

GroupCalendar for MS CRM 4

Users Guide

(How to use Group Calendar for MS CRM)

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Welcome

Welcome to the User's Guide for Group-Calendar in MS CRM. This File contains detailed descriptions about functions and abilities of Group-Calendar for MS CRM 4.0.

If questions are kept unanswered with this document, feel free to contact us (see chapter "Contact").

2.1 Introduction

Group-Calendar is an Add-on for Microsoft CRM 4 which was designed to give an overview of activities from other users or a group of users.

With Group-calendar users are able to see calendars of one or more users at the same time. They are able to oversee happenings and activities of each user.

Group-Calendar gives you the ability to see these events in day-, week-, monthor top-down view. Each period itself can be displayed in List or Gantt-view.

Why should you use the Group-Calendar for CRM?

Review from one of our customers:

"We needed for our telemarketing department in our Microsoft CRM application an effective way to meet sales people. The original CRM calendar system was not able to give a manager a quick, comprehensive overview of all child activities, so we searched for a solution and have found the excellent group calendar. This allows our telesales department a quick overview of all sales people so they have more time for agreements with strong leaders and waste less time searching for energetic sales people."

2.2 Application

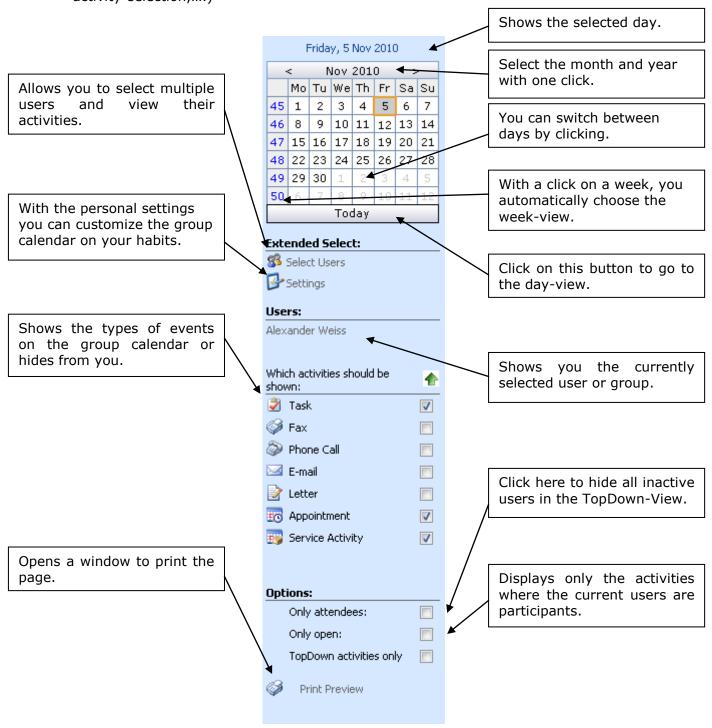
To get to Group Calendar,



Pick Group-Calendar in the workplace of the homepage of Microsoft CRM. The default view can be configured for each user.

2.3 Sidebar

The sidebar contains several display settings (e.g. date-picker, user-selection, activity-selection,....)



2.4 Personal Settings

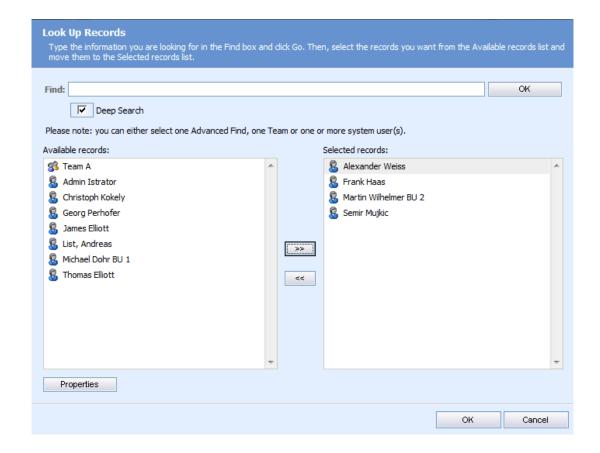
With the Settings button each user can customize the view to fit his desires and needs.

