



Microsoft Dynamics CRM / XRM Platform



User Guide



CRM Versions Supported : CRM 2015 and Online

Calendar PRO is a Microsoft Dynamics CRM 2015 is an add-on enhancement that allows organizations to be more joint effort interactive participation by allowing users to Create calendar on any of the CRM entities, Create multiple Calendars for multiple entities & Filters data by CRM fields. Calendar Pro also enables color coding facility.

Calendar PRO is intended for implementation by solution professionals.

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Installation Process

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

STEP 1:

- Go to <http://www.mtccrm.com/Cpro.aspx> click on Download to get Solution.

STEP 2:

- On Downloading you will get **CalendarUIPro_2015** (ZIP file).
- Extract the files from the downloaded folder. You will get two WINRAR ZIP files.



CalendarUIPro_2_0_1_3_managed.zip



Licensing_1_0_3_0_managed.zip

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

STEP 3:

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

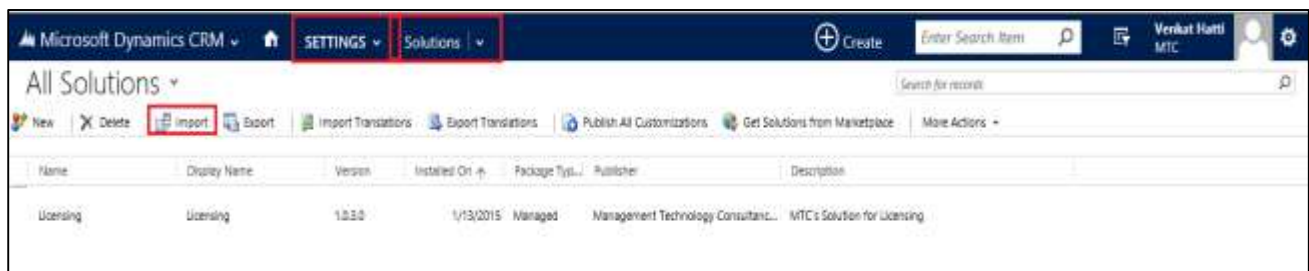
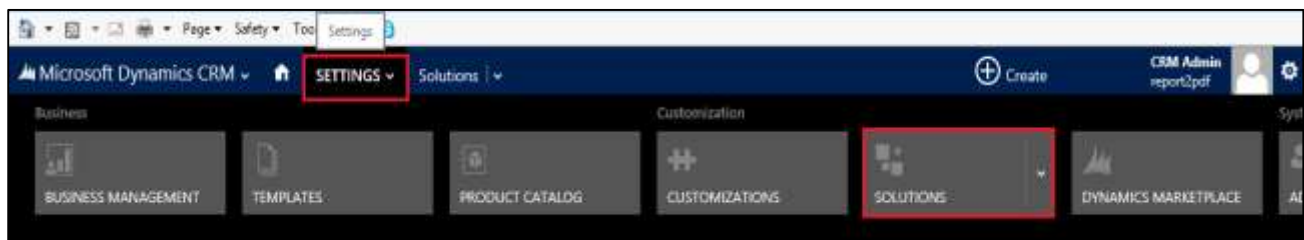


