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ActivityTools – Installation and User Guide for Microsoft Dynamics 365

June 2023

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Preamble

This documentation is intended to guide you through the installation and usage of ActivityTools for Microsoft Dynamics 365.

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 a Microsoft 365 Server

Supported Web Browsers and versions

Supported Web Browsers and Versions:

- Firefox
- Chrome
- Edge

One of the following editions of Microsoft Dynamics 365 must be available:

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

Please note:

- If you use ActivityTools 2015.200 or a higher version, you can upgrade from Microsoft Dynamics CRM 2015 to 2016 directly by deploying the updated version.
- If you use an older version, please find a short instruction about the upgrade of our addons to the latest version of Microsoft Dynamics 365, [here](#).

Any one of the following operating systems is required:

- Windows 11
- 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 and higher

Purpose of ActivityTools?

ActivityTools offers a range of functionalities, including efficient activity management, and brings a familiar Outlook-style experience to Dynamics 365.

Creating email signatures, whether tailored to individual Dynamics 365 users or establishing a default signature for all users, is an effortless task with ActivityTools. The tool seamlessly integrates HTML for signature design, enabling the incorporation of links, images, and various font styles and colors.

Beyond its email features, ActivityTools comes equipped with powerful search and filtering capabilities, direct attachment access, on-demand loading for optimized performance, and a form designer that empowers users to extensively customize the ActivityTools layout to suit their preferences.

1. How to install ActivityTools for Microsoft Dynamics 365

ActivityTools is very easy to install and integrate into Microsoft Dynamics 365. There are different ways how to install ActivityTools in your environment.

1.1. How to install ActivityTools via AppSource

By leveraging Microsoft AppSource, businesses can find, and implement our applications like [ActivityTools](#) that align with their requirements and help them streamline processes.

After accessing the app on AppSource, check the compatibility and requirements of your Microsoft software, sign into your Microsoft account, and install the app by clicking Free Trial. Make sure you select the environment you want to install ActivityTools in case you have different environments.

Follow any on-screen instructions or prompts to complete the installation process. You may be asked to grant certain permissions or provide additional information during the installation.

Once the app is successfully installed, you should receive a confirmation message or notification. The app should now be accessible within the chosen Dynamics 365 environment.

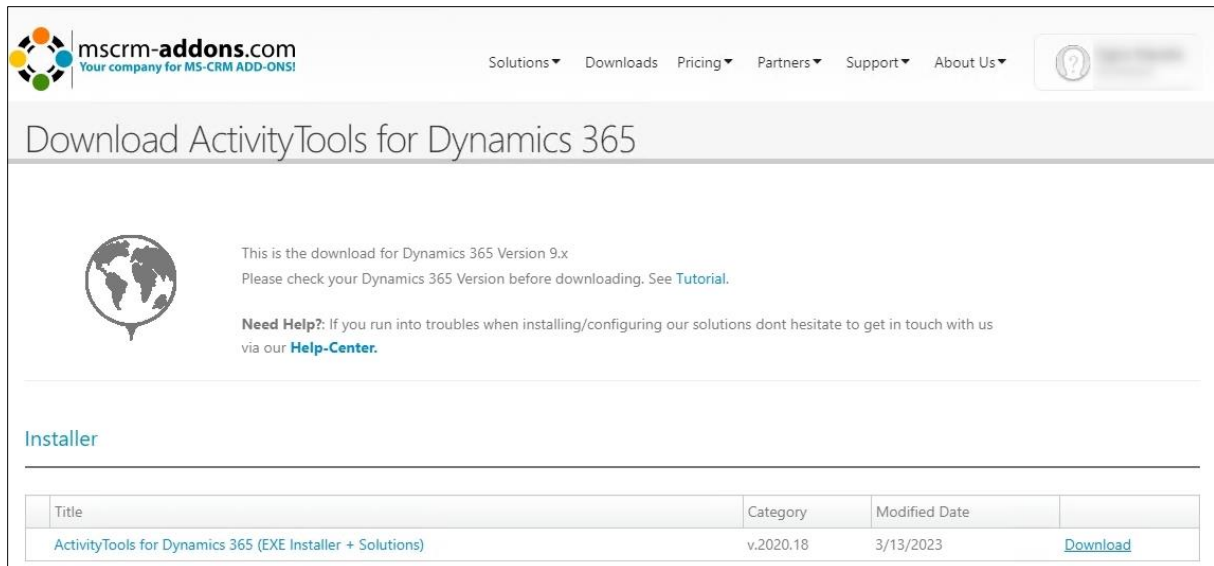
Follow [this article](#) for post AppSource installation.



Figure 1: ActivityTools in Microsoft AppSource

1.2. How to install ActivityTools via .exe-file

Alternatively (e.g. for on-Premise deployments) you can [download](#) the .exe file from our homepage www.mscrm-addons.com.

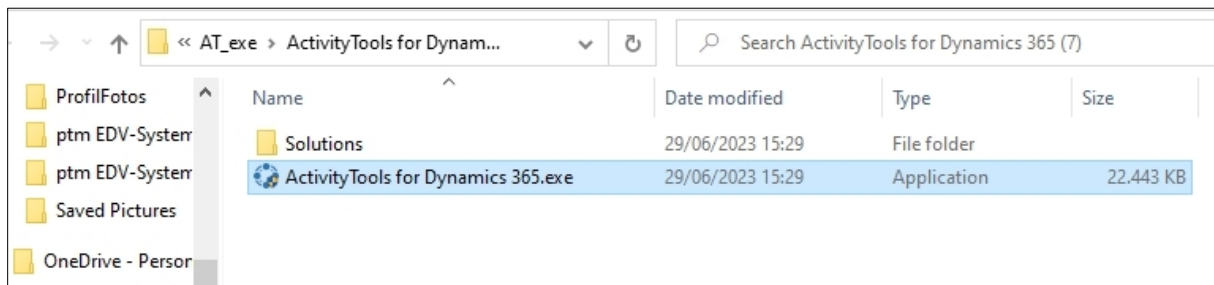


The screenshot shows the website [mscrm-addons.com](http://www.mscrm-addons.com) with the following navigation items: Solutions, Downloads, Pricing, Partners, Support, and About Us. The main heading is "Download ActivityTools for Dynamics 365". Below the heading, there is a globe icon and text stating: "This is the download for Dynamics 365 Version 9.x. Please check your Dynamics 365 Version before downloading. See [Tutorial](#)." A "Need Help?" section follows, encouraging users to contact the Help-Center. Below this, there is an "Installer" section with a table of download links.

Title	Category	Modified Date	
ActivityTools for Dynamics 365 (EXE Installer + Solutions)	v.2020.18	3/13/2023	Download

Figure 2: Download .exe file from our homepage

Open your Download folder, extract and run the .exe file by clicking on it.



The screenshot shows a Windows File Explorer window with the address bar set to "AT_exe > ActivityTools for Dynam...". The search bar contains "Search ActivityTools for Dynamics 365 (7)". The left sidebar shows the navigation pane with folders like "ProfilFotos", "ptm EDV-System", "Saved Pictures", and "OneDrive - Persor". The main pane displays a table of files and folders:

Name	Date modified	Type	Size
Solutions	29/06/2023 15:29	File folder	
ActivityTools for Dynamics 365.exe	29/06/2023 15:29	Application	22.443 KB

Figure 3: run the .exe file in the Download folder

After allowing the app to make changes to your device the Installer for ActivityTools opens. Click **Next** to proceed.

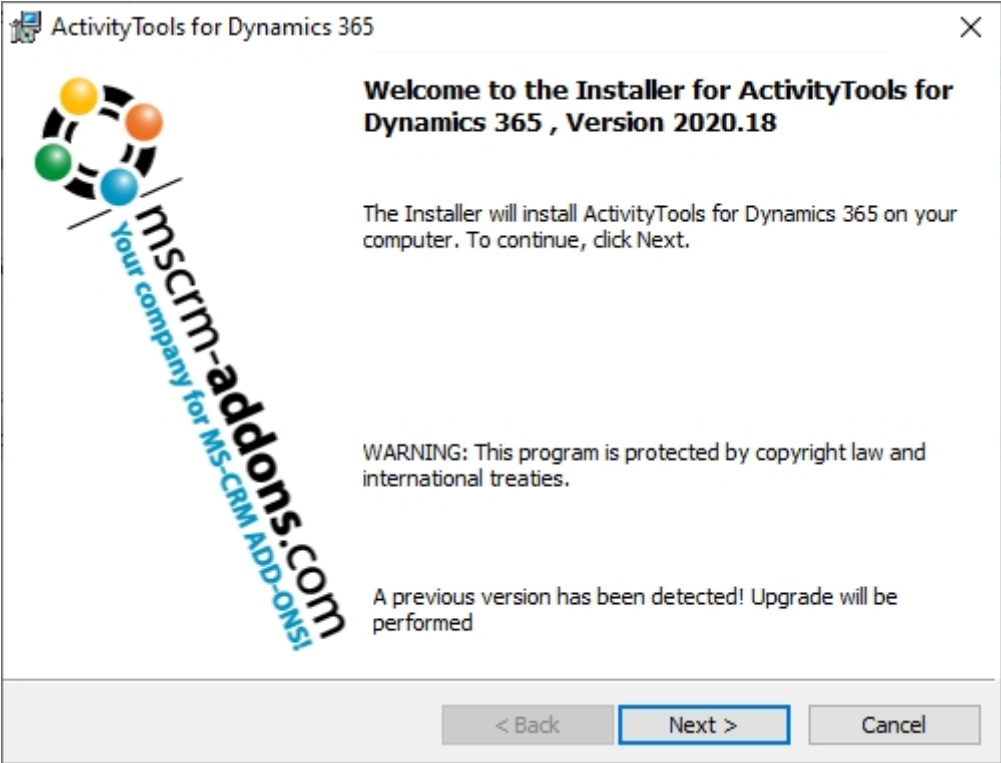


Figure 4: Installer opens

Please agree to the **Form of End User License Agreement**. Click **Next** to proceed.

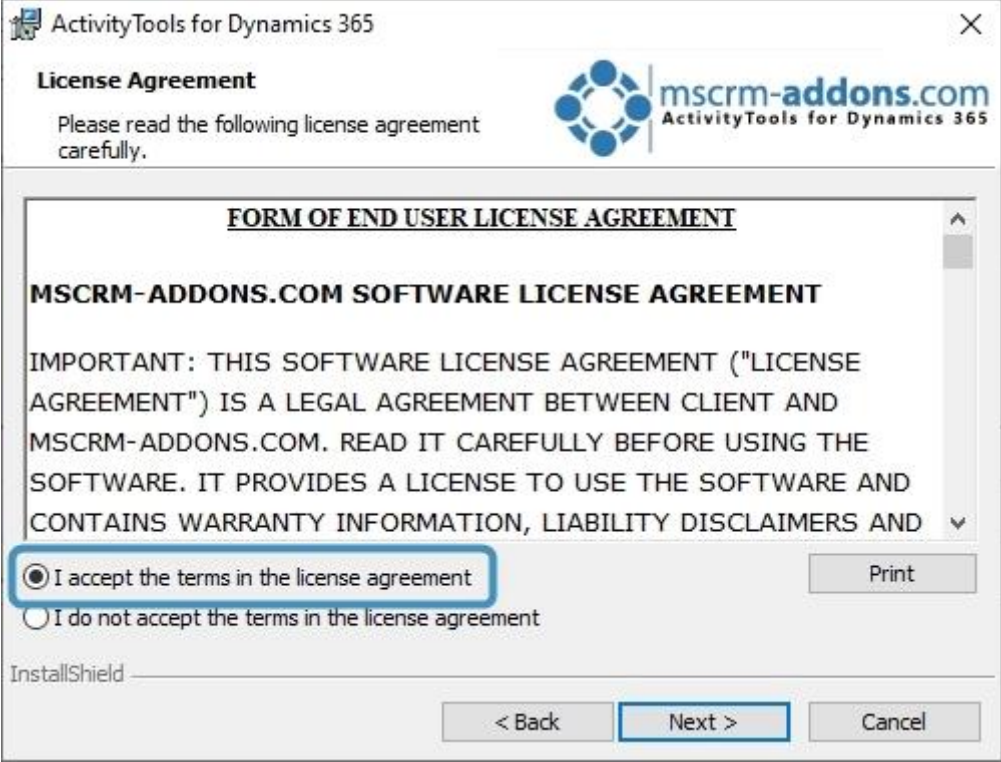


Figure 5: EULA

Now click **Install** to begin installation.

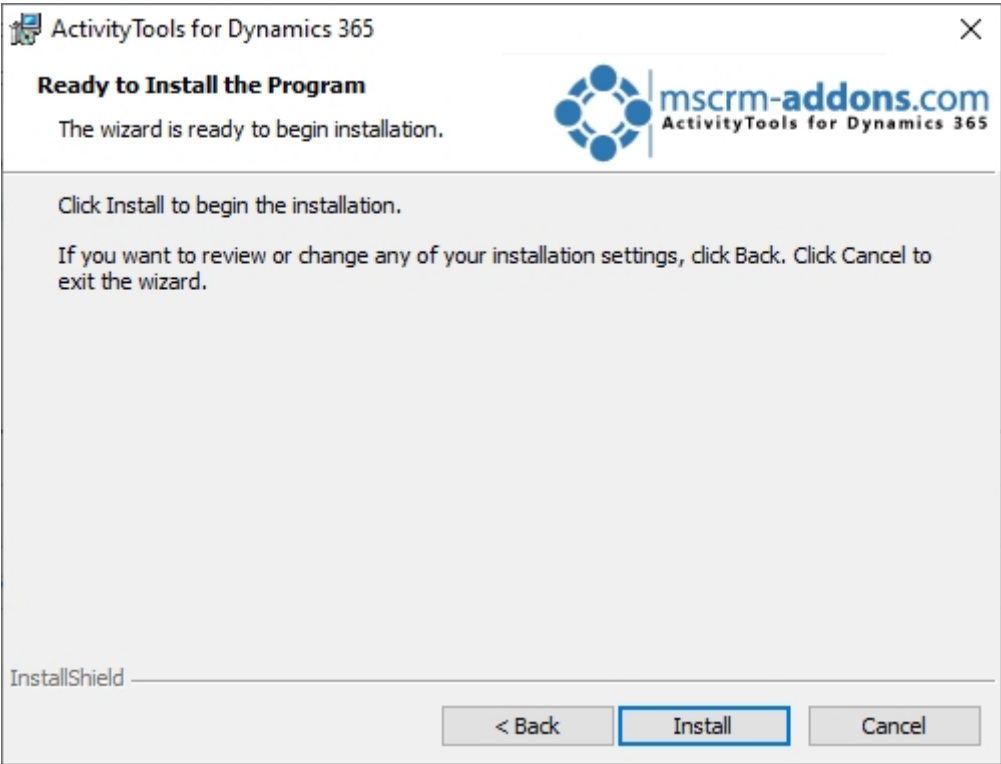


Figure 6: Begin Installation

ActivityTools is installing. This may take a few minutes.

