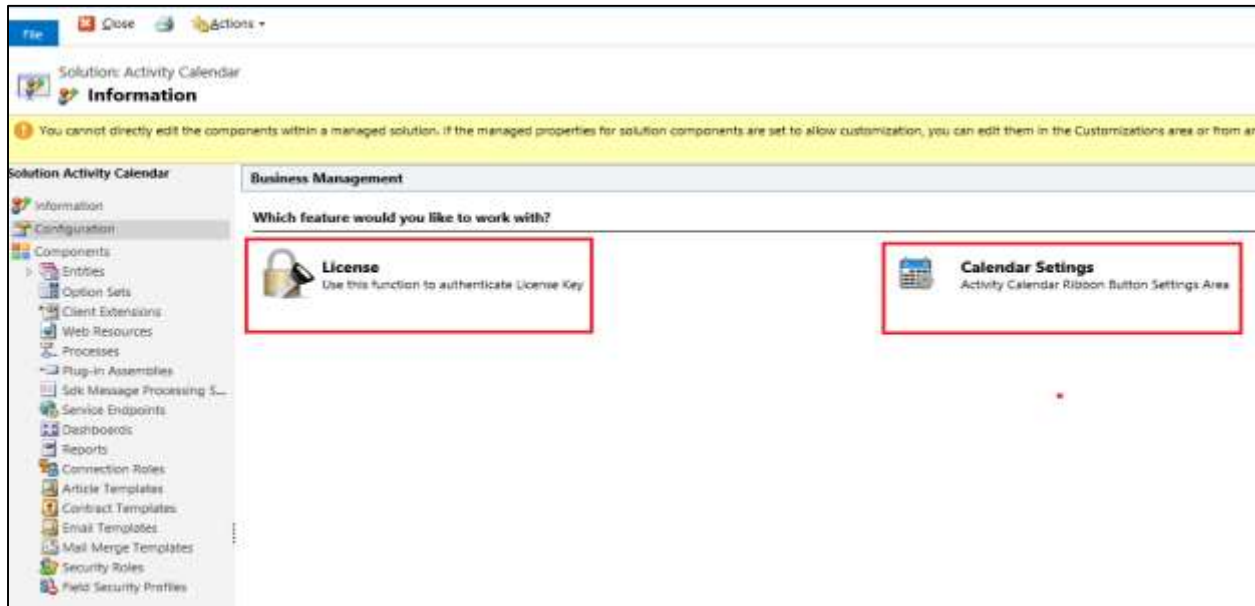
Figure 15: Select Entity

- Initially you will have two boxes displayed showing Selected Entities and Existed Entities

- Select Entities as shown above (example Campaign)

- Select Form or Homepage or Sub grid or all of them as per your choice and need to get display the Ribbon button.

- Click on Add, to move the Entity to Existed Entities.

Figure 16: Showing Entities for the Selected Account

- Now after selecting Entities (example Account) from the Existed Entity as shown above
- Click on Get Relation Button placed under the Existed Entities box.
- All the Relations entities pertaining to the Entity (Account) will be displayed in the Third box as shown above

Figure 17: Showing Relation Entities for the Selected

- Select the Relation entities as shown above (example Lead)
- You can select one or more entities from this
- All the related Attributes for the Lead and Account are displayed in the fourth box as shown above.
- Select the Attributes from this box and click on save button.

- Also can check Multiple Attributes and Finally Click on SAVE button.

- On click a new pop up throws out a message "Records Updated with Relation Data"... Click on Ok

Record Updated With Relation Data

OK
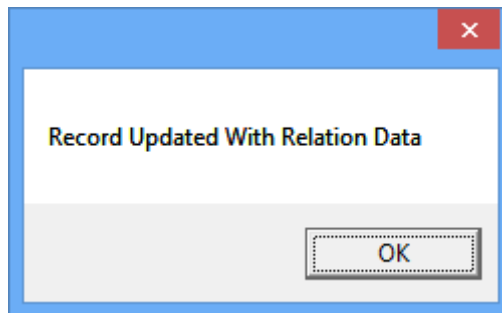
- Go Back to Main CRM

Note: The top right corner of the CRM screen shows the following icons when Activity Calendar is selected

 - This image indicates the refresh icon. Using this we can refresh the Activity calendar**.**

 - This image indicates the Full screen functionality. By clicking on this button Activity calendar functionality available in full screen mode. (It has toggle function)

(**Note:** Most of the screen shown below are captured in Full screen mode for easy understanding)

 Today will display the current day and arrows indicates that backward and forward dates for easy navigation.

Activity Calendar Functionality

Activity Calendar is a Microsoft Dynamics CRM 2013 is an add-on enhancement that allows organizations to be more joint effort interactive participation by allowing users to view Activities in the CRM calendar of multiple users within their organization.

