ActivityTools for Microsoft CRM 2015/2016 and Dynamics 365

v.2.4, June 2017

ActivityTools

(How to work with ActivityTools for Microsoft CRM 2015/2016 and Dynamics 365)

Content

Preamble

This documentation is intended to guide you through the installation and proper usage of ActivityTools for Microsoft Dynamics CRM.

This guide applies to version 2015.207 or higher.

Please read this document carefully and follow the steps as described to achieve the described results.

Target Audience

This guide is intended for system administrators who are familiar with the following administrative tasks:

- Maintaining and configuring SQL Server databases
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft CRM Server

Supported Web Browsers and versions

Supported Web Browsers and Versions:

- Internet Explorer 9 and higher
- Firefox
- Chrome
- Edge

One of the following editions of Microsoft Dynamics CRM must be available:

- Microsoft Dynamics CRM Server 2015/2016 or Dynamics 365
- Microsoft Dynamics CRM Online

If you use ActivityTools 2015.200 or a higher version, you can upgrade from Microsoft Dynamics CRM 2015 to 2016 without extra work.

If you use an older version, please find a short step-by-step instruction about the upgrade of our addons to the latest version of Microsoft Dynamics CRM 2016 here.

(Also, valid for Dynamics 365)

Any one of the following operating systems is required:

- Windows 10
- Windows 8.1 (64-bit and 32-bit versions)
- Windows 8 (64-bit and 32-bit versions)
- Windows 7 (64-bit and 32-bit versions)
- Windows Vista SP2 (6-bit and 32-bit versions)
- Windows Server 2012, Windows Server 2008 R2, or Windows Server 2008 when running as a Remote Desktop Services application.

Purpose of ActivityTools?

AcitivityTools facilitates – among other things – the handling of activities and provides you with some Outlook Look & Feel in Dynamics 365.

With its email features, ActivityTools guarantees super user-friendly with Microsoft Dynamics 365! Defining signatures for a single Dynamics 365 user or a default email signature for all users is done in no time! ActivityTools supports HTML to define signatures in order to use links, pictures and front types/colors!

Besides its email features, ActivityTools is delivered with search and filter options, direct access to attachments, load on demand (which guarantees high performance) and a form designer, that allows users to fully customize the layout of ActivityTools.

1 How to install ActivityTools for Microsoft Dynamics CRM 2015/2016 and Dynamics 365

ActivityTools is very easy to install and to integrate into Microsoft Dynamics 365. The program can be installed and integrated in two different ways:

via .exe installer
(for details please have a look at CHAPTER HOW TO INSTALL ACTIVITYTOOLS VIA .EXE INSTALLER ON PAGE 7)

via solution import
(for details have a look at CHAPTER HOW TO INSTALL ACTIVITYTOOLS VIA SOLUTION IMPORT ON PAGE 13)

Before installing our product, you will have to download and unzip the ActivityTools folder. The following screenshot shows the downloaded and unzipped product. No matter which way of installing the program you choose, this window is the starting point:

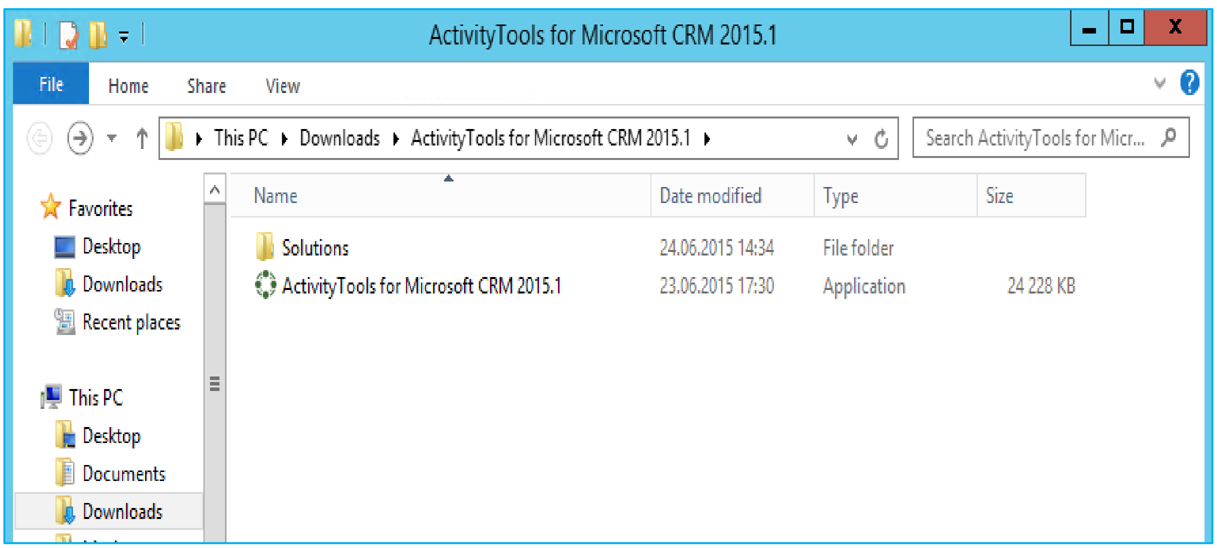


Figure 1: ActivityTools – Download .zip-file

2 How to install ActivityTools via .exe installer

If you have decided to install ActivityTools via .exe installer, you should start the installation with a double click on the ActivityTools.exe.

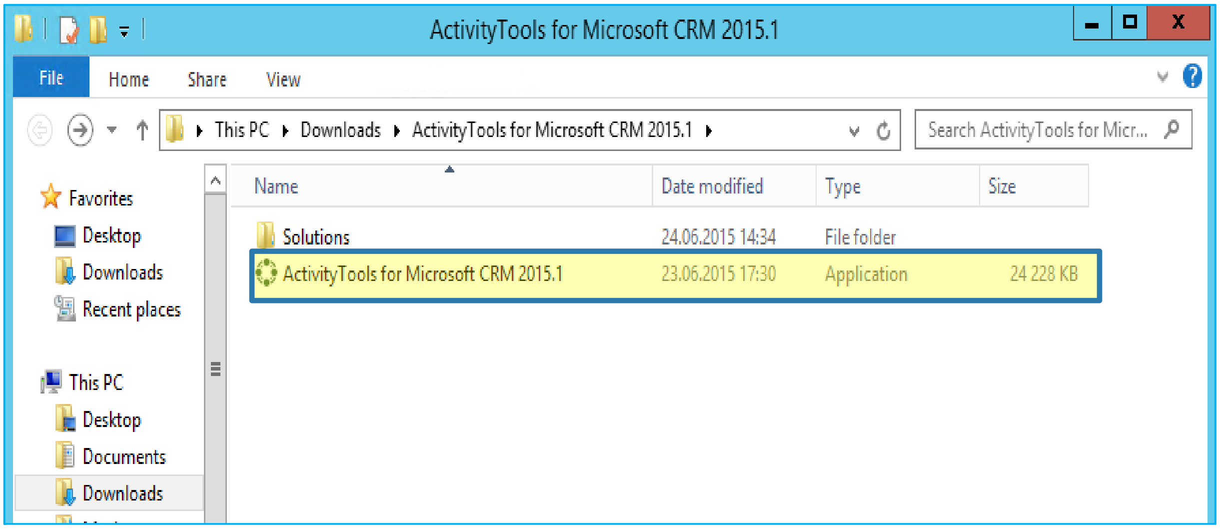


Figure 2: AcitivtyTools .exe installer

Click on the ***[Next]***-button in order to the installation.

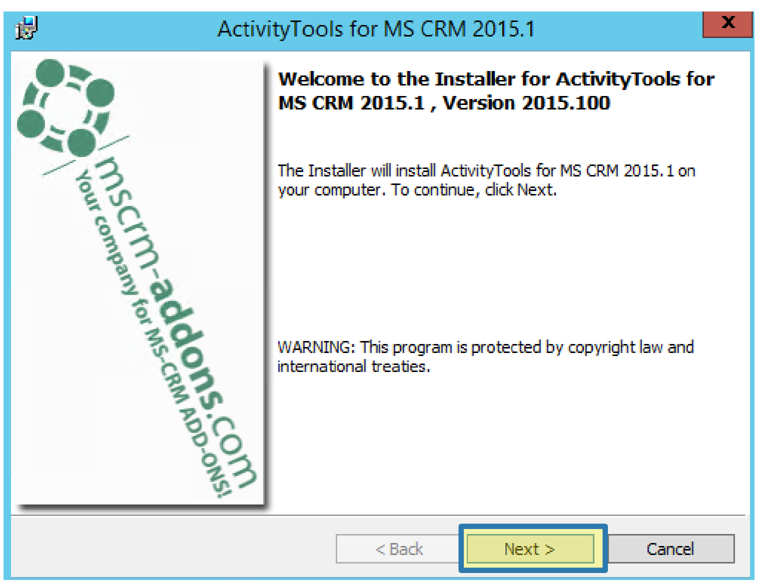


Figure 3: Installation dialog

2.1 EULA (End User License Agreement)

Read the license agreement carefully and accept its terms if you agree to them. In case you do not accept the license agreement, you cannot continue with the installation. You may also print the agreement if you want to.

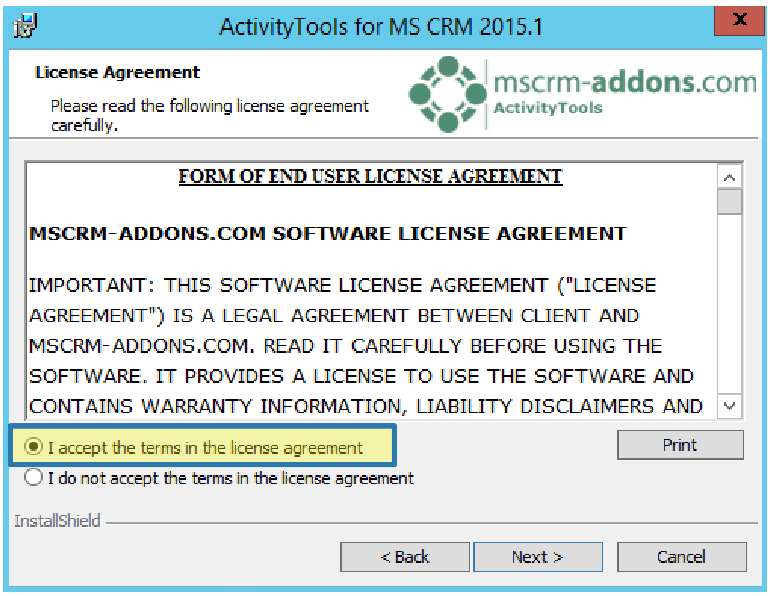


Figure 4: EULA – End User License Agreement

2.1 Installation

After accepting the EULA click on the ***[Next]***-button to continue with the installation. In case you want to change the settings, simply click on the ***[Change]***-button.

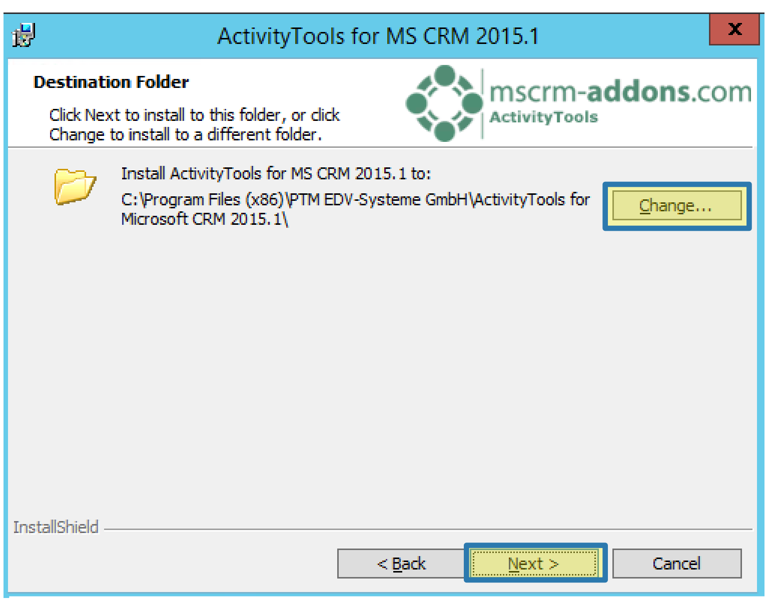


Figure 5: Installation – Destination folder

Click on the ***[Install]***-button to start the installation:

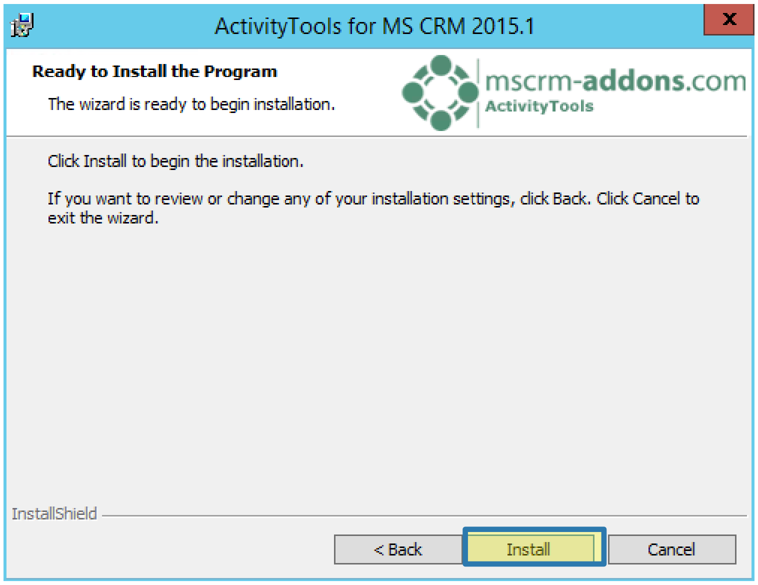


Figure 6: ActivityTools installation finished

2.2 Logon Information

ActivityTools requires a connection to Dynamics 365. To configure your Dynamics 365 Server, select an existing profile or create a new profile. Choose your preferred server path and add your login credentials by filling in the field's username, password and domain. Press the ***[Retrieve all Organizations]***-button and select your organization.

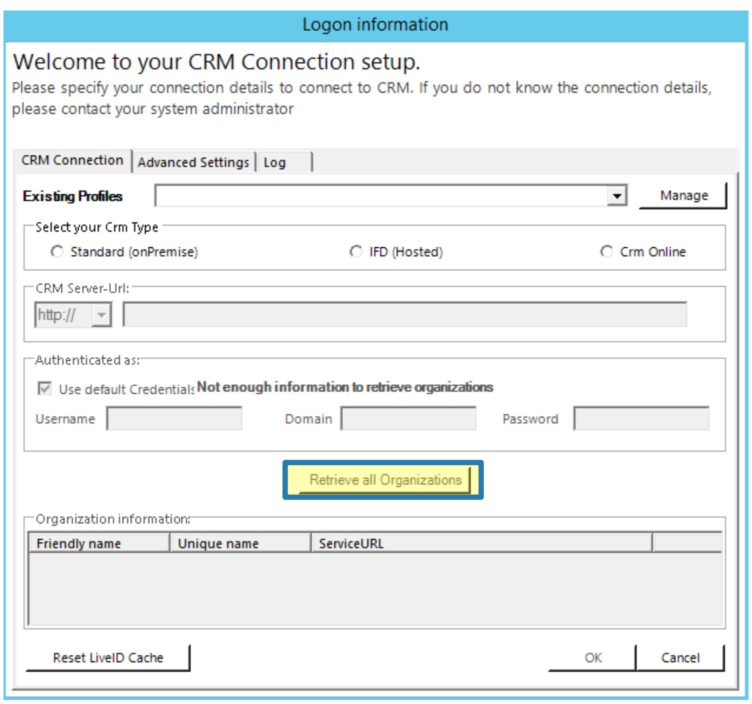


Figure 7: CRM Connection setup – Retrieve all Organizations

Now press the ***[OK]***-button. For further information on the CRM Connection dialog, please have a look at our Connection Dialog documentation in the download area of our website.

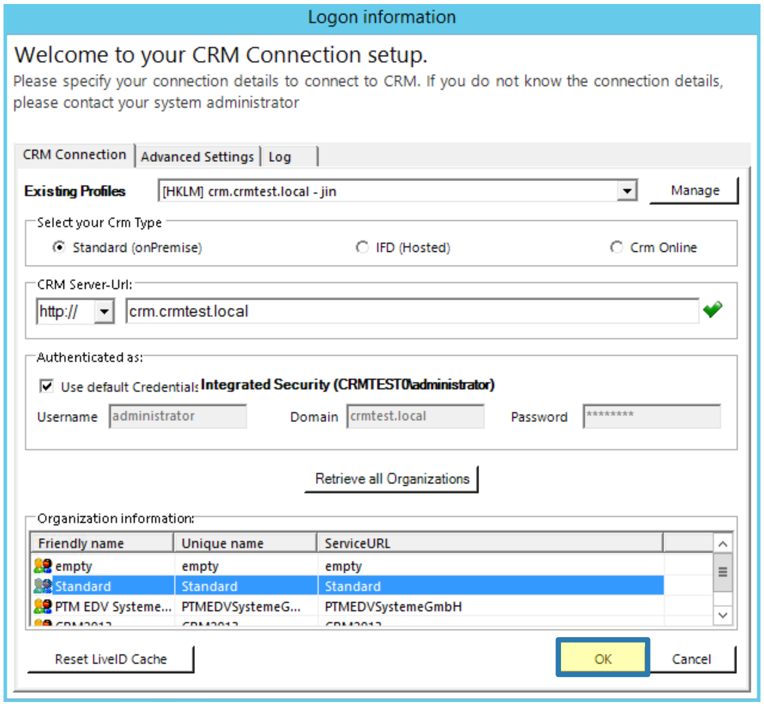


Figure 8: CRM Connection setup – select organization

Anyway, when you proceed, the following window appears on the screen:

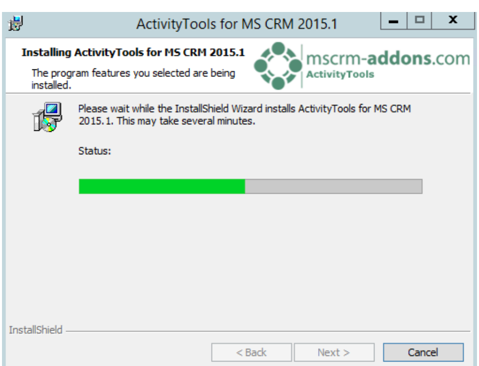


Figure 9: InstallShield Wizard

During the installation process, you will be asked if you want to install demo forms for the entities account and contact. If you want to have a quick look at the functionalities without further configuration needs, feel free to install the demo forms. To do so, click on the ***[Yes]***-button. To skip this step, click on the ***[No]***-button.

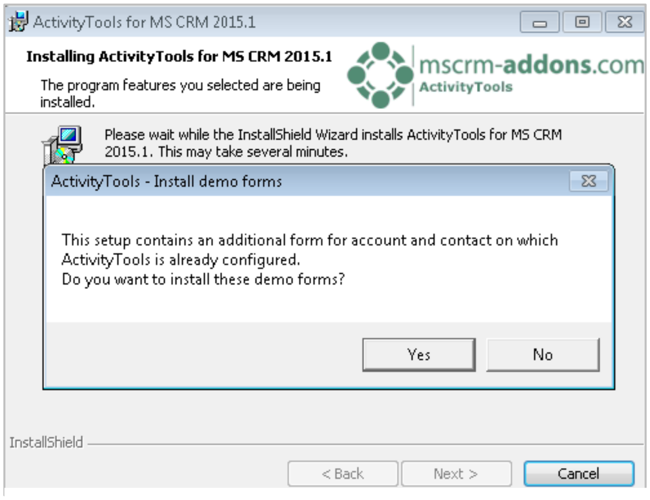


Figure 10: Demo forms dialog

For detailed information on Demo Forms, please take a look at chapter 3 How to install ActivityTools via solution import on page 13.

2.3 Security Roles

General security roles for all products

The following security role contains the basic requirements for using our products and for being able to perform the license check:

- MSCRM-Addons General Security Role

During the installation you will also be asked if you want to install the security roles for all users:

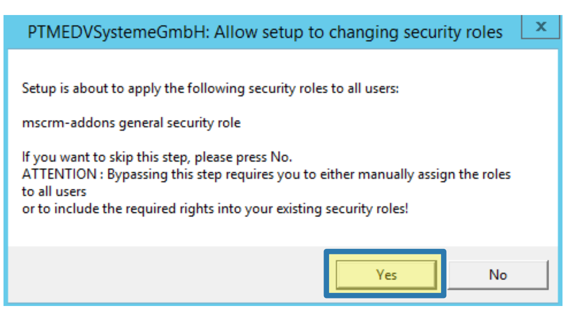


Figure 11: Install security roles for all users?

Click on the ***[Yes]***-button in order to continue. In case you click on the ***[No]***-button, you will have to assign the roles manually to all users.

2.4 Complete the installation

If the installation was successful, the following window appears. Click on the ***[Finish]***-button to complete the installation and to exit the installer.

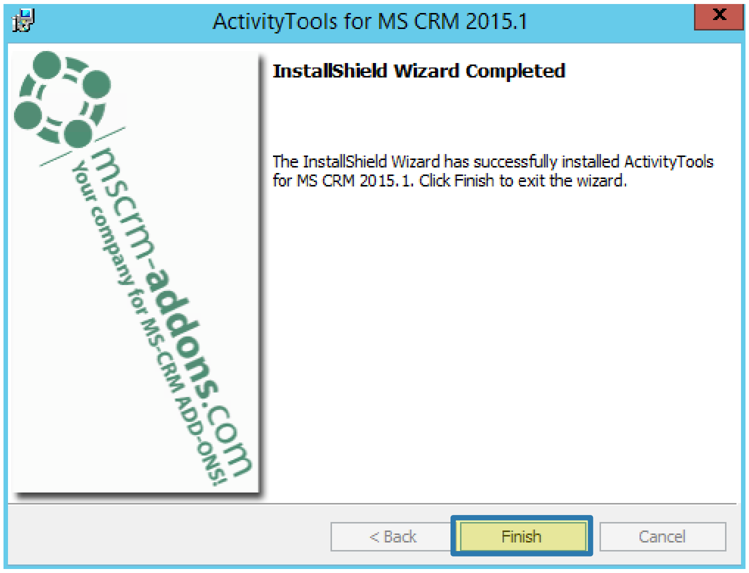


Figure 12: Complete the installation process

3 How to install ActivityTools via solution import

To install ActivityTools via solution import, open CRM and navigate to *Settings* and select *Solutions* there.

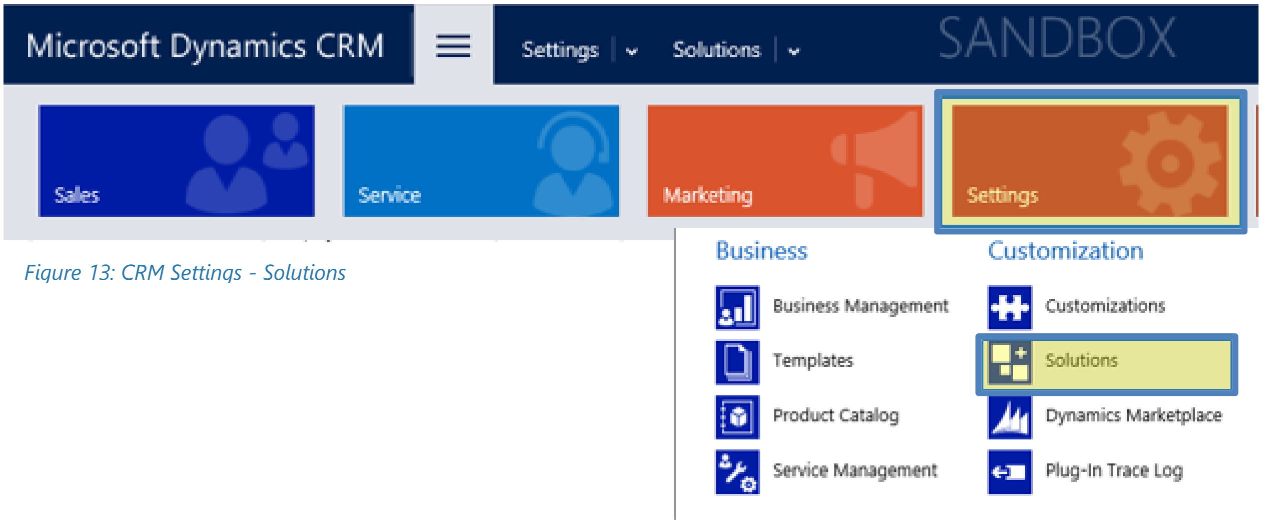


Figure 13: CRM Settings - Solutions

Click on the ***[Import solutions]*** – button in order to import ActivityTools.

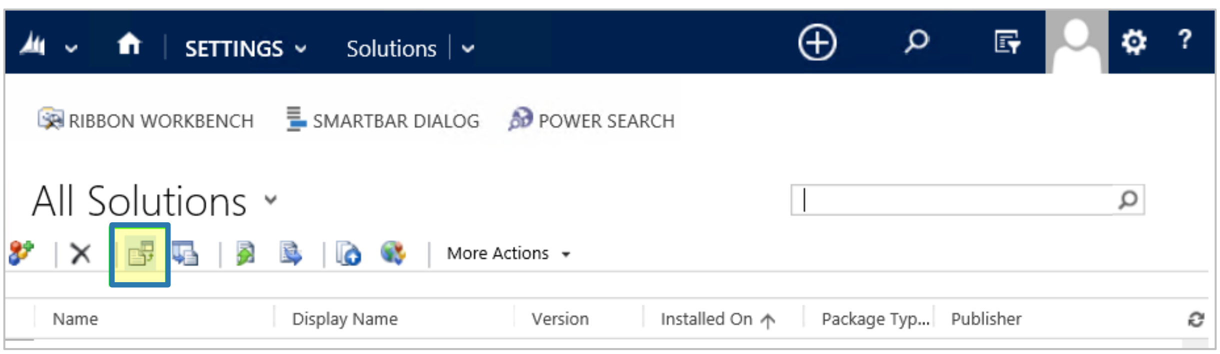


Figure 14: Import Solutions

The *Select Solution Package*-window opens:

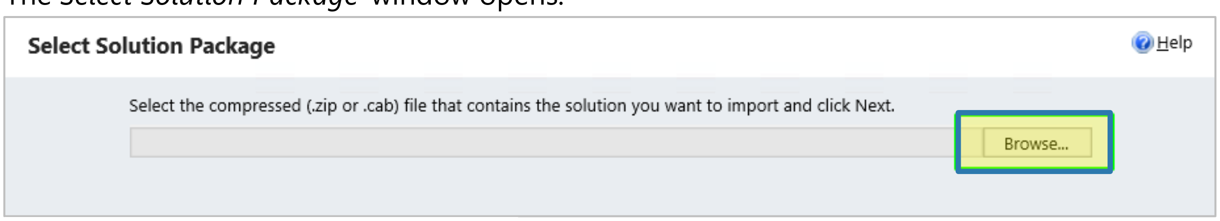


Figure 15: Select Solution Package window

Now click on the ***[Browse]***-button and upload the following files:

1. MSCRMADDONScomGeneral
2. ActivityToolsPluginCore

It is of upmost importance to upload the two mandatory files in the above order!

