MTC Management Technology Consulting LLC

Microsoft Dynamics CRM / XRM Platform

Group Calendar

For Microsoft Dynamics CRM

User Guide

Microsoft Dynamics CRM

CRM Versions Supported : CRM 2015 and Online

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

Group Calendar is intended for implementation by solution professionals.

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Table of Contents

COPYRIGHT **2**

DISCLAIMER **2**

PRODUCT OVERVIEW **6**

INSTALLATION PROCESS **7**

Installing Licensing Solution 8
Installing Group Calendar Solution 10
How to get License Key 12
Placing License Key 13
Adding Group Calendar Button to Entity form 14
Group Calendar Settings 23
Group Calendar Entity Selection 25
Multilanguage Support 27
Multilanguage Support for Users. 28
Import XML file for language Alerts 30

GROUP CALENDAR FUNCTIONALITY **33**

Working Hours 37
My Calendar View 38
Calendar View - Monthly (Single User) 39
Calendar view monthly - Selected Activities (for multiple Users) 40
Calendar view monthly - Selected Activities (for Team) 40
Calendar view - Week Wise (User wise) 41
Calendar view - Week Wise (Team wise) 41
Calendar View - Day wise (User wise) 42
Calendar View - Day wise (Team wise) 42
Time Line View – Day Wise - User Wise / Team Wise 43
Time Line View – Weekly View – User Wise / Team Wise 43
Time Line View – Monthly View – User Wise / Team Wise 44
Important to Note 44
Drag & Drop Activities 45

UNINSTALLATION PROCESS **46**

MTC OVERVIEW **47**

The Global CRM Community DynamicsExchange.com 47
End User License Agreement (EULA) 48

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Table of Figures

Figure 1: CRM Main Menu 7
Figure 2: Import Solution 7
Figure 3 : Select Solution Package 8
Figure 4: Importing Options window 8
Figure 5: Import Option 9
Figure 6: Importing Solution – Licensing 9
Figure 7: Select Group Calendar Solution Package 10
Figure 8: Solution Information 10
Figure 9: Importing Solution 11
Figure 10: Developer Resources 12
Figure 11: Organization Unique Name 12
Figure 12: Configuration Screen 13
Figure 13: Licensing the Product 13
Figure 14: Solution import Ribbon Work 14
Figure 15: Solution information Ribbon Work 14
Figure 16: Solution import successful 15
Figure 17: New Solution 15
Figure 18: New Solution Add Entity 16
Figure 19: Select Solution Components 16
Figure 20: Select Missing Req. Components 17
Figure 21: Solution Web resource 18
Figure 22: Open Ribbonworkbench 18
Figure 23: Customize the Button 19
Figure 24: Add Action to Command 19
Figure 25: Add Action to Command… Contd 20
Figure 26: Select JavaScript function 20
Figure 27: Choose JavaScript function to open Group Calendar 21
Figure 28: JavaScript function name 21
Figure 29: Solution information 22
Figure 30: CRM Lead form 22
Figure 31: Configuration Screen 23
Figure 32: Calendar Setting - Views 23
Figure 33: Show Create Activity 24
Figure 34: Configuration Screen 25
Figure 35: Group Calendar Entity Selection 25
Figure 36: Main CRM menu 27
Figure 37: CRM Administration screen 27
Figure 38: Language Setting Screen 28
Figure 39: Group Calendar Screen showing Settings 28
Figure 40: Set Language Options 29
Figure 41: Group Calendar shown in Local Language 29
Figure 42: CRM displaying Active Label Languages 30
Figure 43: Importing XML file for alerts 31
Figure 44: Label language information 32
Figure 45: CRM Dashboard 33
Figure 46: CRM Dashboard... cont 33
Figure 47: Calendar view - CRM 33

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Figure 48: Create Activity 34
Figure 49: How to Set Working Hours 37
Figure 50: My Calendar View 38
Figure 51: Calendar View - Monthly (Single User) 39
Figure 52: Calendar View - Monthly (Team) 39
Figure 53: Calendar view monthly - Selected Activities 40
Figure 54: Select Calendar - Day, Week, Month, User Wise or Time Line 40
Figure 55: Calendar view monthly - Team Activities 40
Figure 56: Calendar view - Week Wise 41
Figure 57: Calendar view - Team Wise 41
Figure 58: Calendar View - Day wise 42
Figure 59: Calendar View - Team 42
Figure 60: Time Line View Hours wise 43
Figure 61: Time Line Hours View Enlarged 43
Figure 62: Time Line View – Weekly 43
Figure 63: Time Line Weekly View Enlarged 43
Figure 64: Time Line Monthly view 44
Figure 65: Time line Monthly view - Enlarged 44
Figure 66: Drag & Drop - Message 45
Figure 67 : Deleting Group Calendar Solution 46
Figure 68: Uninstall Solution 46

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Product Overview

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

The key features of Group Calendar are:

- User groups or multiple CRM users to view group calendar
- Save and Retrieve any calendar of your choice
- User can select the entity, color and tooltip attributes.
- All activities like phone, appointment, task etc. are available to view in calendar
- All calendars displayed either in Calendar view or Time line view
- Displays activities for one or more users
- Simple overview to control conflicts
- One simple Calendar for one and all
- View calendar as per your choice – day, week, month, year
- Views available User(s) wise and Team wise or Facilities wise
- Different color coding for activates
- Tooltip Color display for all attributes
- User specific rights assigned for every user
- User defined color codes for every activity
- 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
- Settings area to choose which activities should appear in right click menu
- Select User views , team views and facility views
- Adding button to Entity form
- Multi language Support

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Installation Process

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

STEP 1:

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

STEP 2:

- On Downloading you will get **Group Calendar Solution.zip** (ZIP file).
- Extract the files from the downloaded folder. You will get two WINRAR ZIP files.
- Along with these solutions a XML file is also provided for Local language support,

GroupCalendar_2015_112015_9_19_managed.zip

Licensing_1_0_3_0_managed_2015.zip

Labels Languages.xml

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

STEP 3:

- To import the solution Open your CRM click on **SETTINGS→SOLUTION**

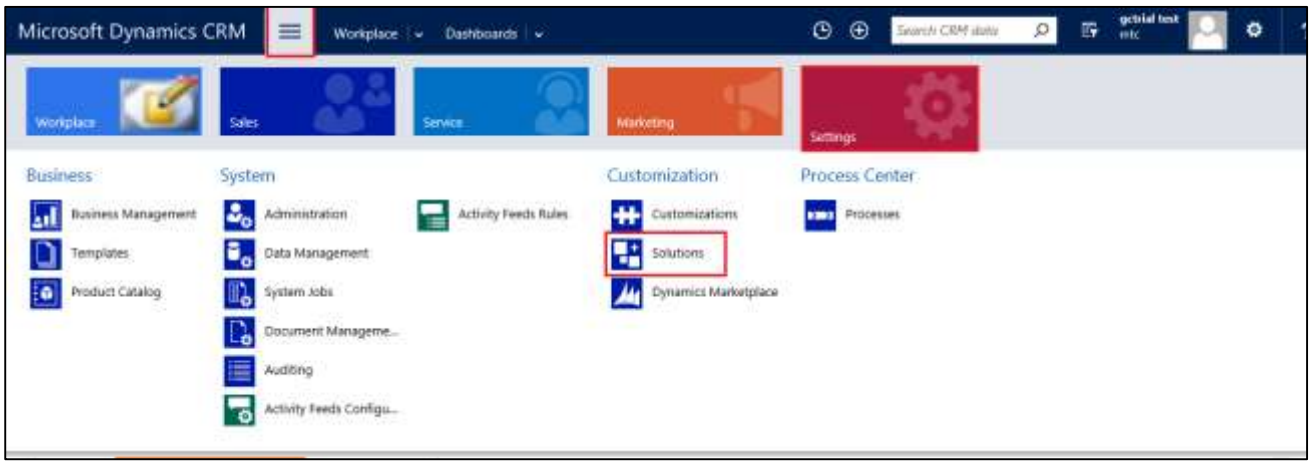

Figure 1: CRM Main Menu

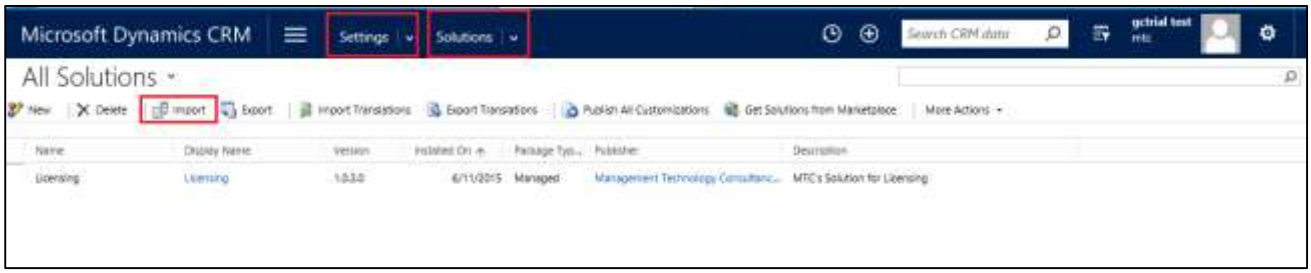

Figure 2: Import Solution

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- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.
- First Install the Licensing Solution and later followed by Group Calendar Solution

Installing Licensing Solution

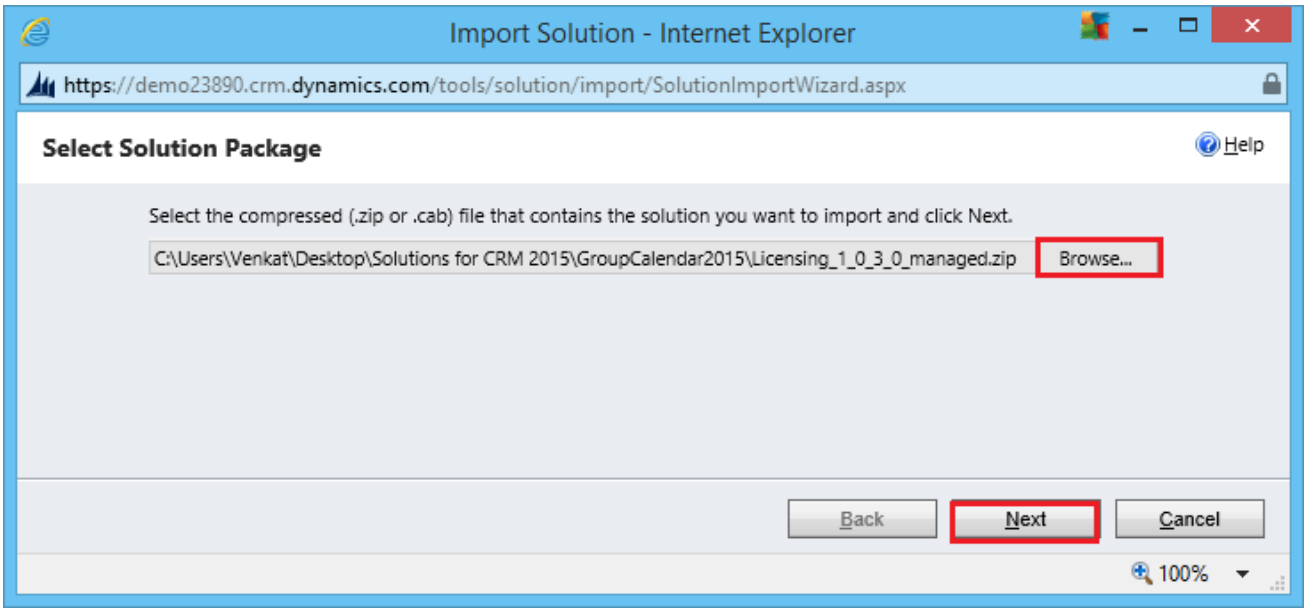

Figure 3 : Select Solution Package

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

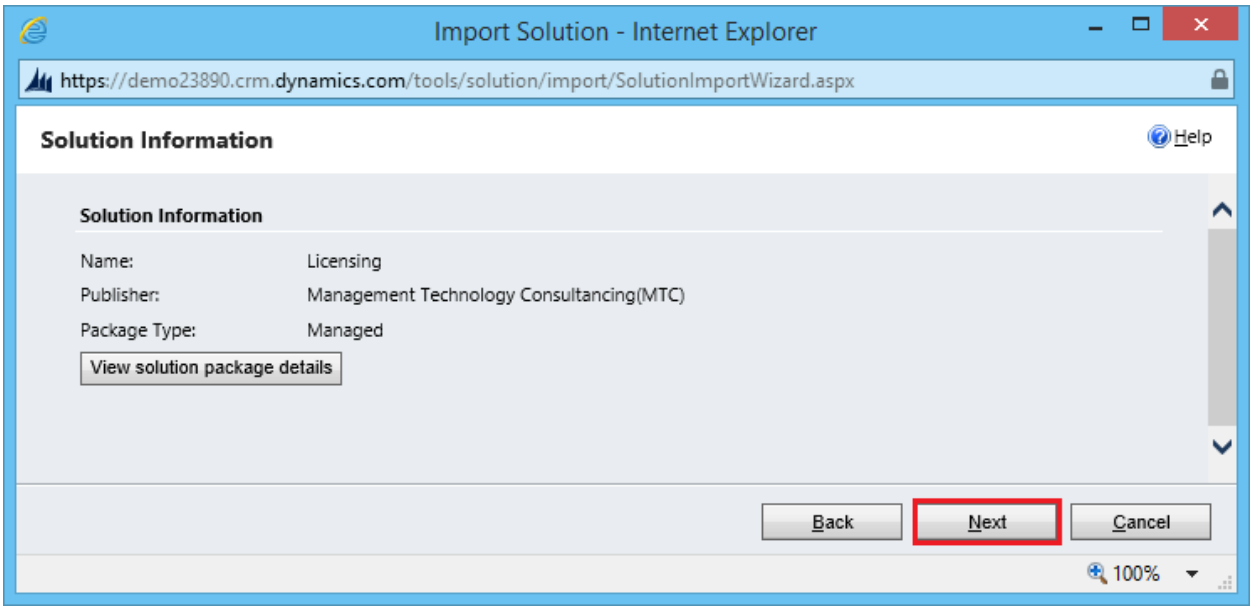

Figure 4: Importing Options window

- Click on Next to proceed

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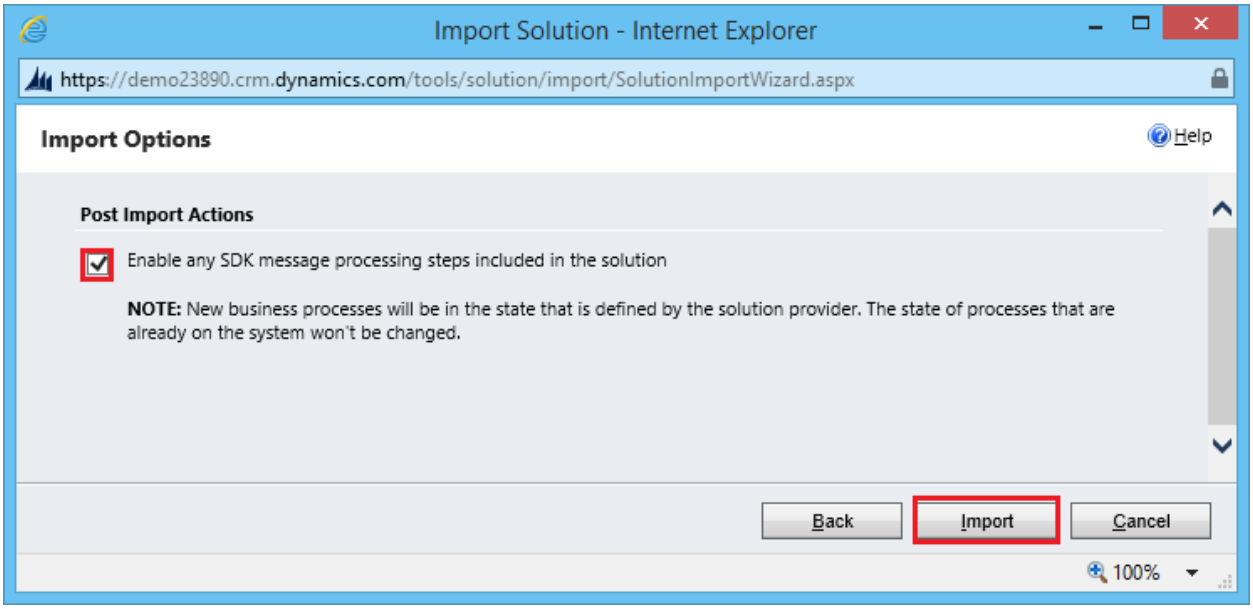

Figure 5: Import Option

- Click on Next to proceed

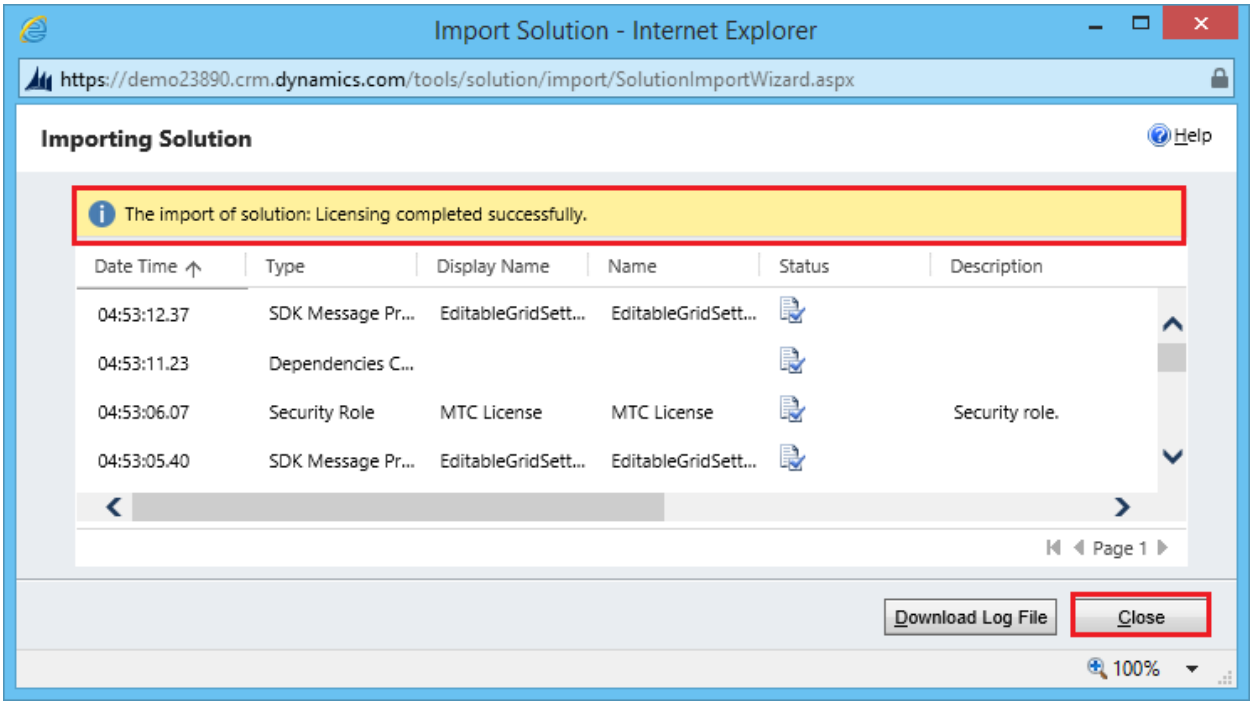

Figure 6: Importing Solution – Licensing

- Click on Close after successful completion message is displayed.

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Installing Group Calendar Solution

