



GroupCalendar for MS CRM 3

Users's Guide

(How to use 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.

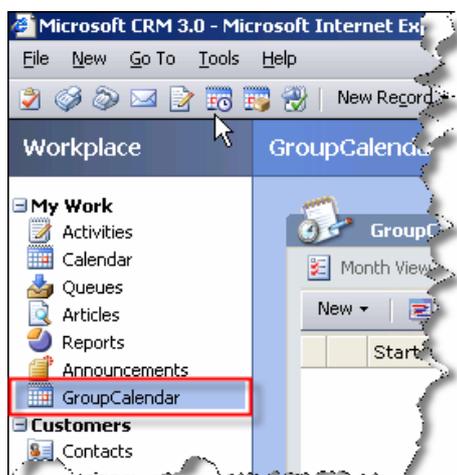
2.1.1 Why you should use GroupCalendar

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.

The screenshot shows the Side Bar interface for the GroupCalendar. It includes a calendar view for April 2006, a 'Select Users' dropdown, an 'Extended Select' section with 'Select Users' and 'Settings' buttons, a 'Users:' section showing 'Christoph Kokely', a 'Which Activities should be shown:' section with checkboxes for Task, Fax, Phone Call, E-mail, Letter, Appointment, and Service Activity, and an 'Options:' section with 'Only attendees:' and 'Only open:' checkboxes, and a 'Print Preview' button.

Callout boxes provide the following explanations:

- Shows the selected day
- Select month and year with a click.
- With a click on the day you can witch to another day.
- 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.
- 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 activities or activities where the choosen users are only attendees.
- Opens a Print Preview Window. Printing is not available in month view.
- With the "Settings" button each user can define his own personal settings of the **GroupCalendar**. (visibility of columns,width of columns,..)
- The checkboxes allows the user to select activity-type should be visible in the GroupCalendar.
- Click this button to select more then one user. This is helpful to see the activities of user1, user2,.. at the same time.

2.4 Personal settings

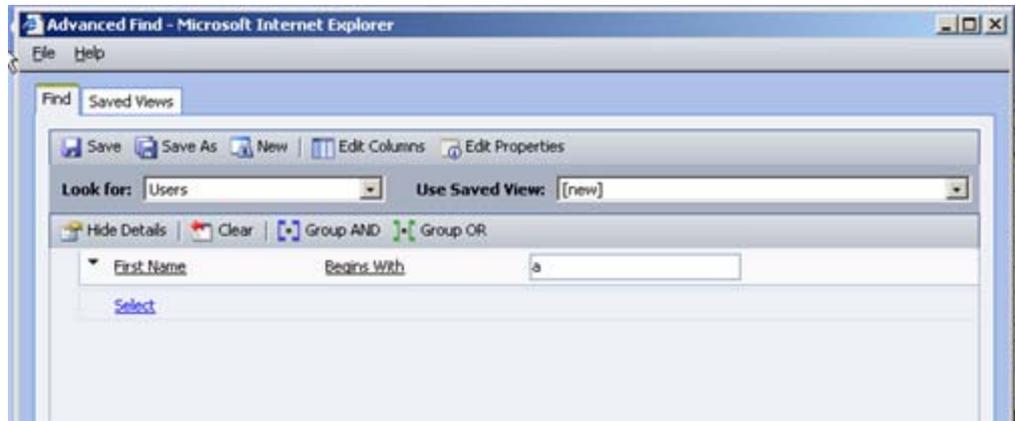
With clicking the "Settings"-Button on the Side-Bar each user can configure the look and feel of the GroupCalendar as he wants.