Configuration options:

- Default view of the group calendar.
- Column sizes
- Column view
- Default user or group selection
- Predetermined filter characteristics for the view of group calendar
- ...

Switch and add Users

Click on "Select User" and you will get to this dialog box (see below). In this window, you can search, add or remove users or even whole groups.

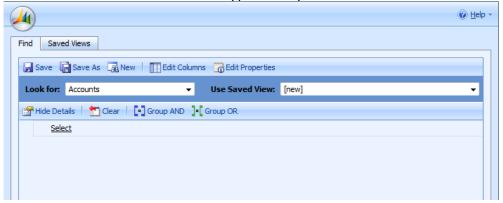


Define groups

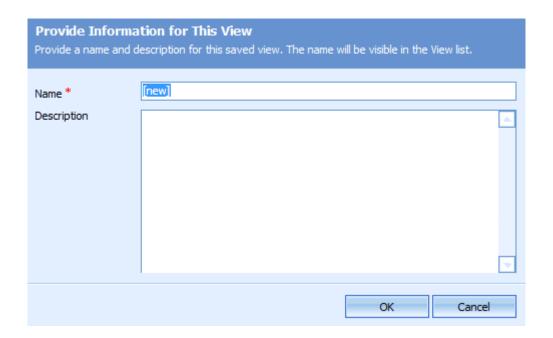
Usergroups can be defined via Saved-views:

1. Open advanced find in CRM:





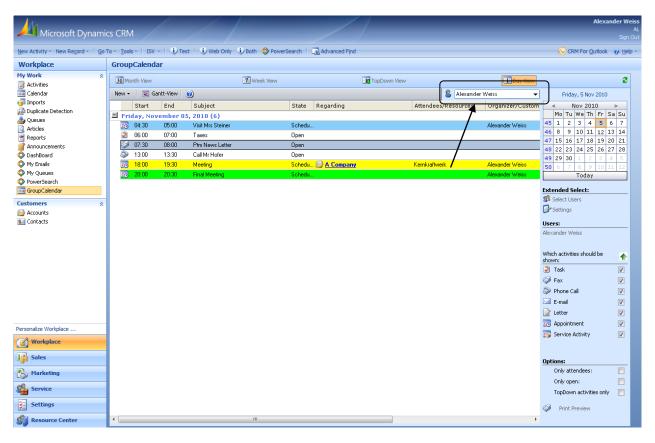
3. Click on "Save as..." and select a suitable name for the group:



This way you can e.g. create a view that retrieves all users working in the Salesdepartment and therefore get an overview of all planned sales-activities.

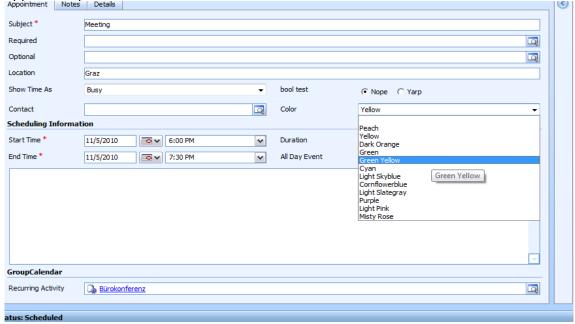
4. Back to the GC, you can select the newly created group via the Drop-down-box (see picture).

INFO: You may need to refresh the user list. To do this you click on the refresh command (F5 or the refresh-icon at the top right corner of GC).

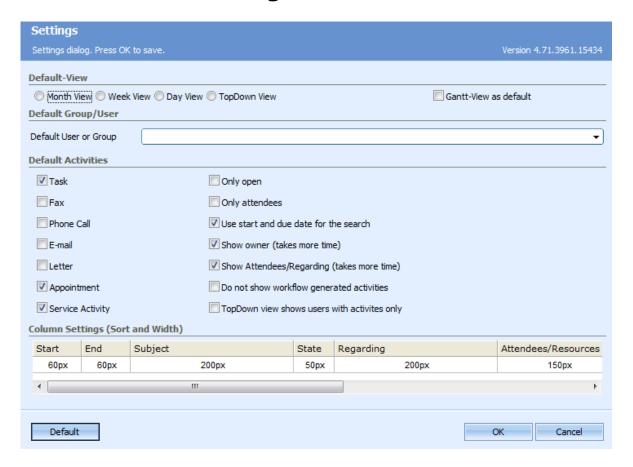


Color-coding of service activities

Since version 4.64 a specific color can be applied to service activities. Double click on the activity to open its properties. A new picklist-value (Color) appears is placed on the main-form.