Figure 1: Import Solution

- 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 Calendar Pro Solution

Installing Licensing Solution

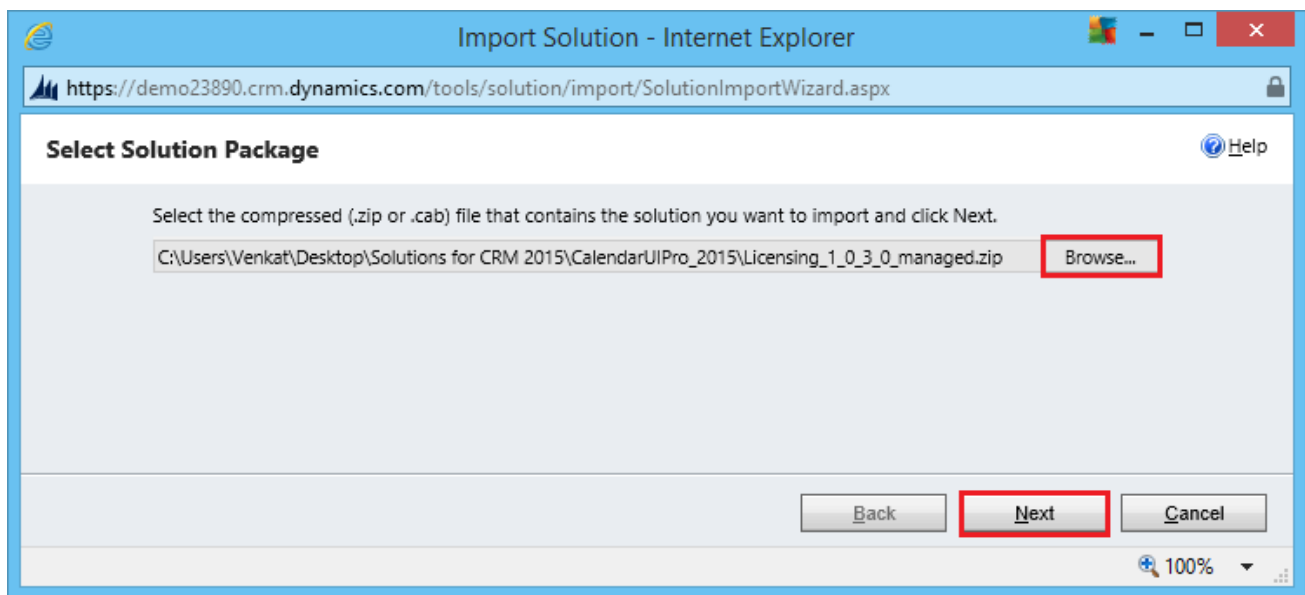


Figure 2 : Select Solution Package

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

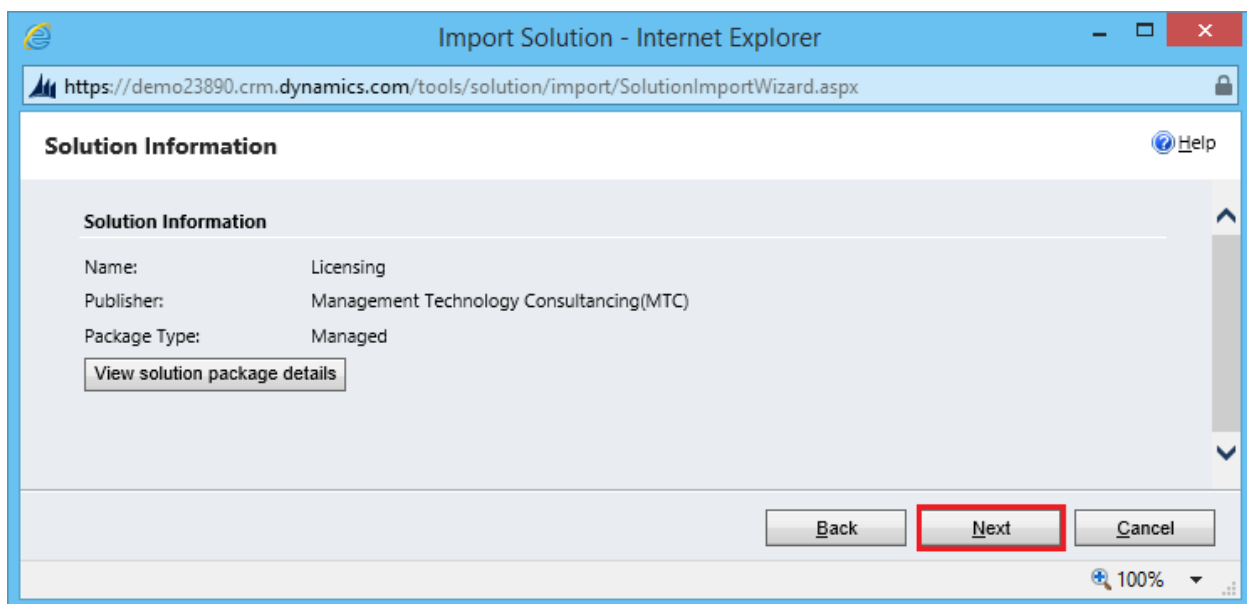


Figure 3: Importing Options window

- Click on Next to proceed

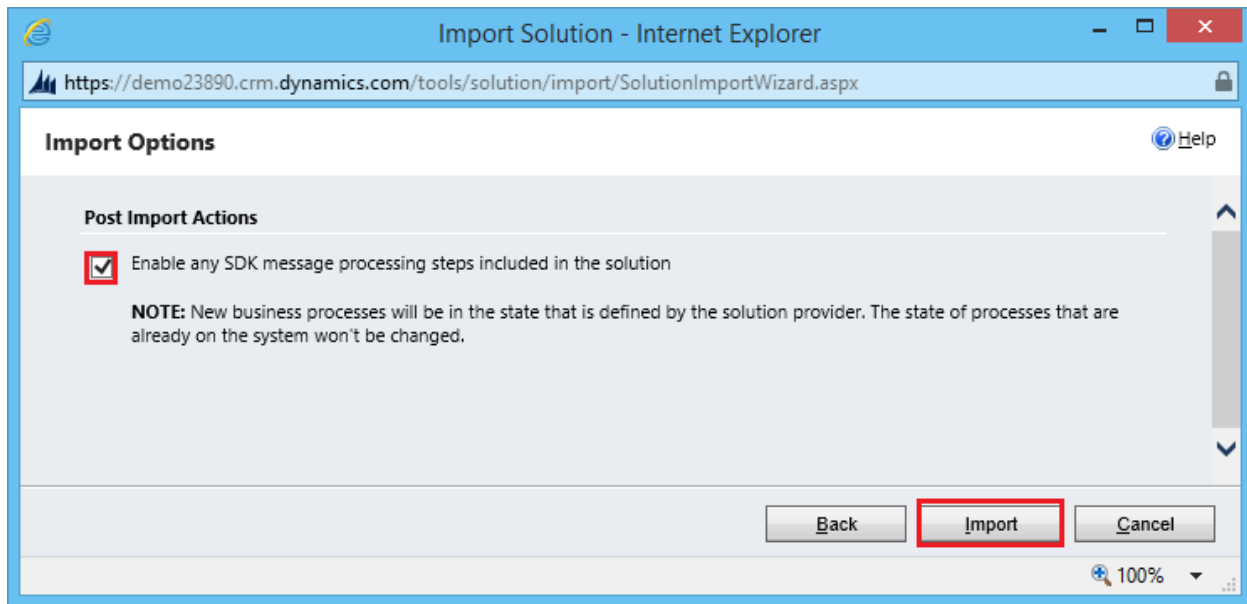


Figure 4: Import Option

- Click on Import to proceed

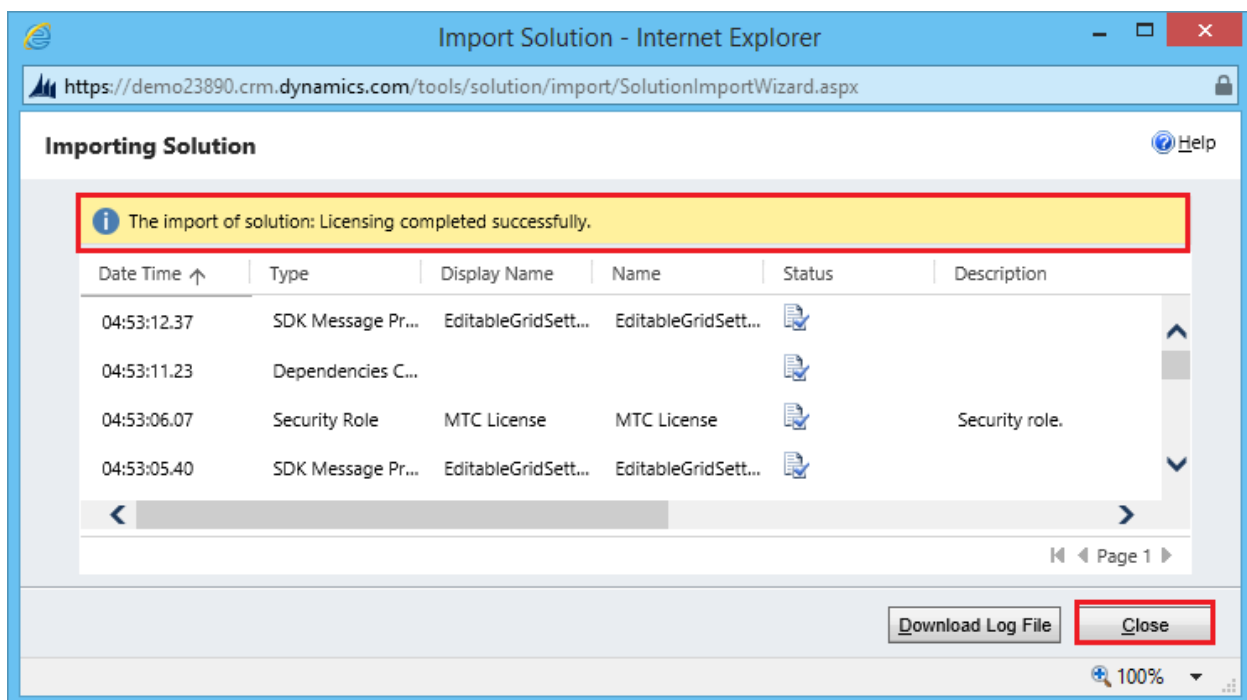


Figure 5: Importing Solution – Licensing

- Click on Close, on successful completion a Message is displayed.

Installing Calendar PRO Solution

- After importing the Licensing solution, install the Calendar Pro Solution also.