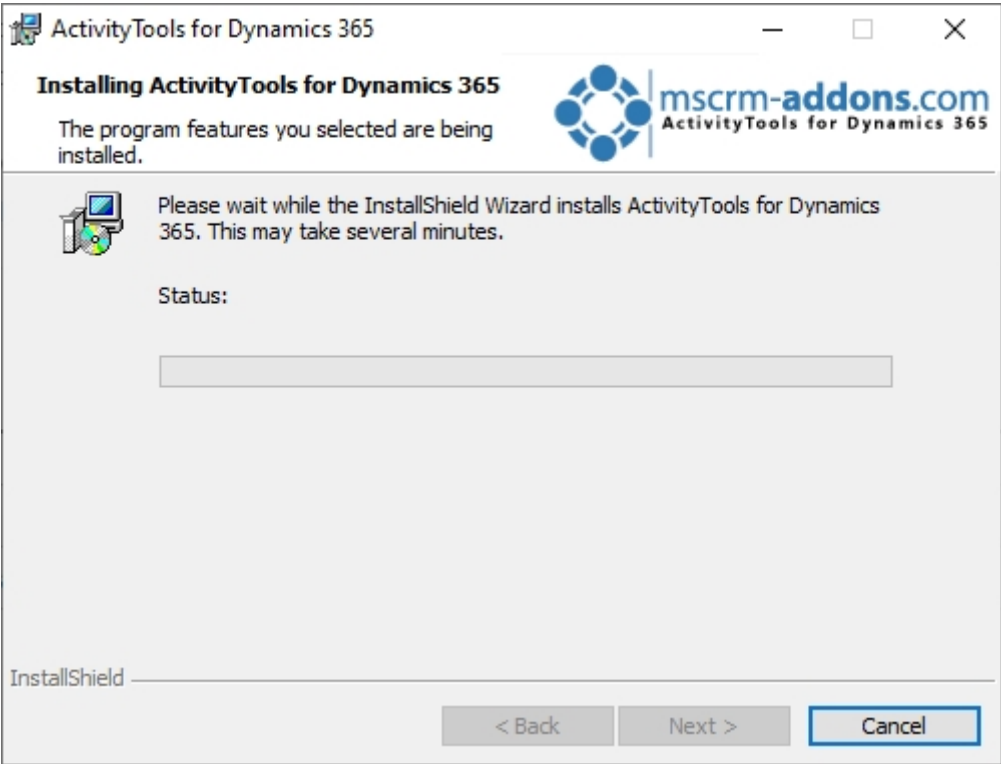


Figure 7: Installing

The **Dynamics 365 Connection setup** window opens. Now configure your Dynamics 365 server.

- 1 **Existing Profiles:** If you can see your profile in the drop-down select it.
- 2 **Select your Dynamics 365 Type:** Online
- 3 **Dynamics 365 Server-Url:** Enter your Dynamics 365 Server URL.
- 4 **Authenticated as:** Prefer Server2Server authentication.
- 5 **Retrieve all Organizations:** Click the button to retrieve the organization.
- 6 **Organization information:** Your organization will be displayed there.

Logon information - ActivityTools (2020.18)

Welcome to your Dynamics 365 Connection setup.

Please specify your connection details to connect to Dynamics 365. If you do not know the connection details, please contact your system administrator

Dynamics 365 Connection | Advanced Settings | Log

1 **Existing Profiles** [HKLM] https://o...4.dynamics.com - CRM1... Manage New

2 Select your Dynamics 365 Type

OnPremise IFD/Hosted Online AppAccess

3 Dynamics 365 Server-Url:

https://or...:crm4.dynamics.com ✓

4 Authenticated as:

Prefer Server2Server authentication (admin@CRM168820.onmicrosoft.com)

Server to server authentication enabled! Click on <Retrieve all Organization> to continue.
Note, that a separate authentication window from Microsoft Dynamics appears.
You must complete the logon and consent process to continue.

5 Retrieve all Organiza

6 Organization information:

Friendly name	Unique name	ServiceURL
CRM1	ur...3...	org...8

OK Cancel

Figure 8: Dynamics 365 connection setup

When this window opens, click the Save button in order to save the profile.

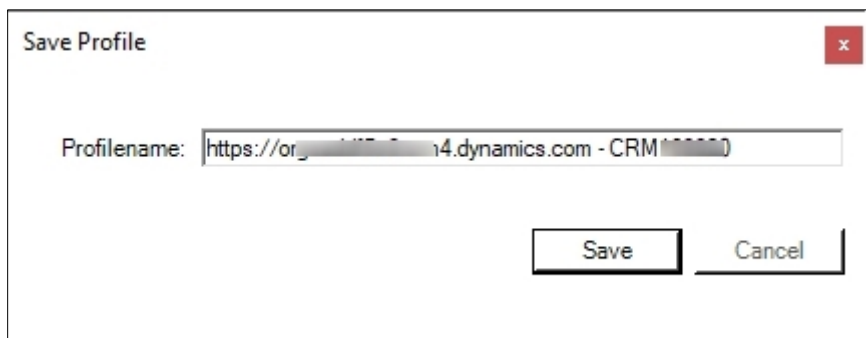


Figure 9: Save profile after connection setup

When this information is shown, click Yes if you want to install additional demo forms, which are already configured for the entities **account** and **contact**.

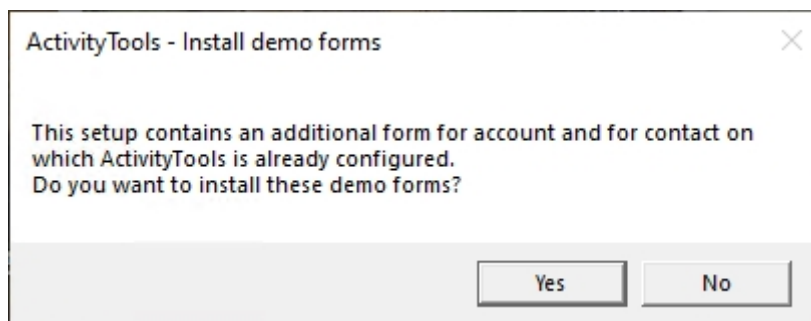


Figure 10: Install demo forms

Now click on Finish to complete the InstallShield Wizard.

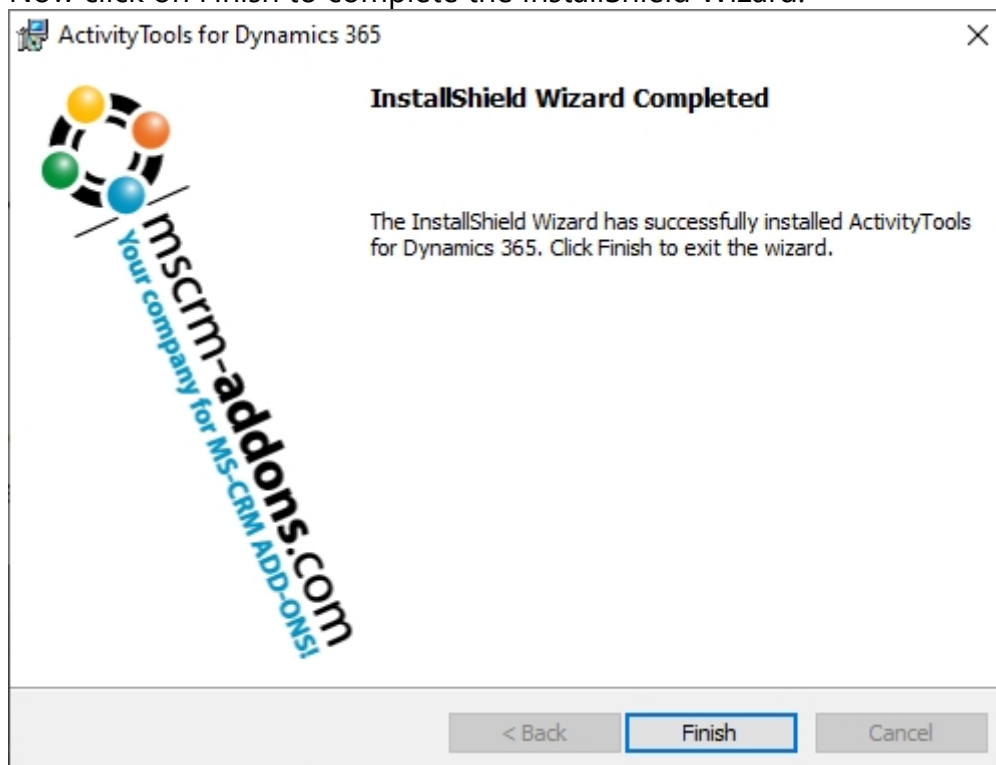


Figure 11: Finish installation

1.2.1 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](#).

When working with the installer, you first have to call up the Dynamics 365 connection setup. Enter Configuration ActivityTools in the search field of the Windows start pane.

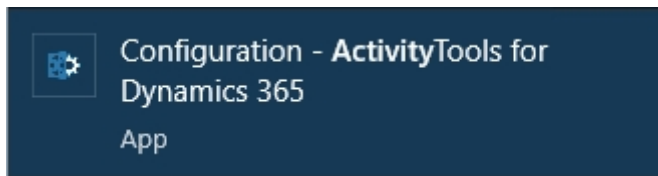


Figure 12: Search in the Windows start pane for ActivityTools configuration

When you access the Dynamics 365 Connection setup dialog, you will be presented with options to configure your connection. Select the relevant organization from the provided list and click on the **Retrieve all Organizations** button to proceed.

Please note: In most cases, the system will have already pre-selected the appropriate organization, requiring you to simply click on the **OK** button. However, double-checking the data is always a good practice to ensure accuracy.

If you require additional guidance on using the Dynamics 365 Connection dialog, we recommend referring to our comprehensive [Connection Dialog](#) Documentation available on our website.

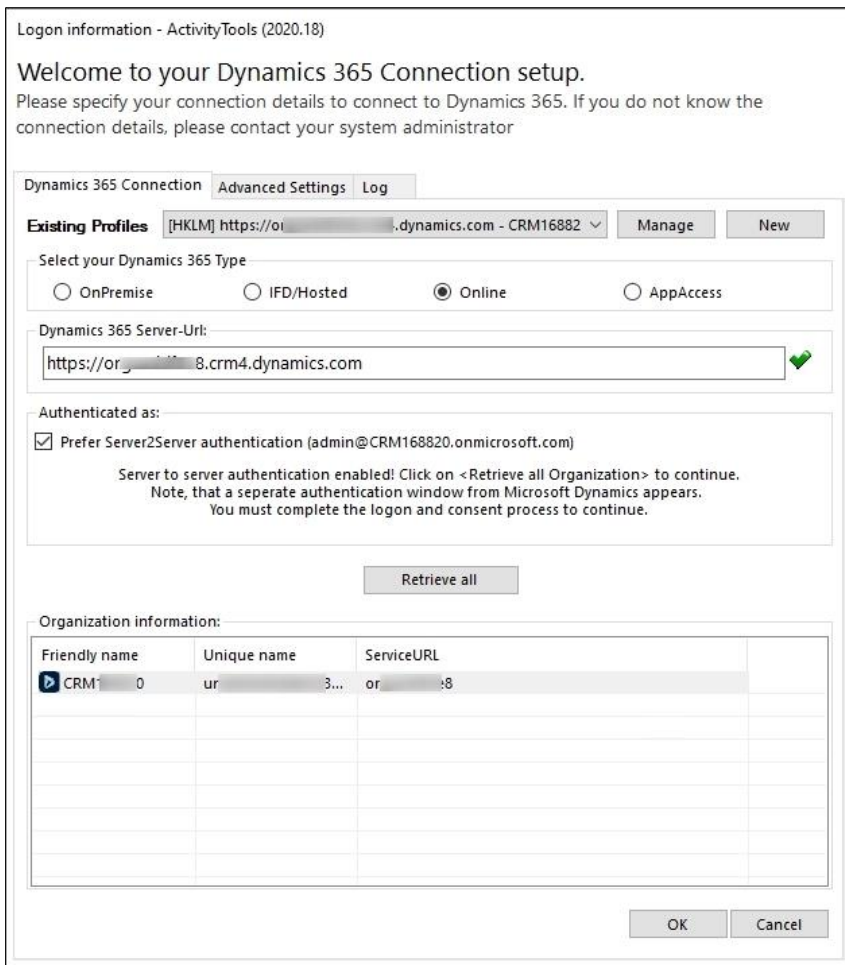


Figure 13: Connection setup via solution

The following **Organization overview** opens. If you select the organization in this overview, a bunch of function buttons get visible.

1 Reinstall/Upgrade: Select the organization (in case there are more than one) in the list and click the **Reinstall/Upgrade** button.