If you have not modified the file location in the beginning, you should find the files here:

Downloads\ActivityTools for Microsoft CRM 2015.1\Solutions

After a simple double-click on the first file ("MSCRMADDONScomGeneral")

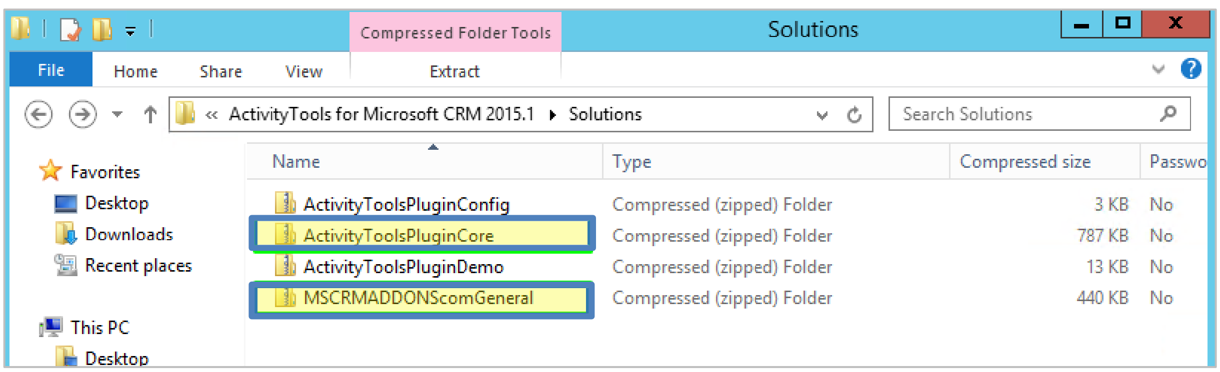


Figure 16: Select Solution Package window

... your screen will appear like this:

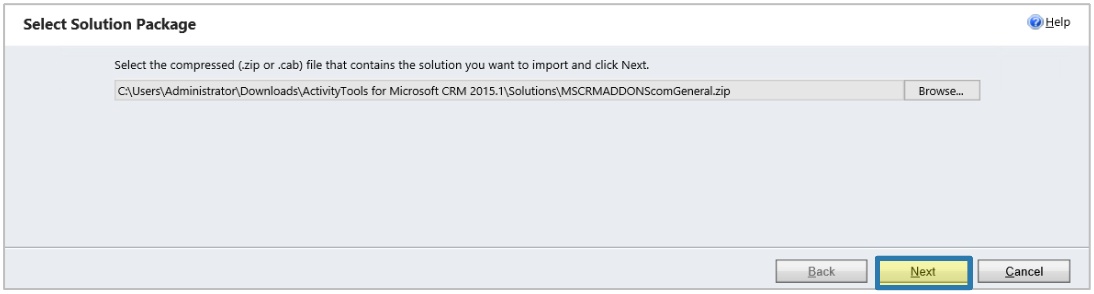


Figure 17: Select Solution Package

Now click on the ***[Next]***-button…

… and the following window appears on the screen:

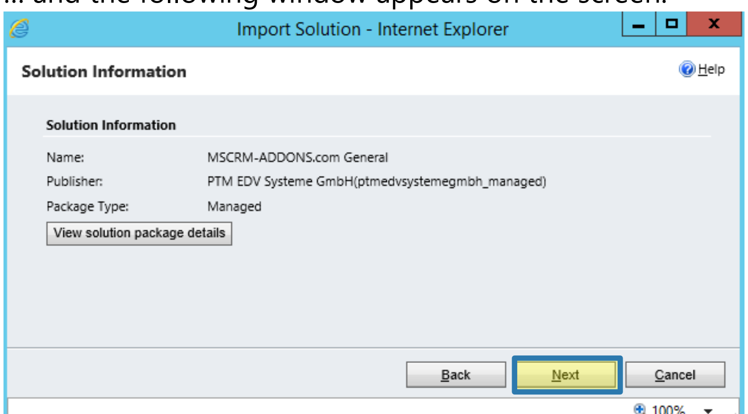


Figure 18: Import Solution window

If ActivityTools is already imported, the following window appears:

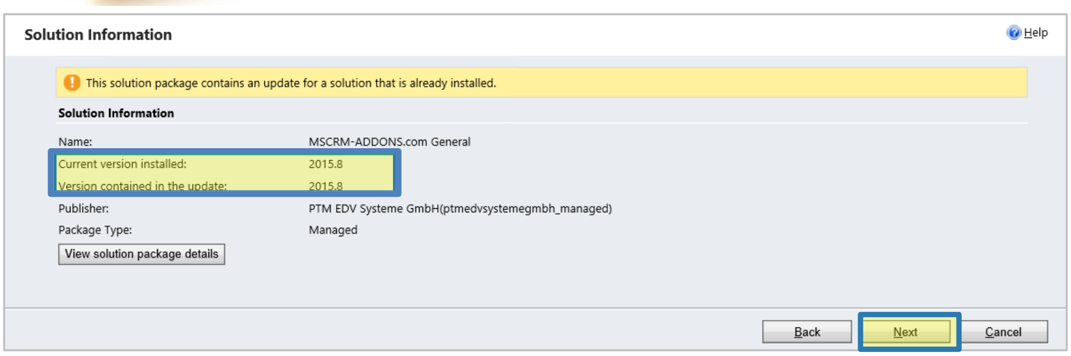


Figure 19: Import Solution window – installed solution

No matter which message appears, click on the ***[Next]***-button in order to proceed.

The following window opens. Please choose the second point: *Overwrite customizations* and click on the ***[Import]***-button.

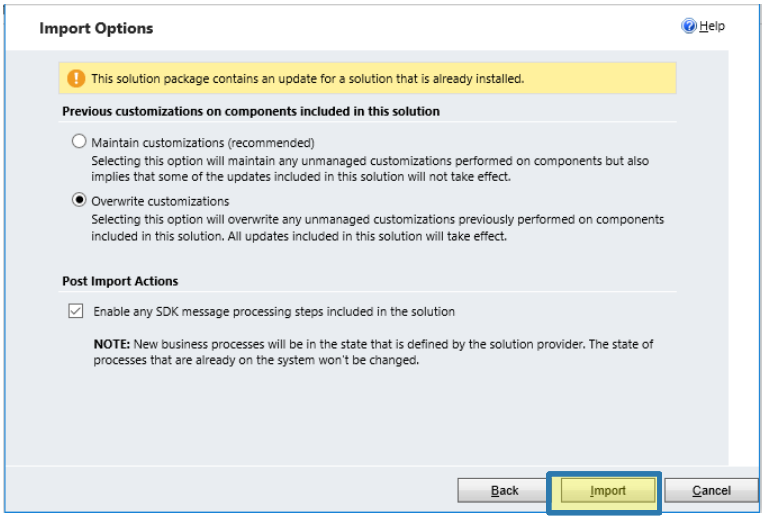


Figure 20: Import Solution package – overwrite customizations

The following window appears:

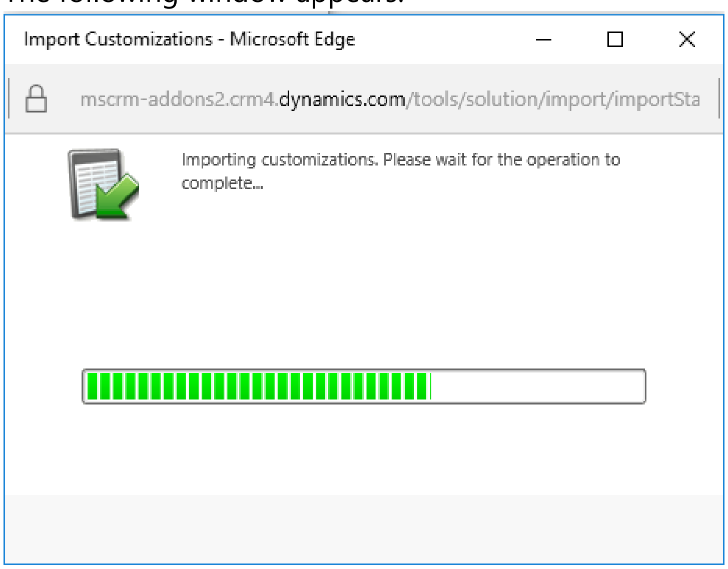


Figure 21: Import Customizations

The import might take up to a few minutes.

If everything went fine, the following window appears on your screen:

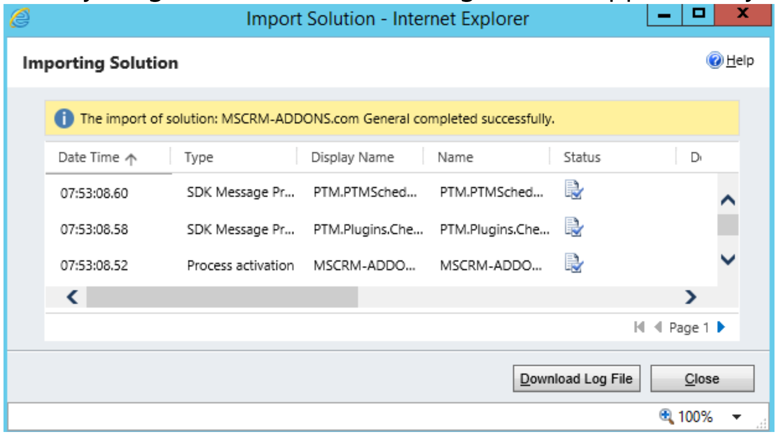


Figure 22: Import solutions successful.

This means that the import was successful. Please close this window and import the next file

ActivityToolsPluginCore by repeating all the steps.

Again, start with a click on the ***[Import solutions]***–button.

Depending on the way you are going to use ActivityTools, you may also want to import the following non-compulsory files:

ActivityToolsPluginConfig

Import this solution to use the email signature and its features.

ActivityToolsPluginDemo

Import this solution if you want to install an additional demo form for account and contact on which ActivityTools is already configured. These forms are only for demo purpose and should not be modified.

3.1 Additional information for Dynamics 365 versions only:

After importing the above solutions, you will have the base functionality of ActivityTools. If you also want to use the ***[New Activity]***- or the ***[Close]***-button, please import the *ActivityToolsPluginExtension*-solution as well.

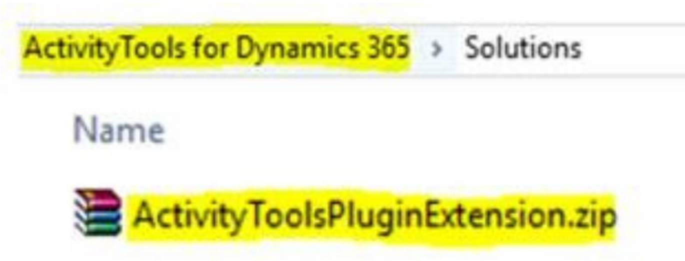


Figure 23: Import solutions successful.

3.2 Launch ActivityTools

In case you have decided to install the demo forms as well, you can now give it a try. To do so open a *Contact* record and click on the drop-down menu next to the contact in order to switch to the *ActivityTools Demo Contact* view:

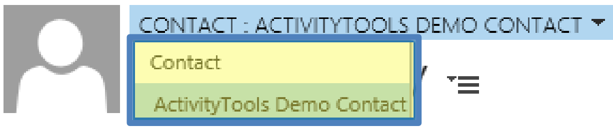


Figure 24: ActivityTools demo

Now your screen should look like this:

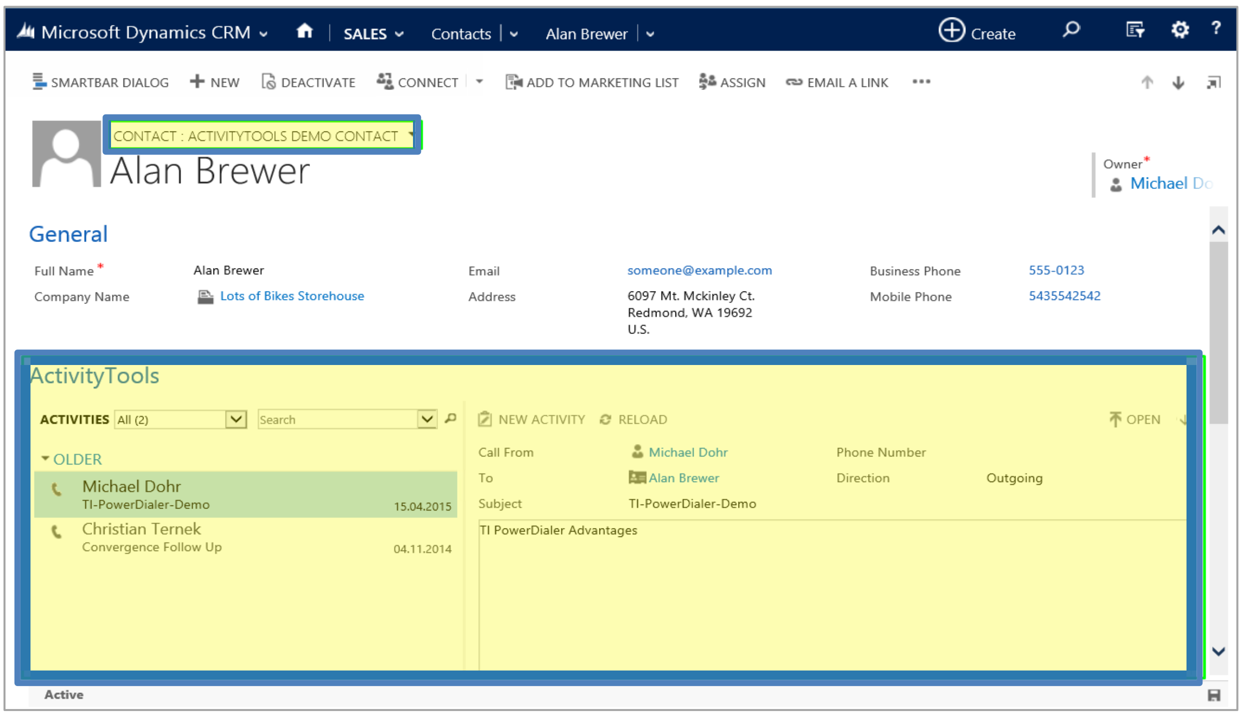


Figure 25: ActivityTools solution import result

That's it! You have successfully imported the ActivityTools solutions!

4 ActivityTools Organization Overview

ActivityTools offers two different ways to get an overview of the organization and the configuration.

While the Organization Overview and the Configuration Page are available for ActivityTools when installed via .exe installer, you depend on the Configuration Page only when you have installed ActivityTools via solution import.

Please find further information on how to get an overview when installing ActivityTools:

via .exe installer in chapter
4.1 ACTIVITYTOOLS ORGANIZATION OVERVIEW WHEN INSTALLING ACTIVITYTOOLS VIA .EXE INSTALLER ON PAGE 21.
5 CONFIGURATION PAGE ON PAGE 24

via solution import in chapter
5 CONFIGURATION PAGE ON PAGE 24

4.1 ActivityTools Organization Overview when installing ActivityTools via .exe installer

When working with the .exe installer, you first have to call up the CRM connection setup. To do so, enter *Configuration ActivityTools* in the search field of the start pane.

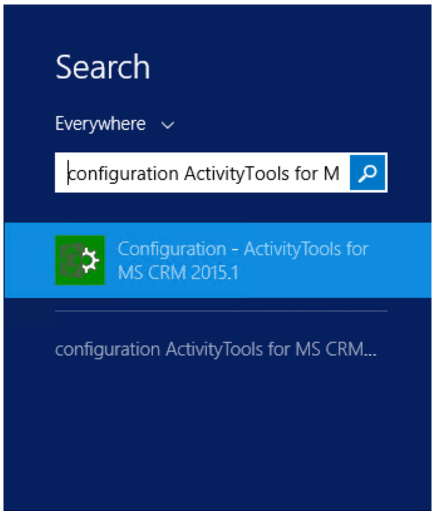


Figure 26: Search field -start pane

The CRM Connection setup dialog appears. Select the appropriate organization and click on the ***[Retrieve all Organizations]***-button in order to continue. Usually you will simply have to click on the ***[OK]***-button because the appropriate organization has already been selected by the system. Anyway, there is nothing wrong in double-checking the data. For further information on the CRM Connection dialog, have a look at our Connection Dialog Documentation on our website.

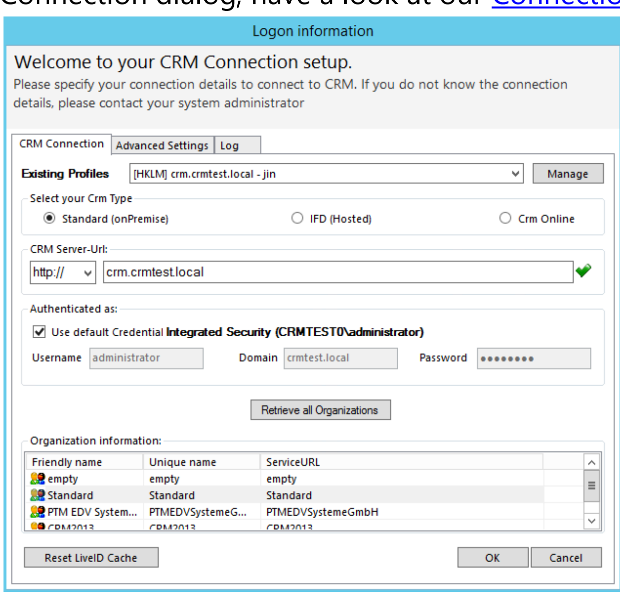


Figure 27: CRM Connection Dialog

The following organization overview appears:

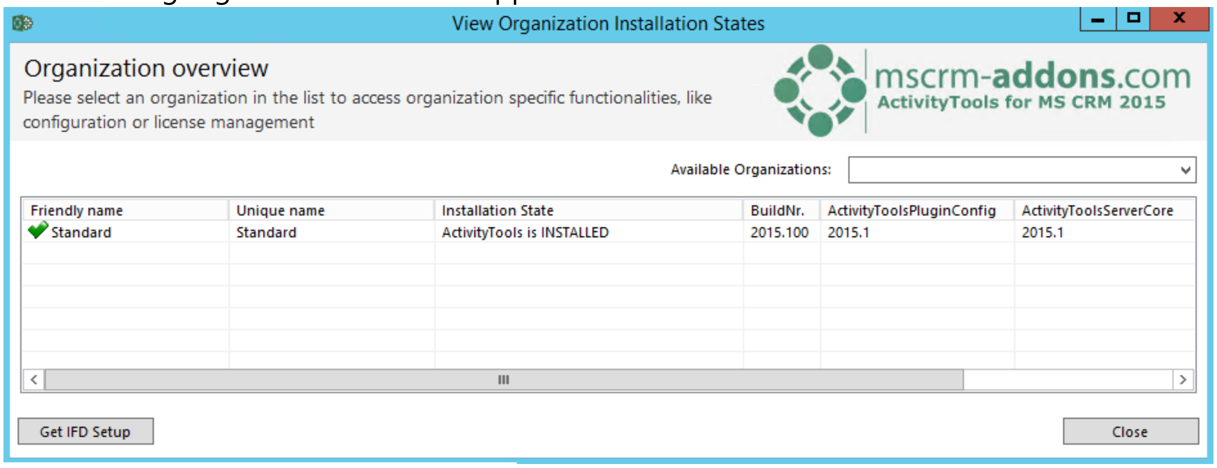


Figure 28: Organization overview

When you select your preferred organization in the list, specific function-buttons appear at the window bottom:

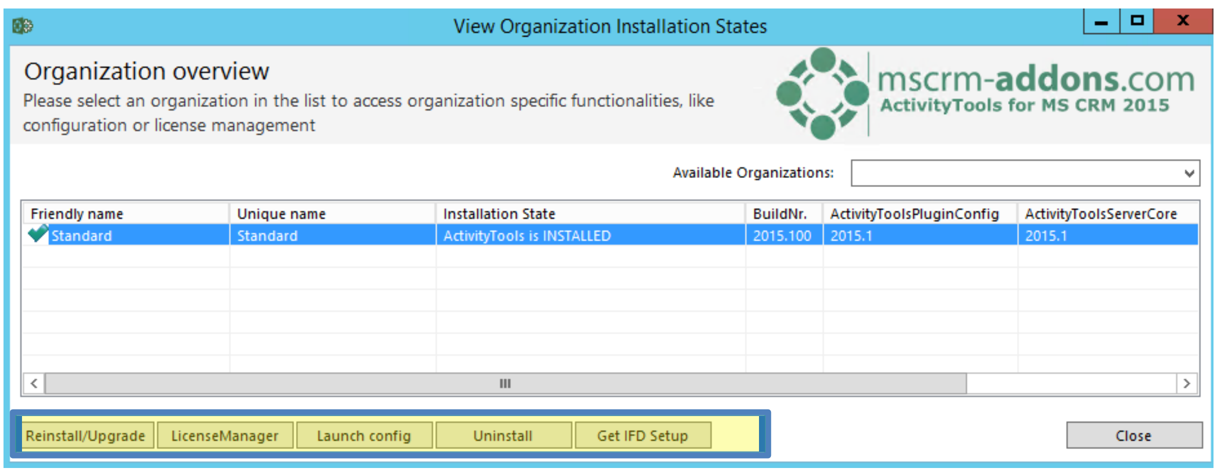


Figure 29: Organization overview – specific buttons

4.1.1 How to reinstall/upgrade

Select an organization in the Organization Overview and click on the ***[Reinstall/Upgrade]***-button to reinstall or upgrade ActivityTools for Microsoft CRM 2015/2016 and Dynamics 365.

4.1.2 How to use the LicenseManager

Select an organization in the and click on the ***[LicenseManager]***-button in order to open the LicenseManager. Another opportunity to open the LicenseManager is to search for *LicenseManager – ActivityTools for MS CRM 2015/2016* in the start pane and to hit *Enter* to start the program.

Anyway, after starting the *LicenseManager*, the following window appears:

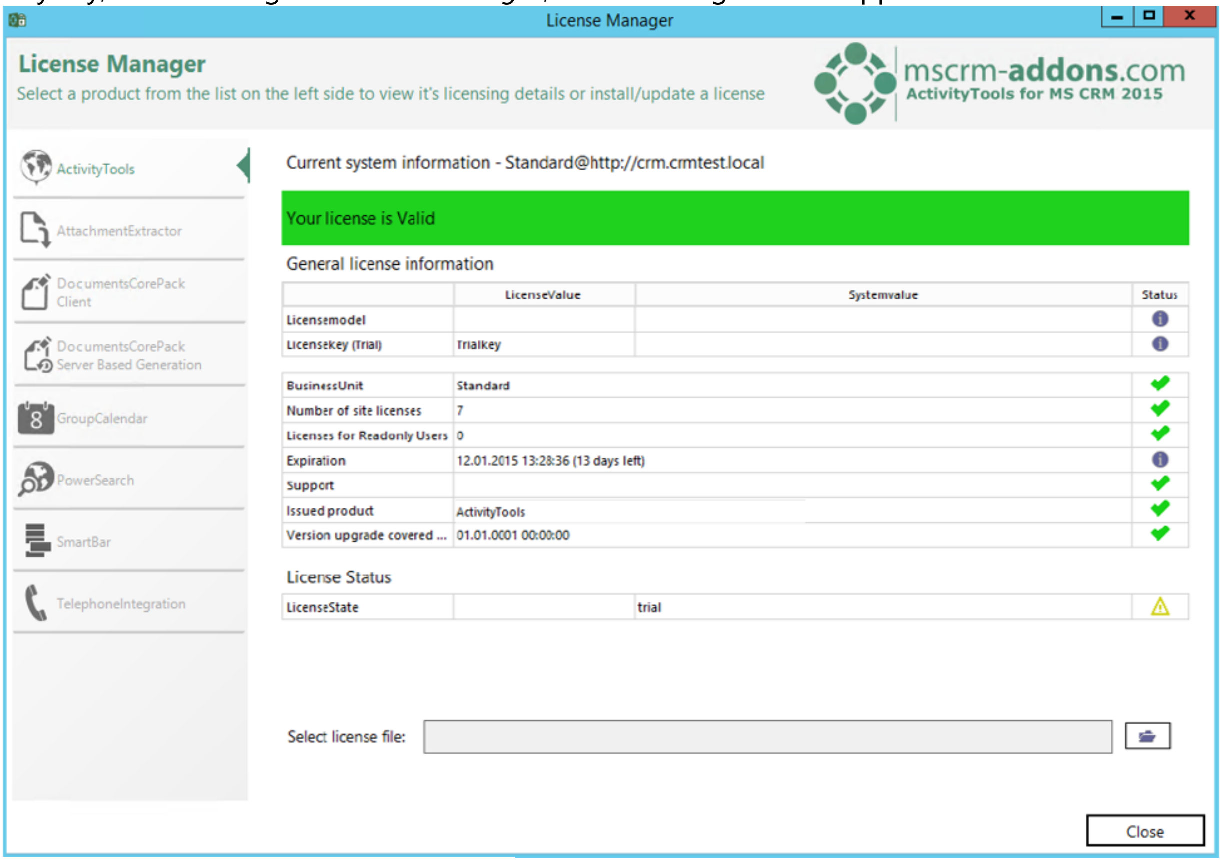


Figure 30: License Manager

The above figure shows a license that is valid. For further information on the License Manager, please have a look at our [License Manager Installation & User Guide]() in the download-section of our website.

Please upload the license text file sent by our support-team with a click on the folder-symbol:

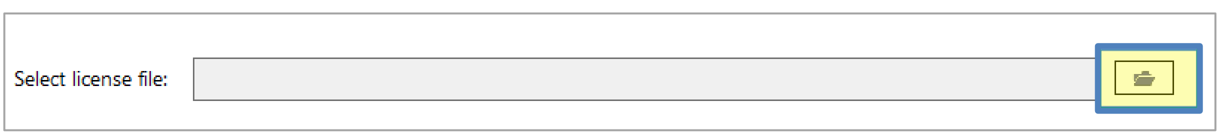


Figure 31: Select license file

In case you have any problems with your license, please do not hesitate to contact us immediately. To guarantee quick processing, we kindly ask you to send us an email with an attached screenshot of the issue to support@mscrm-addons.com. Our support team is looking forward to providing you with answers and solutions.

5 Configuration Page

The configuration of ActivityTools is very simple. To open the configuration, navigate to

CRM -> Settings -> mscrm-addons -> ActivityTools.

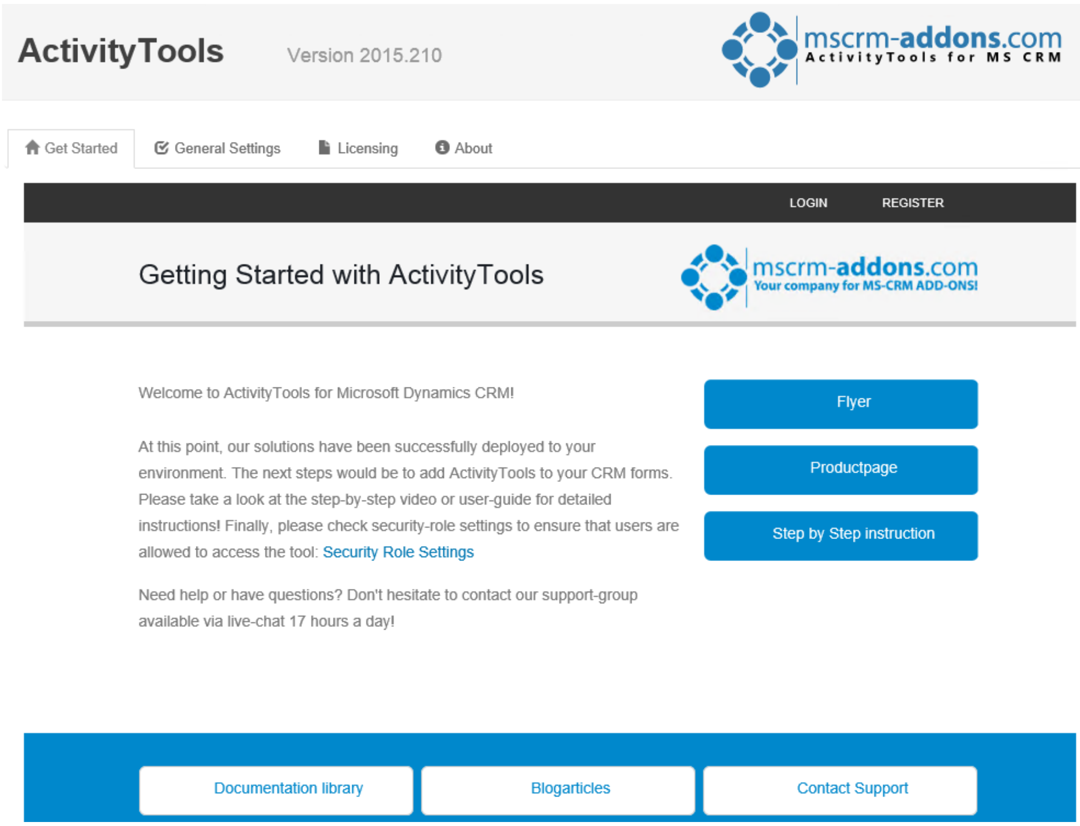


Figure 32: ActivityTools Configuration Page

The window that opens now is the *ActivityTools Configuration Page*. Its functionalities will be explained during the following chapters.