What can be defined in the settings:

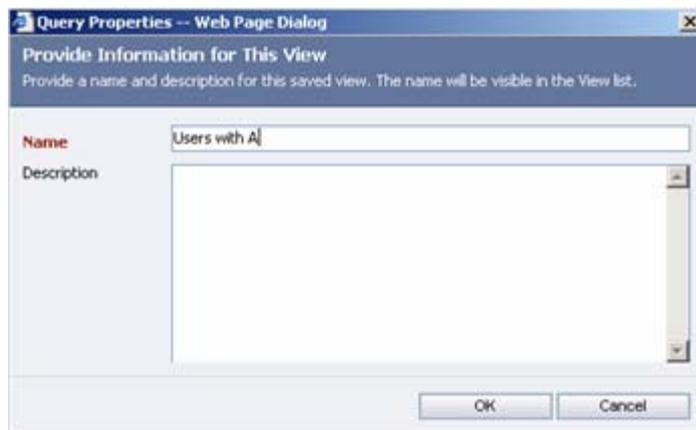
- Default view when opening the GroupCalendar.
- Column-width
- Columns visible
- Default user/group selection when opening the GroupCalendar
- Default filter criterias of the side-bar
- ..

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.



- 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"

The screenshot shows the Microsoft CRM 3.0 GroupCalendar interface. The main window displays a calendar for Tuesday, 11.04.2006. The calendar is in a list view showing activities