



Microsoft Dynamics CRM / XRM Platform



User Guide



CRM Versions Supported : CRM 2013, CRM 2015 & Online

My Calendar is a Microsoft Dynamics CRM 2013/CRM 2015 is an add-on enhancement that allows CRM users Helps user to Organizes day to day activities, prioritize tasks, Execute in highly professional manner to enhance his and organizational reputation. Calendaring is to schedule everything in the business.

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License Key

- To install My 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

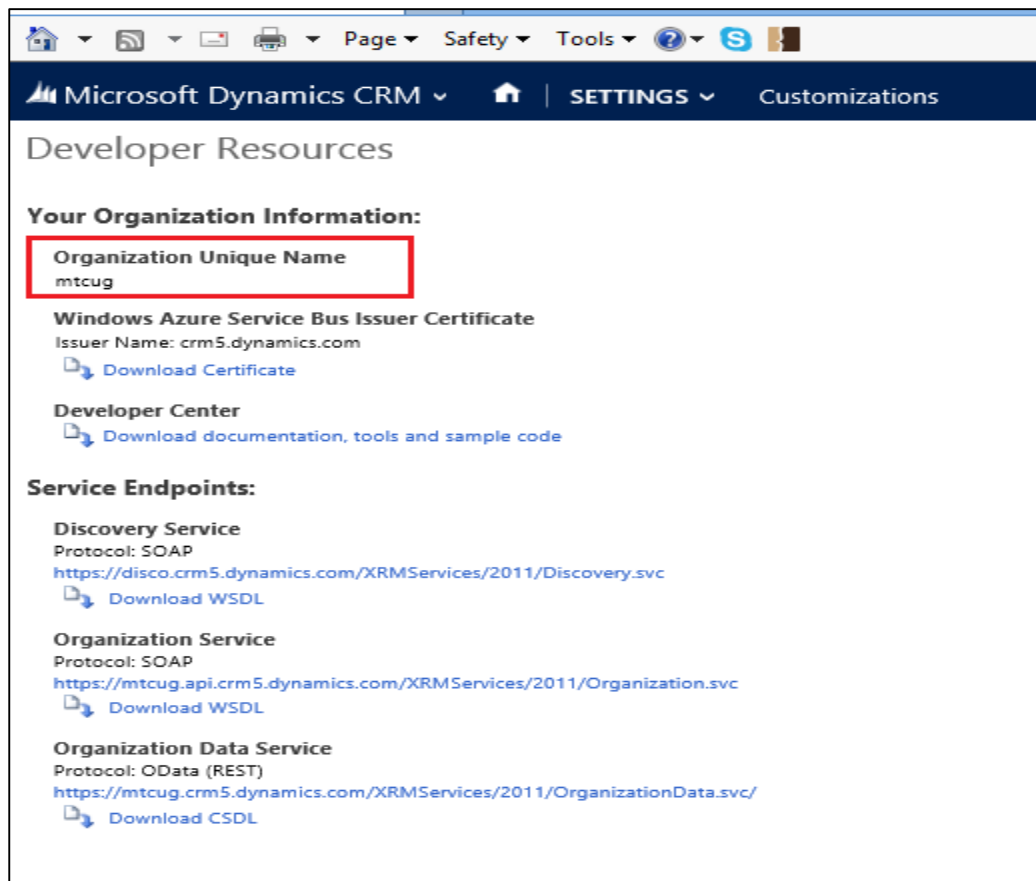


Figure 2 : Organization Unique Name

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

Installation Process

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

STEP 1:

- Go to <http://www.mtccrm.com/My.aspx> click on Download to get Solution.
- On Downloading you will get **MyCalendar_2_0_0_1.zip** (ZIP file).
- Extract the files from the downloaded folder. You will get two WINRAR ZIP files



MyCalendar_2_0_0_1_managed.zip



Licensing_1_0_3_0_managed.zip

STEP 2:

- Open your CRM click on **settings→solution→import** it will open import Solution window.

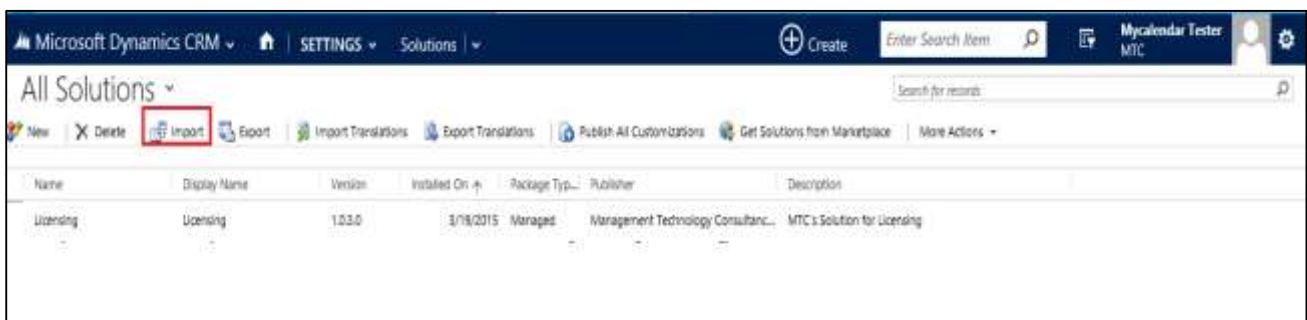


Figure 3: Import Solution

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.
- **Initially Import Licensing solution first and later the My calendar solution**

