

# Monkey Calendar User Guide

Date: 14<sup>th</sup> December 2016

Version No: 1.0.0.0

Status: Beta



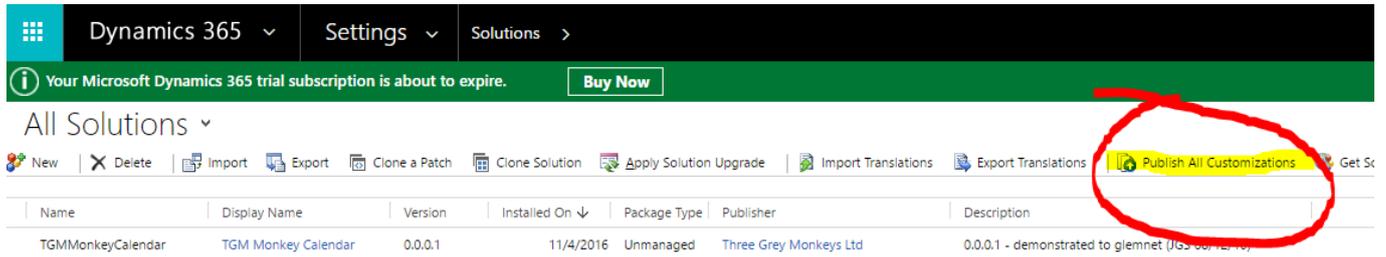
Three Grey Monkeys

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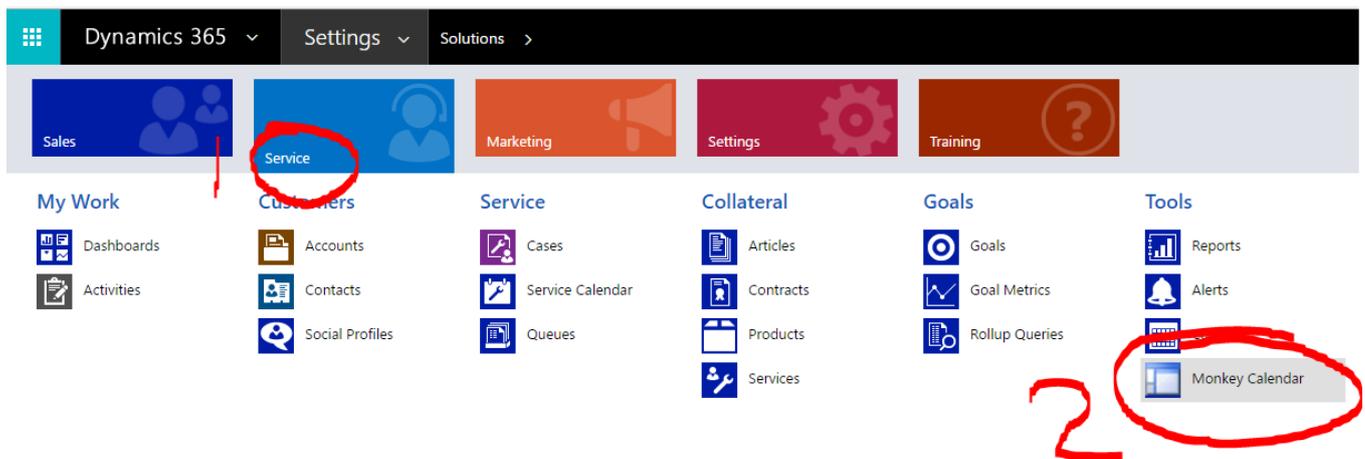
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## Setup

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

The screenshot shows the Dynamics 365 interface for the 'Monkey Calendar' application. The top navigation bar includes 'Dynamics 365', 'Service', and 'Monkey Calendar'. Below this is a secondary bar with 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA' options. The main calendar area is titled 'January 2017' and includes navigation controls for 'today', previous/next month, and view toggles for 'month', 'week', and 'day'. The calendar grid shows appointments for the following dates:

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3 Meet with Client	4 User story workshop	5	6	7	8
9	10	11	12	13	14	15
16	17	18 Tech Conference London	19	20	21	22
23	24	25	26	27 9a Client meeting	28	29
30	31	1	2	3	4	5

