



How To Change Booking Status Colors for Dynamics 365 Schedule Board

By Kevin Razavi, AX/CRM Consultant, Arbelo Technologies

One common question when doing any Dynamics implementation is around how to change colors. Obviously, Dynamics offers Theming which allows an organization to ensure the system reflects a brand consistent theme. However, there are some additional color controlling features in Dynamics 365.

Booking Status:

The booking template's primary color is driven by the booking status, which changes over the life of the booking. In this case, the booking status is driving the color of the booking to blue. This color is driven by a setting on the Booking Status entity. In opening the Booking Status, a user can set the color through the Status Color field. All Booking Statuses are simply records and should be created in accordance with what makes sense for a particular implementation.

1) Navigate to Resource Scheduling> Settings> Book Statuses

The screenshot shows the Dynamics 365 navigation pane. The top bar includes 'Dynamics 365', 'Sales', and 'Dashboards'. The 'Resource Scheduling' link is highlighted with a red box. Below it, the 'Settings' section is expanded, and the 'Booking Statuses' link is also highlighted with a red box. A red arrow points from the 'Resource Scheduling' link to the 'Booking Statuses' link.

2) Activate Book Statuses are listed

The screenshot shows the 'Active Booking Statuses' list in Dynamics 365. The breadcrumb navigation at the top reads 'Dynamics 365 > Resource Sche... > Booking Statuses >'. Below the navigation bar, there are several action buttons: '+ NEW', 'DELETE', 'EMAIL A LINK', 'FLOW', 'RUN REPORT', 'EXCEL TEMPLATES', and 'EXPORT TO EXCEL'. The main content area shows a table with the following data:

| <input type="checkbox"/> | Name ↑ | Description | Created On |
|--------------------------|-------------|-------------|------------------|
| | Canceled | | 7/22/2018 4:0... |
| | Committed | | 7/22/2018 4:0... |
| | Completed | | 7/22/2018 4:0... |
| | In Progress | | 7/22/2018 4:0... |
| | On Break | | 7/22/2018 4:0... |
| | Scheduled | | 7/22/2018 4:0... |
| | Traveling | | 7/22/2018 4:0... |

3) Select one of the statuses by clicking on the name. For example, Scheduled

The screenshot shows the Dynamics 365 interface for 'Booking Statuses'. The top navigation bar includes 'Dynamics 365', 'Resource Sche...', and 'Booking Statuses'. Below the navigation bar are several action buttons: '+ NEW', 'DELETE', 'EMAIL A LINK', 'FLOW', 'RUN REPORT', 'EXCEL TEMPLATES', and 'EXPORT TO EXCEL'. The main content area is titled 'Active Booking Statuses' and contains a table with the following data:

| <input type="checkbox"/> | Name ↑ | Description | Created On |
|--------------------------|------------------|-------------|------------------|
| | Canceled | | 7/22/2018 4:0... |
| | Committed | | 7/22/2018 4:0... |
| | Completed | | 7/22/2018 4:0... |
| | In Progress | | 7/22/2018 4:0... |
| | On Break | | 7/22/2018 4:0... |
| | Scheduled | | 7/22/2018 4:0... |
| | Traveling | | 7/22/2018 4:0... |

4) Now the Booking Statuses Information Form should have opened

The screenshot shows the Dynamics 365 'BOOKING STATUS : INFORMATION' form. The top navigation bar includes '365', 'Resource Sche...', 'Booking Statuses', and 'Scheduled'. Below the navigation bar are several action buttons: 'TIVATE', 'DELETE', 'ASSIGN', 'SHARE', 'EMAIL A LINK', 'RUN WORKFLOW', 'START DIALOG', 'FLOW', and '...'. The main content area is titled 'BOOKING STATUS : INFORMATION' and contains the following information:

BOOKING STATUS : INFORMATION

Scheduled

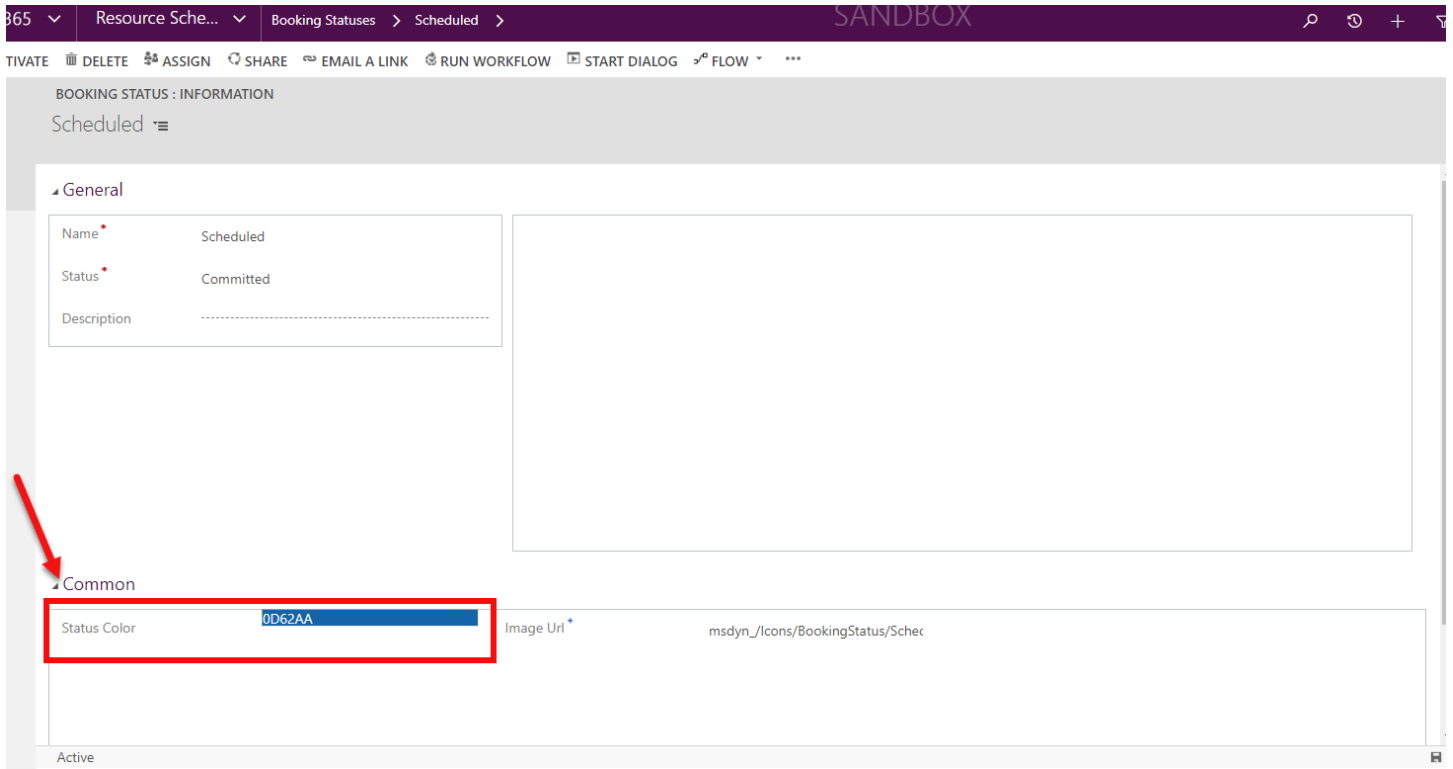
General

Name: Scheduled
Status: Committed
Description:

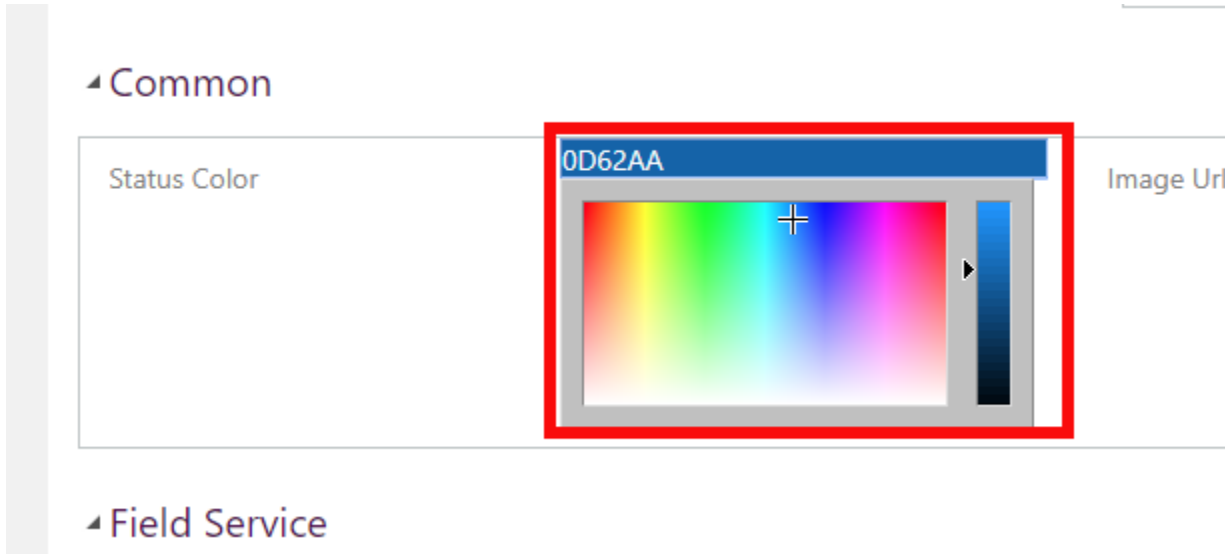
Common

Status Color: 0D62AA
Image Uri: msdyn_/Icons/BookingStatus/Schec

5) Under Common, locate field: Status Color



6) Click on the Status Color field to open color mixer



7) Select a color OR if you know the HTML Color Code, copy & paste code in field. A great website to generate HTML

Color Code is <https://htmlcolorcodes.com/>

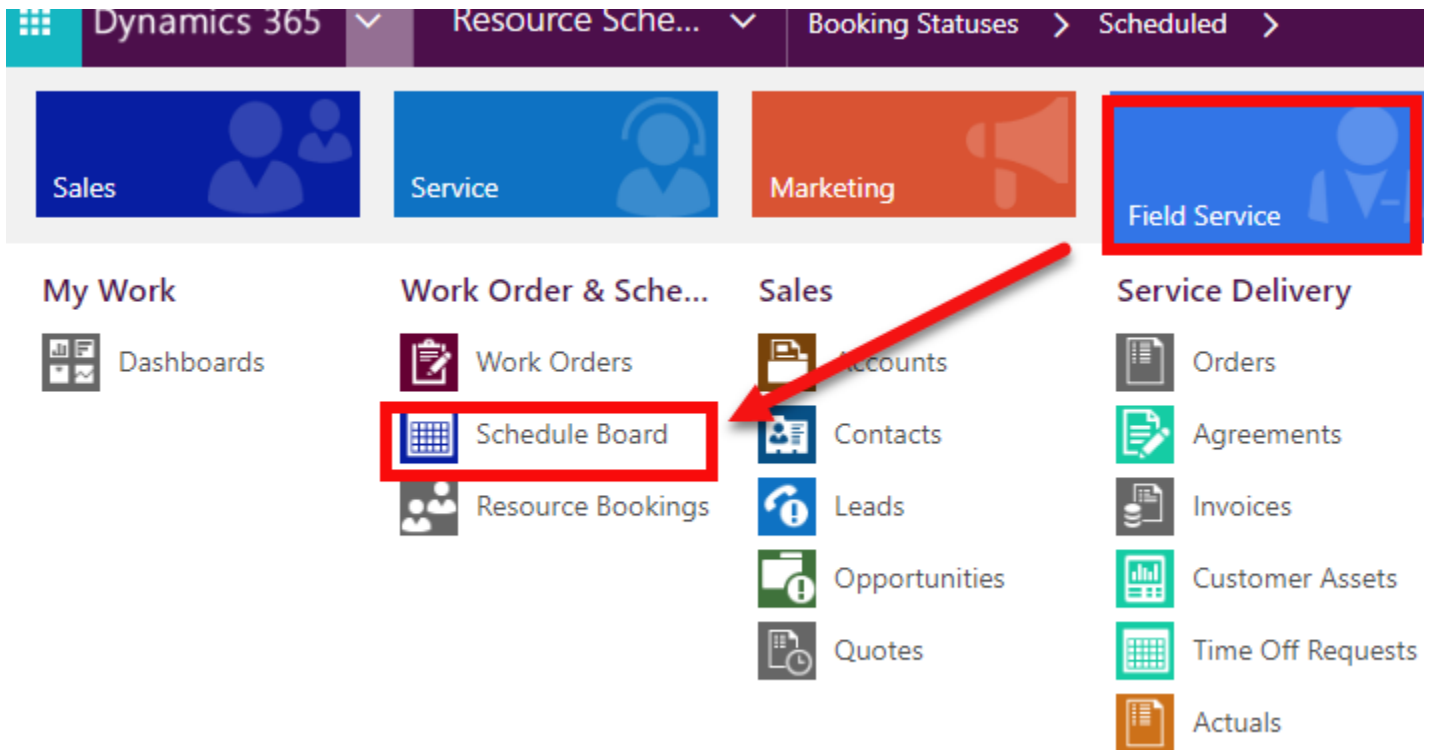
The image shows two overlapping windows. On the left is a color selection tool with a table of colors. On the right is a configuration interface for 'BOOKING STATUS : INFORMATION'.

