GroupCalendar for MS CRM 1.2

Version 1.5.4

Users's Guide

(How to use GroupCalendar for MS CRM 1.2)

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1   Welcome

Welcome to the help for **GroupCalendar 1.5 for MS CRM 1.2**. 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 1.2 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-, month- 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
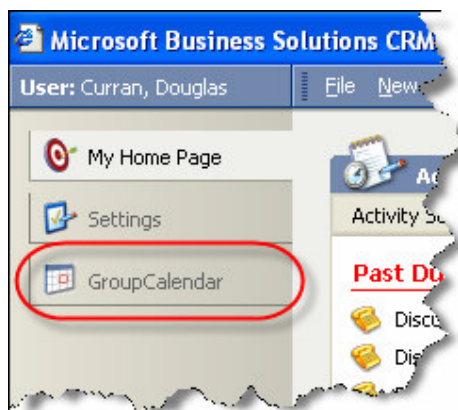
side tab button from the HOME of Microsoft CRM 1.2. When you open the GroupCalendar the first time you will see the activities from today.

2.3   Side Bar

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

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

With the "Settings"-Button each user can define his own personal settings of the **GroupCalendar**. Visible columns, widht of the columns, define groups,..

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

To add a new activity you can choose the typ in the dropdownlist box and click "OK".

Shows the selected day.

Selecte 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 autom. into the week view of this week.

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

This dropdown listbox 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 where the choosen users are only attendees.

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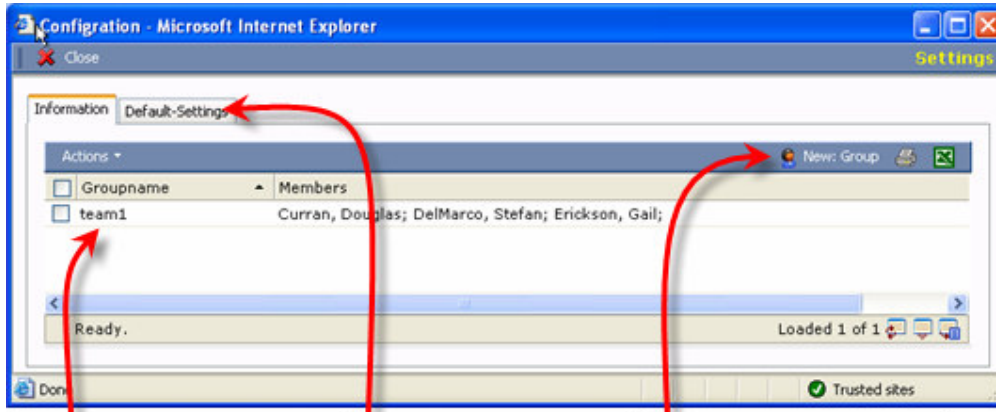
With clicking the "Settings"-Button on the Side-Bar each user can configure the look and feel of the GroupCalendar as he wants.
What can be defined in the settings:

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

2.4.1 Define Groups

After clicking the "Settings"-Button you will see the following window:
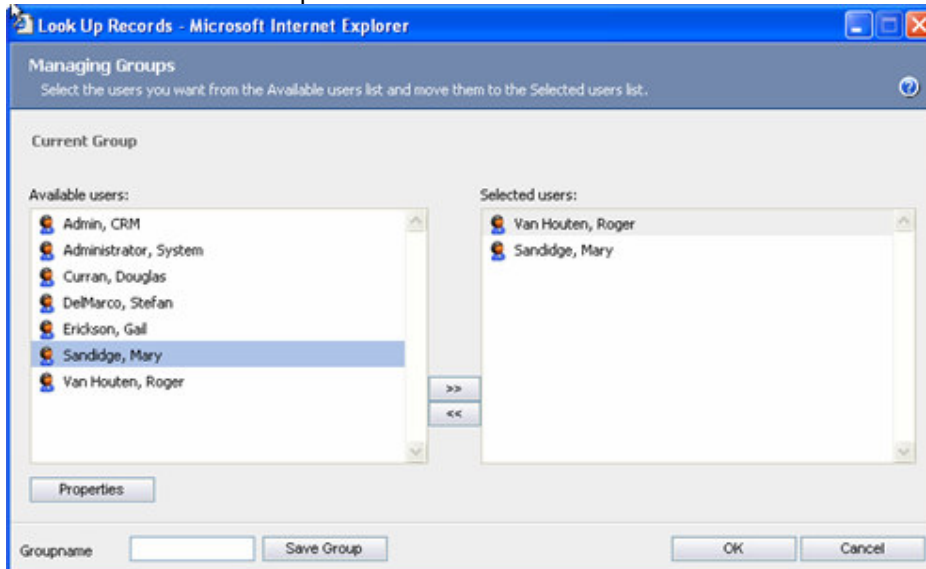
Click on the "New Group"-Button

It is now possible to select the users which should be in a group. Then enter a Groupname and click OK

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.

Enter the "1" into the column which should be at the far right. Enter "2" into the column which should be next and so on.

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 Week-View

2.8   Month-View

3   Contact

If you have questions to the product send a Email to
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