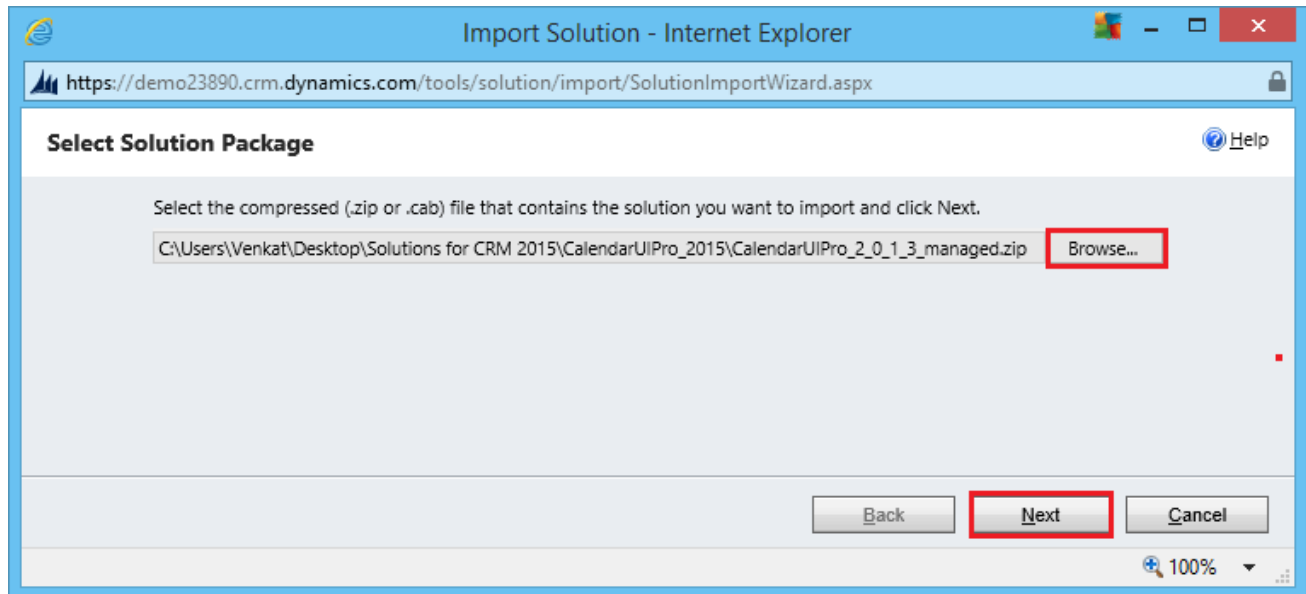


Figure 6: Select Solution Package

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

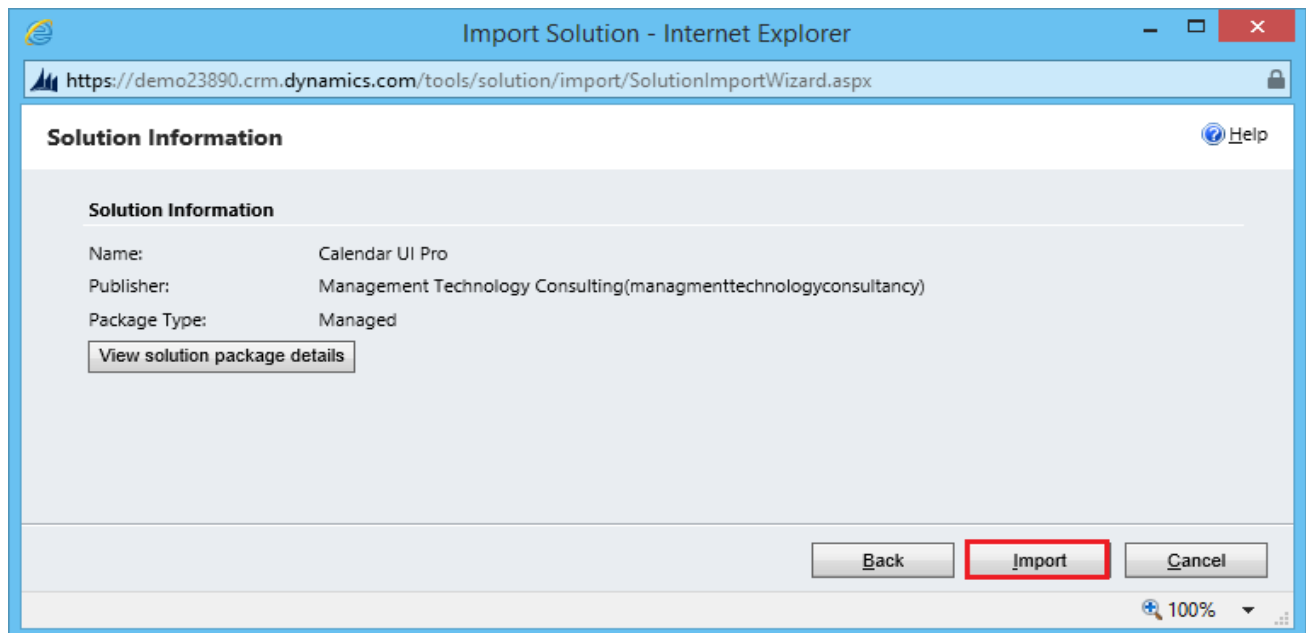


Figure 7: Solution Information

- 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.