5.1 The Getting Started -Tab

This tab provides you with an overview, general information on ActivityTools and links to our website. All useful information about ActivityTools can be found here. If you scroll down the page, you might even find the different pricings for ActivityTools, a link to the documentation library, a link to some awesome blog articles and a contact button that links you directly with our support.

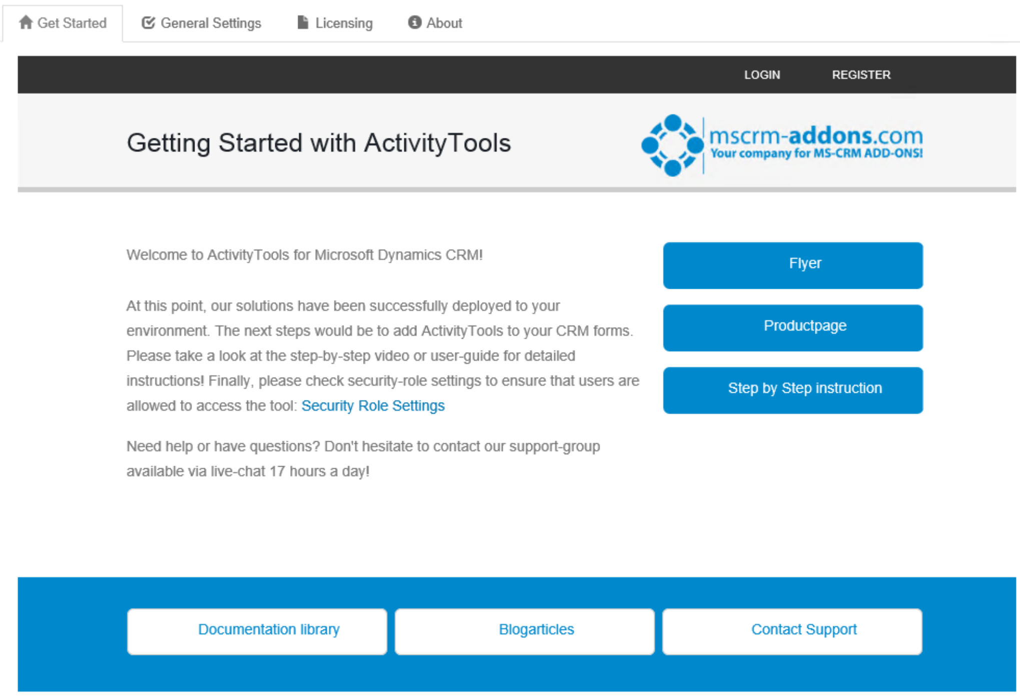


Figure 33: ActivityTools Configuration Page – Getting Started tab

5.2 The General Settings -Tab

This tab allows you to change your general settings. Once changed, please do not forget to save the settings!

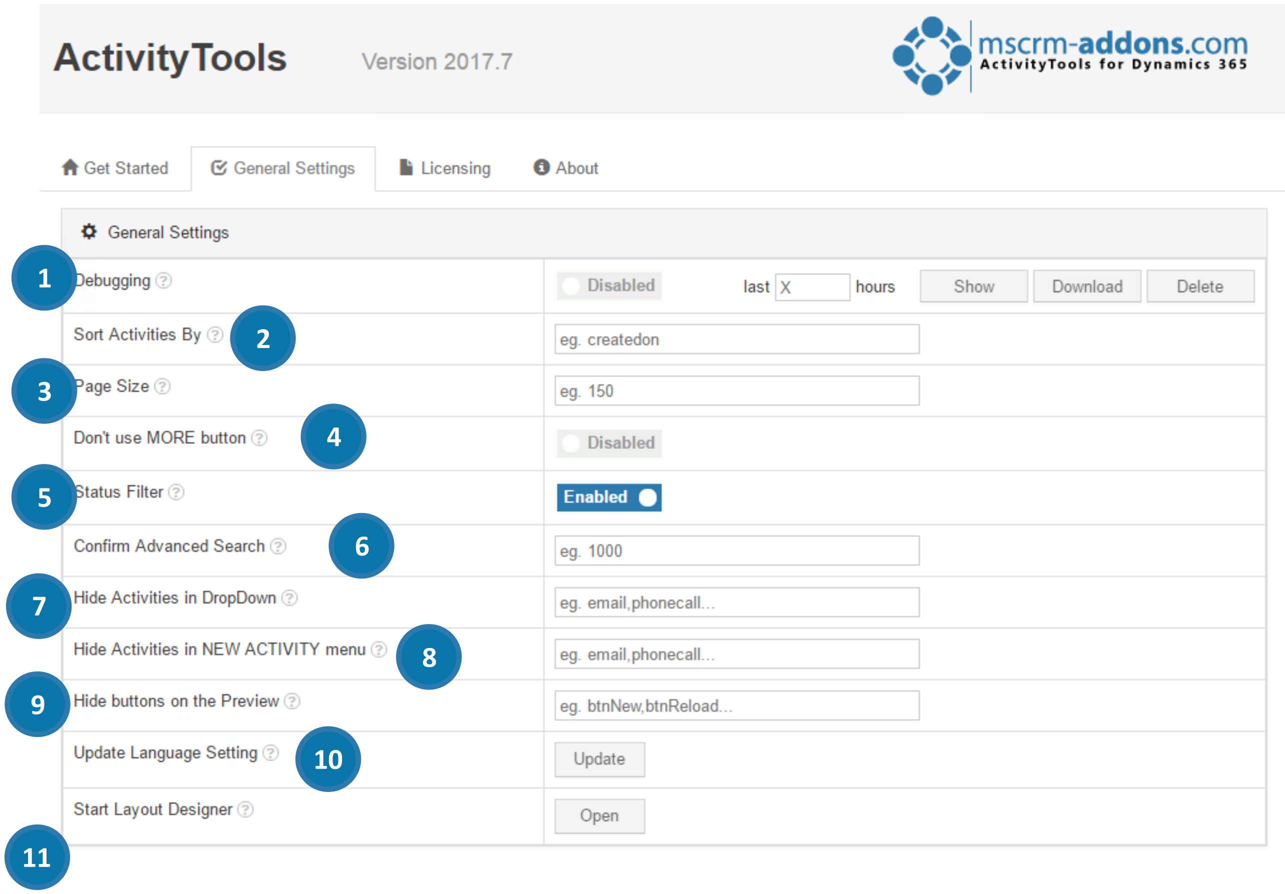


Figure 34: ActivityTools Configuration – General Settings tab

1 DEBUGGING

Set this option on *enabled* if you want to activate debugging. Once activated, you can use the buttons at the right side to modify the debugging process.

Figure 35: ActivityTools Debugging enabled for the last 24 hours

Clicking on the ***[Show]***-button displays all logs that were generated during the last xx hours (in this example 24 hours)

A click on the ***[Download]***-button allows you to download the log-file (.xml).

The ***[Delete]***-button enables you to delete the log-files.

2 Sort Activities By

This setting can be used to define how the activities in the gird should be sorted.

If the setting is empty the default sort order will be used. For more info please check this article: http://www.mscrm-addons.com/Blog/PostId/9986/default-sort-order-for-activitytools

In case you want to define a custom sort order you have two options.

1. Sort all activates based on a date-field of the ActivityPointer-entity. Just fill in the logicalname of the field (e.g. createdon).
2. Different date-fields should be used for different activity types. This can be done by using a custom XML, see underneath.

Example XML

```
<order def="createdon,scheduledstart,actualstart,actualend,modifiedon">
        <ent id="email" val="modifiedon,actualend,actualstart"></ent>
        <ent id="letter" val="modifiedon"></ent>
        <ent id="appointment" val="modifiedon"></ent>
        <ent id="phonecall" val="modifiedon"></ent>
        <ent id="task" val=".ptm_customdatafield"></ent>
</order>
```

In the first line, you can insert a comma separated list of date fields which must stem from the ActivityPointer entity. This is the default sorting if no specific sorting for an activity has been set (AT tries to get the value of the first field. If null it tries to take the value of the next and so on).

If you would like to apply a sorting, you can define one or more date fields for every activity type (email, letter…). The activities will be sorted by these date fields.

```
<ent id="letter" val="modifiedon"></ent>
```

id="letter" : logical name of the activity

val="modifiedon" : Insert one or more date fields comma separated

Date fields that are only on the specific activity, must be marked with a dot. (e.g.: .ptm_customdatafield)

❸ Page Size

Define here how many records should be displayed at once.

❹ Don't use MORE button

If this setting is set to true, all related activities will be loaded automatically in case of filtering.

❺ Status Filter

With this setting you can activate and deactivate the Status Filter. With the status filter activated, you can filter your activities according to the four activity states (Open, Completed, Canceled, Scheduled). These options will be added into the dropdown box on the left side from ActivityTools. If you activate this setting the first time, please hit the ***[Update]***-button form the Update Language Setting.

Once you have done so, you will be provided with the following status fields:
Open
Completed
Canceled
Scheduled

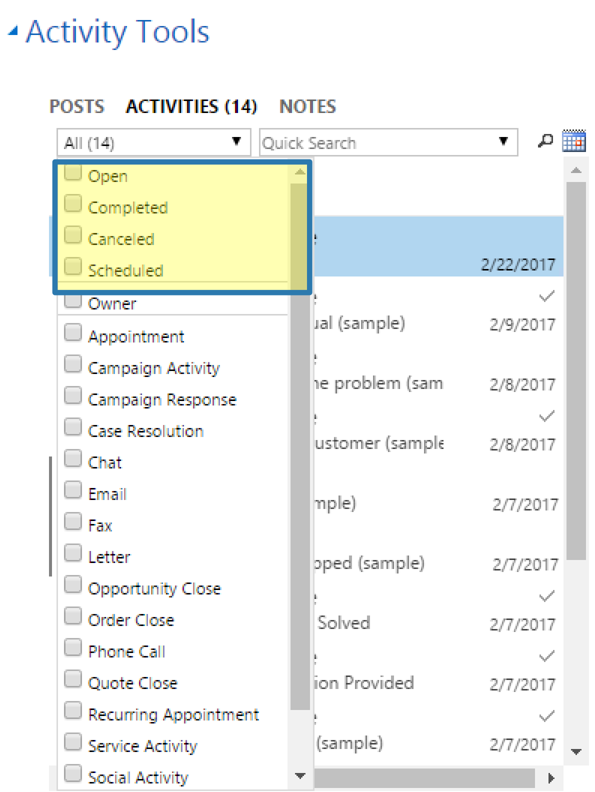


Figure 36: Status Filter Result

❻ Confirm Advanced Search

Whenever you start a *content search* with ActivityTools and there are more than 1000 activities to look up, you automatically get the following message:

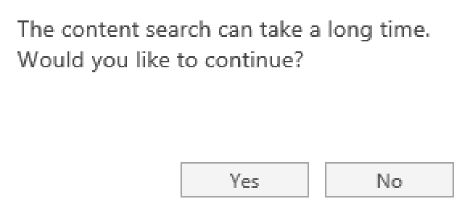


Figure 37: Content Search dialog

With the *confirm advanced search* setting, you can define, when the dialog should appear (depending on the number of activities). To deactivate this setting, simply set the number of activities to *0*.

❼ Hide Activities in DropDown

Here you can define activity-types which should not be displayed in the dropdown box on the left side. Please type in a comma separated list of the logical names (e.g. email, phone call).

❽ Hide Activities in NEW ACTIVITY menu

Here you can define activity-types which should not be displayed in the NEW ACTIVITY menu on the right side. Please type in a comma separated list of the logical names (e.g. email, phone call).

❾ Hide Buttons on the Preview

Here you can define buttons which should not be displayed in the Preview on the right side. Please type in a comma separated list of the HTML IDs of the buttons. Here is a list of the buttons with the HTML IDs:

NEW ACTIVITY (btnNew), RELOAD (btnReload), LOAD ALL (btnLoadAll), OPEN (btnOpenRec), PRINT (btnPrint), Close (btnCloseActivity), SEND (btnSend), FORWARD (btnForward), REPLY ALL (btnReplyAll), REPLY (btnReply)

For example: “btnNew,btnPrint” to hide the NEW ACTIVITY and the PRINT buttons.

⑩ Update Language Setting

Click on this button to update the ActivityTools settings with the latest information of the CRM Activity-entities. This can be useful in the following cases:

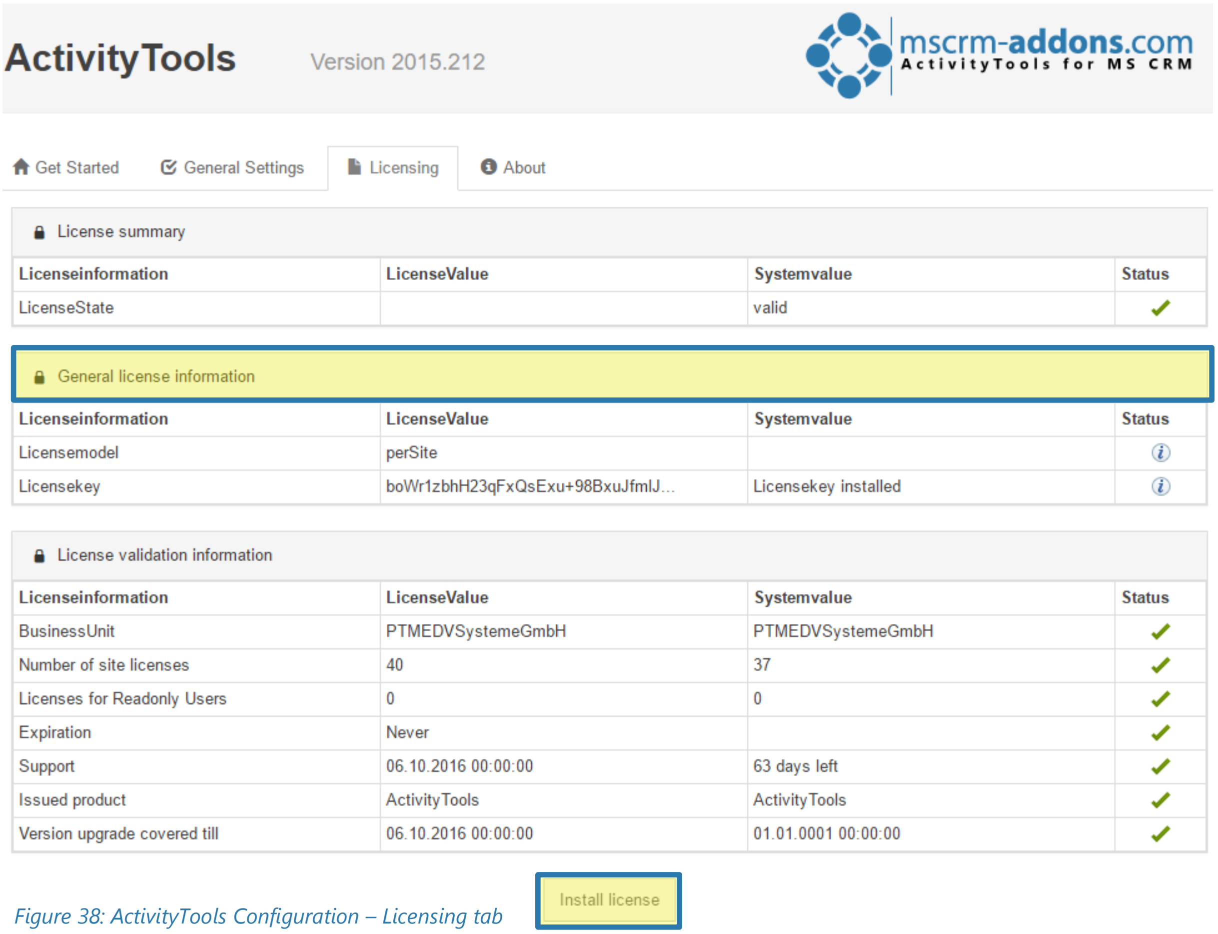
- You have created a new custom Activity-entity in CRM, but ActivityTools does not show it in the *DropDown* or *New Activity* section.
- You have installed a new CRM language, but in the *DropDown* and *New Activity* section you still see labels in a wrong language.

⑪ Start Layout Designer

Click on the ***[Open]***-button in order to open the Layout Designer. For more information on the Layout Designer, please have a look at chapter 7 How to use Activity Tools Layout Designer on page 66.

5.3 The Licensing -Tab

This tab provides you with information regarding to the status of your license. Green checkmarks mean that your license is valid. Red crosses mean that your license is invalid.



License summary

Licenseinformation	LicenseValue	Systemvalue	Status
LicenseState		valid	✓

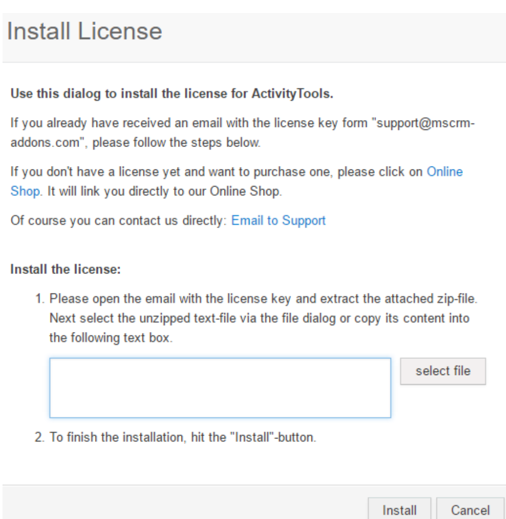
General license information

Licenseinformation	LicenseValue	Systemvalue	Status
Licensemodel	perSite		ⓘ
Licensekey	boWr1zbhH23qFxQsExu+98BxuJfmlJ...	Licensekey installed	ⓘ

License validation information

Licenseinformation	LicenseValue	Systemvalue	Status
BusinessUnit	PTMEDVSystemeGmbH	PTMEDVSystemeGmbH	✓
Number of site licenses	40	37	✓
Licenses for Readonly Users	0	0	✓
Expiration	Never		✓
Support	06.10.2016 00:00:00	63 days left	✓
Issued product	ActivityTools	ActivityTools	✓
Version upgrade covered till	06.10.2016 00:00:00	01.01.0001 00:00:00	✓

Figure 38: ActivityTools Configuration – Licensing tab



Install License

Use this dialog to install the license for ActivityTools.

If you already have received an email with the license key form "support@mscrm-addons.com", please follow the steps below.

If you don't have a license yet and want to purchase one, please click on Online Shop. It will link you directly to our Online Shop.

Of course you can contact us directly: Email to Support

Install the license:

1. Please open the email with the license key and extract the attached zip-file. Next select the unzipped text-file via the file dialog or copy its content into the following text box.
   select file
2. To finish the installation, hit the "Install"-button.

Install Cancel

Figure 39: ActivityTools Install License dialog

If you click on the ***[Install license]***-button, the *Install License dialog* opens.

Enter your license key here. To do so, simply follow the information provided by the dialog.

5.4 The About -Tab

The About – Tab provides you with general information regarding to your license and the Copyright.

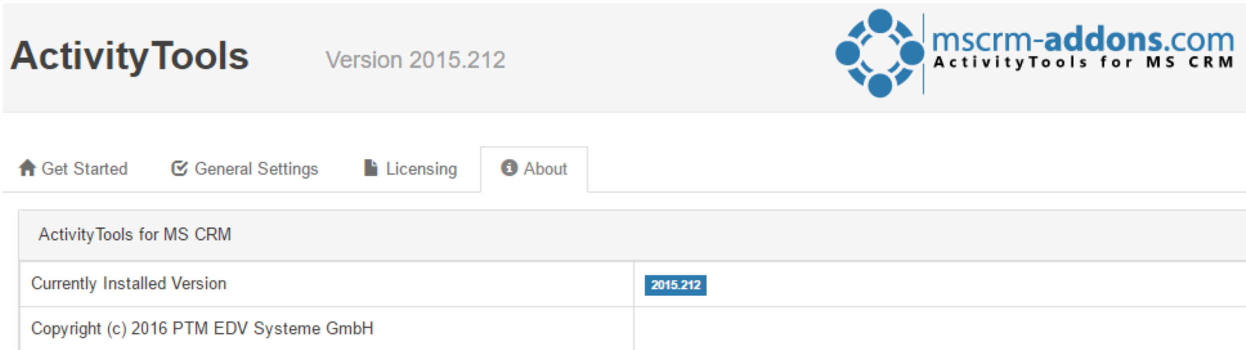


Figure 40: ActivityTools Configuration – About tab

5.5 Additional settings

Most of the settings can be set in the general tab. However, there are a few that must be set manually in the ActivityTools product.

To open the ActivityTools product with settingskeys, please navigate to Settings > Products > ActivityTools. Here, you are provided with an overview on all the ActivityTools settingskeys.

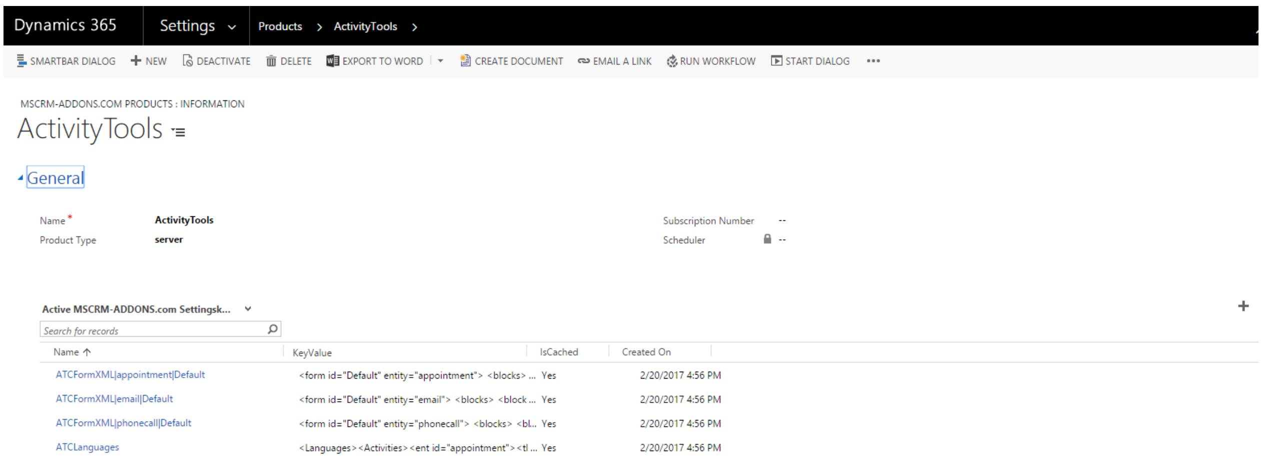


Figure 41: ActivityTools product settings

Please add a new Settingskey-record to define a new ActivityTools setting. If you haven't created a settingskey so far, please have a look [at this article](). During the next chapters, you will find brief tutorials on how to add additional settings like custom buttons, format grid items or a plugin filter.

5.5.1 Custom buttons

Via the “ATCCustomButtons” setting custom buttons can be added to the top of the preview. On click, they execute a defined custom JScript function.

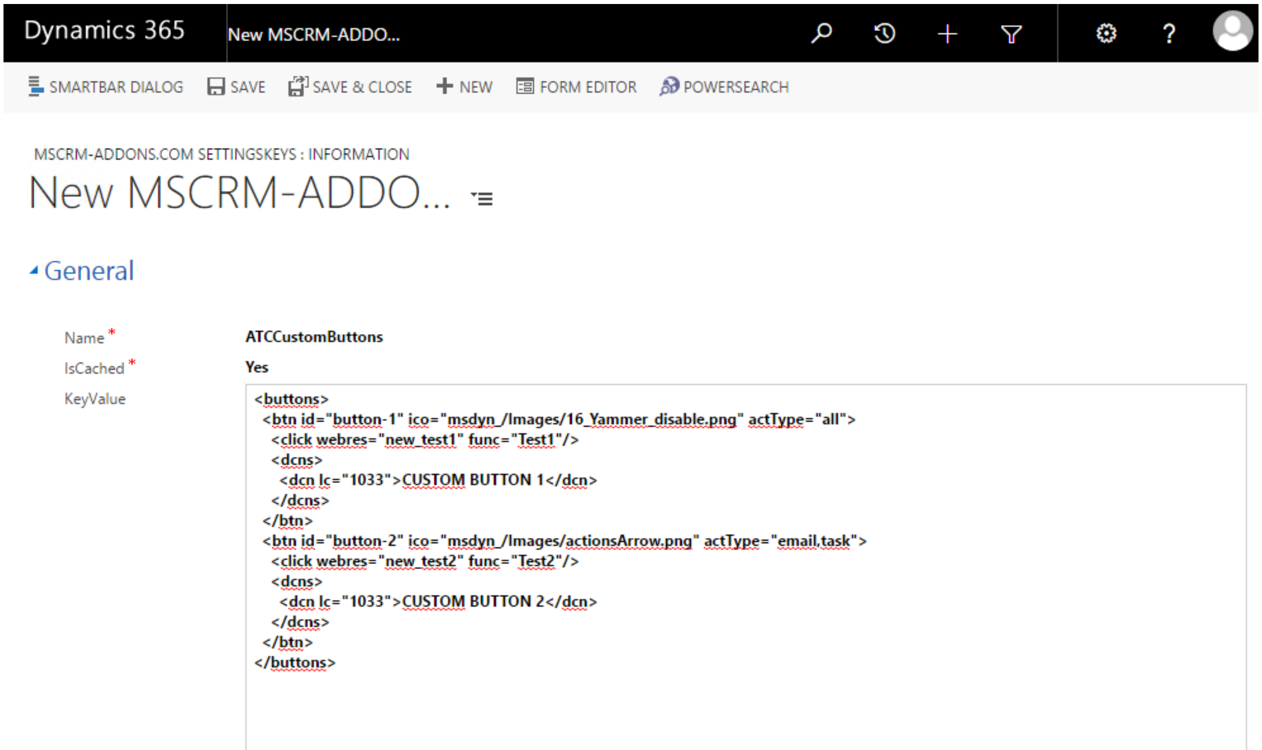


Figure 42: ATCCustomButtons settingskey

Example XML:

```
<buttons>
 <btn id="button-1" ico="msdyn_/Images/16_Yammer_disable.png" actType="all">
  <click webres="new_test1" func="Test1"/>
  <dcns>
   <dcn lc="1033">CUSTOM BUTTON 1</dcn>
  </dcns>
 </btn>
 <btn id="button-2" ico="msdyn_/Images/actionsArrow.png" actType="email,task">
  <click webres="new_test2" func="Test2"/>
  <dcns>
   <dcn lc="1033">CUSTOM BUTTON 2</dcn>
  </dcns>
 </btn>
</buttons>
```

Every btn node represents a custom button. It needs a unique ID that must start with button-XXXX defined in the id attribute.

Via its icon attribute the icon of the button can be defined. For example, insert the name of CRM web resource containing an image.
If you want the button to be visible for all activity types, please insert 'all' into the actType attribute. Otherwise, simply enter the logical name of every activity type you want the button to be visible for separated by comma.
The click node defines what should happen on button-click. The webres attribute must contain the name of the JScript CRM webresource containing the script. The func attribute the name of the function which should be executed.
The dcn nodes are used to define the display text of the button. For each language a different text can be defined. The lc attribute has to contain the language code and the node value the display text.