2.5 Additional Settings



In this window you can change the default settings for the group calendar:

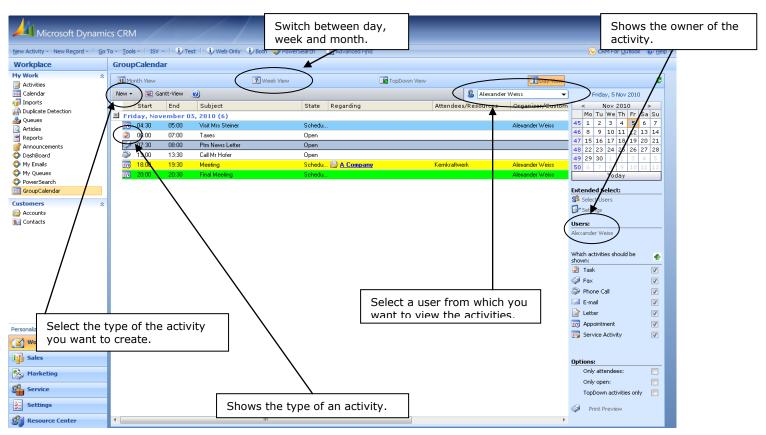
- Default view
- Default activities
- Default users

Next to this, it is possible to adopt the main display settings of the week-/day-view:

- -columns can be reordered via drag and drop. Click and hold down a row and drag the line to the desired location before releasing them again. You will see a highlight where the line can be dropped.
- -The line width can be altered by pulling apart the line at the corners or by pushing it together. (Additionally you can also double-click on a line and align the line width (pixels).)

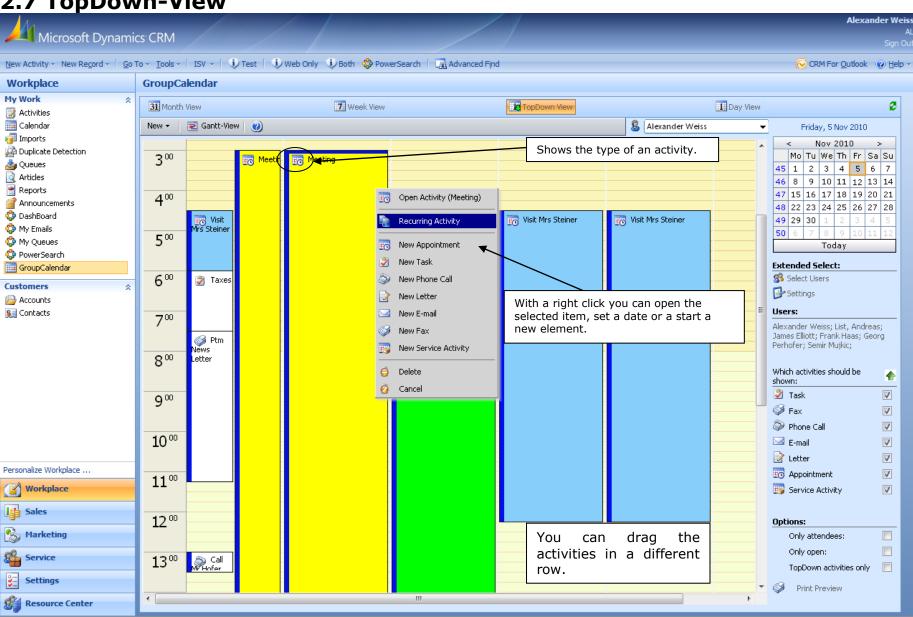
2.6 Day-View

This page is intended as a summary of the activities on a specific day. Once opened, the rows are arranged according to their start time. Rows can be sorted with a click on the header. When clicking a header, records are displayed in an ascending order. A further click on it will lead to a descending sort.



