



Group Calendar User Guide for MS CRM 2011

Users Guide
(How to use GroupCalendar for MS CRM 2011)

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1. Welcome

Welcome to the help for **GroupCalendar for MS CRM 2011**. This document will show you the functionality and features of the GroupCalendar.

2. User's Guide

2.1.Introduction

GroupCalendar is an enhancement for Microsoft CRM 2011 that is designed to provide a comprehensive view of all activities associated with a user or a 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 activities in a day-, week- or month-view.

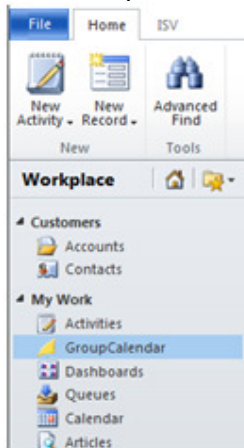
2.1.1.Why you should use GroupCalendar

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.

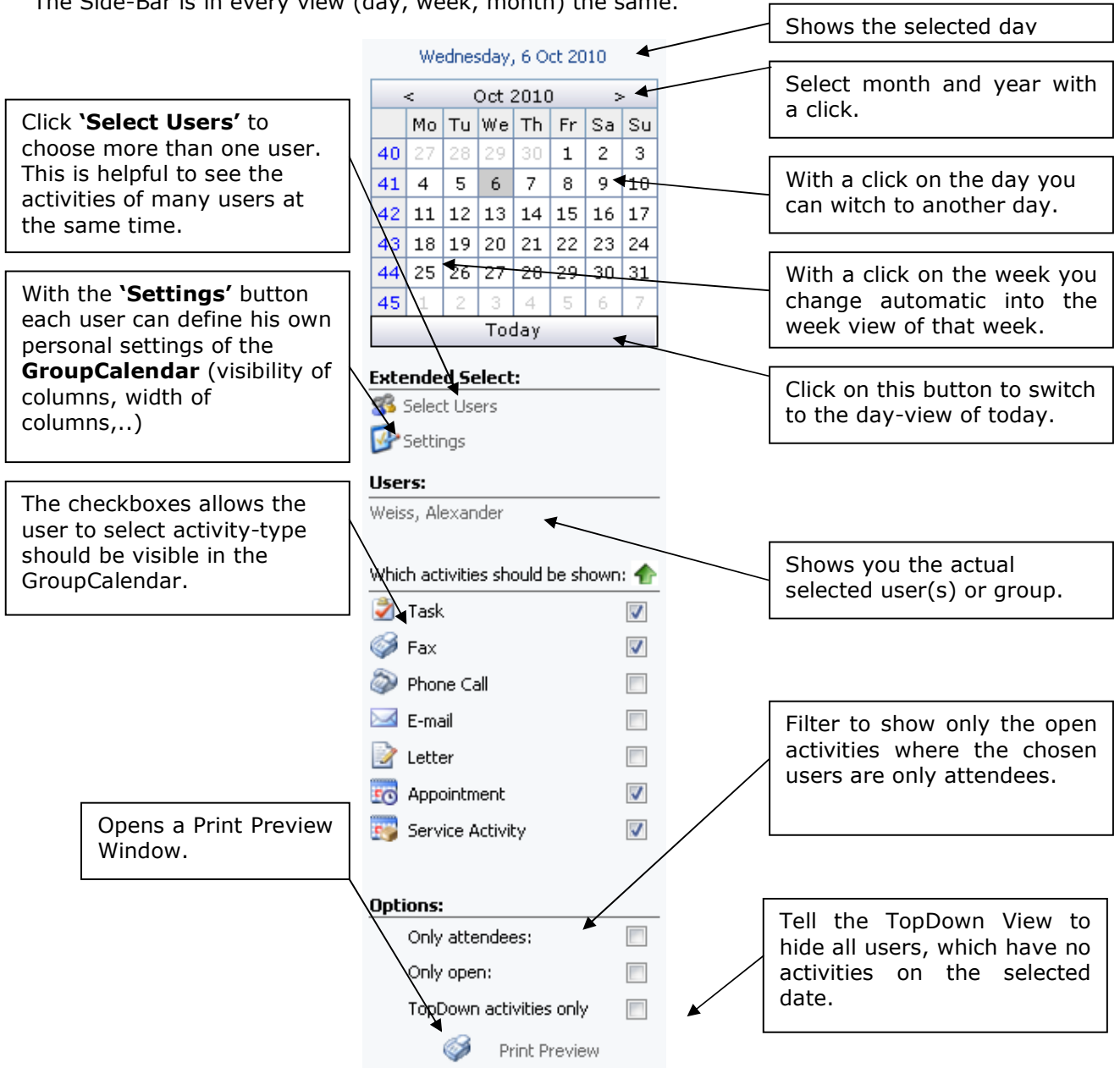
2.2.Using GroupCalendar

To access the **GroupCalendar**, select the side tab button from the HOME of Microsoft CRM 2011. 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 GroupCalendar. It includes a calendar view for October 2010, a list of users, activity filters, and options for displaying activities. Callout boxes provide detailed instructions for each major section.

Calendar View:

- Shows the selected day (Wednesday, 6 Oct 2010)
- Select month and year with a click.
- With a click on the day you can switch to another day.
- With a click on the week you change automatic into the week view of that week.
- Click on this button to switch to the day-view of today.

Extended Select:

- Click **'Select Users'** to choose more than one user. This is helpful to see the activities of many users at the same time.
- With the **'Settings'** button each user can define his own personal settings of the **GroupCalendar** (visibility of columns, width of columns,..)

Users:

- Shows you the actual selected user(s) or group.
- Shows the selected user: Weiss, Alexander

Which activities should be shown:

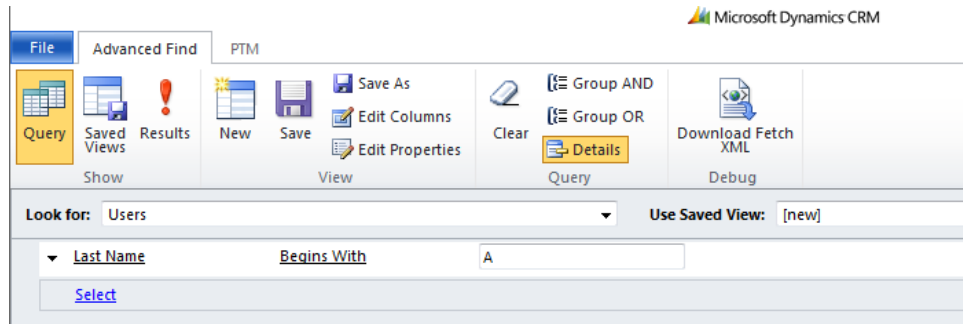
- Filter to show only the open activities where the chosen users are only attendees.
- Task
- Fax
- Phone Call
- E-mail
- Letter
- Appointment
- Service Activity

Options:

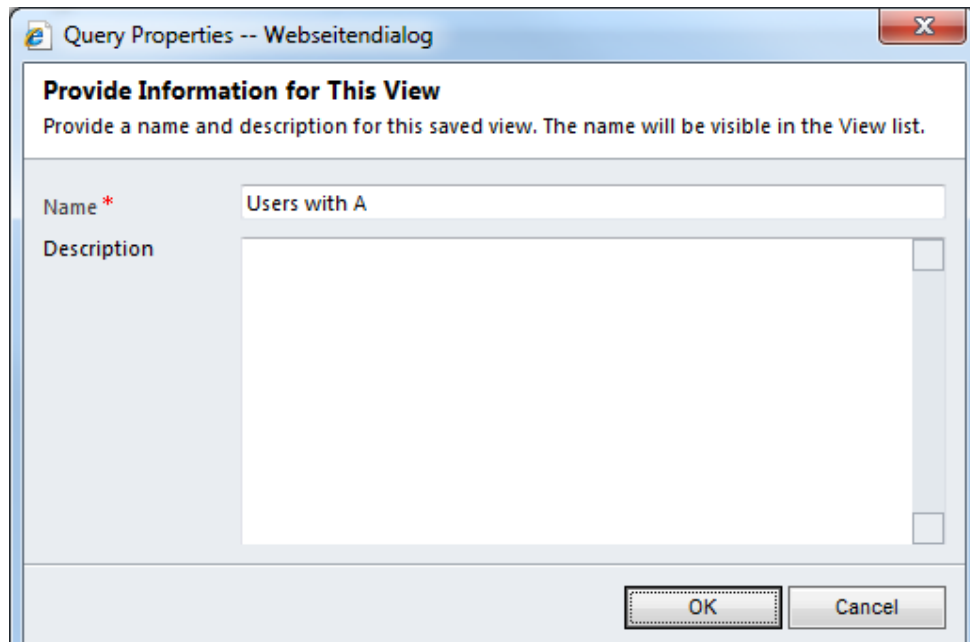
- Only attendees:
- Only open:
- TopDown activities only
- Opens a Print Preview Window.
- Tell the TopDown View to hide all users, which have no activities on the selected date.

