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Your company for MS-CRM ADD-ONS!

Scheduling in Microsoft Dynamics CRM made
easy

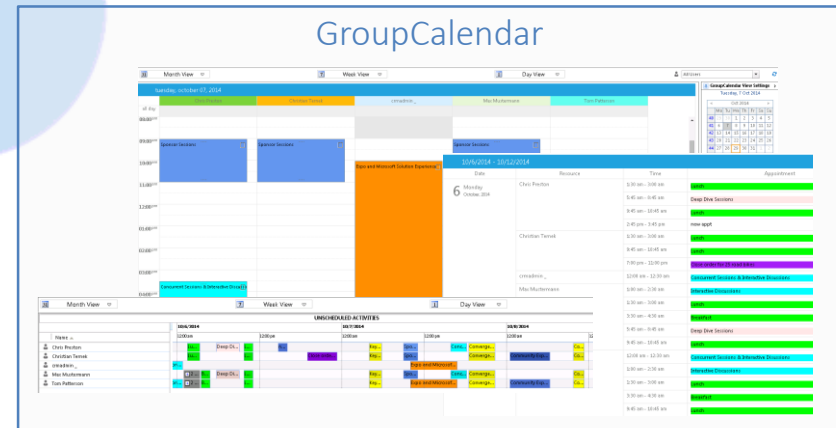
GroupCalendar

Simple scheduling Tool for Microsoft Dynamics CRM

Users – Facilities - Teams - Resources

Why would I use it?






- **Effective Team scheduling**
 - Get an overview of your Team's schedule
 - See availabilities of users and resources
- **Avoid conflicts**
 - Highlighting of overlapping activities
- **Scheduling made easy**
 - Drag & Drop rescheduling
 - See working hours
 - Color coding/highlighting
 - Assigning unscheduled activities and appointments
 - Print calendar
 - ...



Defining teams & resource groups

The key of our GroupCalendar is to define and choose teams, user-groups or resources you want to schedule and need to see the calendar from!

- 1) Advanced Find**
Each user can create his own Advanced Find's that deliver the user-group's he needs to see. E.g.: „West-Coast salespeople“
- 2) Teams**
CRM entity that allows to define teams consisting of various CRM users. E.g. Sales-Teams, Dev-Team, Accounting,...
- 3) Resource Groups**
CRM entity that allows to define resource groups consisting of both users and facilities/equipment. E.g. All Cars and Service-users
- 4) Single Users**
Show calendar of a certain user
- 5) Single Facilities or Equipment**
Show calendar for a certain facility or equipment

All Users		
All Users	1	
All Call Center Standard	2	
All Cars All Cars & Rooms All laptops All Laptops and Beamers All Meeting Rooms	3	
Chris Preston Christian Ternek crmadmin_ Max Mustermann Michael Dohr Tom Patterson	4	
Beamer Car 1 Car 2 Car 3 Laptop 1 Laptop 2 Laptop 3 Laptop 4 Meeting Room 101 Meeting Room 102 Meeting Room 103	5	

Scheduling Features

To simplify scheduling, GroupCalendar has been extended with a bunch of features

1) Drag & Drop

Simply drag & drop activities to different users or change date/time of a certain activity.

2) Planning unscheduled activities

Schedule and assign appointments via Drag & Drop in Gantt view.

The list of „Activities to schedule“ can be global or personalized by each user.

3) Working-hour integration

The calendar can be enabled to show the working-hours and time off defined for CRM-users.

This allows to see available slots in your users calendar easily.

4) Color-Coding

To keep a compact overview, color-coding can be enabled on any CRM-activity (appointments, tasks,..). The colors are supported by all views and thus consist when navigating through your calendar.

5) Print options and customizable settings for each user

Demo Part : Solution & Feature Overview

Topics covered:

- Different views
- Defining Teams & Resource Groups
- Scheduling features
 - Drag & Drop rescheduling
 - Color Coding
 - Working hour integration
- Customizability
- Defining and assigning unscheduled activities

GANTT View

Month View | Week View | Day View | All Users

Service Activities | Appointments

Subject	Scheduled Start	Scheduled End	All Day Eve...	Owner	Created
100 bikes assembly for Discount Bicycle Speci...	9/29/2009 10:00 pm	9/30/2009 10:00 pm	True	Michael Dohr	Michae
Basic tune-up and lubrication	10/28/2009 6:00 pm	10/28/2009 8:30 pm	False	Michael Dohr	Michae
Basic tune-up and lubrication	10/14/2009 1:00 pm	10/14/2009 3:30 pm	False	Michael Dohr	Michae
Basic tune-up and lubrication	10/24/2009 1:00 pm	10/24/2009 4:30 pm	False	Michael Dohr	Michae
Basic tune-up and lubrication	9/30/2009 3:30 pm	9/30/2009 5:30 pm	False	Michael Dohr	Michae

UNSCHEDULED ACTIVITIES

Name	10/6/2014	10/7/2014
Chris Preston	Lu... Deep Di... Lu...	n... Key... Spo...
Christian Ternek	Lu...	Close orde... Key... Spo...
crmadmin_	Dr...	Expo...
Max Mustermann	2... B... Deep Di... Lu... Basic t...	Key... Spo...
Tom Patterson	Dr... 2... B... Lu...	Key... Expo...