with columns for Start, End, Subject, State, Regarding, Attendees/Resources, and Organizer/Custom. The activities listed are:

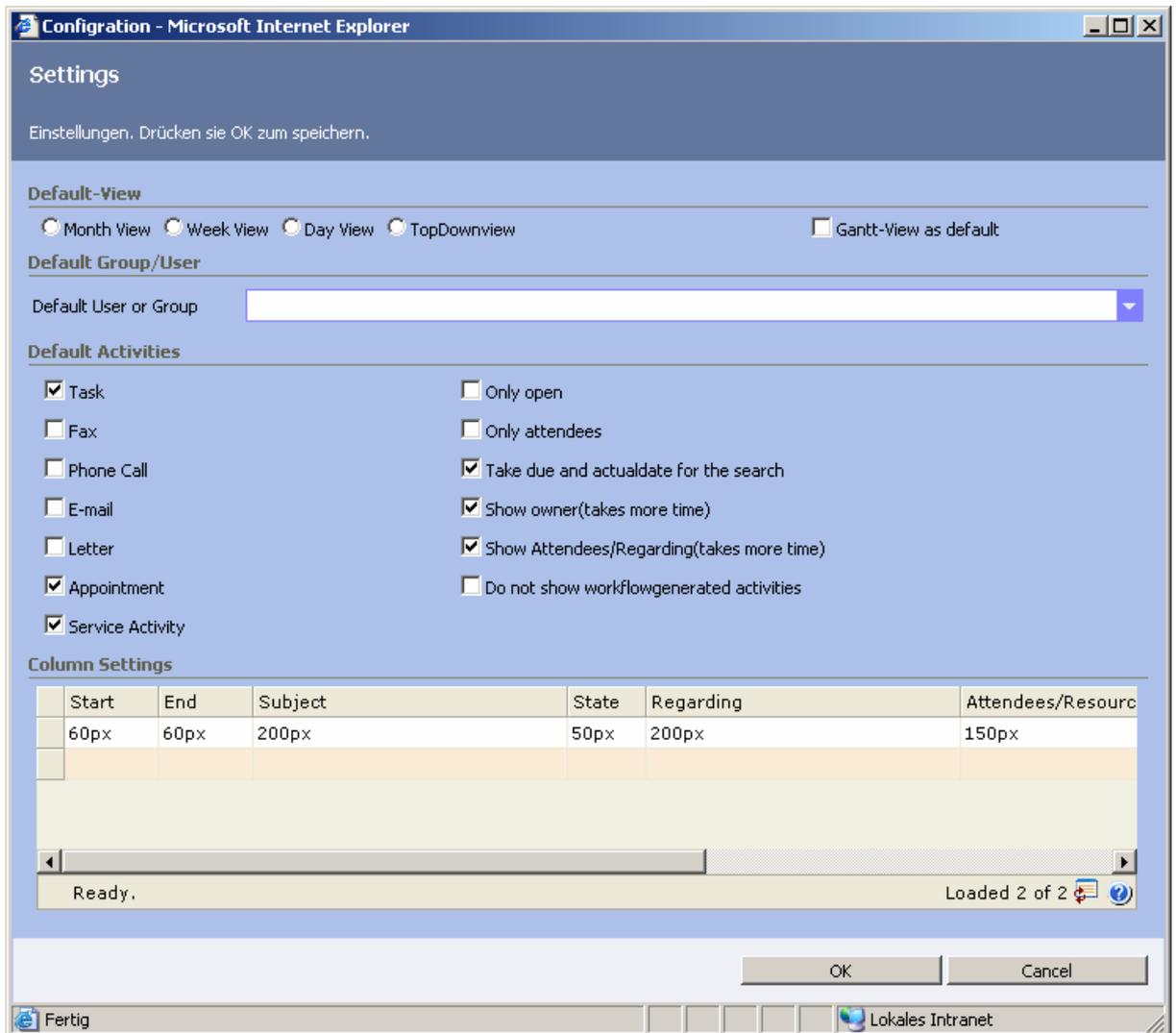
Start	End	Subject	State	Regarding	Attendees/Resources	Organizer/Custom
00:45	01:15	TRIAL:Meeting	Open	-	Ben Burton;Alan Jackson	Connie Watson
08:00	08:30	TRIAL:Team training	Sched...	-	Connie Watson;Active ...	Christoph Kokely
09:30	11:30	TRIAL:Service Date	Sched...	-	Michael Dohr	All Cycle Shop
12:30	12:30	TRIAL:Do Sales List	Open	All Cycle Shop	-	-
13:30	13:30	TRIAL:Calling America	Open	-	-	-

