



GroupCalendar for MS CRM 1.2

Version 1.5.4

Users's Guide

(How to use GroupCalendar for MS CRM 1.2)

Table of Contents

1	WELCOME	3
2	USER'S GUIDE	4
2.1	Introduction	4
2.2	How to Use	4
2.3	Side Bar	5
2.4	Personal settings	5
2.5	Default Settings	7
2.6	Day-View	8
2.7	Week-View	9
2.8	Month-View	10
3	CONTACT	11

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.

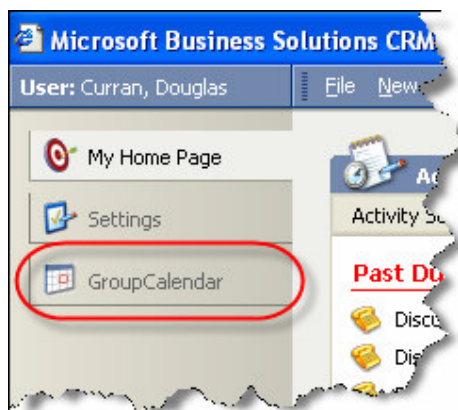
2.1.1 Why you should use GroupCalendar

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.

The screenshot shows the GroupCalendar interface with a calendar view for June 2005. The side bar contains several controls: a 'Select Users' dropdown, a 'Settings' button, a list of activity types with checkboxes, and options for filtering activities. Red arrows point from text boxes to these controls.

Annotations for the side bar controls:

- 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

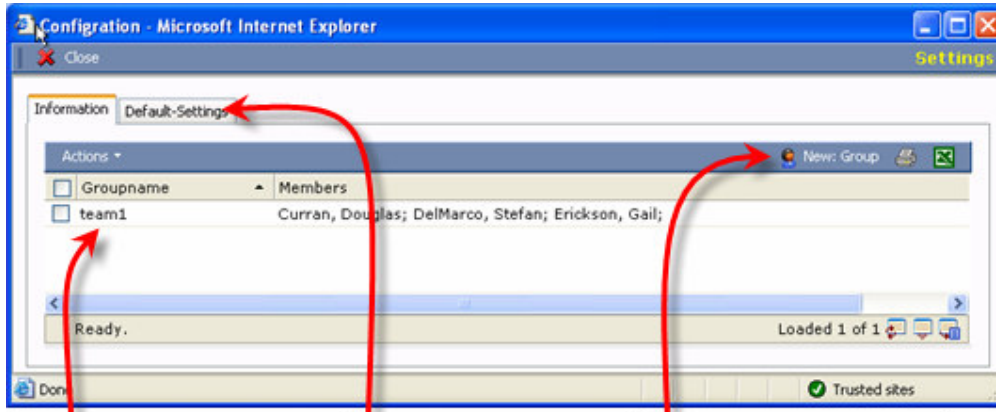
With clicking the "Settings"-Button on the Side-Bar each user can configure the look and feel of the GroupCalendar as he wants.

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:



Configuration - Microsoft Internet Explorer

Close Settings

Information Default-Settings

Actions -

Groupname	Members
team1	Curran, Douglas; DelMarco, Stefan; Erickson, Gail;

Ready. Loaded 1 of 1

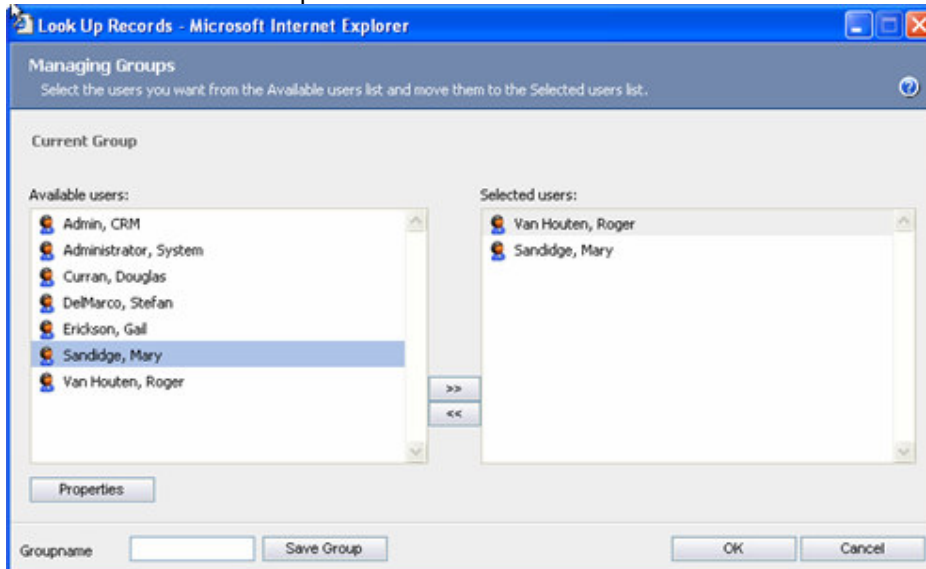
Trusted sites

List of created groups of users.

Select this tab-page to configure the default view and filter criterias.

Create a new group of users with this button.

Click on the "New Group"-Button



Look Up Records - Microsoft Internet Explorer

Managing Groups

Select the users you want from the Available users list and move them to the Selected users list.