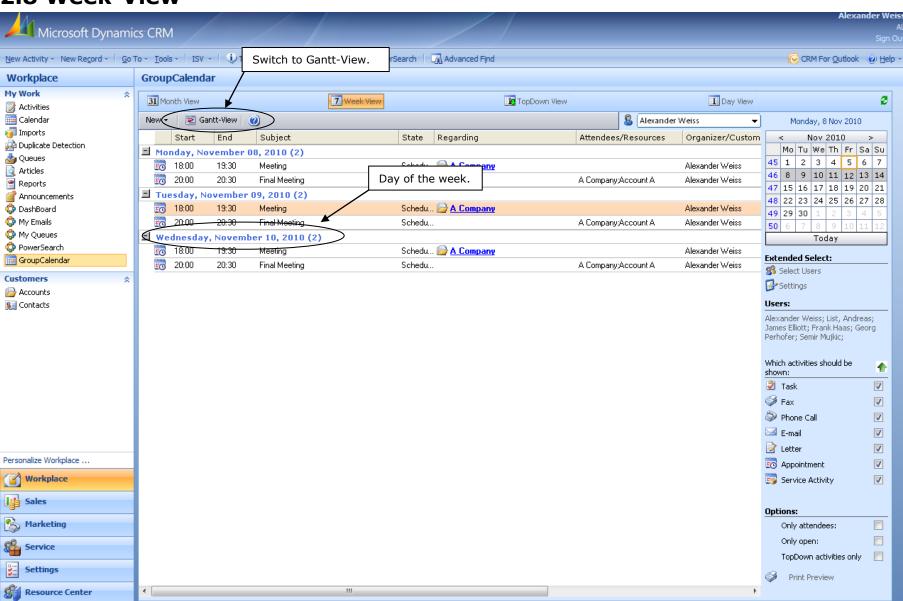
With a double click on an activity, the activity will be displayed in a new window. Use the checkboxes on the right to select which activity-types you want to see within the day-view.

2.7 TopDown-View

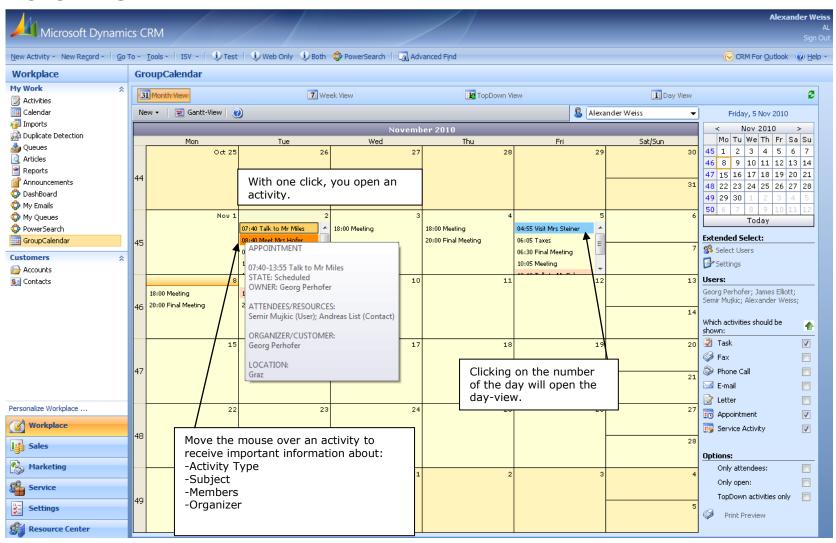


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2.8 Week-View



2.9 Month-View



2.10 Gantt-View

The GANTT-view often provides a better overview than the list view. Especially when many users are selected (many activities need to be displayed).

INFO: Another feature of the Gantt view is the ability to reschedule activities via drag and drop. E.g.: to apply the activity to another user/time, you can easily drag the activity and place it on a specific time/date/user.