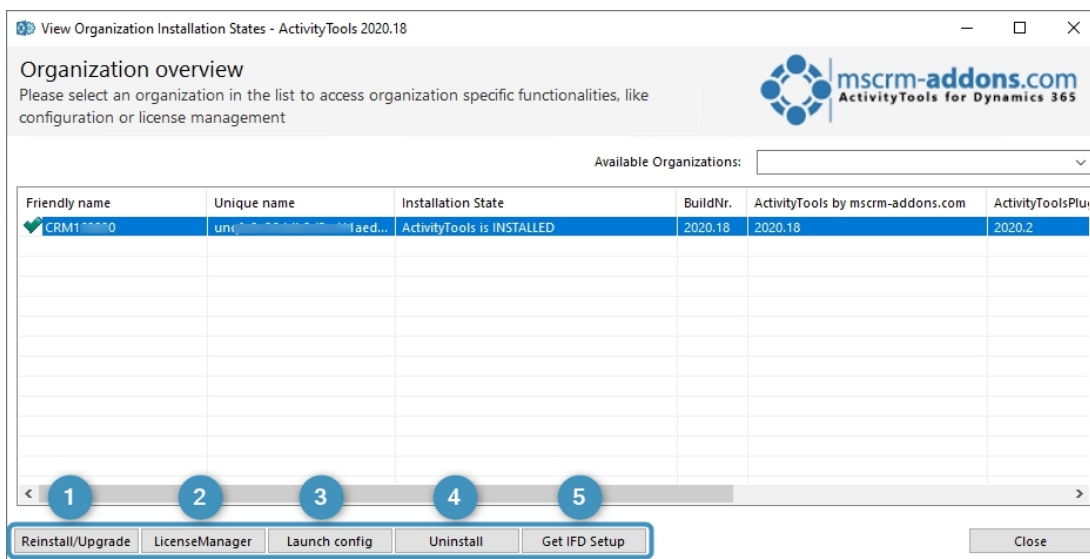


Figure 14: Organization overview

2 LicenseManager: Select an organization and click the **LicenseManager** button to open the LicenseManager. Figure 12 shows that the license is valid.

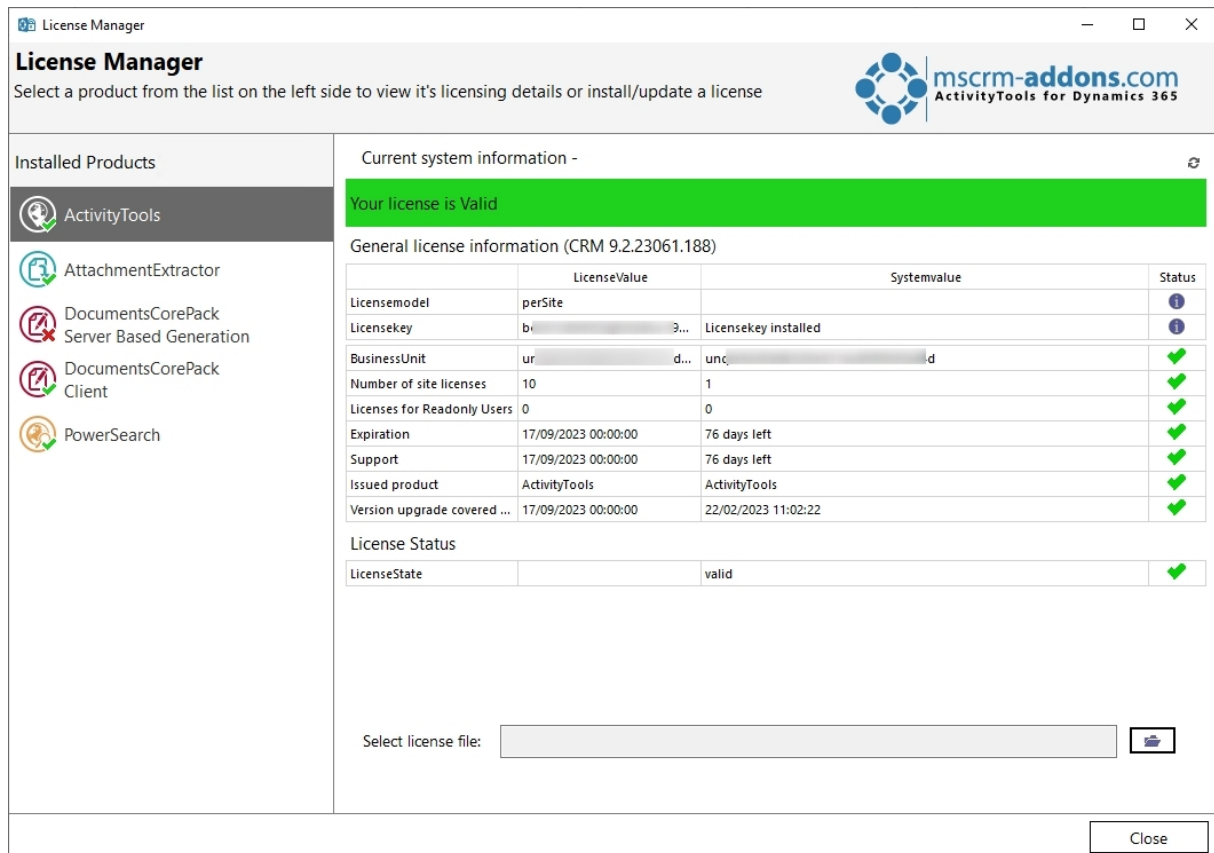


Figure 15: LisenceManager

To upload the license file simply use the upload in the bottom area. For more information on the License Manager have a look at our [documentation](#).

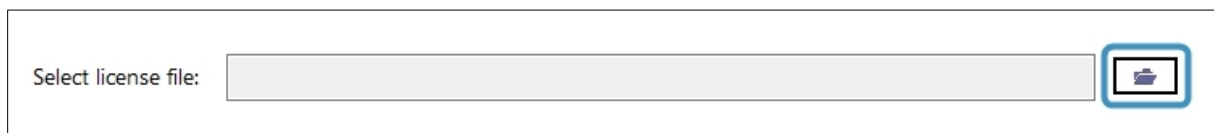


Figure 16: Upload license

If you encounter any issues with your license, we encourage you to reach out to us promptly for assistance. To ensure efficient handling of your request, we kindly request that you send us an email at support@mscrm-addons.com, including a screenshot of the problem as an attachment. Our dedicated support team is eager to provide you with prompt and helpful answers, as well as effective solutions to resolve any concerns you may have.

- 3 Launch config:** This button opens the Configuration page in Dynamics 365.
- 4 Uninstall:** Here, you can uninstall ActivityTools.
- 5 get IFD Setup:** Learn [here](#) more.

1.3. How to install ActivityTools via solution import (manually)

In some cases, it is necessary to install our mscrm-addons.com solutions manually. Here is shown how this can be done in Dynamics 365.

Navigate in Dynamics 365 to **Settings** and to **Solutions**.

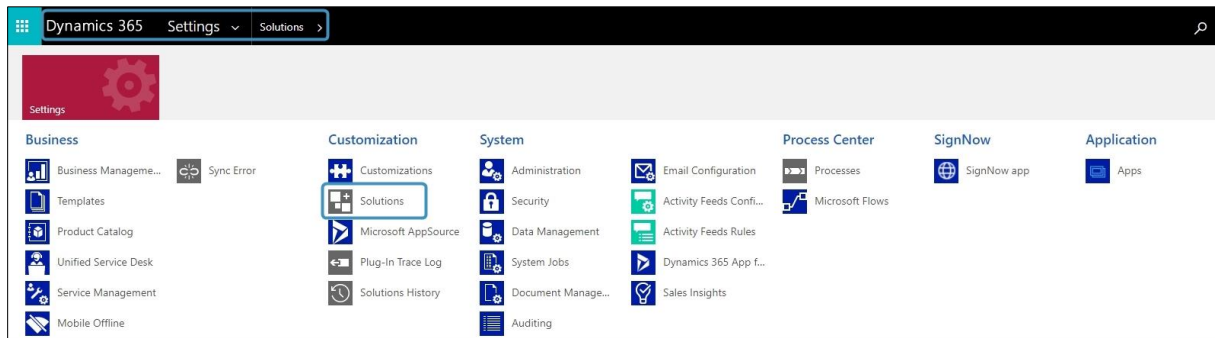


Figure 17: Dynamics 365 > Settings > Solutions

In the **All Solutions** overview select **Import**.

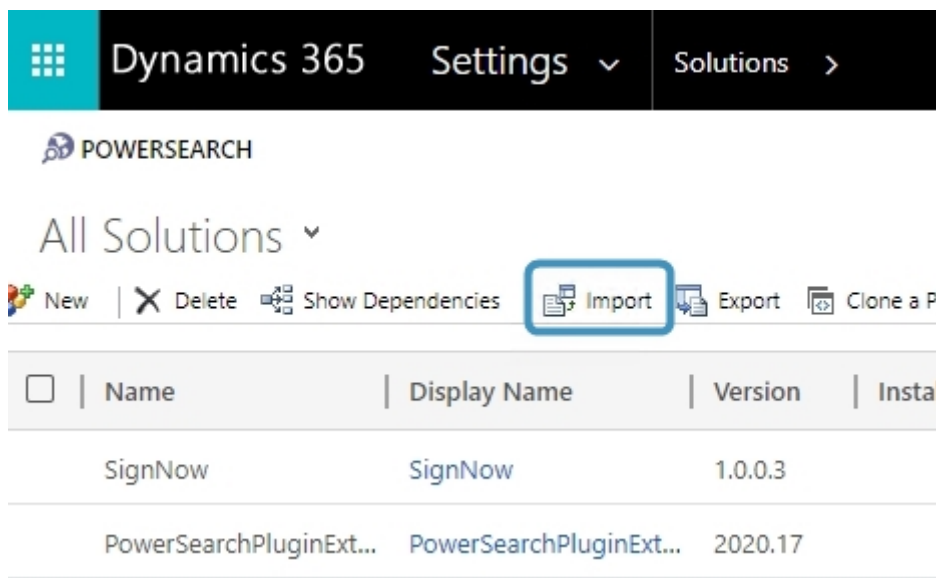


Figure 18: All Solutions overview

Select the Solution Package like in Figure 14 and continue with **Next**.

Please note: It is of upmost importance to upload the two mandatory files in the following order!

- 1 **MSCRM-ADDONScomGeneral.zip**
- 2 **ActivityToolsPluginCore.zip**

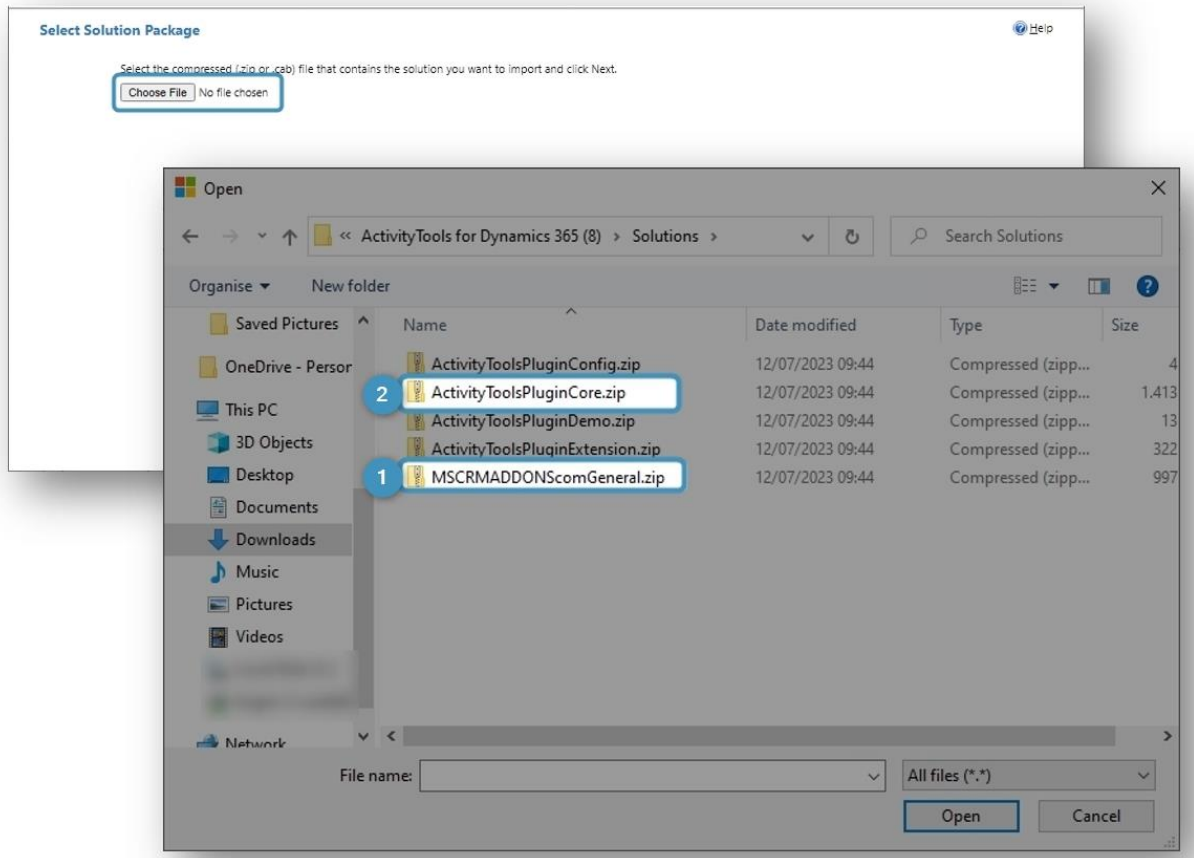


Figure 19: Select Solution Package

After a double-click on **MSCRM-ADDONScomGeneral.zip** this window is shown. Continue with **Next**.

