GroupCalendar for MS CRM 3

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1   Welcome

Welcome to the help for **GroupCalendar for MS CRM 3**. This document will show you the functionality and features of the GroupCalendar.

If you need to reach us, see the Contact page

2   User's Guide

2.1   Introduction

GroupCalendar is an enhancement for Microsoft CRM 3 that is designed to provide a comprehensive view of all activities associated with an user or an group of users.

With the GroupCalendar users now can view the calendars of one or many users at the same time. So they can check for scheduling conflicts and also can check the activities for a team scheduling.

GroupCalendar for MS CRM gives you the ability to view this activities in a day-, week- or month-view.

2.1.1 Why you should use GroupCalendar

GroupCalendar testimonial from one of our customers

We had a need with our Microsoft CRM implementation to allow efficient scheduling of appointments for our salespeople by our telesales department. Native CRM calendaring did not give the functionality for one manager to see a quick, complete view of a subordinate's activities, so we searched for a solution - and found the excellent GroupCalendar. It allows our telesales department to quickly view scheduled activities of all salespeople so they spend more time creating appointments with revenue generating leads and less time trying to discover when a salesperson is available.

2.2   How to Use

To access the **GroupCalendar** select the
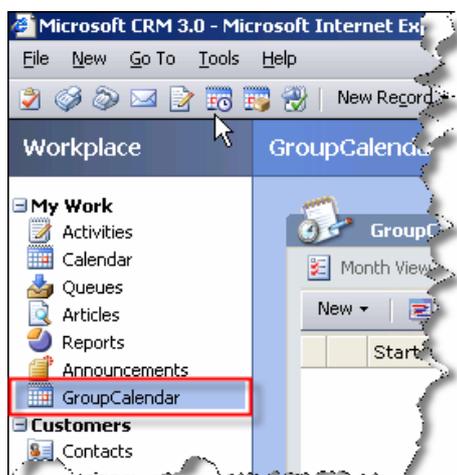
side tab button from the HOME of Microsoft CRM 3. When you open the GroupCalendar the first time you will see the activities from today.

2.3   Side Bar

The Side-Bar is in every view(day,week,month) the same.

Shows the selected dav

Select month and year with a click.

Click this button to select more then one user. This is helpful to see the activities of user1, user2,.. at the same time.

With a click on the day you can witch to another day.

With the "Settings" button each user can define his own personal settings of the **GroupCalendar**. (visibility of columns,width of columns,..)

With a click on the week you change autom. into the week view of this week.

Click on this button to switch to the day-view of today.

The checkboxes allows the user to select activity-type should be visible in the GroupCalendar.

This dropdown list box gives you the ability to select between different users and groups.

Shows you the actual selected user(s) or group.

Filter to show only the open actibities or activities where the choosen users are only attendees.

Opens a Print Preview Window. Printing is not available in month view.

2.4   Personal settings

With clicking the "Settings"-Button on the Side-Bar each user can configure the look and feel of the GroupCalendar as he wants.
What can be defined in the settings:

- Default view when opening the GroupCalendar.
- Column-width
- Columns visible
- Default user/group selection when opening the GroupCalendar
- Default filter criterias of the side-bar
- ..

2.4.1 Define Groups

1. Open Advanced Find in MS CRM :
2. Change in the "Look For" Drop-Down-Listbox the type to "Users" and select the criteria's for the group of users you want to define.
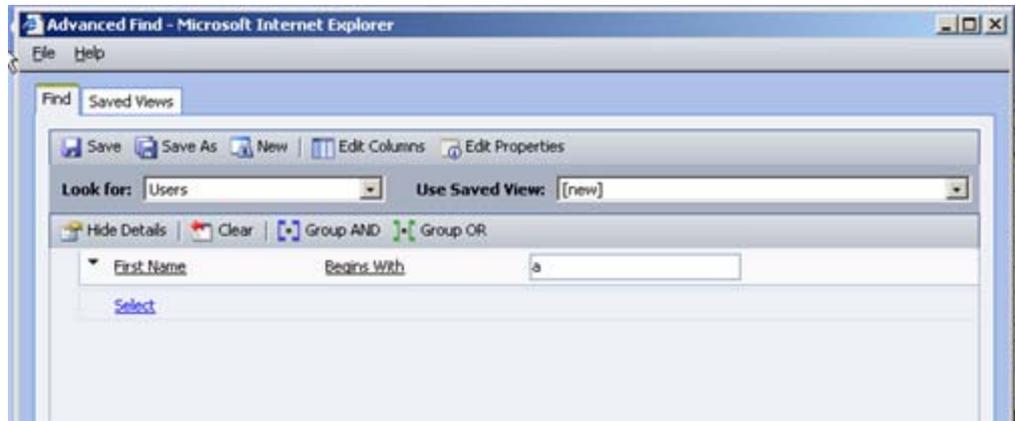
3. Click on "Save as" and give the group a name.
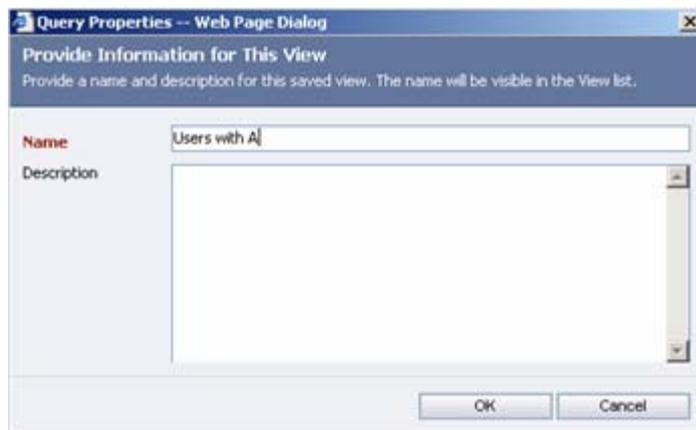
4. Go back to the GroupCalendar and open the drop-down list box "Select Users". You will see now the new created group "Users with A"