Multi-line display of activities in the Gantt-view

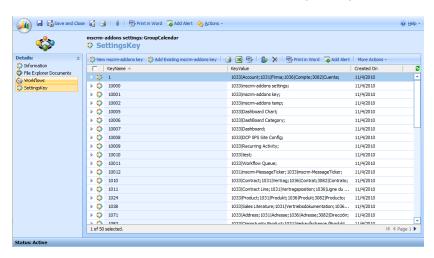
Activities can be configured to show up in multiple lines (e.g 3 lines per user). On the one hand, you can configure a display name and also the associated attribute which is displayed by the group calendar. These settings are made in the settings of the group calendar. (see Example below)

For the display name, this would be the following syntax: AddGanttAttrDesc[TYPENAME][LINENUMBER] And the following for the attribute syntax: AddGanttAttr[TYPENAME][LINENUMBER] [TYPENAME] is the entity schema name

[LINENUMBER] is the line number starting with 1. The very first line is still the subject.

For example, to the appointment of the entity attribute "location" with the caption "location" in the 1 Line. In the 2nd line of the attribute "requiredattendees" marked "Required" and in the 3rd line a custom attribute which is a "Look up" to the contact which is called "new_contactid" and the label "Contact".

Furthermore, also still in the Service Activity entity "location" in the first line.

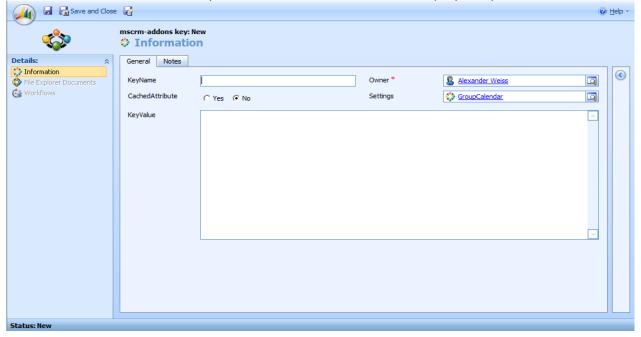


Group-Calendar/ Settings

The following settings would be needed for this example:

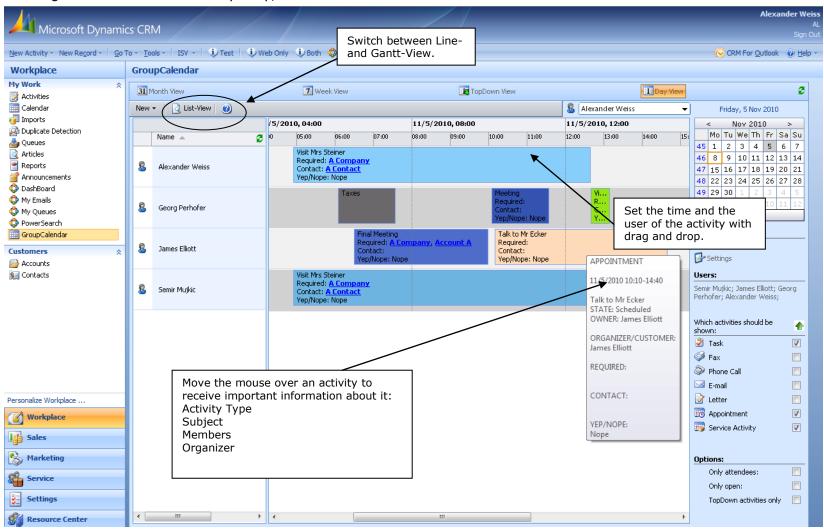
Key Name Key Value Description AddGanttAttrDescaccount1 Date 1.Line, Name "location" Ort AddGanttAttraccount1 location Date 1.Line, Attribute "location" AddGanttAttrDescaccount2 Required Date 2.Line, Name "Required" AddGanttAttraccount2 Date 2.Line, Attribute "requiredattendees" requiredattendees AddGanttAttrDescaccount3 Date 3 Line, Name "Contact" Contact Date 3.Line, Attribute "new_contactid" AddGanttAttraccount3 new contactid AddGanttAttrDescserviceappointment1 Service Activity 1.Line, Name "Ort" Ort AddGanttAttrserviceappointment1 location Service Activity 1.Line, Attribute "location"

We need to set in which view you want to see the multi-line display. In your case that would be just the day view.