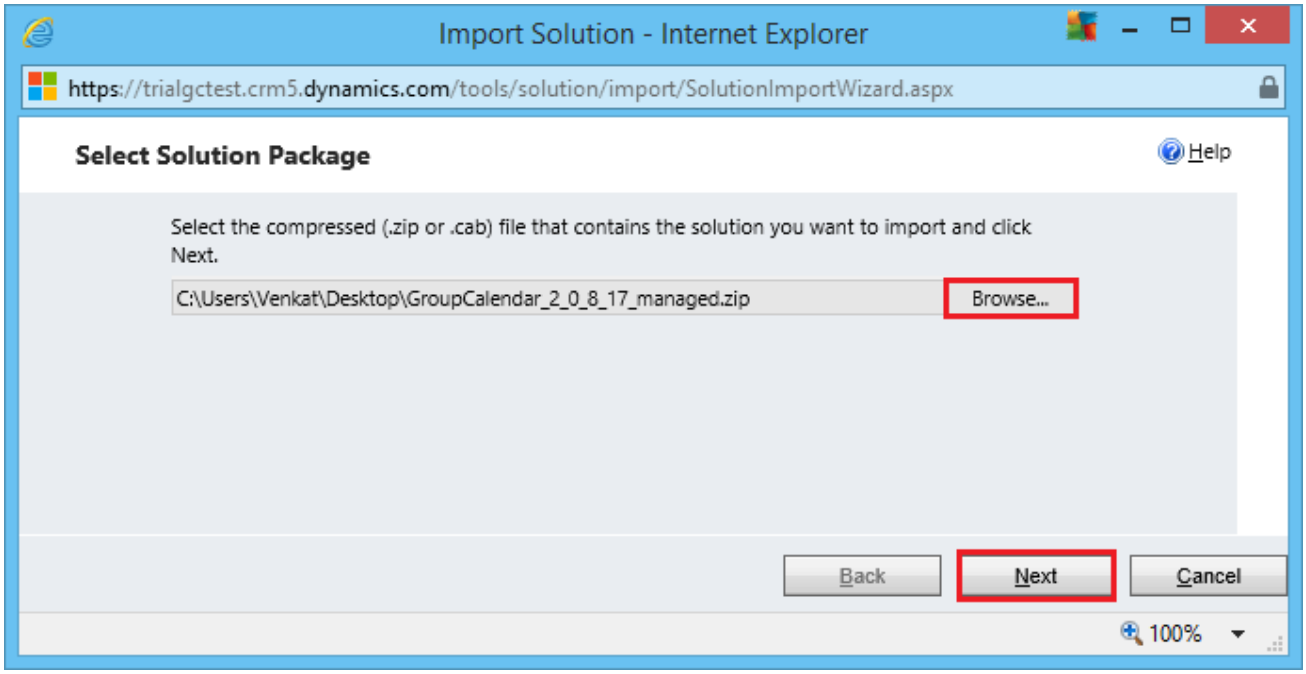

Figure 7: Select Group Calendar Solution Package

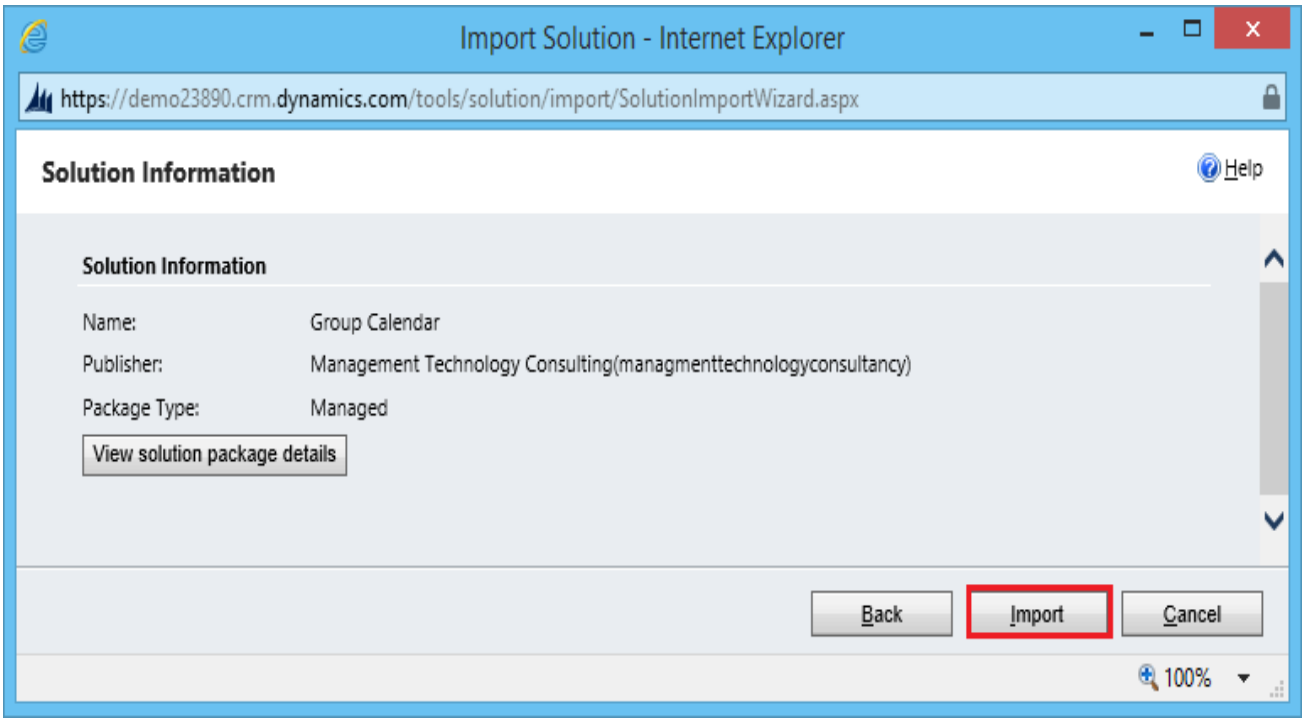

Figure 8: Solution Information

- Click on Import 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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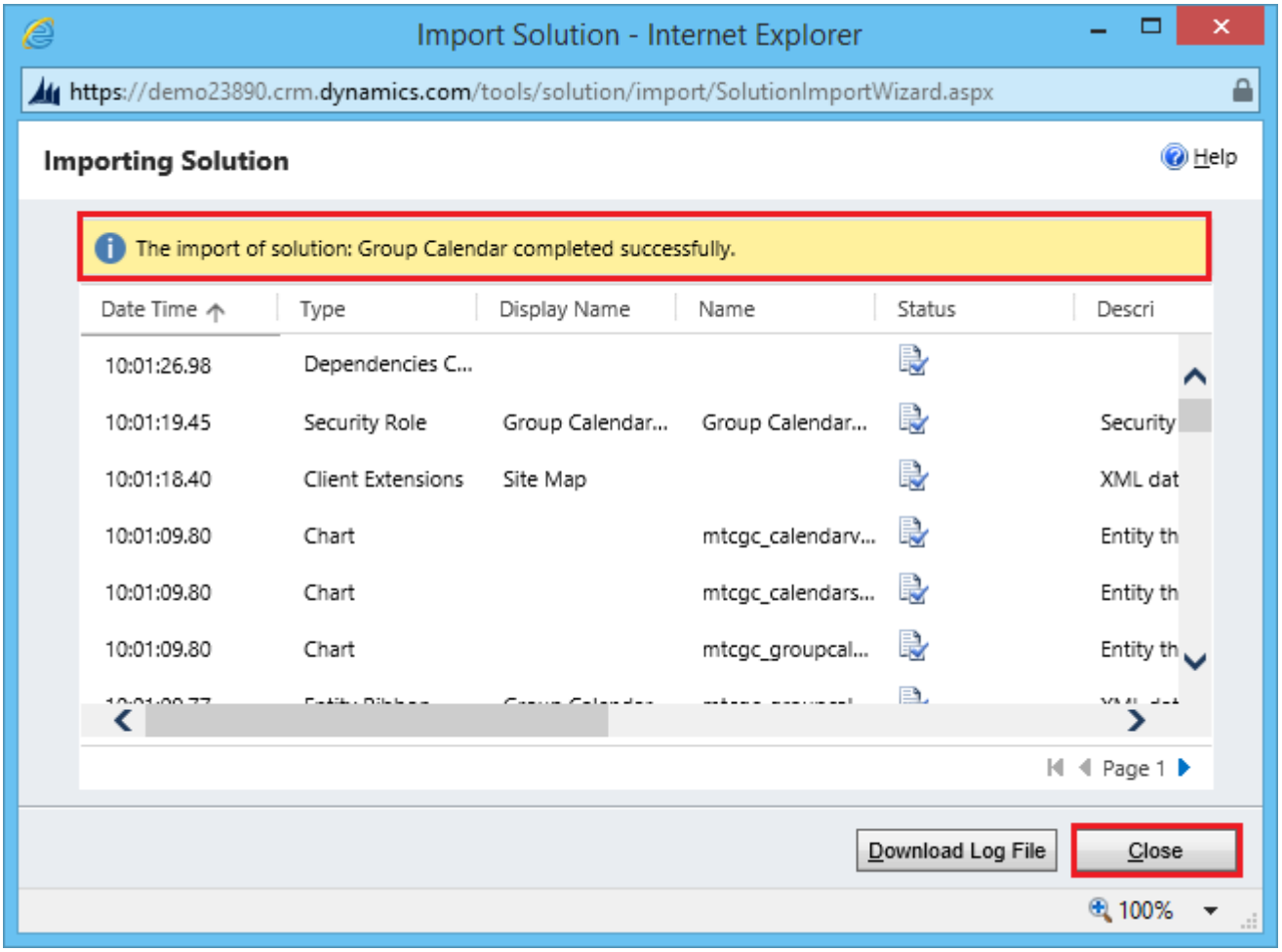
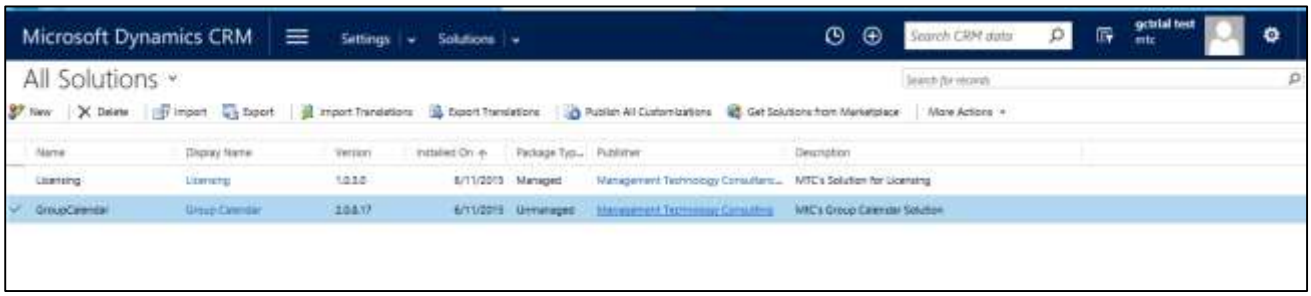


Figure 9: Importing Solution

- Click on Close button and Refresh the CRM (click on F5)

- After importing the Group Calendar Solution you need to place the License key navigate to **Settings→Solution→**Click on **GroupCalendar Solution**



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How to get License Key

- To install Group Calendar for Microsoft Dynamics CRM you will require License Key, which you can get by sending an E-mail request to **salesteam@mtccrm.com** with your Organization Unique Name.

- To access your Organization Unique Name Click on **Settings→Customizations→Developer resources** as shown

Figure 10: Developer Resources

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

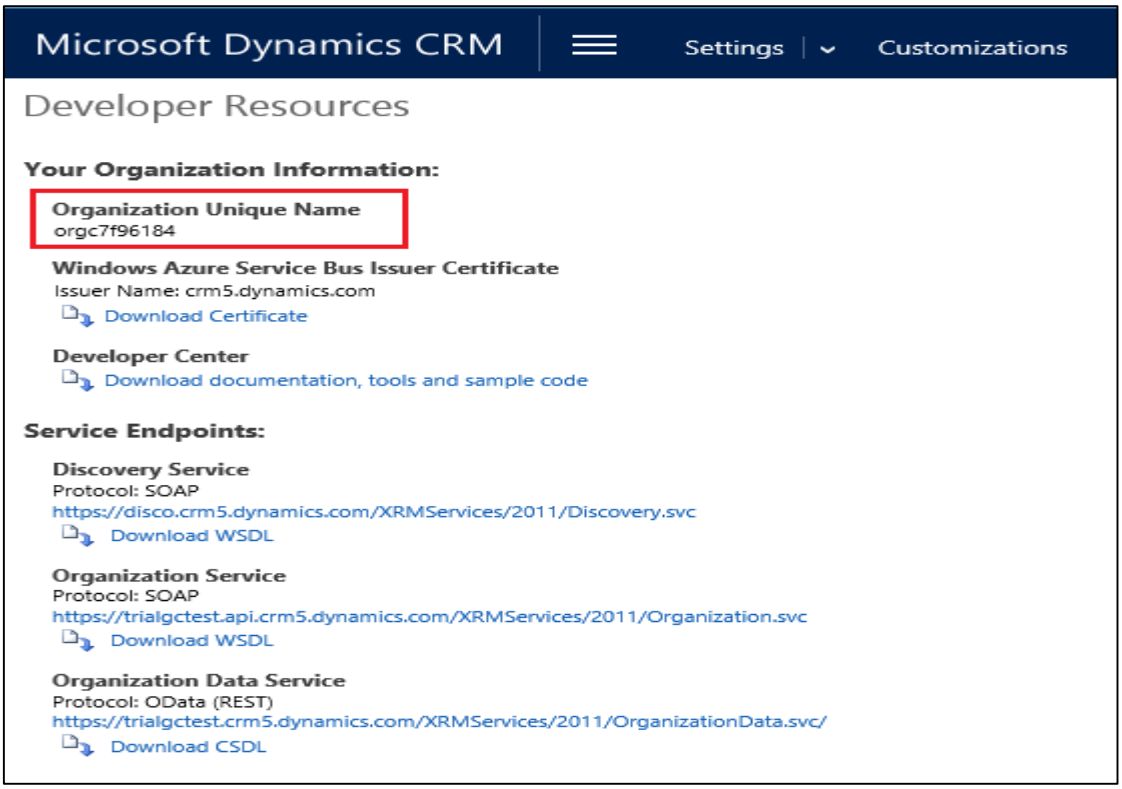

Figure 11: Organization Unique Name

- Send this Organization Unique Name through Email to salesteam@mtccrm.com and you will receive your Licensing Key within 24 hours.

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

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Placing License Key

- Double click on Group Calendar Solution , which opens a new screen as shown below

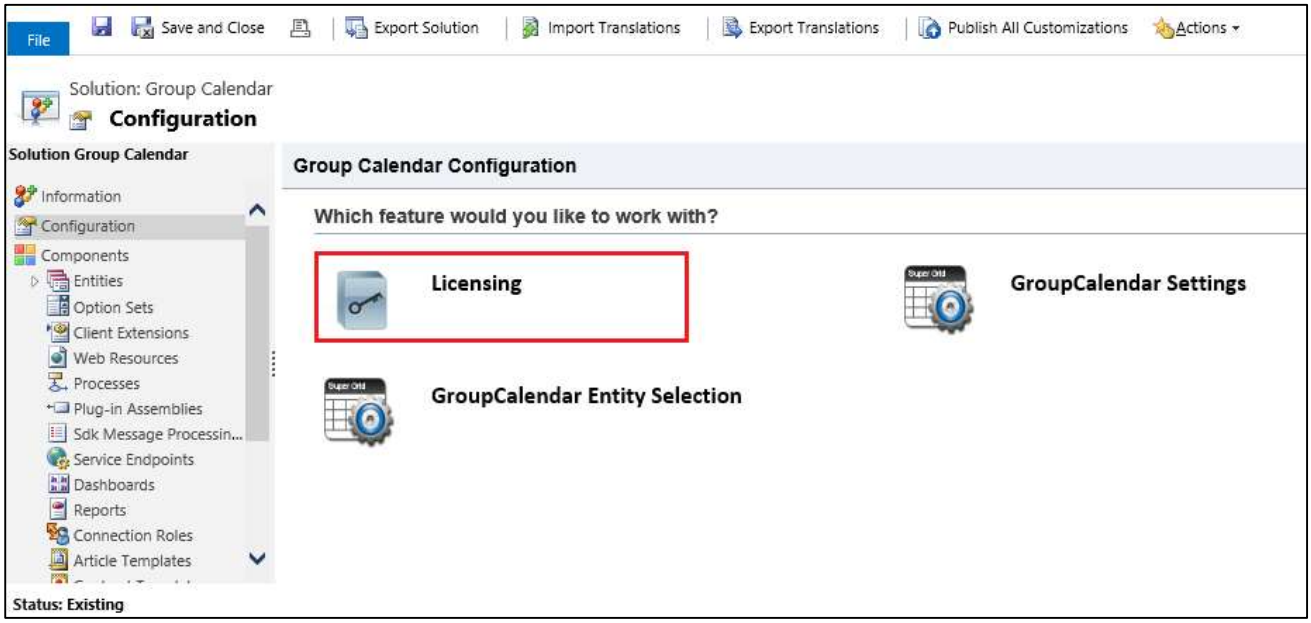

Figure 12: Configuration Screen

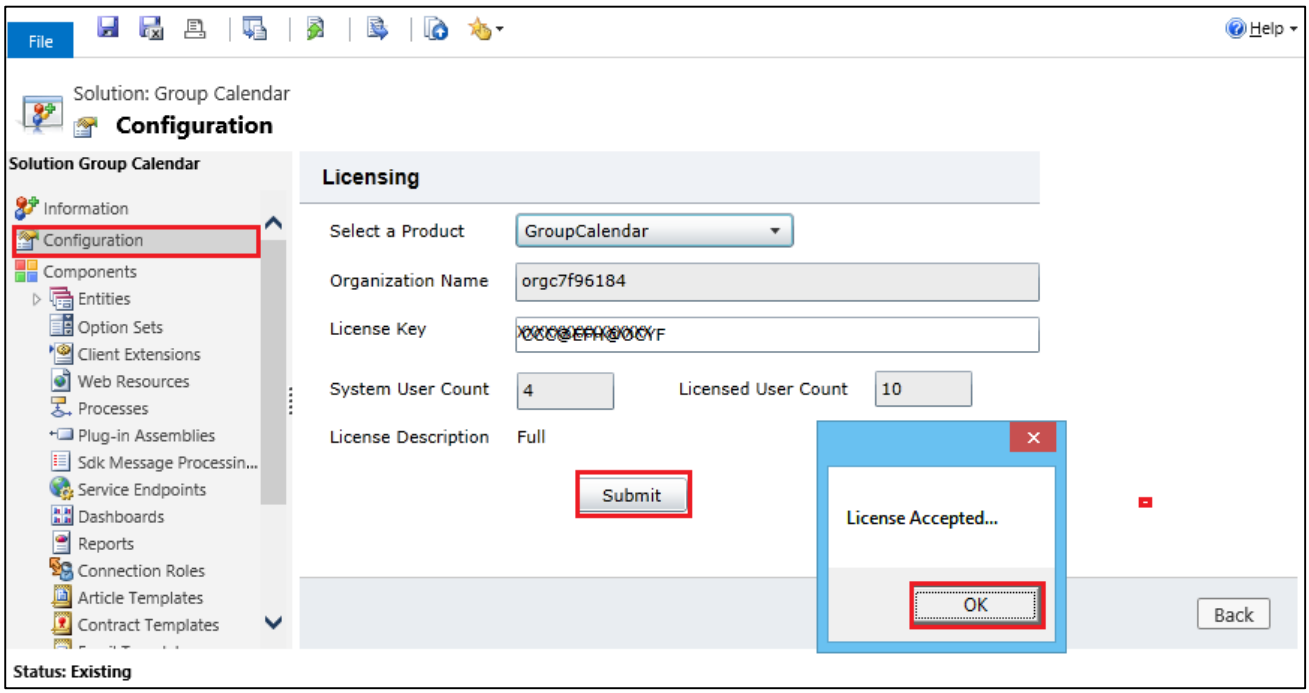

Figure 13: Licensing the Product

- Select Product as Group Calendar from the drop down list
- Enter the License key which you have received after placing the request
- Click on Submit tab
- Once License is accepted click ok to finish Installation process of the product.
- Refresh the CRM (Press F5)

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Adding Group Calendar Button to Entity form.

- Import Ribbon workbench managed solution to CRM

RibbonWorkbench2013_2_0_0_5_managed.zip

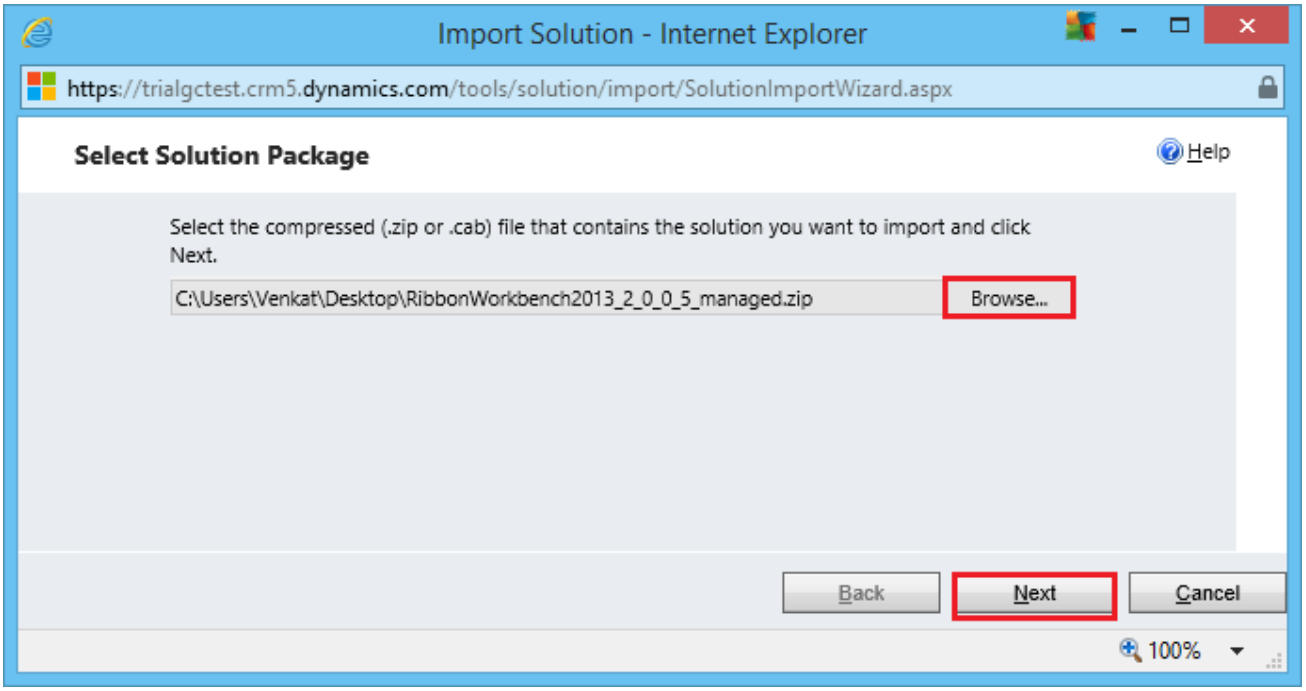

Figure 14: Solution import Ribbon Work

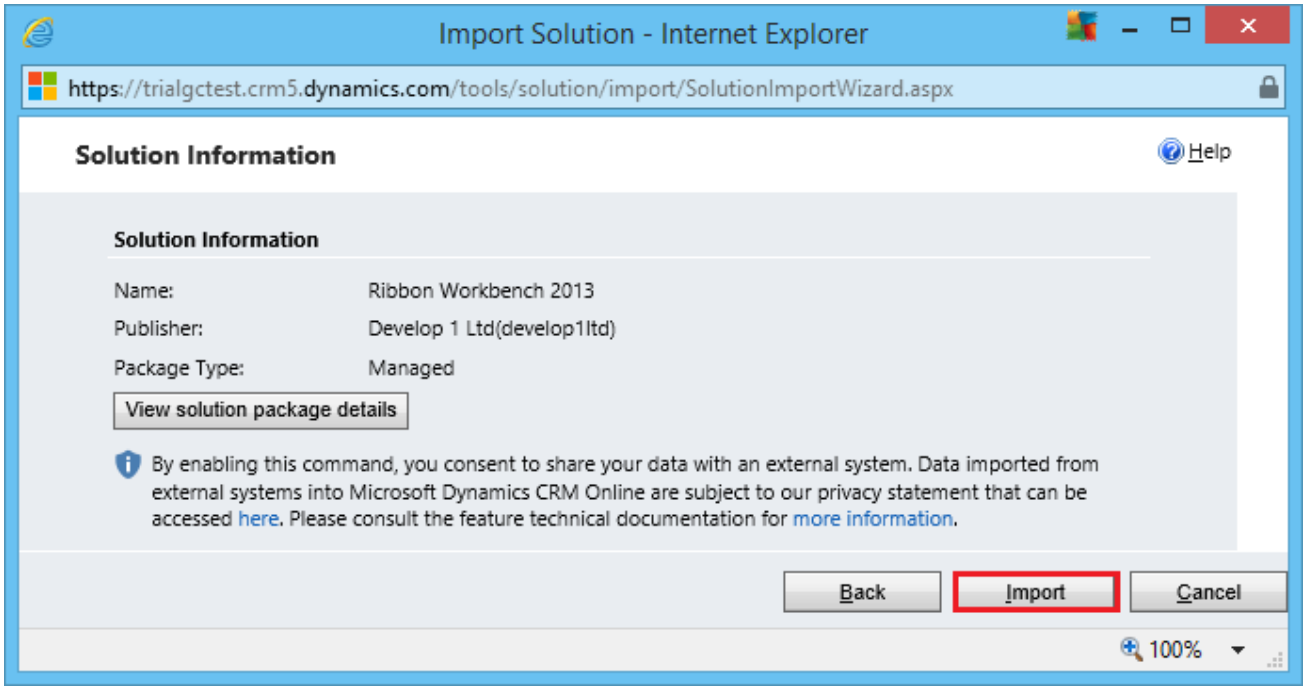

Figure 15: Solution information Ribbon Work

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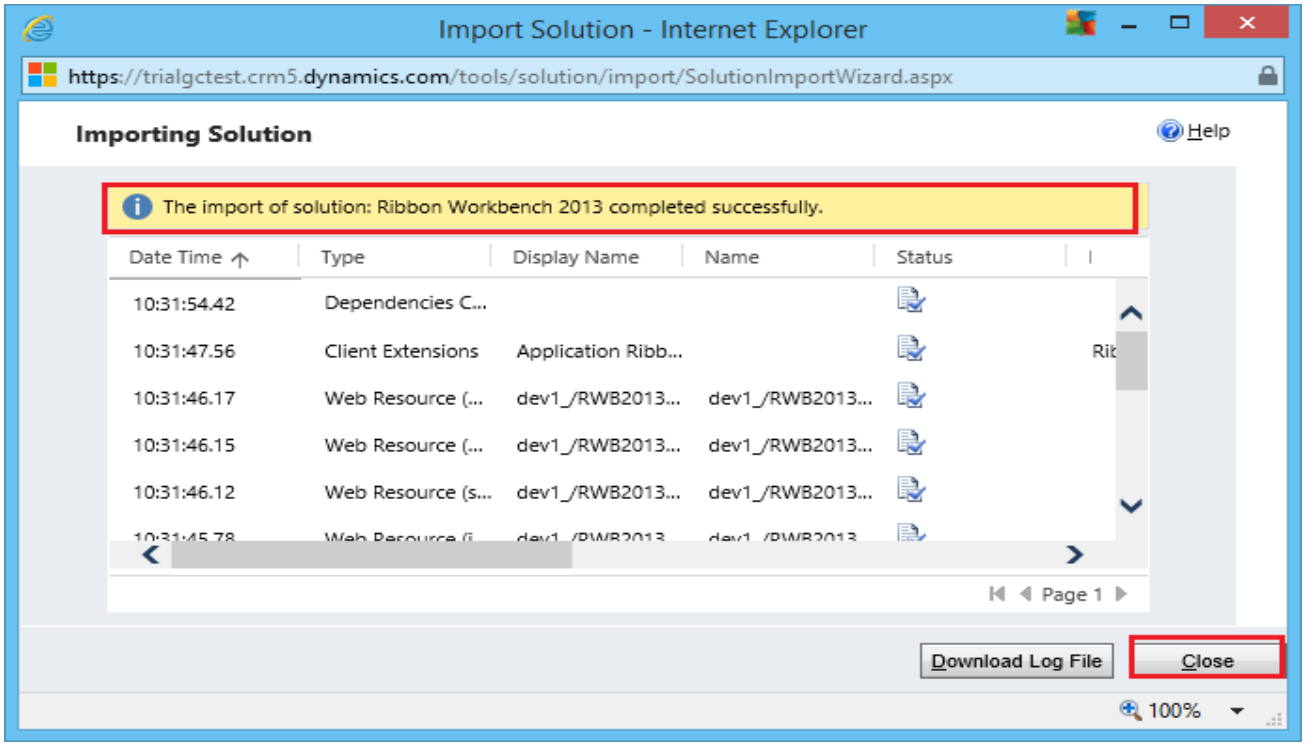

Figure 16: Solution import successful

- Create a new solution and add the entity from which Group Calendar should be launched.