- Click on Account, Select any account and also select the more button (…) to show or display Activity Calendar Button.
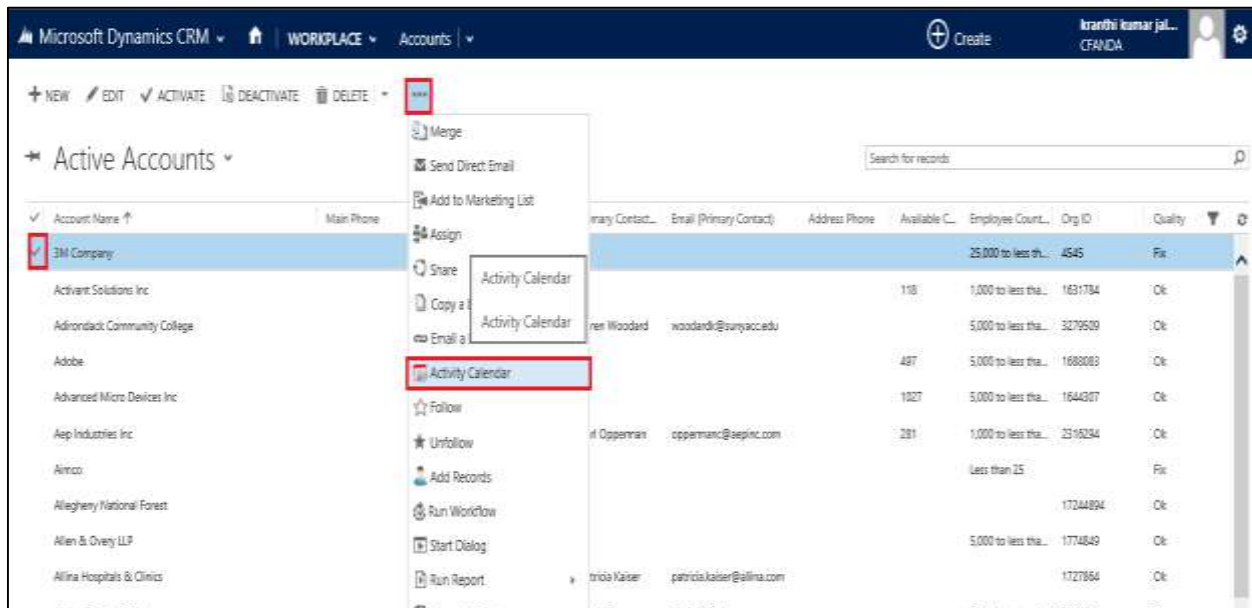
Figure 18: CRM Account View with Activity Calendar button

OR

- Click on Account, Open the Account form and also select the more button (…) to show or display Activity Calendar Button.
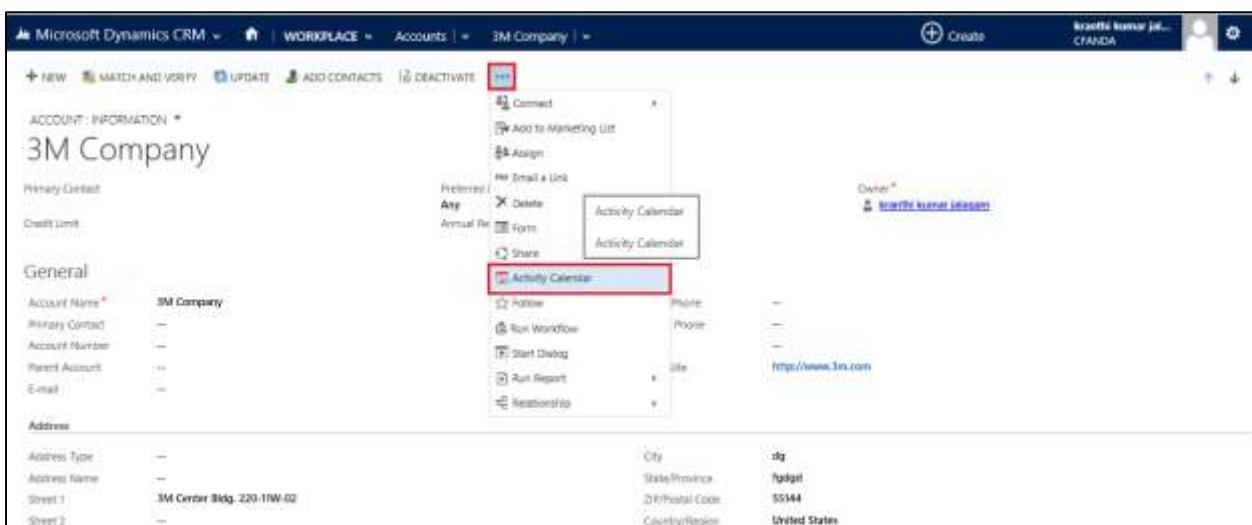
Figure 19: CRM form view with Activity Calendar Button

How to Create a New Activity

To Create a New Activity just Right click on the date or where ever it is required