Create a Settings key

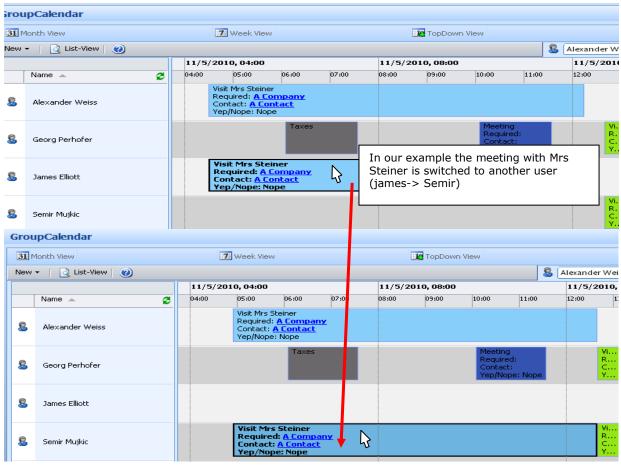
That would be an adjustment with the key name "GanttMultipleLineViews" and the key value "day". Possible values are "day", "week" and "month". These settings can also be combined. To see the multi-line display, for example, in the day- and week-view, the following value would be necessary "day, week".



Gantt-View

Drag and Drop

In the Gantt view, you can assign activities using drag and drop to a different time or another user. You can move the activity which you are holding with the mouse freely in the time line and the lines of different users. Release the mouse button to place the activity on the desired position.



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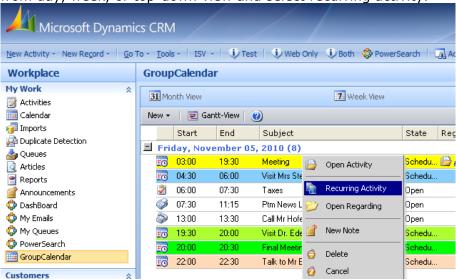
2.11 Recurring Activities

Another feature provided by the GroupCalendar is to create "recurring activities" (Repeating events) with appointments, tasks, calls and service activities. To create a new schedule the base activity must already exist.

Creating a recurring activity in Group-calendar (via context menu)

To create a recurring activity in Group-calendar, right-click the activity you want to make "recurring"

from day, week, or top-down view and select recurring activity.



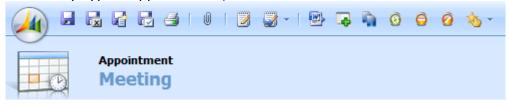
Week-/day-view



TopDown-View

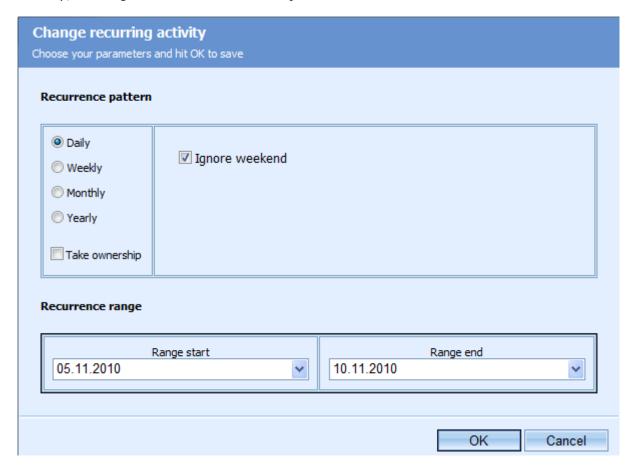
Creating a recurring activity from Microsoft CRM (via CRM toolbar)

It is also possible to create a new series from the Microsoft CRM toolbar directly. You need to open the activity and choose "recurring activity" in the toolbar. As described above, these buttons are available for activity-types: appointments, tasks and calls.



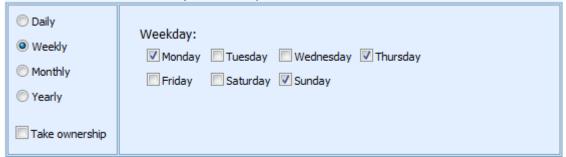
Recurring activity dialog

If you followed the steps described above, you will see the following dialog. With the same steps, you can also modify existing activities (change start-, end-date, change the repeating pattern,...). It is possible to create several recurrence patterns (see picture). When creating a new recurring activity, the original start date will be adjusted to the series.