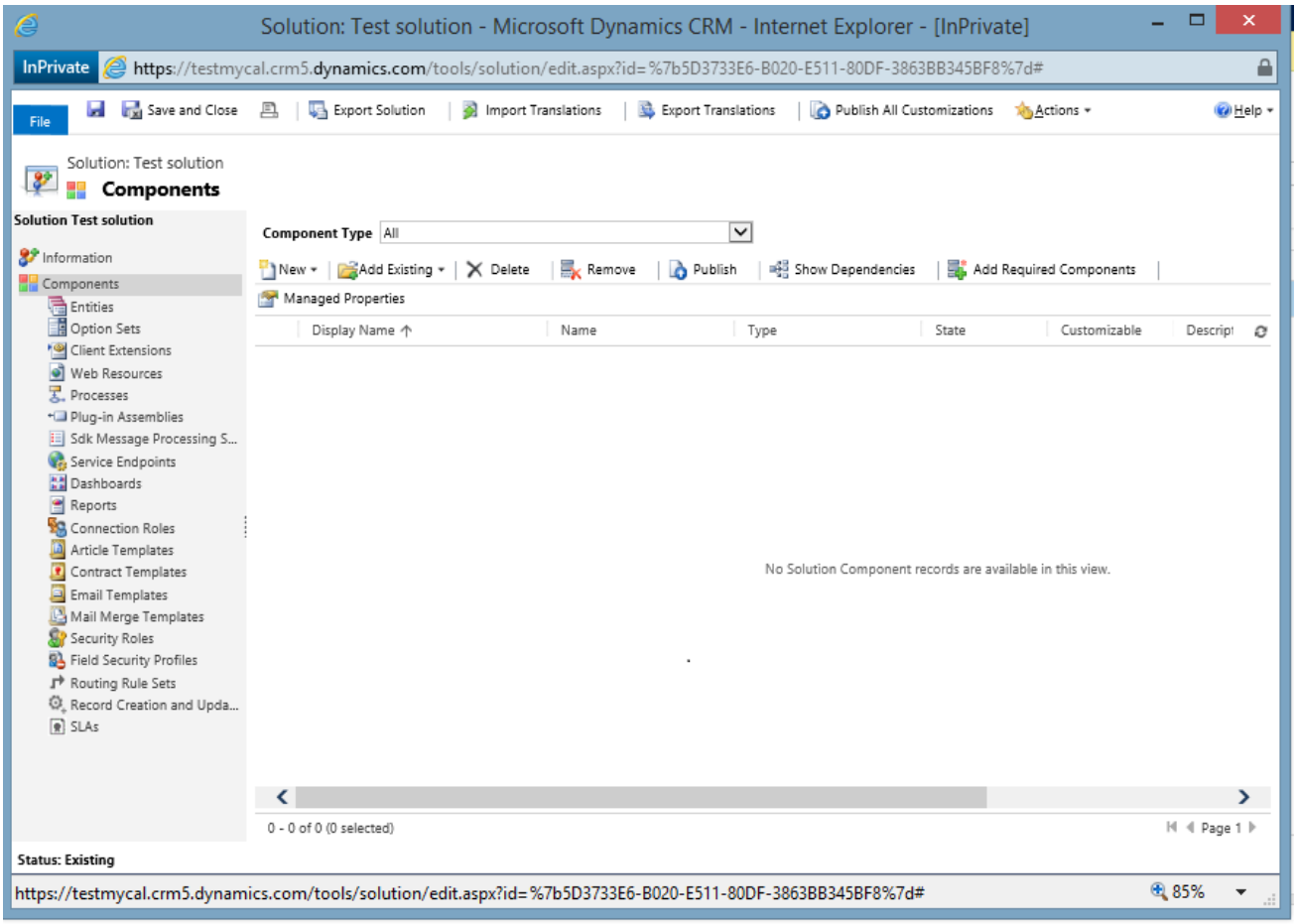

Figure 17: New Solution

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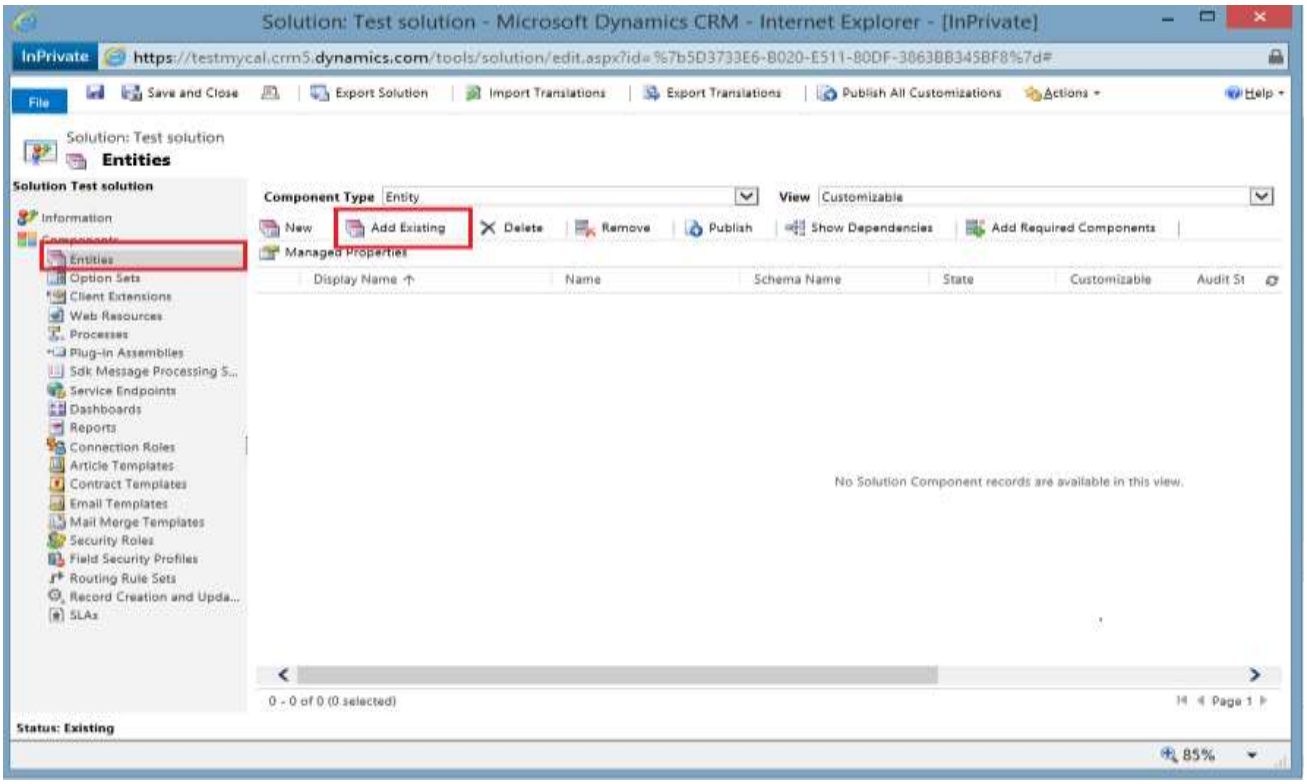

Figure 18: New Solution Add Entity

- Here in this case as an example included “Lead”.

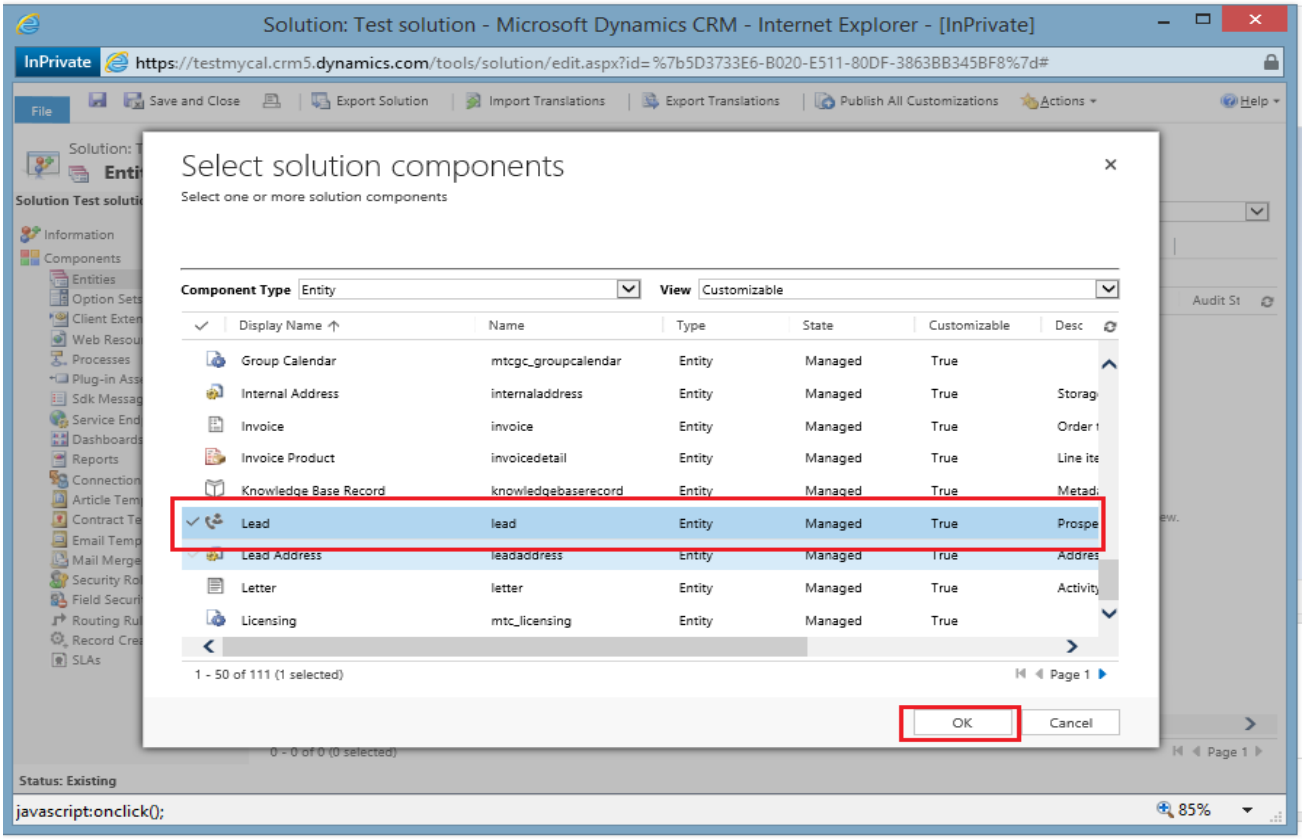

Figure 19: Select Solution Components

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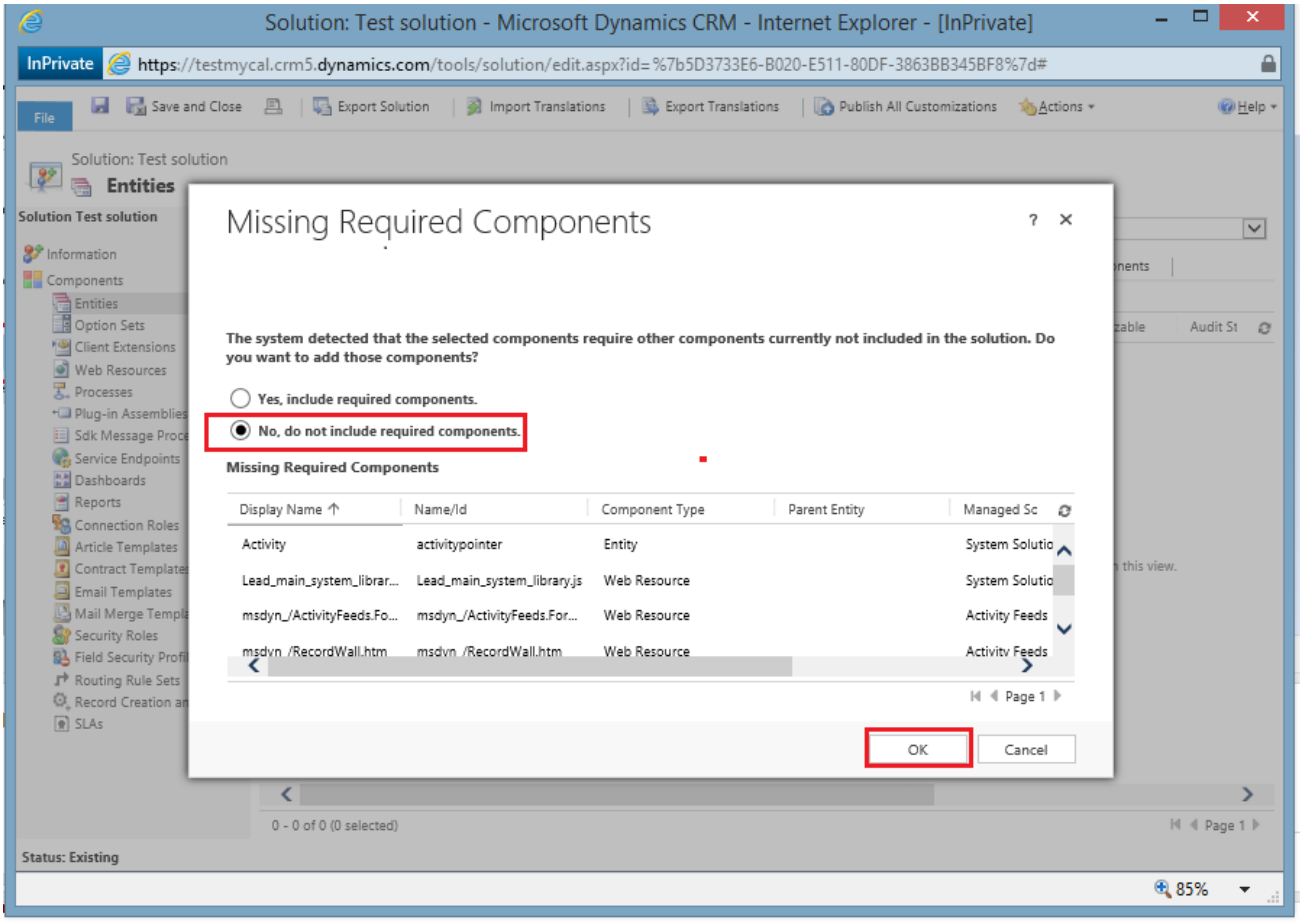

Figure 20: Select Missing Req. Components

- Write a JavaScript function to open Group Calendar and add that script file to the web resource of new solution

```
function OpenCalendar(context) {
var url=Xrm.Page.context.getClientUrl() +
"/WebResources/mtcgc_/GroupCalendar/Html/GroupCalenderScreen.Html?data=7$fullscreen"
 window.open(url, "_blank", "toolbar=yes, scrollbars=yes, resizable=yes,width=1000, height=1200");
    }
  }
```


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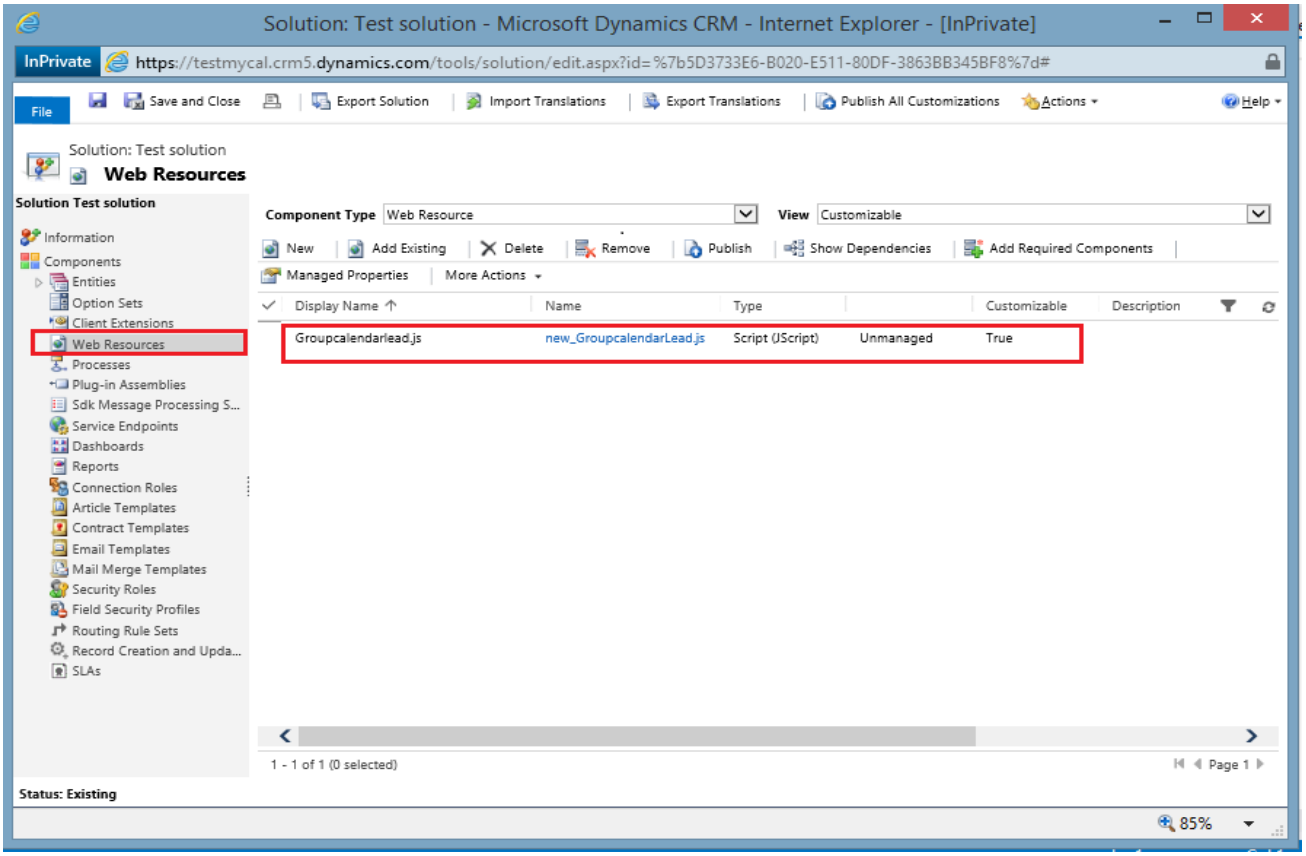

Figure 21: Solution Web resource

- Open Ribbonworkbench solution and choose the new solution that we created from the list.

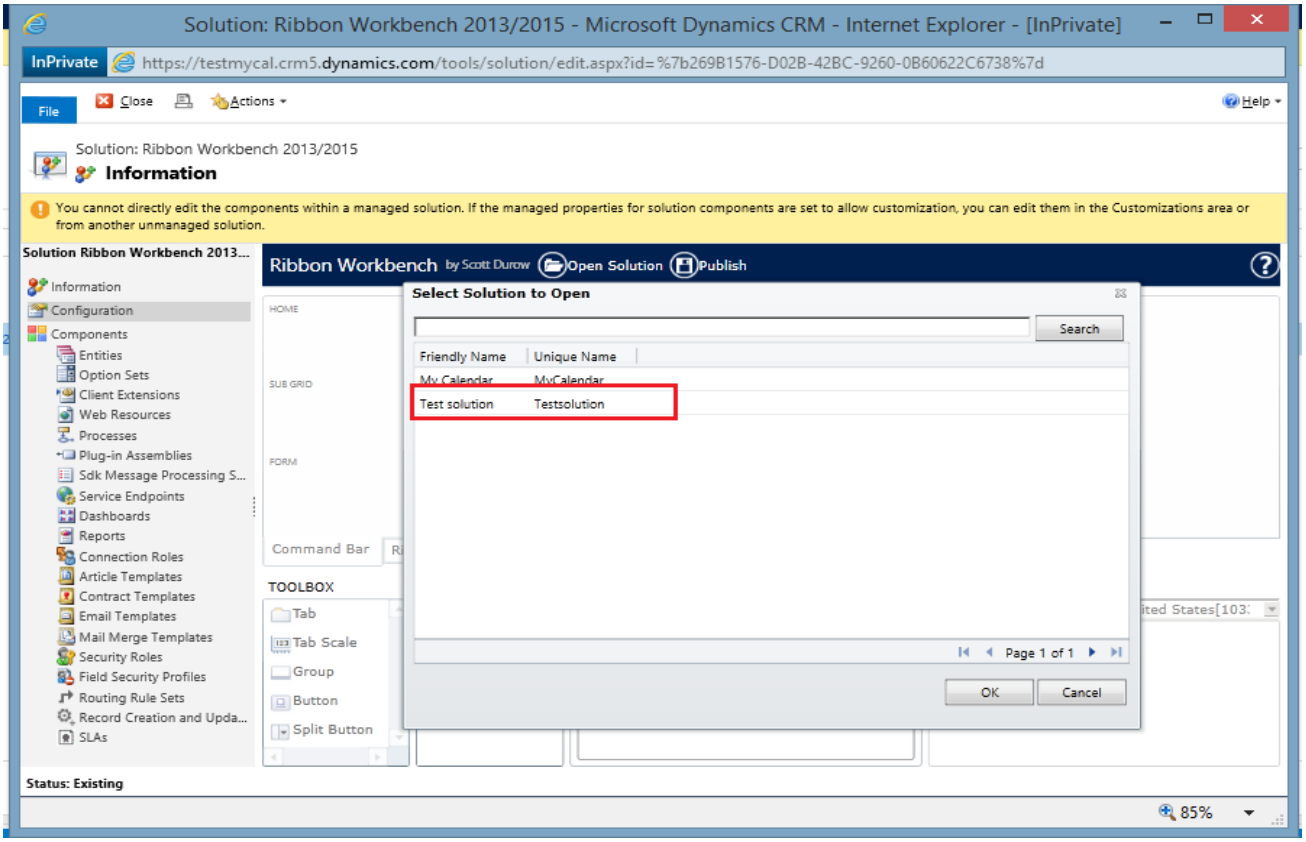

Figure 22: Open Ribbonworkbench

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- Drag the button from the menu bar and paste in lead entity form ribbon
- Customize the button

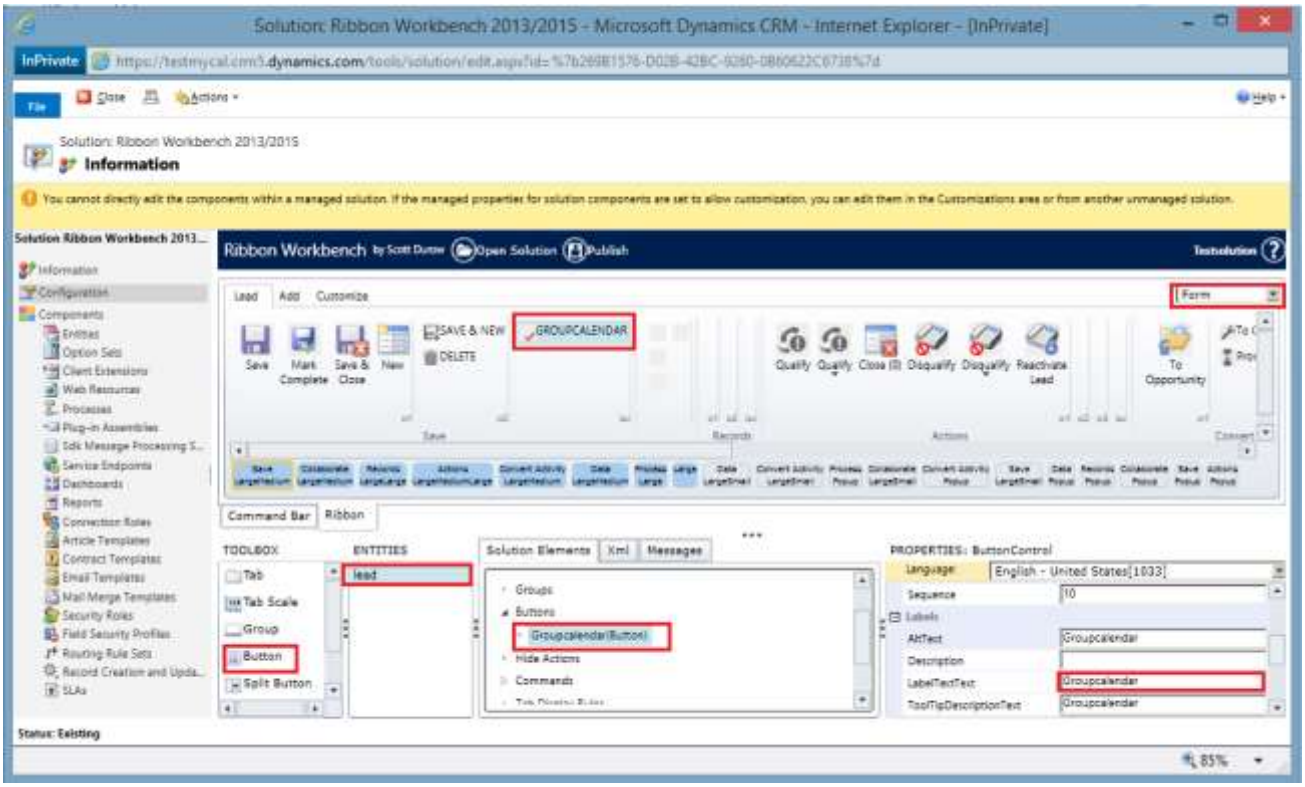

Figure 23: Customize the Button

- Create new command add action to that command.