Installing Licensing Solution

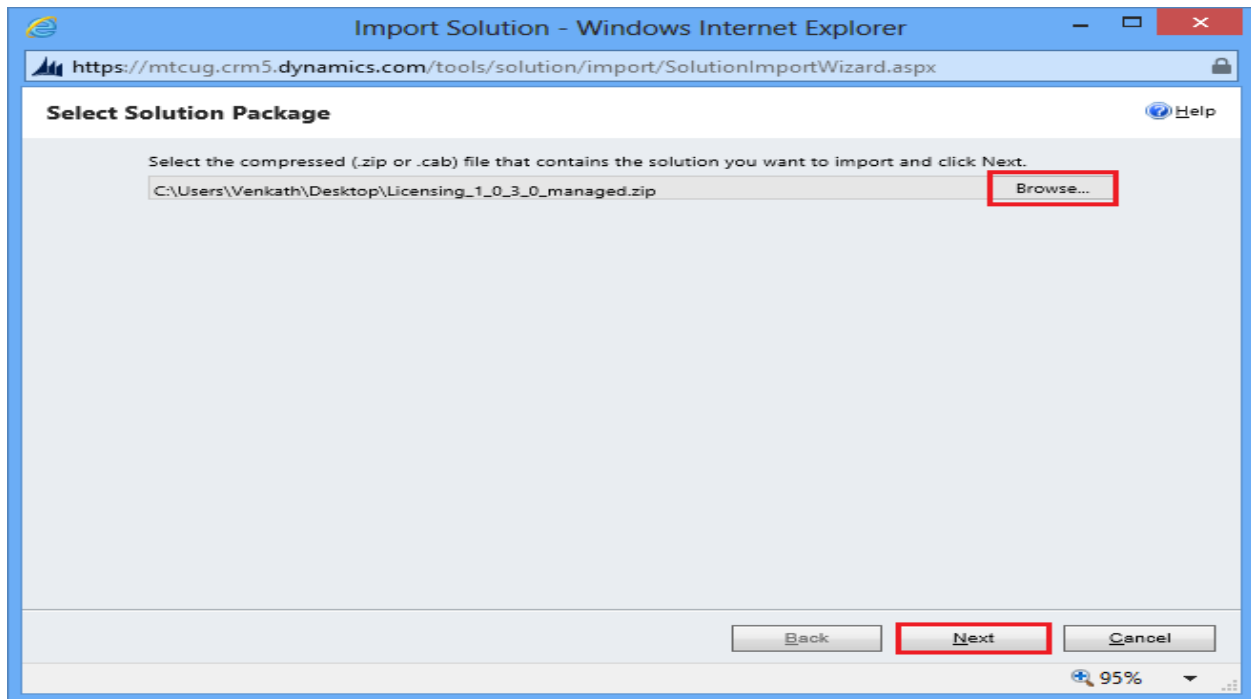


Figure 4 : Select Solution Package

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

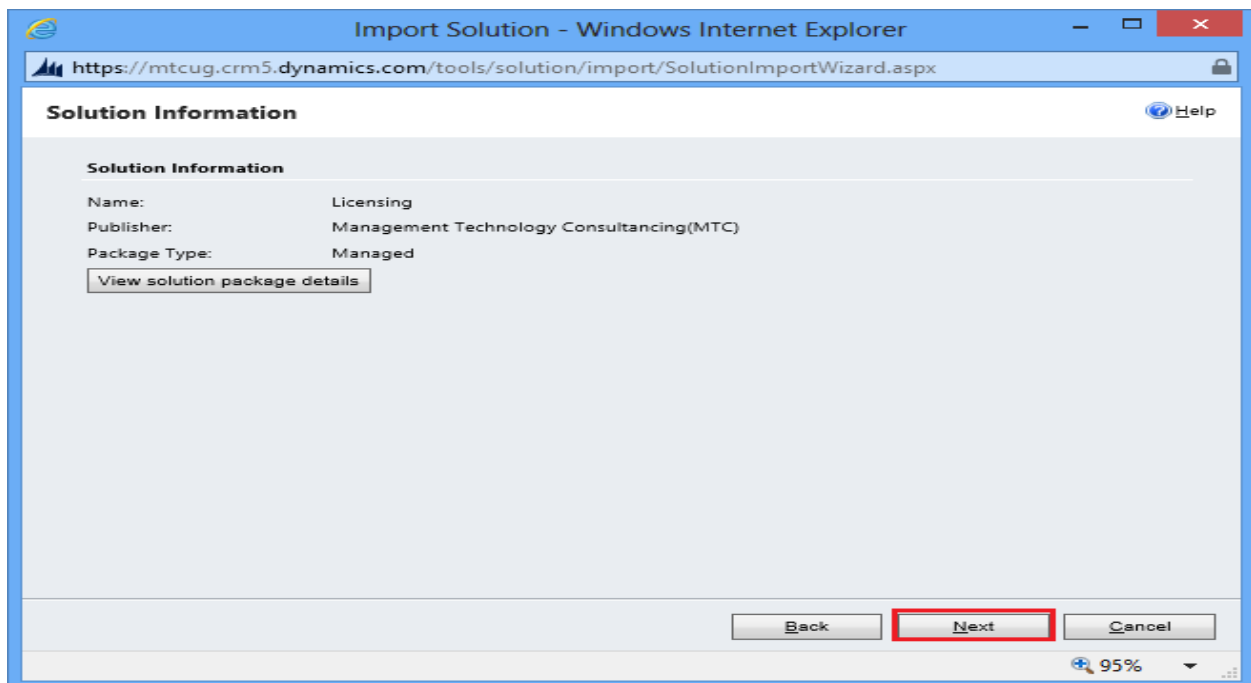


Figure 5: Importing Options window

- Click on Next to proceed

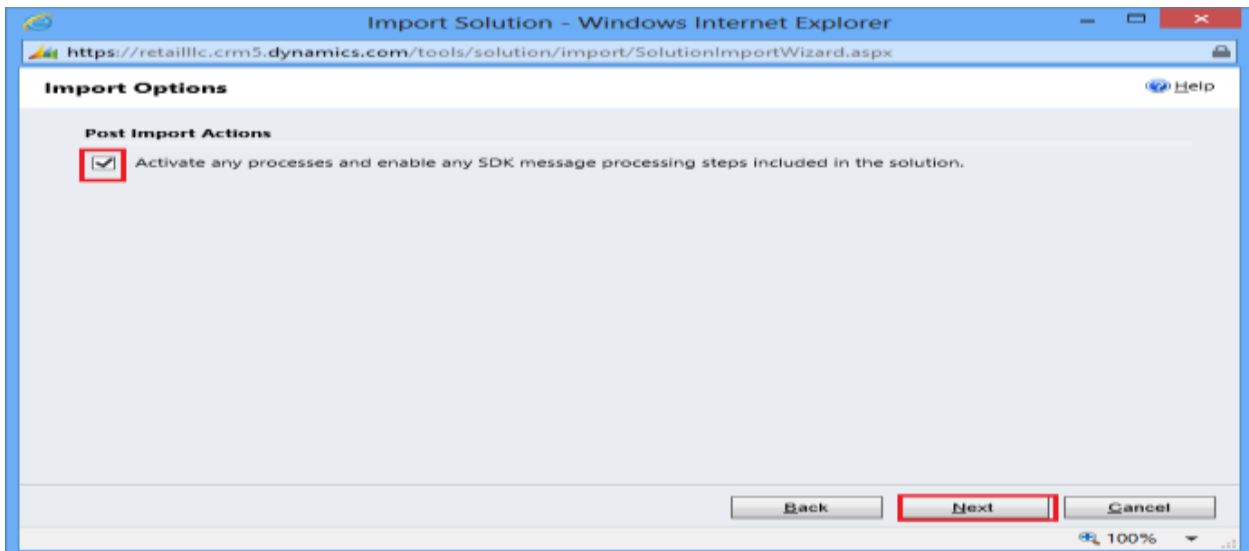


Figure 6: Import Option

- Click on Next to proceed

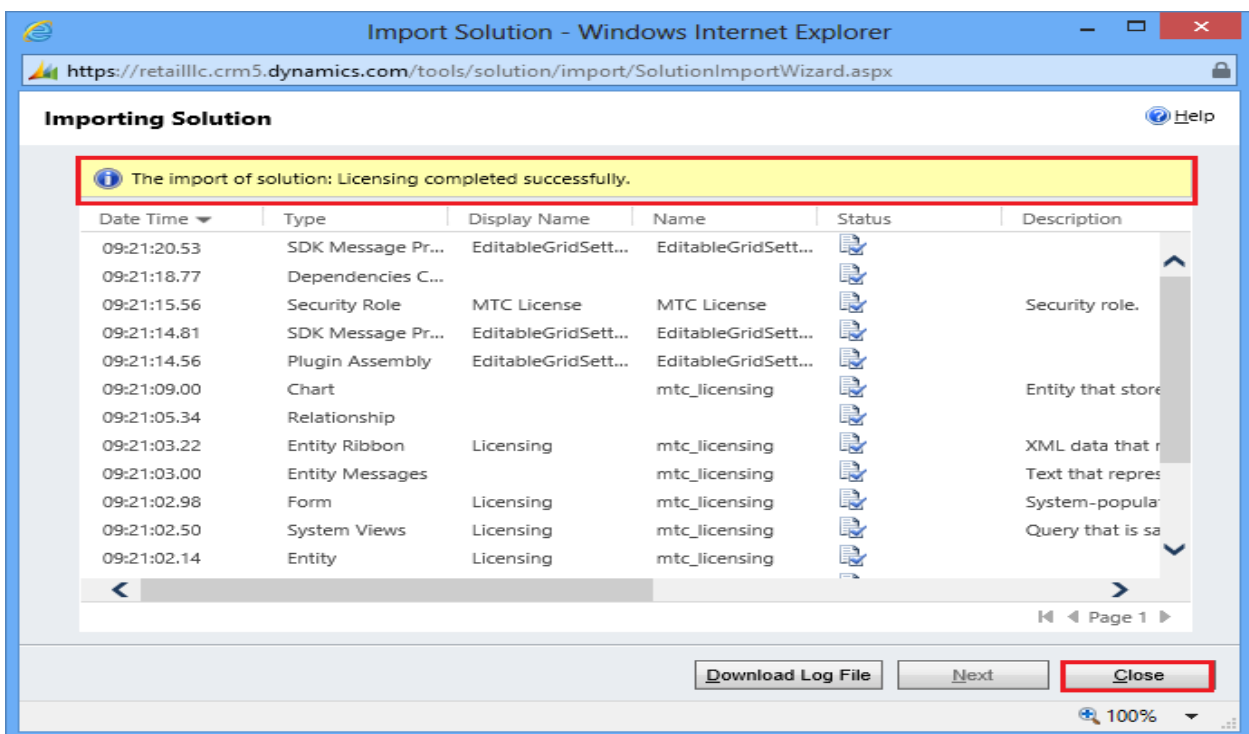


Figure 7: Importing Solution – Licensing

- Click on Close after successful completion message is displayed.

