Monkey Calendar User Guide

Date: 14th December 2016

Version No: 1.0.0.0

Status: Beta
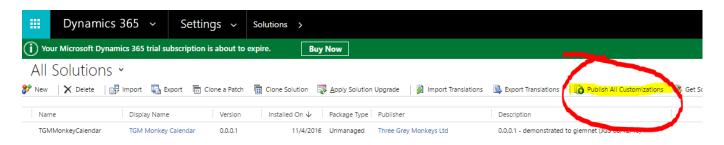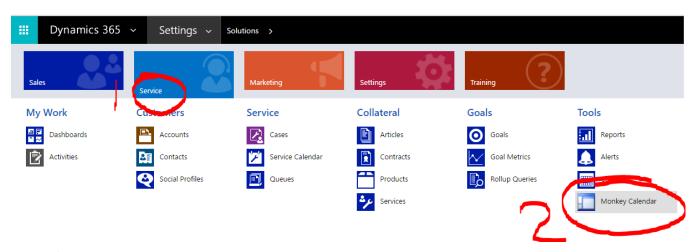

Three Grey Monkeys

Contents

Setup

1. Import solution
2. Publish all customisations

3. Navigate to Service > Monkey Calendar

Appointments

- TGM Monkey Calendar will load appointments from your CRM system
- They can be filtered using CRM views
- TGM Monkey Calendar will always load CRM Appointment records in the same browser window
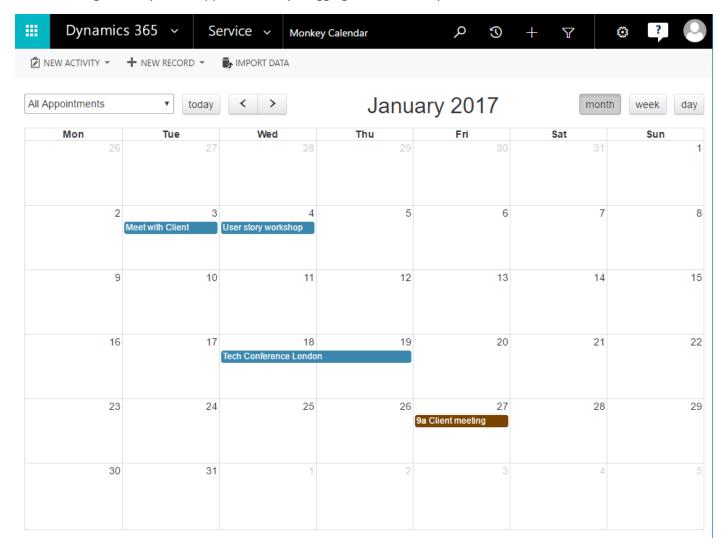
Views

TGM Monkey Calendar supports the following views:
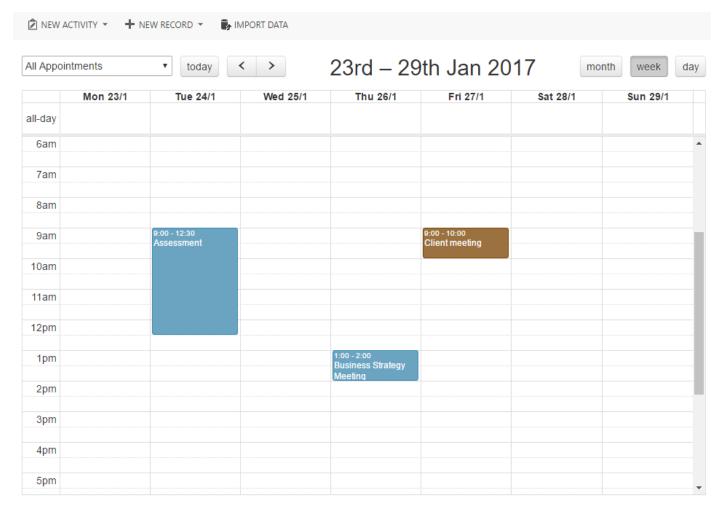
- Month
- Week
- Day

Month

- Single-click on a day to create a new appointment
- By default, all appointments created from this view are all day events
- Cycle the current month forwards or backwards by clicking on the arrow buttons
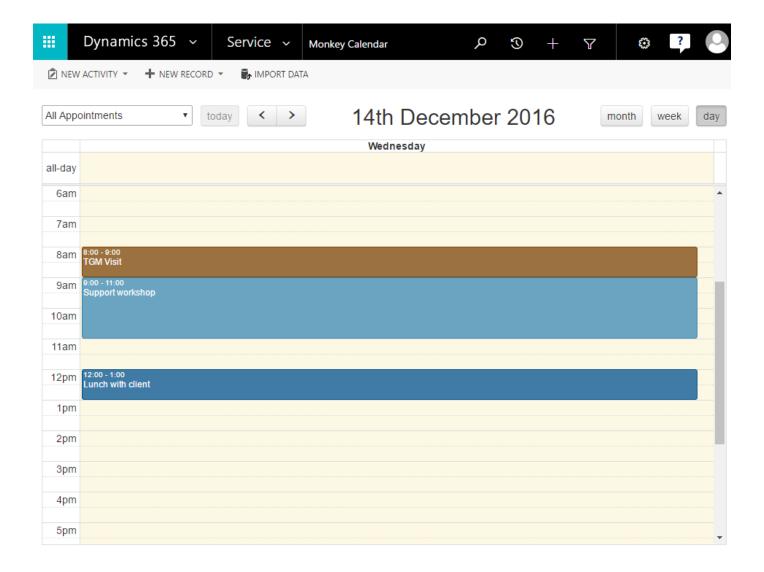- Change the day of the appointment by dragging it from one day to another