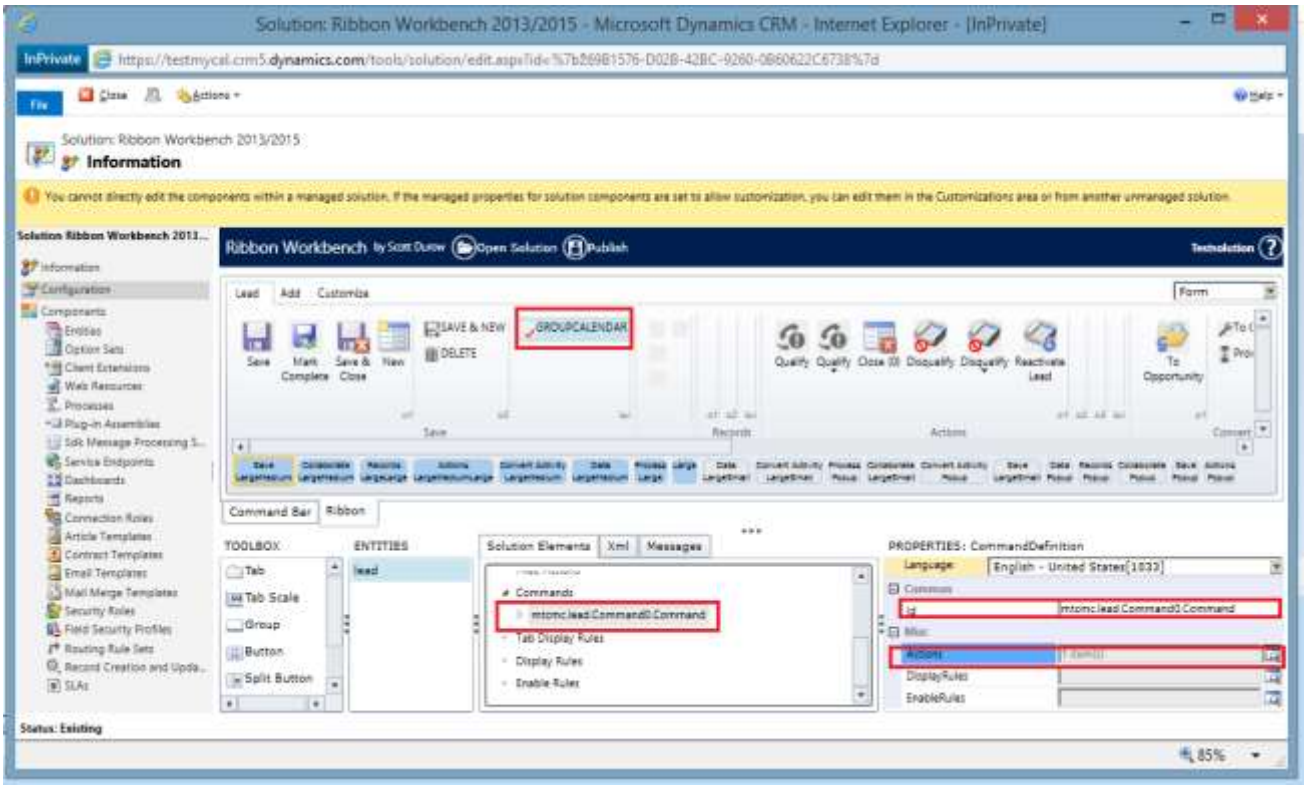

Figure 24: Add Action to Command

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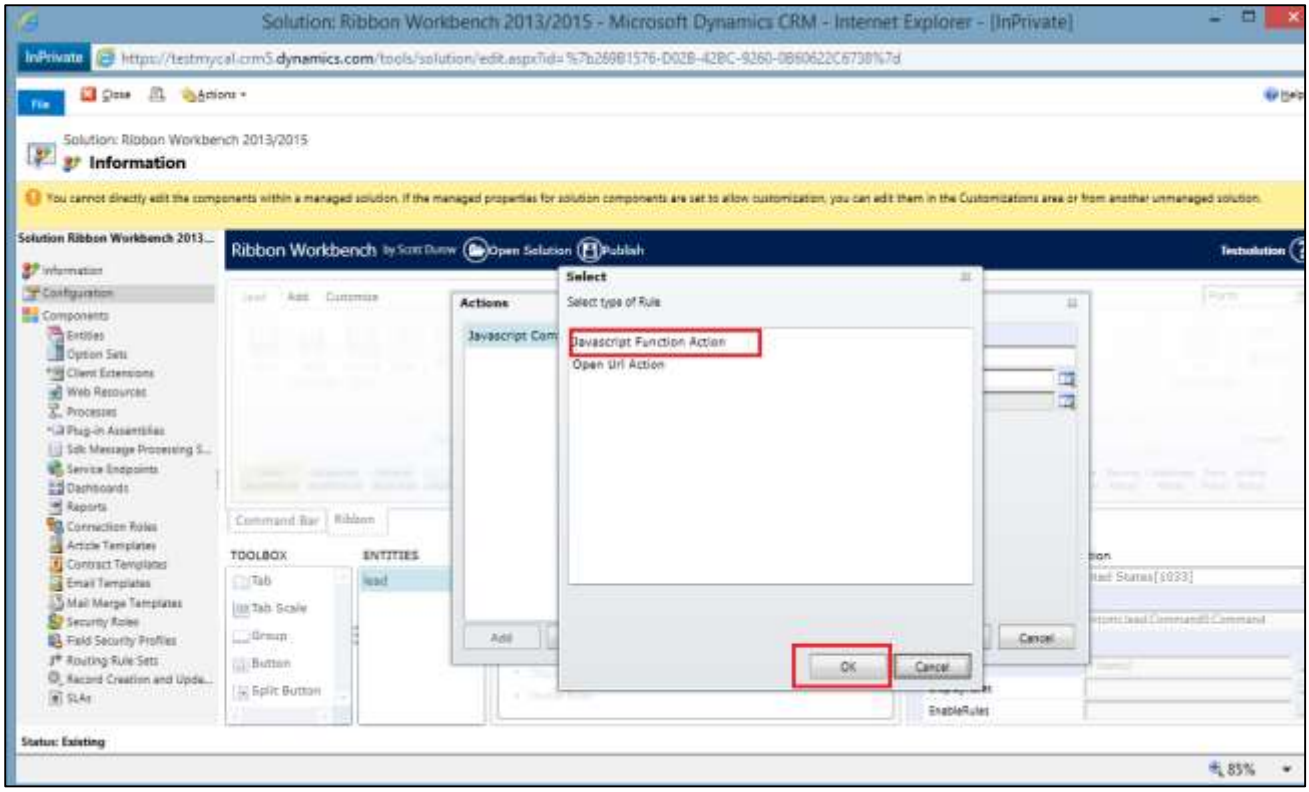

Figure 25: Add Action to Command… Contd

- Select JavaScript function action and click ok button

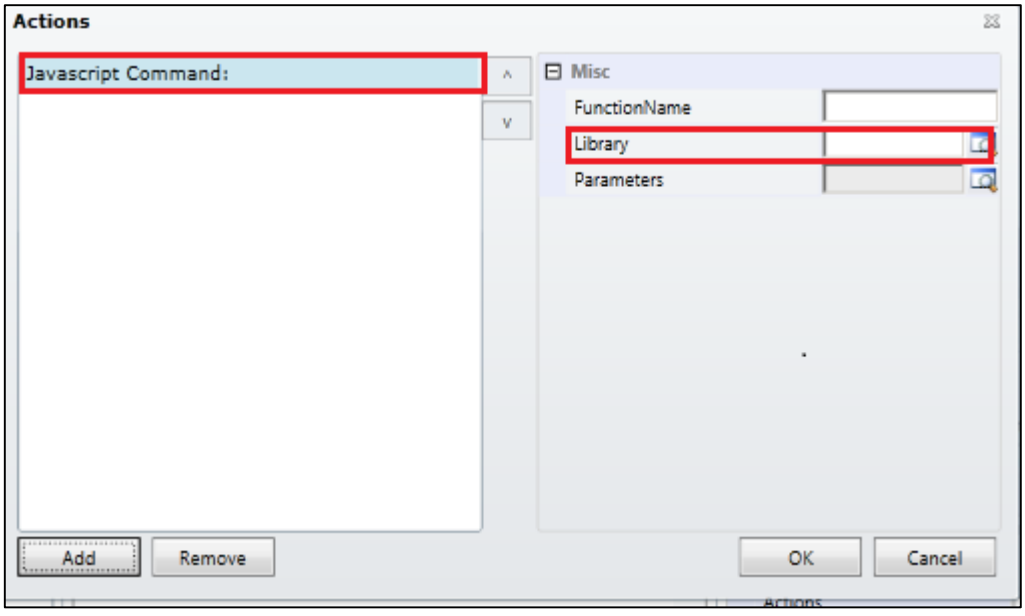

Figure 26: Select JavaScript function

- Choose JavaScript file to open Group Calendar from web resource.

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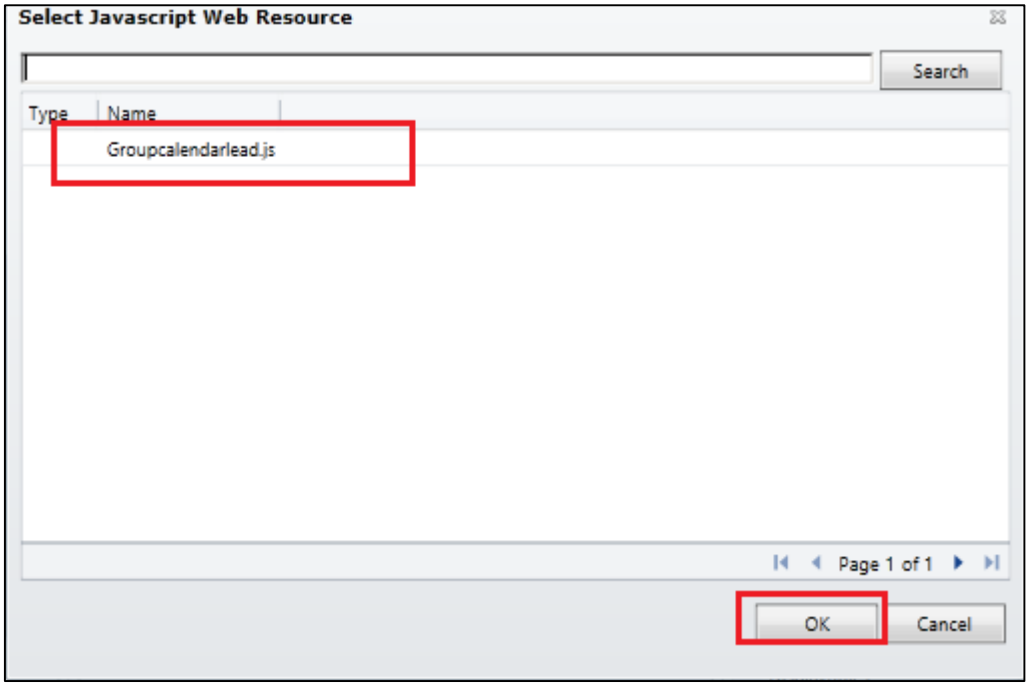

Figure 27: Choose JavaScript function to open Group Calendar

- Give the JavaScript function name in Function name textbox and click ok button

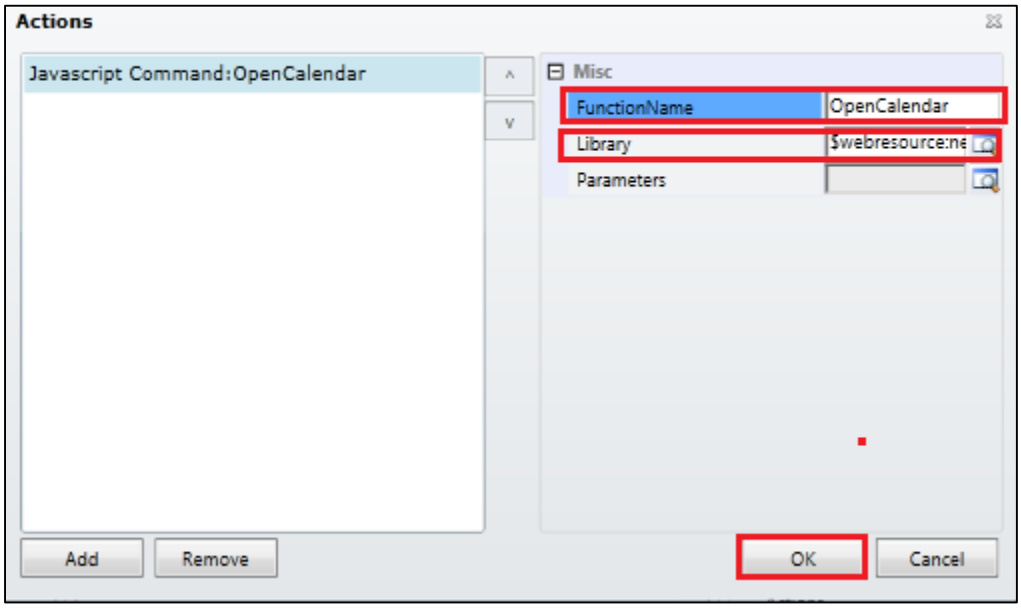

Figure 28: JavaScript function name

- Add the newly created command to the Group Calendar button and publish the solution

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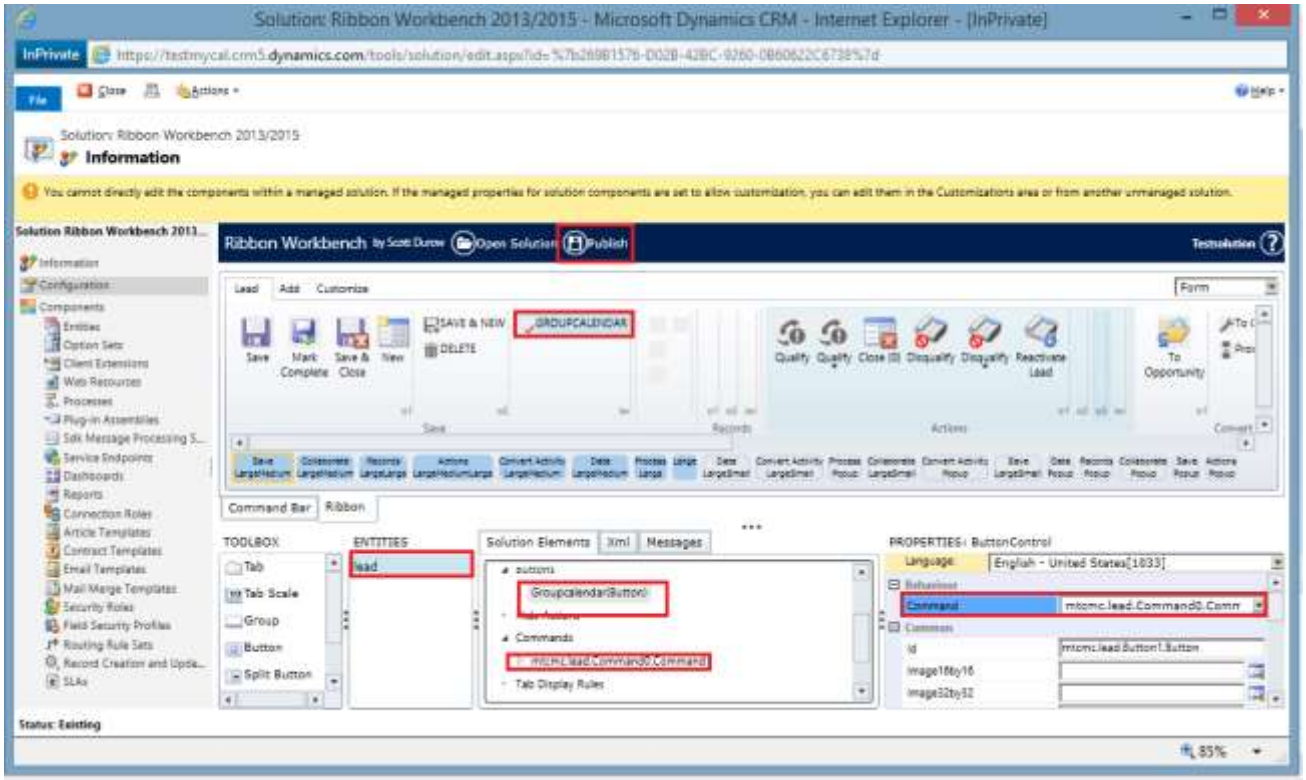

Figure 29: Solution information

- Refresh the CRM and open any lead record

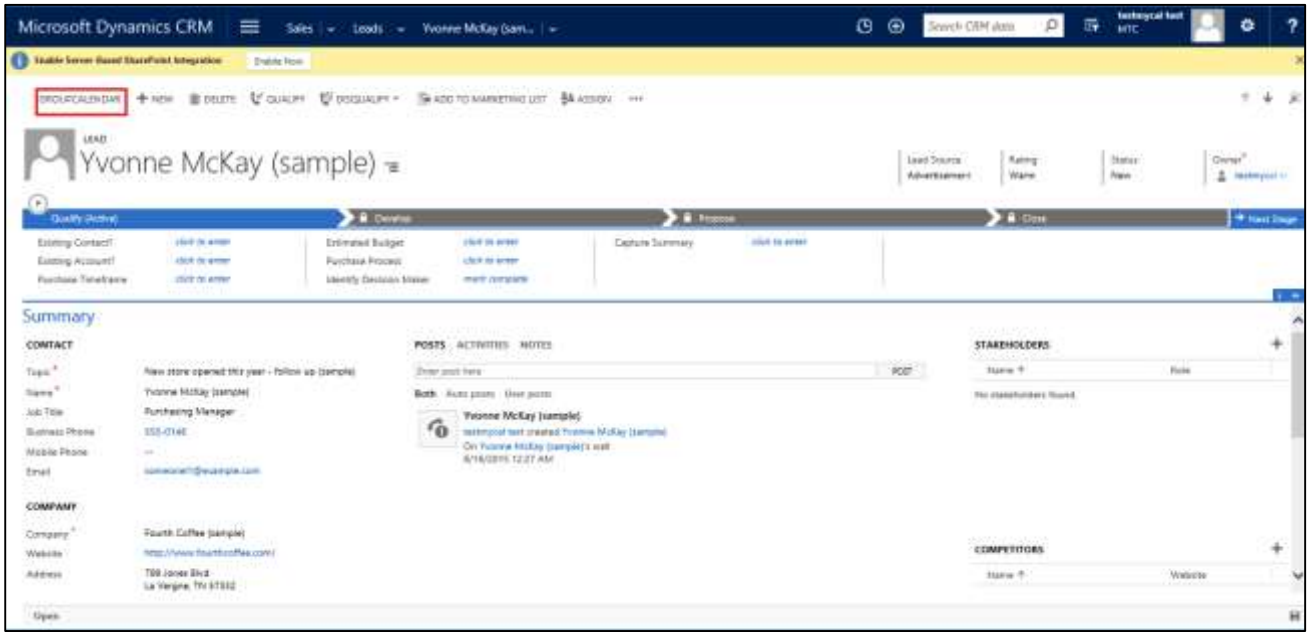

Figure 30: CRM Lead form

- Click on Group Calendar button and Group Calendar will open in new window

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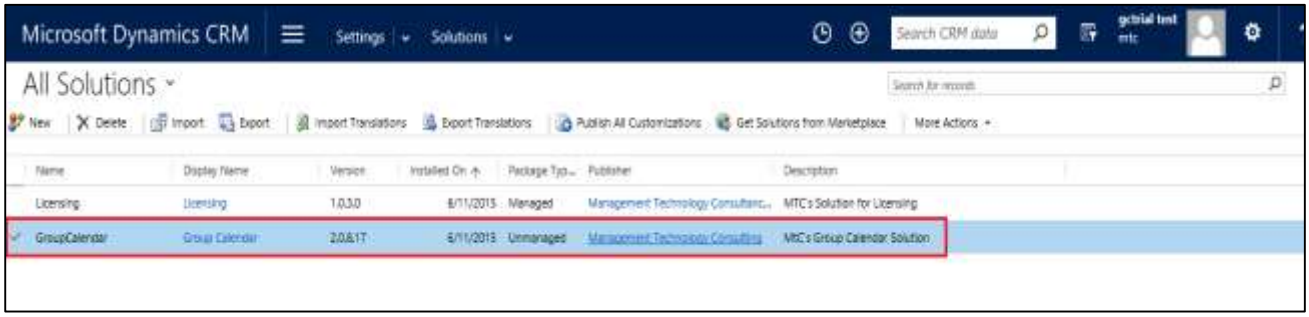
Group Calendar Settings

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



- Double click on Group Calendar Solution , which opens a new screen as shown below