Installing My Calendar Solution

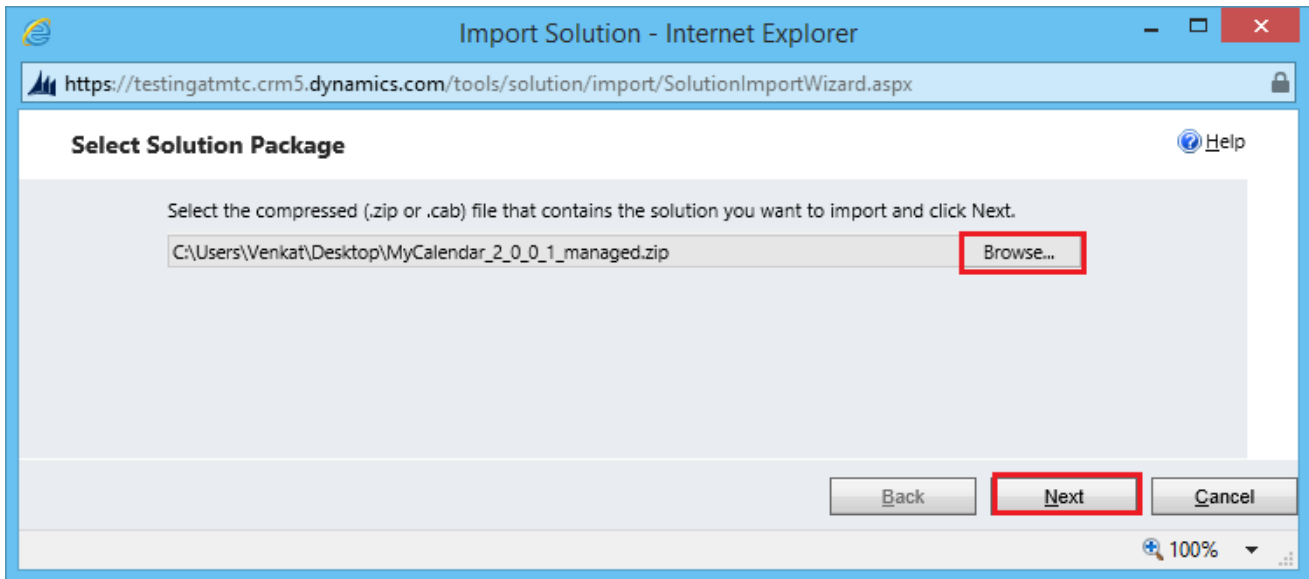


Figure 8: Select Solution Package

- Click Next to continue

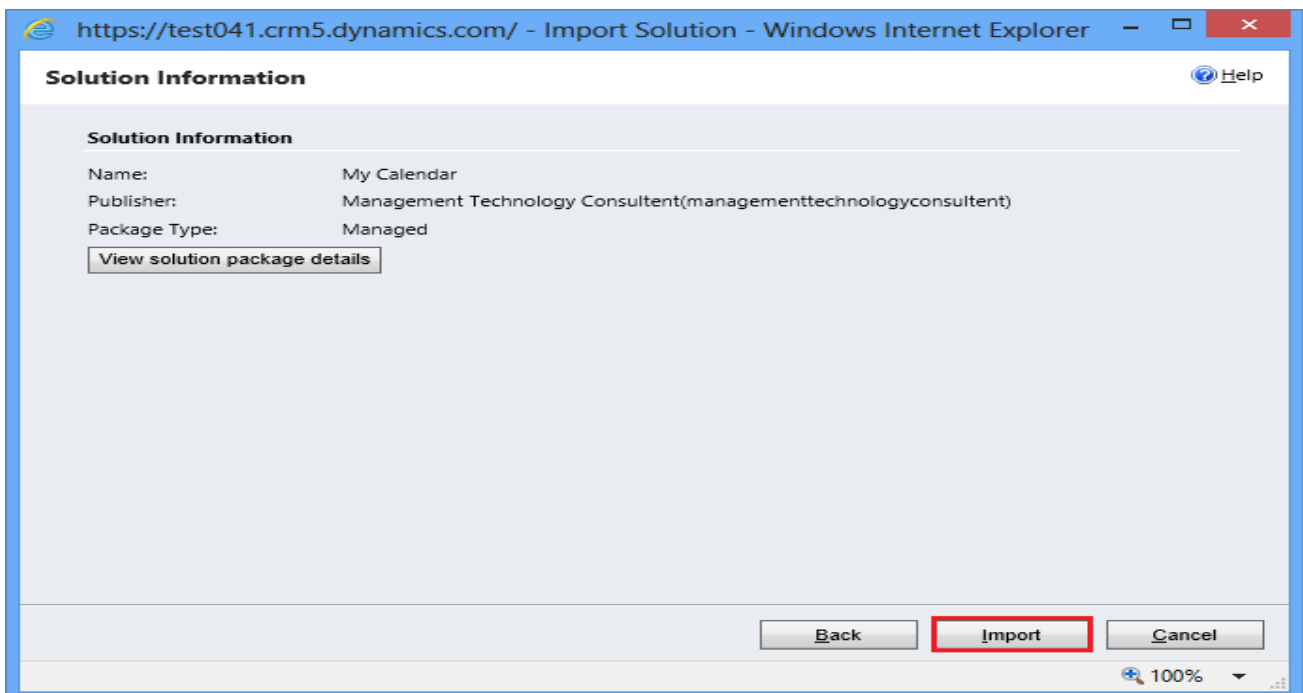


Figure 9: Solution Information

- 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.

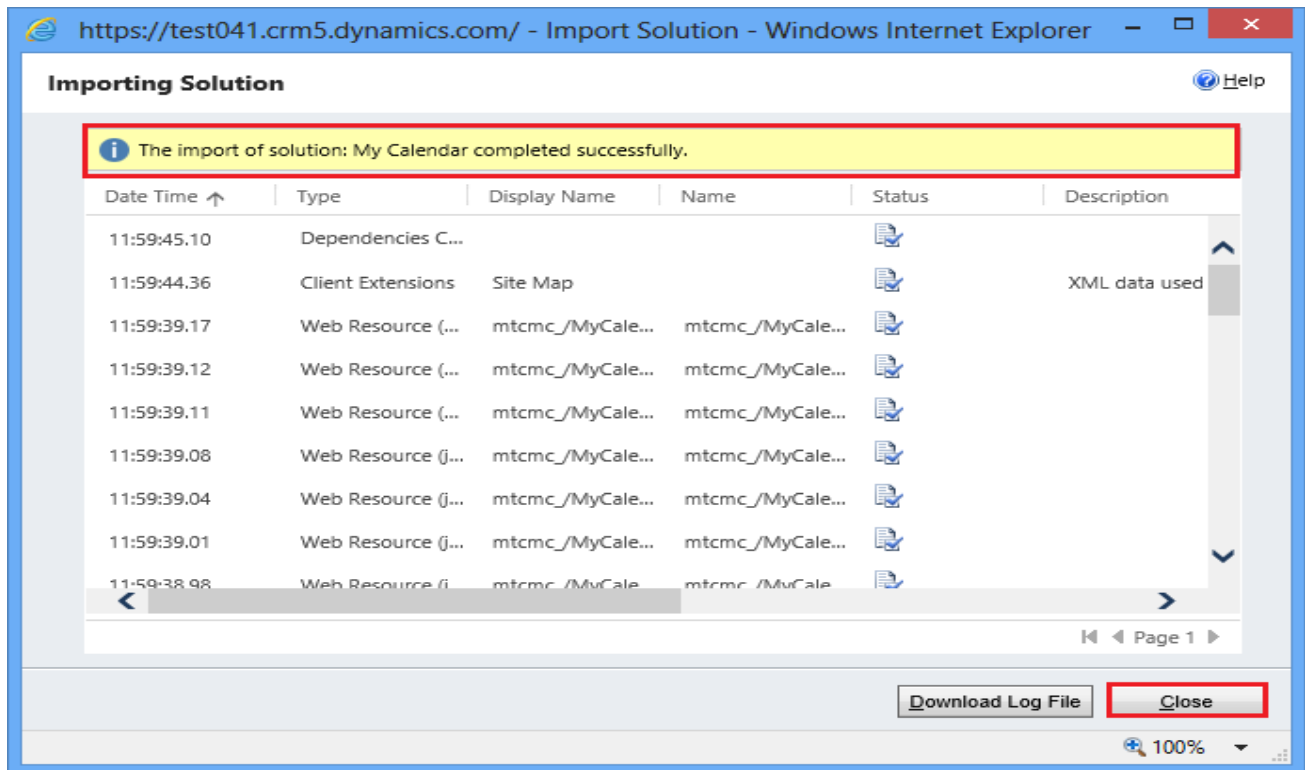


Figure 10: Importing Solution

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

My Calendar Functionality

- Only User who logs in to CRM can Use this My Calendar
- Single or multiple user facility are available with Other MTC Calendaring User Interface Products
- Open CRM Go to **Service-> My Calendar**