| Color | NAME | HEX | RGB | HSL |
|-------|--------|---------|------------------|---------------------|
| | RED | #FF0000 | RGB(255, 0, 0) | HSL(0, 100%, 50%) |
| | MAROON | #800000 | RGB(128, 0, 0) | HSL(0, 100%, 12.5%) |
| | YELLOW | #FFFF00 | RGB(255, 255, 0) | HSL(60, 100%, 50%) |
| | OLIVE | #808000 | RGB(128, 128, 0) | HSL(60, 100%, 25%) |
| | LIME | #00FF00 | RGB(0, 255, 0) | HSL(120, 100%, 50%) |
| | GREEN | #008000 | RGB(0, 128, 0) | HSL(120, 100%, 25%) |
| | AQUA | #00FFFF | RGB(0, 255, 255) | HSL(180, 100%, 50%) |
| | TEAL | #008080 | RGB(0, 128, 128) | HSL(180, 100%, 25%) |
| | BLUE | #0000FF | RGB(0, 0, 255) | HSL(240, 100%, 50%) |
| | NAVY | #000080 | RGB(0, 0, 128) | HSL(240, 100%, 25%) |

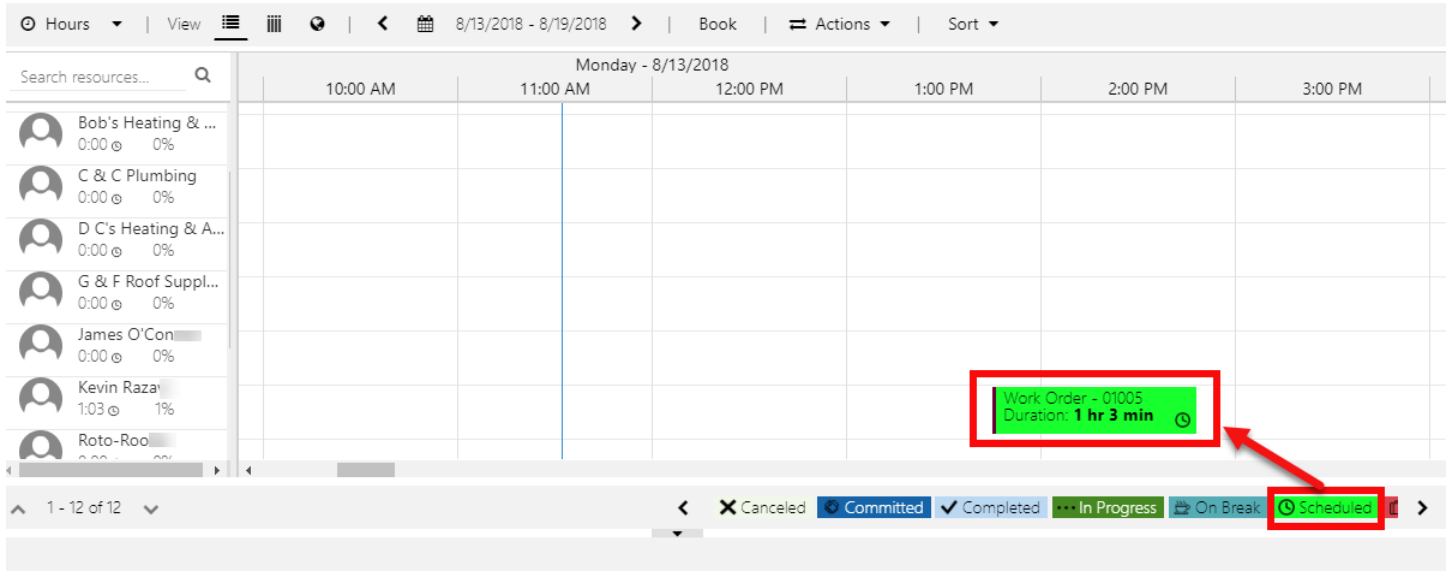
The right window shows a configuration panel for 'BOOKING STATUS : INFORMATION' with a 'Scheduled' status. Under the 'Common' section, the 'Status Color' field is set to '#00FF00', which is highlighted with a red box. A red arrow points from the 'LIME' color entry in the table to this field. The 'Field Service' section is also visible below.

8) Click Save

9) Navigate to Schedule Board (Field Service> Schedule Board)



10) Locate a Work Order that contains the Booking Status you modified. In this example, we modified the status Scheduled. Note: Booking Status guide on Schedule Board updates as well.



11) Follow steps 1-8 to modify another Booking Status Color.