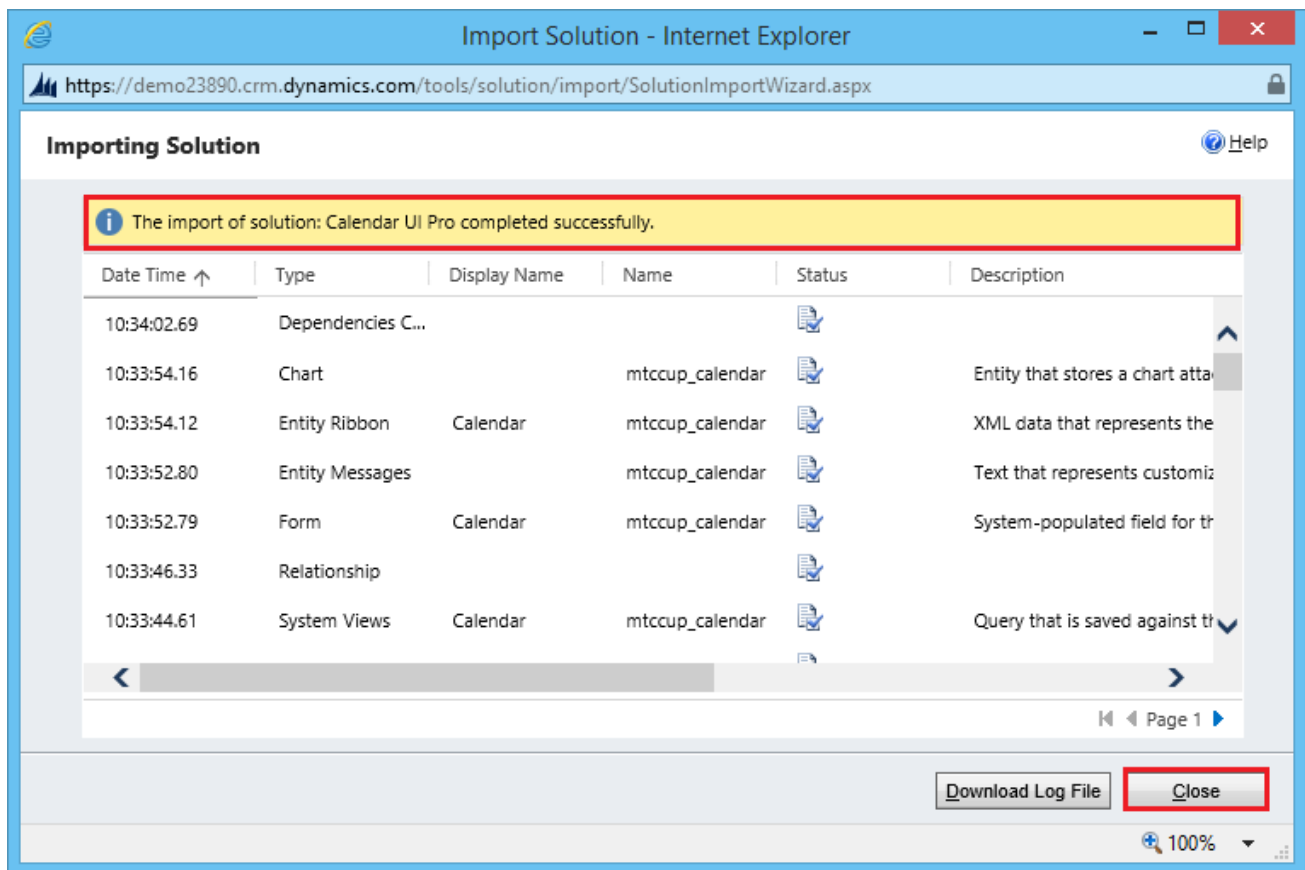


Figure 8: Importing Solution

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

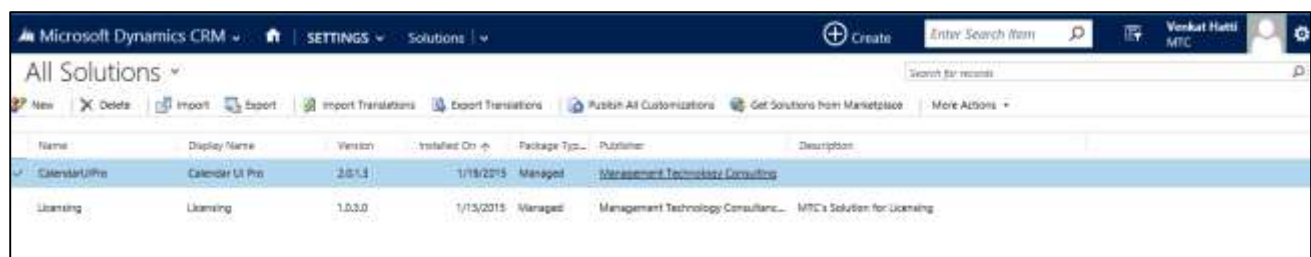


Figure 9: CRM Solutions - Calendar Pro

How to get License Key

- To install Calendar Pro 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

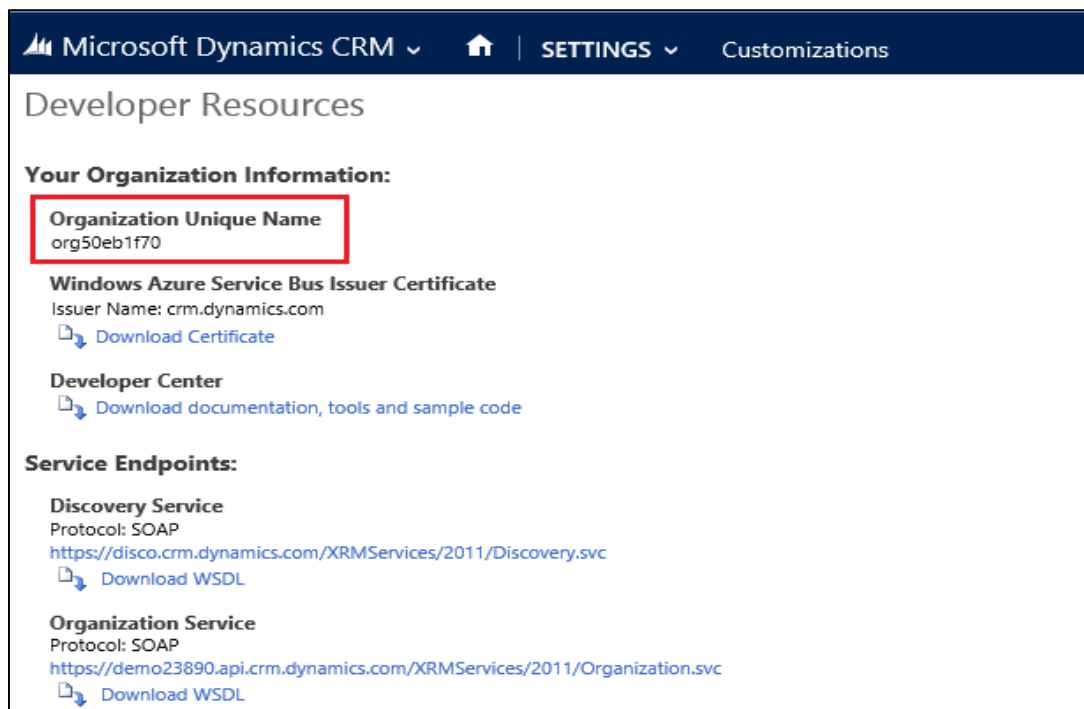


Figure 11: Organization Unique Name

- 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

Placing License Key

- To place license key go to **Settings→Solution→Double Click on Licensing** , as shown

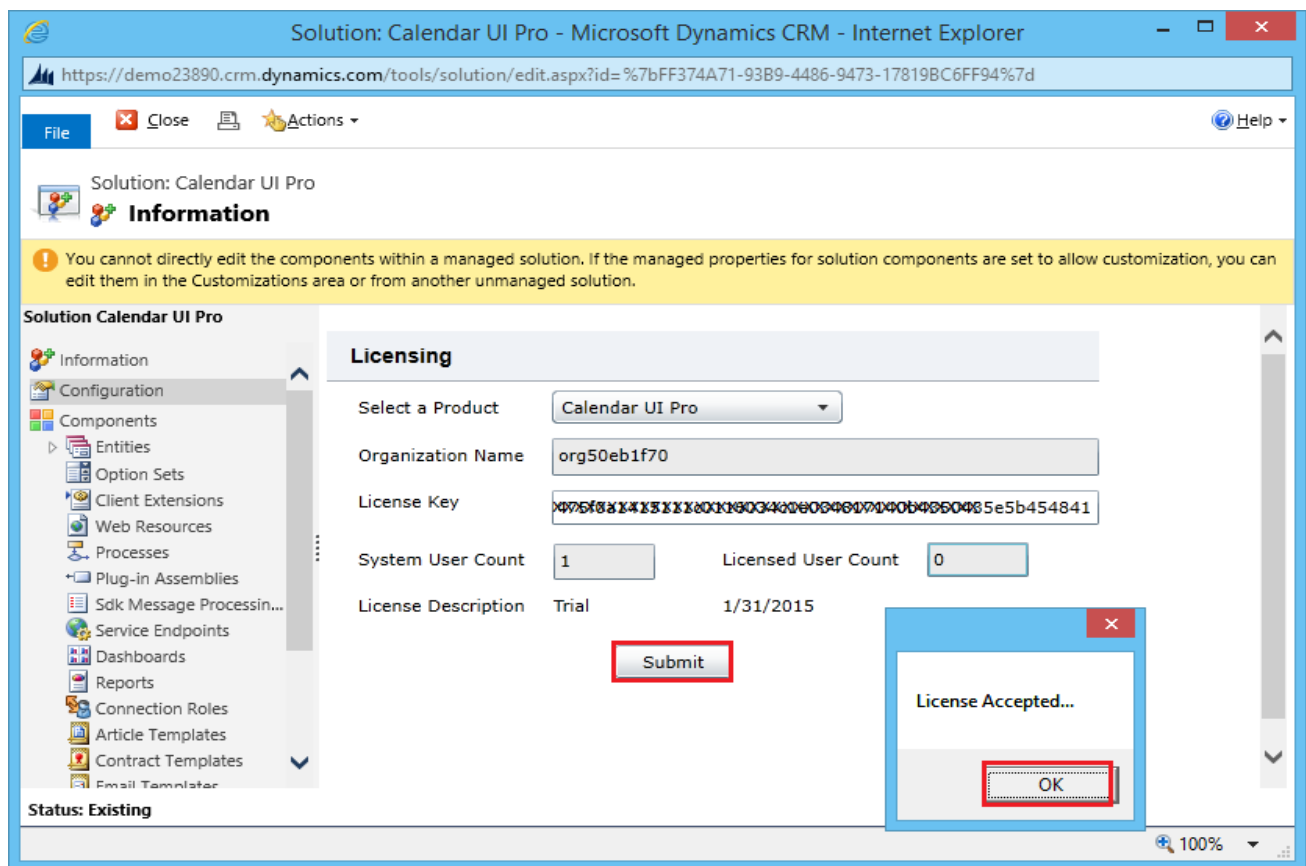


Figure 12: Placing the License Key

- Select Product as Calendar PRO
- 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.

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



- This image indicates the refresh icon. Using this we can refresh the Calendar PRO.



- This image indicates the Full screen functionality. By clicking on this button Calendar PRO 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.

Create a New Calendar

- User can define their choice to have calendar going thru the Setting and Customizations of the CRM.



- Select Entities and under this select Calendar
- Select the Area that you would like to have the Display of the entity.