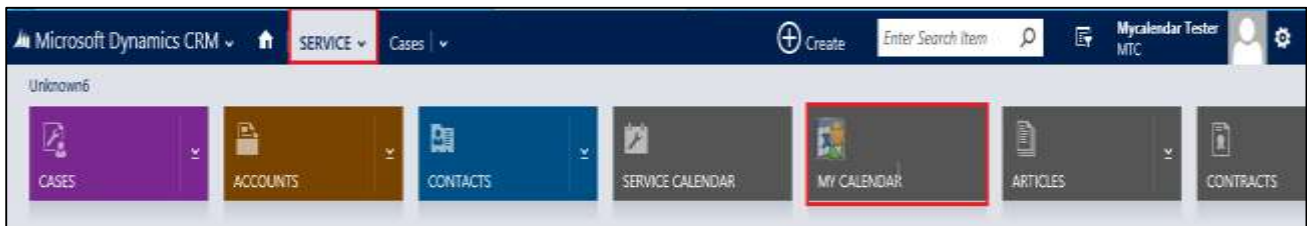


Figure 12: CRM 2013 Ribbon

Select Activities

Select Single or Multiple Activities such as

- Appointment
- Task
- Service Appointment
- Phone Call
- Letter
- Fax
- Campaign Activity
- The working pane has Date Calendar on top, and Activities list at the bottom. (left Side)
- The right side of screen displays the Calendar with activities details
- Only the users who logs in the CRM are listed in this list (Only One User)
- To move the Activity just Drag and Drop it in the required place

To Create a New Activity just Right click on the Calendar Grid on the time or Date that you wish to create a activity

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

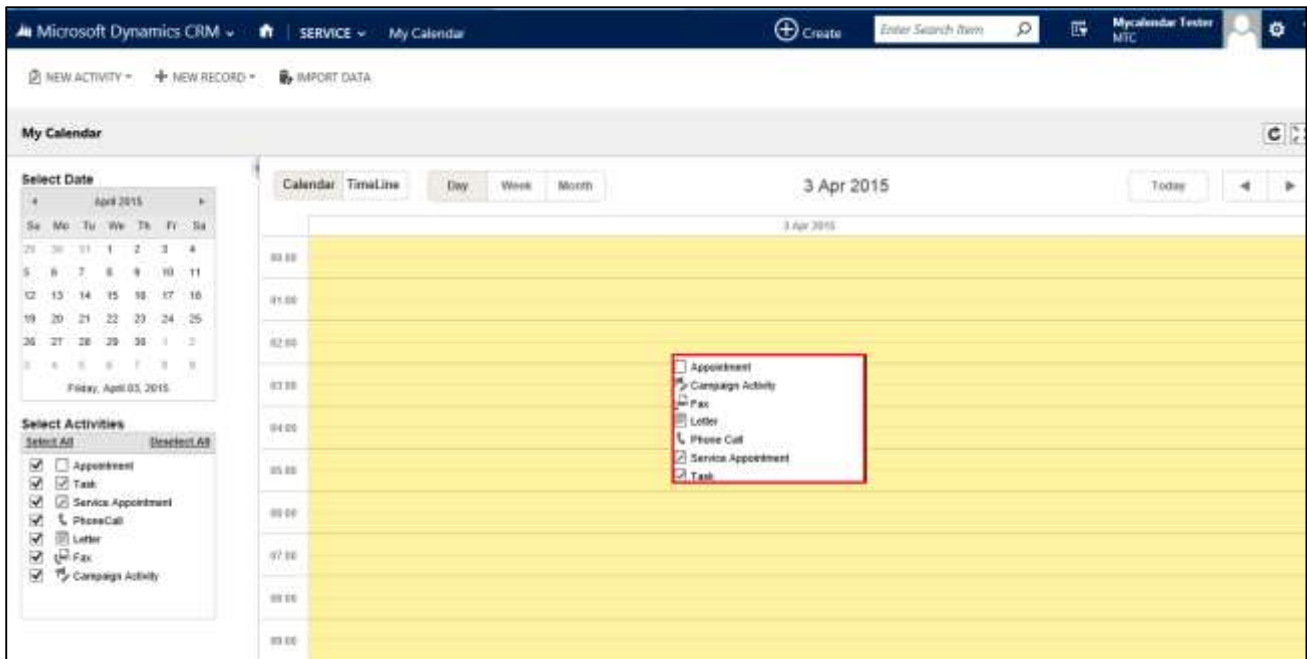


Figure 13: Create Activity

- The drop down list has all the Activities such as Appointment, Task, Service Appointment, Phone Call, Letter, Fax and Campaign Activity as shown.
- To View the calendar to your choice first Select the Calendar date, and selecting the Activities as shown

Note: The top right corner of the CRM screen shows the following icons



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



- This image indicates the Full screen functionality. By clicking on this button My calendar functionality available in full screen mode.

(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.



To expand the Calendar grid to a full page view. It's a toggle key to et back to original screen.

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 various Time Line views of calendar as shown above
3. User has option to Drag & drop any activity on the Calendar
4. User can opt to view Full Screen mode also by selecting  or Hide the Left side of the working screen by clicking on  toggle.
5. Even in Time Line view user can change the Activity timings by dragging the icon on both the ends.

Select Date						
March 2015						
Su	Mo	Tu	We	Th	Fr	Sa
22	23	24	25	26	27	28
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
Friday, April 03, 2015						

This Calendar view is being displayed in every format in this My Calendar.

You can notice that from Dates 16 to 21 there are base figures mentioned as 2, 0, 3, 6, 7, 6, etc. These are nothing but a consolidated figure showing the user that those many active or open activities are on to his credit for that particular day.

For Example on 19 March he has 6 Activities and On 20 March he has 7 activities.

Drag & Drop Activities

- User can Drag any the activites from one date to another or One time schedule to another.
- Darg and Drop facility is only for the Activities which are Active in status. This means Activities which are in completed stage can not have this facility.
- After the Activity is dragged to another date or place as required, the system asks for confirmation of the same as shown below - Click OK to confirm and proceed further