This is how the buttons the buttons will look like by using the above XML:

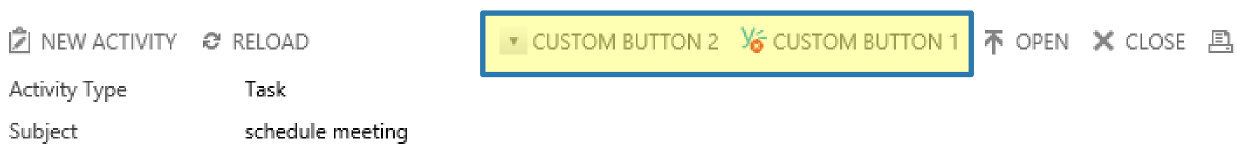


Figure 43: Custom button - Result

5.5.2 Grid Custom Columns

Via the "GridCustomColumns" setting custom columns can be added to the grid of ActivityTools. This can be used to display additional CRM fields.

More information can be found here.

5.5.3 ATPluginFilter

Via the “ATPluginFiler” setting you can define custom activity filter options.
For example, to show only related activities which a specific Dynamics 365 user is involved in.

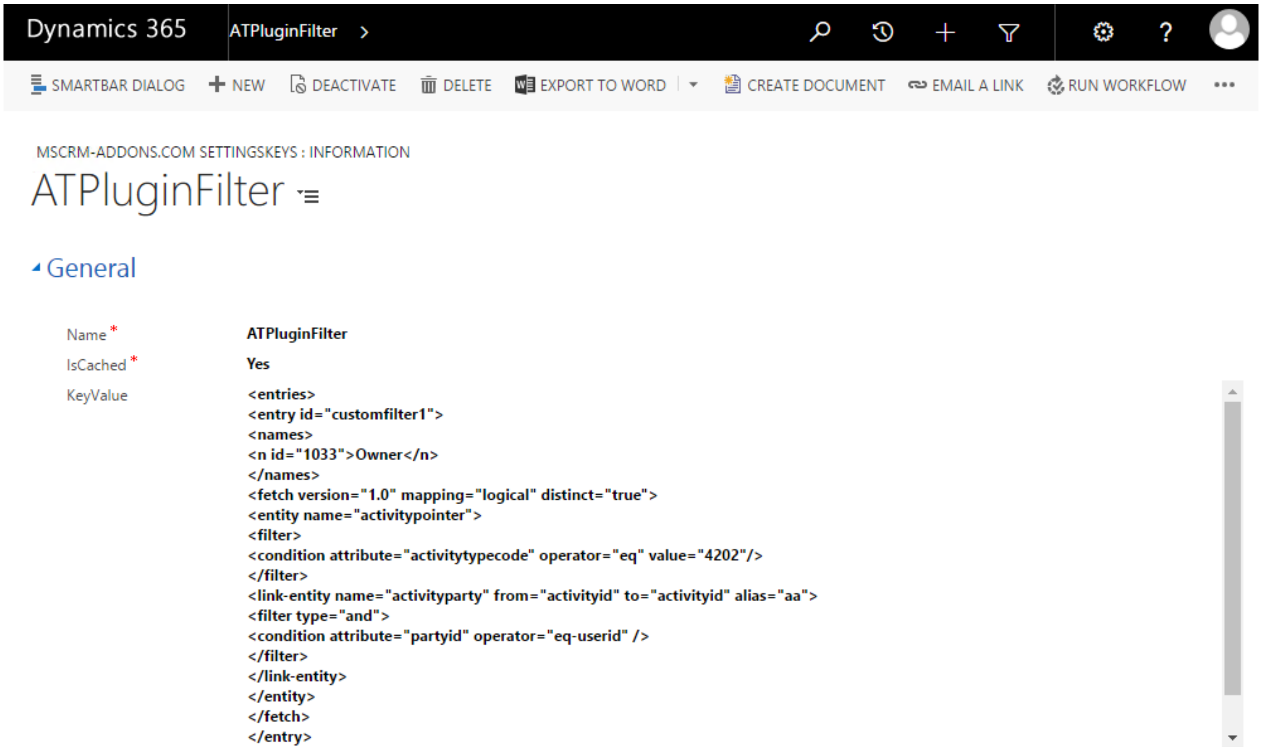


Figure 44: ATPluginFilter

Example XML:

```
<entries>
 <entry id="customfilter1">
  <names>
   <n id="1033">Owner</n>
  </names>
  <fetch version="1.0" mapping="logical" distinct="true">
   <entity name="activitypointer">
    <filter>
     <condition attribute="activitytypecode" operator="eq" value="4202"/>
    </filter>
    <link-entity name="activityparty" from="activityid" to="activityid" alias="aa">
     <filter type="and">
      <condition attribute="partyid" operator="eq-userid"   />
     </filter>
    </link-entity>
   </entity>
  </fetch>
 </entry>
</entries>
```

Every entry node represents a filter option in the dropdown menu of ActivityTools. Its id attribute must contain a unique ID, for example customfilter1, customfilter2, customfilter3 etc.

Optional you can add the showfor attribute to only show the filter for ActivityTools embedded on specific entities (e.g. only show if embedded on the case or lead entity: showfor="incident,lead").

N nodes contain the display text per language. Every n node contains the language code in its id attribute and the display text is the value.

Next, insert a fetch XML. The conditions will be used to filter the related activities.
The easiest way to generate the fetch is via CRM by using the Advanced Find.
Please note, the main entity of the fetch has to be the activitypointer entity. From there you can add relationship to related entities (e.g. activityparty).
Our example filter will only show email activities which contain the current user in any party list field (e.g. From, To, CC, BCC, …).

By using the above filter XML the "Owner"-entry will be added. If the filter is checked it takes effect after closing the dropdown box.

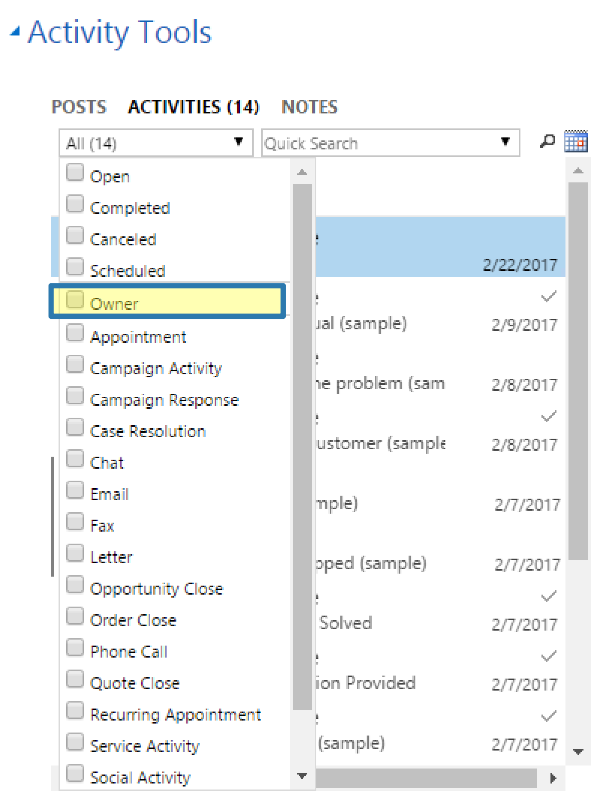


Figure 45: ATPluginFilter Result

5.5.4 Format Grid Items

By using the “ATFormatGridItems” setting you can define a custom styling for specific activities in the grid. E.g. highlight all draft emails in the grid.

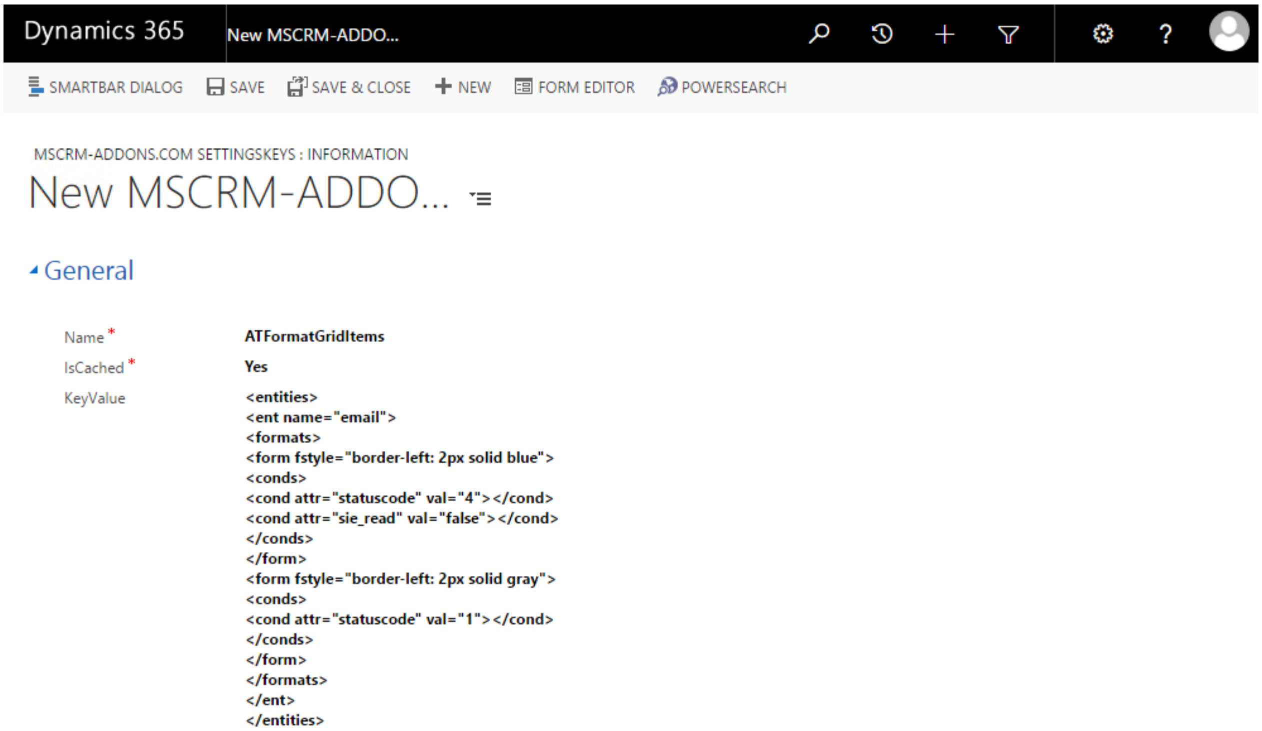


Figure 46: ATFormatGridItems

Example XML:

```
<entities>
  <ent name="email">
    <formats>
      <form fstyle="border-left: 2px solid gray">
        <conds>
          <cond attr="statuscode" val="4"></cond>
        </conds>
      </form>
      <form fstyle="border-left: 2px solid blue;">
        <conds>
          <cond attr="statuscode" val="1"></cond>
        </conds>
      </form>
    </formats>
  </ent>
</entities>
```

Every ent name node must contain the logical name of the activity which should be formatted. Each can have multiple form nodes, which contain the format settings defined in the fstyle attribute. The value has to be one or more valid css statements (same as inline style in HTML). The cond node allows to configure conditions. Its attr attribute has to contain the logical name of a CRM field of the activity, its val attribute a possible value. Only if all conditions are true, the formatting will be used. It is required to add at least one condition. For example:

<cond attr="statuscode" val="4"></cond>

attr: the logical name of a CRM attribute of the activity, here: statuscode
val: the value the activity must have to be formatted, here: 4

This is the result by using the above XML:

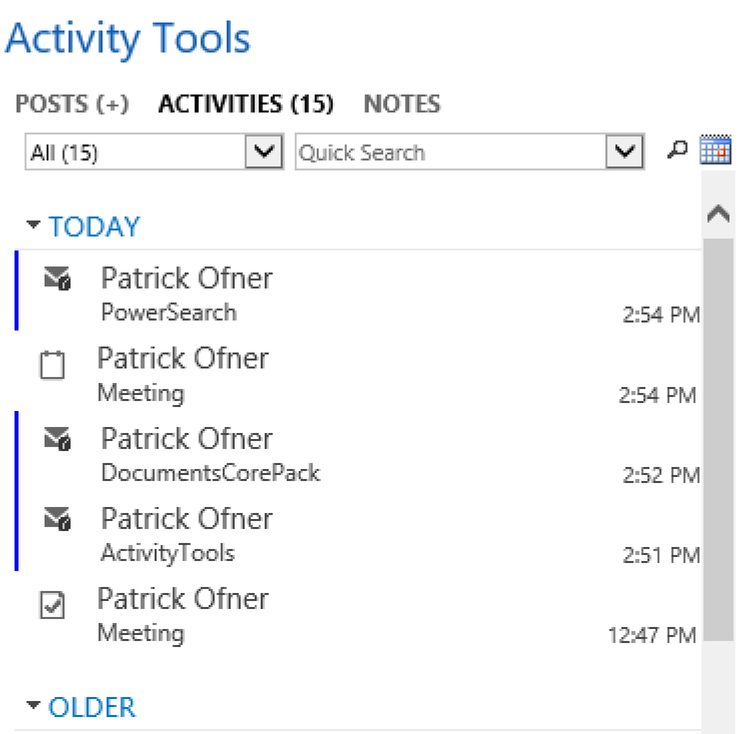


Figure 47: Result by using XML

Another example would be to format activities with priority “High”:
<cond attr="prioritycode" val="2"></cond>

6 How to embed ActivityTools in Microsoft Dynamics CRM

To embed ActivityTools into CRM you have a few different options. Either you embed ActivityTools

- via form script into CRM Social Pane

(please have a look at chapter 6.1 Embed ActivityTools via form script into CRM Social Pane on page 42 for more information)

- via Web Resource

(please have a look at chapter 6.2 Embed ActivityTools via Web Resource on page 47 for more information)

- into Form Menu – Entity Related Preview

(please have a look at chapter 6.3 Embed ActivityTools into Form Menu – Entity Related Preview on page 50 for further information)

- in Dashboards

(please have a look at chapter 6.4 Embed ActivityTools in Dashboards on page 55 for further information)

- in CRM SiteMap – User Related Preview

(please have a look at chapter 6.5 Embed MyActivities in on page 59 for further information)

6.1 Embed ActivityTools via form script into CRM Social Pane

ActivityTools can be embedded via form script into CRM Social Pane on any entity. It simply replaces the CRM integrated social pane-activities. Usually, the CRM activity section looks like the figure below.

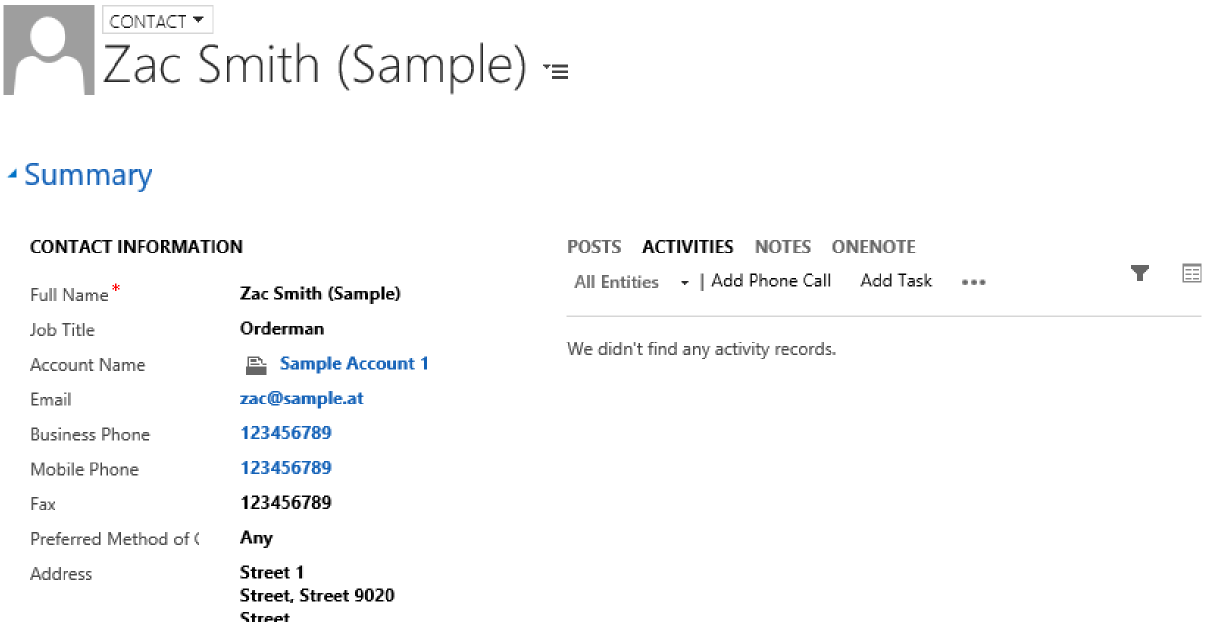


Figure 48: Regular CRM Activity Section

To integrate ActivityTools, open a random record and click on the ***[Form]***-button in the command bar.

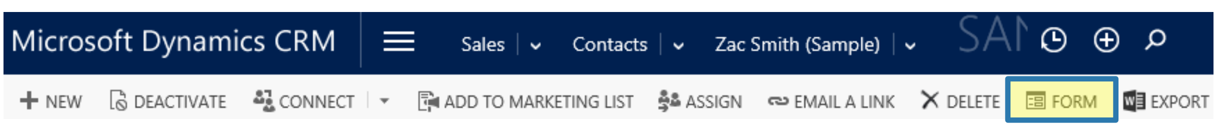


Figure 49: Command bar: [Form]-button

In the next window select the Home-tab and select the ***[Form Properties]***-button.

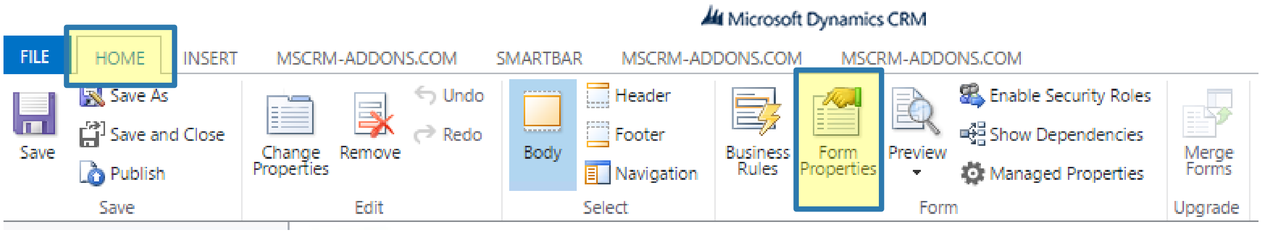


Figure 50: Open form properties

In the following window, click on the ***[+ Add]***-button in the “Form Libraries” section.

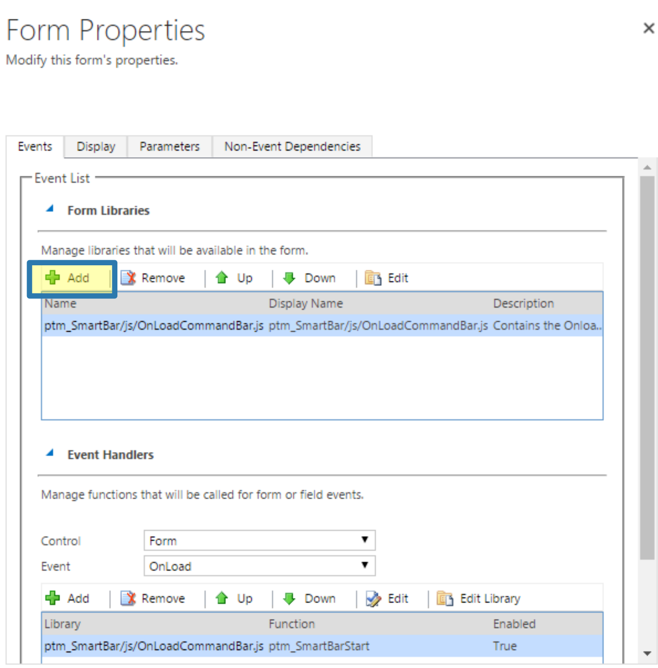


Figure 51: Form properties window

This action opens a Look-up window.

For Dynamics 365 versions of ActivityTools, search for *ptm_ActivityTools/**Extension**/js/onload.js* and click the ***[Add]***-button. If you cannot find the „ptm_ActivityTools/Extension/js/onload.js" web resource, please ensure that you have the "ActivityToolsPluginExtension" solution installed. For more information please check at CHAPTER ADDITIONAL INFORMATION FOR DYNAMICS 365 VERSIONS ONLY: ON PAGE 18. If you have installed ActivityTools via AppSource you can also find the "ActivityToolsPluginExtension" solution here.

For CRM 2015/2016 version of ActivityTools, search for *ptm_ActivityTools/js/onload.js* and click on the ***[Add]***-button, like you can see in the figure below.

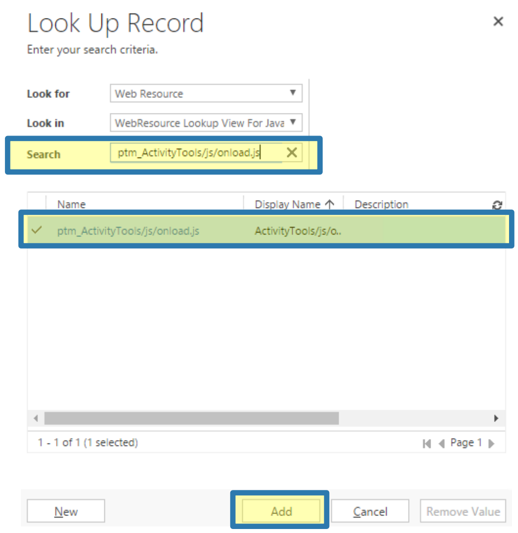


Figure 52: ActivityTools Look-up window

Now the *Form Properties* window should look like the below figure.

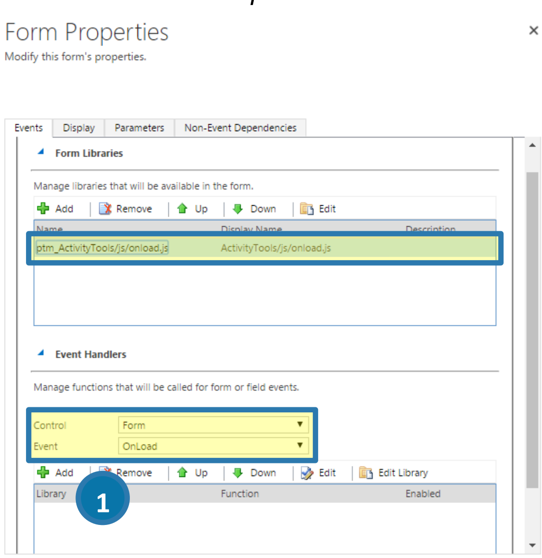


Figure 53: Form properties

Make sure that the settings look like above.

Then click on the ***[Add]***-button 1 in the *Event Handlers* section.

The following window opens:

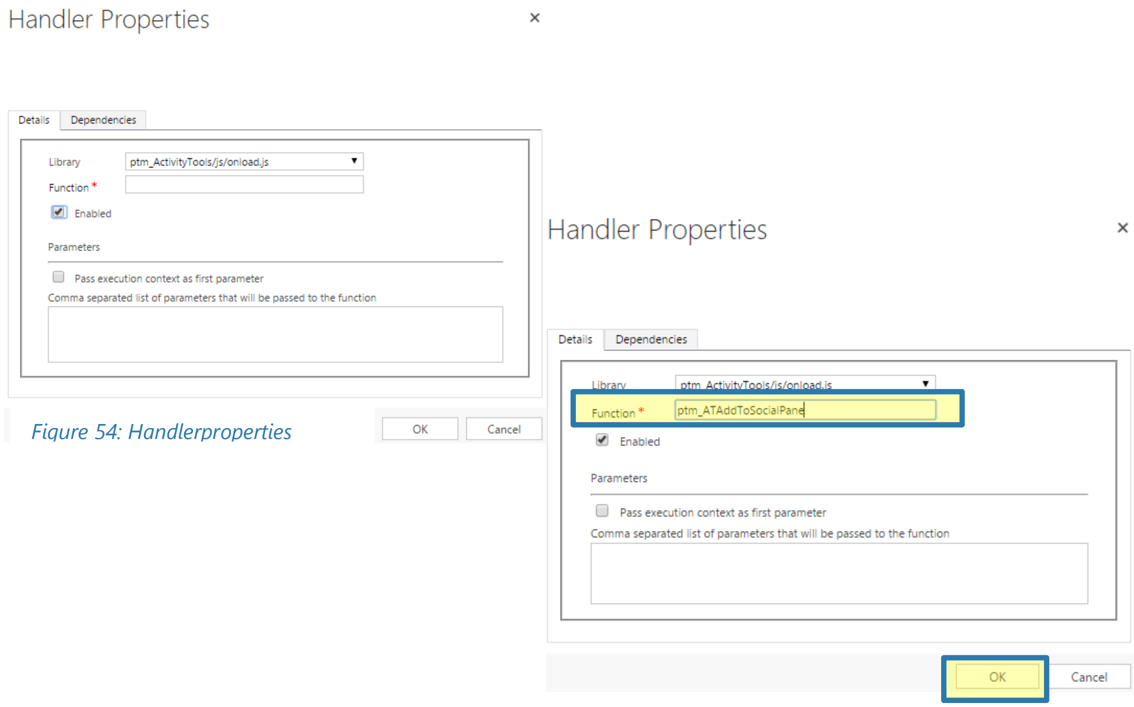


Figure 54: Handlerproperties

Insert *ptm_ATAddToSocialPane* to the *Function**-Textbox and click on the ***[OK]***-button. Also, in the next window, click on the ***[OK]***-button in order to proceed.

In the next overview, drag and drop the new form to its future place. Click on the ***[Save]***-button and on the ***[Publish]***-button.

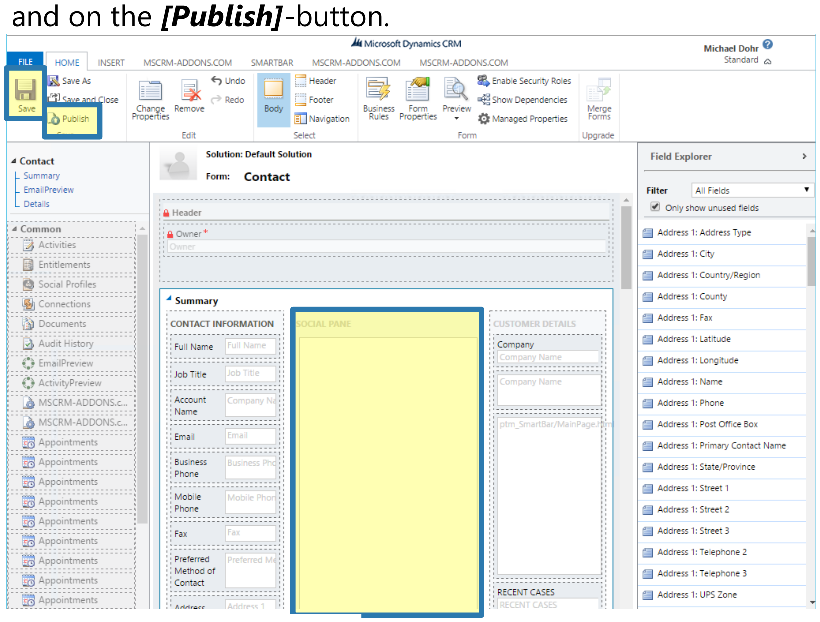


Figure 55: Arrange Social Pane

Now return to your contact entity and refresh the page with F5. This is how your new activity section could look like thanks to ActivityTools:

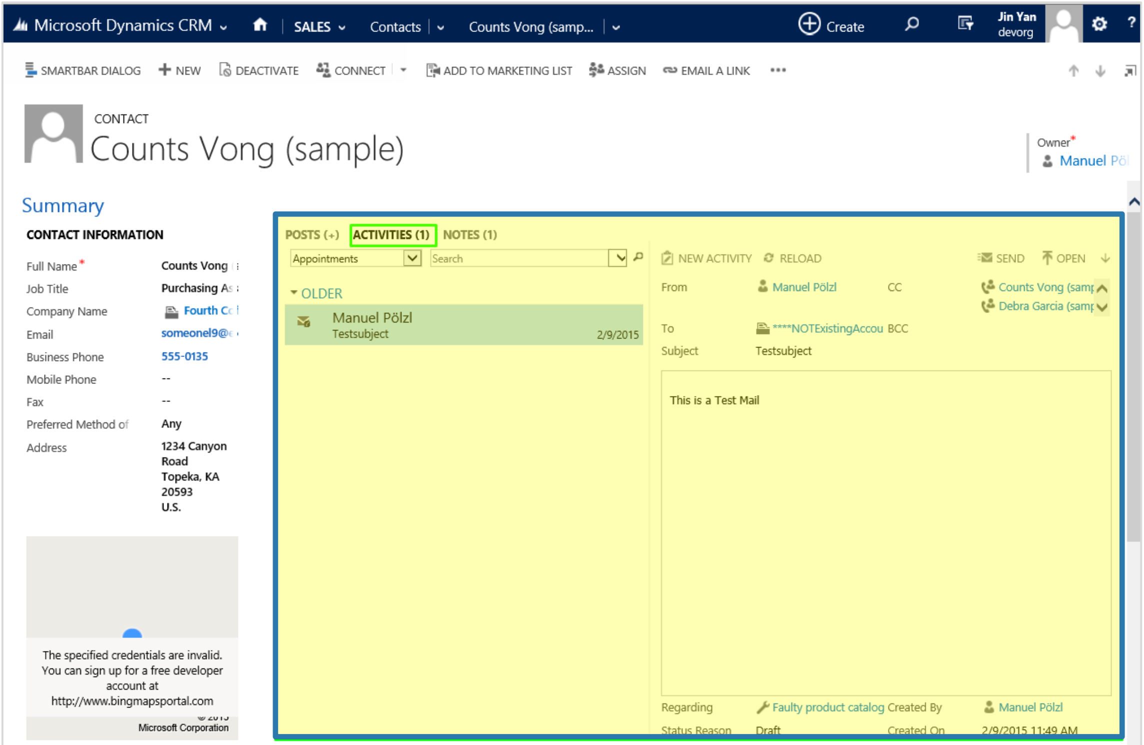


Figure 56: ActivityTools - Result

6.2 Embed ActivityTools via Web Resource

ActivityTools for MS Dynamics CRM 2015/2016 and Dynamics 365 can also be embedded into the entity form at a preferred place. This can be done via web resources. To do so, open the entity into which you want to embed ActivityTools and click the ***[Form]***-button in the command bar.