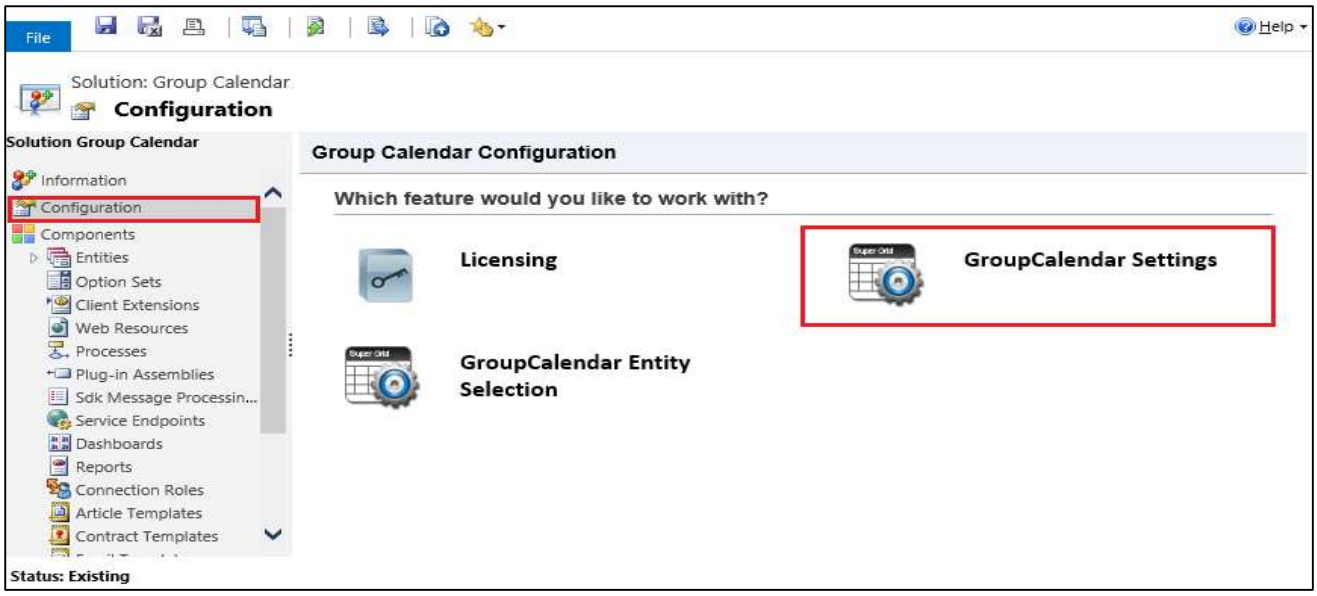


Figure 31: Configuration Screen

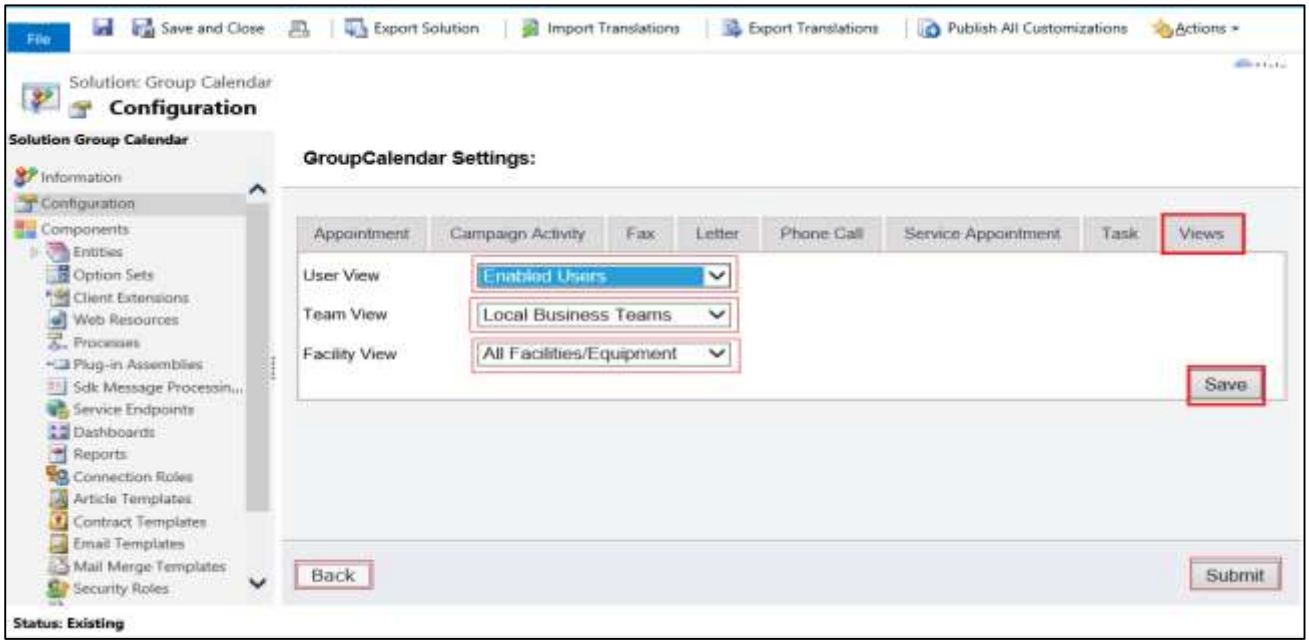


Figure 32: Calendar Setting - Views

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- 'Views' in calendar settings area for select User views, team views and facility views.
- If we select any user view users in that view will be show in calendar same in the case of team and facility.
- All the Views such as User, Team and Facility have the drop down options to select any of your choice

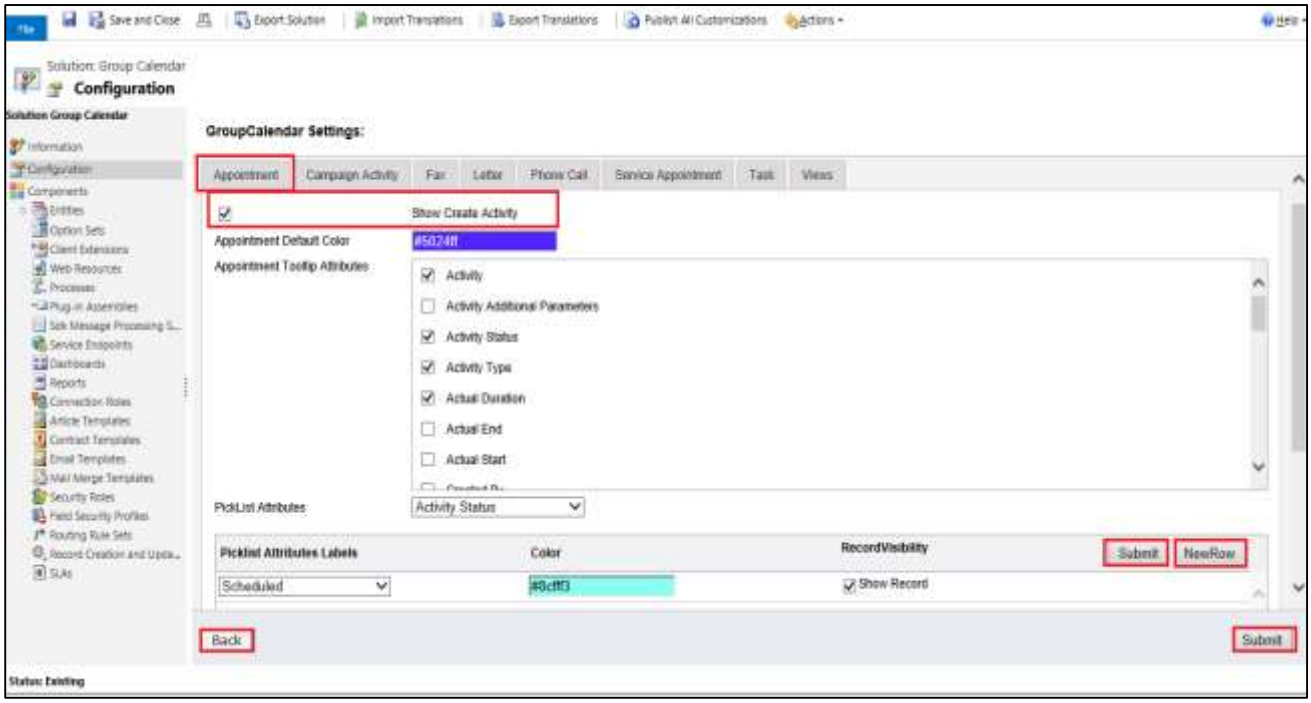

Figure 33: Show Create Activity

There is 'show create activity' check box in each activity setting area, put 'show create activity' checkbox as checked and save settings then activities will appear in right click menu [right click on group calendar screen to create new activities].

- Your choice of Activity can be selected by clicking on the Show Create Activity Tab as shown above
- Activity Color – User can select his/her personal choice of colors for every activities (one or more colors as shown above)
- Tooltip Attributes – User can select the one or more Attributes for which he/she need the tool tips for display purpose.
- Pick list Attributes can be selected from the Drop down list provided
- Pick list Attribute Labels can be added with choice of Color along with display of its record visibility.
- Once selected, Click on Submit to continue or Click Back to go back to Settings menu

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Group Calendar Entity Selection

- Facility to choose different color for record based on pick list attribute values.
- Open CRM go to Solutions, Double Click on Group Calendar Solution
- Select Configuration section on the pop up screen as shown below

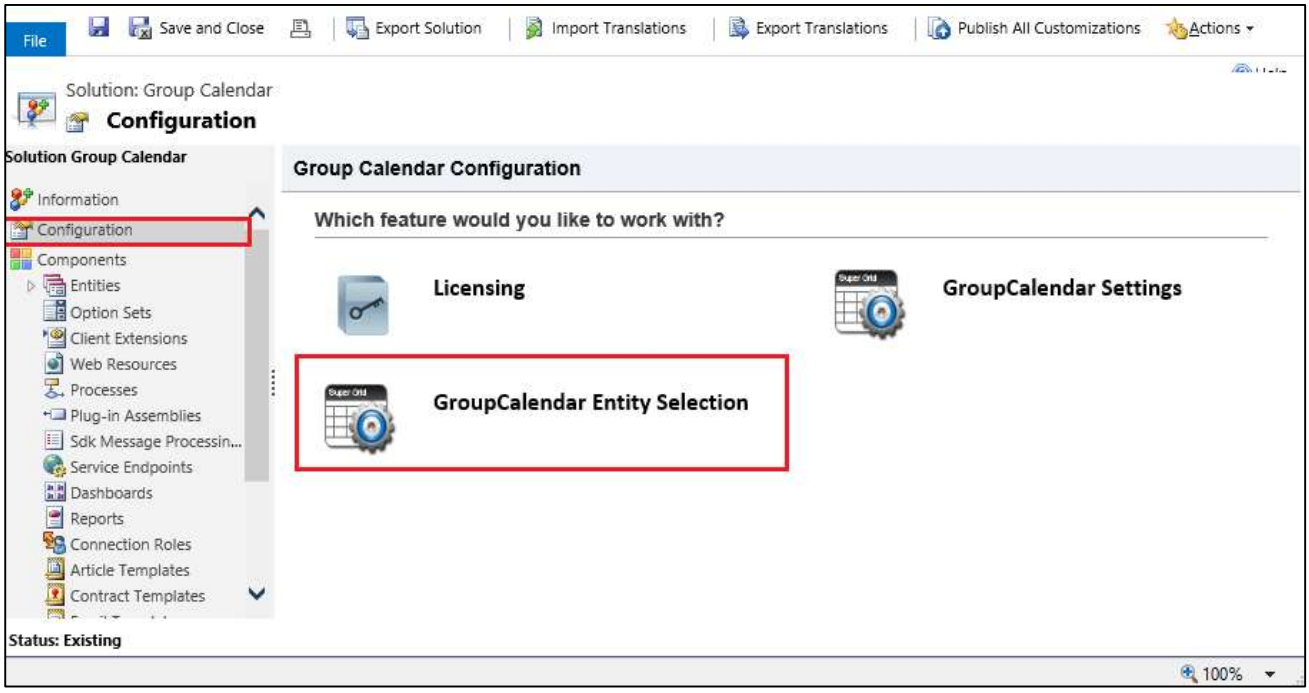

Figure 34: Configuration Screen

- Click on Group Calendar Entity Solution to open one more pop up screen as shown below.
- User can select the entity, color and tooltip attributes.
- That entity records also visible in calendar.

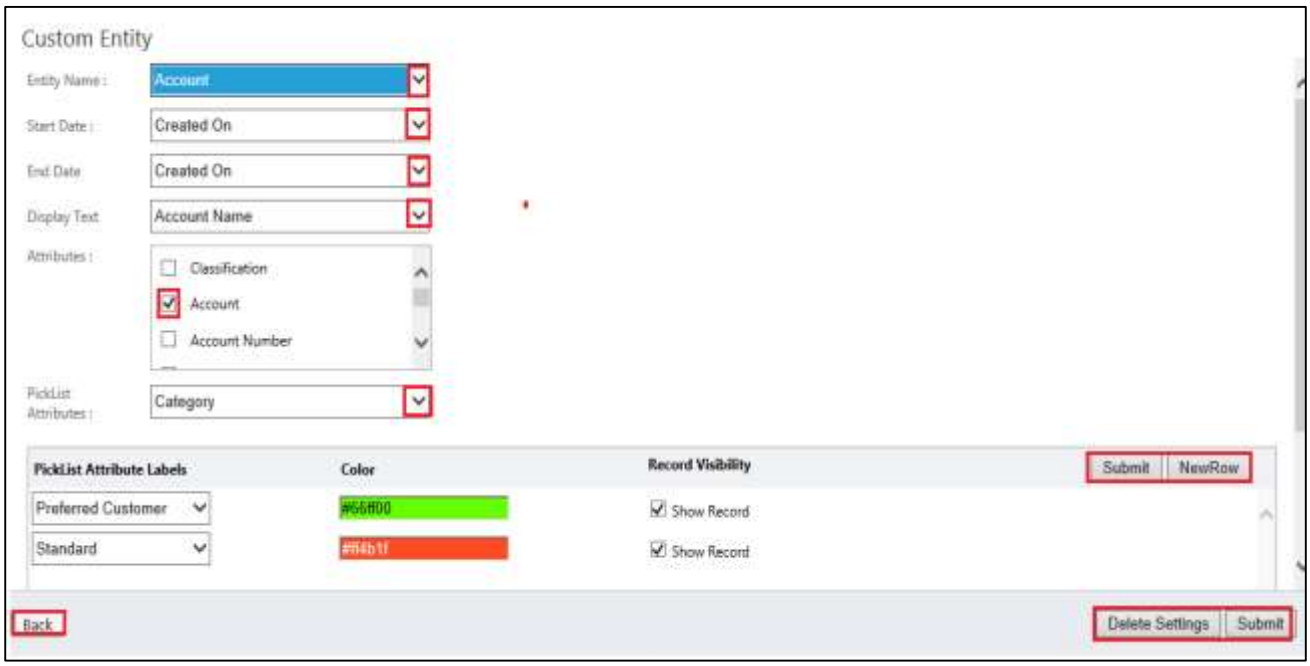

Figure 35: Group Calendar Entity Selection

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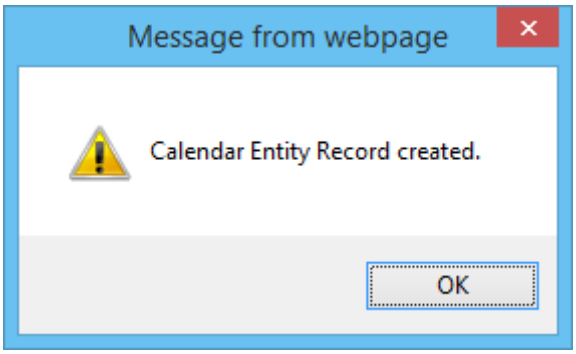
- Select Entity Name from the Drop down list provided
- Select Start date & End date separately from the drop down list
- Select the Display text from the drop down list
- Select the Check box in the Attributes to get tool tip help for the selected entities
- On the Color, click to change to get desired color for the Entity display.
- In Pick list Attribute labels area, user can add attributes by clicking on New Row tab provided.
- Finally click on Submit button (placed on the right bottom corner) to execute.
- On successful submit a new pop up displays the following message.



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Multilanguage Support

This Group Calendar Add on is made to work with all languages across the globe. This enables to user to use their CRM in their local language as desired. This Multilanguage facility can only be created by a person who has the rights as an Administrators. An individual user cannot change the language settings. Once the language settings is done, every time when a user opens his CRM it automatically by default opens in their local language only.

- Open CRM→Menu→Settings→ Administration

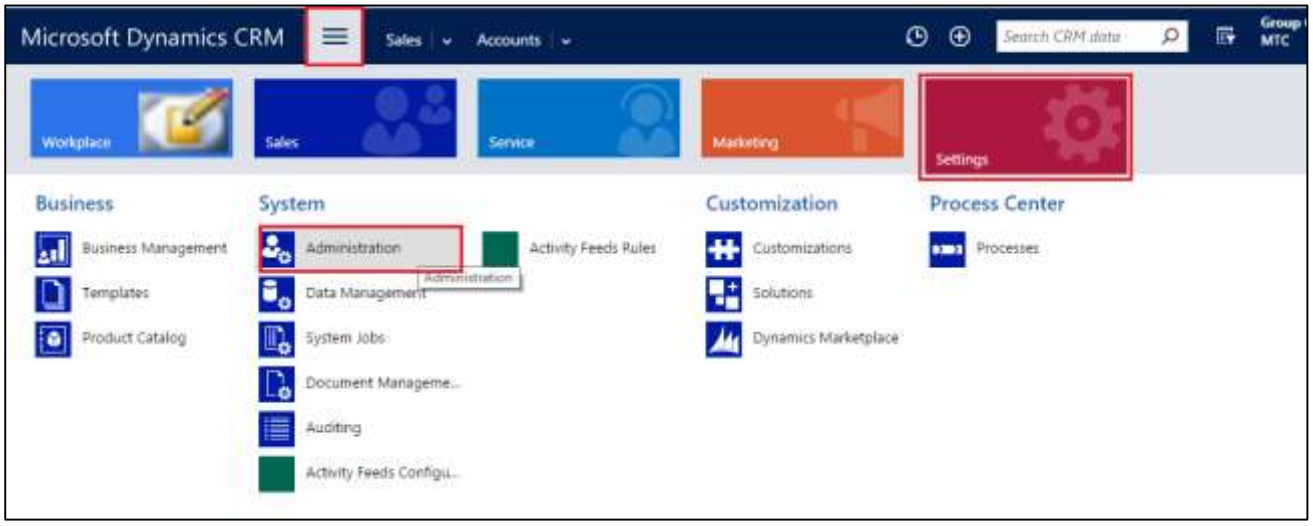

Figure 36: Main CRM menu

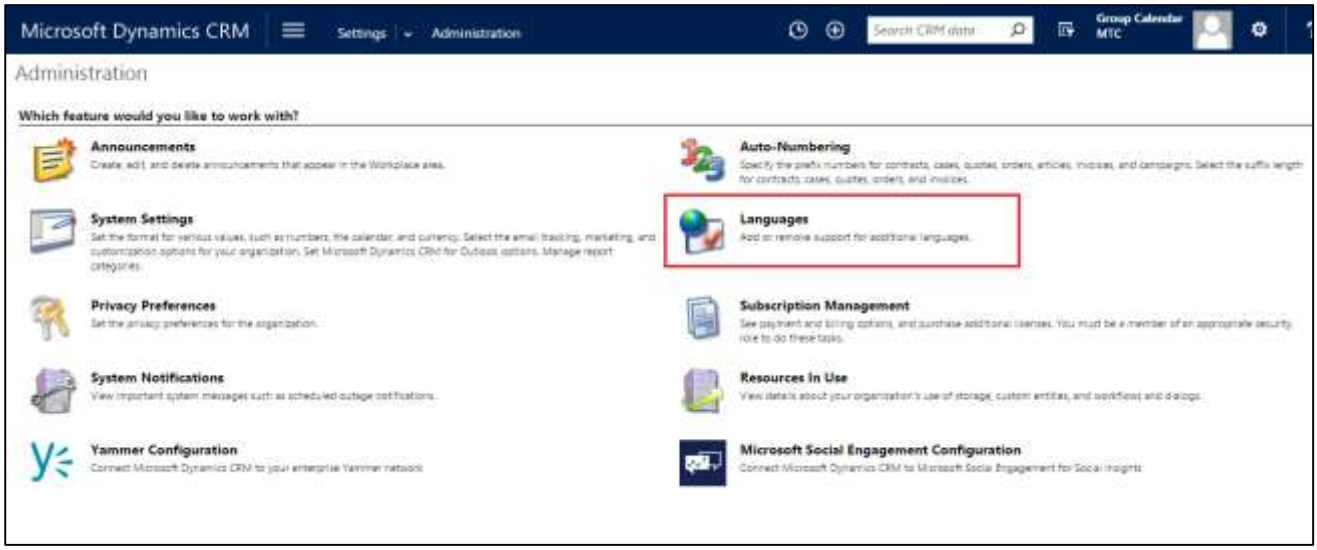

Figure 37: CRM Administration screen

- Click on Languages as shown above
- Import the languages from the Excel sheet provided with the Solution for the display of Alerts in local language.

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- Finally Click Apply to save the changes

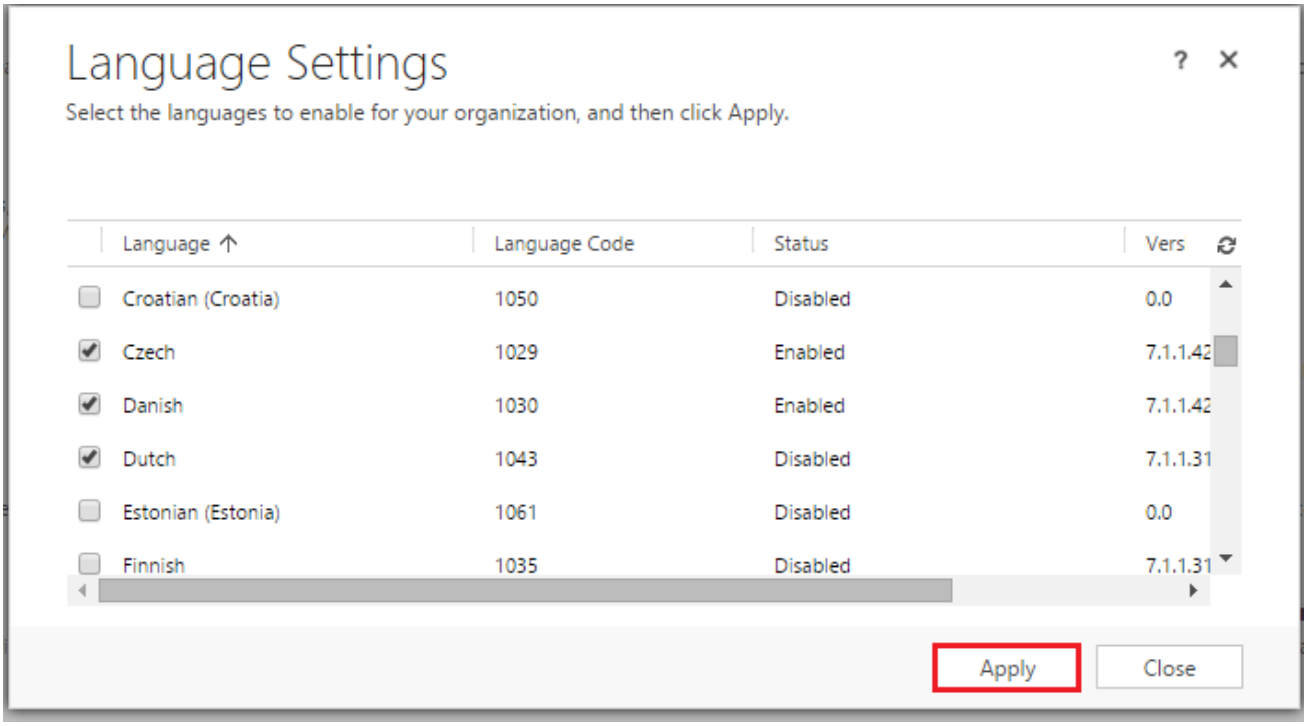

Figure 38: Language Setting Screen

The above procedure is only for the Administrator to set the Languages as desired.

Multilanguage Support for Users.