2.4. Define Groups

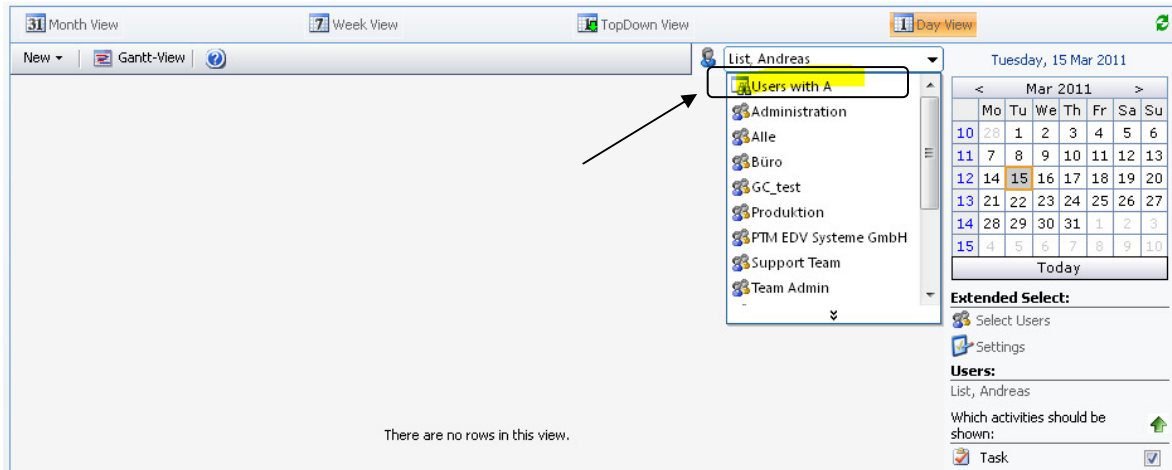
1. Open Advanced Find in MS CRM :
2. Change in the "Look For" Drop-Down-Listbox the type to "Users" and select the criteria's for the group of users you want to define.



3. Click '**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". Maybe you have to refresh to user list. To do this, click on the icon to the left of the drop-down list box.



2.5.Default Settings

Click the '**Settings**' button on the Side-Bar to configure the look and feel of the GroupCalendar.

Options:

- Default view when opening the GroupCalendar
- Column-width
- Column order
- Default user/group selection when opening the GroupCalendar
- Default filter criteria of the side-bar

Settings

Settings dialog. Press OK to save.

Default-View

Month View
 Week View
 Day View
 TopDown View
 Gantt-View as default

Default Group/User

Default User or Group:

Default Activities

<input checked="" type="checkbox"/> Task	<input type="checkbox"/> Only open
<input type="checkbox"/> Fax	<input type="checkbox"/> Only attendees
<input type="checkbox"/> Phone Call	<input checked="" type="checkbox"/> Use start and due date for the search
<input type="checkbox"/> E-mail	<input checked="" type="checkbox"/> Show owner (takes more time)
<input type="checkbox"/> Letter	<input checked="" type="checkbox"/> Show Attendees/Regarding (takes more time)
<input checked="" type="checkbox"/> Appointment	<input type="checkbox"/> Do not show workflow generated activities
<input checked="" type="checkbox"/> Service Activity	<input type="checkbox"/> TopDown view shows users with activities only

Column Settings (Sort and Width)

Start	End	Subject	State	Regarding	Attendees/Resources
60px	60px	200px	50px	200px	150px

< >

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

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.

You could also double-click a column and enter the specific width for the column in pixel.