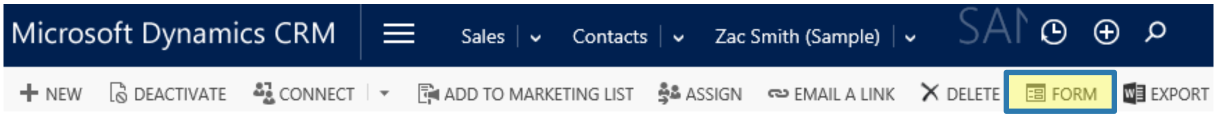


Figure 57: Command bar: [Form]-button

In the next window select the *Insert*-tab and choose select the ***[Web Resource]***-button.

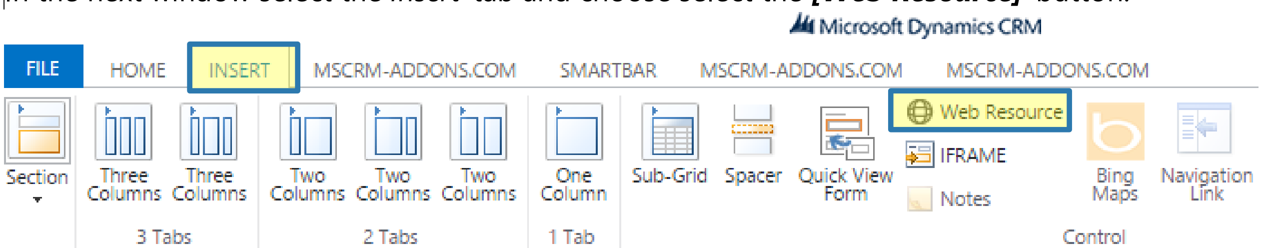


Figure 58: Open Web Resource

The *Add Web Resource*-window opens. Insert *ptm_ActivityTools/MainPage.html* in the web resource field. If it does not appear automatically, click on the *Magnifier* and *Look up More Records*. Anyways, as soon as you have finished your search, select a proper name for your web resource and insert it into the *Field Name and Properties*. Then click on the ***[OK]***-button to proceed.

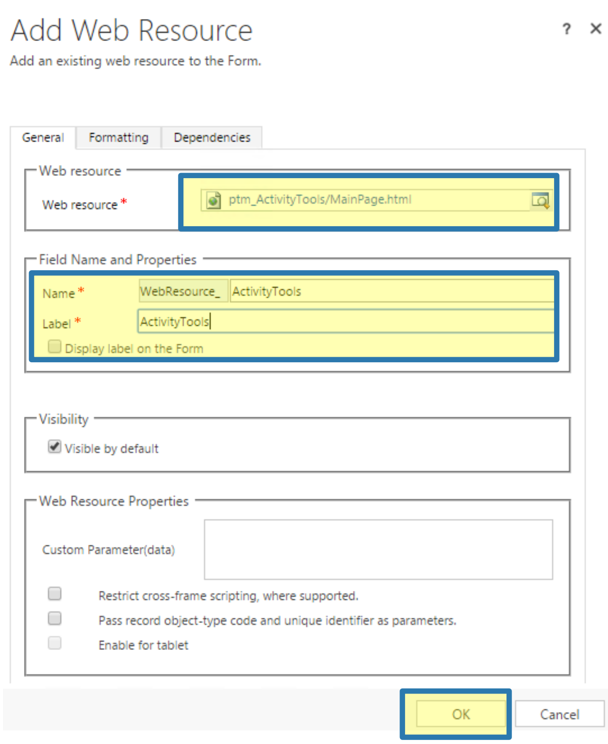


Figure 59: Add Web Resource

In the next overview, drag and drop the new form to its future place. Then return to the *Home*-tab and click on the ***[Save]***-button and on the ***[Publish]***-button.

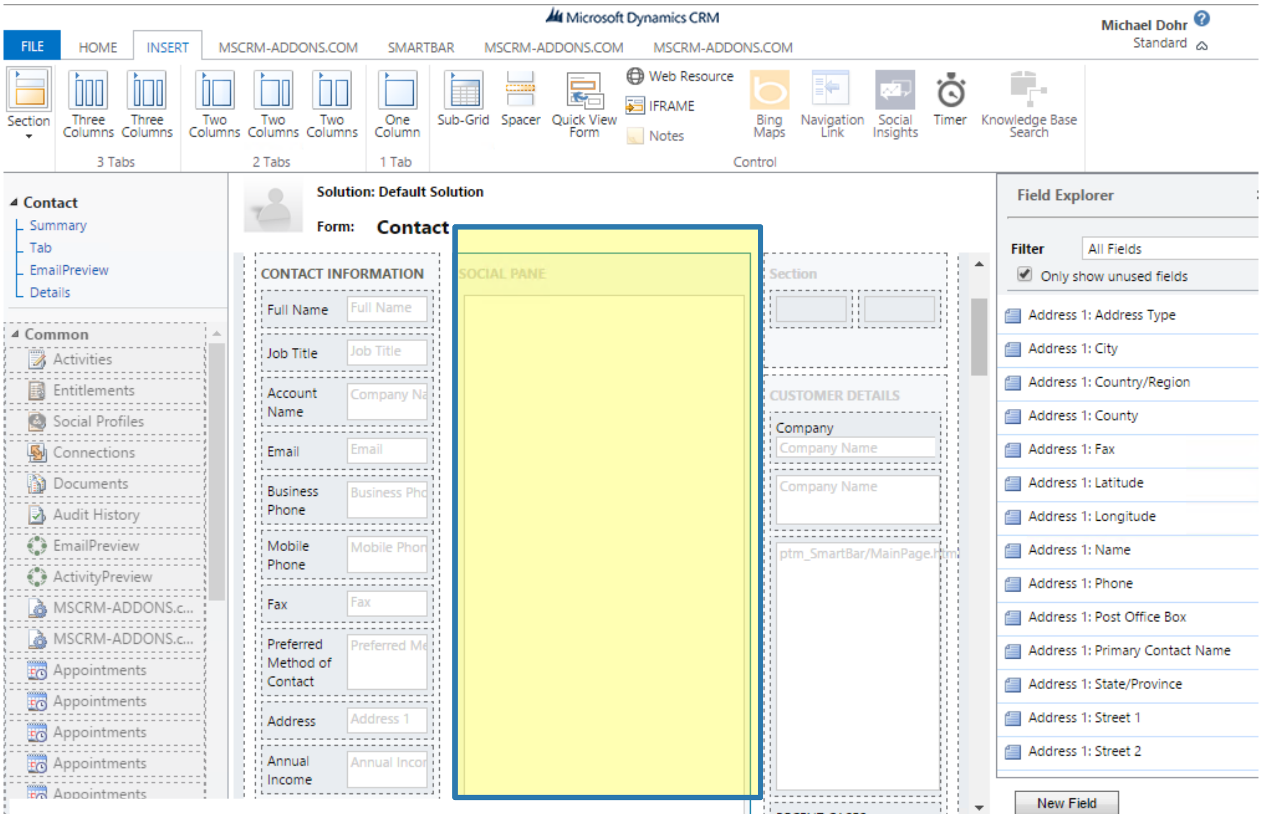


Figure 60: Arrange Social Pane

As soon as the settings are saved, navigate to the entity you wanted to add ActivityTools to. Refresh the page with F5. Your entity should look like the figure below.

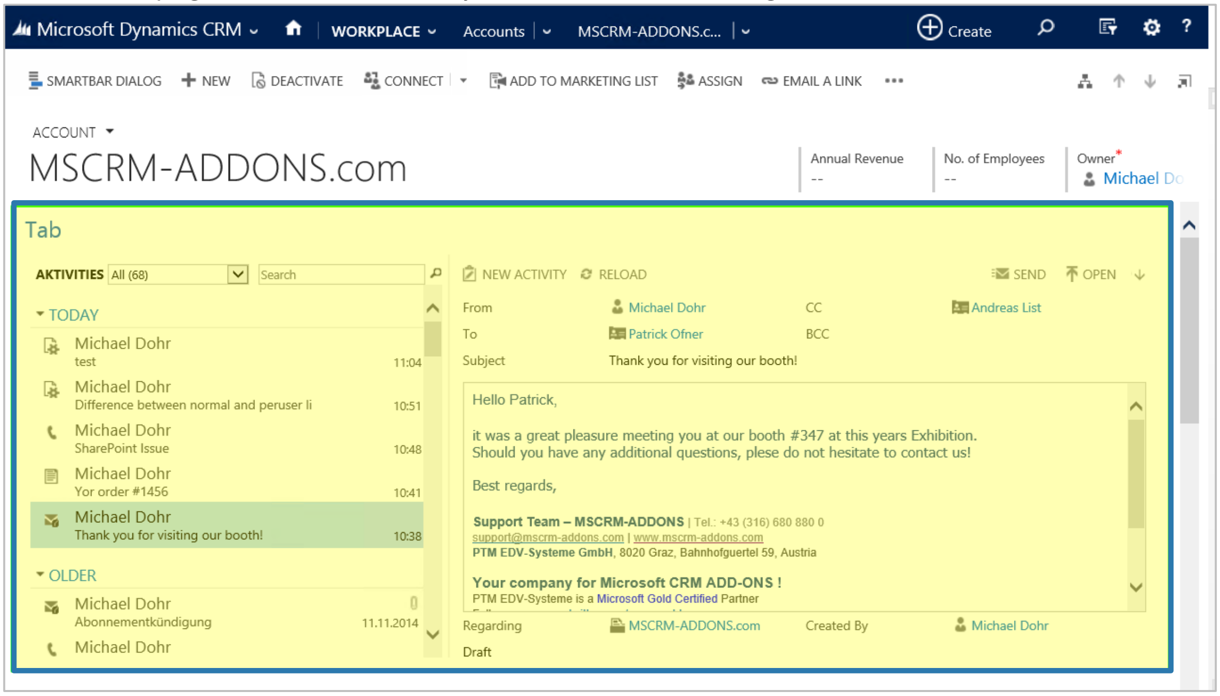


Figure 61: ActivityTools Webresource - Result

6.3 Embed ActivityTools into Form Menu – Entity Related Preview

It is also possible to embed entity-related ActivityTools preview into the CRM command bar via CRM Form Menu. This is very useful in case the preview should only be accessed via command bar without appearing in the entity form itself.

We will integrate the ActivityTools preview into our *Leads*-entity. Therefore, open your CRM and navigate to *Sales* and *Leads*. Click on a random lead to open it.

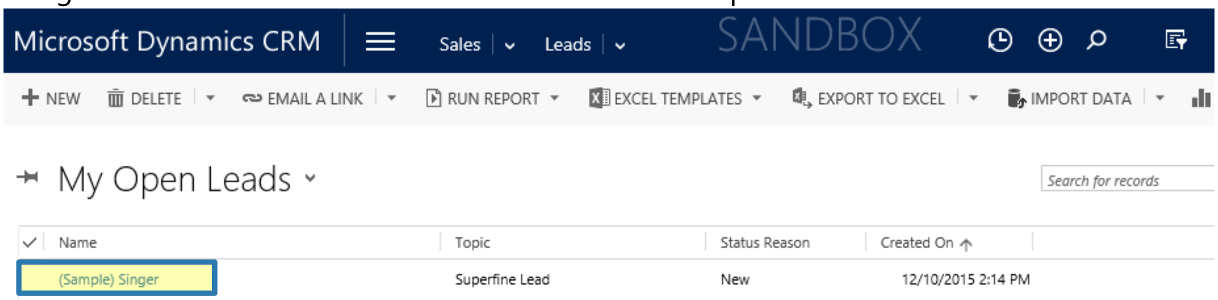


Figure 62: Open Lead

In the command bar of the opened lead, select the *Form Editior*.

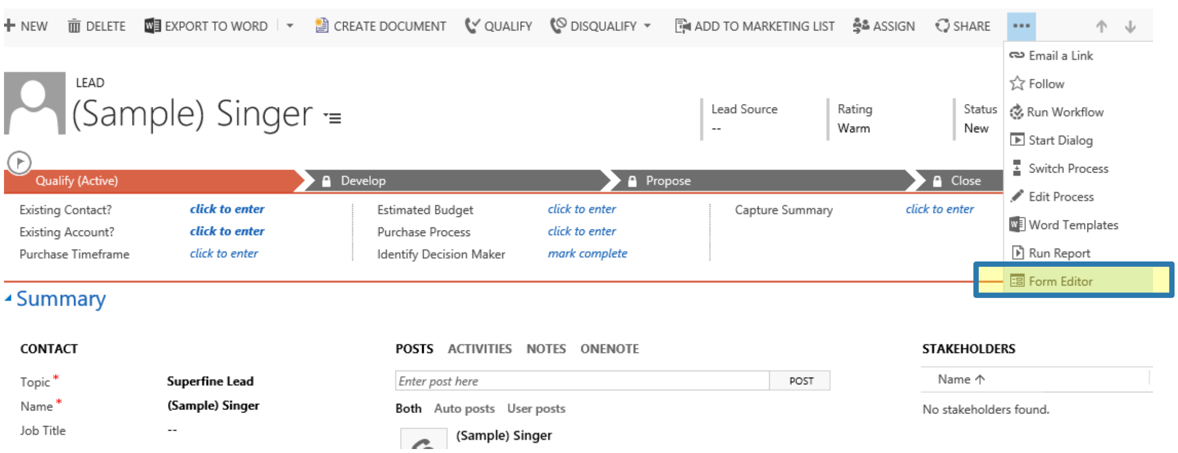


Figure 63: Open the form editor

In the window that opens now, click on *Navigation*. Then, the focus will be set on the Navigation sector. Select the area where the new entry should be added. In our example, we want the preview to be shown within the *Sales area*.

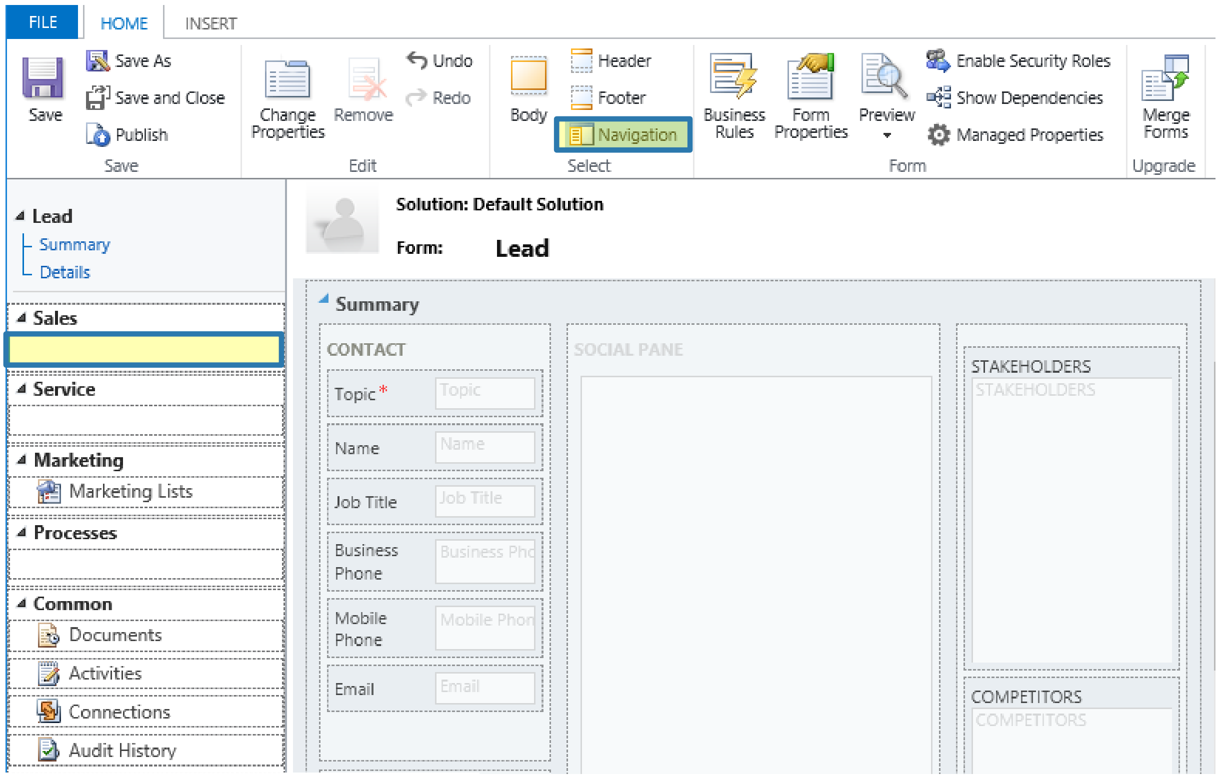


Figure 64: Customize the ActivityTools preview

Now switch to the *Insert*-tab and click on the ***[Navigation Link]***-button.

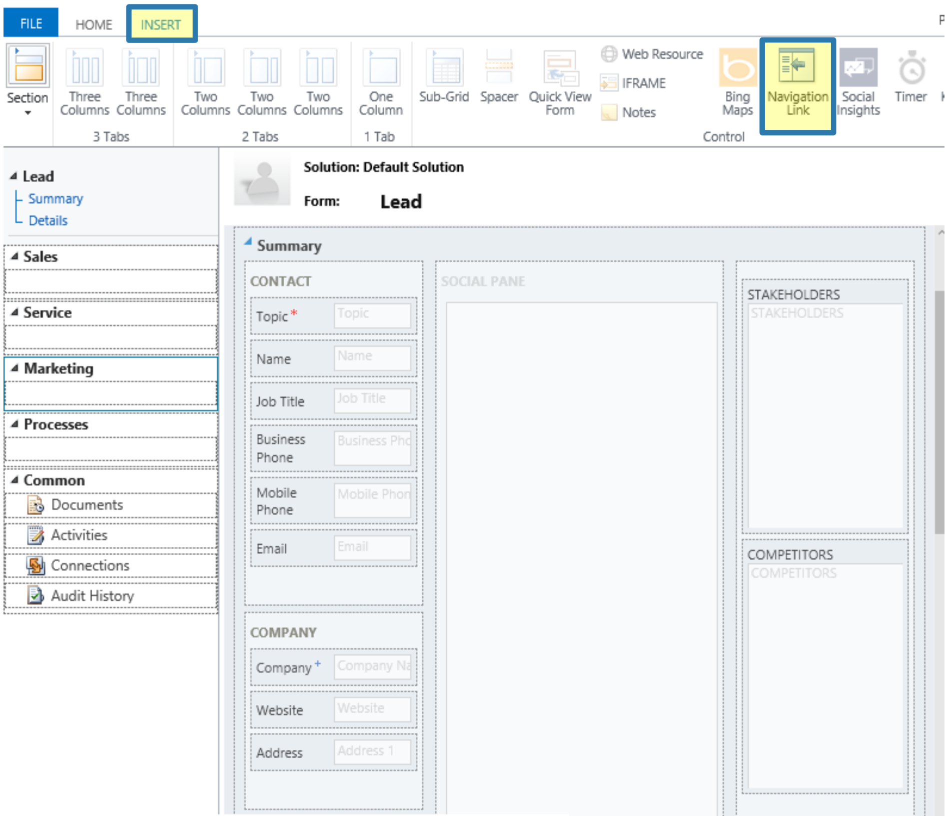


Figure 65: Open [Navigation Link]-button

The following dialog opens. Here you must select a name and an icon for your new label. Please insert *ptm_ActivityTools/MainPage.html* as web resource. Click on the ***[OK]***-button to proceed.

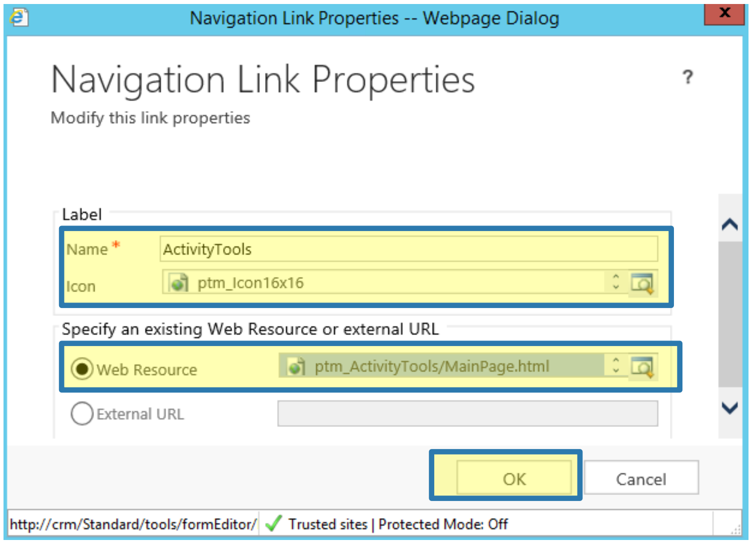


Figure 66: Navigation link properties – Webpage Dialog

To find the perfect icon, click on the *Magnifier* next to the *Icon*-field, scroll down and click on *Look Up More Records*. In the *Look Up Record*-window that opens next search for *ptm_Icon* and choose your preferred size. The icons are available in the three sizes as shown in the figure below:

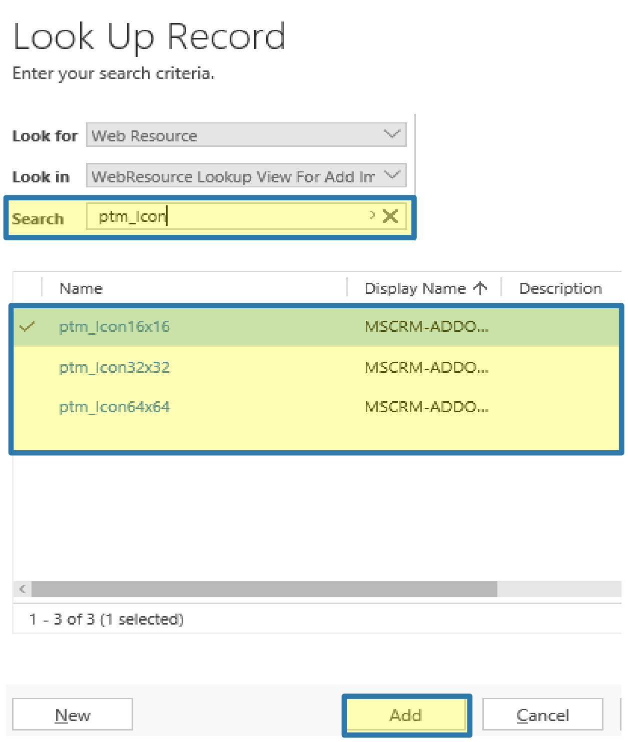


Figure 67: Look up record – Add icons

As shown in the screenshot below the new label has been added. In case you want to switch activity tools from one section to another one (for example, from *Sales* to *Marketing*) you do not have to repeat all the steps. Simply drag and drop the label to its future position in the menu.

Switch back to the *Home*-tab and click on the ***[Save]***-button and thereafter click on the ***[Publish]***-button.

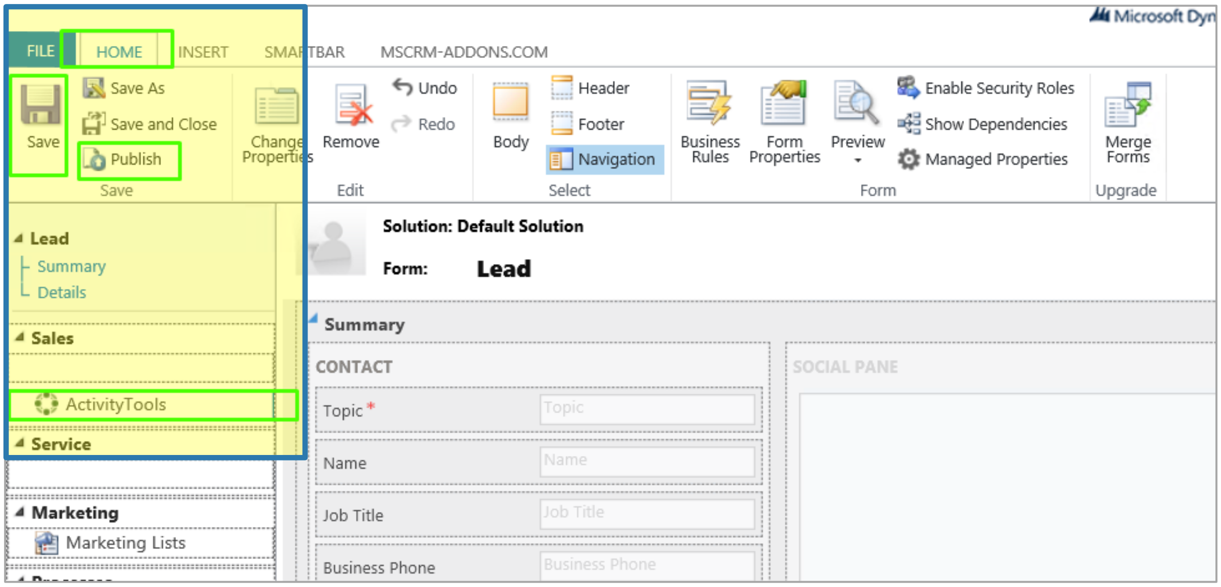


Figure 68: Save and publish settings

Return to your CRM main menu and refresh the page. By clicking on the drop-down button next to the lead in the NavigationBar you open the menu. There, you find the Activity Tools. In our example, you find it in the "Sales"-area.

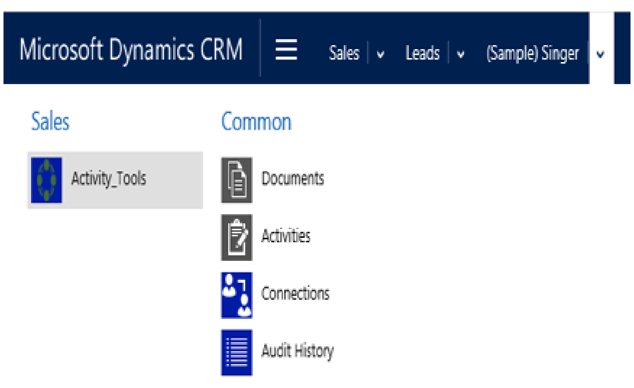


Figure 69: Result - Open ActivityTools

That's it! Simply click on the icon now and the ActivityTools Preview opens.