The 'Select Users' dropdown menu is open, showing a list of users. The 'All Users with A' option is highlighted with a red box. The list includes:

- All Users with A
- All Users not K
- Alan Jackson
- Ben Burton
- Christoph Kokely
- Connie Watson
- First name Last name
- Gail Erickson
- Jose Curry
- Michael Dohr

The interface also shows a sidebar with navigation options like My Work, Customers, and Extensions, and a right-hand panel with settings for 'Which Activities should be shown' and 'Options'.

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 an 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 in descending order.

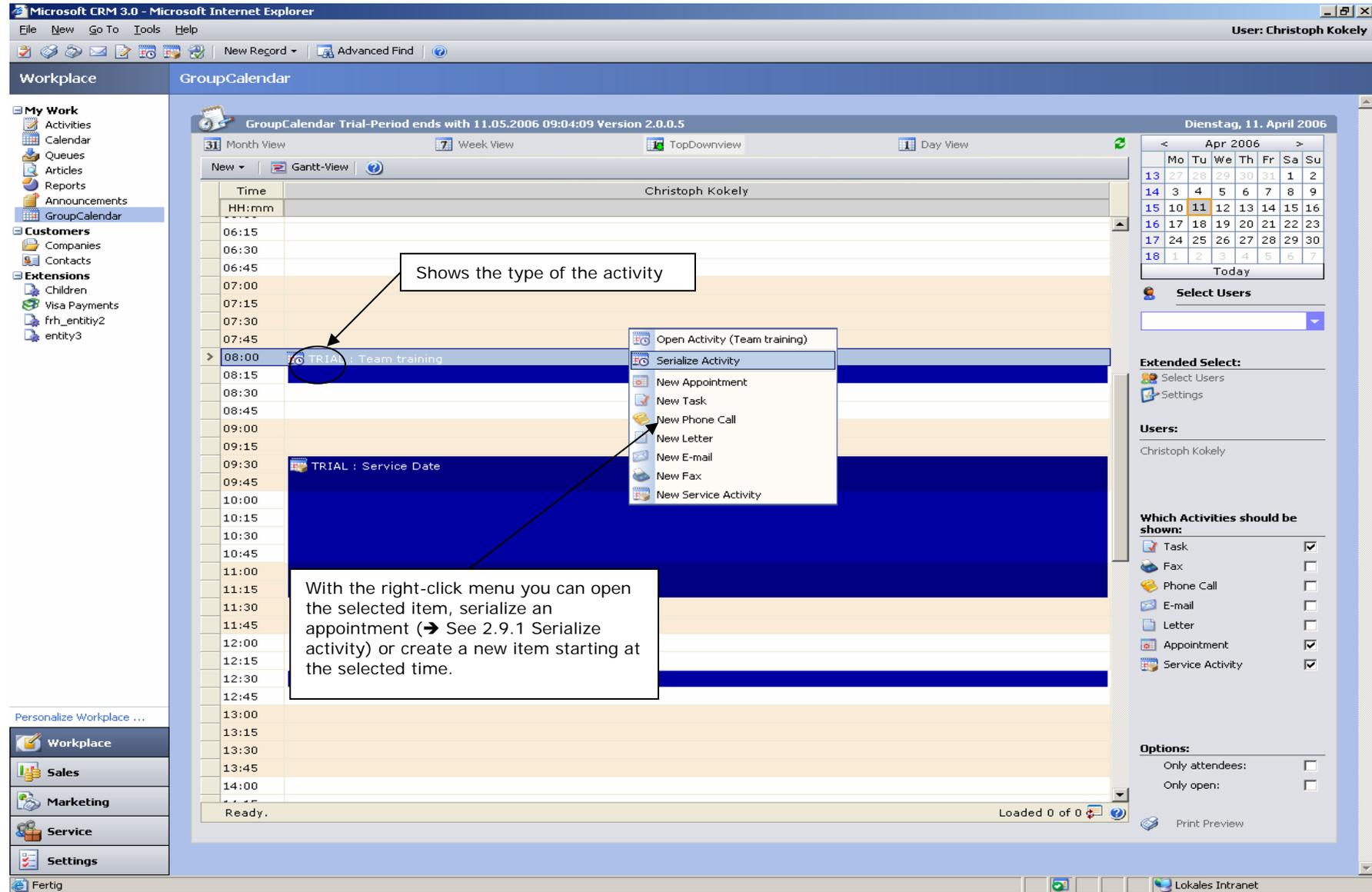
The screenshot shows the Microsoft CRM 3.0 GroupCalendar interface in Day View. The main window displays a list of activities for Tuesday, April 11, 2006. The interface includes a navigation pane on the left, a main activity list, and a right-hand sidebar with a calendar and settings. Callouts provide the following information:

- Change between Day-, Week-, Month - View:** Points to the view selection buttons (Month View, Week View, Day View).
- Shows the Attendees / Resources of the activity:** Points to the 'Attendees/Resources' column in the activity list.
- Shows the Organizer / Customer of the activity:** Points to the 'Organizer/Custom' column in the activity list.
- Shows the type of the activity:** Points to the 'Subject' column header.
- Choose the type of activity you want to create:** Points to the 'New' button.
- With a click you can view the regarding record:** Points to the 'All Cycle Shop' link in the 'Regarding' column.
- Select the user from whom you want to see the activities:** Points to the 'Select Users' dropdown in the sidebar.
- Each user can set preferences for column width, visible columns, filter, ...:** Points to the 'Settings' button in the sidebar.