Week

- Single click on a time block to create a new appointment
- All day appointments can be created by clicking in one of the all-day cells, located at the top of the week view
- Time-bound appointments can be created by single-clicking in a time block
- Cycle the current week forwards or backwards by clicking on the arrow buttons
- Change the start time of an appointment by dragging it from one time block to another

Day

- Single click on a time block to create a new appointment
- All day appointments can be created by clicking in one of the all-day cells, located at the top of the week view
- Time-bound appointments can be created by single-clicking in a time block
- Cycle the current day forwards or backwards by clicking on the arrow buttons
- Change the start time of an appointment by dragging it from one time block to another
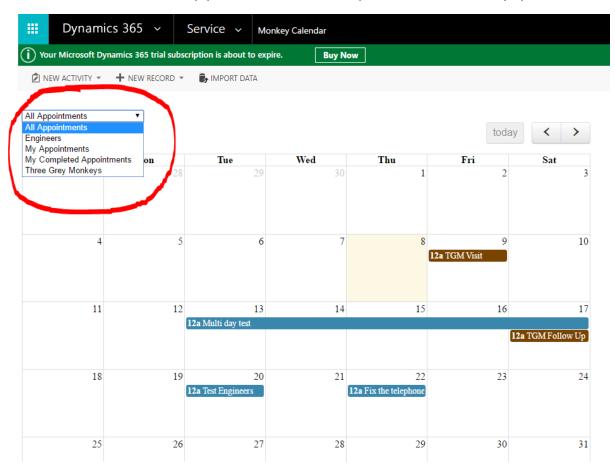
Filtering Appointments

Select a View

TGM Monkey Calendar filters appointments using Dynamics CRM views, which are listed in the picklist shown below. To choose a different filter, simply choose a view from the picklist. This will instantly update the calendar.
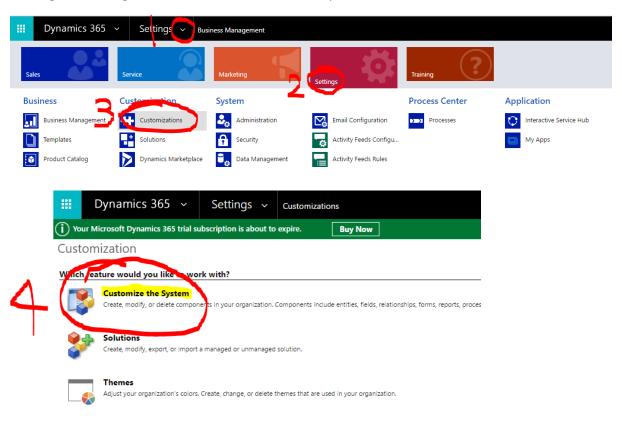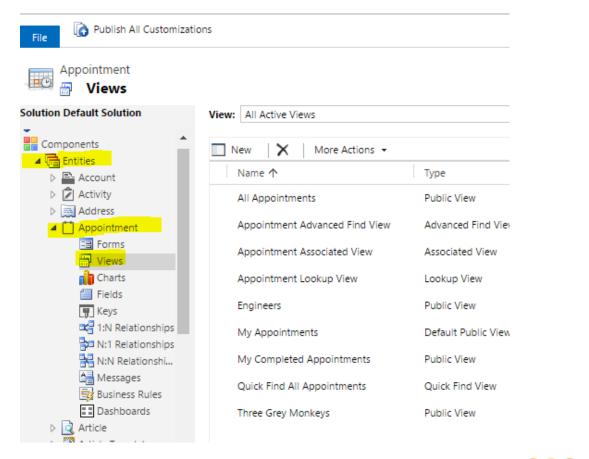
Create a new View

If a new filter is required, then a system customiser will need to create a new view in CRM. This can be achieved by following the instructions below.
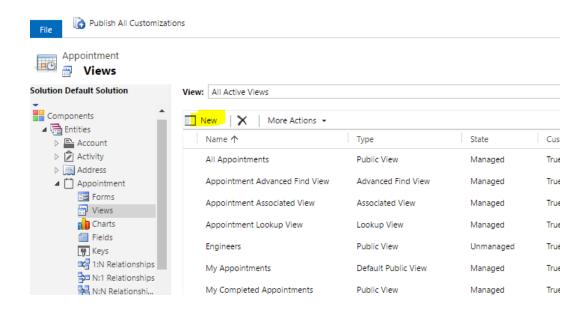
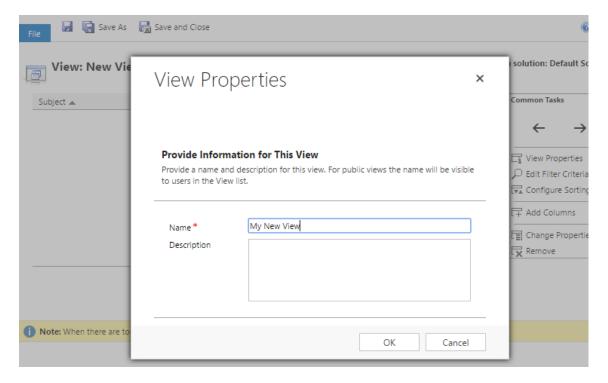1. Navigate to Settings > Customizations > Customize the System

2. In the component tree, navigate to Entities > Appointment > Views

3. Select the new button

4. Provide a name

5. Ensure the view has the following columns

1. Subject
2. Start Time
3. End Time
4. All Day Event

6. Edit the Filter Criteria, save the view and then publish it

- Once published, the view will be available for use in TGM Monkey Calendar