- On selecting Create Activity, activity form is opened. Input the required data and save the form, it in turn reflects in the Activity Calendar.
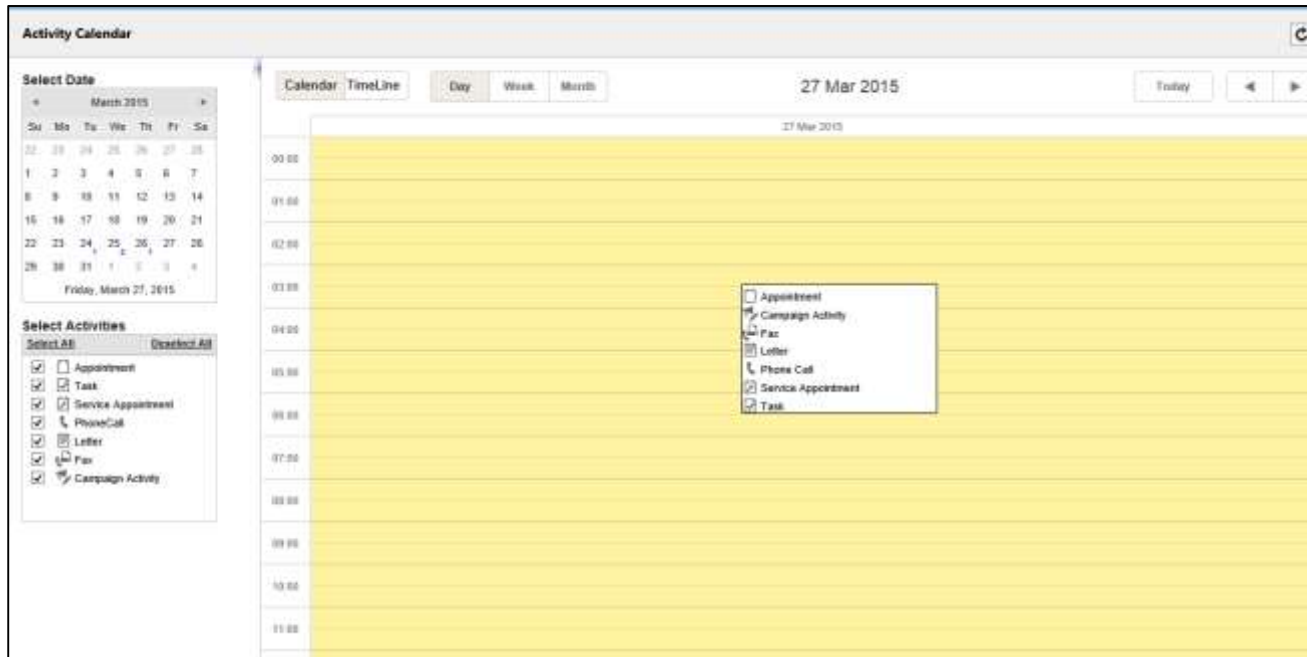
Figure 20: Create Activity

- The drop down list has all the Activities such as Appointment, Task, Service Appointment, Phone Call, Letter, Fax and Campaign Activity as shown below
- To View the calendar to your choice first Select the Calendar date, followed by selecting the Activities as shown below
- Either you can select one or more users or Select All or even Deselect all for easier selecting options. (as shown below)
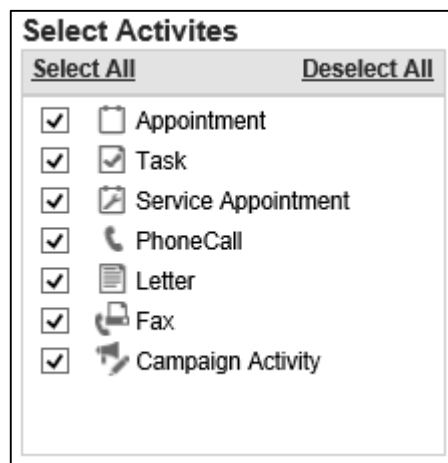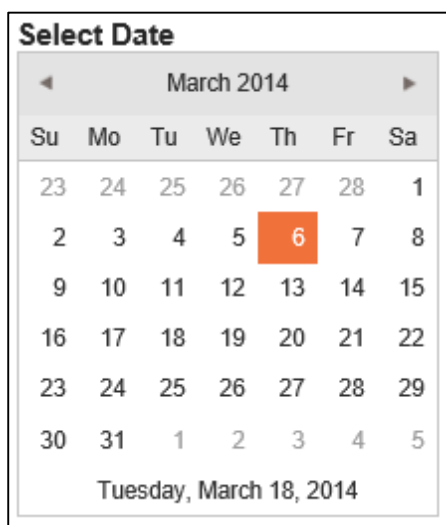
Calendar View – Day
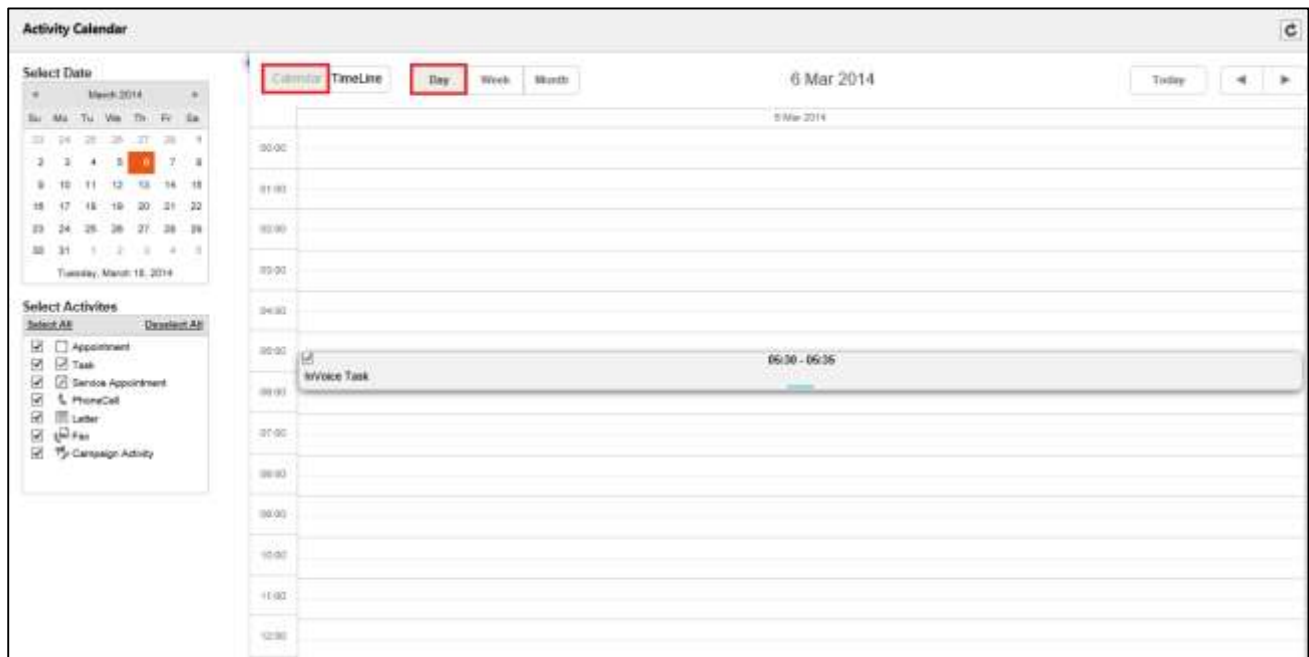
Figure 21: Calendar view - CRM