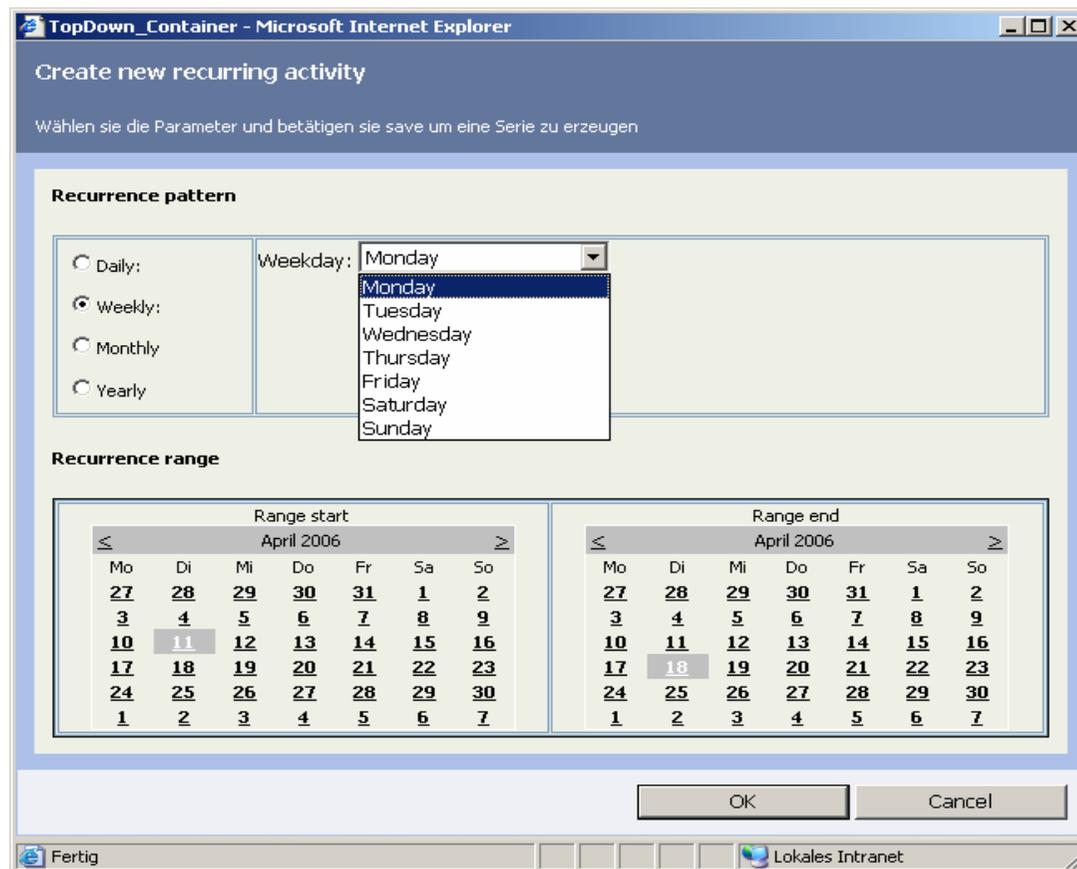
Start	End	Subject	State	Regarding	Attendees/Resources	Organizer/Custom
00:45	01:15	TRIAL:Meeting	Open		Ben Burton;Alan Jackson	Connie Watson
08:00	08:30	TRIAL:Team training	Sched...		Connie Watson;Active ...	Christoph Kokely
09:30	11:30	TRIAL:Service Date	Sched...		Michael Dohr	All Cycle Shop
12:30	12:30	TRIAL:Do Sales List	Open			

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

The screenshot displays the Microsoft CRM 3.0 GroupCalendar interface. The main window shows a week view for April 2006, with activities listed in a table. Annotations include:

- A callout box pointing to the "Gantt-View" button in the top navigation bar: "Change to the Gantt-View."
- A callout box pointing to the "Monday, 10.04.2006" header: "Day of the week."
- A callout box pointing to a right-click context menu over an activity: "With the right-click menu you can add Notes or open the regarding object". The menu options are "Open Activity", "Open Regarding", and "New Note".

The interface includes a left-hand navigation pane with sections like "My Work", "Customers", and "Extensions". The right-hand pane shows a calendar grid for April 2006, a "Select Users" dropdown, and a list of activities to be shown (Task, Fax, Phone Call, E-mail, Letter, Appointment, Service Activity) with checkboxes.