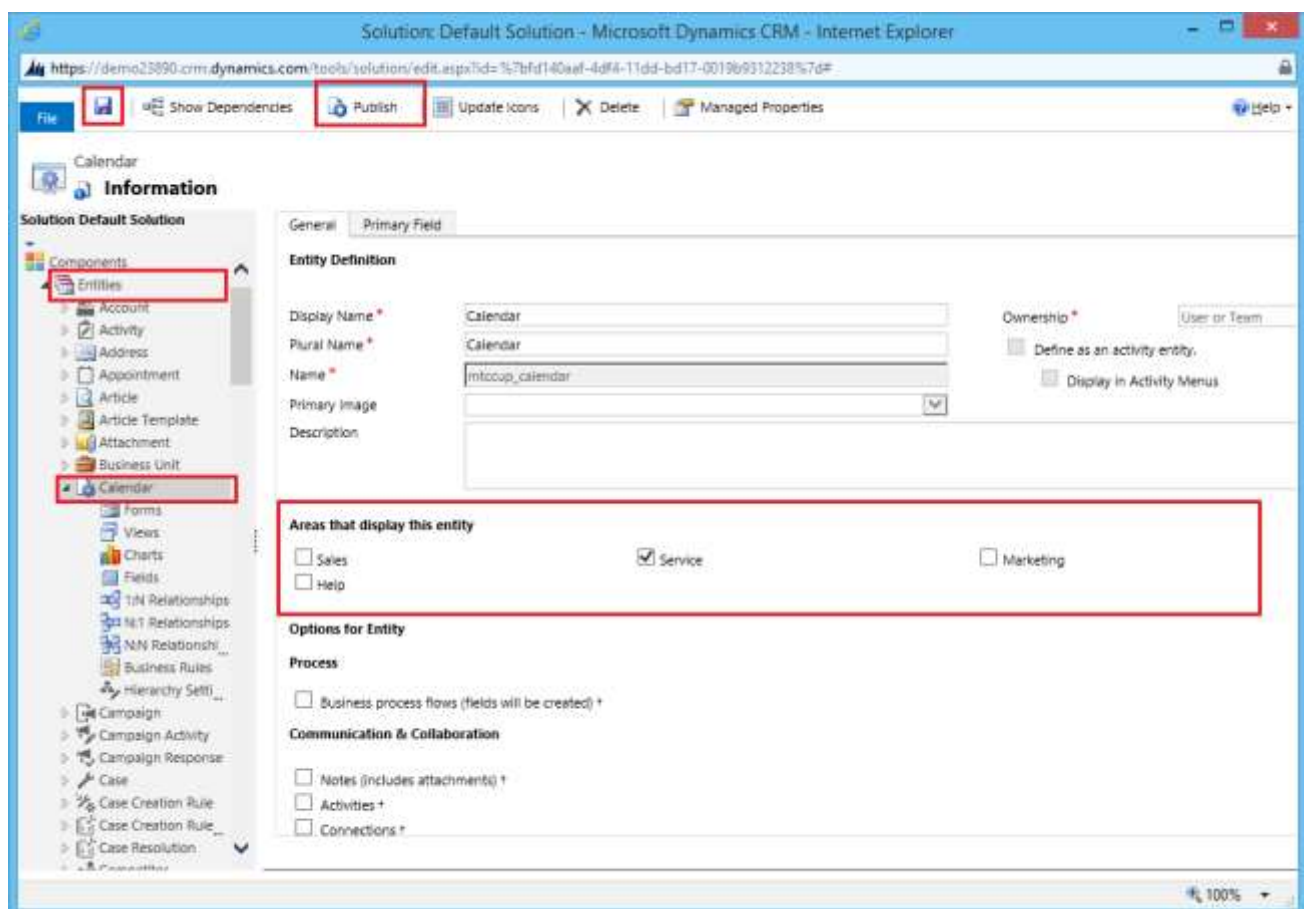


Figure 13: Customization screen

- For Example the user wishes to create a New Calendar for Service, Then select Service, Click on Save and click on Publish button as shown above
- Go to CRM->Service->Calendar**