6.4 Embed ActivityTools in Dashboards – User related preview (MyActivities)

The ActivityTools previews can as well be embedded into a CRM dashboard. Depending on your configuration, it is possible to show one or multiple previews in one dashboard.

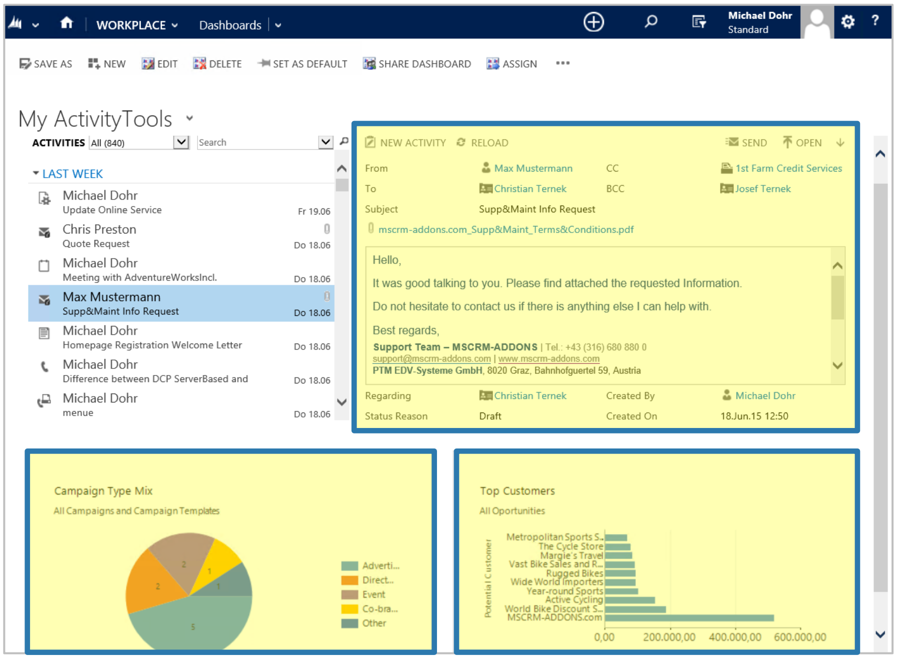


Figure 70: CRM custom dashboard with multiple previews

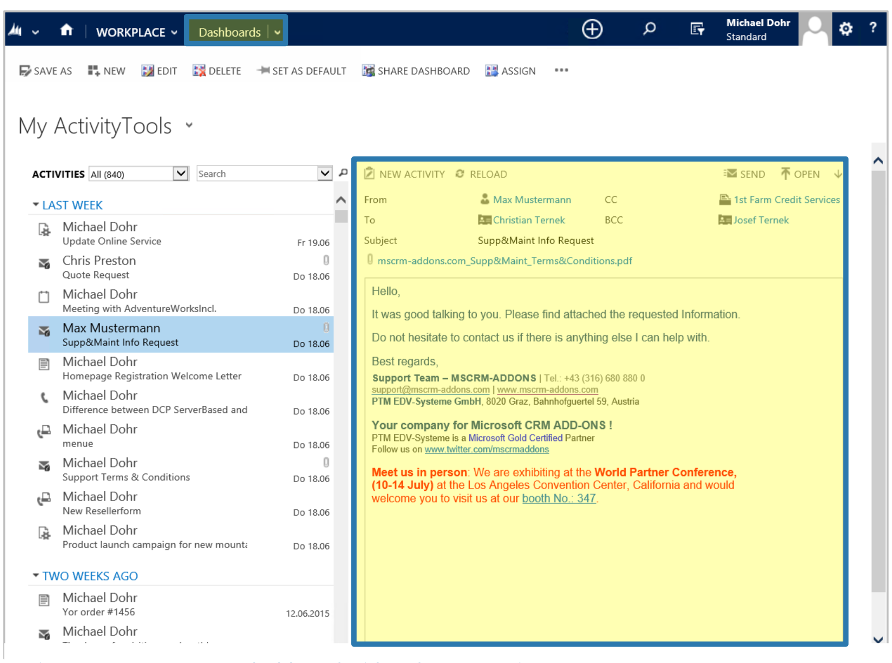


Figure 71: CRM custom dashboard with only one preview

6.4.1 How to embed ActivityTools in Dashboards

ActivityTools for MS Dynamics CRM 2015/2016 and Dynamics 365 can be embedded in any CRM-dashboard. To add Activity Tools to a CRM-Dashboard, please open your CRM-system, navigate to *Sales* and click on *dashboard*. In case you would like to create a new custom dashboard, click on the ***[New]***-button in the command bar. If you want to edit an existing one, select an existing dashboard and click on the ***[Edit]***-button. We will focus on how to create a new *dashboard*.

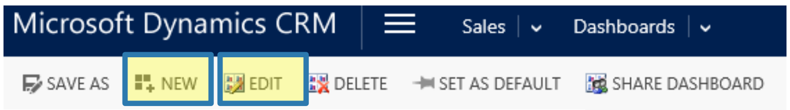


Figure 72: Command bar

Select the layout that suits you most and click on the ***[Create]***-button to continue.

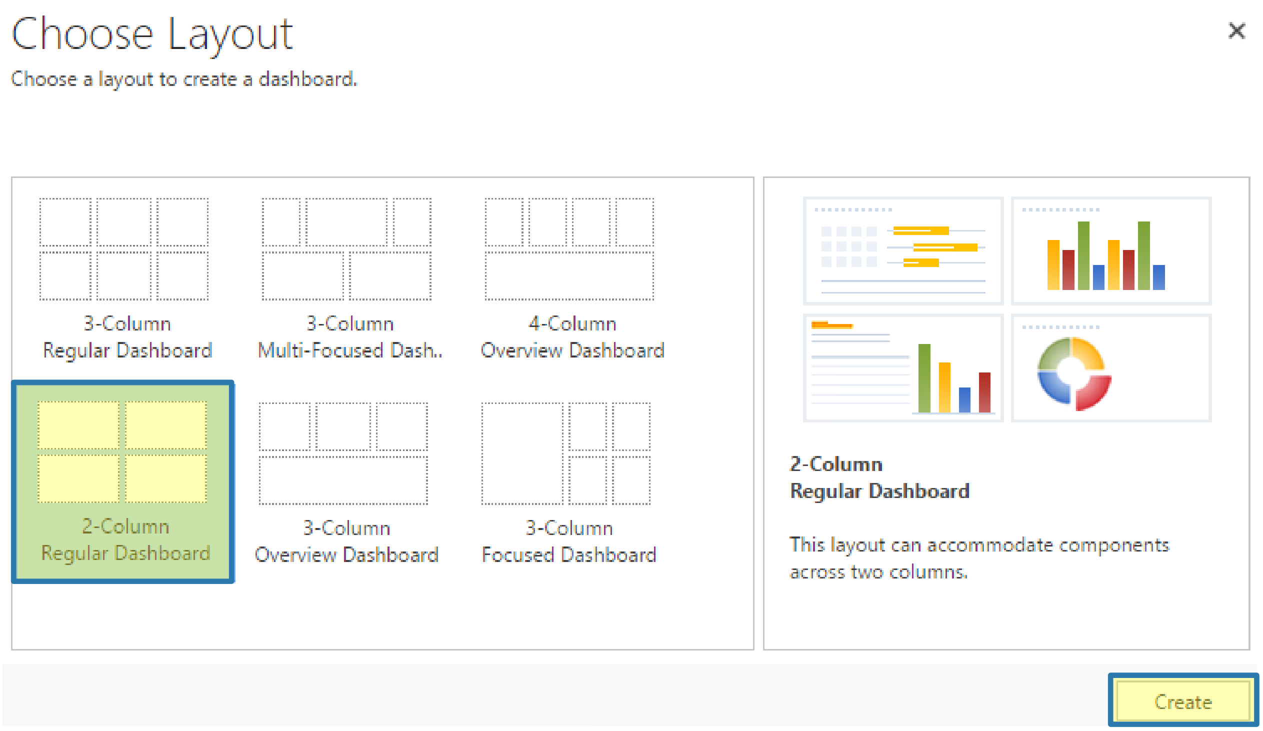


Figure 73: Select new dashboard

Hereafter, click on the ***[Web Resource]***-button in the command bar or on the *web resource icon* in the open grid window.

Figure 74: Web resource icon in open grid

In the Web resource dialog, click on the *Magnifier* next to the *Web resource*-field. Scroll down and click on *Look Up More Records*. Search for *ptm_ActivityTools/MainPage.html* and hit the ***[Add]***-button.

Figure 75: Web resource dialog

Do not forget to select a name for your dashboard-preview, insert it into the Name* field and click on the ***[OK]***-button to add it.

ActivityTools has now been added to the dashboard. To modify the height and width use the scaling buttons in the command bar.

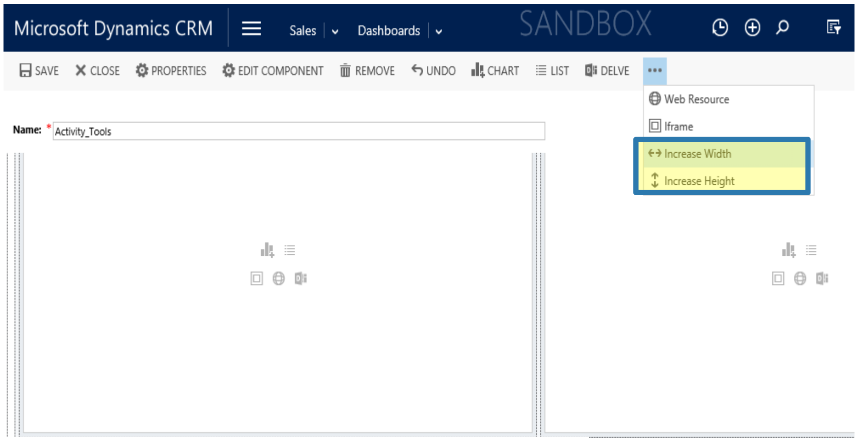


Figure 76: Scaling buttons in the command bar

Specify a dashboard name and do not forget to click the ***[Save]***-button to save your settings.

A possible result could look like the following screenshot:

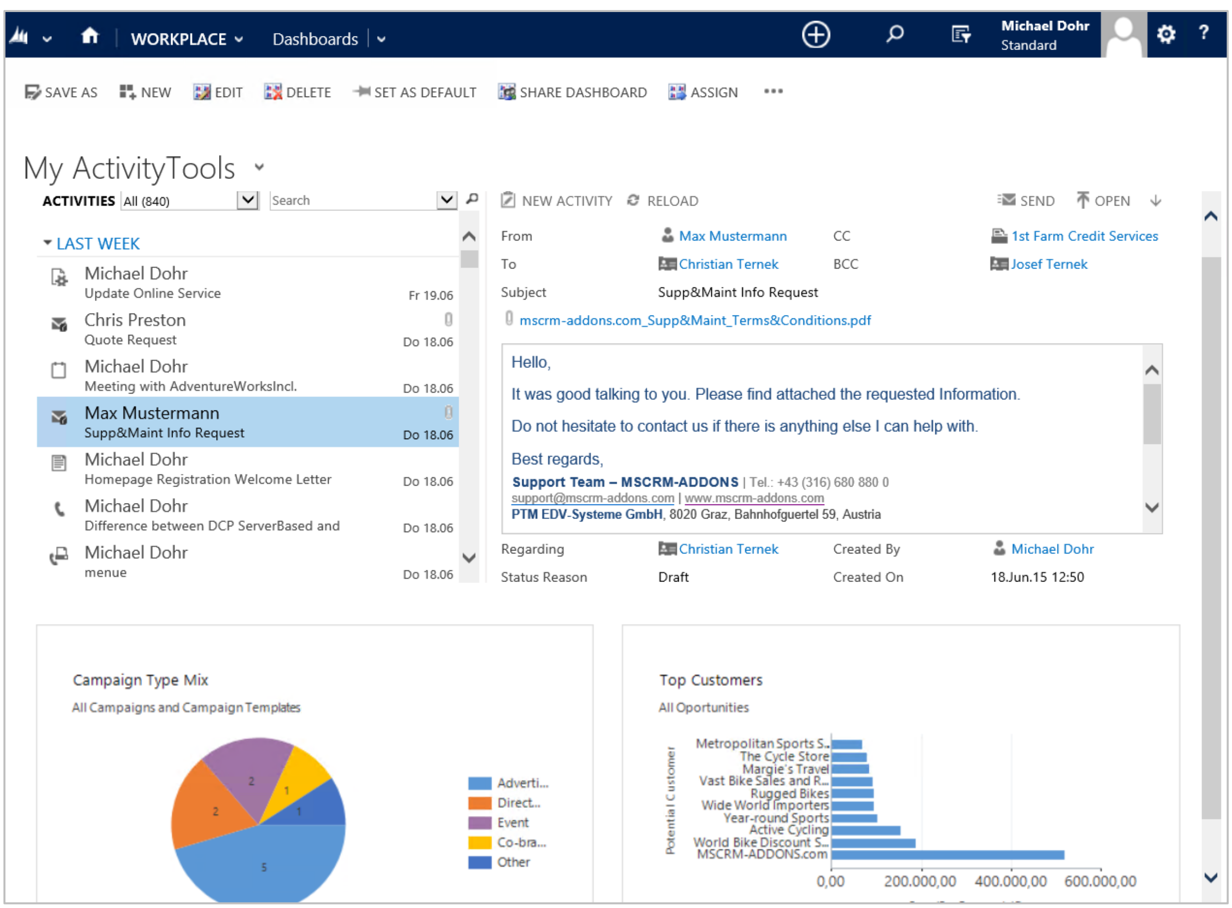


Figure 77: Result – Embedded ActivityTools in dashboards

6.5 Embed *MyActivities* in CRM NavigationBar (SiteMap) – User related preview (My Activities)

The user-related *MyActivities*-view can be embedded anywhere into CRM NavigationBar. This can be achieved via CRM SiteMap by using the XrmToolBox. For free download of the XrmToolBox, please click here.

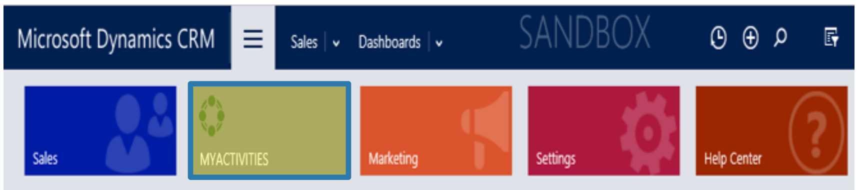


Figure 78: MyActivities in CRM SiteMap

6.5.1 How to embed ActivityTools in the CRM NavigationBar (SiteMap)

The first step towards an embedded ActivityTools-tab in CRM NavigationBar is to extract the XrmToolBox .zip file and run XrmToolBox.exe

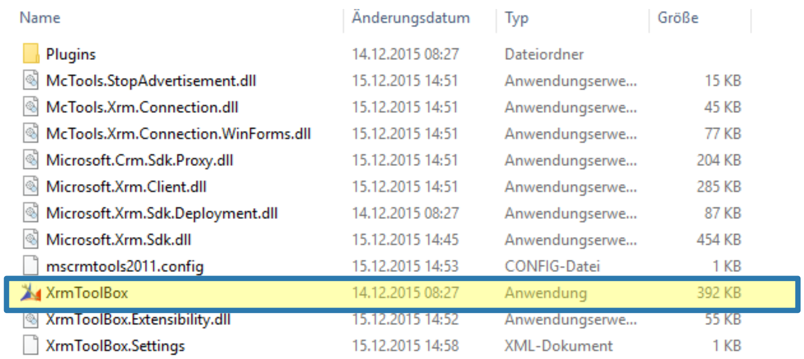


Figure 79: Extraction of XrmToolBox .zip file

In the next window select the *SiteMap Editor* from the list.

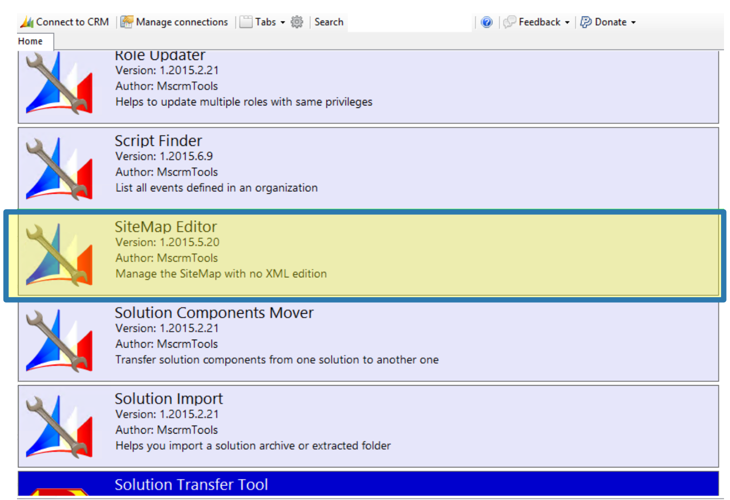


Figure 80: XrmToolBox for Microsoft Dynamics CRM

Click on the [Yes]-button when the following box appears:

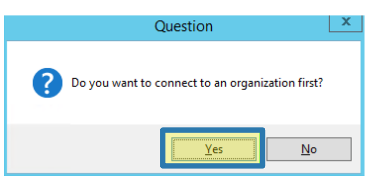


Figure 81: Question dialog

The connection should be displayed in the next window. If there is no connection displayed, please hit the ***[New connection]***-button.

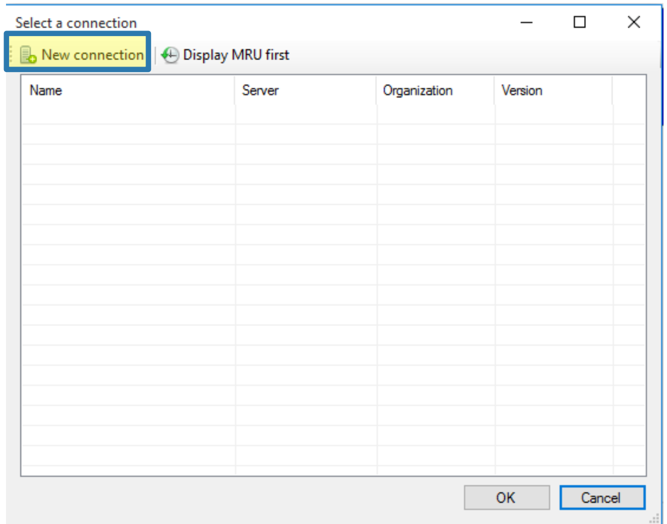


Figure 82: Connection Setup dialog

Please insert the required information to build up a connection to your CRM system in the connection dialog that opens now.

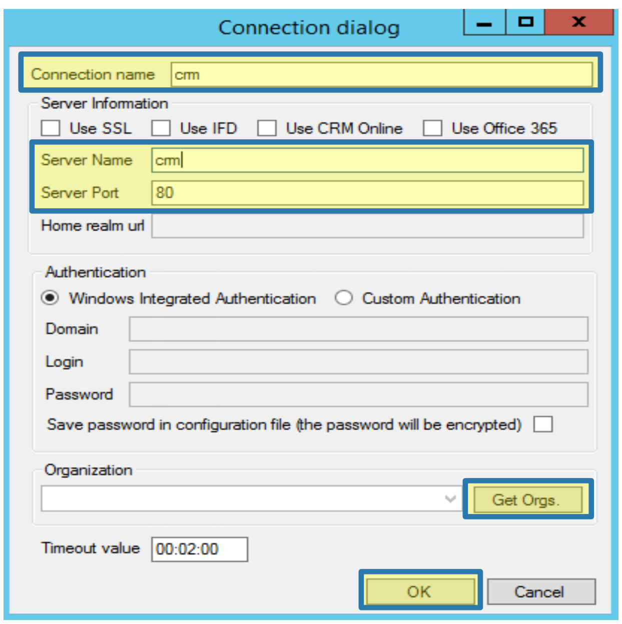


Figure 83: Connection dialog

Once you have entered all important information, click on the ***[Get Orgs.]***-button to retrieve all available organizations and select your preferred one. Then click on the ***[OK]***-button.

As soon as the connection is established, the SiteMap Editor appears. Click on the ***[Load SiteMap]***-button.

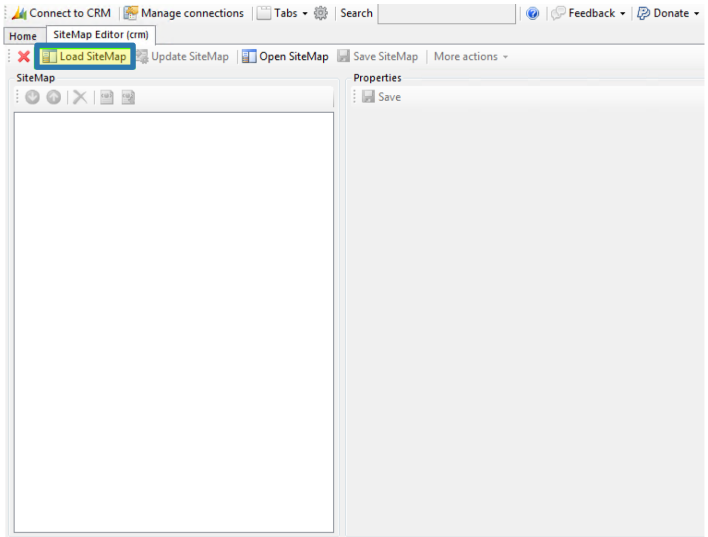


Figure 84: SiteMap Editor (CRM)

Please check an area where you want *MyActivities* to be displayed in the future and click on *Add SubArea*.

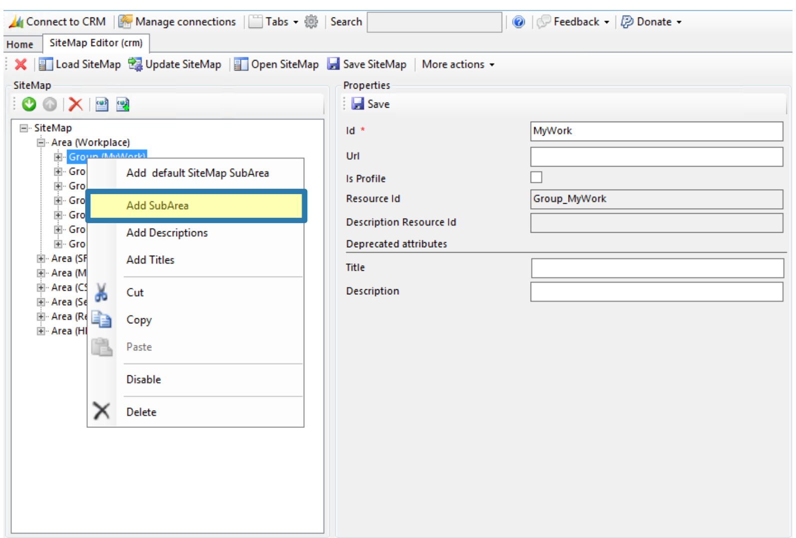


Figure 85: Add SubArea

Your tree-view should look like the one below. You can choose any Site Map Area you want. We decided to add *My activities* to *Group (My Work)*.

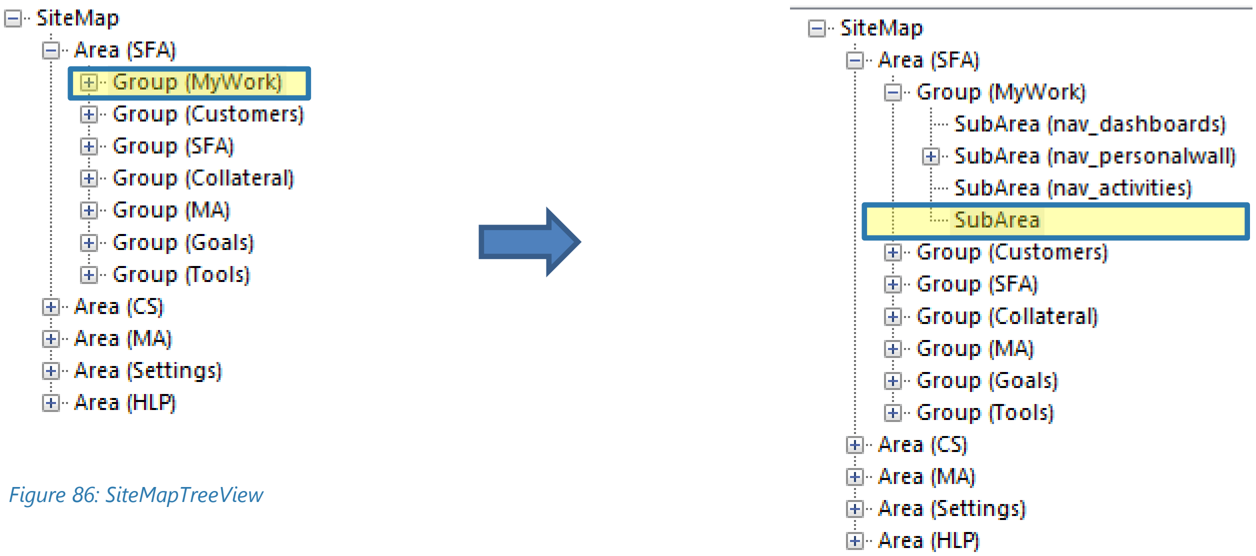


Figure 86: SiteMapTreeView

Please set the following properties for *Icon* and *Url* at the right side and click on the ***[Save]***-button.

- *Icon*: $WebResource:ptm_scheduler_icon_32x32.png
- *Url*: $WebResource:ptm_ActivityTools/MainPage.html

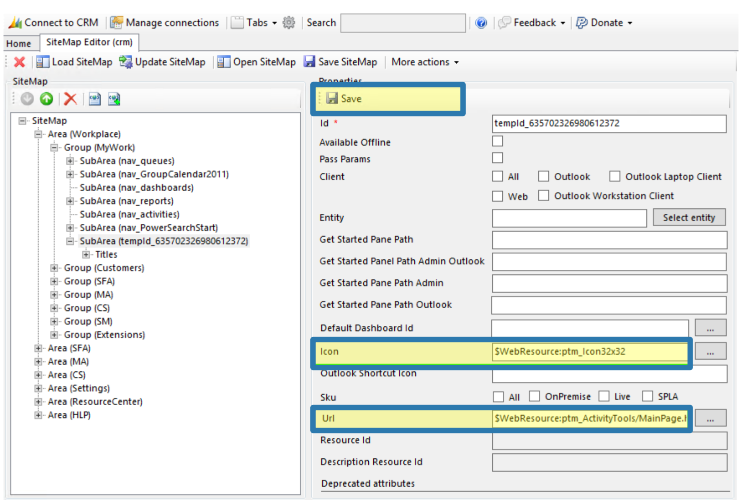


Figure 87: SiteMap Editor – Icon and Url

With a right click on the SubArea that you have created earlier, you open a new window. Click on *Add Titles* in this new window.