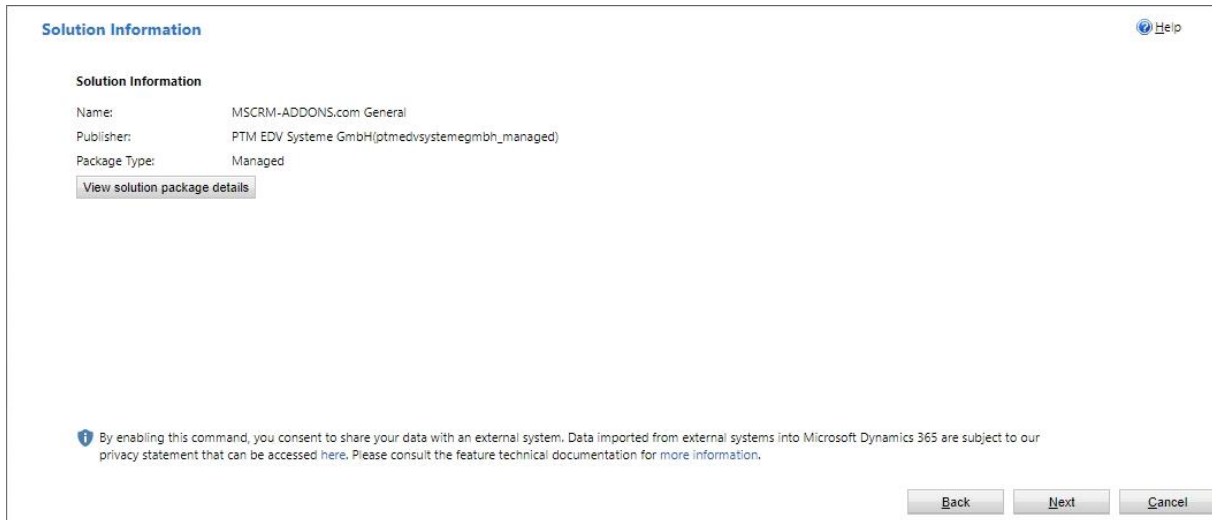


Figure 20: Solution information

Enable any SDK message processing steps included in the solution. Click on **Import**.

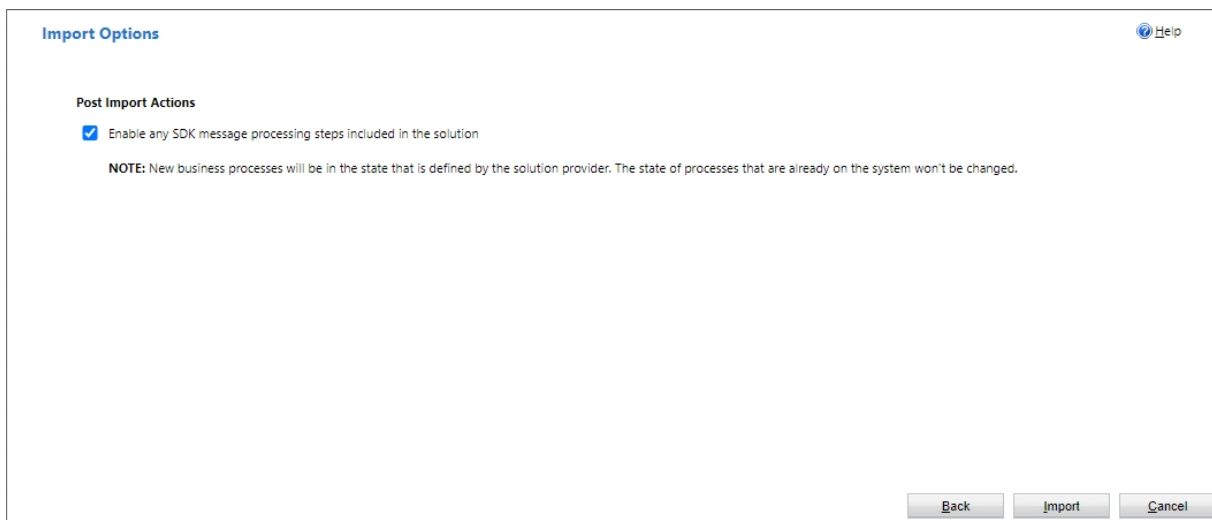


Figure 21: Import options

The solution gets imported. Please wait for the operation to complete.

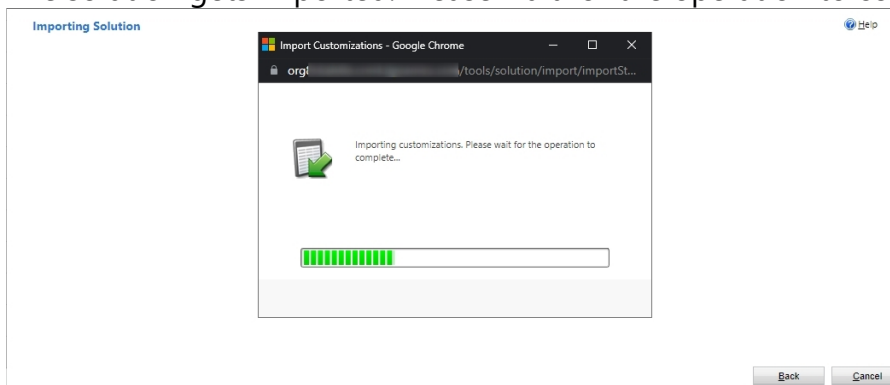


Figure 22: Importing Solutions

The import of the solution **MSCRM-ADDONS.com General** is completed successfully. The ribbon client metadata is being refreshed in the background.

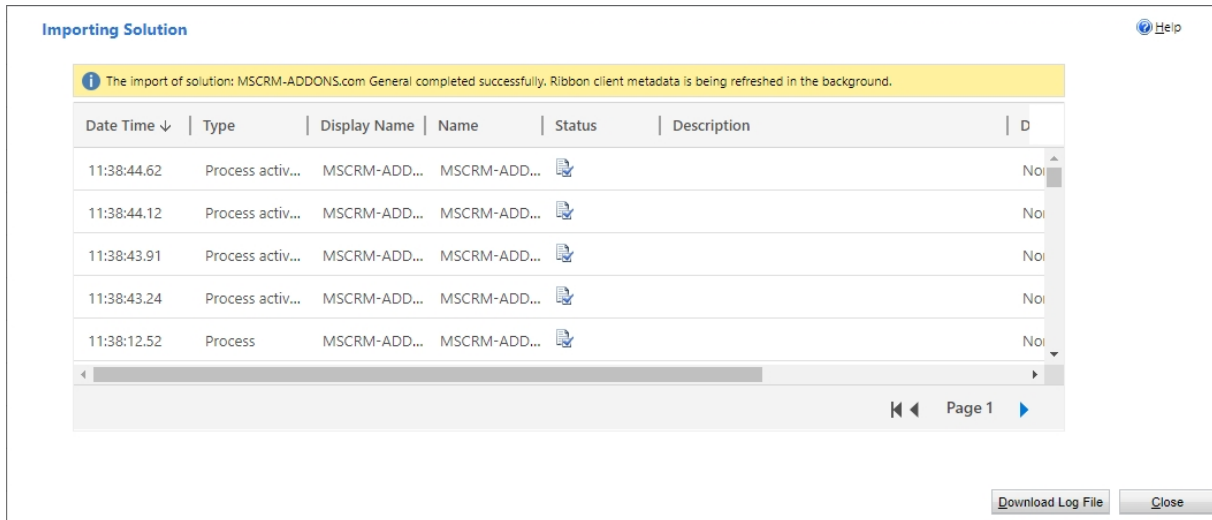


Figure 23: Imported solution

Now repeat the procedure for **ActivityToolsPluginCore.zip**.

Please note: 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.
- **ActivityToolsPluginExtension:** For more functionalities, like drag & drop capabilities for attachment uploads, please import the **ActivityToolsPluginExtension** solution as well.

2. Configuration Page

To open the configuration page, simply navigate in ① Dynamics 365 → ② Settings → ③ MSCRM-ADDONS → ④ ActivityTools. The ActivityTools Configuration page opens.

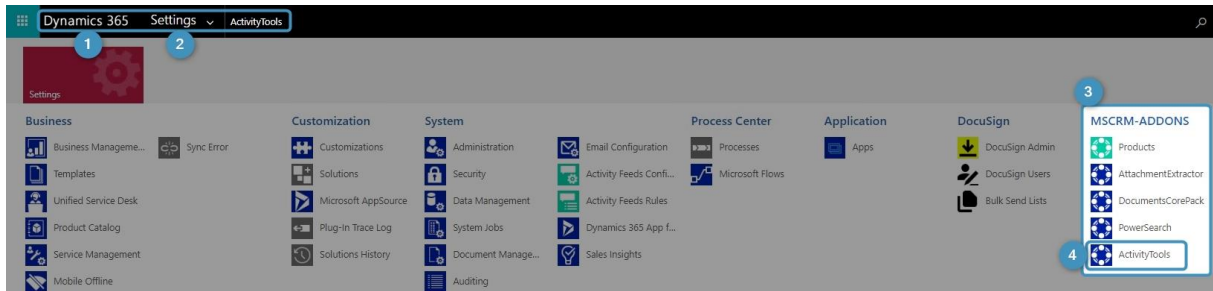


Figure 24: How to access ActivityTools configuration page

2.1. The Getting Started tab

This tab offers an overview and general details about ActivityTools, along with convenient links to our website. You can find all the valuable information about ActivityTools here. By scrolling down the page, you can discover the various pricing options available for ActivityTools, access the documentation library, explore interesting blog articles, and even use the contact button to directly reach our support team.

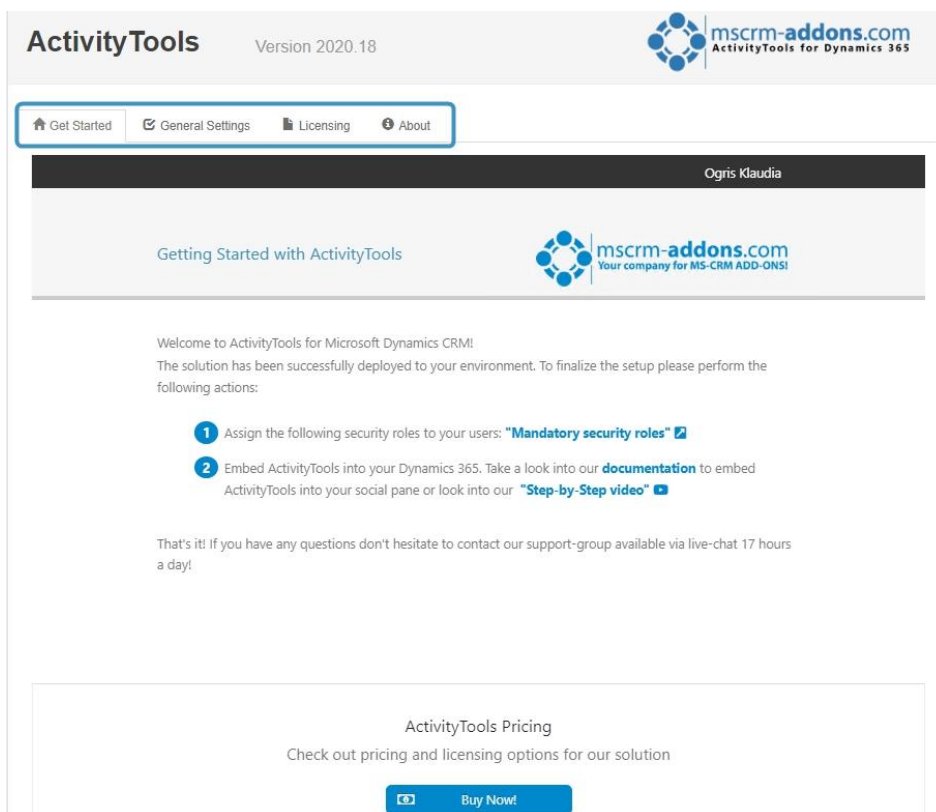


Figure 25: Get started configuration page ActivityTools

2.2. The General Settings tab

This tab allows you to change your general settings. Once changed, please do not forget to **15** save the settings!

The screenshot shows the 'ActivityTools' interface for version 2020.18. The 'General Settings' tab is active. The settings table is as follows:

General Settings	
1 Debugging ?	<input type="radio"/> Disabled last X hours <input type="button" value="Show"/> <input type="button" value="Download"/> <input type="button" value="Delete"/>
2 Sort Activities By ?	<input type="text" value="eg. createdon"/>
3 Page Size ?	<input type="text" value="eg. 150"/>
4 Don't use MORE button ?	<input type="radio"/> Disabled
5 Use Related "Regarding" Records ?	<input checked="" type="radio"/> Enabled
6 Status Filter ?	<input type="radio"/> Disabled
7 Confirm Advanced Search ?	<input type="text" value="eg. 1000"/>
8 Hide Activities in DropDown ?	<input type="text" value="eg. email,phonecall..."/>
9 Hide Activities in NEW ACTIVITY menu ?	<input type="text" value="eg. email,phonecall..."/>
10 Hide buttons on the Preview ?	<input type="text" value="eg. btnNew,btnReload..."/>
11 Don't add Attachments ?	<input type="radio"/> Disabled
12 Exclude Attachments embedded in Email content ?	<input type="radio"/> Disabled
13 Update Language Setting ?	<input type="button" value="Update"/>
14 Start Layout Designer ?	<input type="button" value="Open"/>

At the bottom of the settings area, there is a blue bar containing a '15' callout and a 'Save Configuration' button.