- The working pane has Date Calendar on top, and Activities list at the bottom.
- The right side of screen displays the Calendar with activities details for the day
- To create a new Activity, double click on the date
- New pop up window opens as shown below

Calendar View – Week
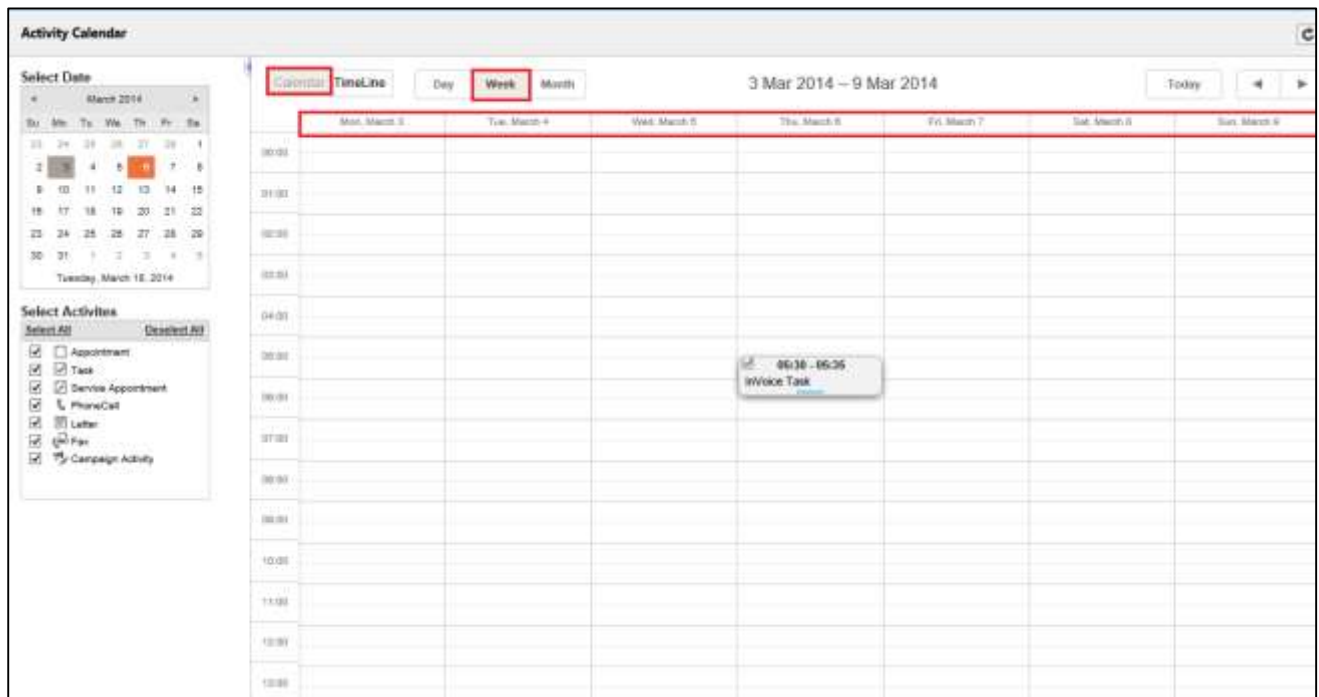
Figure 22: Calendar View – Week