Start	End	Subject	State	Regarding	Attendees/Resources	Organizer/Custom
Monday, 10.04.2006						
11:00	12:00	TRIAL:See CEO	Open	-		
Tuesday, 11.04.2006						
00:45	01:15	TRIAL:Meeting	Open	-	Ben Burton; Alan Jackson; Connie Watson	
08:00	08:30	TRIAL:Team training	Sched...	-	Connie Watson; Active ...	Christoph Kokely
09:30	11:30	TRIAL:Service Date	Sched...	-	Michael Dohr	All Cycle Shop
12:30	12:30	TRIAL:Do Sales List	Open	-		All Cycle Shop
Wednesday, 12.04.2006						
00:45	01:15	TRIAL:Team Meeting	Open	-	Gail Erickson; First nam...	Michael Dohr
Thursday, 13.04.2006						
00:45	01:15	TRIAL:Private appointment	Open	-		

2.9 Month-View

The screenshot displays the Microsoft CRM 3.0 GroupCalendar interface. The main window shows a month view for April 2006. The interface includes a navigation pane on the left with sections like 'My Work', 'Customers', and 'Extensions'. The main calendar area shows activities for each day. Annotations with arrows point to specific features:

- Annotation 1:** Points to an activity on March 27th (00:00 Midnight test) with the text: "With a click on the activity you can open the activity."
- Annotation 2:** Points to an activity on March 18th (00:45 test again) with the text: "With a click on the day-number you can switch to the Day-View".
- Annotation 3:** Points to an activity on March 13th (00:45 Team Meeting) with a callout box containing:


```

            APPOINTMENT
            00:45-01:15 Team Meeting
            STATE: Open
            OWNER: Christoph Kokely
            ATTENDEES/RESOURCES:
            Gail Erickson(User);First name Last name(User);Jose Curry(User)
            ORGANIZER/CUSTOMER:
            Michael Dohr
            
```
- Annotation 4:** A larger callout box on the right side of the calendar contains the text: "You only need to move the cursor on the activity and you get nearly every information of the activity. Activity-Type Regarding Attendees Organizer".

The right-hand sidebar contains a 'Select Users' dropdown, an 'Extended Select' section with 'Select Users' and 'Settings' options, a 'Users:' section listing 'Christoph Kokely', and a 'Which Activities should be shown:' section with checkboxes for Task, Fax, Phone Call, E-mail, Letter, Appointment, and Service Activity. The 'Options:' section includes 'Only attendees:' and 'Only open:' checkboxes, and a 'Print Preview' button.

2.10 Gantt-View

The screenshot shows the Microsoft CRM 3.0 GroupCalendar interface. The main window displays a Gantt view of an appointment for Christoph Kokely on 11.04.2006 from 08:00 to 08:30. A callout box points to the 'List-View' button in the top navigation bar, stating: "Change to List-View / Gantt-View". Another callout box points to the appointment details, stating: "You only need to move the cursor on the activity and you get nearly every information of the activity. Activity-Type Regarding Attendees Organizer". A third callout box points to the color-coded bars in the Gantt view, stating: "Different colours for different types of activities".

Appointment Details:

- APPOINTMENT
- 11.04.2006 08:00-08:30
- Team training
- STATE: Scheduled
- OWNER: Christoph Kokely
- ATTENDEES/RESOURCES: Connie Watson(User); Active Cycling(Company); Amuzing bikes(Company)
- ORGANIZER/CUSTOMER: Christoph Kokely

Right Panel:

- Calendar: Dienstag, 11. April 2006
- Select Users: [Dropdown]
- Extended Select: Select Users, Settings
- Users: Christoph Kokely
- Which Activities should be shown:
 - Task
 - Fax
 - Phone Call
 - E-mail
 - Letter
 - Appointment
 - Service Activity
- Options:
 - Only attendees:
 - Only open:
- Print Preview

3 Contact

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

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