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

NEW ACTIVITY ▾ + NEW RECORD ▾ IMPORT DATA

All Appointments ▾ today < > 23rd – 29th Jan 2017 month week day

	Mon 23/1	Tue 24/1	Wed 25/1	Thu 26/1	Fri 27/1	Sat 28/1	Sun 29/1
all-day							
6am							
7am							
8am							
9am		9:00 - 12:30 Assessment			9:00 - 10:00 Client meeting		
10am							
11am							
12pm							
1pm				1:00 - 2:00 Business Strategy Meeting			
2pm							
3pm							
4pm							
5pm							

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

The screenshot displays the Dynamics 365 Monkey Calendar interface. At the top, there is a navigation bar with 'Dynamics 365', 'Service', and 'Monkey Calendar'. Below this is a toolbar with options like 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. The main calendar area shows a dropdown for 'All Appointments', a 'today' button, and navigation arrows. The date '14th December 2016' is prominently displayed, along with view toggles for 'month', 'week', and 'day'. The calendar grid for 'Wednesday' shows an 'all-day' slot at the top. Below it, time slots are listed from 6am to 5pm. Three appointments are visible: a brown bar for 'TGM Visit' from 8:00 to 9:00, a blue bar for 'Support workshop' from 9:00 to 11:00, and a dark blue bar for 'Lunch with client' from 12:00 to 1:00.

## Filtering Appointments

### Select a View

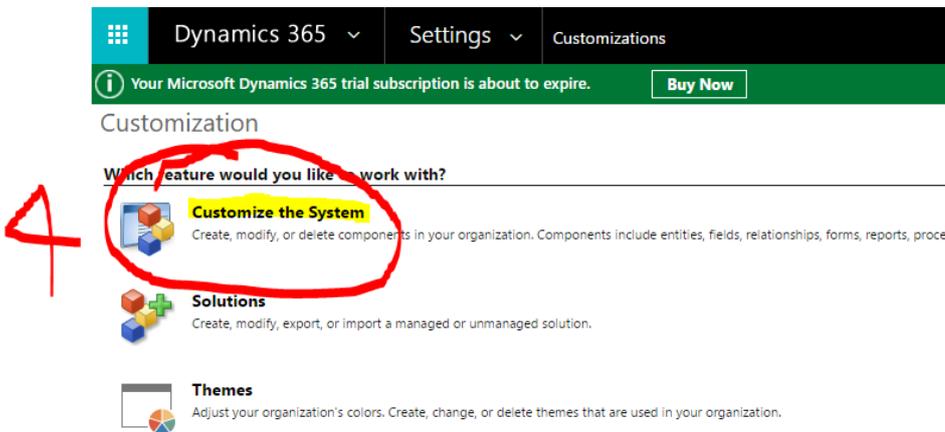
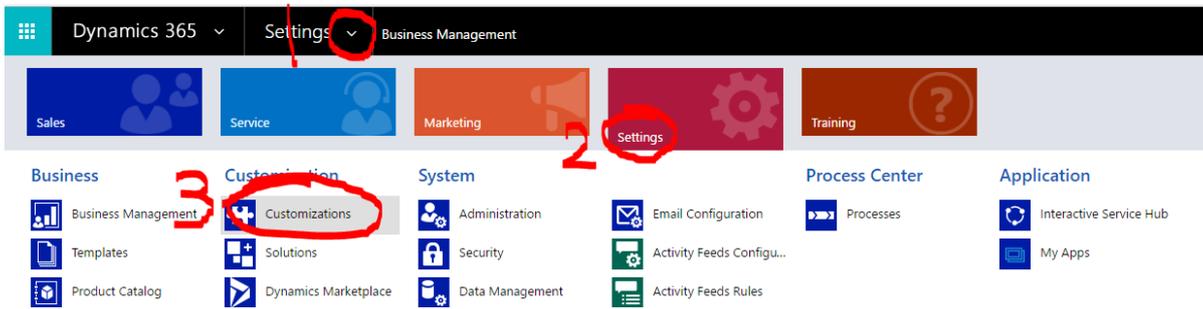
TGM Monkey Calendar filters appointments using Dynamics CRM views, which are listed in the picklist shown below. To choose a different filter, simply choose a view from the picklist. This will instantly update the calendar.