- Here in this Weekly wise calendar, one can view always for the selected week from Monday to Sunday.
- Adding Activity is similar operation as shown above.
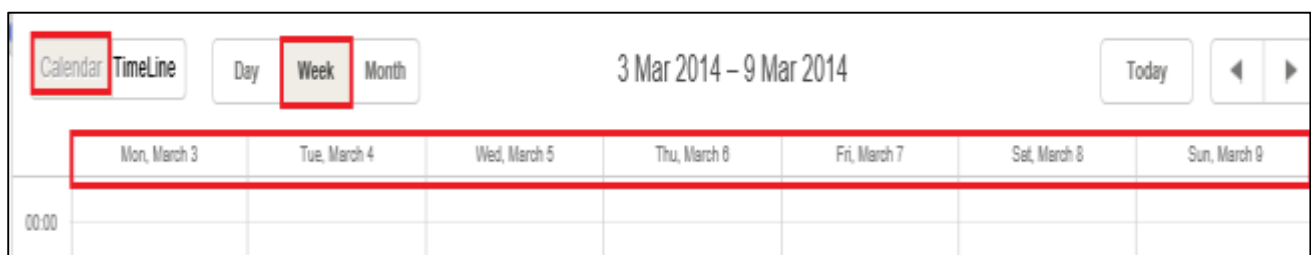
Figure 23: Calendar View – Week Enlarged

Calendar - Month
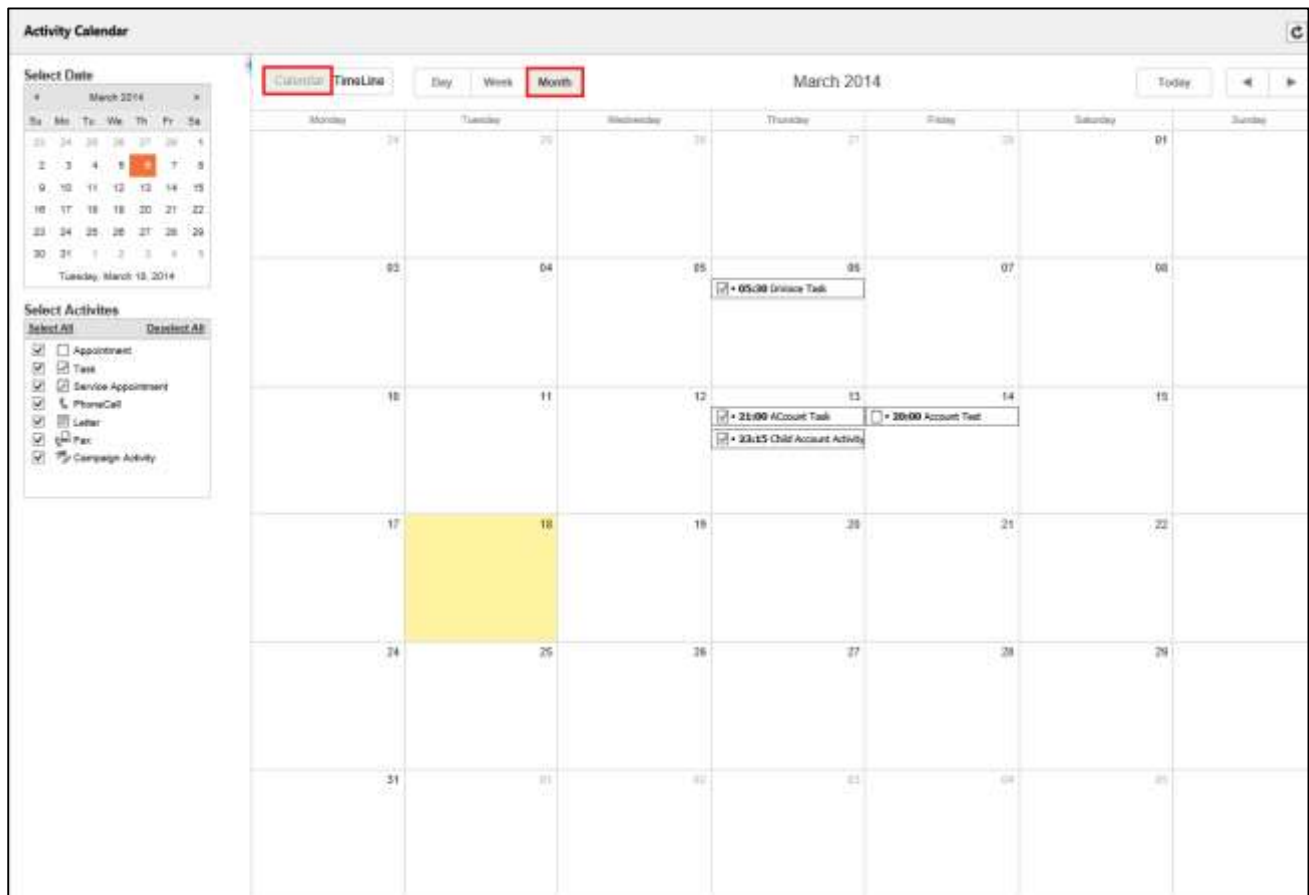
Figure 24: Calendar View - Month