2.5   Default Settings

In this window it is possible to define the default view when opening the GroupCalendar. Also it is possible to define the default Group/User and filter criterias.

To change the position of the columns you have to modify the Sort-Column. This is done via drag and drop. Grab a column and drop it at the desired position. The slot where a column can be dropped will be highlighted on drag over.

Column width can be changed by dragging the edges of the column headers to either side to enlarge or shrink column

2.6 Day-View

This page should give you a overview of the day-view. After opening the lines are sorted by the start time. The rows may be resorted by clicking on any column header. Clicking on a column header once will sort records in ascending order. Clicking the same column header a second time will sort indescending order.

Double clicking on a row will open the activity in a new form. With the checkboxes in the right you can define which activities you want to see.

2.7 TopDown-View
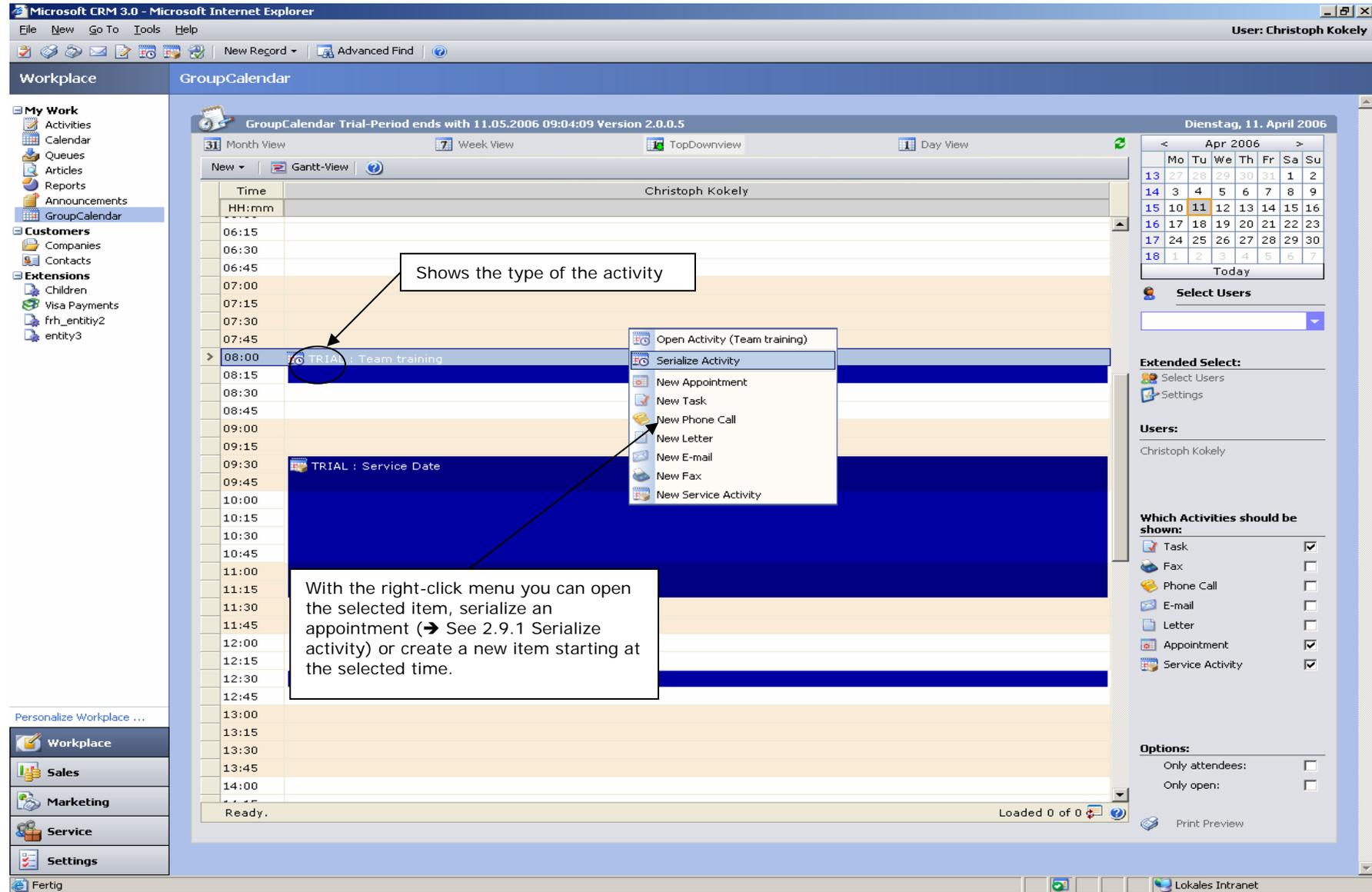
2.7.1 Serialize Activity
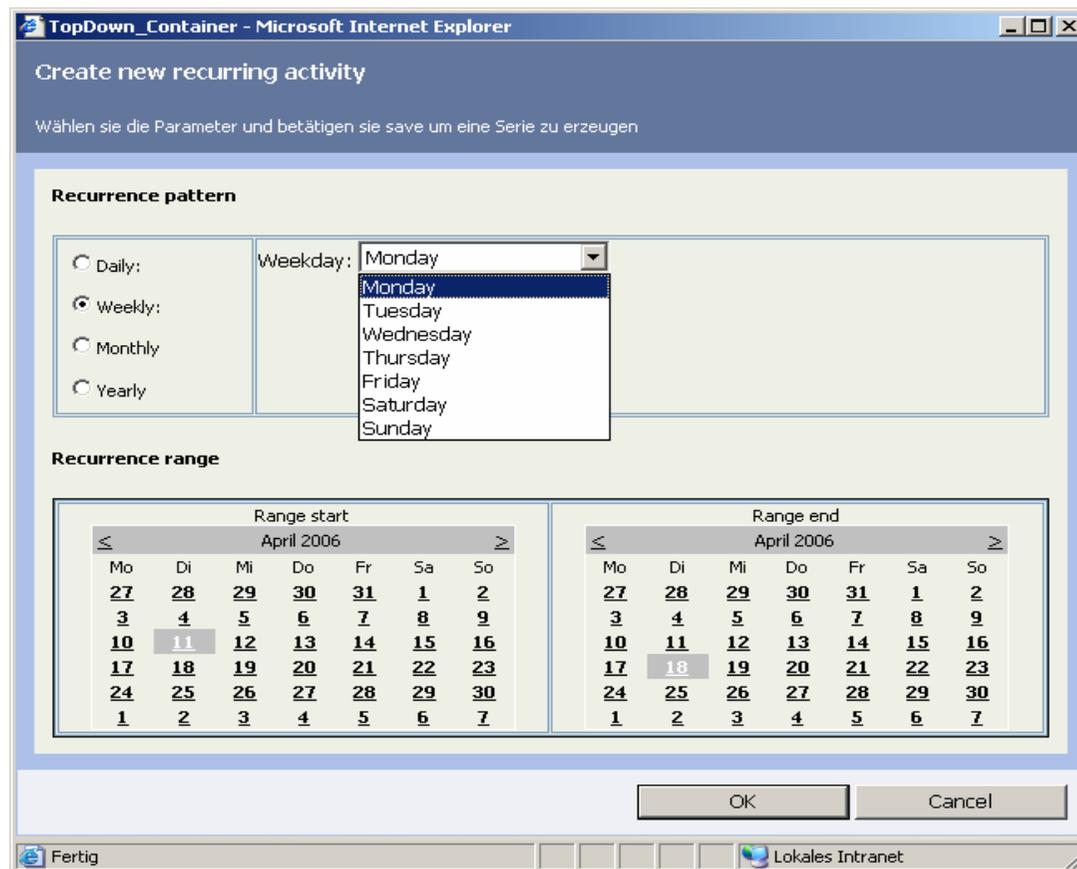
On serialize activity (only available for Appointments) the dialog shown above pops up and offers several options for serialization.
The "Recurrence pattern" area defines how often the appointment is repeated during the time range defined in "Recurrence range".
Range options include the selected days. The "Recurrence pattern" changes on each selected option, giving no further choice for daily, weekday selection for weekly, specific day selection on monthly and a calendar to select a day on yearly schedules.

2.8 Week-View

Change to the Gantt-View.

Day of the week.

With the right-click menu you can add Notes or open the regarding object

2.9 Month-View

2.10 Gantt-View

3   Contact

If you have questions to the product send a Email to
support@mscrm-addons.com

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