The screenshot shows the Dynamics 365 interface for the 'Monkey Calendar'. At the top, there are navigation tabs for 'Dynamics 365', 'Service', and 'Monkey Calendar'. Below this is a green banner with a message: 'Your Microsoft Dynamics 365 trial subscription is about to expire. Buy Now'. Underneath the banner are three buttons: 'NEW ACTIVITY', '+ NEW RECORD', and 'IMPORT DATA'. The main area features a view picklist on the left, which is circled in red. The picklist contains the following options: 'All Appointments', 'All Appointments', 'Engineers', 'My Appointments', 'My Completed Appointments', and 'Three Grey Monkeys'. To the right of the picklist is a 'today' button and navigation arrows. The calendar grid below shows dates from 28 to 31. Appointments are displayed as colored blocks: a yellow block for '12a TGM Visit' on Thursday 8th, a blue block for '12a Multi day test' spanning from Tuesday 12th to Saturday 17th, a brown block for '12a TGM Follow Up' on Saturday 17th, a blue block for '12a Test Engineers' on Tuesday 19th, and a blue block for '12a Fix the telephone' on Thursday 22nd.

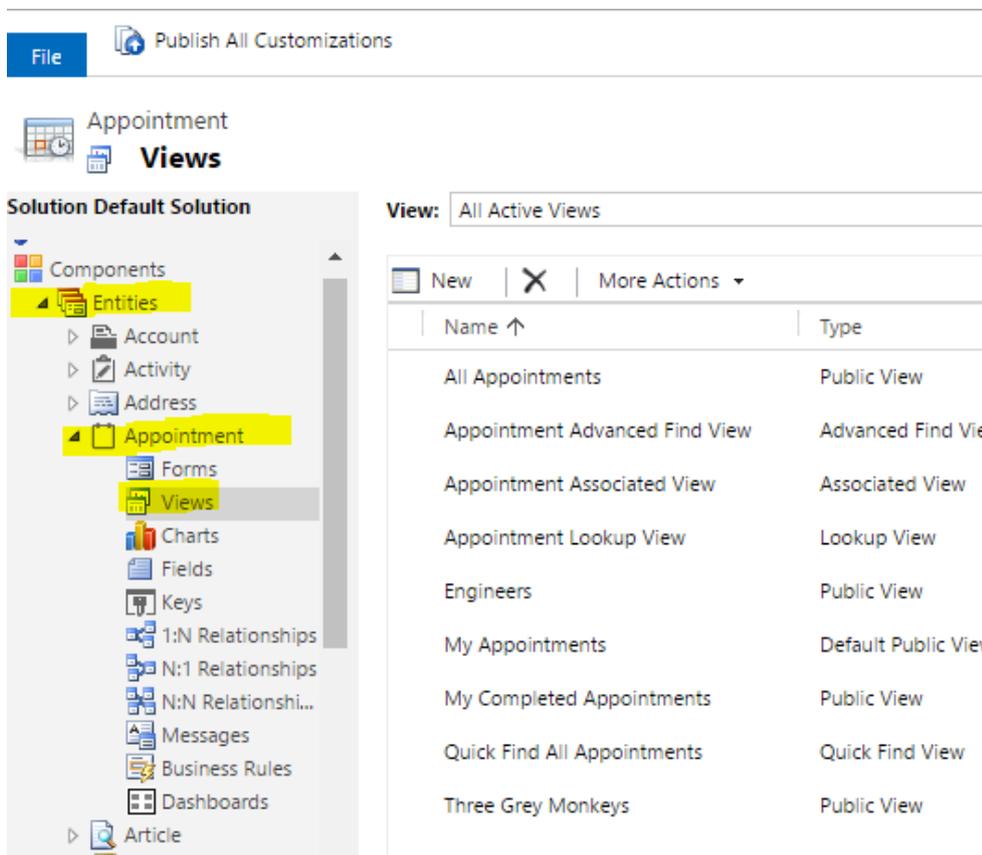
### Create a new View

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.