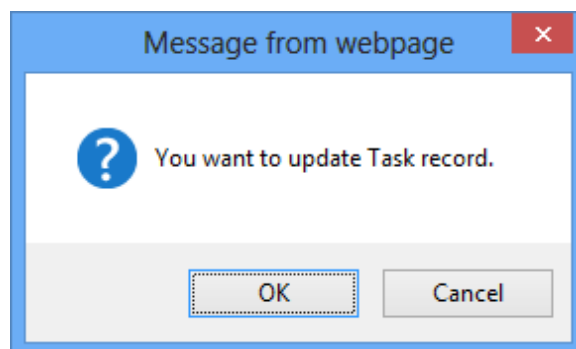


Figure 14: Drag & Drop – Message

Calendar TimeLine							March 2015		Today	◀	▶
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday					
• 05:30 Delivery received	• 05:30 Call back to unde	• 05:30 Call back to unde	• 01:30 Product service	✓ • 07:40 Ask Regional Mar	• 01:30 Check with custo	✓ • 01:30 Customer not					
• 12:30 Maintenance req	• 05:30 Call back to unde	• 15:30 Mailed an interes	• 05:30 Customer reques	✓ • 11:30 new task	✓ • 03:30 Pain admitted by	✓ • 07:30 Schedule an a					
• 14:30 Customer wants	• 05:30 Call back to unde	• 17:30 Verbal approval	• 14:30 Information prov	• 13:30 Information prov	• 05:30 Ensure item is di	✓ • 07:30 Schedule an a					
• 15:30 Item defective o	• 05:30 Call back to unde	• 17:30 Check the deliver	• 15:30 availability of Pre	• 15:30 Evaluation Plan a	• 15:30 Discuss high leve	✓ • 07:30 Check whethe					
✓ • 15:30 Schedule an app	• 15:30 Evaluation Plan a	• 19:30 Product related e	• 15:30 Call the customer	• 15:30 Call back to unde	✓ • 15:30 Evaluation plan u	• 15:30 Sponsor agree					
• 17:30 Information on t	• 15:30 Information rep	• 19:30 Maintenance req	• 15:30 Call back to unde	• 15:30 Call back to unde	• 15:30 guidelines for the	• 15:30 Discuss new o					
• 17:30 Product related	• 15:30 Information prov	• 21:30 More details abo	• 17:30 Feedback on the	✓ • 17:30 Escalate to the de	• 15:30 Review of operit	✓ • 15:30 Pre-proposal r					
	• 17:30 Likes some of ou		• 19:30 Maintenance info	• 19:30 Very likely will o	✓ • 17:30 Escalate to the de						
	• 17:30 Feedback on the				✓ • 17:30 Information on t						
	• 19:30 Ask delivery mar				✓ • 19:30 Sponsor has a bu						
22	23	24	25	26	27	28					
✓ • 15:30 Access to power	• 05:30 Call back for resi	• 14:30 test		✓ • 15:30 Evaluation Plan p							
• 15:30 Likes our new pr	✓ • 15:30 Agree to above it	✓ • 15:30 Proposal Issue, C									
✓ • 15:30 Asked for busine	• 15:30 Will be ordering	• 15:30 Discuss new opp									
	✓ • 17:30 Check sales liter										
29	30	31	01	02	03	04					

- Activities displayed in Color GREEN are an indication that the activity is completed.
- Activities in WHITE color indicates that are still open

Calendar View for activities assigned for more than one date

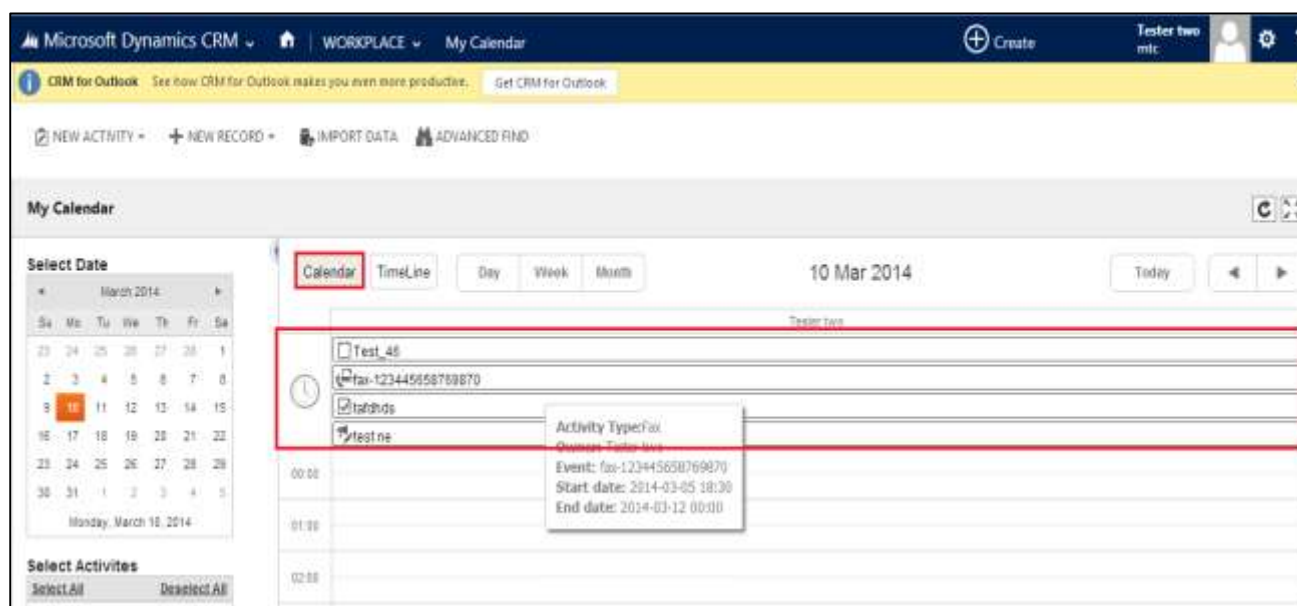


Figure 15: Activities showing for more than One day

- All the Activities which are assigned for more than One day are displayed in the Calendar day view. (For Example Activity Type FAX has been assigned from 5th March 2014 to 12th March 2014 in the above screen shot)Calendar View - Monthly