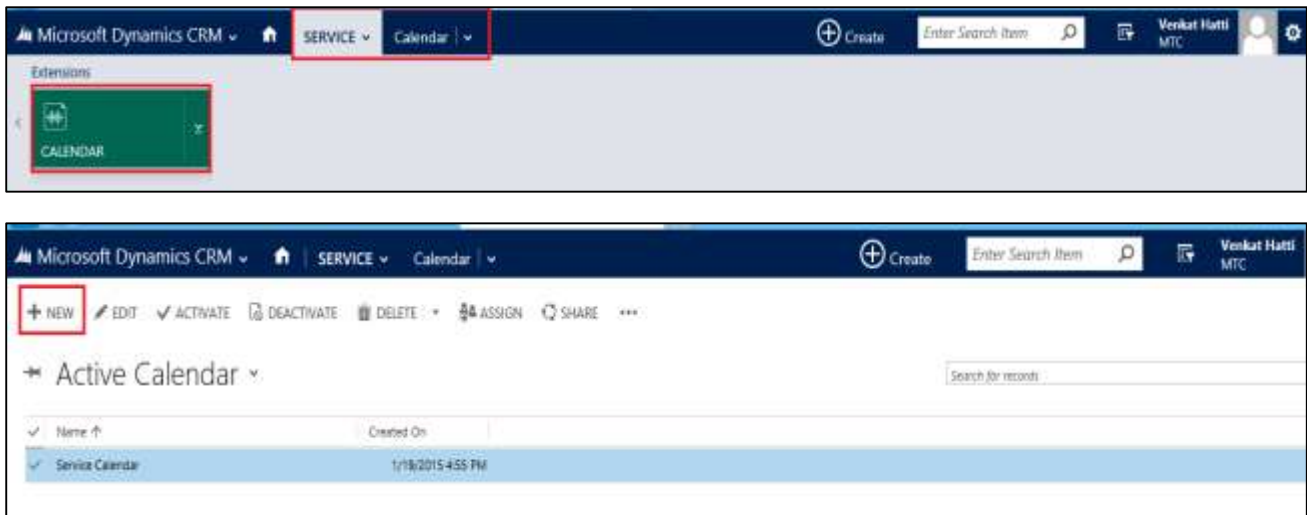


Figure 14: CRM showing the Active Calendar details

- Either click on New to create a new or Edit the existing calendar

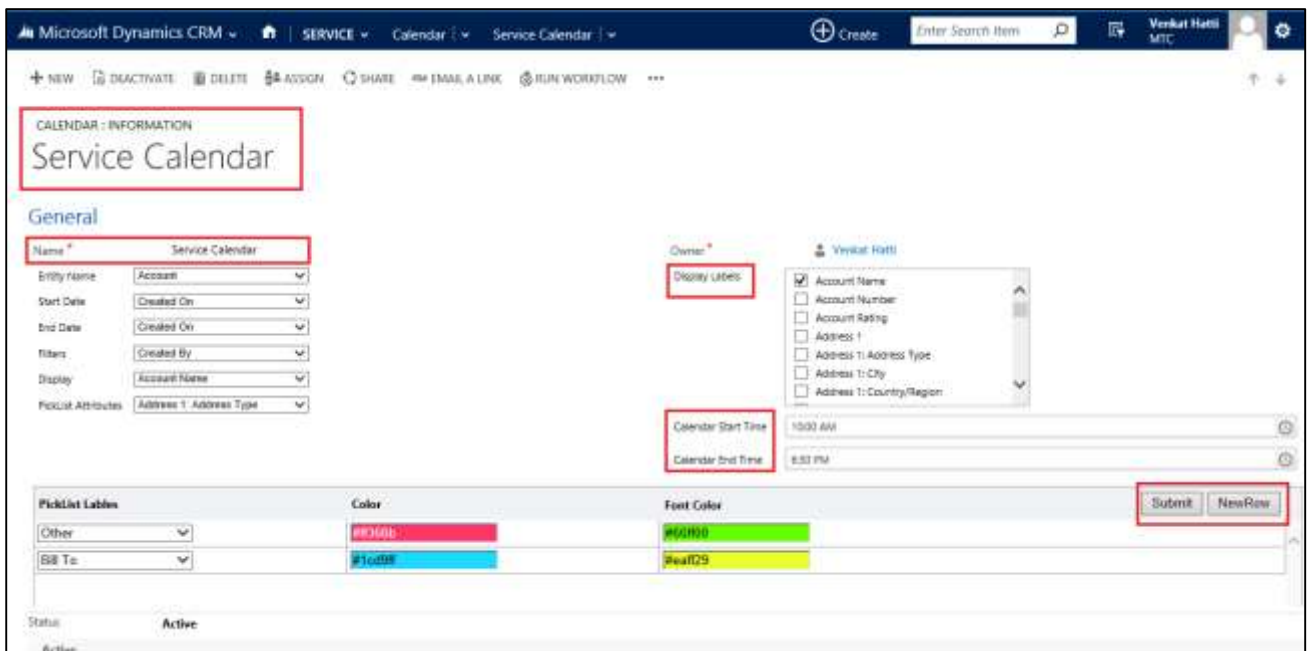
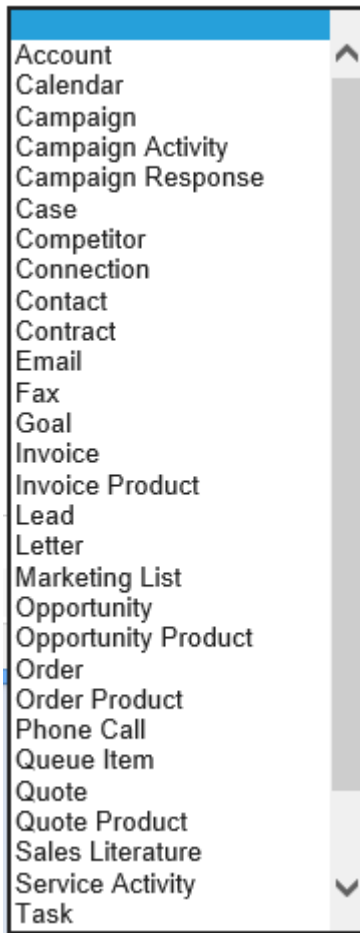


Figure 15: Calendar Information input fields

- Initially give the Calendar Name and Save
- Now select the Entity Name from the Drop down list



- For example if we select Account from the list as Entity Name
- It automatically displays all available fields for Display Label.
- These Display labels are helpful to show as Tool Tip in the main calendar UI
- User can select one or more display labels to show.
- Now Select Start Date from the Drop down list as shown below
- For example we select Created on as start date

Figure 16: Calendar Information input fields

- For example we select Record Created on as End date

The screenshot shows the 'Service Calendar' form in Microsoft Dynamics CRM. The 'End Date' dropdown menu is open, showing options: 'Created On', 'Last Date Included in Campaign', 'Modified On', and 'Record Created On'. The 'Record Created On' option is highlighted.

Figure 17: Calendar Information end date fields

- Now Select Filters (on which field would you like to filter the data) for example we select Contract

The screenshot shows the 'Service Calendar' form in Microsoft Dynamics CRM. The 'Filters' dropdown menu is open, showing a list of fields including 'Created By', 'Created By (Delegate)', 'Currency', 'Modified By', 'Modified By (Delegate)', 'Originating Lead', 'Parent Account', 'Preferred Facility/Equipment', 'Preferred Service', 'Preferred User', 'Price List', 'Primary Contact', and 'Territory'. The 'Contract' field is highlighted.

Figure 18: Calendar Information Filter fields

- Similarly select the Display also from the drop down list as shown below

Microsoft Dynamics CRM | SERV

+ NEW | DEACTIVATE | DELETE | ASSIGN

CALENDAR : INFORMATION

Service Calendar

Start Date: Created On

End Date: Created On

Filters: Created By

Display: ▼

PickList Attributes

- Account Name
- Account Number
- Account Rating
- Address 1
- Address 1: Address Type
- Address 1: City
- Address 1: Country/Region
- Address 1: County
- Address 1: Fax
- Address 1: Freight Terms
- Address 1: Latitude
- Address 1: Longitude
- Address 1: Name
- Address 1: Post Office Box
- Address 1: Primary Contact Name
- Address 1: Shipping Method
- Address 1: State/Province
- Address 1: Street 1
- Address 1: Street 2

PickList Labels

Figure 19: Calendar Information Display fields

- Now select the Pick listy Attributes from the pick up list relavent to the Entity Name

Microsoft Dynamics CRM | SERVICE

+ NEW | DEACTIVATE | DELETE | ASSIGN | REFRESH

CALENDAR : INFORMATION

Service Calendar

General

Name *

Entity Name

Start Date

End Date

Filters

Display

PickList Attributes: ▼

- Account Rating
- Address 1: Address Type
- Address 1: Freight Terms
- Address 1: Shipping Method
- Address 2: Address Type
- Address 2: Freight Terms
- Address 2: Shipping Method
- Business Type
- Category
- Classification
- Customer Size
- Industry
- Ownership
- Payment Terms
- Preferred Day
- Preferred Method of Contact
- Preferred Time
- Relationship Type
- Shipping Method

Figure 20: Calendar Information Pick List Attributes fields

- Now Enter the Calendar Start time and Calendar End time as shown below with the help of Icon

Figure 21: Information showing Calendar Start & End time

- Now Select the Pick list labels and also select the Color (Display cell color) and Font Color
- After finishing the first row click on Next Row button as shown below
- On completion of all the picklist labels as desired, click on Submit to Save the changes
- For Picklist labels user can define Color and Font color as per their choice. Same is shown below

Figure 22; Information showing the Pick list Color coding facility

Querying Option

- In this Calendar Pro, the user has an option to add his own query and filter data accordingly. This helps the user to have a calendar view of his choice
- As shown below user will see a field Query.
- User can use the existing query if any or can also create a query of his choice.
- For Example in the above Service Calendar, user have has created a query titled Active. This active will only display the Active Accounts from the CRM leaving behind other accounts.
- The creation of query or setting fillers is as similar to Advance find option in CRM.