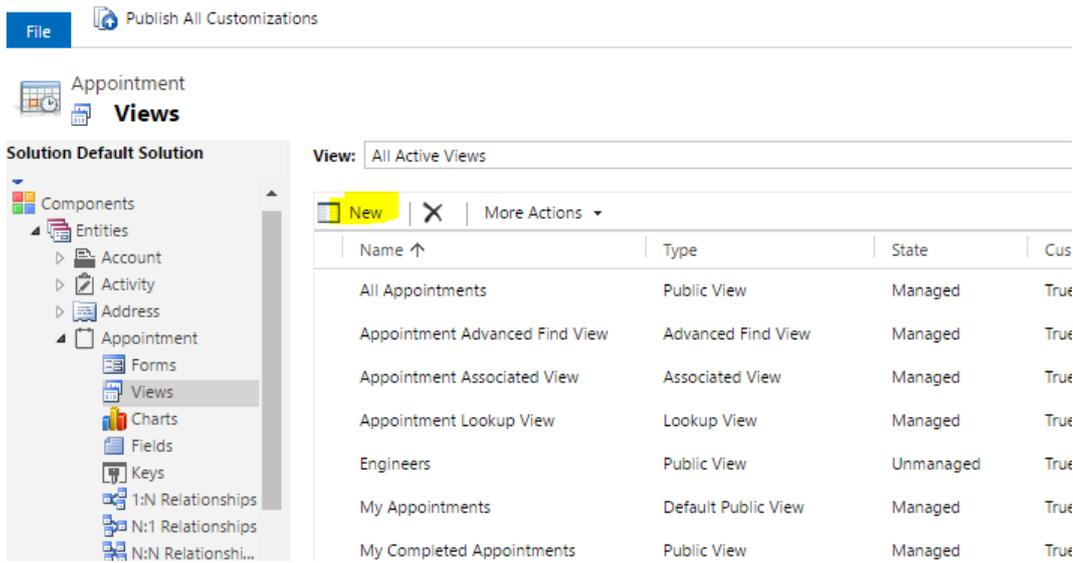
1. Navigate to Settings > Customizations > Customize the System



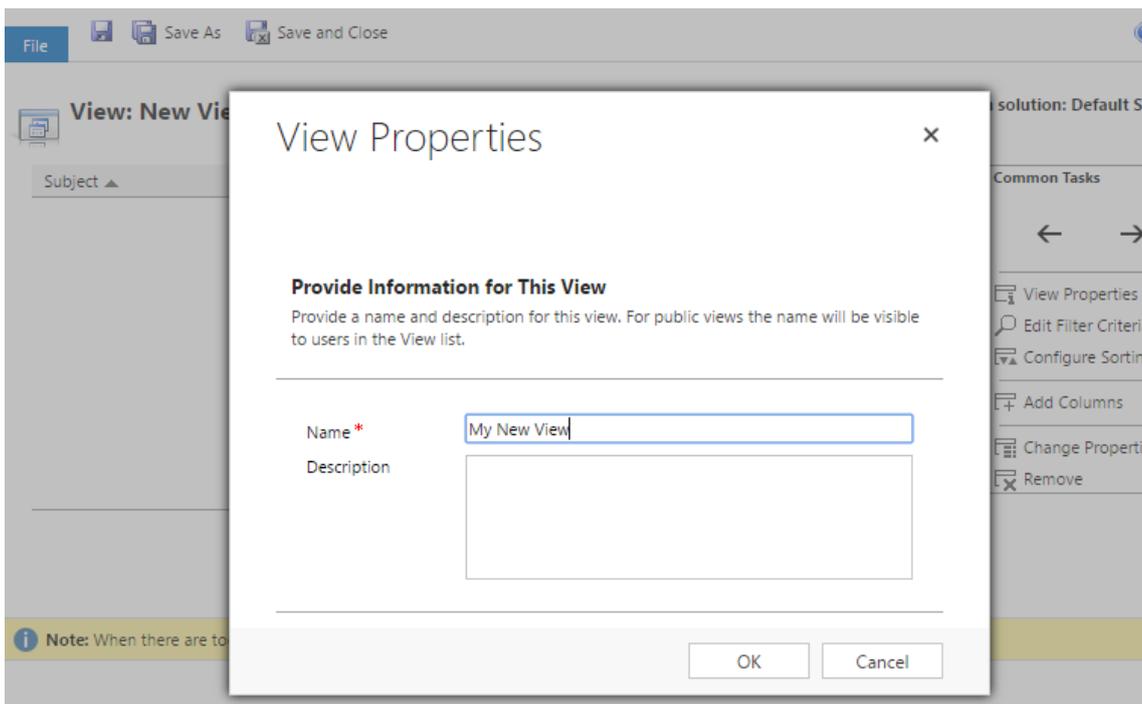
2. In the component tree, navigate to Entities > Appointment > Views



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