Figure 26: General Settings tab - ActivityTools

1 Debugging: If you activate Debugging, this window opens. Please confirm your choice.

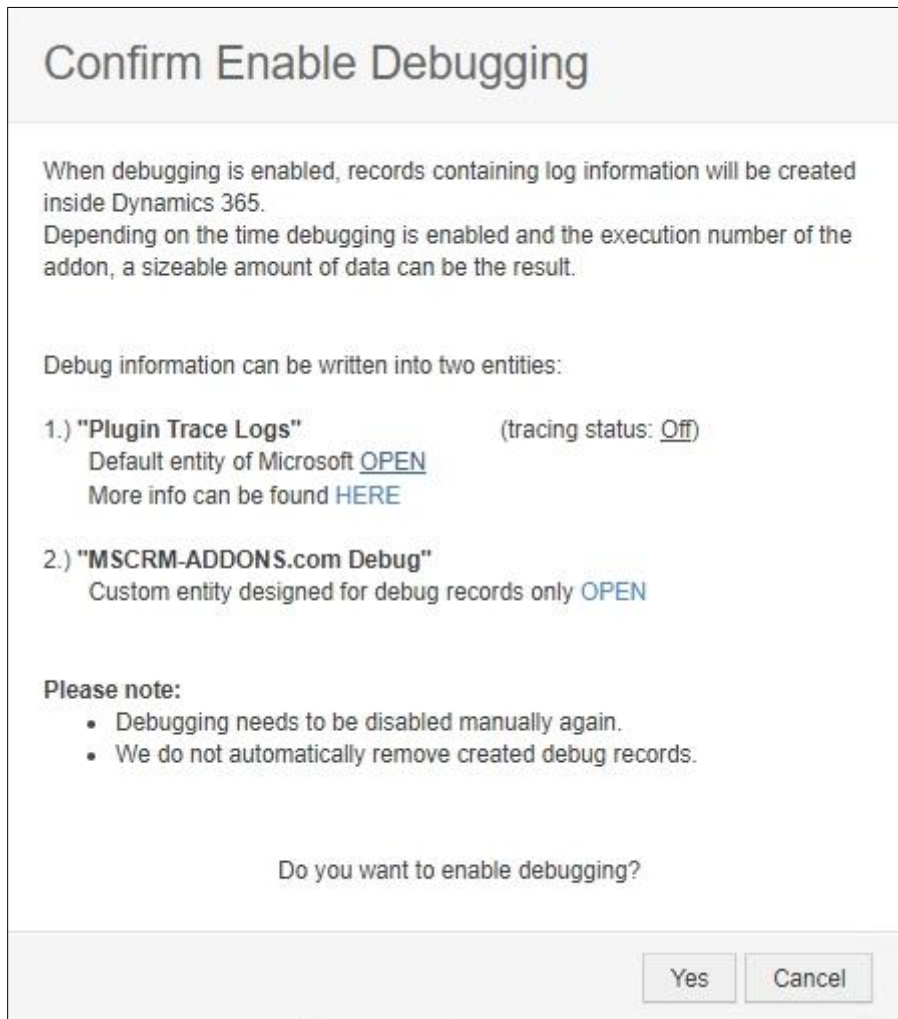


Figure 27: Enable Debugging

Once activated, you can use the buttons at the right side to modify the debugging process.

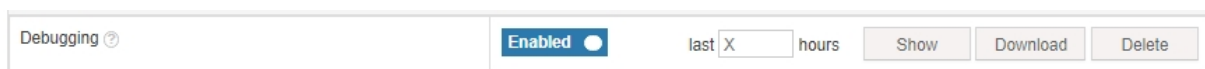


Figure 28: Debugging enabled

Show button: Displays all logs that were generated during the last x hours.

Download button: Download the log file in .xml

Delete button: Delete the log files.

2 Sort Activities by: This setting can be used to define how the activities in the grid should be sorted. If the setting is empty the default sort order will be used. For more info, please check [this article](#).

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

1. Sort all activities based on a date-field of the ActivityPointer-entity. Just fill in the logical name 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.