- Open Group Calendar

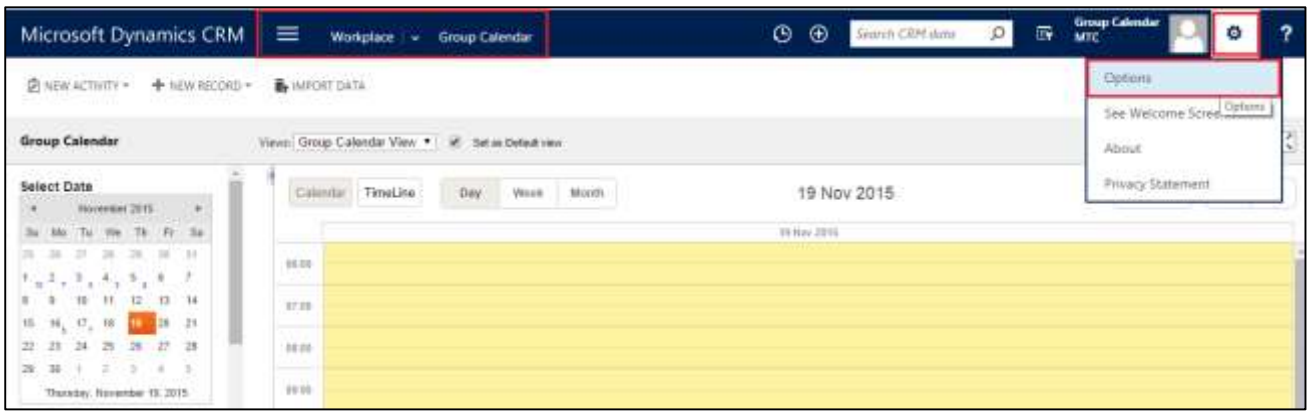

Figure 39: Group Calendar Screen showing Settings

- Click on Settings which is at Top right Corner as shown above
- Click on Options to open a pop up window as shown below

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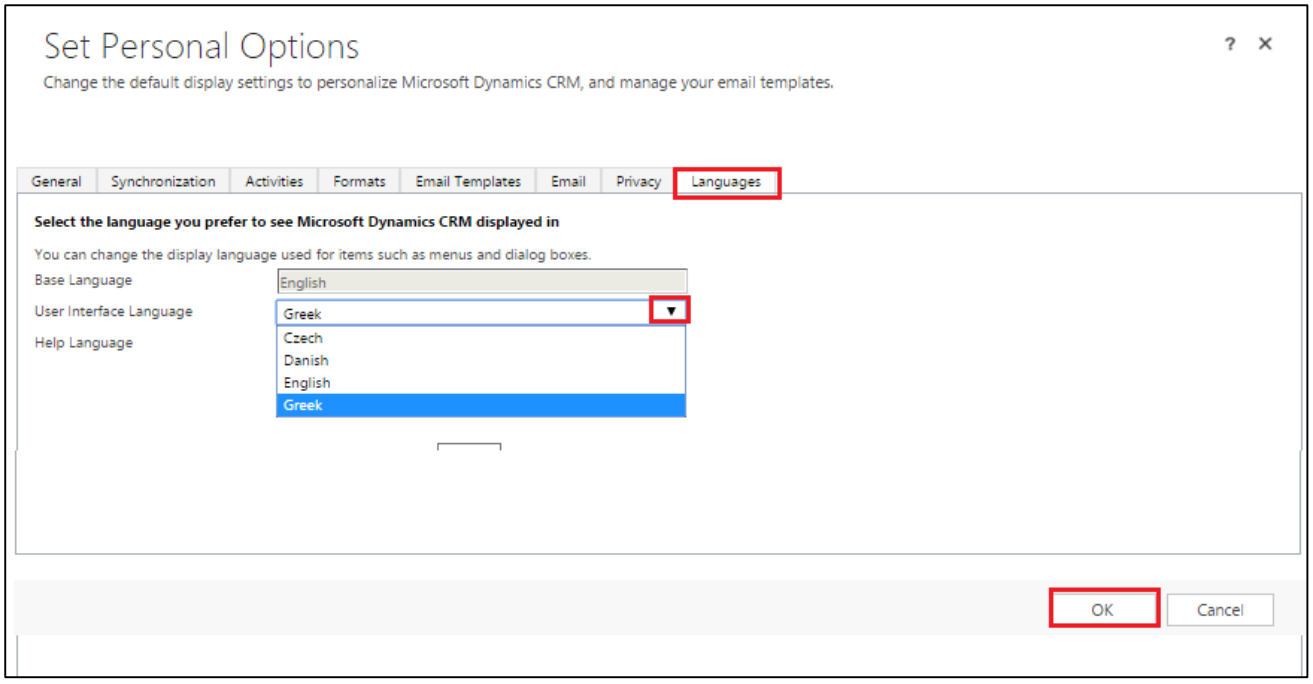

Figure 40: Set Language Options

- Select Languages Tab
- The Base language is set to English
- Select the User Interface Language from the Dropdown list provided (User's local Language)
- Finally click OK at the bottom of the screen.

Just for an example we have selected the language as Greek and saved it. Hence the display for the users will as shown below.

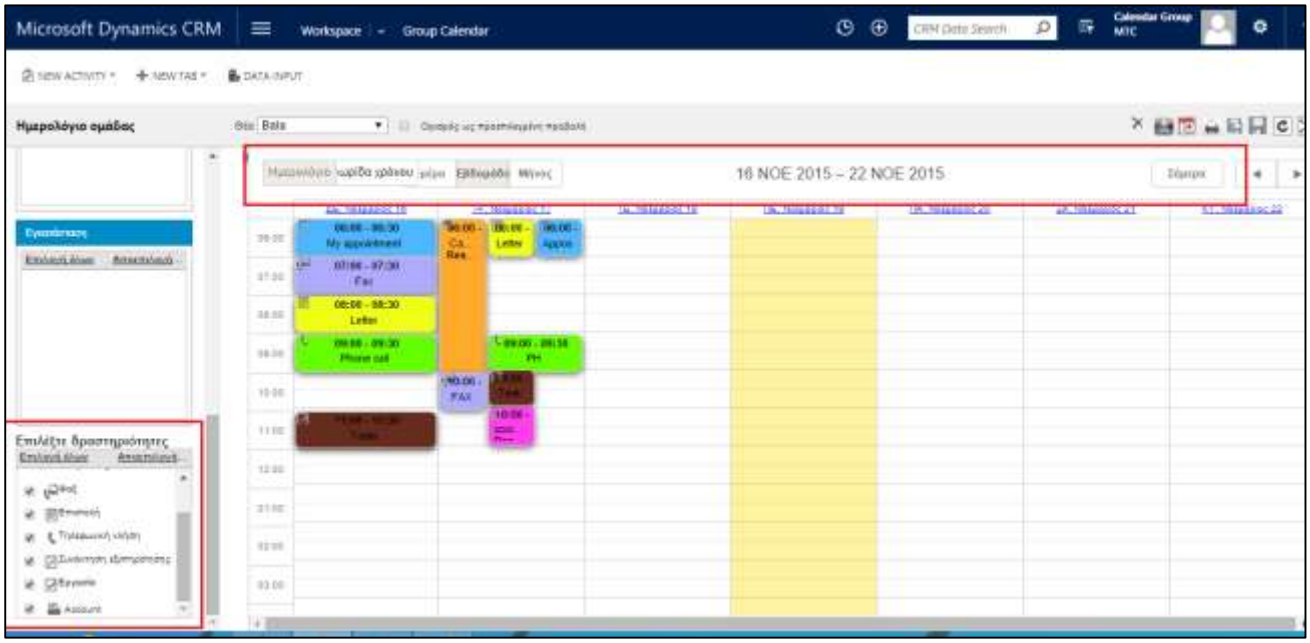

Figure 41: Group Calendar shown in Local Language

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- All the Displays are shown in selected language only.
- Even the Activities and all others on the left pane are also in local language.
- The data for the Calendar which is created in English Base language earlier is displayed in English only. But the Data (Activities) created in local languages are displayed in local language only.
- Even if the users log out of the system and when he opens the same again it is by default shown in the local language already selected and stored.

Import XML file for language Alerts

- Open CRM→Workplace→Extensions

- Click on Labels Language to open the page

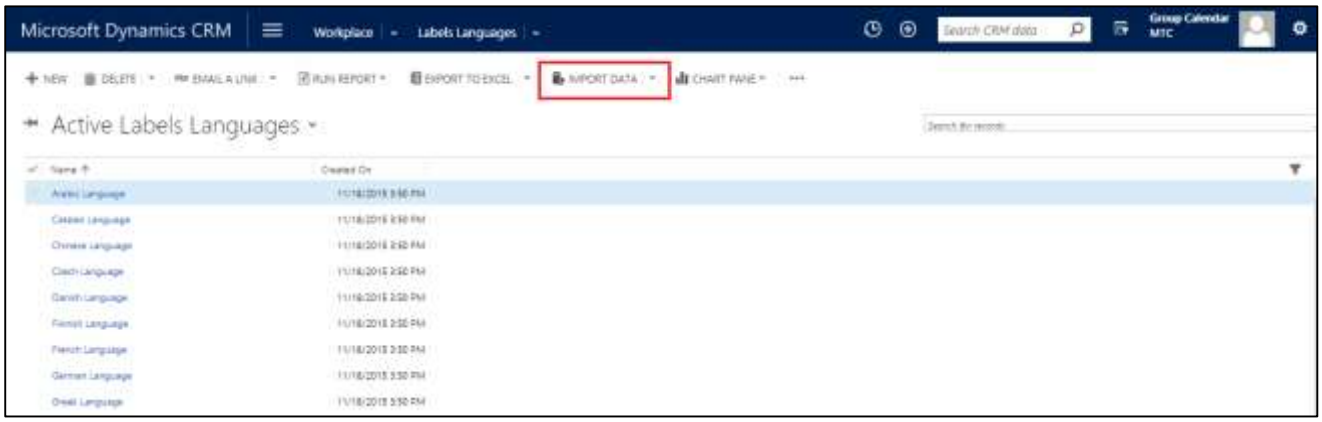

Figure 42: CRM displaying Active Label Languages

- List of all Active label languages are shown.
- Click on Import Data
- Choose File (XMl file – provided with the solution for language alerts)
- Click on NEXT to continue till end as shown below.

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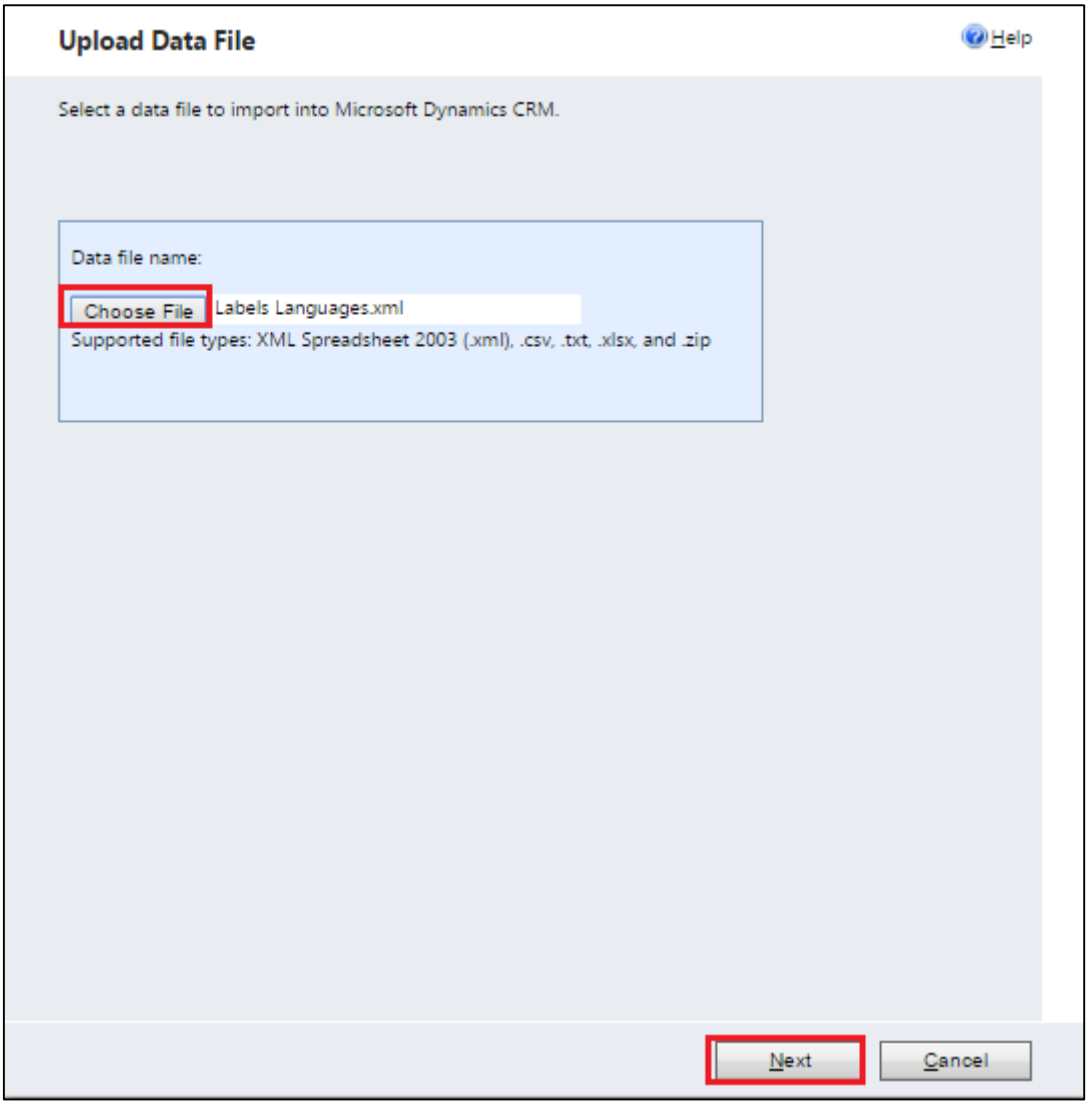

Figure 43: Importing XML file for alerts

- Refresh the CRM you will see all the Languages added to the existing list
- Since we have selected Greek Language earlier, Select the Language from the list and click to open

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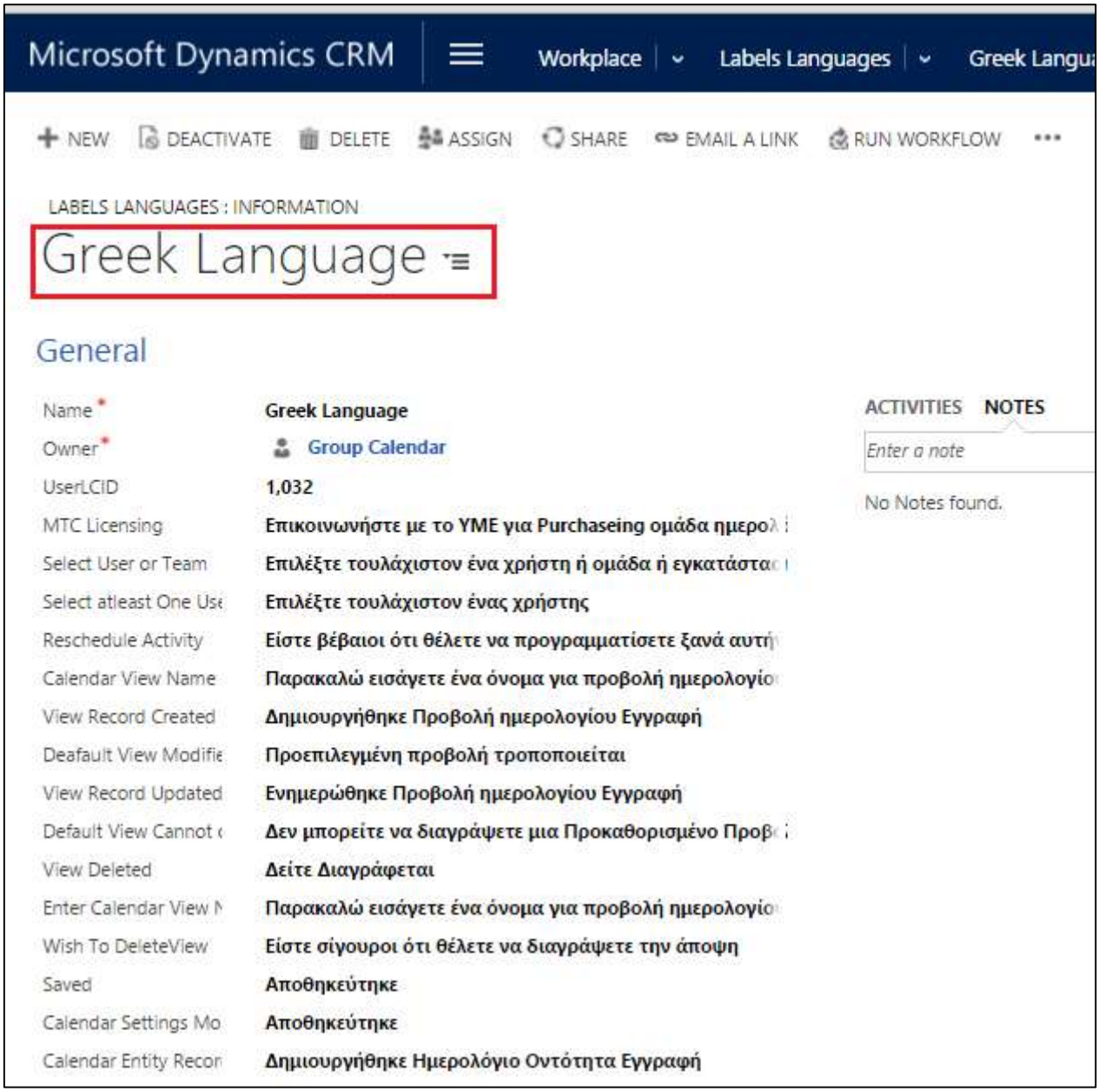

Figure 44: Label language information

- All the alerts are displayed in English and Greek language

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Group Calendar Functionality

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

- Only registered Users or internal users in the CRM will & can have Group Calendar facility
- Single or multiple user facility is available in Group Calendar

Open CRM Go to **Workplace->**

Figure 45: CRM Dashboard

Go to **Group Calendar** to view existing calendar as shown below

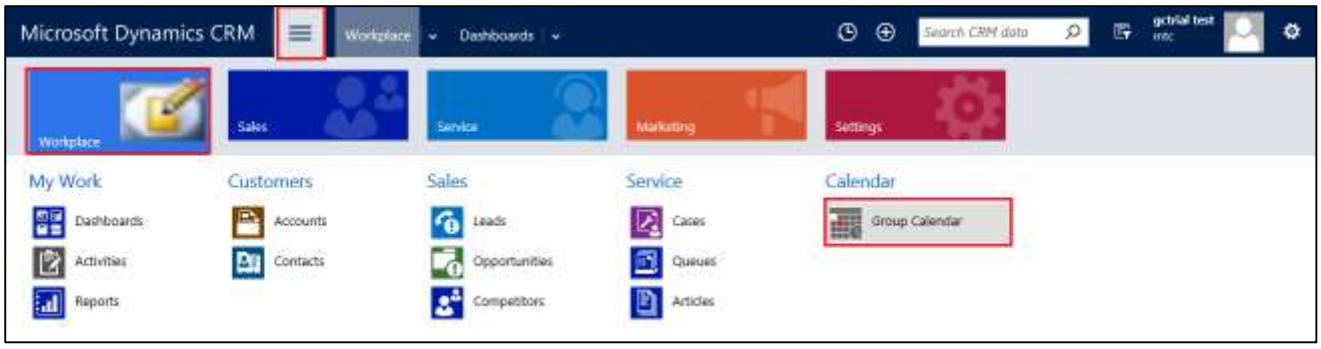

Figure 46: CRM Dashboard... cont.

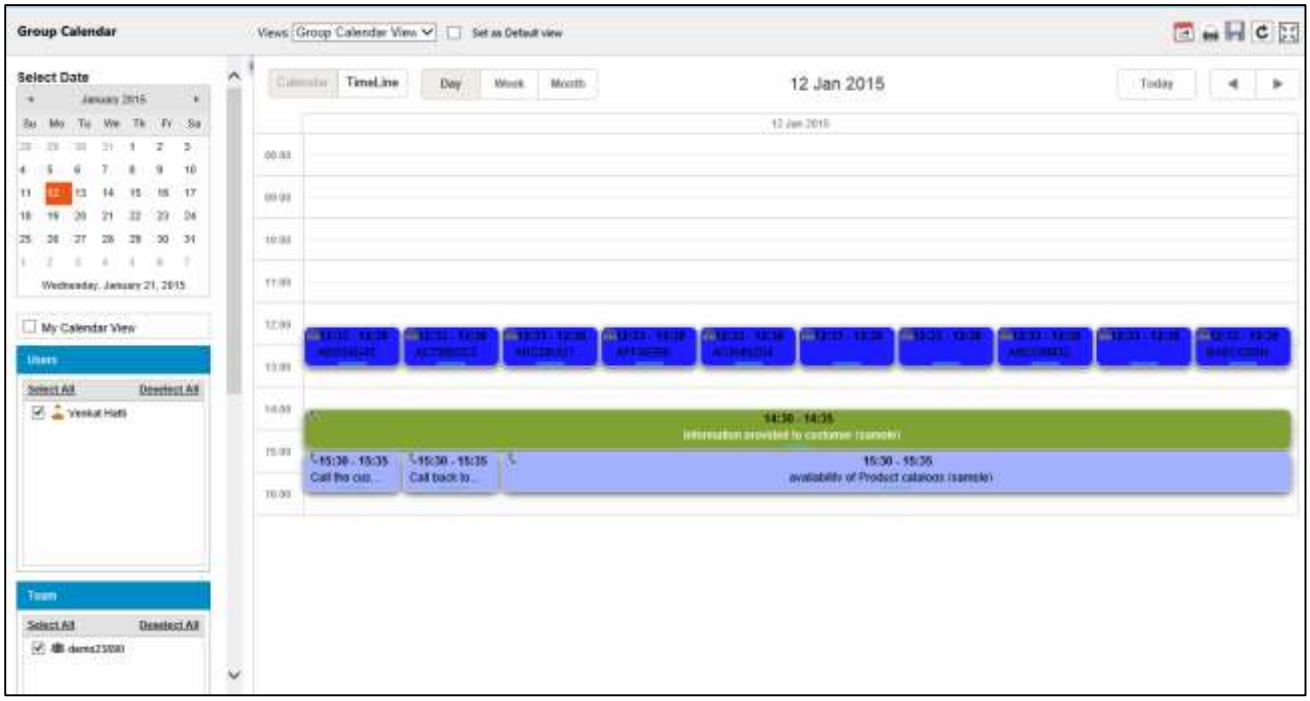

Figure 47: Calendar view - CRM

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- The working pane has Date Calendar on top, User list in the middle and Activities list at the bottom.
- The right side of screen displays the Calendar with activities details
- To View the Calendar Select the Users from the User list by selecting the check box
- Only the users in the CRM are listed in this list
- In the above screen both the users have been selected hence all their tasks are displayed
- To create a new Activity, double click on the date
- New pop up window opens as shown below
- Select the Activity from the drop down list and click on Create Activity
- To move the Activity just Drag and Drop it in the required place

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 Group Calendar.