GroupCalendar View Settings
Tuesday, 7 Oct 2014

Oct 2014

Mo	Tu	We	Th	Fr	Sa	Su
40	29	30	1	2	3	4
41	6	7	8	9	10	11
42	13	14	15	16	17	18
43	20	21	22	23	24	25
44	27	28	29	30	31	1
45	3	4	5	6	7	8

Today

Extended Select:

Select Users/Resources

Settings

Users:

All Users

Which activities should be shown:

New Activity

- Task
- Fax
- Phone Call
- Email
- Letter
- Appointment
- Service Activity

Options:

Only attendees:

Top Down View

31 Month View | 7 Week View | Day View | All

wednesday, may 1, 2013

	Administrator Administrator	Chris Preston	christian Ternek	Jin Yan	Max Mustermann
all day	Meeting with dev-team		Meeting with dev-team		
08:00 am					
09:00 am		Test Location: LACC 411 Required:			
10:00 am				SC01 High Performance Location: LACC 150B Required:	
11:00 am			DYN20 Microsoft Dynamics CRM Online - Res Location: LACC 408A Required:	SMB03 Selling Window Location: LACC 403A Required:	WEB05 Improve Business Performance with Location: JW Gold Ballroom, Salon 4 Required:
12:00 pm					
01:00 pm					
02:00 pm					
03:00 pm					
04:00 pm					

NEW APPOINTMENT

NEW TASK

NEW PHONE CALL

NEW LETTER

NEW EMAIL

NEW FAX

NEW SERVICE ACTIVITY

GroupCalendar View Settings

Wednesday, 1 May 2013

May 2013						
<	Mo	Tu	We	Th	Fr	Sa
18	29	30	1	2	3	4
19	6	7	8	9	10	11
20	13	14	15	16	17	18
21	20	21	22	23	24	25
22	27	28	29	30	31	1
23	3	4	5	6	7	8
Today						

Extended Select:

Select Users/Resources

Settings

Users:

All

Which activities should be shown:

New Activity

Task

Fax

Phone Call

Email

Letter

Appointment

Service Activity

Options:

Only attendees:

Only open:

TopDown activities only

Print Preview

Agenda View

31 Month View Week View Day View All Users

10/6/2014 - 10/12/2014

Date	Resource	Time	Appointment
6 Monday October, 2014	Chris Preston	1:30 am - 3:00 am	Lunch
		5:45 am - 8:45 am	Deep Dive Sessions
		9:45 am - 10:45 am	Lunch
		2:45 pm - 3:45 pm	new appt
	Christian Ternek	1:30 am - 3:00 am	Lunch
		9:45 am - 10:45 am	Lunch
		7:00 pm - 11:00 pm	Close order for 25 road bikes
	crmadmin_	12:00 am - 12:30 am	Concurrent Sessions & Interactive Disussions
	Max Mustermann	1:00 am - 2:30 am	Interactive Discussions
		1:30 am - 3:00 am	Lunch
		3:30 am - 4:30 am	Breakfast
		5:45 am - 8:45 am	Deep Dive Sessions
9:45 am - 10:45 am		Lunch	
Tom Patterson	12:00 am - 12:30 am	Concurrent Sessions & Interactive Disussions	
	1:00 am - 2:30 am	Interactive Discussions	
	1:30 am - 3:00 am	Lunch	
	3:30 am - 4:30 am	Breakfast	

GroupCalendar View Settings

Tuesday, 7 Oct 2014

Oct 2014

Mo	Tu	We	Th	Fr	Sa	Su
40	29	30	1	2	3	4
41	6	7	8	9	10	11
42	13	14	15	16	17	18
43	20	21	22	23	24	25
44	27	28	29	30	31	1
45	3	4	5	6	7	8

Today

Extended Select:

Select Users/Resources

Settings

Users:

All Users

Which activities should be shown:

New Activity

Task
 Fax
 Phone Call
 Email
 Letter
 Appointment
 Service Activity

Options:

Only attendees:

Only open:

Timeline view

Month View Week View Day View All

	Monday, April 29, 2013	Tuesday, April 30, 2013	Wednesday, May 1, 2013	Thursday, May 2, 2013	Friday, May 3, 2013	Saturday, May 4, 2013	Sunday, May 5, 2013
Chris Preston	06:30am - 04:00pm SMBVK How We Win in SMB Location: JW Platinum Ballroom Required:	07:30am - 01:30pm DYNVKR Be Dynamic: Opportunit Location: LACC Concourse Hall 15 Required:	08:30am - 12:00pm Test Location: LACC 411 Required:		08:15am - 02:15pm TEL08 Microsoft Lync Voice Oppor Location: LACC 150B Required:		
christian Ternek	08:20am - 08:20pm BL01 How to Prepare Now for the Location: JW Diamond Ballroom, S Required:	10:50am - 02:50pm WP06 Windows Phone in the Enter Location: JW Gold Ballroom, Salon Required:	12:00am - 12:00am Meeting with dev-team Required: Christian Ternek		10:30am - 06:00pm BL12 Making the Most of MPN for Location: LACC 153AB Required:		
			10:45am - 05:15pm DYN20 Microsoft Dynamics CRM C Location: LACC 408A Required:				
Jin Yan	07:15am - 03:30pm TEL02 Moving Productivity Applic Location: LACC 511BC Required:	04:15am - 01:30pm WIN13: Windows Licensing and Bus Location: LACC 402B INT Required:	09:00am - 02:30pm SC01 High Performance Computin Location: LACC 150B Required:	06:45am - 01:45pm WEBVK Get Inspired with the Micro Location: JW Gold Ballroom, Salon Required:	05:00am - 11:00am TEL05 Moving Information Worker Location: LACC518 Required:		
			09:45am - 03:45pm SMB03 Selling Windows to SMB: V Location: LACC 403A Required:	05:30pm - 10:30pm BL07 Letting Go to Grow: Building Location: JW Platinum Ballroom Required:	05:30pm - 01:30am WPT01: Enterprise Mobility: When to Target Windows Embedded Hand Location: JW Atrium 1 INT Required:		
Max Mustermann	09:30am - 01:30pm WP02 The Five Things You Need t Location: JW Gold Ballroom, Salon Required:	05:30am - 12:00pm SMB11: Winning SMB Customers v Location: LACC 405 Required:	08:00am - 03:30pm WEB05 Improve Business Performa Location: JW Gold Ballroom, Salon Required:		07:00am - 02:45pm WEB06 Don't Build it from Scratch Location: JW Atrium 3 Required:	10:30am - 04:30pm SMB09 Capture the SMB Desktop Location: LACC 403A Required:	
	01:40pm - 08:25pm WINVK Enabling Today's Flexible V					02:00pm - 07:00pm WIN03 Deploying Windows 7 in th	

GroupCalendar View Settings

Monday, 29 Apr 2013

<	Apr 2013							>
Mo	Tu	We	Th	Fr	Sa	Su		
14	1	2	3	4	5	6	7	
15	8	9	10	11	12	13	14	
16	15	16	17	18	19	20	21	
17	22	23	24	25	26	27	28	
18	29	30	1	2	3	4	5	
19	6	7	8	9	10	11	12	
Today								

Extended Select:

Select Users/Resources

Settings

Users:

All

Which activities should be shown:

New Activity

- Task
- Fax
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- Email
- Letter
- Appointment
- Service Activity

Options:

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

Month View

Month View | Week View | Day View | All Users

oct, 2014

Mon	Tue	Wed	Thu	Fri	Sat	Sun
29 04:15am appt 1	30 tdcp demo 03:00am service act 2	01 Oct 04:45am Service act 1	2	3	4 service act ALL-DAY 5	5 07:00am Breakfast 09:30am Expo and 12:00pm Lunch 04:15pm Opening more...
6 08:30pm Concurrent 01:00am Interactive 01:30am Lunch 03:30am Breakfast more...	7 04:00am Keynote 09:00am Sponsor 10:00am Expo and 03:56pm Concurrent more...	8 12:30am Community 09:45am Convergence 04:00pm Community 06:15pm Adjustment	9	10 02:45pm Appointment	11	12
13	14	15	16	17	18	19
20	21 Adjust brakes and	22	23	24	25	26

GroupCalendar View Settings

Tuesday, 7 Oct 2014

Oct 2014								
<	Mo	Tu	We	Th	Fr	Sa	Su	>
40	29	30	1	2	3	4	5	
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42	13	14	15	16	17	18	19	
43	20	21	22	23	24	25	26	
44	27	28	29	30	31	1	2	
45	3	4	5	6	7	8	9	

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Phone Call

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Service Activity

Options:

Only attendees:

Only open:

Thank You


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- Help-Center (Live-Chat, Support): <http://www.mscrm-addons.com/Support.aspx>
- Don't forget we have an awesome blog at <http://blogs.mscrm-addons.com/>, you'll find it to be a helpful resource!

Contact:

 US: +1 404 720 6066

 Europe: +43 (316) 680 880

 support@mscrm-addons.com

 office@mscrm-addons.com