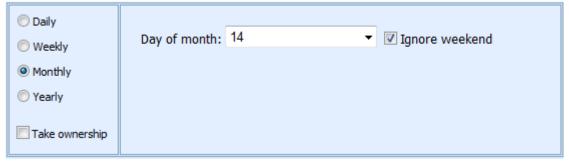
Recurring pattern:

- Daily
 The activity will be crated for each day. It is possible to ignore weekends.
- Weekly
 You can pick the days of the week where the activity should be created. The activity will be created until the end date you have specified.



Monthly

You can pick the day when the activity should be created for each month. (e.g. every 10th). The activity will be created until the end date you have specified. Again it is possible to ignore weekends.



Yearly

You can pick the date of the year in order to create a yearly activity (e.g. Christmas-celebration on 15th December). The activity will be created until the end date you have specified. You have the possibility to ignore weekends.

O Daily Weekly	18.11.2010
Monthly	☑ Ignore weekend
Yearly	
▽ Take ownership	

Take Ownership:

It is possible to take ownership rights on the created activities, although the base-activities owner is another user. When a user takes ownership rights, he keeps it until he resets the ownership. If you create a series, the activities are linked by a new "LookUp" property. This property shows up on the activities (appointments, tasks, calls).

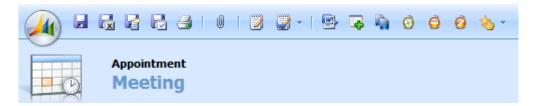
Recurring tasks and calls

The group calendar will create tasks and calls the same way as Outlook does. The next call / task of the series is generated only if the previous task/call is completed, stopped, or deleted. If you want to create a recurring activity without a predetermined period, the group calendar will automatically create a time frame for the activity. The start time is the last quarter of an hour in the past from the foundation and the end 15 minutes after that time. The duration is set to 15 minutes.

Example: When a recurring task is created named "Weekly Status Report" to view and set out every 7 days was leaking (Sunday) and the repetition is set to 10 instances, only one task is generated. The second Task will automatically be created when the first task is completed, canceled, or deleted. This habit is similar to Outlooks behaviors.

Changing a series

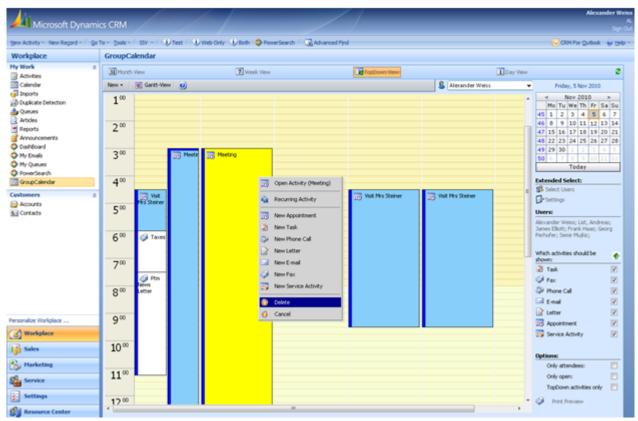
If you want to change a series which is already created and adopt the changes to the whole series, simply open the activity, perform the change, save the activity and press the "perform changes" button in the toolbar of the appointment of the task or the call.



Important: Canceled and Completed activities are not affected when you cancel a series due to time constraints.

Deleting a Series

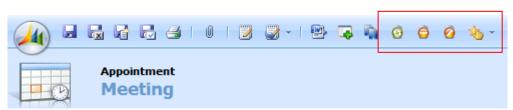
You can delete a series from the activity itself or directly from the Group Calendar in the right-click-menu of the day-/week-/TopDown-view.