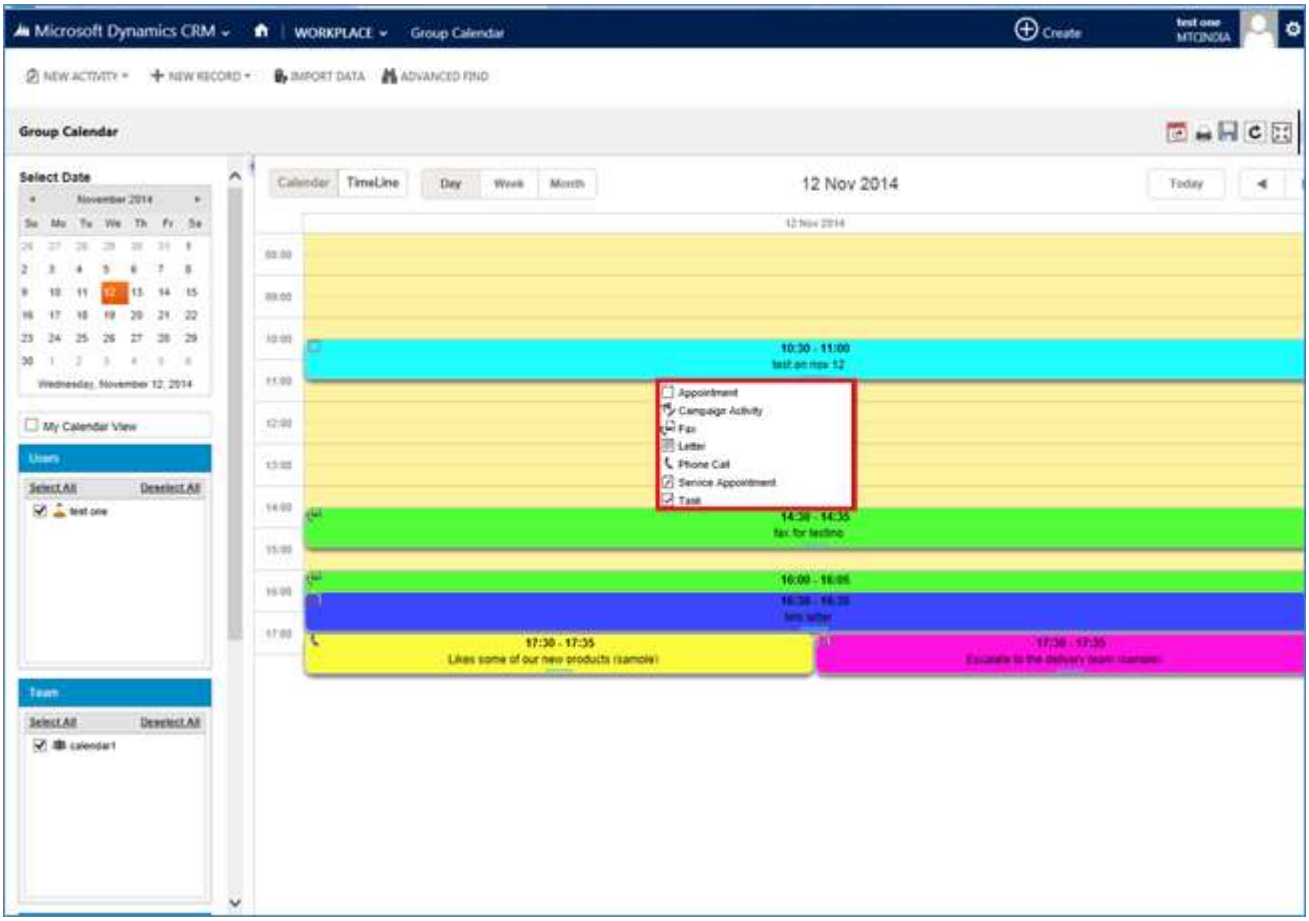

Figure 48: Create Activity

- 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 from the left pane
- Calendar Date
- If the user is interested in his own calendar then select My Calendar View
- If the user wishes to view Individual user(s) then select the users as shown below
- If the user wishes to see the team calendar then select team from the list

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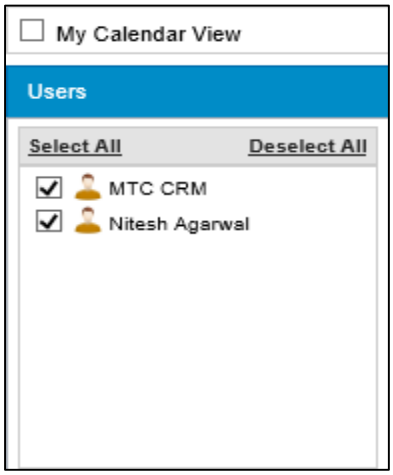
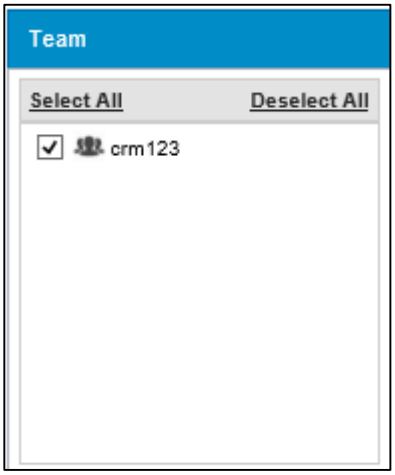
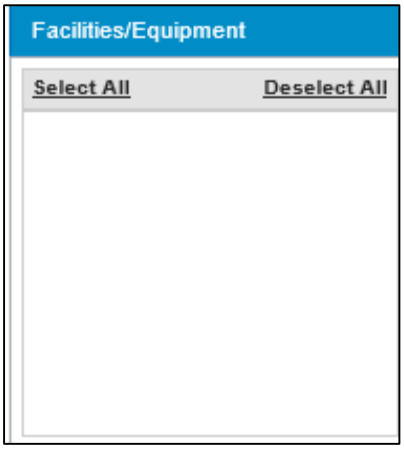
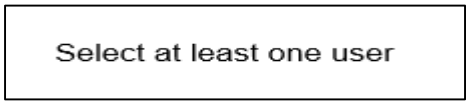




- If the user wishes to see the Facilities/Equipment from calendar then select team from the list
- Lastly select one or more Activities from the list to view calendar pertaining to your choice



- Select Users – Either you can select one or more users or Select All or even Deselect all for easier selecting options. (as shown below)
- In Select Users: - if the user deselect all then a message is displayed as "**Select at least One User**". Which mean at least one user has to be selected to view Group calendar.



- Apart from Both Users and Team you can also check MY Calendar View to get your own calendar details.

Views & Default View:

- Select the Check box to Set the Calendar for Default View

- Views have a Drop down list, click on the button will show user as under (if there are any stored views available)

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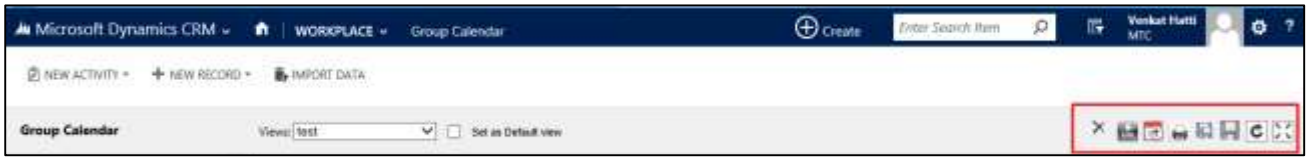
- Apart from the regular Group Calendar View, if you select any other previously stored view (for example here test calendar) the User will have additional three more icons extra such as

Save as New file

Copy URL of the present calendar

To Delete View



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

This icon on top right is to save calendar view for example on click of this icon a small pop up display as

Where you can give the name and create it.

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

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

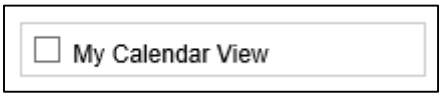
This image indicates that the Calendar can be exported out of CRM

This image when clicked helps in taking the Printout (output) or Hard copy of the calendar

(***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.

On the left pane below the actual calendar you will notice the following



All Activities shown in Green color indicates that a particular activity is Closed or Finished

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Working Hours

To set the working hours for users, you need to define the working hours as shown below

- Click on which is placed on Right side of the Menu bar.
- Click on Option to get Set Personal Options pop up window.
- Select Activities tab

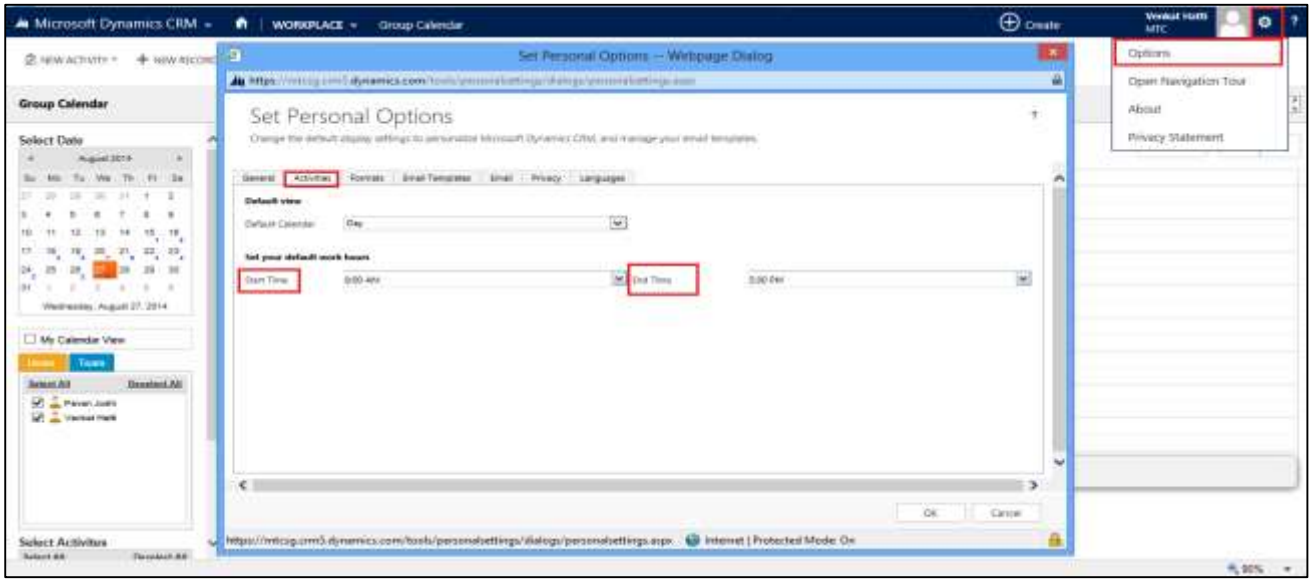
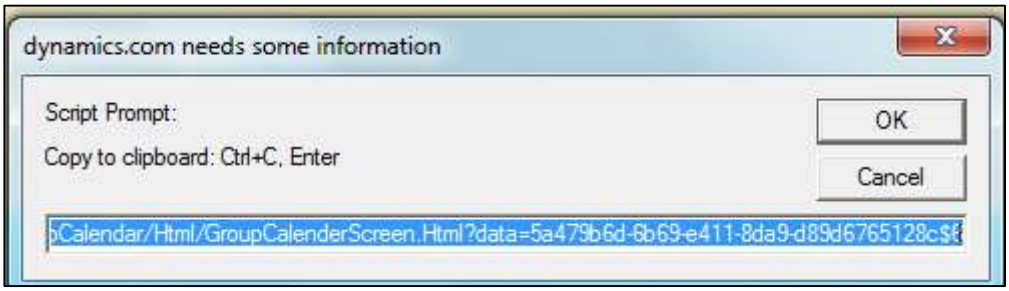


Figure 49: How to Set Working Hours

- Default Calendar: Select Day, Week or Month
- Start Time and End time: Select from the Drop down list provided
- Finally Press Ok to Confirm and Continue



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My Calendar View

- On Selecting My calendar- the calendar is restricted to single user (the one on whose credentials the user has logged in). Select Users Options gets disabled. Otherwise the user can see activities for all the users.

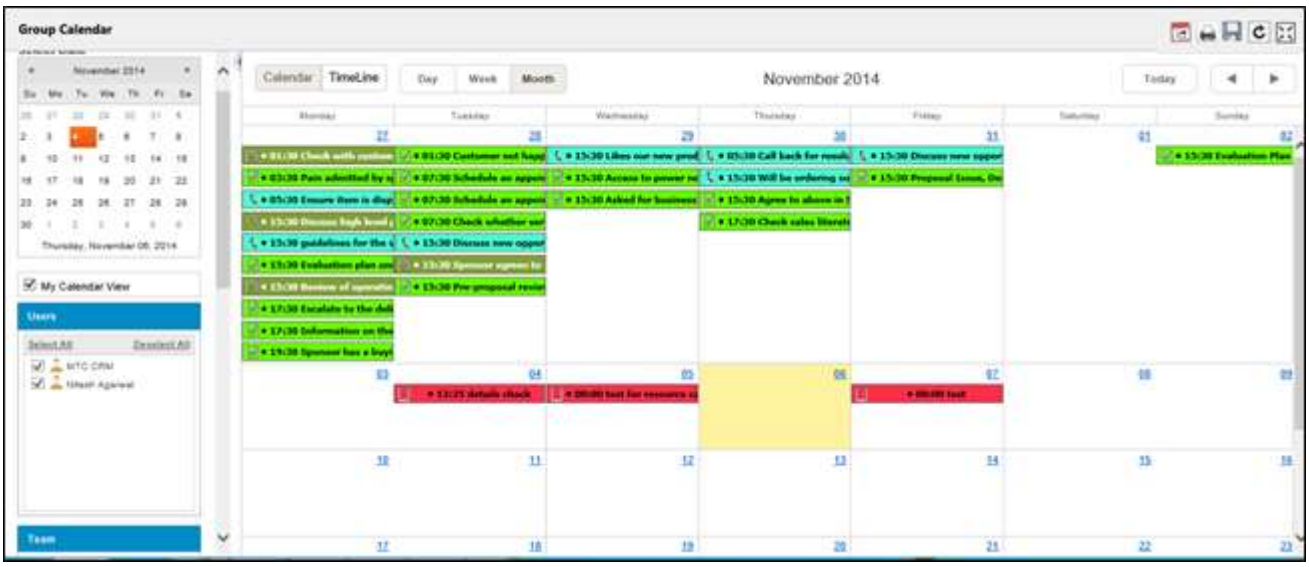

Figure 50: My Calendar View

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Calendar View - Monthly (Single User)

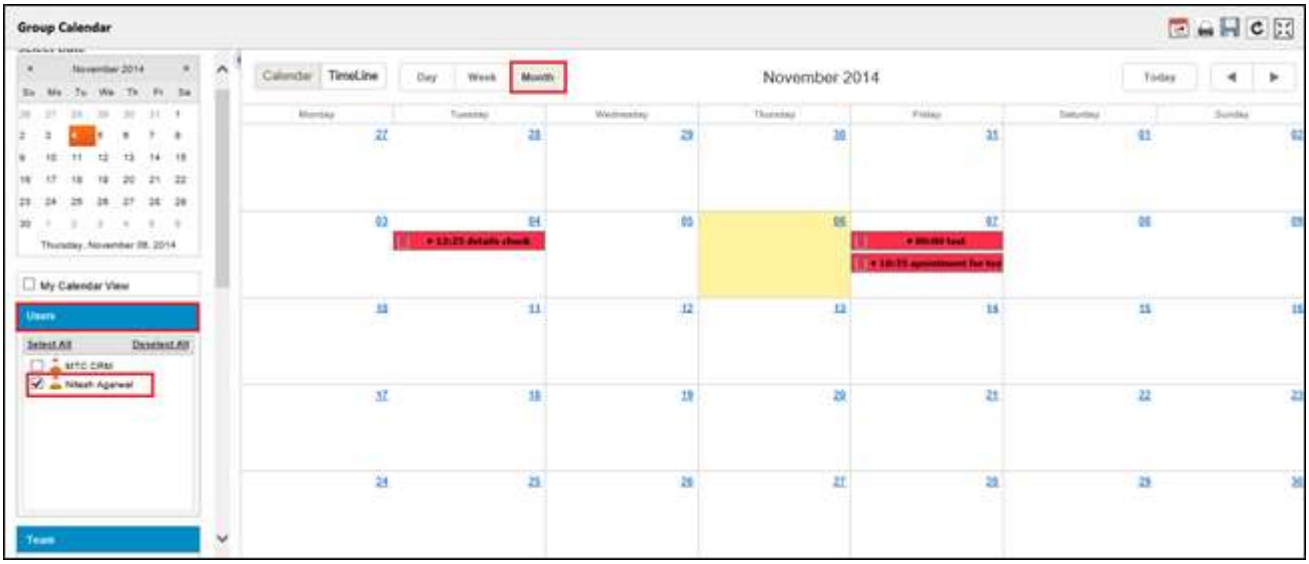

Figure 51: Calendar View - Monthly (Single User)

- Only One user is selected in the above view
- Monthly details of all Activities are displayed for a Single User
- All Activities shown in Green color indicates that a particular activity is Closed or Finished.

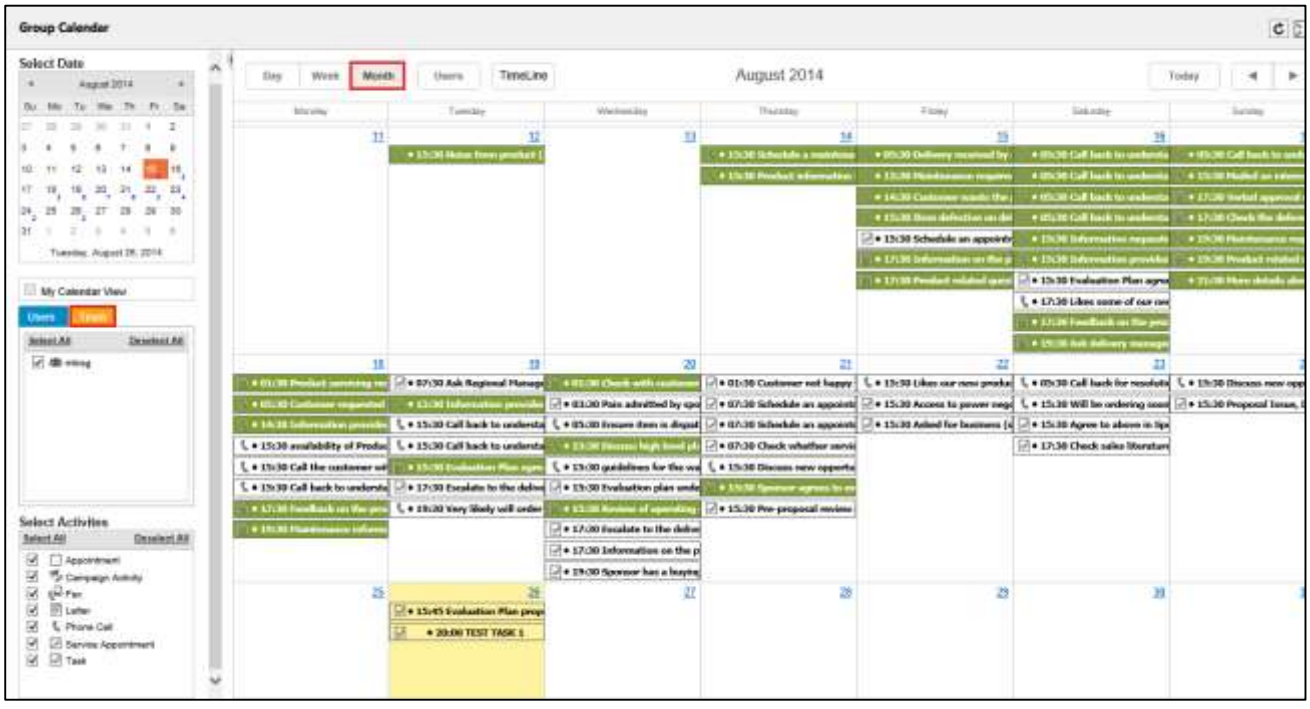

Figure 52: Calendar View - Monthly (Team)

- Monthly details of all Activities are displayed for a Team

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Calendar view monthly - Selected Activities (for multiple Users)

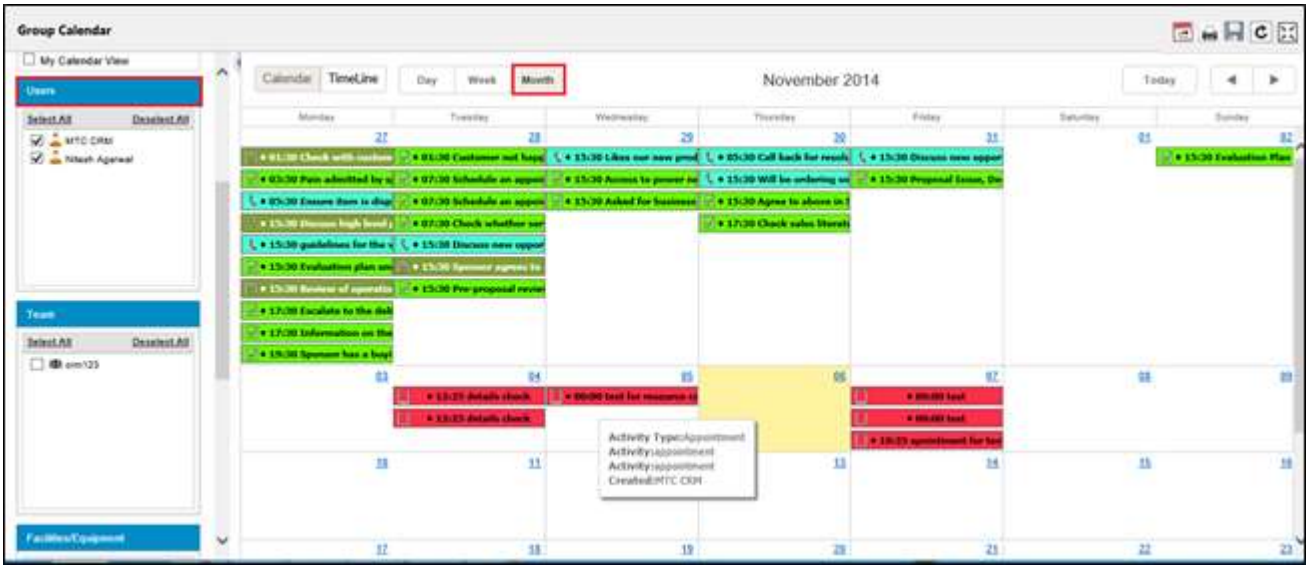

Figure 53: Calendar view monthly - Selected Activities

- All Activities shown in Green color indicates that a particular activity is Closed or Finished.

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

Figure 54: Select Calendar - Day, Week, Month, User Wise or Time Line

Calendar view monthly - Selected Activities (for Team)

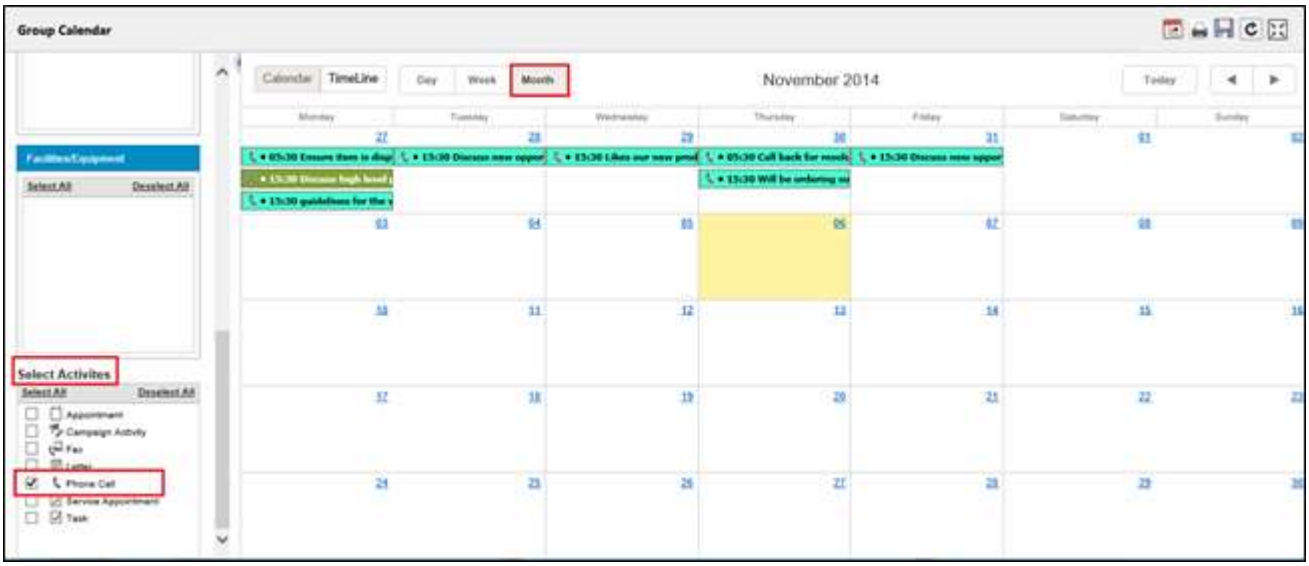

Figure 55: Calendar view monthly - Team Activities

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Calendar view - Week Wise (User wise)

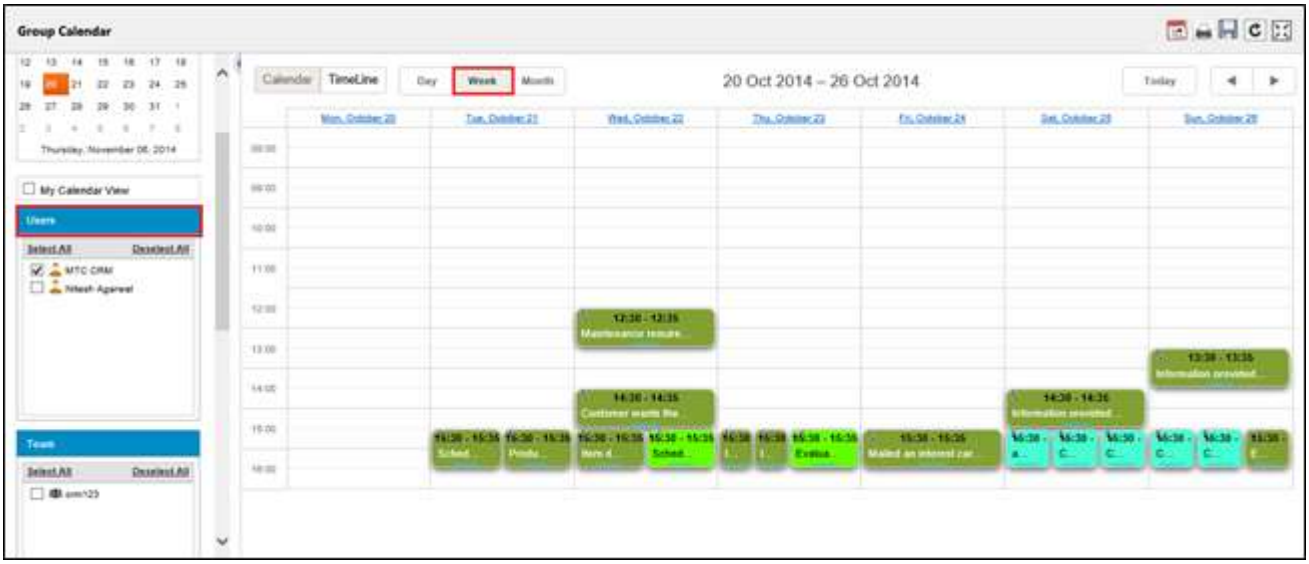

Figure 56: Calendar view - Week Wise

- 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 activities for the Week, user has the facility to scroll up or down to view the record details.
- User can also select My Calendar view or Single User or Multiple Users along with Single Activity or Multiple Activities to view Weekly calendar
- All Activities shown in Green color indicates that a particular activity is Closed or Finished.