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>
```

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

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

3 Page Size: Define how many records should be loaded at once.

4 Don't use MORE button: If this setting is set to true, all related activities will be loaded automatically in case of filtering.

5 Use Related "Regarding" Records: Define which activities are shown for rollup entities (Account, Contact, Opportunity).

Enabled: Related Regarding Records.

Disabled: This Record only.

6 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 from the **13 Update Language** Setting.

You will be provided with the following Status Fields:

Open, Completed, Canceled, Scheduled

7 Confirm Advanced Search: Here you can define from which activity-count on the warning before starting the Advanced Find should be displayed. If you don't need the warning at all, set it to '0'.

8 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).

9 Hide Activities in NEW ACTIVITY menu: Define here the 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).

10 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)

Example: "btnNew,btnPrint" to hide the NEW ACTIVITY and the PRINT buttons.

11 Don't add Attachments: Deactivate with this setting the attachments.

12 Exclude Attachments embedded in Email content: Only show real email attachments in ActivityTools preview. Hide images embedded in email content like signature images. They can be shown via button click.

13 Update Language Setting: Click on this button to update the ActivityTools settings with the latest information of the Dynamics 365 Activity-entities. This can be useful in the following cases:


- You have created a new custom Activity-entity in Dynamics 365, but ActivityTools does not show it in the drop-down or New Activity section.
- You have installed a new Dynamics 365 language, but in the drop-down and New Activity section you still see labels in a wrong language.

14 Start Layout Designer: Enables you to design default forms for each activity entity.

15 Save configuration: Don't forget to save the settings you made.

2.3. The Licensing tab

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

ActivityTools Version 2020.18 

Get Started General Settings **Licensing** About

License summary

Licenseinformation	LicenseValue	Systemvalue	Status
LicenseState		valid	✓

General license information (CRM 9.2.23061.188)

Licenseinformation	LicenseValue	Systemvalue	Status
Licensemodel	perSite		?
Licensekey	boWr1zbhH23qFxQsExu+9w2b1e4pPV...	Licensekey installed	?

License validation information

Licenseinformation	LicenseValue	Systemvalue	Status
BusinessUnit	unqfe9a36ddb2d3ed11aed0000d3a64d	unqfe9a36ddb2d3ed11aed0000d3a64d	✓
Number of site licenses	10	1	✓
Licenses for Readonly Users	0	0	✓
Expiration	9/17/2023 12:00:00 AM	76 days left	✓
Support	9/17/2023 12:00:00 AM	76 days left	✓
Issued product	ActivityTools	ActivityTools	✓
Version upgrade covered till	9/17/2023 12:00:00 AM	2/22/2023 11:02:18 AM	✓


Install license Enable AAD Licensing User count info 

Figure 29: Licensing tab

If you click the **Install** button the Install license dialog opens. Enter your license key or a Subscription Number. [Learn more](#).

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.

2. To finish the installation, hit the "OK"-button.

Or Enter a Subscription Number:

Figure 30: Enter license key or subscription number

2.4. The About tab

The **About** tab provides you with general information regarding to your license and the Copyright.

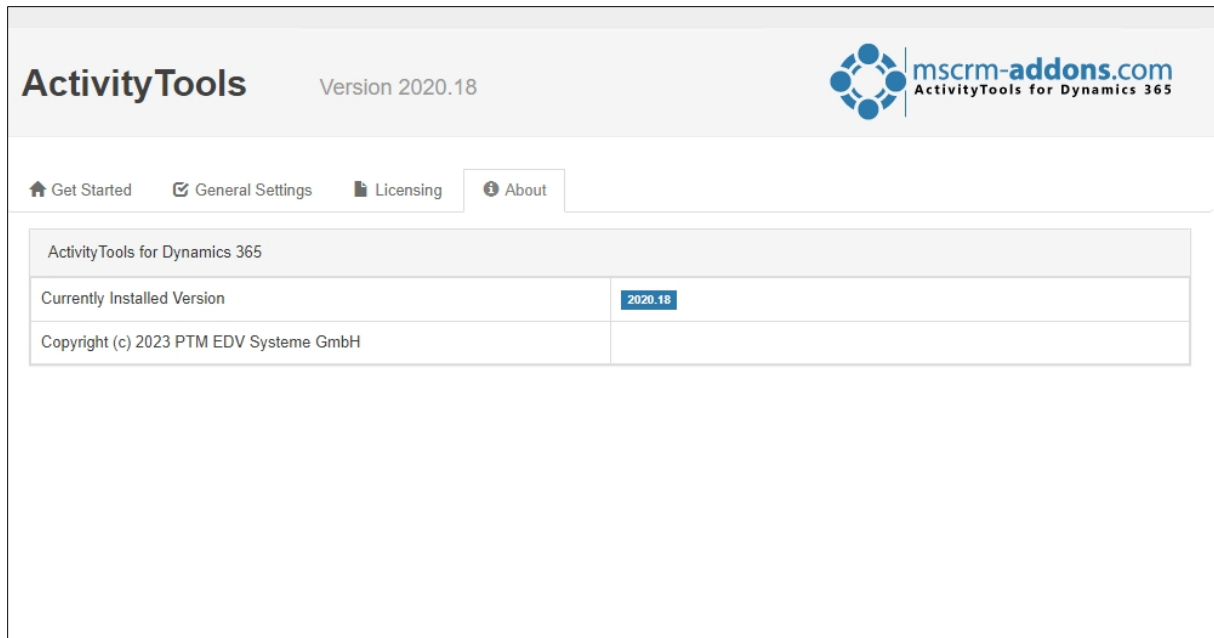


Figure 31: About tab

2.5. 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.