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Time Line View – Day Wise (O Hrs. to 23 Hrs.)
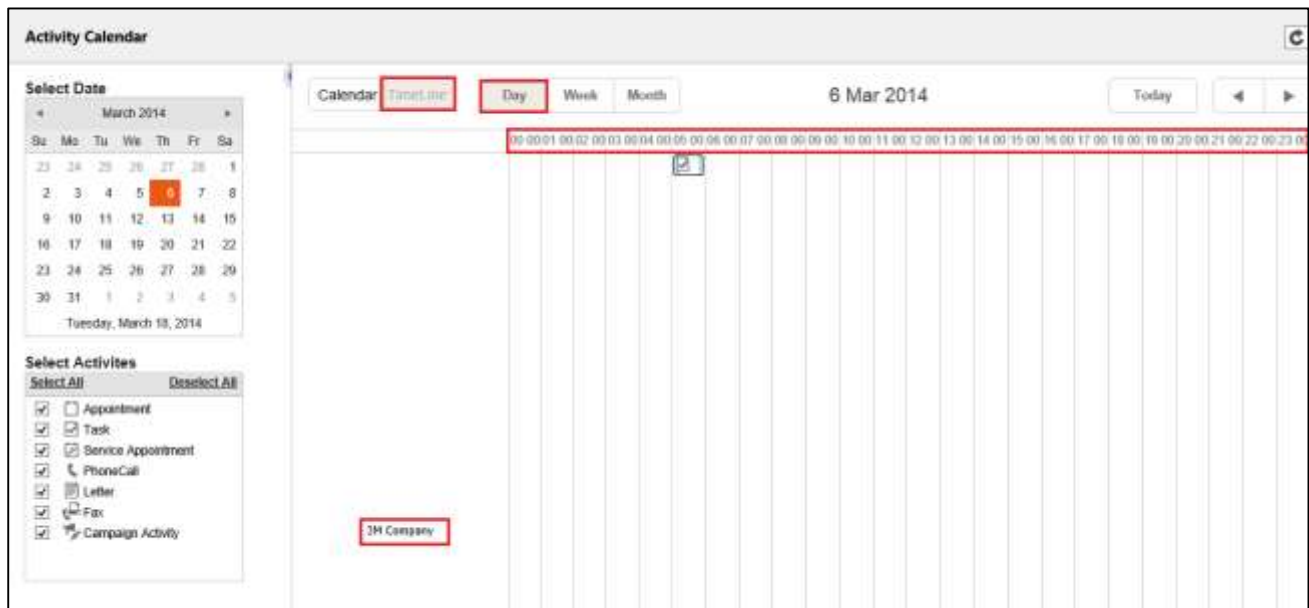
Figure 25: Time Line View Day (Hours) wise
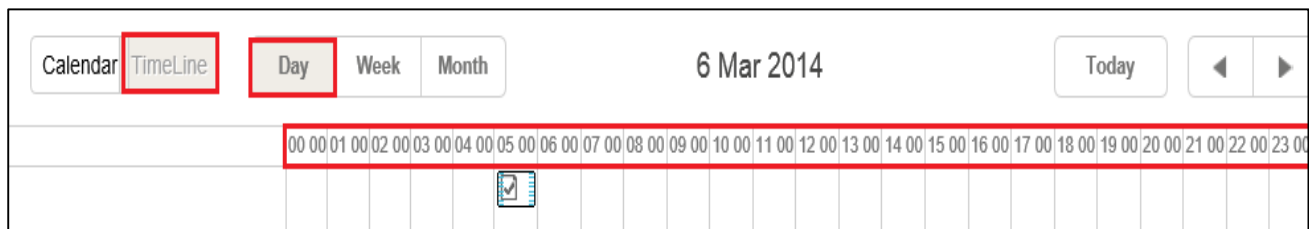
Figure 26: Time Line Hours View Enlarged

- In this Tile Line View you can view all the activities for the Selected Day on Hourly basis

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Time Line View – Week Wise (Mon - Sat.)
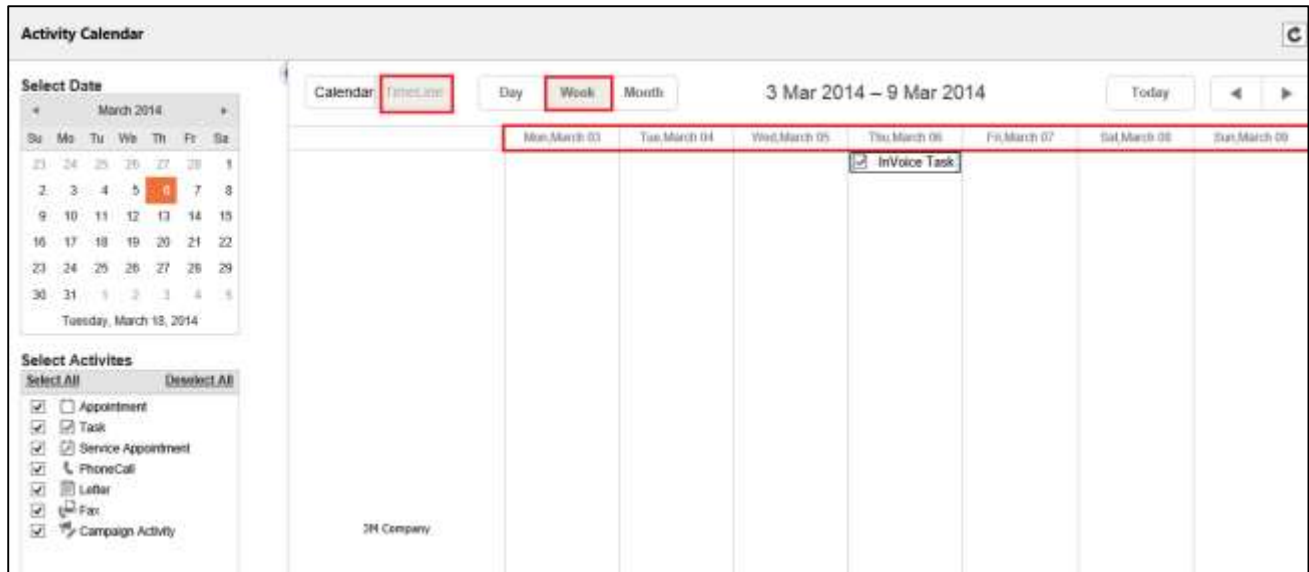
Figure 27: Time Line Week Day wise
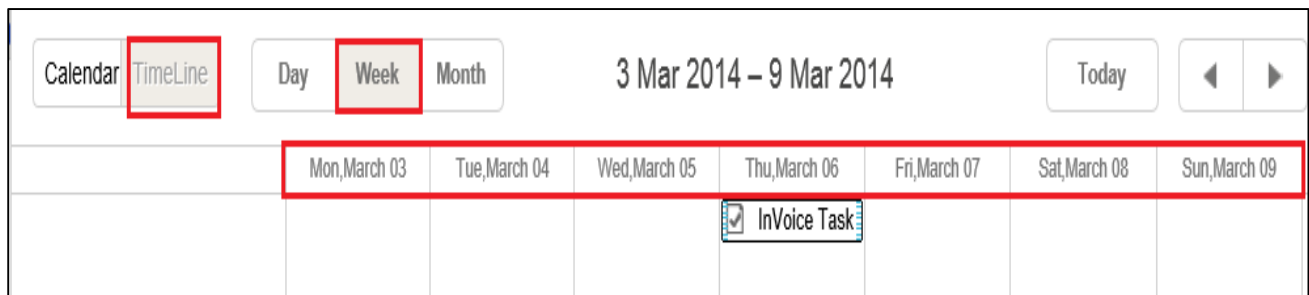
Figure 28: Time Line Week View Enlarged