2.6.Day View

This page provides 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 displays the GroupCalendar for MS CRM 2011 interface. The main window shows a calendar view for Wednesday, March 9, 2011. The interface includes a navigation bar at the top with options for File, Home, and ISV. Below this is a toolbar with buttons for New Activity, New Record, and Advanced Find. The main workspace contains a list of activities for the selected date, with columns for Start, End, Subject, State, Regarding, Attendees/Resources, and Organizer. A dropdown menu is open for the Organizer field, showing the user 'Weiss, Alexander'. To the right of the calendar is a calendar grid for the month of March 2011. Below the calendar grid is an 'Extended Select' section with checkboxes for various activity types (Task, Fax, Phone Call, E-mail, Letter, Appointment, Service Activity) and an 'Options' section with checkboxes for 'Only attendees', 'Only open', and 'TopDown activities only'. A 'Print Preview' button is also visible.

Annotations in the image include:

- A callout box pointing to the 'Day View' button in the top navigation bar: "Change between Day-, Week-, Month - View".
- A callout box pointing to the 'Organizer' dropdown menu: "Shows the Organizer / Customer of the activity".
- A callout box pointing to the 'New' button in the activity list: "Choose the type of activity you want to create."
- A callout box pointing to the 'Subject' column header: "Shows the type of the activity".
- A callout box pointing to the 'Attendees/Resources' column header: "Select the user from whom you want to see the activities".

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

Shows the type of the activity

With the right-click menu you can open the selected item, create a new item starting at the selected time or delete the selected activity.

You can easily drag and drop your appointments to reschedule

Month View | Week View | **TopDown View** | Day View

New | Gantt-View | Weiss, Alexander | Wednesday, 9 Mar 2011

Mar 2011						
Mo	Tu	We	Th	Fr	Sa	Su
10	28	1	2	3	4	5
11	7	8	9	10	11	12
12	14	15	16	17	18	19
13	21	22	23	24	25	26
14	28	29	30	31	1	2
15	4	5	6	7	8	9
Today						

Extended Select:

- Select Users
- Settings

Users:

Weiss, Alexander

Which activities should be shown:

- Task
- Fax
- Phone Call
- E-mail
- Letter
- Appointment
- Service Activity

Options:

- Only attendees:
- Only open:
- TopDown activities only
- Print Preview

2.8. Week View

The screenshot displays the MS CRM 2011 GroupCalendar interface in Week View. At the top, there are navigation tabs for Month View, Week View (selected), TopDown View, and Day View. Below the tabs, there is a 'New' button, a 'Gantt-View' button (circled in red), and a user selection dropdown for 'Weiss, Alexander'. The main area shows a calendar grid for March 2011, with a callout box 'Change to the Gantt-View.' pointing to the 'Gantt-View' button. A specific date, 'Wednesday, March 09, 2011 (1)', is highlighted in blue, with a callout box 'Day of the week' pointing to it. Below the calendar, there is a table with columns for Start, End, Subject, State, and Regarding. A task is listed for 'Wednesday, March 09, 2011 (1)' with a start time of 15:00 and an end time of 19:30, with the subject 'Backup Server 2' and state 'Schedul...'. The right sidebar contains a calendar for March 2011, an 'Extended Select' section with 'Select Users' and 'Settings' buttons, a 'Users' section with 'Weiss, Alexander', 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 checkboxes for 'Only attendees:', 'Only open:', and 'TopDown activities only'. There is also a 'Print Preview' button at the bottom of the sidebar.

2.9. Month-View

The screenshot displays the MS CRM 2011 GroupCalendar interface in Month-View. The calendar grid shows the month of March 2011, with days of the week (Mon, Tue, Wed, Thu, Fri, Sat/Sun) and dates (Feb 21, Mar 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, Apr 1, 2, 3). A callout box points to an activity on Wednesday, March 9, at 15:00, titled "Backup Server 2". Another callout box points to the date "9" in the calendar grid. A third callout box points to the "Extended Settings" panel on the right, which includes options for "Users" (Weiss, Alexander), "Which activities should be shown:" (Task, Fax, Phone Call, E-mail, Letter, Appointment, Service Activity), and "Options:" (Only attendees, Only open, TopDown activities only, Print Preview).

With a click on the activity you can open the activity.

With a click on the day-number you can switch to the Day-View

Hover the cursor over the activity for a preview of critical information such as:
Activity-Type
Regarding
Attendees
Organizer

2.10. Gantt-View

Different colors display for different types of activities

Hover the cursor over the activity for critical data such as:
Activity-Type
Regarding
Attendees
Organizer

Drag and drop all activities. You could change the time of the activity and also the user.



3. Contact

If you have questions to the product send a Email to support@c360.com