Top Down-View



Week-/day-view



Activities Toolbar

If you select delete you will see the following dialog:

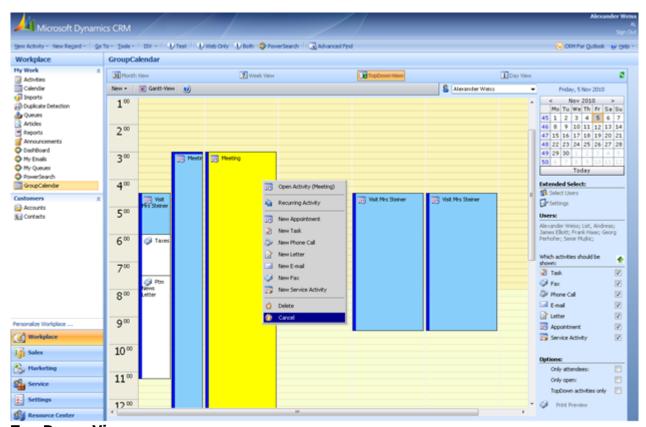


You can delete either the activity or the entire series.

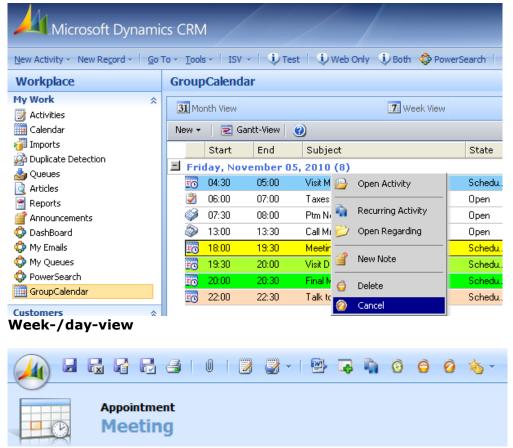
Important: Canceled and completed activities are not affected when you cancel a series due to time constraints.

Cancel Series

You can cancel a series from the activity itself or directly from the Group Calendar in the right-click-menu of the day-/week-/TopDown-view.



Top Down-View



Activities Toolbar

If you select cancel you will see the following dialog:



You can either cancel the activity or the entire series.

Important: Canceled and Completed activities are not affected when you cancel a series due to time constraints.

Notification when a series runs out

The owner of a Series will be notified by email when a series ends. This way owners get informed in case e.g. that the activity needs to proceed in future.

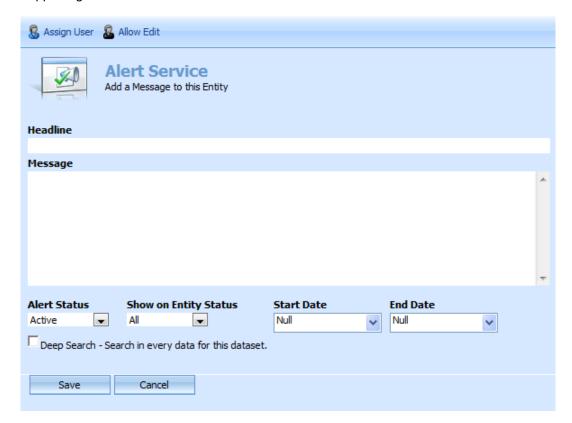
2.12 Add Alerts

To receive a notification in the form of an alert, open an activity and click on the "Add Alert"-button.



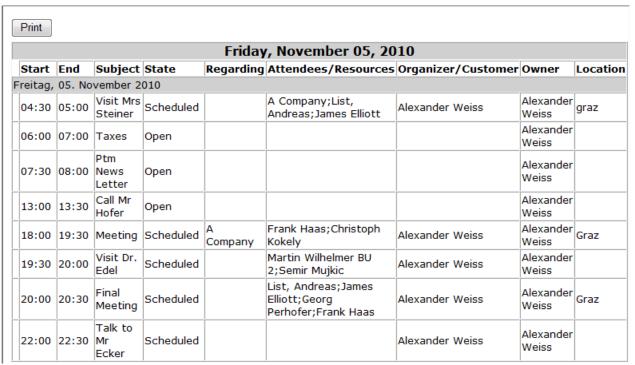
Add Alert

Now you will see this window (see below). You can change the title, message, start and end date of the alarm and save the alarm. You will be notified when an activity starts or is opened. You can also set the alarm to be viewed and modified by other Users. This action is best suited to remember other users that an important activity is happening.



2.13 Print

To go to print preview, click "Print Preview" in the sidebar. Click Print. You can select the number of copies to print and the printer you want to use.



Print preview

Contact

If you have any questions regarding our products please send an e-mail:

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