- Weekly Calendar always displays for the selected week (i.e. from Monday to Saturday)

Time Line View – Month Wise
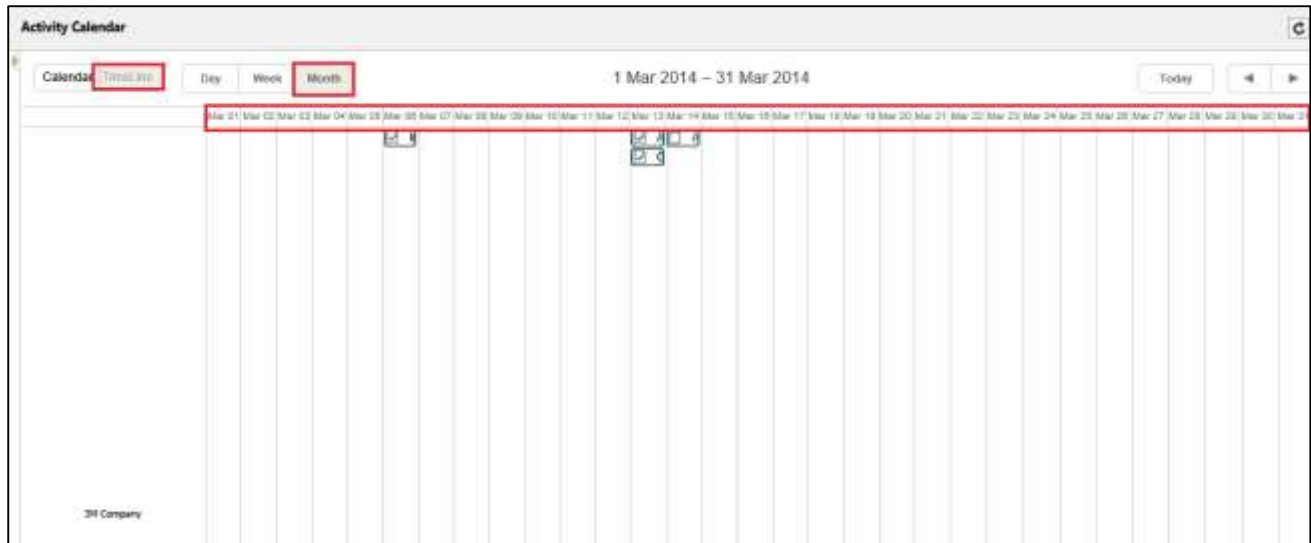
Figure 29: Time Line Monthly Vise Date wise

Figure 30: Time line view - Monthly Enlarged

- If selected Month and Time Line option, the Calendar is displayed for the selected moth showing all Dates from 1 to 30 or 31st

Important to Note

1. In any view of the calendar, user has the option to Select all Activities or Deselect all Activities or Select only few activities which are necessary to view

2. Apart from the regular view of the calendar user can also have Time Line view of calendar as shown above

3. User has option to Drag & drop any activity on the Calendar

4. Even in Time Line view user can change the Activity timings by dragging the icon on both the ends.

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Drag & Drop Activities

- User can Drag any the activites from one date to another or One time schedule to another.