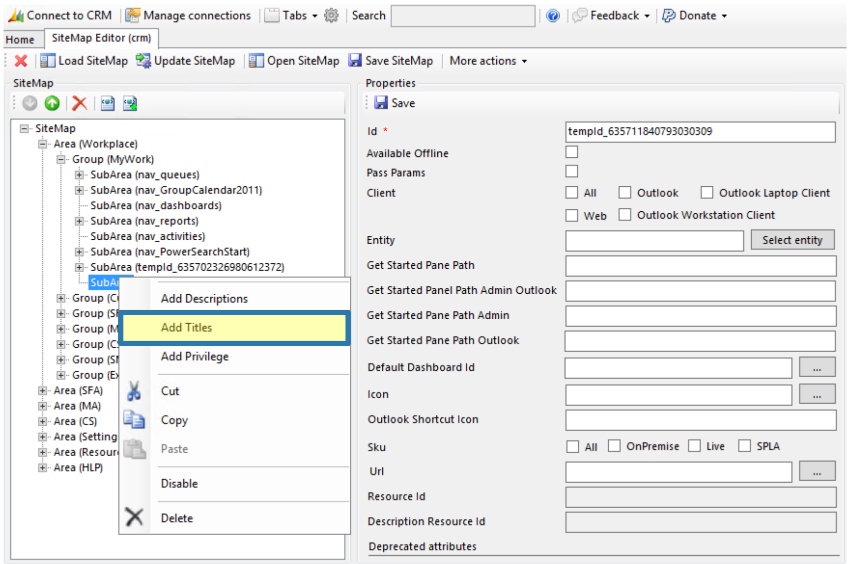


Figure 88: SiteMap Editor – Add Titles

In the following window please enter the appropriate *LCID** (e.g. 1033 for English or 1031 for German)

and *Title** (e.g. MyActivities) and click on the ***[Save]***-button. Afterwards update your sitemap with a click on the ***[Update SiteMap]***-button.

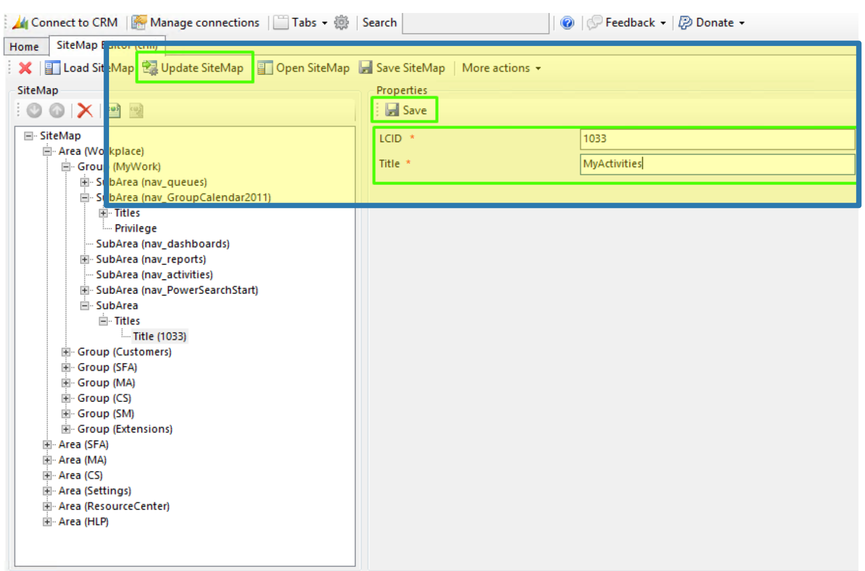


Figure 89: SiteMap Editor – Add Titles to

Now Save your SiteMap configuration, close the window and return to your CRM. Refresh the page. Your NavigationBar should look like this:

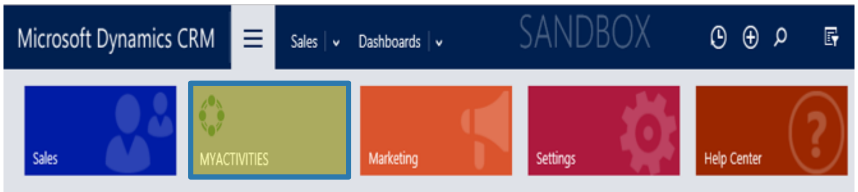


Figure 90: MyActivities in CRM SiteMap

Click on *MyActivites* to get an overview of your activities.

In case your CRM does not look like this, please restart your browser session.

If you have any questions, do not hesitate to contact our support-team. To guarantee quick processing, we kindly ask you to send us an email with an attached screenshot of the issue to support@mscrm-addons.com. Our support team is looking forward to providing you with answers and solutions.

7 How to use Activity Tools Layout Designer

The Layout Designer helps you to create, import, export or edit the preview of your Activity Tools Layout.

The ActivityTools Layout Designer only works with the ActivityTools version 2015.200 or higher.

6.1. How to start the Activity Tools Layout Designer

Open your Settings and then click on *Solutions*.

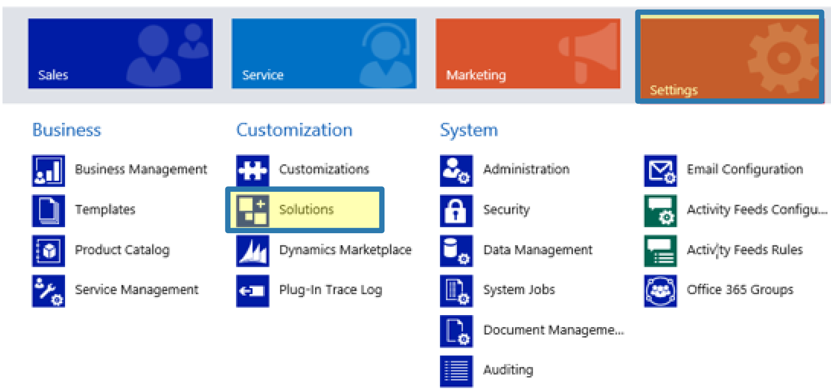


Figure 91: Settings > Solutions

The *All solutions*-window opens. Please double click on *ActivityToolsPluginCore*.

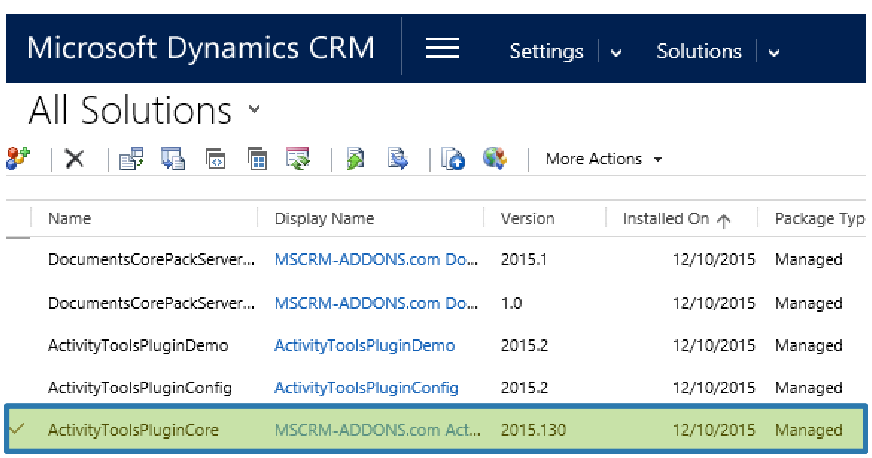


Figure 92: ActivityTools – All Solutions

The *General Settings*-window opens. Click on the ***[Open]-***button in the *Start Layout Designer* line to start the Layout Designer.

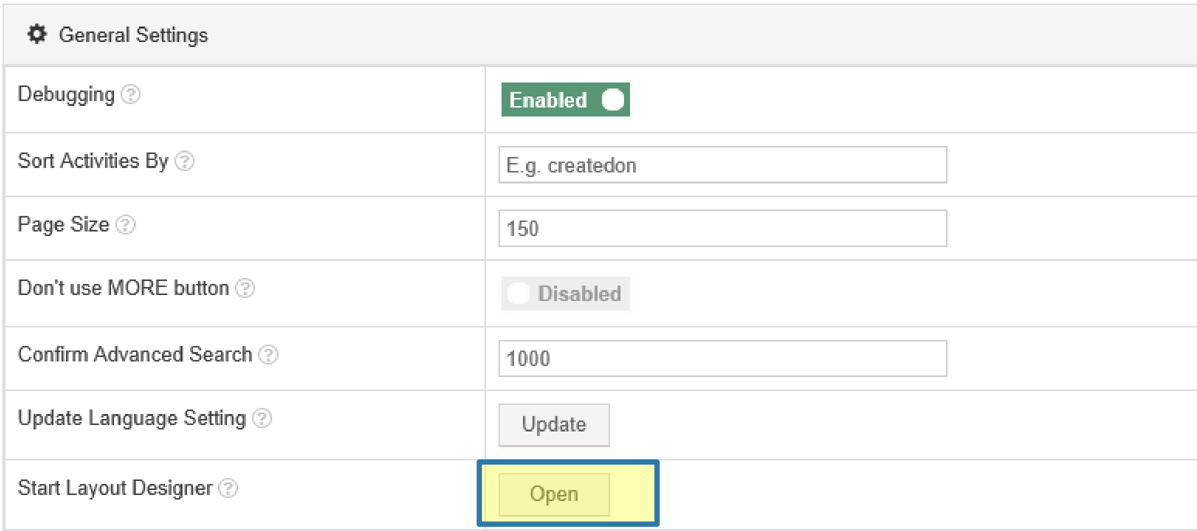


Figure 93: Start Layout Designer

The *Entity Layouts*–dialog opens. The dialog allows you to *create, import, export* or *edit* a layout in ActivityTools. To do so, check the default label and select the action you would like to take. For further information on this topic, have a look at our tutorials, starting with chapter 10.1 HOW TO EDIT/DELETE EXISTING LAYOUT ON PAGE 79.

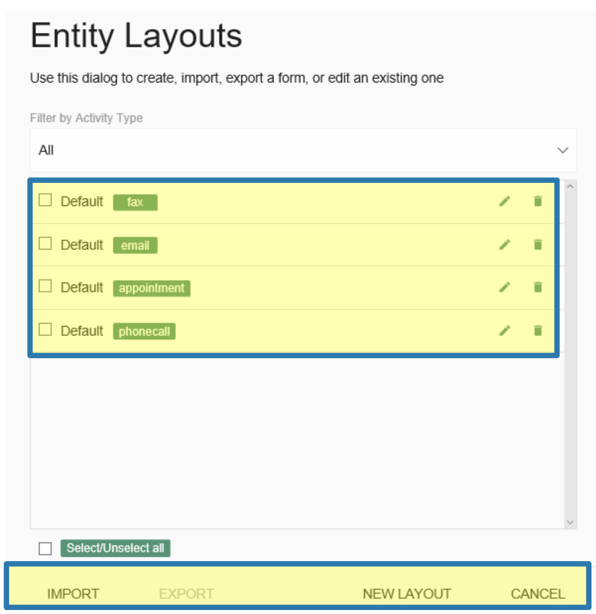


Figure 94: Entity Layouts dialog

7.1 The ActivityTools Layout Designer

Before you add a layout, we want you to have a brief overview of the Layout Designer's customization capabilities.

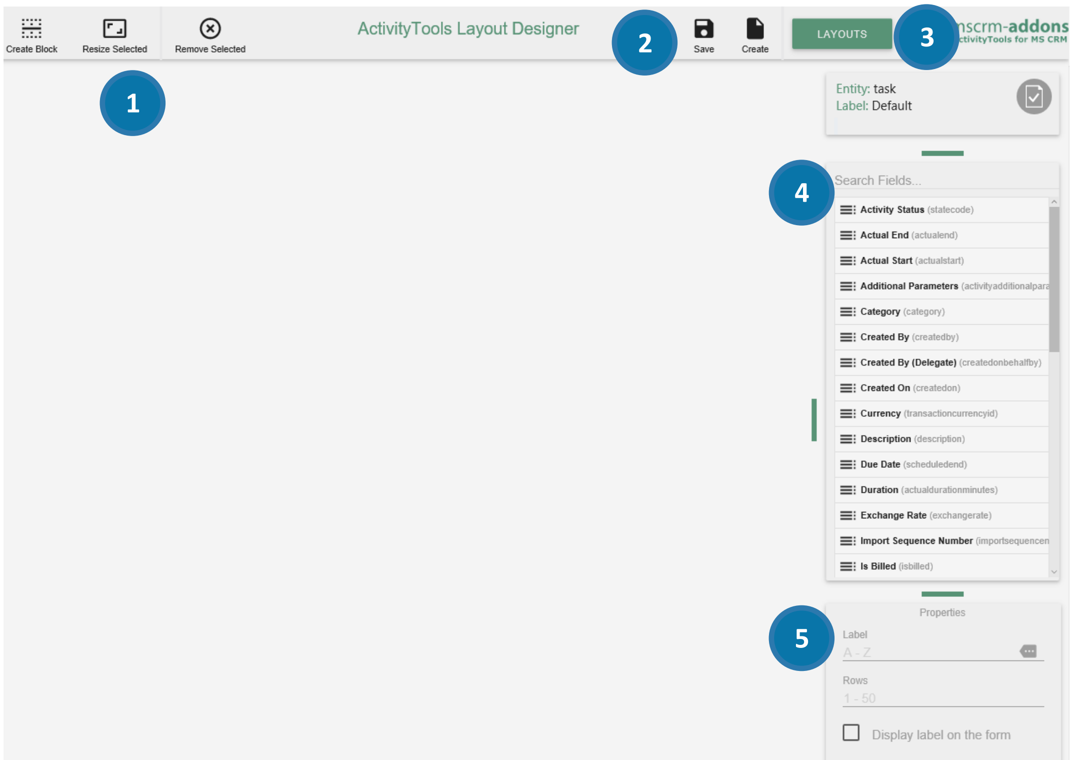


Figure 95: Layout Designer customization

❶ CREATE BLOCK

A layout usually consists of various blocks, which can be split in up to three columns. By customizing these blocks and columns you can create your personal layout, which could look like the example below:

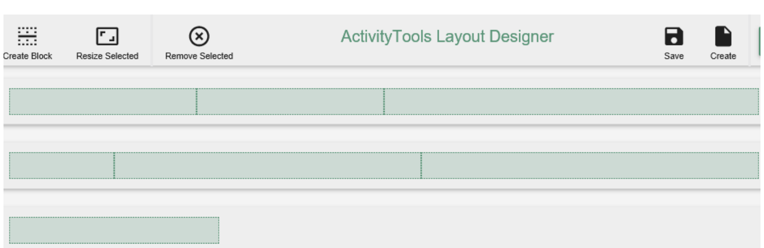


Figure 96: Columns and blocks

To create, resize or remove blocks, columns and fields use the following icons:

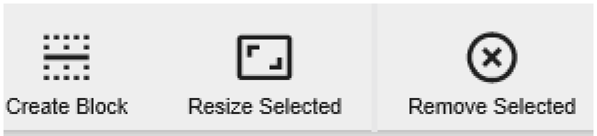


Figure 97: Customize blocks buttons

Click on the ***[Create Block]***-button and a new window opens. You can create your block here by customizing its columns.

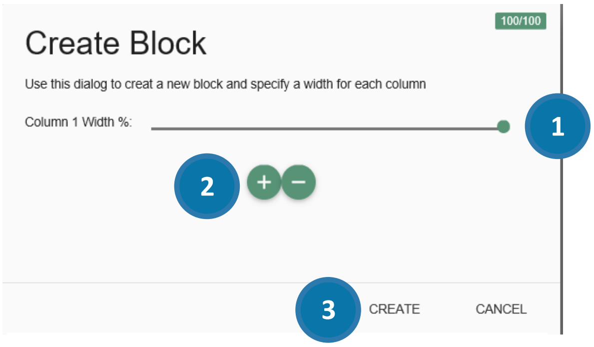


Figure 98: Create block functionalities

1 Move the slider to determine which width you prefer for each column:

2 Add or remove fields

3 Create a block or cancel

The overall percentage maximum for a block is 100 percent!

The field *attachment* in the layout *email* cannot be customized.

The default setting for the field *description* is *0*, which means that it stretches automatically over the whole block.

A possible result of three blocks with one to three fields could look like this:

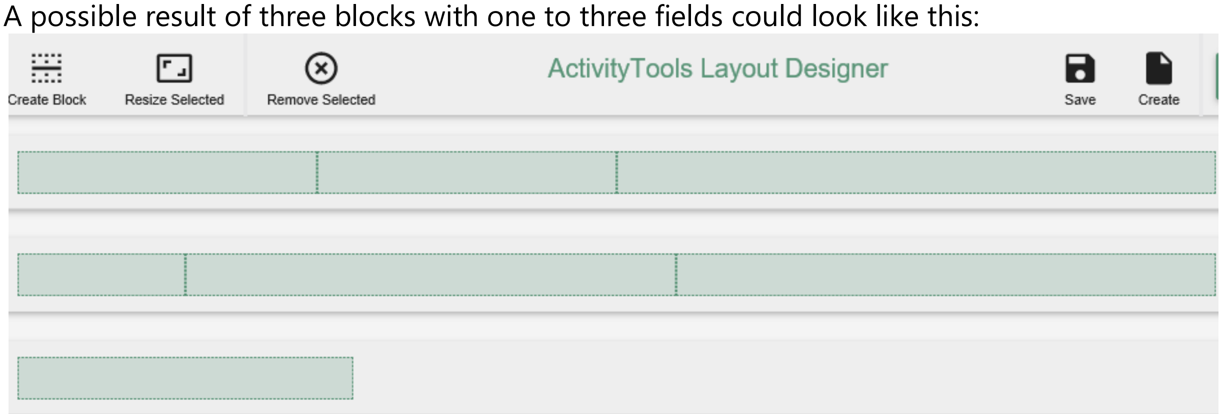


Figure 99: Blocks: Result

❷ The [Save]- & The [Create]-Button

Make sure that you save your changes as soon as possible with a click on the ***[Save]***-button in the right upper corner.

The ***[Create]***-button in the right upper corner is a quick way to get to the *New Layout dialog*. The dialog supports you when it comes to the creation of new buttons.

❸ The [Layouts]-button

The green ***[Layouts]***-button in the right upper corner opens the *Entity Layouts Dialog*, while the *Entity* and *Label* overview shows you which entity you are working on at the moment.

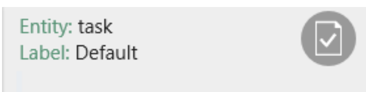


Figure 100: Entity and Label Overview

❹ The Search Fields

In the *Search Fields*-section you can choose which fields you want to add to which column. Simply drag and drop your preferred field from the *Search Fields*-section to the column you would like to place it.

❺ The ActivityTools Layout Designer Properties

In the Properties of the ActivityTools Layout Designer, you can edit your field labels in any activated CRM language. Learn how to do so in our tutorial in chapter 10.3 How to on page 82.

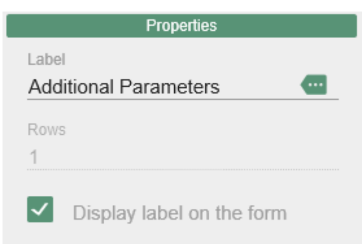


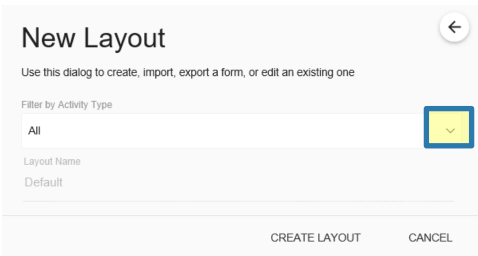
Figure 101: ActivityTools Layout Designer Properties

7.2 How to add new Layouts

The ActivityTools Layout Designer can provide you with new layouts. Learn how to add new layouts in the course of this chapter.

7.2.1 Open the Entity Layouts dialog

Now click on the ***[New Layout]***-button on the bottom of the dialog. A new window opens. One click on the downward arrow will open a drop-down menu.



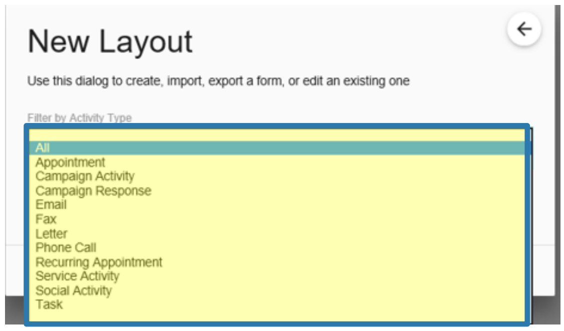


Figure 102: New layout dialog – drop-down menu

In this menu, you can choose which new layout you would like to add to the default ones.

If a layout is already set, the program will not allow to add it again.

You cannot add any self-created layouts, because they are imported from the default settings in CRM.

When you have selected a layout, click on the ***[Create Layout]***-button to add this new layout to the default ones. In our example, we decided to go for the activity type *task*:

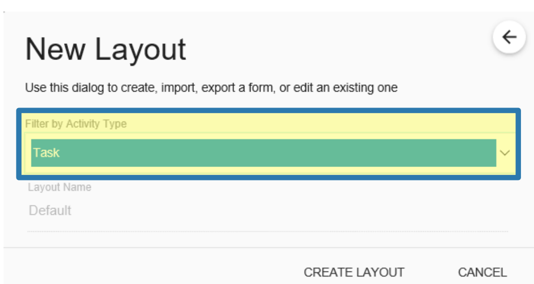


Figure 103: Create new layout

As soon as you click on the ***[Create Layout]***-button, you are redirected to the ActivityTools Layout Designer surface, where you can customize your new layout.

8 How to activate debugging for ActivityTools

To activate debugging for ActivityTools open CRM and navigate to *Settings* > *Solutions*

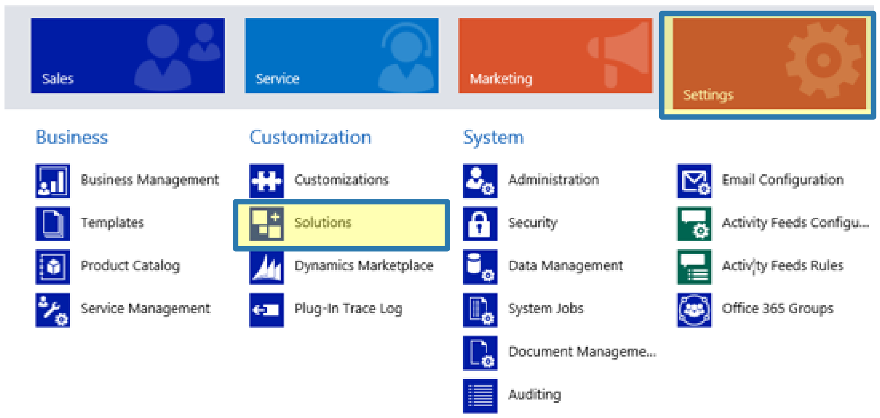


Figure 104: Navigate to Settings > Solutions

In the *All Solutions* overview, search for *ActivityToolsPluginCore* and open the solution with a double-click on it. If the solution is not displayed in the window, you can search for it by using the *Search*-function on the right side of the screen.

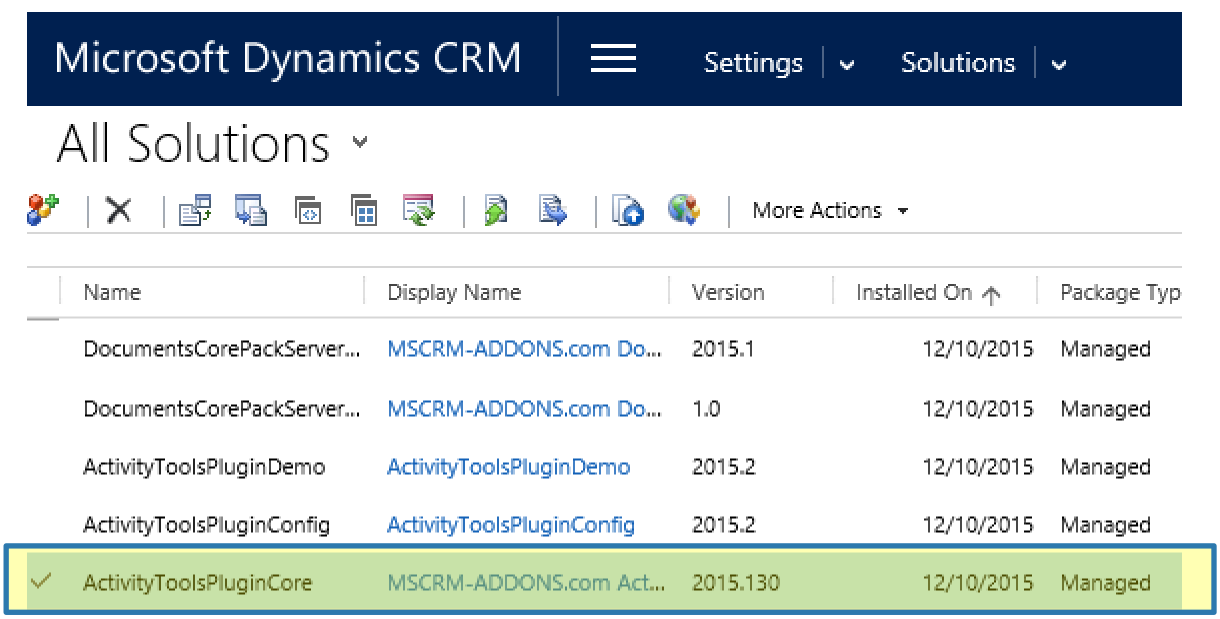


Figure 105: All solutions overview

With a double click on *ActivityToolsPluginCore* you will open the ActivityTools Settings.

Select the *General Settings*-tab and enable debugging by clicking on the ***[Disabled]***-button.

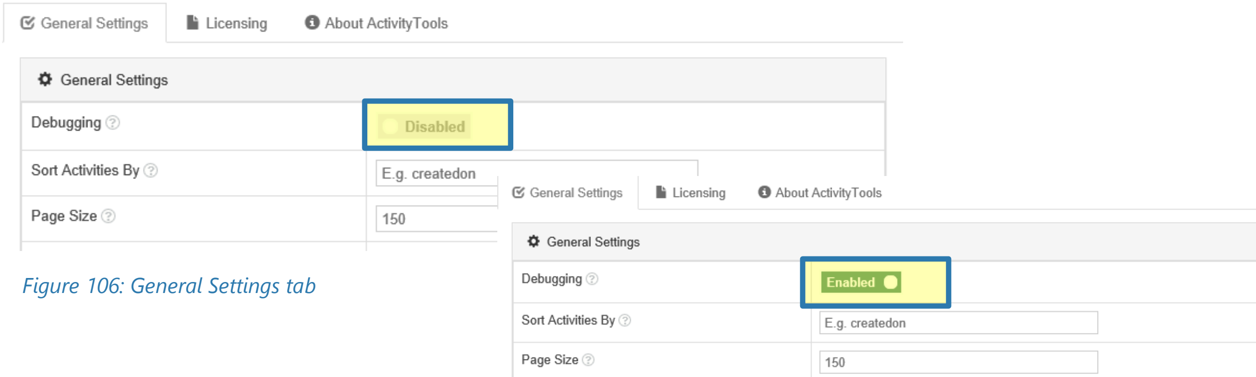


Figure 106: General Settings tab

As soon as Debugging is enabled, press click on the [Save Configuration]-button.

The next step consists of getting access to the log files. The log files are stored in the

MSCRM-ADDONS.com Debug-entity. The easiest way to access it, is by using the *Advanced Find* in the NavigationBar. Click on the ***[Advanced Find]***-button in order to open the *Advanced Find*.

Figure 107: Advanced Find

Now select the *MSCRM-ADDONS.com Debug* entity and include the following condition: *Name must Contains PTMActivityTools*. Then click on the ***[Edit Columns]***-button.