Calendar view monthly - Selected Activities

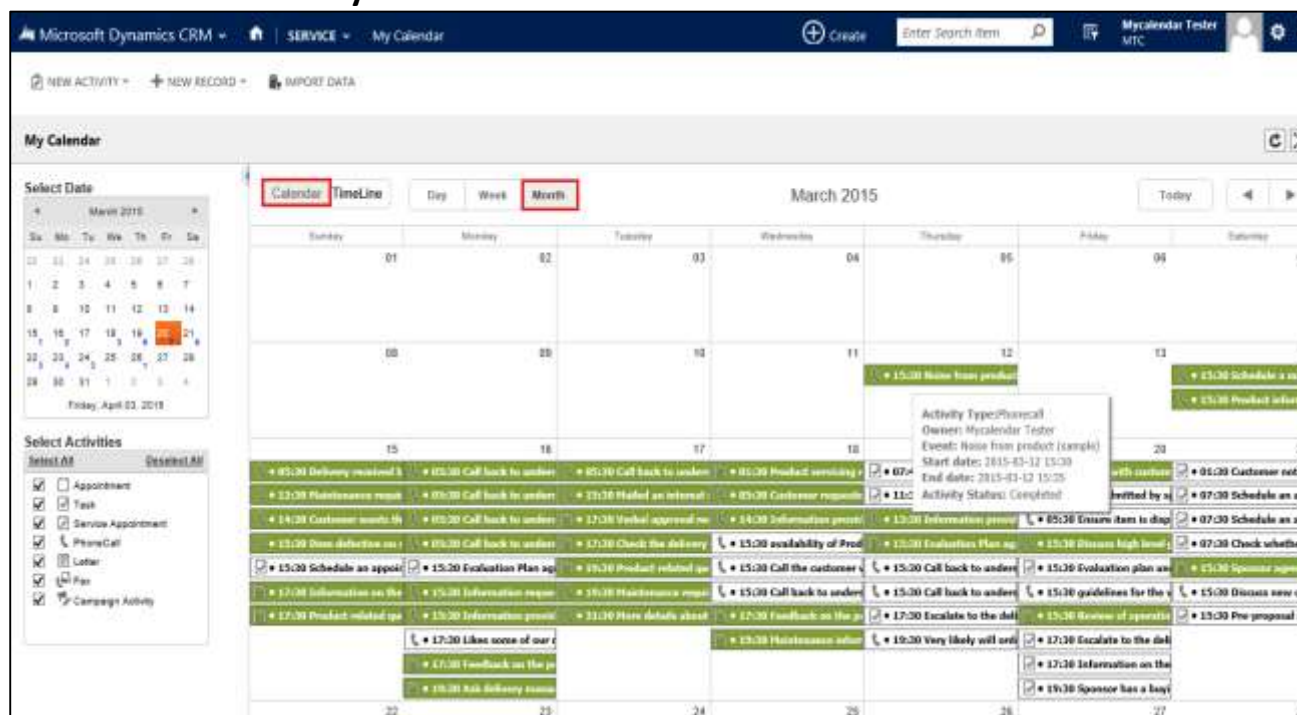


Figure 16: Calendar View - Monthly

- Monthly details of all Activities are displayed for a Single User

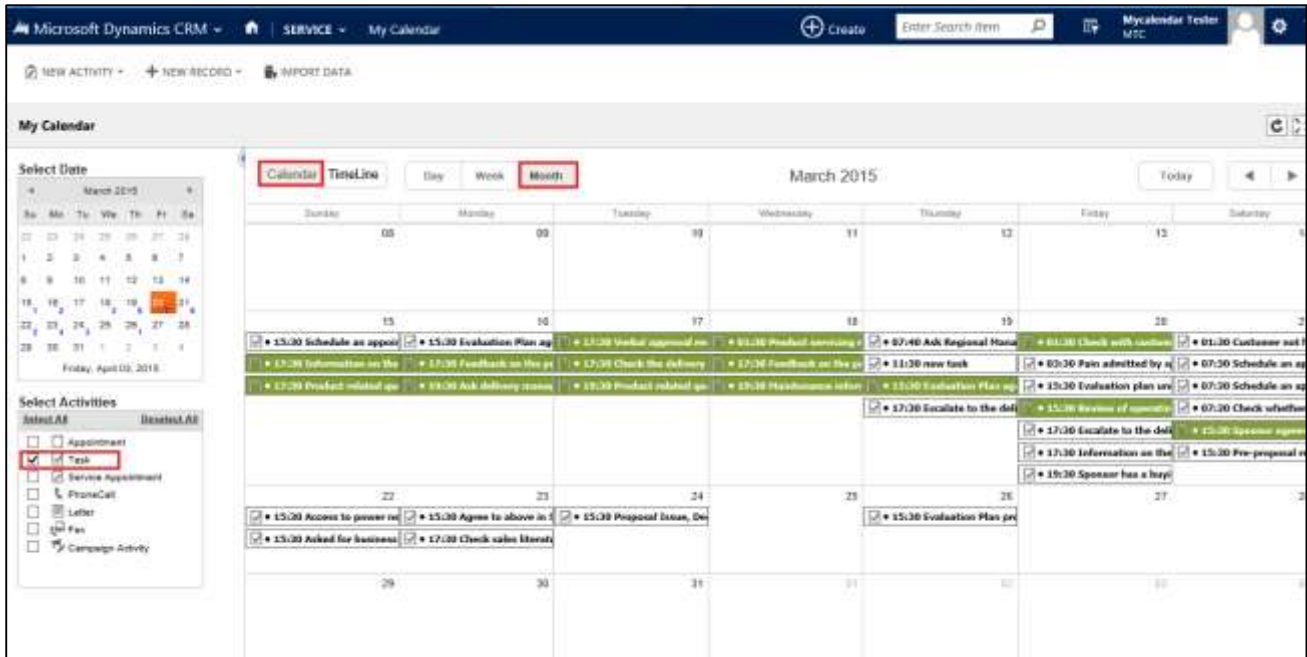


Figure 17: Calendar view monthly - Selected Activities

- The Calendar can be viewed as Day, Week, Month, User Wise and Time Line – select the required as shown below

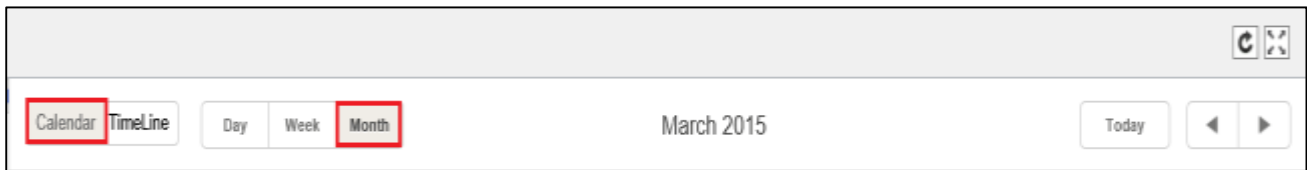


Figure 18: Select Calendar - Day, Week, Month, User Wise or Time Line

Calendar view - Week Wise

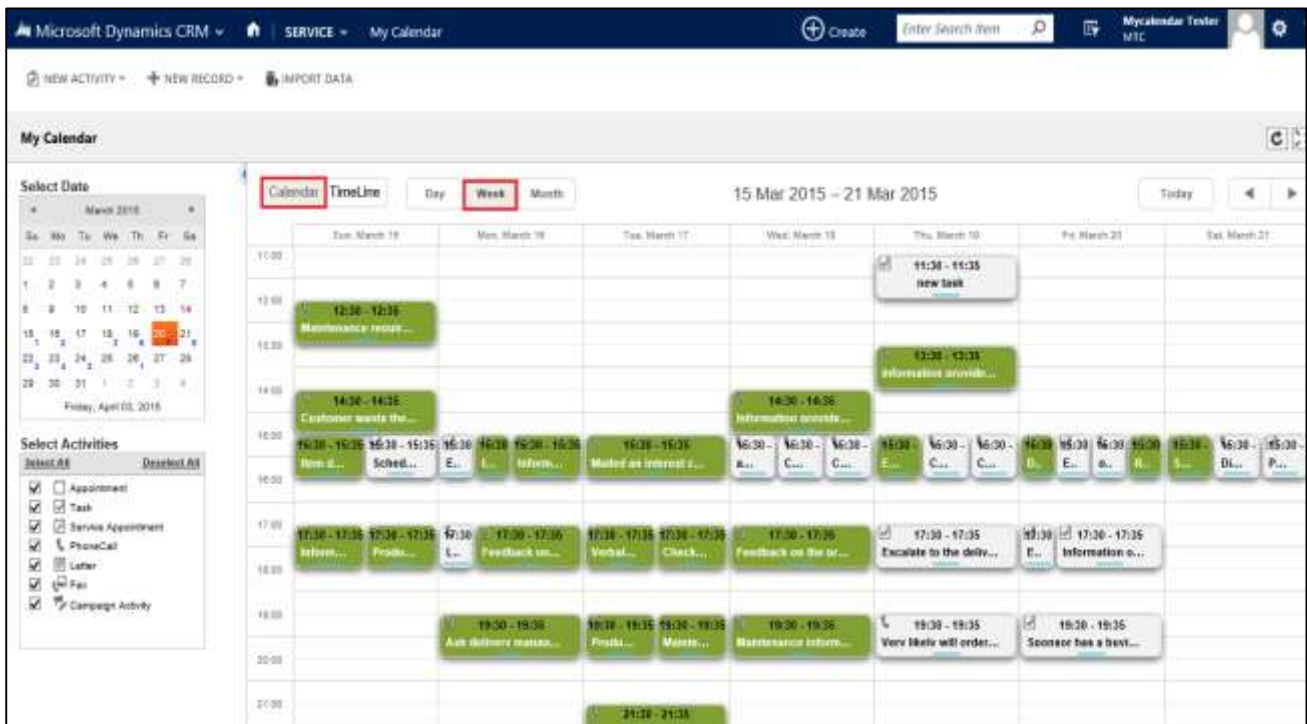
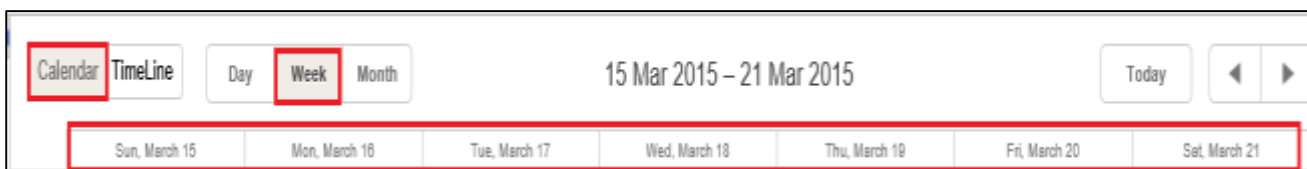


Figure 19: Calendar view - Week Wise

- Here in this Weekly wise calendar, one can view always for the selected week from Monday to Sunday.
- The Top of the screen has the Time Line details for all the Task for the Week, user has the facility to scroll up or down to view the record details.
- User can also select Calendar view with Single Activity or Multiple Activities to view Weekly calendar



Calendar View - Day wise (0 Hrs. to 23 Hrs.)