- After the Activity is draged to another date or place as required, the system asks for confirmation of the same as shown below - Click OK to confirm and proceeed further
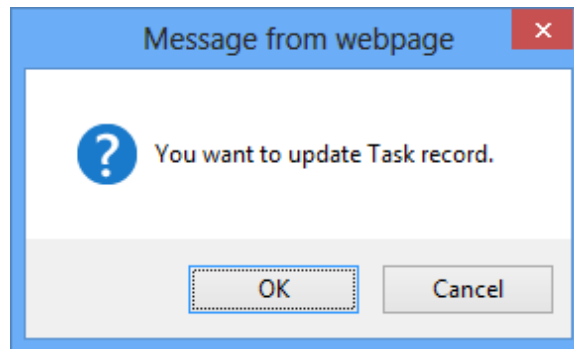
Figure 31: Drag & Drop - Message

Uninstallation Process

- To uninstall Activity Calendar, Navigation is Settings → Solutions → Select the check box of Activity Calendar then click on Delete as shown below.
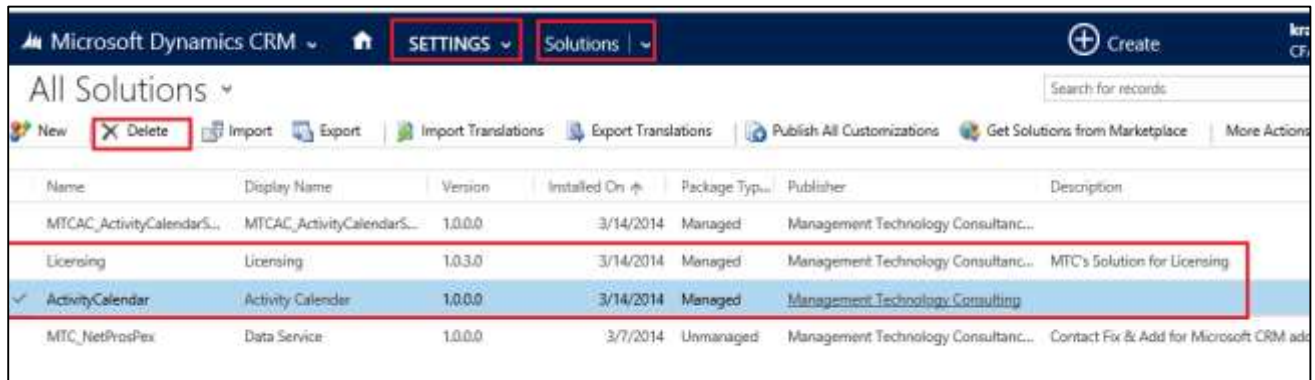
Figure 32 : Deleting Activity Calendar Solution

- Click on OK to delete the solution from CRM. The solution will be deleted
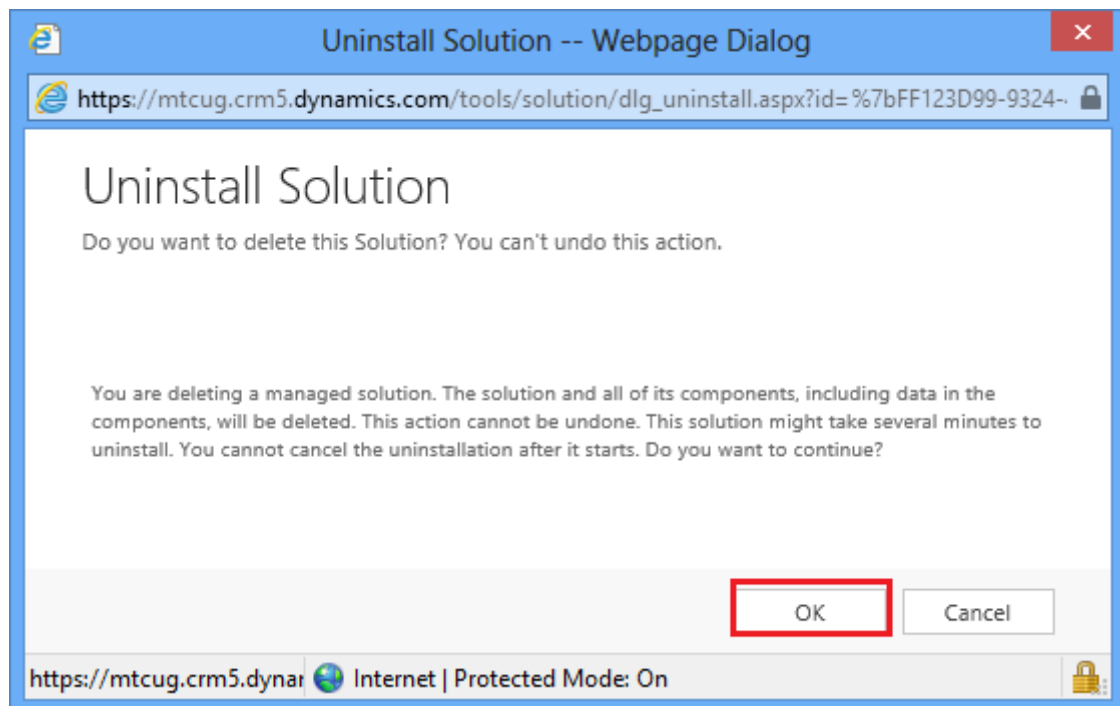
Figure 33 : Uninstall Solution

- Follow the above process to delete the Licensing solution also.

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Availability and hours of operation: Monday to Friday

USA PST 323-851-5008 - 8:00 AM to 6:00 PM

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USA Headquarters:

Management Technologies Consulting, LLC

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