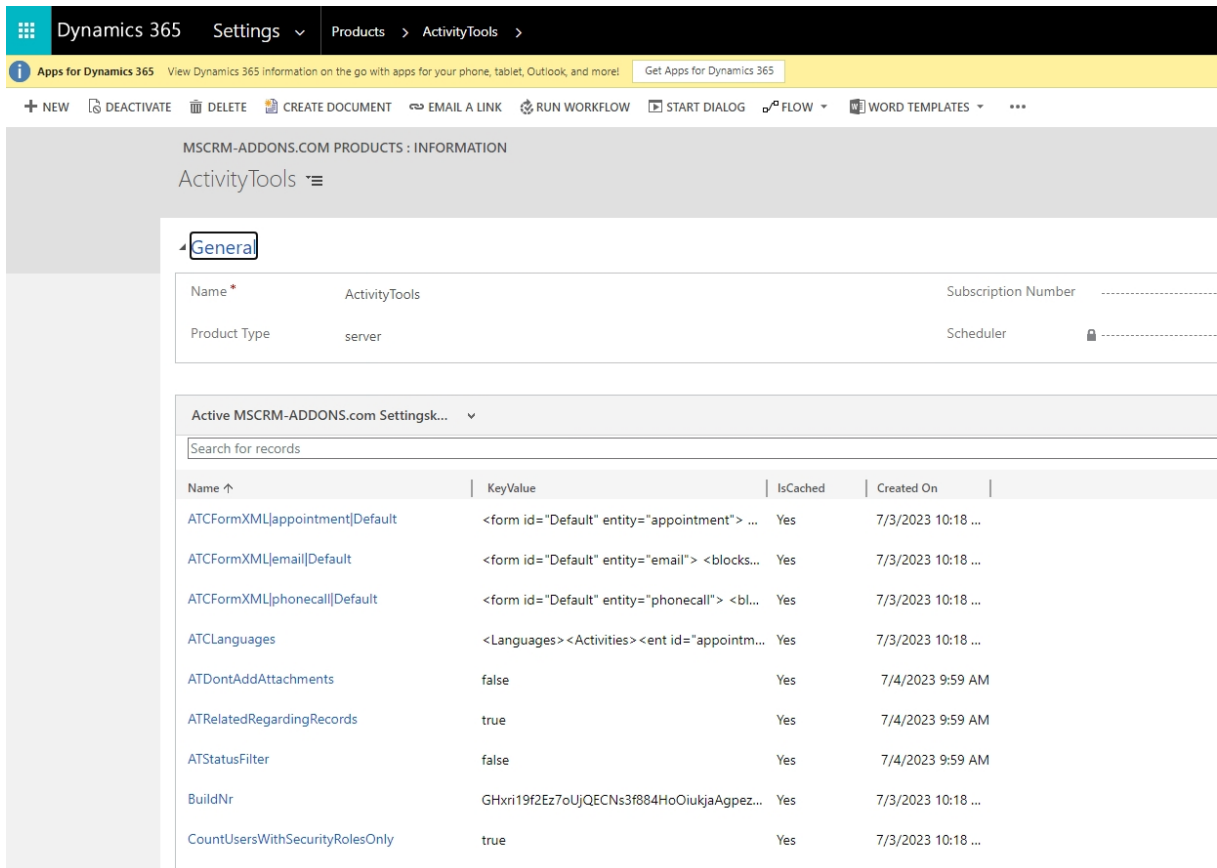


Figure 32: ActivityTools product setting

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.

2.5.1 Custom buttons

Via the "**ATCCustomButtons**" setting custom buttons can be added to the top of the preview. On click, they execute a defined custom JavaScript function.

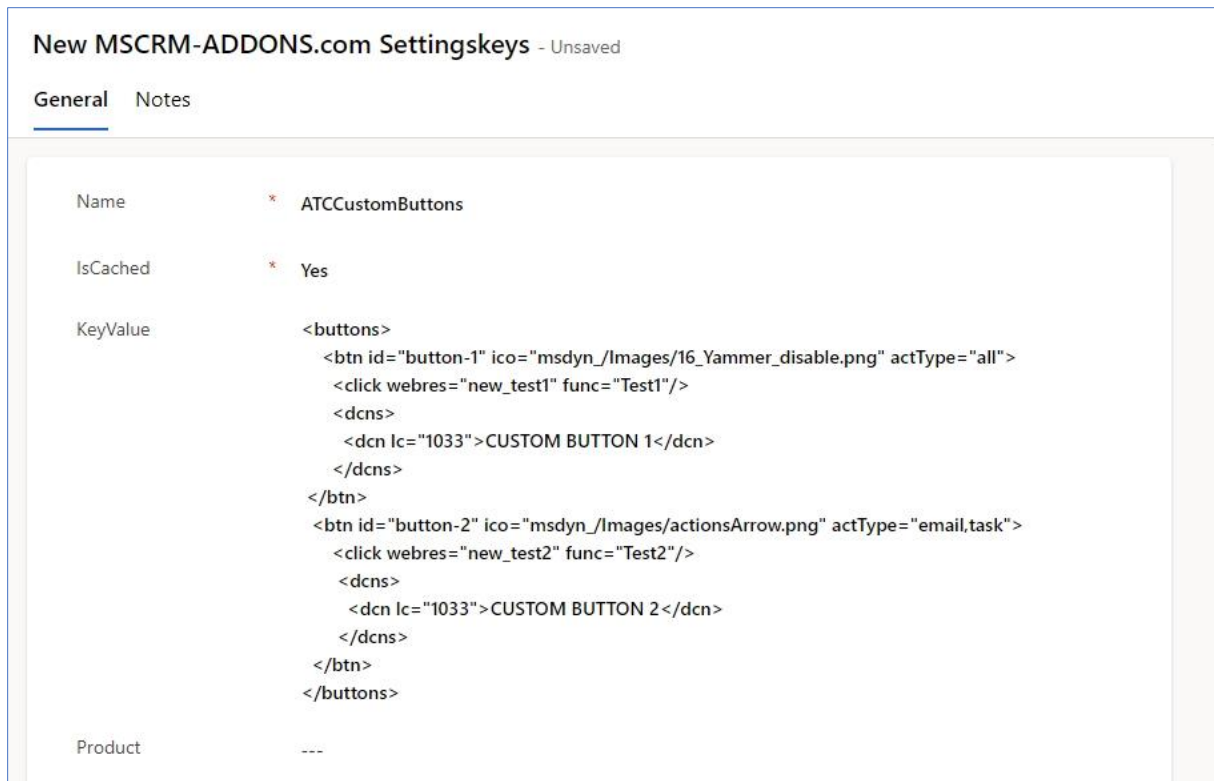


Figure 33: ATCCustomButtons

<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 web resource 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.

2.5.2 Grid Custom Columns

Via the **GridCustomColumns** setting custom columns can be added to the grid of ActivityTools. This can be used to display additional Dynamics 365 fields. More information can be found [here](#).

2.5.3 ATPluginFilter

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

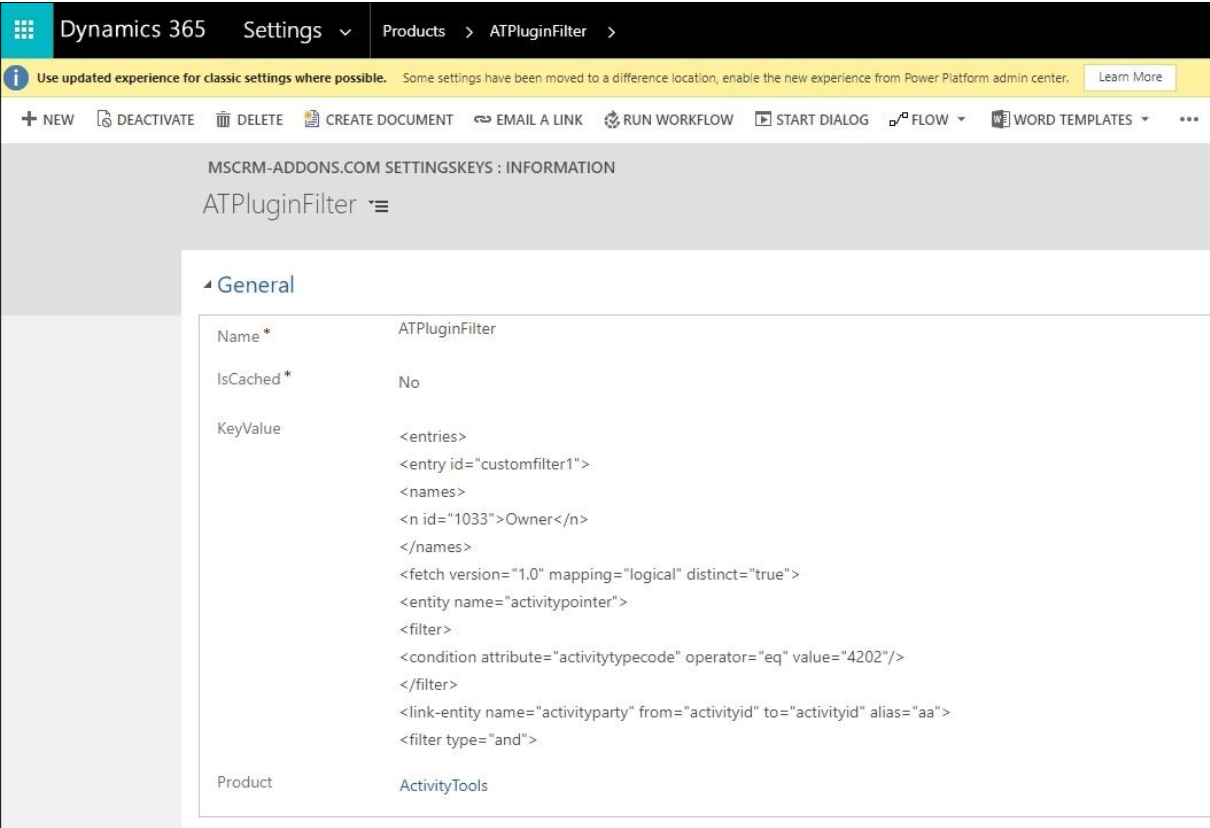


Figure 34: ATPluginFilter

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, ...).

2.5.4 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.

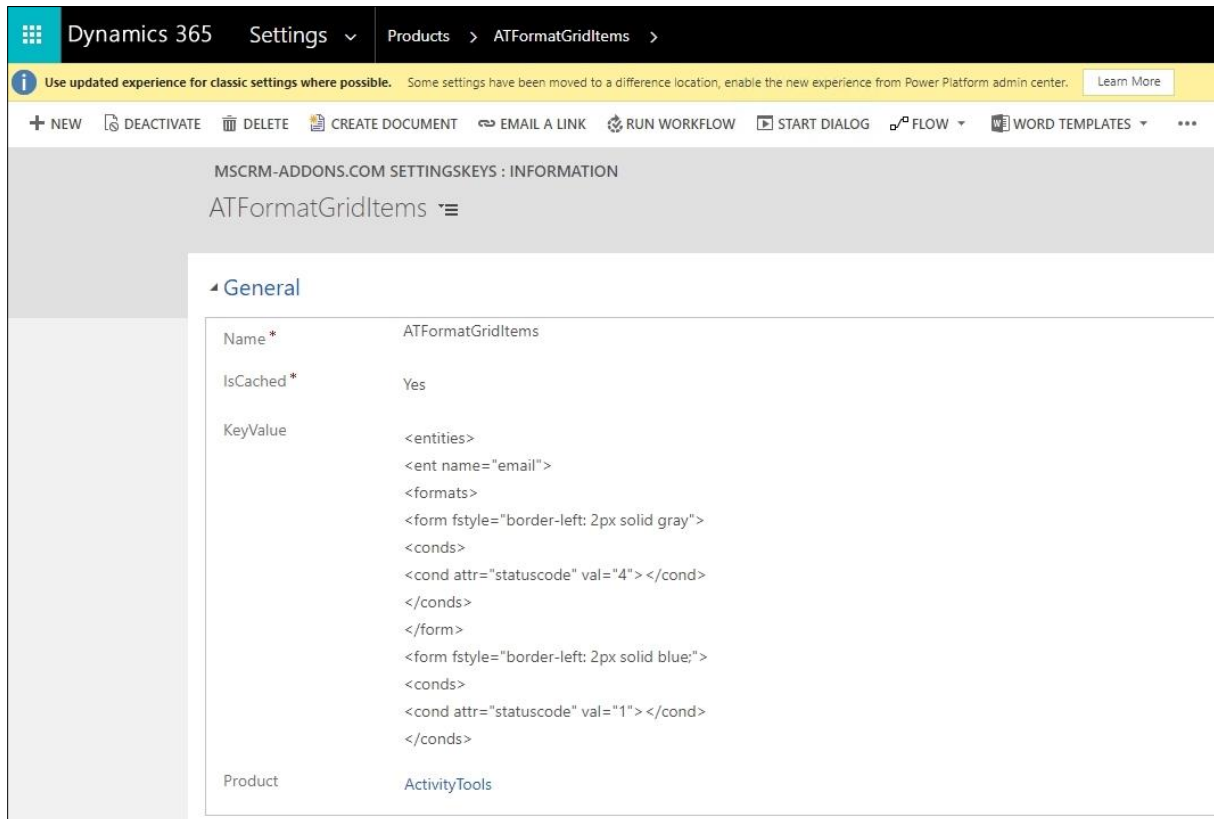


Figure 35: ATFormatGridItem

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`

3. How to embed ActivityTools in Microsoft Dynamics 365

Basically, you can distinguish between

- Entity Record Related Preview and
- User Related Preview (My Activities)

Learn here in a step-by-step tutorial how to embed ActivityTools in your Dynamics 365 environment.

Step 1: First add **MSCRM-ADDONS.com ActivityTools** security role to your users.

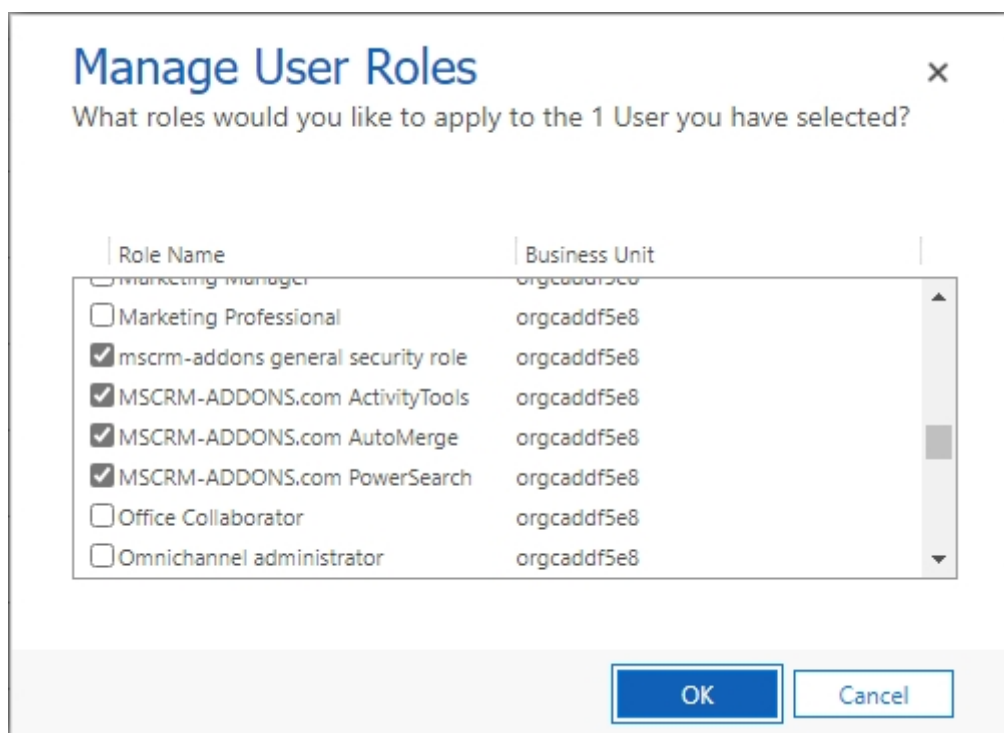


Figure 36: Assigning security role

Therefore, open in Dynamics 365 → Advanced Setting → Security → Users → Manage Roles.

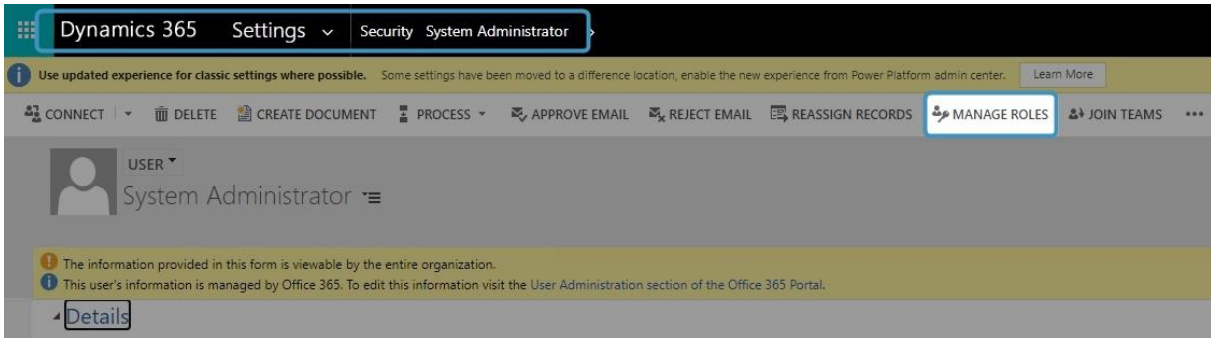


Figure 37: Access the Manage User Roles

Step 2: To embed ActivityTools into Dynamics 365 open the [Power Apps](#) maker experience and navigate to Tables (entity) and select the one you want to add Activitytools for.

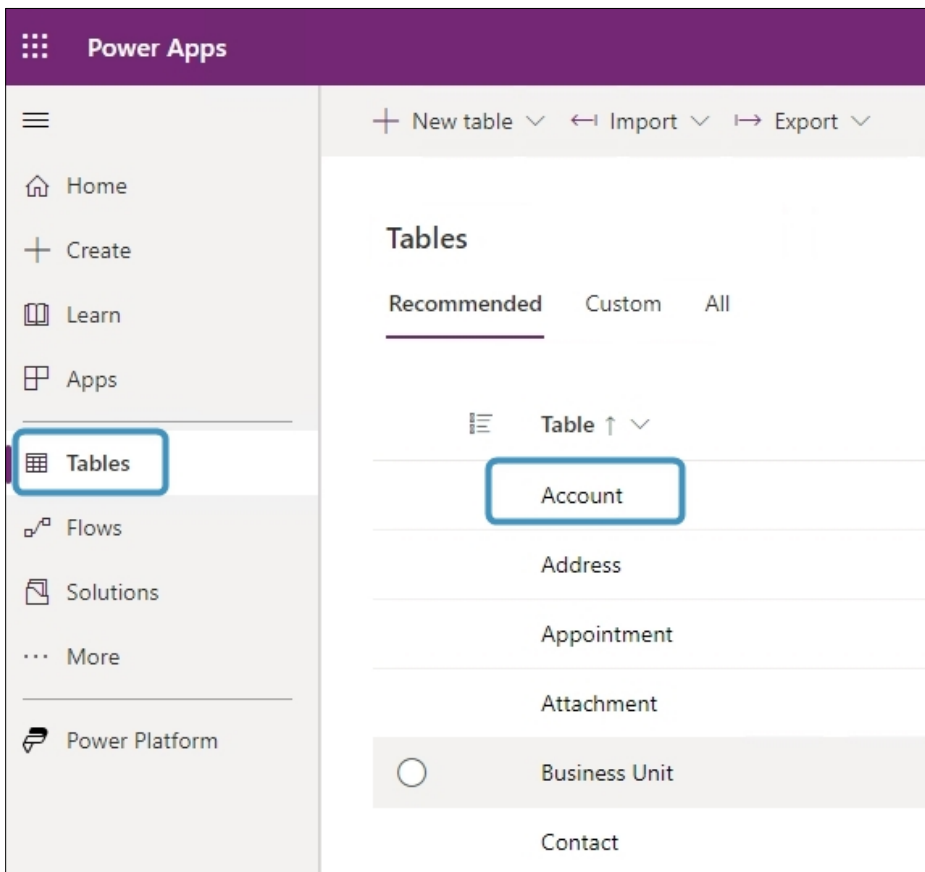


Figure 38: Power Apps - Tables Account

Step 3: In the Form editor select **Component** and click on **HTML web resource** under the component **Display**.

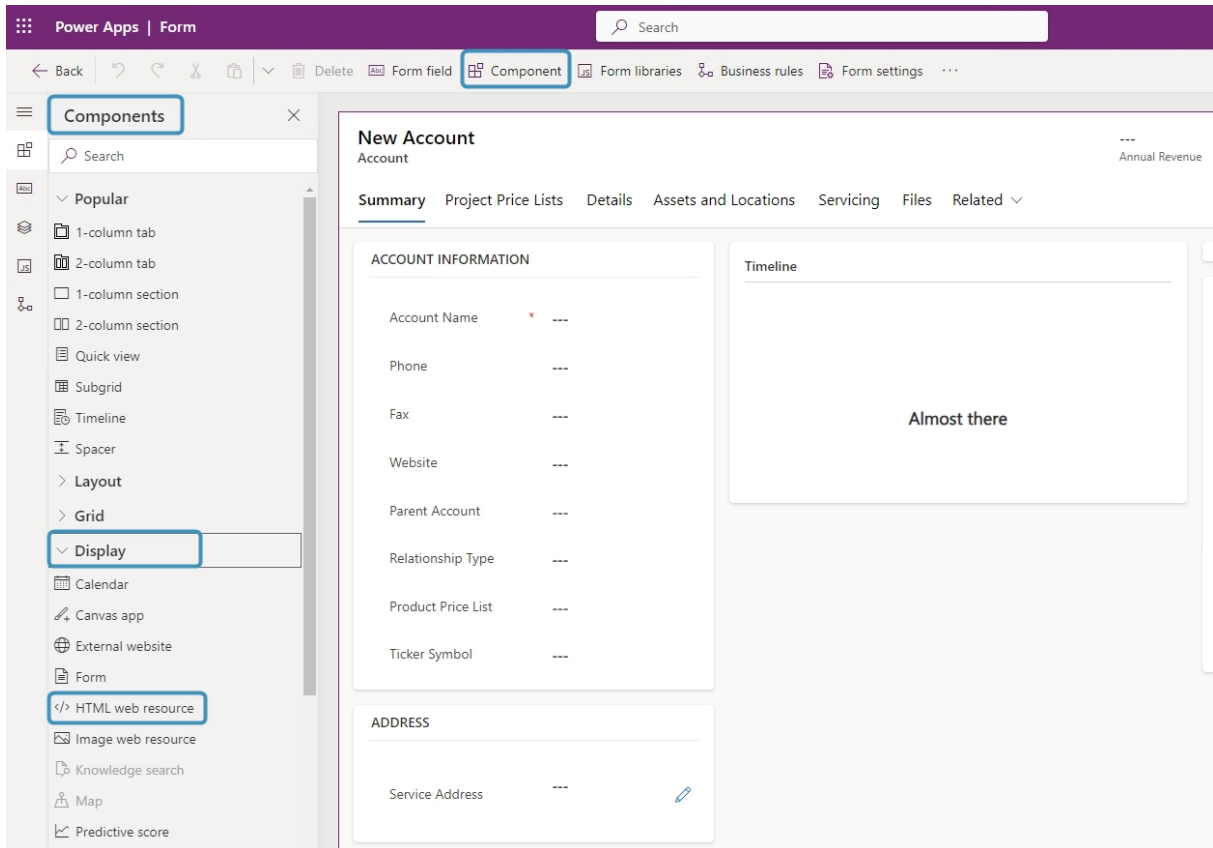


Figure 39: The Form editor

Step 4: In the HTML web resource window which opens, locate the web resource called **ptm_ActivityTools/MainPage.html** and **Add** it.

Please note: In Figure 40 The **Add** button is greyed out because the web resource is already added.

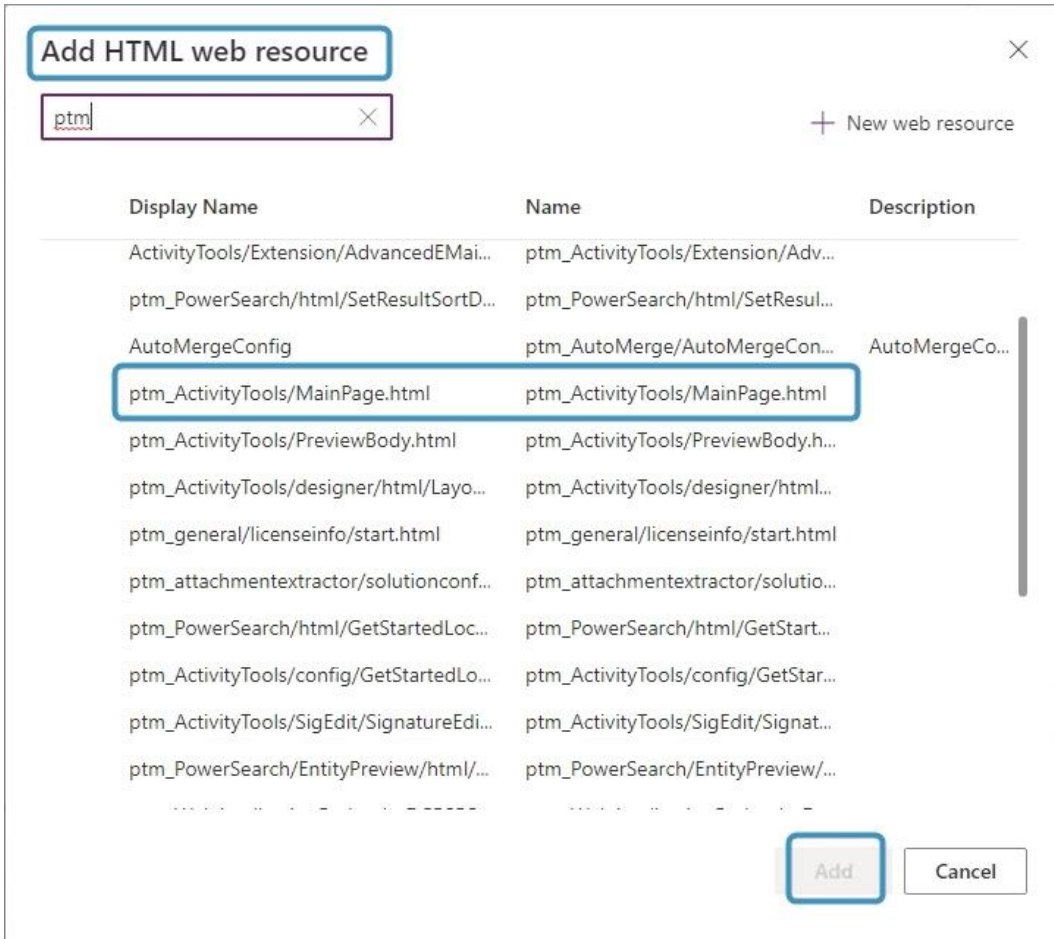


Figure 40: Add HTML Web resource

Step 5: Now **Save and publish** your customizations.

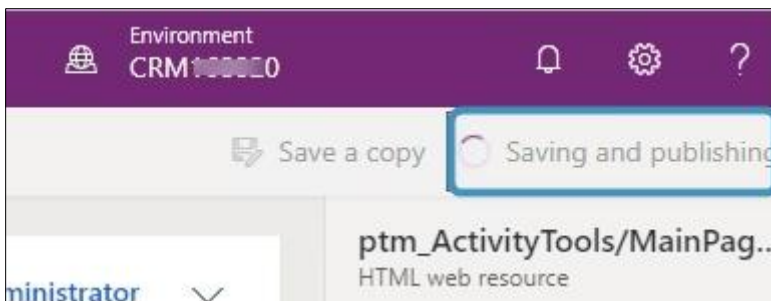


Figure 41: Save and publish your customizations

Step 6: Now when select the Account record, ActivityTools will be displayed.

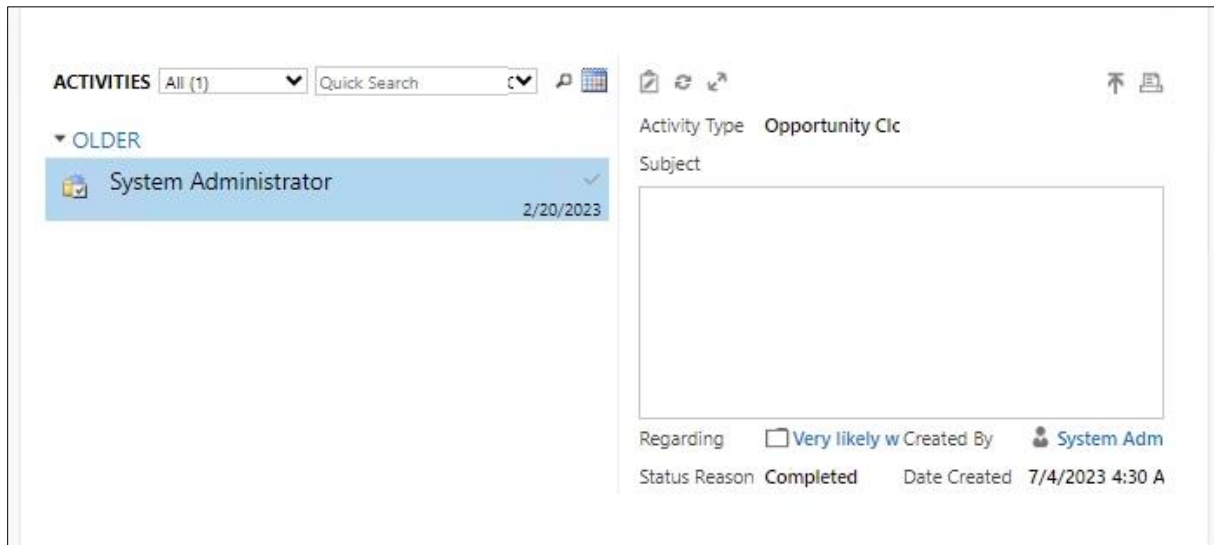


Figure 42: the ActiveTools tile

4. How to use the ActivityTools Layout Designer

The Layout Designer helps you to create, import, export or edit the ActivityTools Layout.

4.1. How to start the ActivityTools Layout Designer

In Dynamics 365 open the **Advanced Settings** and navigate to the **MSCRM-ADDONS** column and open **ActivityTools**.

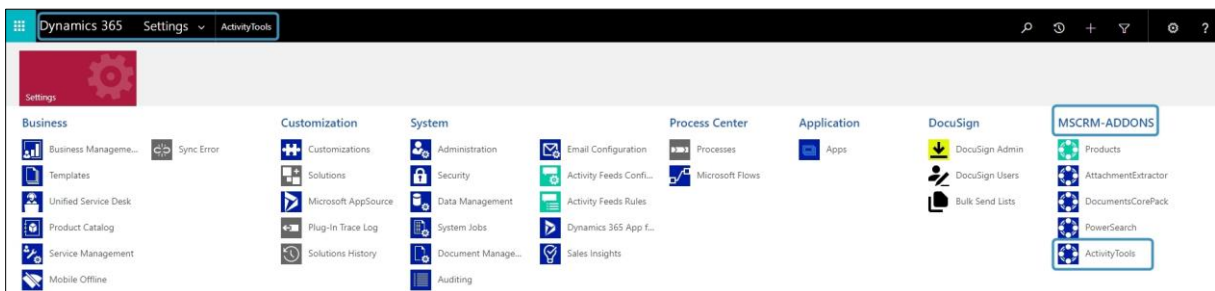



Figure 43: Open ActivityTools in Dynamics 365

The **Get Started** page from **ActivityTools** is shown. Navigate to the **General** tab, scroll down to **Start Layout Designer** and open it.

ActivityTools

Version 2020.18


🏠 Get Started
☑ General Settings
📄 Licensing
📄 About

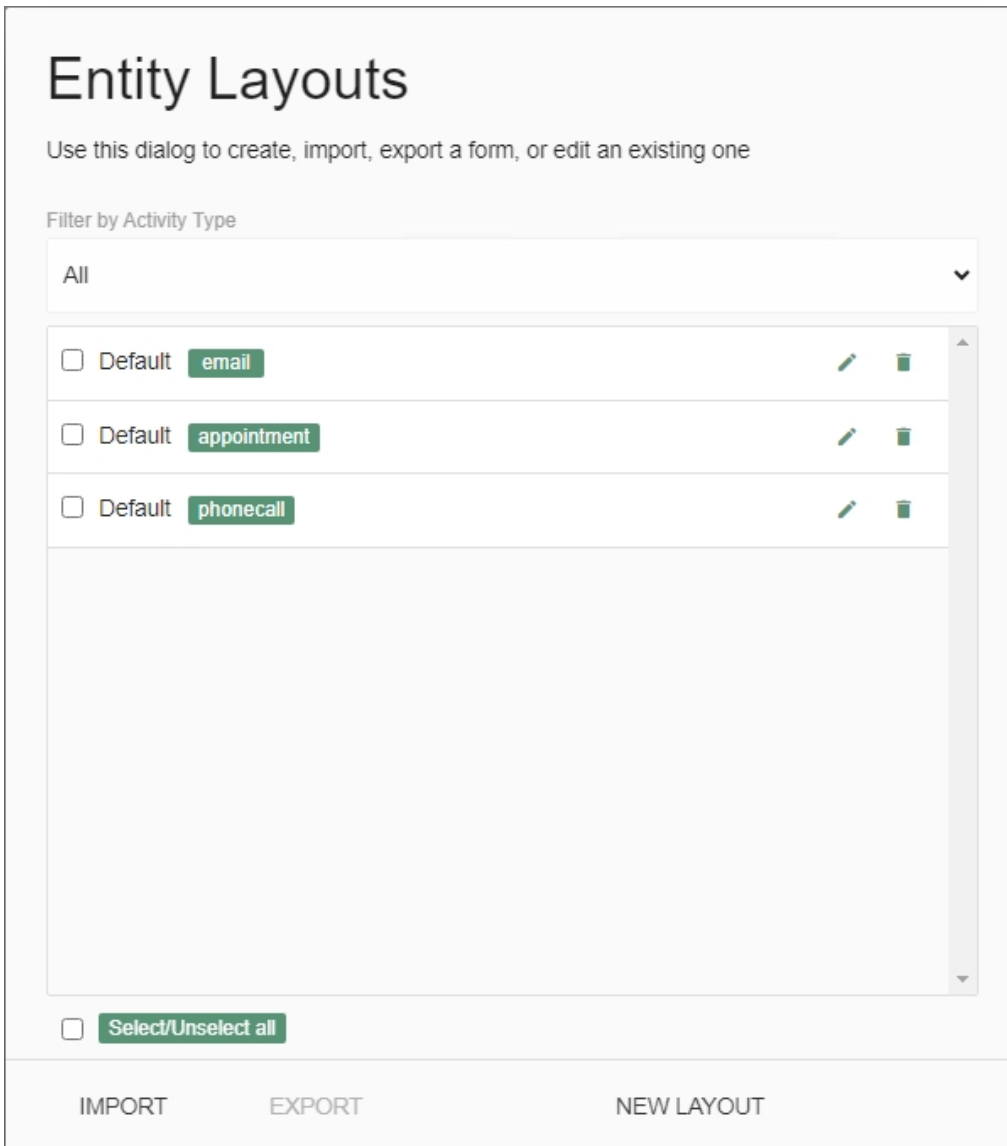
⚙ General Settings

Debugging ?	Enabled <input checked="" type="checkbox"/> last <input type="text" value="X"/> hours Show Download Delete
Sort Activities By ?	<input type="text" value="eg. createdon"/>