Calendar view - Week Wise (Team wise)

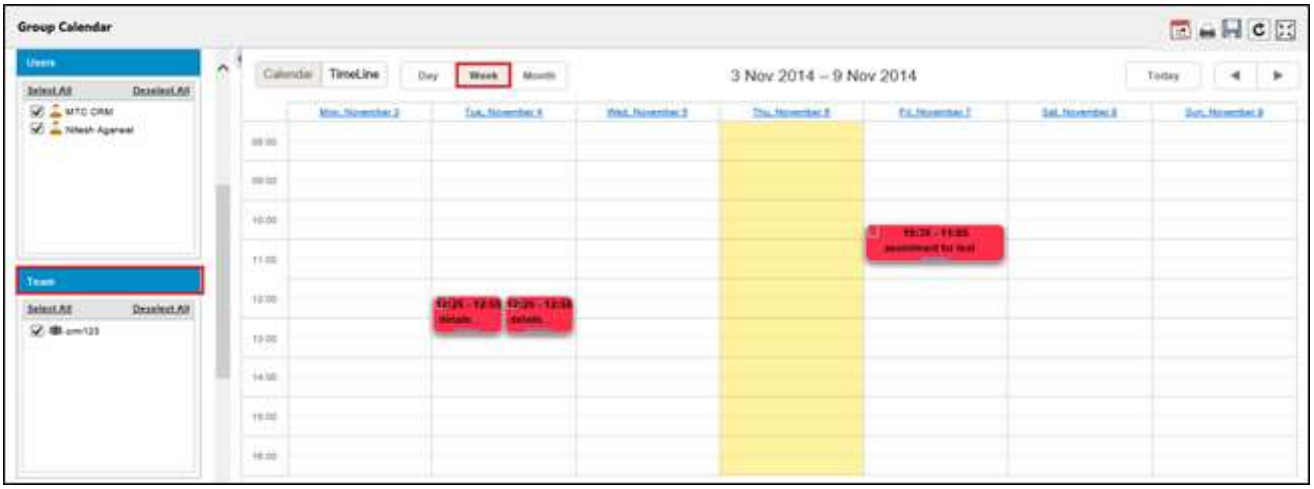

Figure 57: Calendar view - Team Wise

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Calendar View - Day wise (User wise)

Figure 58: 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 activities for the Day, user has the facility to scroll up or down to view the record details.
- User can also select My Calendar view or Single User or Multiple Users along with Single Activity or Multiple Activities to view Weekly calendar
- All Activities shown in Green color indicates that a particular activity is Closed or Finished.

Calendar View - Day wise (Team wise)

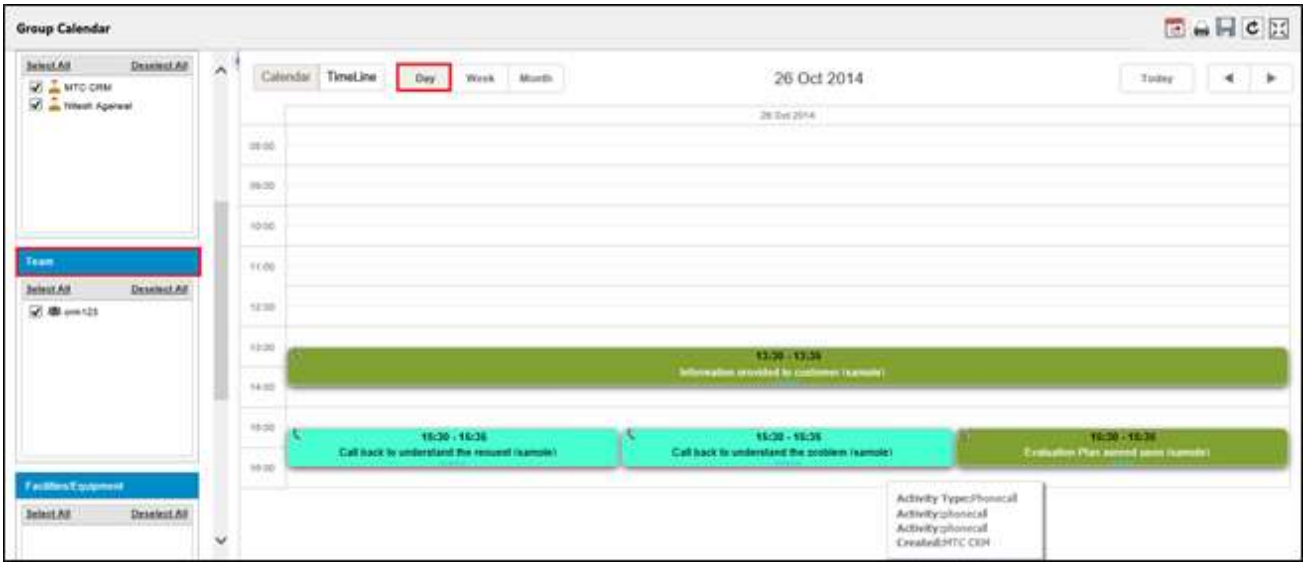

Figure 59: Calendar View - Team

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Time Line View – Day Wise - User Wise / Team Wise

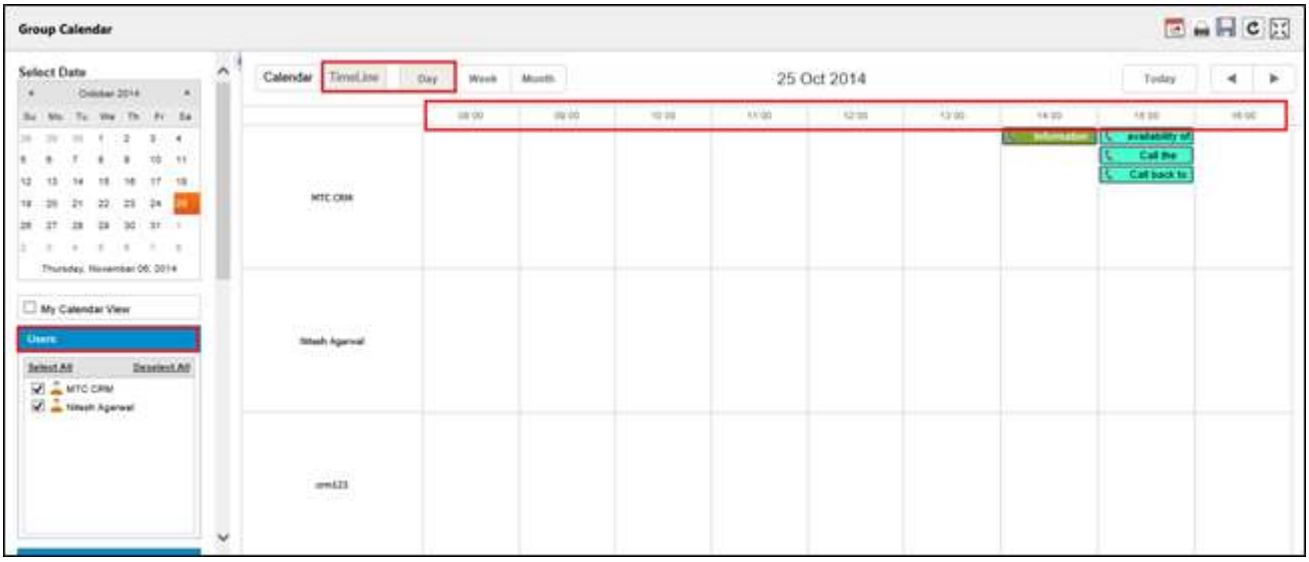

Figure 60: Time Line View Hours wise

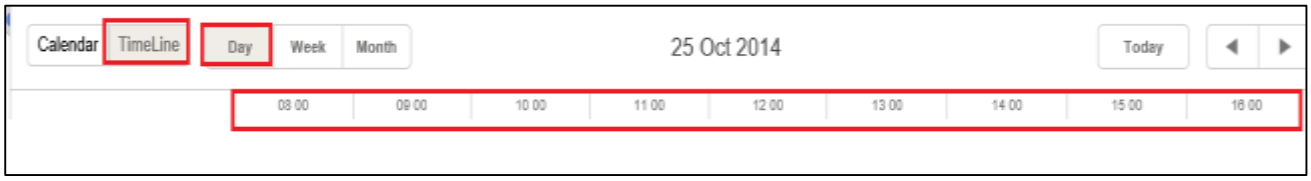

Figure 61: Time Line Hours View Enlarged

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

Time Line View – Weekly View – User Wise / Team Wise

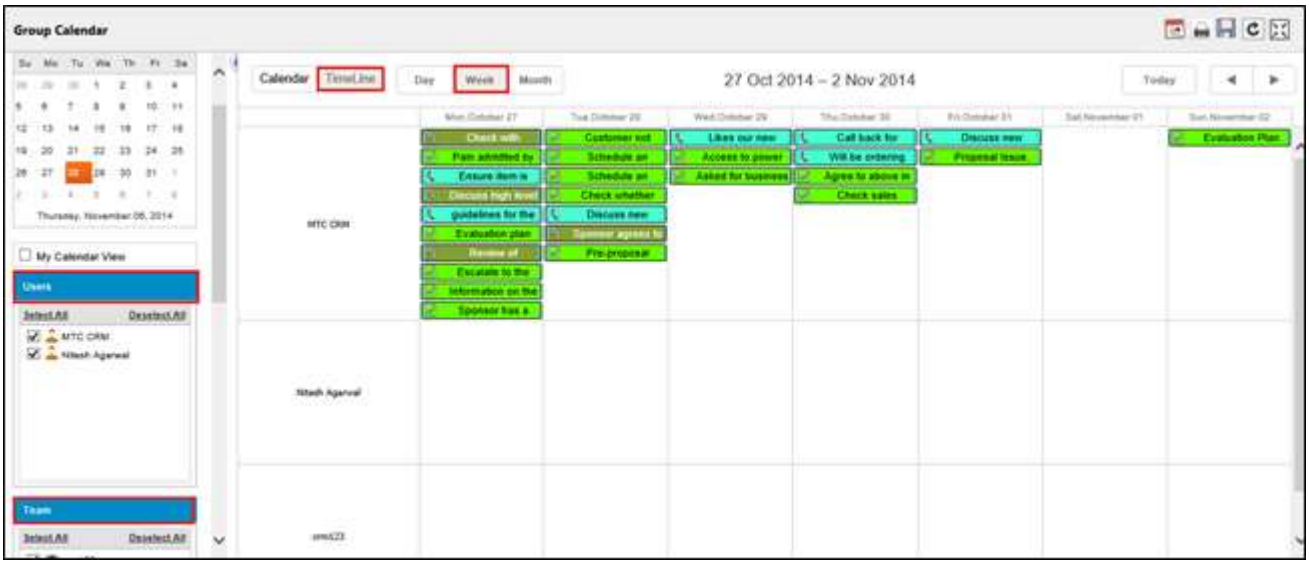

Figure 62: Time Line View – Weekly

Figure 63: Time Line Weekly View Enlarged

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- 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 – User Wise / Team Wise

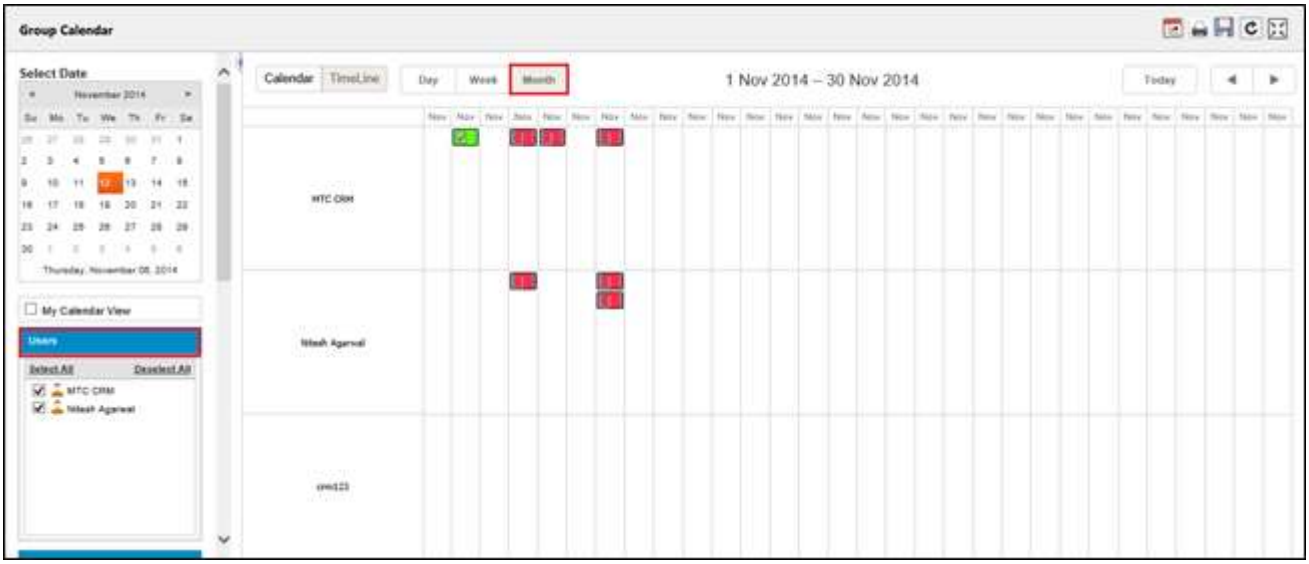

Figure 64: Time Line Monthly view

Figure 65: Time line Monthly view - Enlarged

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

Important to Note

1. User has the option to Select all Users or Deselect users or Select only few which are necessary to view
2. User can select either User wise or Team wise or Facilities wise or combination of these
3. User has the option to Select all Activities or Deselect all Activities or Select only few activities which are necessary to view
4. User can also Select My Calendar View to see his personal details of Activities
5. Apart from the regular view of the calendar user can also have Time Line view of calendar
6. User has option to Drag & drop any activity on the Calendar
7. User can Save or Retrieve any calendar of this choice
8. User can opt to view Full Screen mode also by selecting
9. In all views 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 dragged 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

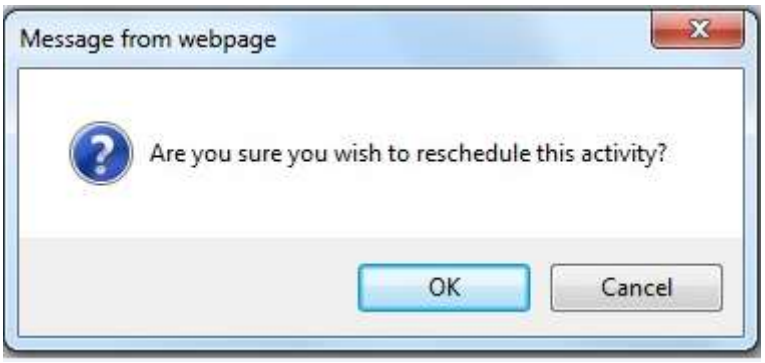

Figure 66: Drag & Drop - Message

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Uninstallation Process

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

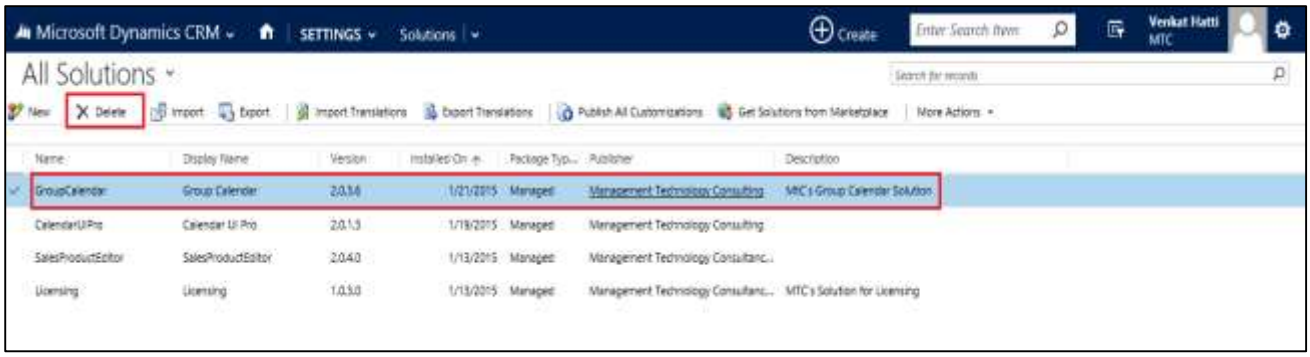

Figure 67 : Deleting Group Calendar Solution

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

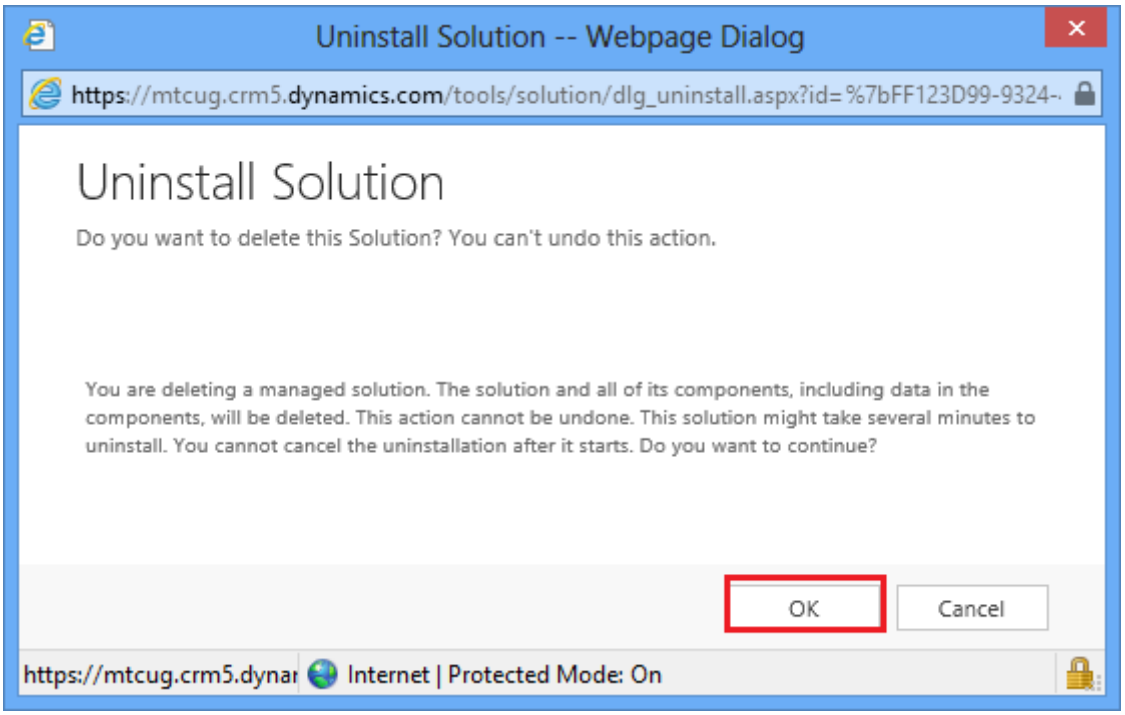

Figure 68: Uninstall Solution

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

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MTC Overview

MTC develops an ever growing and extensive family of add-on products, complete solutions, and core development technologies for the Microsoft Dynamics CRM platform. MTC supports a product development effort with a highly efficient global Microsoft CRM exclusive services business 24/7. MTC's products represent the refinements in functionality, deliverability, and long-term maintainability of unique highly customized Microsoft Dynamics CRM platform business solutions suggested as most important in MTC's global volume customization business. MTC runs its internal operations and many of its partners and affiliates with this example

SMB Custom Enterprise
Componentized Solutions on Dynamics xRM

Small and medium sized businesses (SMB) can now affordably build the kind of enterprise automation system that distinguishes the best unique-line-of-business enterprises on earth. MTC uniquely delivers a very-unique service of clear value to businesses globally seeking automation as a business advantage.

SMB Custom Enterprise is your business's exact fit for a complete low cost business-specific companywide automation solution - marketing to operations to accounting in a closed loop - built on the Microsoft Dynamics XRM platform technologies. Starting with the Microsoft CRM platform in either a monthly Online or wholly owned on premise implementation you choose from a large and growing set of packaged option functionality where you determine what non-standard additional functions you want on this solution, then add them.

For more information on the dozens of integrated products of the "SMB Custom Enterprise" solution set visit: www.MTCCRM.com MTC's low-cost and fixed-rate professional services current rate schedule: www.MTCCRM.com/MTC_Services.pdf.

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MTC is a Microsoft Independent Solution Vender working on Microsoft CRM since the introduction of the platform. MTC's product offerings include development technologies for the Dynamics CRM platform, add-on enhancements of features and major functions to CRM, as well complete vertical-market Enterprise versions as of Dynamics CRM serving an every growing list of industries and organization types.

Microsoft Partner

Microsoft Dynamics CRM

MTC's services are built on a global 24/7 rapid-response and low-cost and fixed-rate ease of engagement. MTC is US headquartered company optimized for low-cost on-demand global engagement with regionalized contacts and a development facility in Hyderabad India adjacent to Microsoft's facility.

The Global CRM Community DynamicsExchange.com

MTC is the founding and managing partner of the Microsoft Dynamics CRM platform Community at www.DynamicsExchange.com. Dynamics Exchange is crowd-source built and dedicated to driving down the costs of implementation and enhancement of the Microsoft Dynamics CRM platform with unique and innovative social networking and knowledge resource allocation processes.

Dynamics Exchange is the leading community free and open to Microsoft CRM uses and professionals for support, training, knowledge, products, and services worldwide.

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