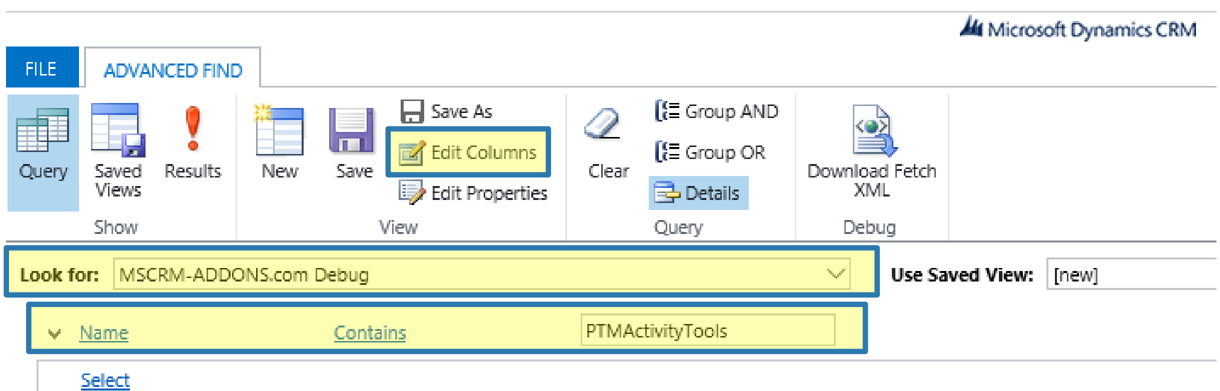


Figure 108: MSCRM-ADDONS.com Debug

The following window opens:

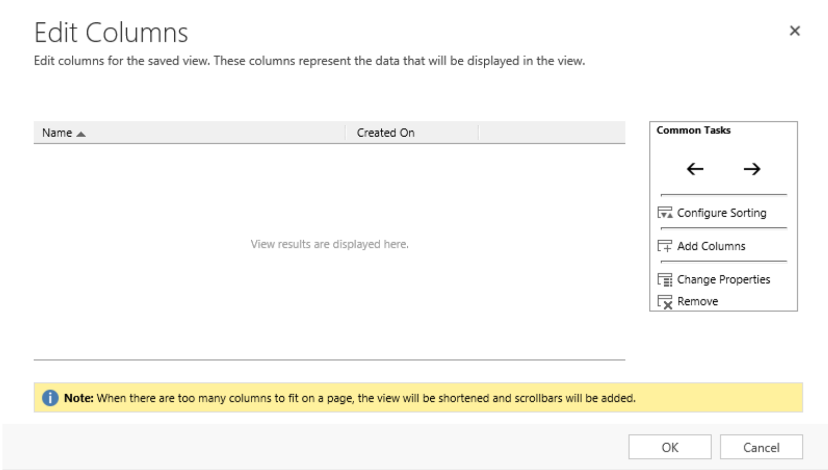


Figure 109: MSCRM-ADDONS.com Debug: Edit columns

Click on the ***[Add Columns]***-button. Next, check the *ptm_message*-field and click on the ***[OK]***-button to continue.

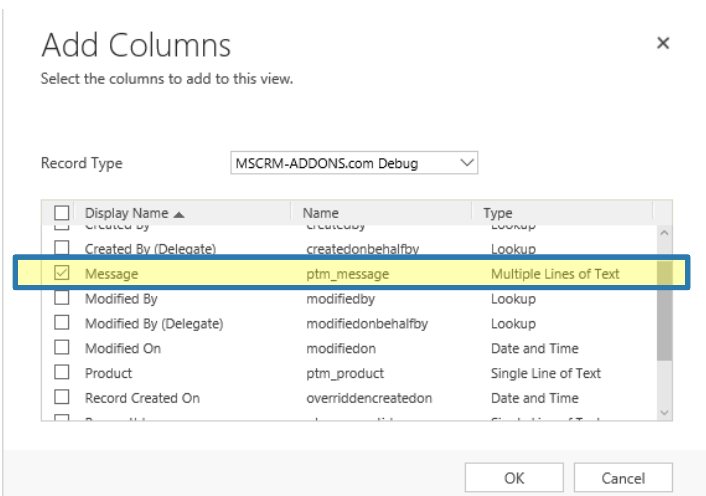


Figure 110: MSCRM-ADDONS.com Debug: Add columns

The column *Message* has been added:

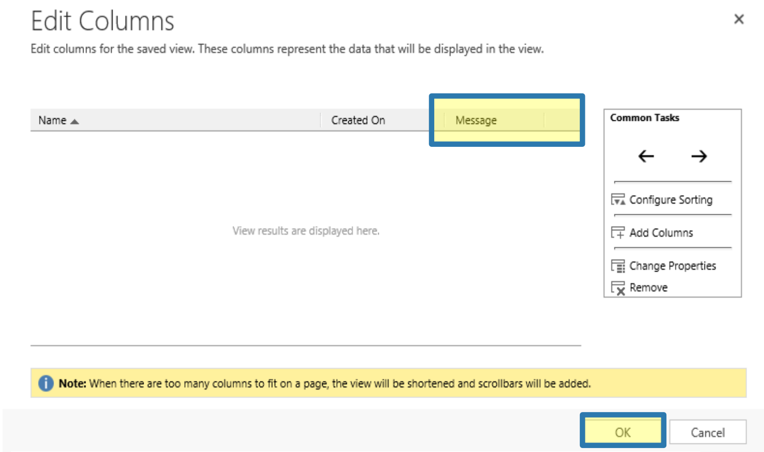


Figure 111: MSCRM-ADDONS.com Debug: Message-field added

Click on the ***[OK]***-button in order to return to the main menu. Next, click on the ***[Results]***-button.

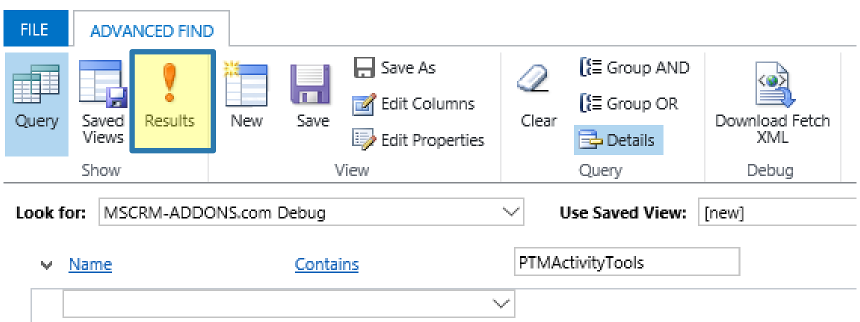


Figure 112: Advanced Find – Retrieve Results

The next step consists of deleting all the retrieved debug records. To ensure that you only have the latest and most relevant log files, you can filter the debug file by the *Created On*-field. Then reproduce the error and refresh the result list of this Advanced Find.

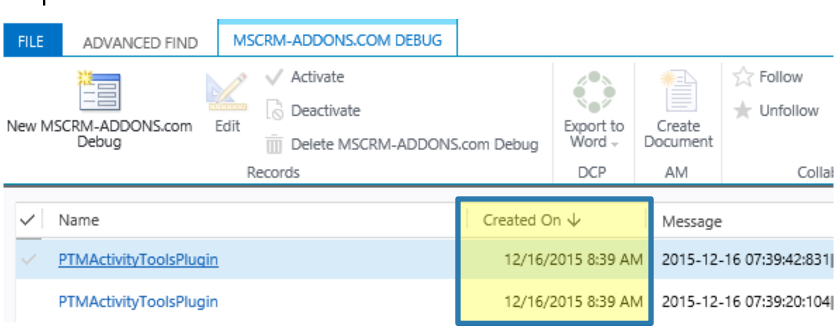


Figure 113: Advanced Find – Results filtered by Created On-field

Now select all relevant records and open the drop-down menu next to the ***[Export MSCRM-ADDONS.com Debug]***-button in the Command bar.

Figure 114: [Export MSCRM-ADDONS.com Debug]-button

Click on *Static Worksheet (Page only)*.

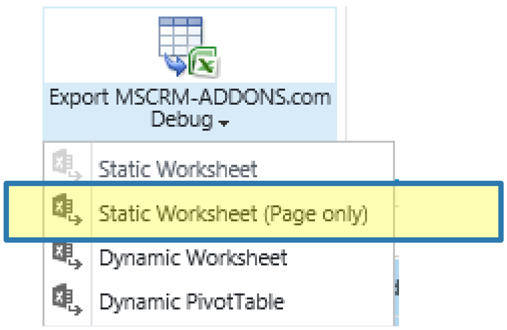


Figure 115: Static Worksheet (Page only)

Please save the log files on your computer. To guarantee quick processing, we kindly ask you to send us an email with a short error description and the attached log-files to support@mscrm-addons.com. Our support team is looking forward to providing you with answers and solutions.

9 How to uninstall ActivityTools

Sometimes it can be necessary to uninstall ActivityTools. To do so, please select *Programs and Features* in the Control Panel.

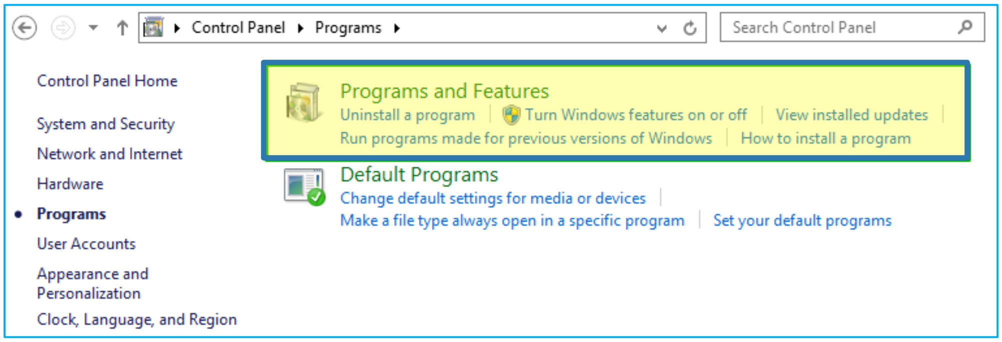


Figure 116: Programs and Features

Now search for *ActivityTools for MS CRM 2015/2016* in the *Uninstall or change a program* section to uninstall ActivityTools. Follow the instructions to uninstall the add-on as shown below:

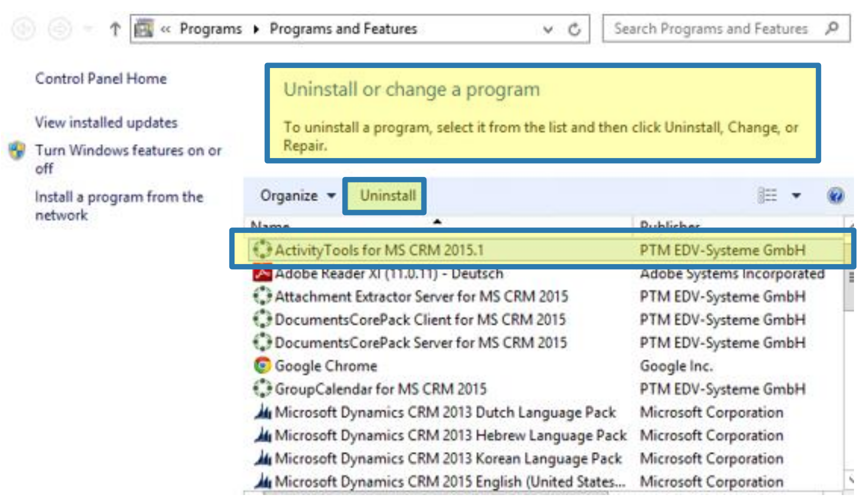


Figure 117: Uninstall or change a program

In the next dialog, click on the ***[Yes]***-button to uninstall ActivityTools for MS CRM.

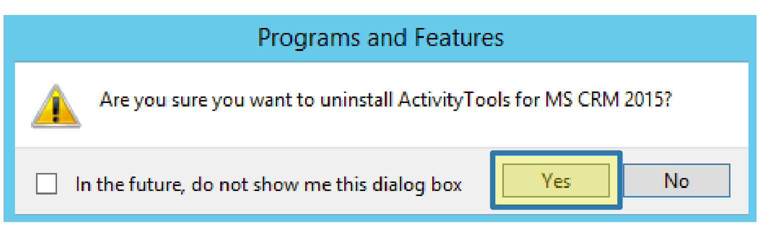


Figure 118: Uninstall or change a program

10 Tutorials (“How To’s”)

This chapter provides you with helpful tutorials that show you how to work with ActivityTools efficiently.

10.1 How to edit/delete existing layouts

To edit an existing form, open the ActivityTools entity layouts window.

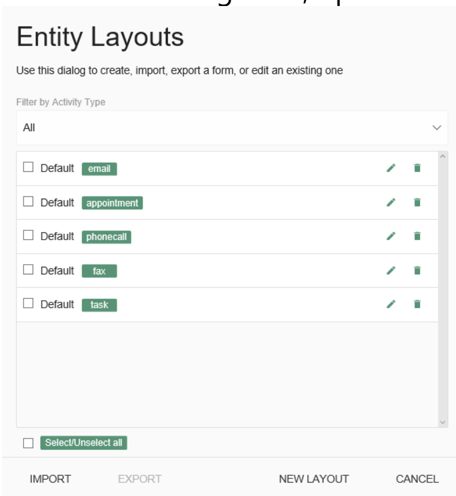


Figure 119: Entity Layout window

Next to the different layouts you find two buttons:

Figure 120: Pencil & garbage bin - button

Click on the ***[Pencil]***-button to edit a certain layout and on the ***[Garbage bin]***-button to delete a layout.

10.2 How to customize fields

Preview fields can be added or deleted to customize your personal search.

10.2.1 How to add fields

For our example, we have already placed *Additional Parameters*, *Actual End*, *Currency*, *Import Sequence No* and *Due Date* by dragging and dropping the fields into the ActivityTools Layout Designer.

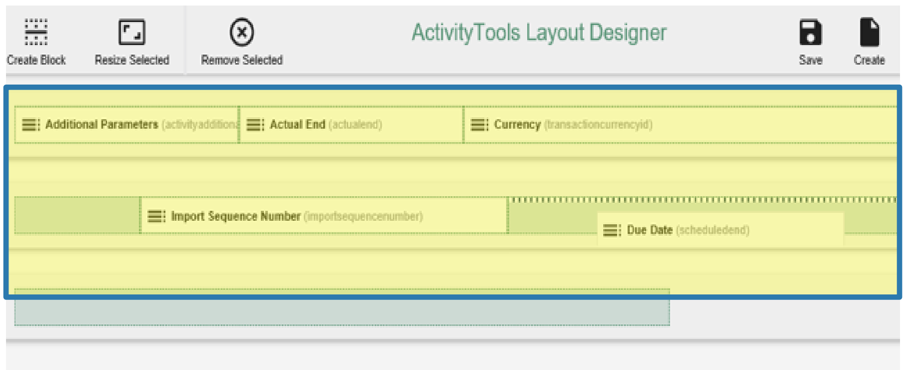


Figure 121: ActivityTools Layout Designer – drag & drop fields

As soon as we have added all necessary fields, we click on the ***[Save]***-button. When we open our ActivityTools Preview window it looks like this:

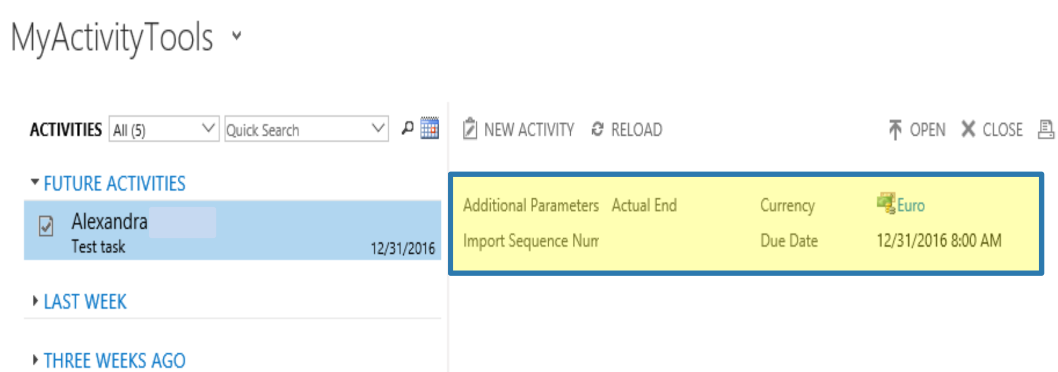


Figure 122: ActivityTools Preview with fields

All the fields we added to the columns are displayed in the ActivityTools preview. The look of your preview depends on which fields you have added and how you have customized them.

10.2.2 How to remove fields

Fields cannot only be added; they can also be removed.

To remove a field, select the field (1) and simply click on the ***[Remove selected]***-button (2). Then press the ***[Save]***-button (3). For demonstrating purposes, we remove the field *Due Date*.

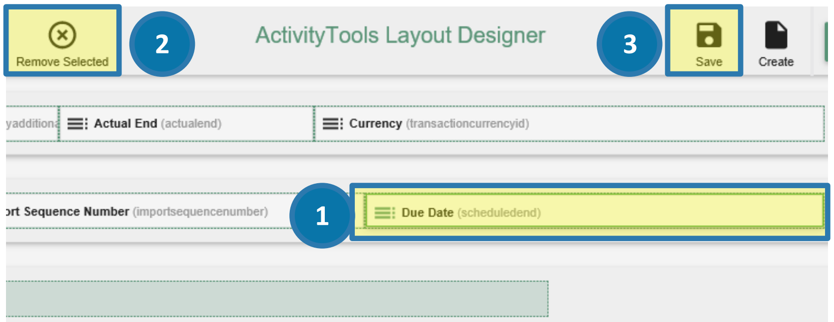


Figure 123: Remove preview field Due Date

Successfully removed, the field can be found in the *Search field*-section again.

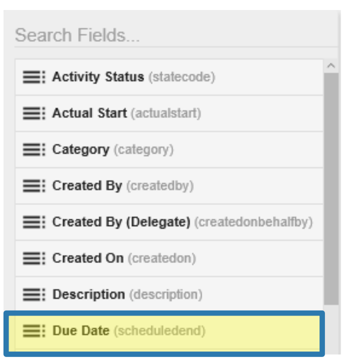


Figure 124: Search fields with Due Date-field

The field *Due date* is now also removed from the Activity Tools Preview.

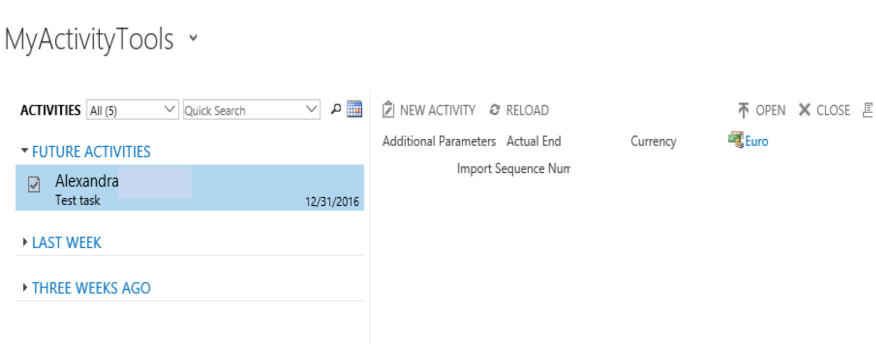


Figure 125: ActivityTools Preview with fields (excluding the field Due Date)

10.3 How to change the field language

Especially when you work in a multilingual team, it can be helpful to change the language of fields.

To do so, click on the green ***[More]***-button next to the label.

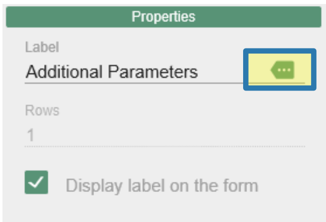


Figure 126: ActivityTools Layout Designer properties

The field labels window opens. As you can see, all available languages are listed in this overview.

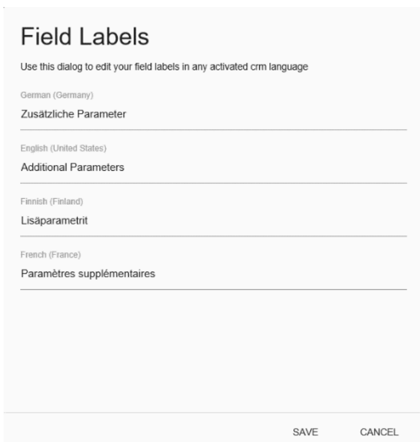


Figure 127: Field labels window

Click in the field you would like to rename (the language is highlighted in green now) and overwrite the existing term. Do not forget to press the ***[Save]***-button to proceed properly.

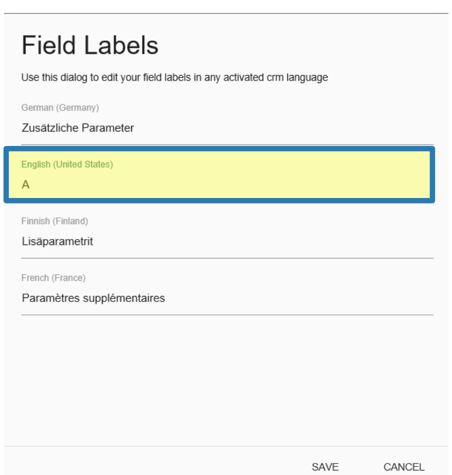


Figure 128: Field labels window: overwrite term

You can only change a field language if the language is also activated in your CRM settings. Besides, even though the fields were renamed, they keep their original functions!

Though the field name has changed, the original name of the field will be still displayed in brackets:

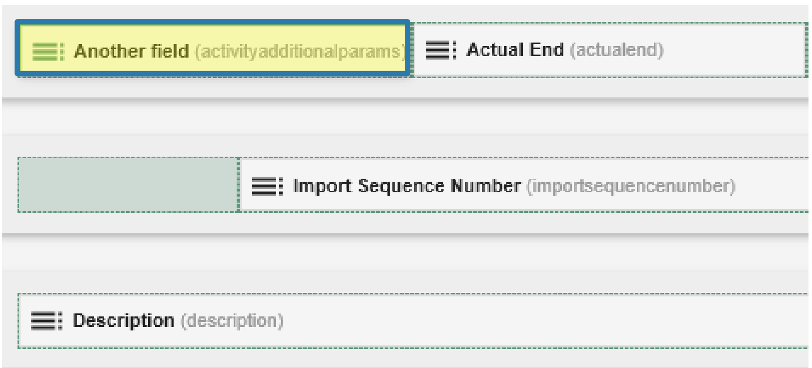


Figure 129: Field with changed name

The ActivityTools preview looks as well different now. As you can see, the field *Additional Parameters* has been renamed to *Another field*. If the field does not different, please refresh your browser with F5.

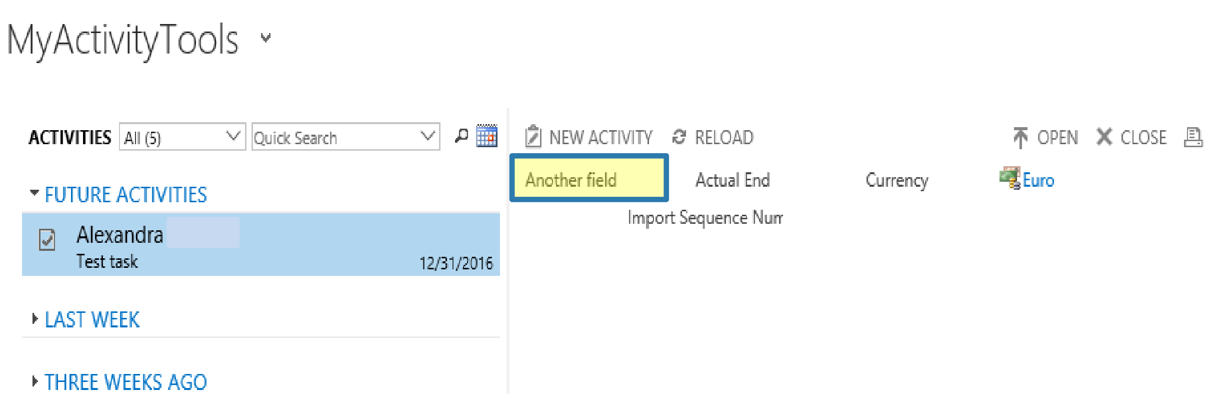


Figure 130: ActivityTools Preview with renamed field

10.4 How to export a Layout

If you want to export a layout to another system (for example from a test environment to a live environment) or in order to create a Backup file, you can export your layouts to .xml files.

In order to export a layout, please check the one you would like to export in the *Entity Layouts*-dialog (1) and press the ***[Export]***-button (2). For demonstrating purposes, we export the default layout *Task*.

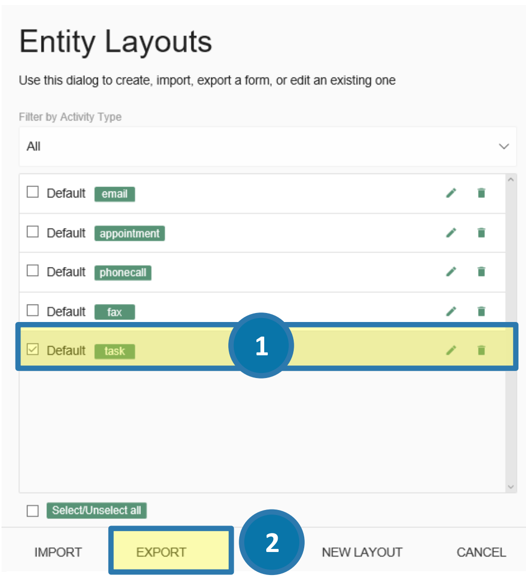


Figure 131: ActivityTools Preview with renamed field

Please save the so created file in a save location you remember. You might want to reimport it later again.

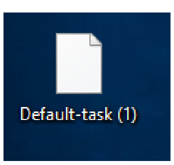


Figure 132: Default-task save location

10.5 How to import a Layout

Also, the import from, e.g. a Backup file, is very easy.

In order to import a file, please click on the ***[Import]***-button in the *Entity Layouts*-dialog. A new window appears. Click on the ***[Files]***-button and import the .xml-file (the layout) you would like to import:

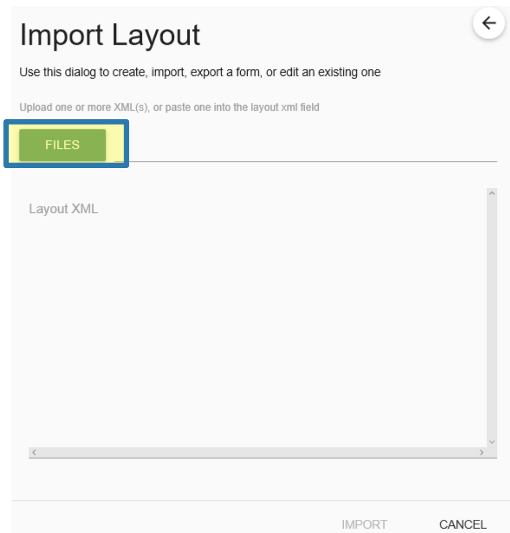


Figure 133: Import Layout

You are now provided with the XML Layout of the file you want to import. Click on the ***[Import]***-button. If you import only a single layout, it will be opened immediately in the ActivityTools Layout Designer.

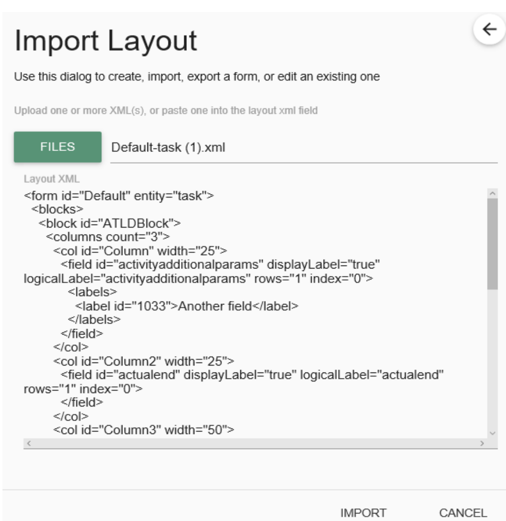


Figure 134: Import Layout .xml-file

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For further technical questions, please visit our blog http://www.mscrm-addons.com/Blog

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For sales and licensing questions please contact office@mscrm-addons.com, or the corresponding contact information below.

Headquarter – Europe

PTM EDV-Systeme GmbH

Bahnhofgürtel 59

A-8020 Graz

Austria

Tel Austria +43 316 680-880-0

Fax +43 316 680-880-25

Support:

7AM - 8PM GMT+1 (Monday-Friday)

Sales:

+43 316 680 880 14

sales@mscrm-addons.com

www.ptm-edv.at

www.mscrm-addons.com

Headquarter – US

mscrm-addons.com Corp

1860 North Rock Springs Rd

Atlanta, GA 30324

United States

Tel US +1 404 720 6066

Support:

9AM - 6PM EST (Monday-Friday)

Sales:

+1 404 720 6046

ussales@mscrm-addons.com

www.mscrm-addons.com