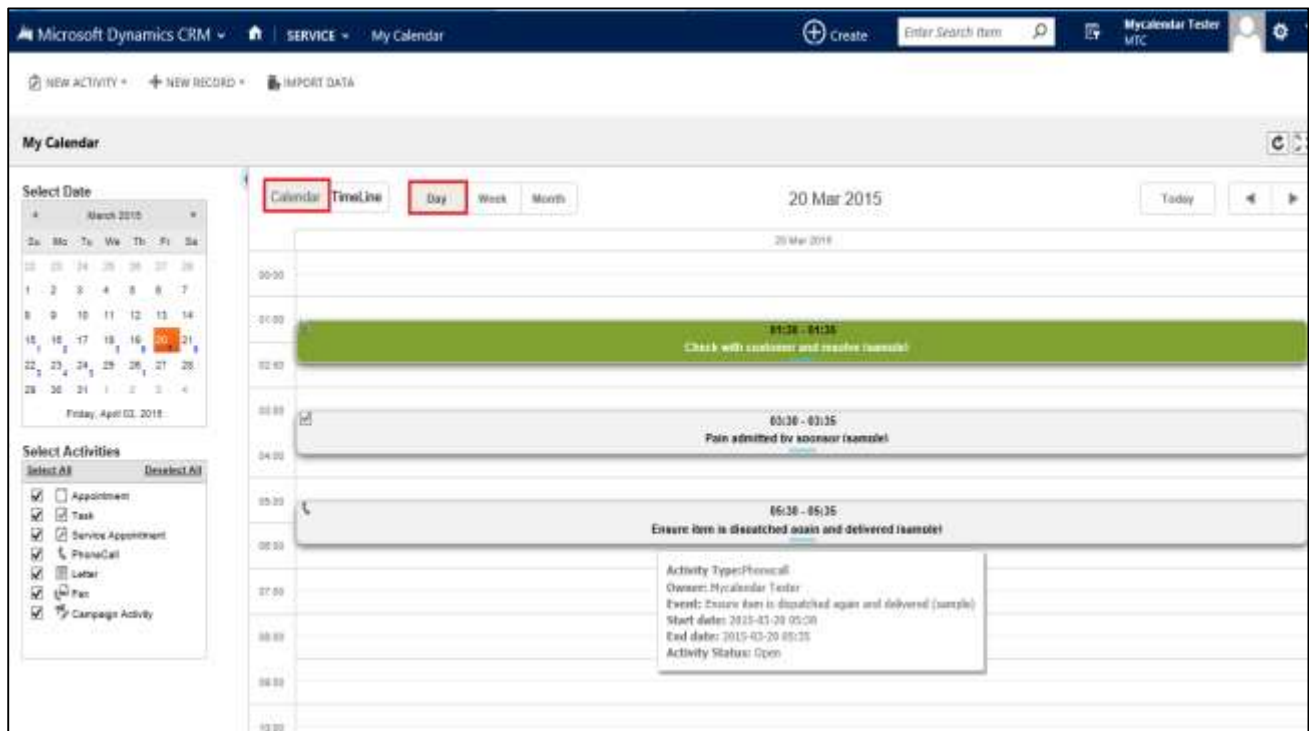


Figure 20: Calendar View - Day wise

- Here in this Day wise calendar, one can view always for the selected day of the month.
- The Top of the screen has the Time Line details for all the Task for the Day, user has the facility to scroll up or down to view the record details.
- User can also select Calendar view for Single Activity or Multiple Activities to view Weekly calendar

Time Line View – Day Wise (O Hrs. to 23 Hrs.)

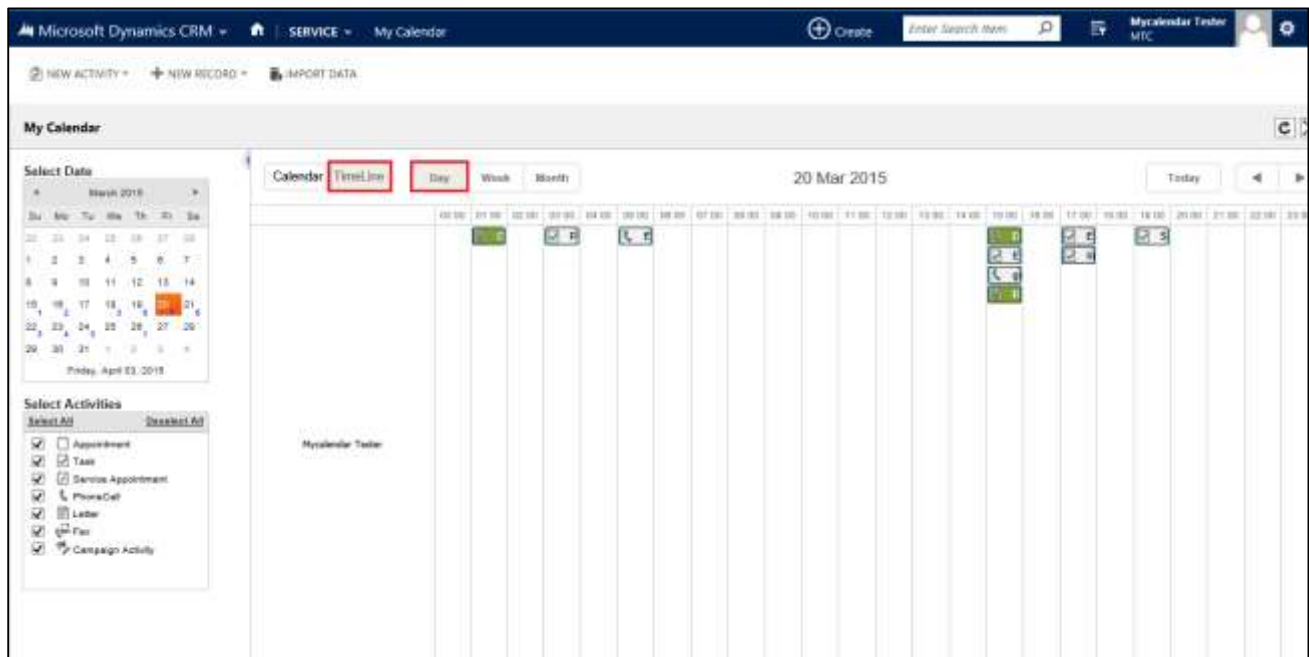
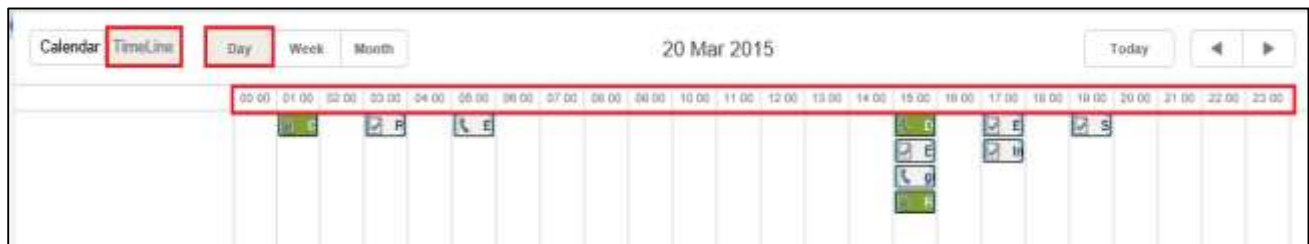