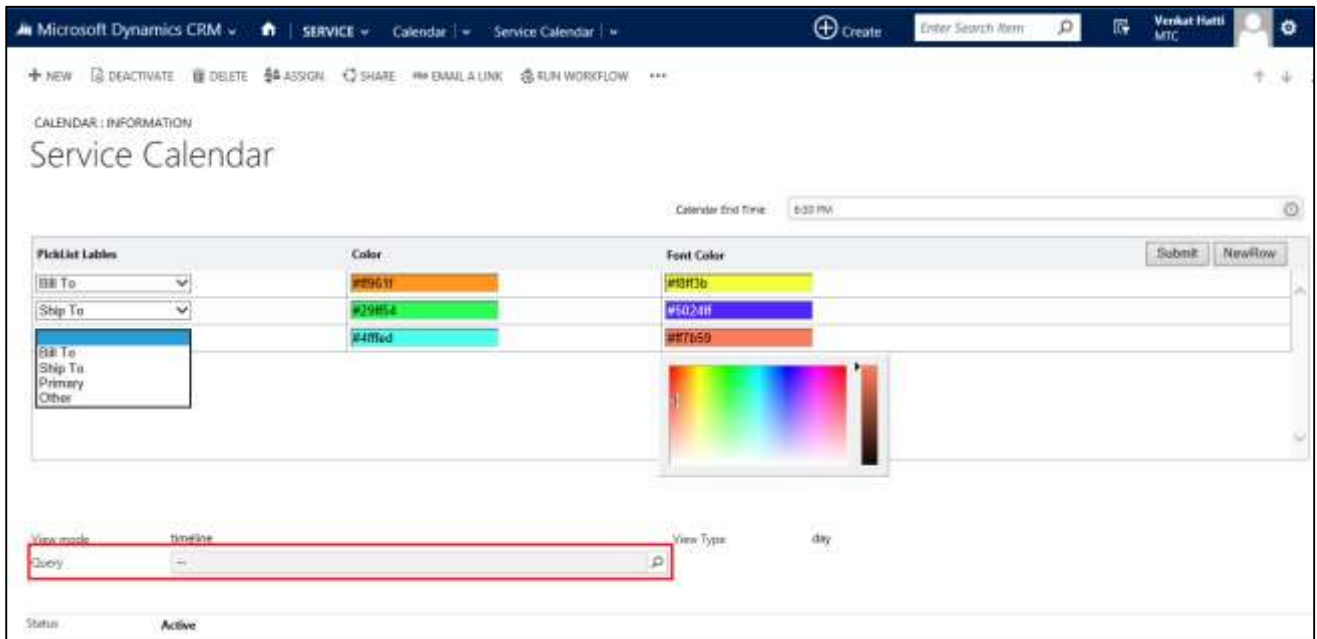


Figure 23: Calendar showing Query option

- Now save the form
- To View Calendar click on more (...) and select Calendar icon as shown below

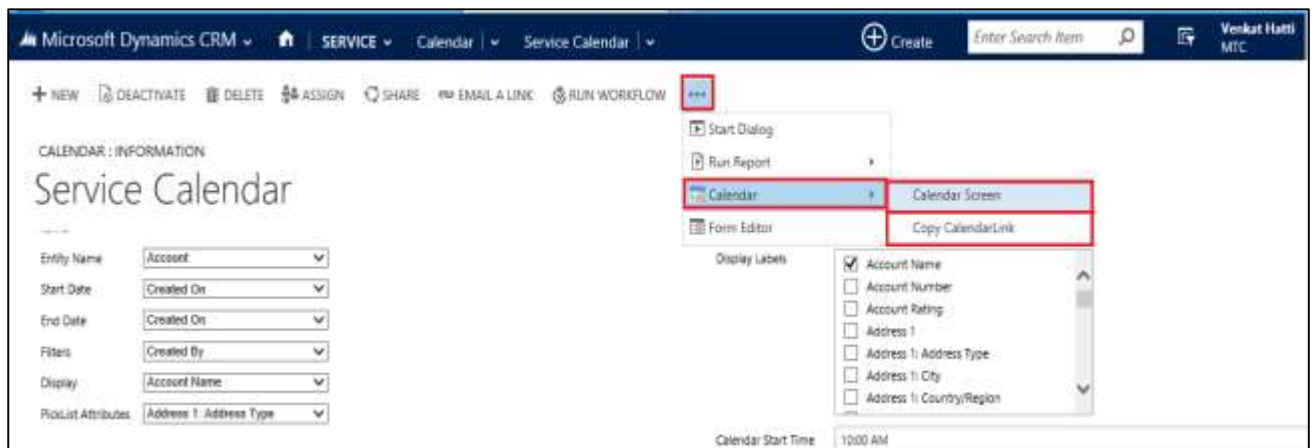


Figure 24: Calendar Screen option

- If you select Copy Calendar Link, it displays the URL link in a pop up window. Where the calendar can be directly accessed.

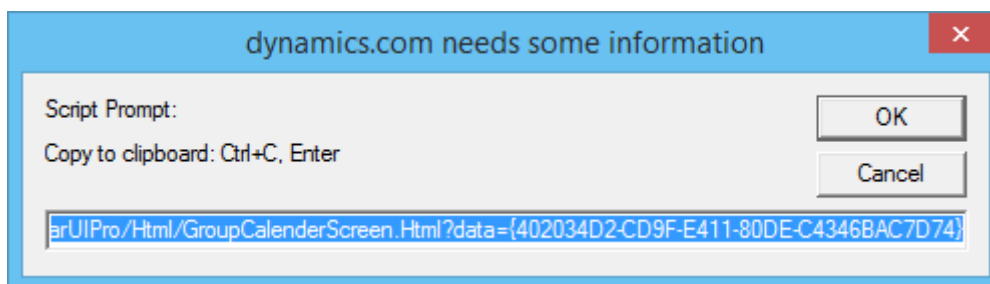


Figure 25: Copy Calendar Link screen

- Alternatively if you select Calendar Screen, then it displays the calendar as shown below
- The below view of the Calendar is Monthly view showing all the events for the month

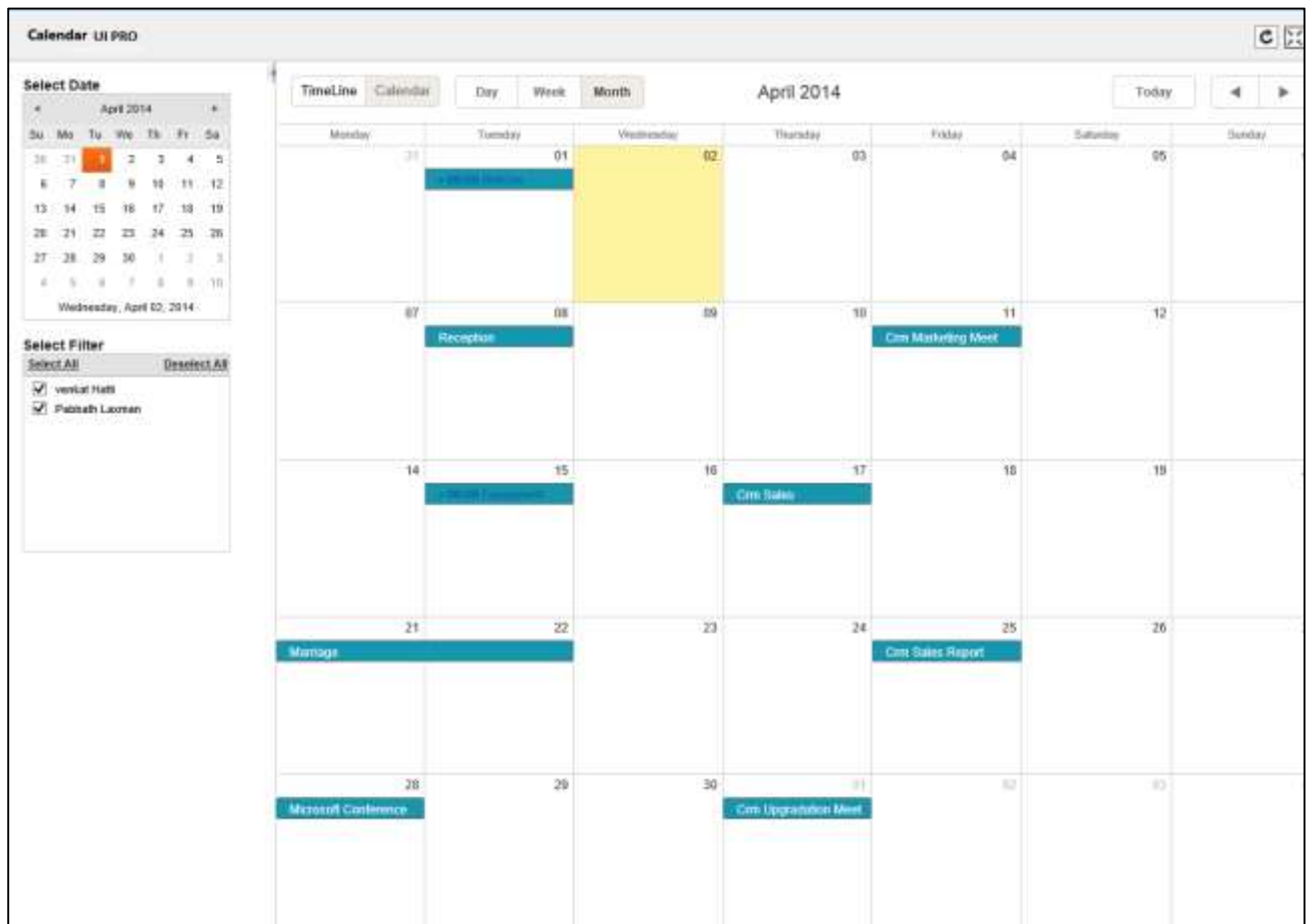


Figure 26: Monthly Calendar UI Pro View

- When you place the cursor on the date for example on 17th of March 2014, than user can view the details as registered for the tool tip displays.