Current Group

Available users:

- Admin, CRM
- Administrator, System
- Curran, Douglas
- DelMarco, Stefan
- Erickson, Gail
- Sandidge, Mary
- Van Houten, Roger

Selected users:

- Van Houten, Roger
- Sandidge, Mary

Properties

Groupname Save Group OK Cancel

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

Configuration - Microsoft Internet Explorer

Close Settings

Information Default-Settings

Save

Default-View

Month View Week View Day View

Default Group/User

Default User or Group

Default Activities

Task Only open

Fax Only attendees

Phone Call Take due and actualdate for the search

Email Show owner(takes more time)

Letter Show Attendees/Regarding(takes more time)

Appointment Do not show workflowgenerated activities

Column Settings (Sort and Width)

Columnname	Sort	Width
Start	1	60
End	2	60
Subject	3	200
State	4	50
Owner	8	150
Regarding	5	200
Attendees	6	300
Organizer	7	0

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 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 GroupCalendar 1.5.3.0 application window. The main area displays a list of activities in a table view. Annotations include:

- "You have the possibility change between Day-, Week-, Month-View" pointing to the view selection buttons at the top.
- "Shows you the Attendees of activities." pointing to the Attendees column in the table.
- "Select the user from whom you want to see the activities." pointing to the "Select Users" dropdown menu.
- "Shows the type of activity" pointing to the "Quick Create" section at the bottom left.
- "With a click you can view the regarding record." pointing to the "Regarding" column in the table.
- "Choose the type of activity you want to create and click OK." pointing to the "New:" dropdown menu at the bottom right.
- "Each user can set preferences for column width, visible columns, filter, start view (day, week, month)" pointing to the "Settings" button in the right-hand panel.

Start	End	Subject	State	Regarding	Attendees
Tuesday, April 26, 2005					
15:00	15:30	inform about new terms	Open	Bold Bike Accessories	Alpuerto, Oscar
Wednesday, April 27, 2005					
10:00	10:30	Internal Conference	Open	-	Sandidge, Mary; DelMarco
12:00		Ask if all is ok	Open	Active Cycling	
13:00	13:30	inform about new products	Open	Next-Door Bike Store	Abbas, Syed
Thursday, April 28, 2005					
09:00		Send quote about 12 Bikes	Open	Bischoff, Jimmy	
Sunday, May 01, 2005					
00:00	23:59	Visit customer Active Cycling	Open	Active Cycling	

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

Microsoft Business Solutions CRM - Microsoft Internet Explorer

User: Curran, Douglas

GroupCalendar Version 1.5.3.0

Wednesday, April 27, 2005

Start	End	Subject	State	Regarding	Attendees
10:00	10:30	Internal Conference	Closed		Sandidge, Mary;DelMarco
12:00		Ask if all is ok	Open	Active Cycling	
13:00	13:30	inform about new products	Closed	Next-Door Bike Store	Abbas, Syed

Open Activity
Open Regarding
New Note

Quick Create
Contact
Go

Select Users
Extended Select:
Settings
Users:
Curran, Douglas
Which Activities should be shown:
Task
Fax
Phone Call
Email
Letter
Appointment
Options:
Only attendees:
Only open:
New:
Appointment
OK

Home My Home page
Workplace My Work, Calendar
Sales Sales Automation
Service Customer Service
Reports Metrics, Statistics

Every user can change the column settings (width, visibility)

With the right-button menu you can add **NOTES** to the selected activity.

With one click you can open the regarding(account, contact, lead,..)

2.8 Month-View

Microsoft Business Solutions CRM - Microsoft Internet Explorer
User: Curran, Douglas

GroupCalendar Version 1.5.3.0
Month View | Week View | Day View

Overview:
Apr 2005

Mo	Tu	We	Th	Fr	Sa	Su
28.Mar	29.Mar	30.Mar	31.Mar	1	2	3
4	5	6	7	8 11:00 New Bikes	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26 15:00 inform about new terms	27 10:00 Internal Conference 12:00 Ask if all ok 13:00 inform	28 09:00 Send quote about 12 Bikes	29	30	1.May
2.May	3.May	4.May	5.May	6.May	7.May	8.May
Visit customer Active Cycling	Visit customer Active Cycling	Visit customer Active Cycling	Visit customer Active Cycling	Visit customer Active Cycling	Visit customer Active Cycling	Visit customer Active Cycling

APPOINTMENT
11:00-11:30 New Bikes
STATE: Open
OWNER: Curran, Douglas
REGARDING: FIFTH BIKE STORE
ACCOUNT: Fifth Bike Store
ATTENDEES: Berch, Marian; Bischoff, Jimmy
ORGANIZER: Curran, Douglas

Select Users
Extended Select:
Users: Curran, Douglas
Which Activities should be shown:
Task
Fax
Phone Call
Email
Letter
Appointment
Options:
Only attendees:
Only open:
New: Appointment OK

Quick Create
Contact
Go

Home My Home page | Workplace My Work, Calendar | Sales Sales Automation | Service Customer Service | Reports Metrics, Statistics

You only need to move the cursor on the activity and get nearly every information of the activity.

Activity-Type Regarding Attendees Organizer

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

That's the look of a activity which duration is longer then a day

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

3 Contact

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

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