Figure 21: Time Line View Hours wise



- In this Time Line View you can view for the Selected Day on Hourly basis

Time Line View – Weekly View

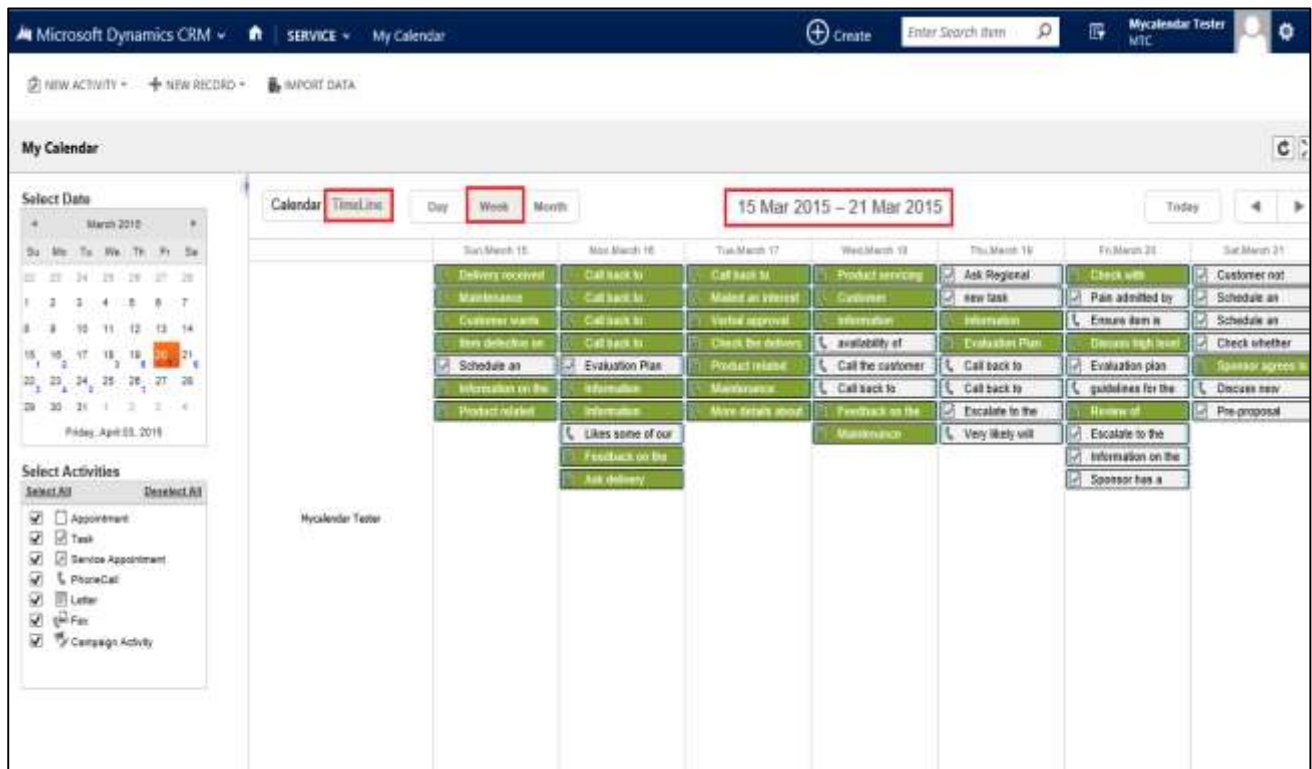


Figure 22: Time Line View – Weekly



- On Selection of the Week, it always displays calendar from Monday to Sunday of the Selected week only
- Weekday along with Month and Date is displayed

Time Line View – Monthly View (01 to 31st)

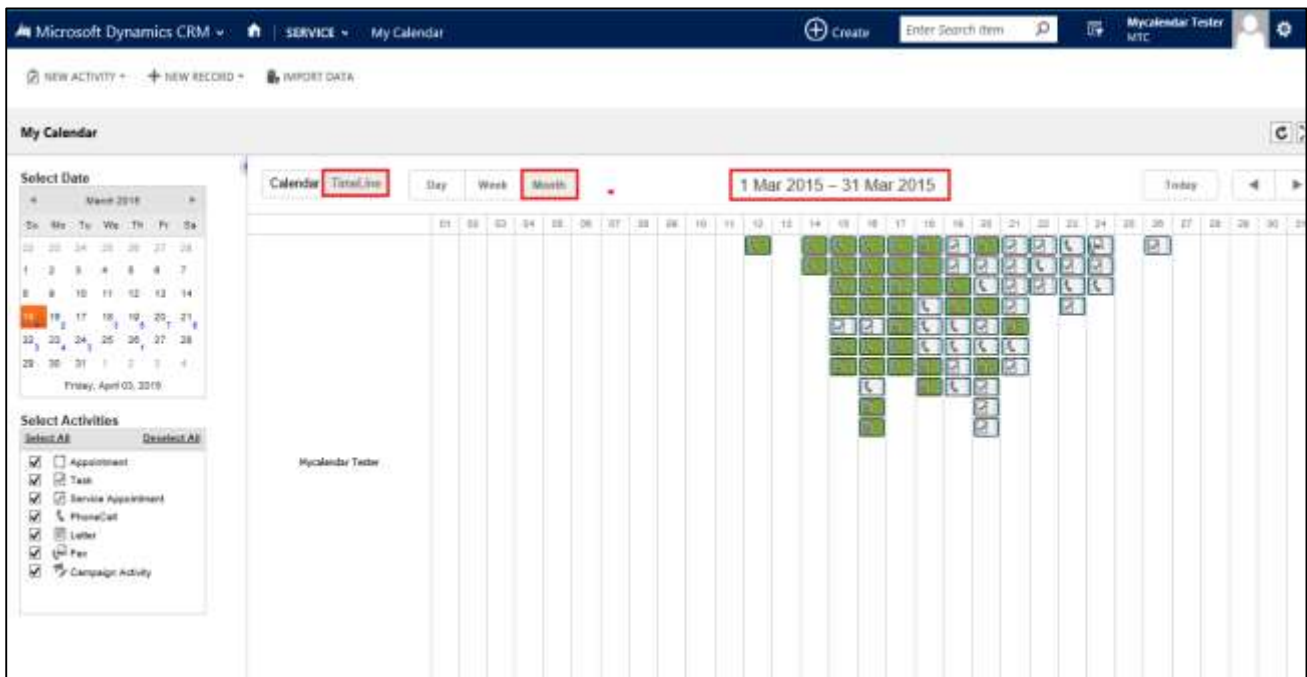


Figure 23: Time Line Monthly - Date wise



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

Uninstallation Process

- To uninstall My Calendar, Navigation is **Settings** → **Solutions** → Select the check box of **My Calendar** then click on **Delete** as shown below.

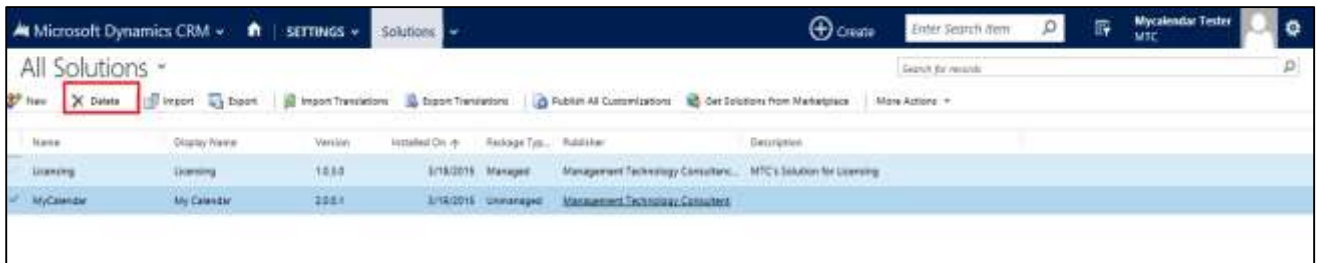


Figure 24 : Deleting My Calendar Solution

- Click on OK to delete the solution from CRM. The solution will be deleted

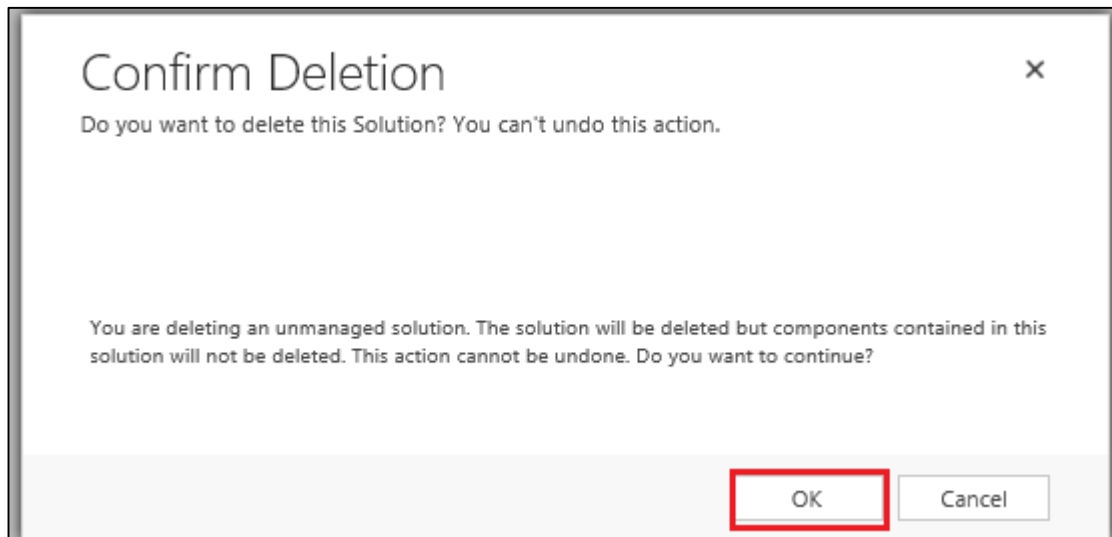


Figure 25 : Uninstall Solution

- Repeat the deletion process with Licensing solution also.

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