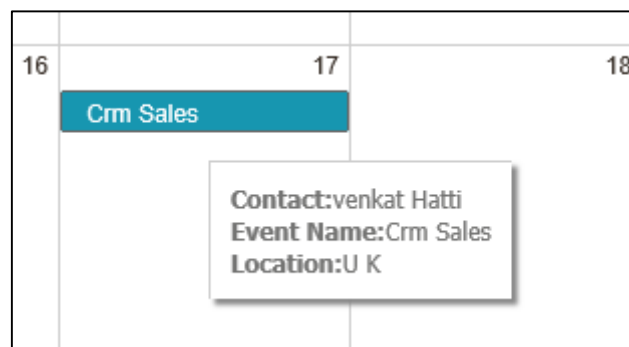


Figure 27: Tool Tip display

- User can view Contact, Event Name and Location. (These details were mentioned earlier).
- On double click of the same record will open the CRM record also.
- User also has the option to Drag & Drop the records with in the calendar.

- Resizing of the calendar is also possible.

Calendar Views & Options

This calendar Pro has the following views of calendar

- **Calendar view – Day**
- **Calendar View – Week**
- **Calendar View – Month**
- **Time Line View – Day**
- **Time Line View Week**
- **Time Line View – Month**
- **Full Page view**
- On the left side of the calendar page there is a Calendar where you can select the date or
- There is Select Filter Options where in you can select all users or deselect all users or select any one or more users for whom you would like to have the calendar view.

Uninstallation Process

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

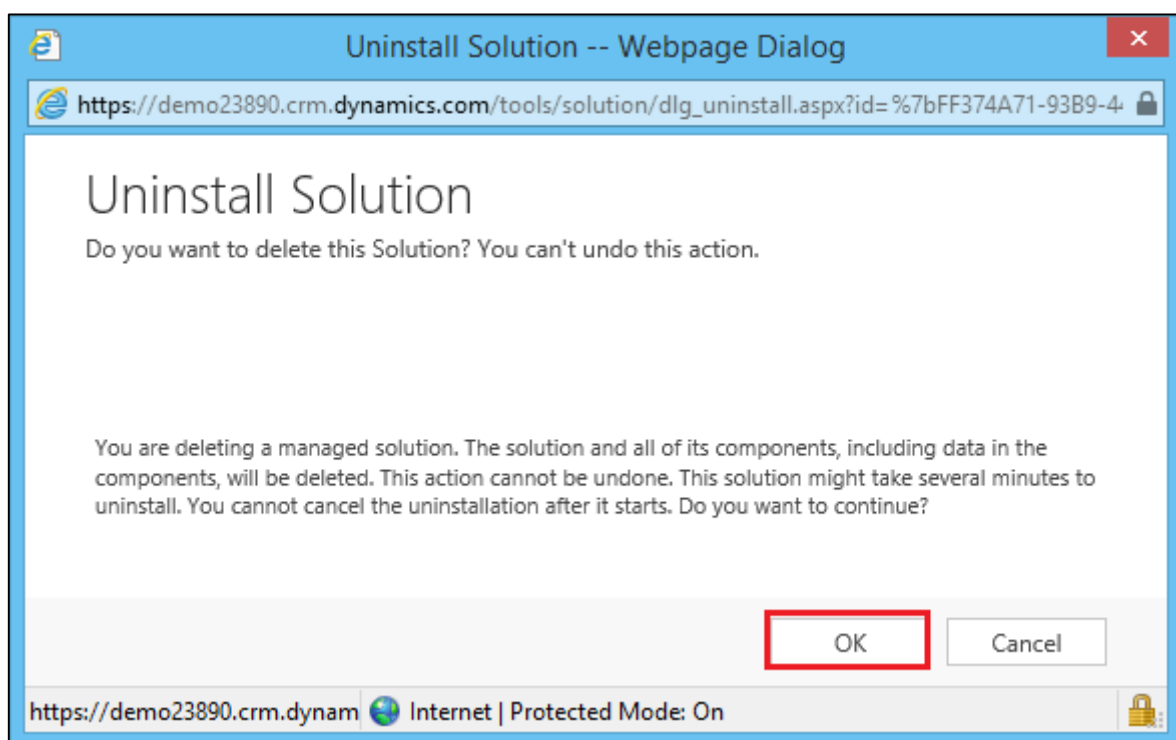
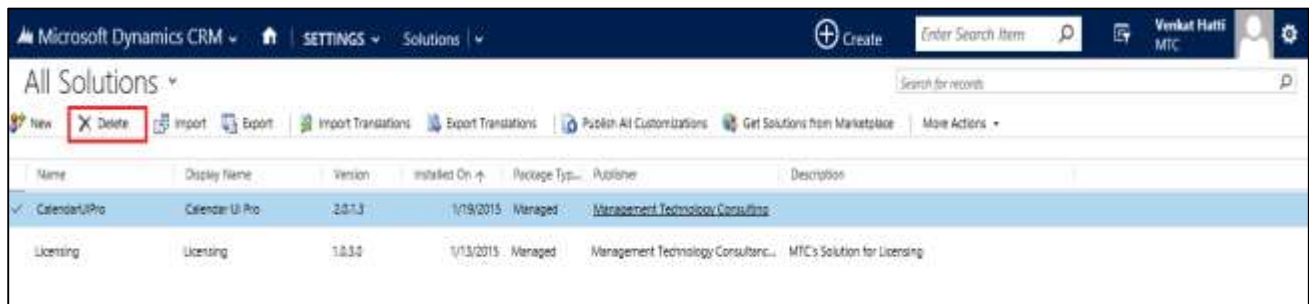


Figure 28 : Deleting Calendar PRO Solution

- Click on OK to delete the solution from CRM. The solution will be deleted
- Follow the above process to delete the Licensing solution also.

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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



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portal

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Software products offered by Management Technology Consulting LLC, (MTC) include 1 year of Annual Maintenance and support. Annual maintenance includes your right to the latest versions and any updates to this product at no charge during the 1st year of ownership. Future years of Annual Maintenance must be purchased at a fee equal to 25% of the original purchase price of the product. MTC will notify owners of record by email of the Annual Maintenance renewal time and facilitate collection of fees and simultaneously assure the latest versions and updates are in use.

F. Customer Care details

MTC is always open to global community of Microsoft Dynamics CRM platform Software Users



Availability and hours of operation: Monday to Friday

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

India IST 323-863-0077 - 8:30 PM to 8:30 AM in PST

USA Headquarters:

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7738 Sky hill Drive, Los Angeles, CA 90068

Request and receive support online at www.MTCCRM.com Review, order, fund, track, and manage your solution needs online securely, conveniently, affordably 24/7 with MTC online. MTC is a leader in CRM customer web Portal offerings in connected Microsoft CRM enterprise solutions for social and business transactions– see solutions in action as you get what you need from MTC online on your time.