Page Size ?	<input type="text" value="eg. 150"/>
Don't use MORE button ?	Enabled <input checked="" type="checkbox"/>
Use Related "Regarding" Records ?	Enabled <input checked="" type="checkbox"/>
Status Filter ?	Disabled <input type="checkbox"/>
Confirm Advanced Search ?	<input type="text" value="eg. 1000"/>
Hide Activities in DropDown ?	<input type="text" value="eg. email.phonecall..."/>
Hide Activities in NEW ACTIVITY menu ?	<input type="text" value="eg. email.phonecall..."/>
Hide buttons on the Preview ?	<input type="text" value="eg. btnNew,btnReload..."/>
Don't add Attachments ?	Disabled <input type="checkbox"/>
Exclude Attachments embedded in Email content ?	Disabled <input type="checkbox"/>
Update Language Setting ?	Show Update
Start Layout Designer ?	Show Open

📄 Save Configuration

Figure 44: Open Layout Designer

The Layout Designer opens. The dialog allows you to create, import, export or edit a layout in ActivityTools. Check the default label and select the action you would like to take.



The image shows a dialog box titled "Entity Layouts". At the top, it says "Use this dialog to create, import, export a form, or edit an existing one". Below this is a "Filter by Activity Type" dropdown menu currently set to "All". The main area contains a list of three layout entries, each with a checkbox, the word "Default", a green pill-shaped label with the activity type, and edit/delete icons. The entries are: "email", "appointment", and "phonecall". At the bottom of the list is a checkbox and a "Select/Unselect all" button. The bottom of the dialog has three buttons: "IMPORT", "EXPORT", and "NEW LAYOUT".

Activity Type	Layout Name	Default	Actions
email	Default	<input type="checkbox"/>	edit, delete
appointment	Default	<input type="checkbox"/>	edit, delete
phonecall	Default	<input type="checkbox"/>	edit, delete

Select/Unselect all

IMPORT EXPORT NEW LAYOUT

Figure 45: Layout catalog for tables

4.2. The Activity Tools Layout Designer

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

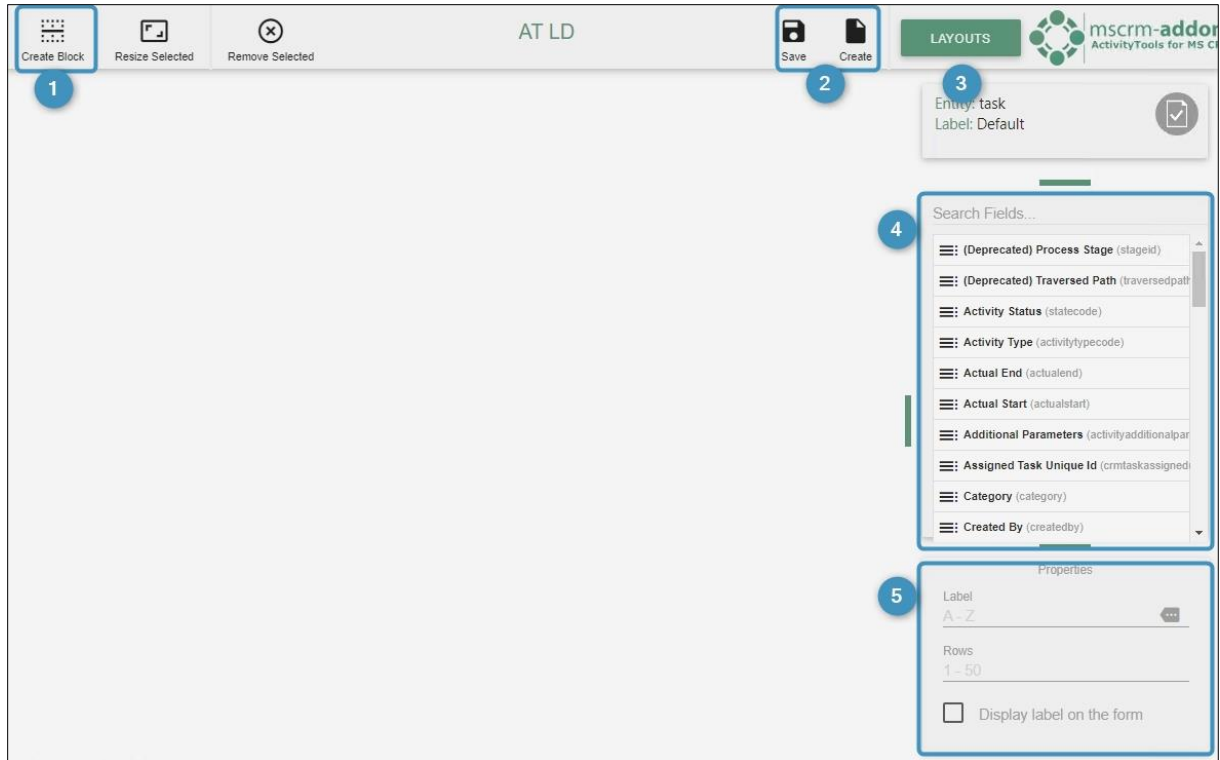


Figure 46: Layout Designer customization

1 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.

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

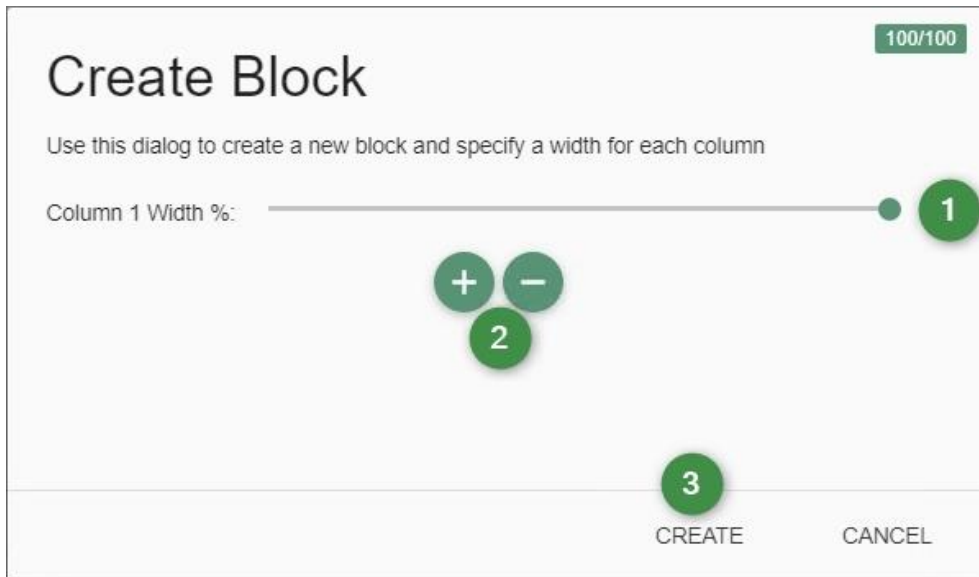


Figure 47: Create Block functionality

- 1 Move the slider to determine which width you prefer for each column.
- 2 Add or remove fields.
- 3 Create a block or cancel.

Please note: 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.

2 **The Save and 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.

3 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 now.



Figure 48: Entity/Tables and Label overview

4 **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.

5 **The ActivityTools Layout Designer Properties:** In the Properties of the ActivityTools Layout Designer, you can edit your field labels in any activated Dynamics 365 language.



Figure 49: Layout Designer properties

4.3. 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.

4.3.1 Open the Entity Layouts dialog

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

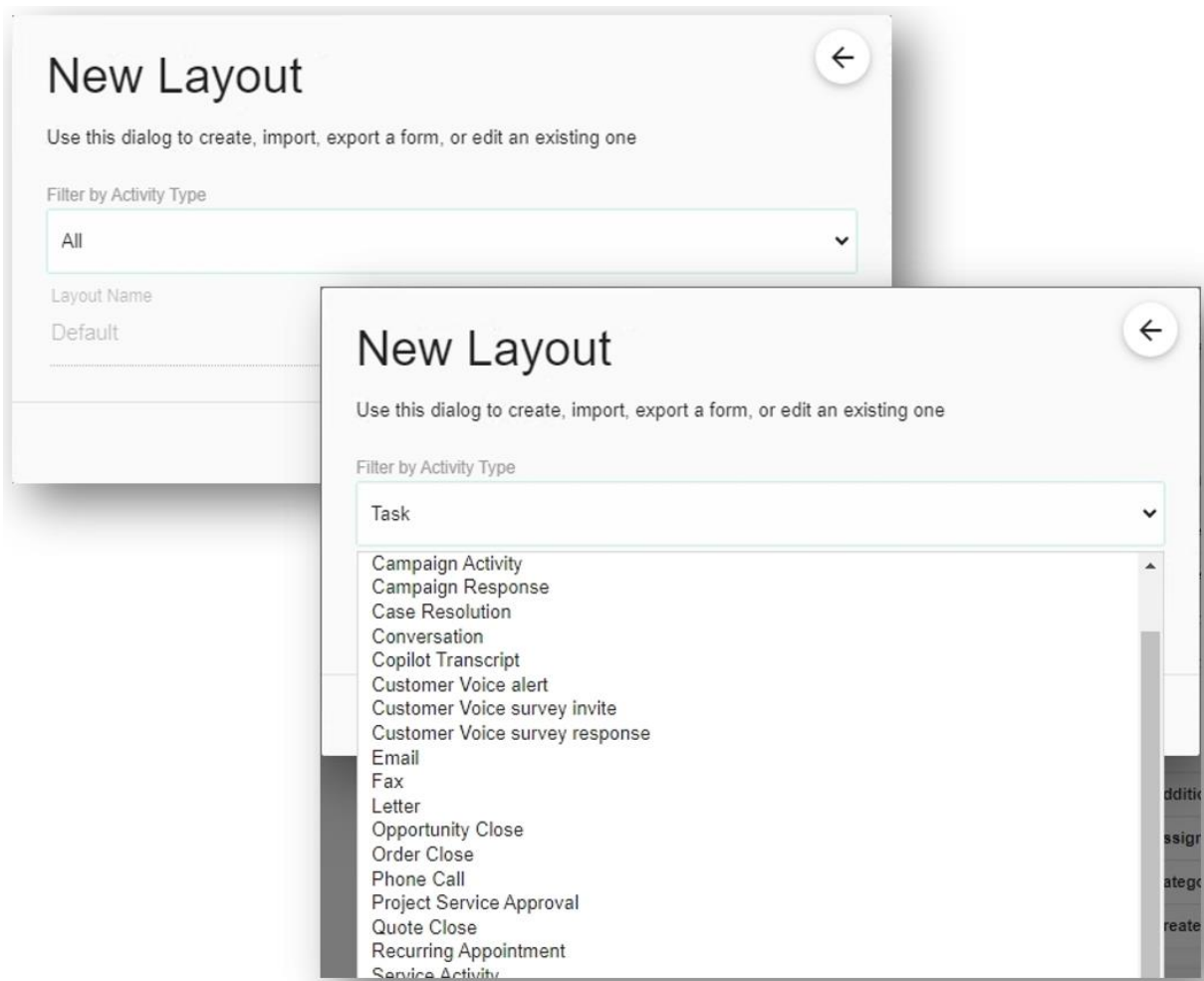


Figure 50: New Layout dialog - drop down menu

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

Please note: 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 Dynamics 365.

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.

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.

New Layout

Use this dialog to create, import, export a form, or edit an existing one

Filter by Activity Type

Task

Layout Name

Default

CREATE LAYOUT CANCEL

Figure 51: Create New Layout

5. How to activate debugging for ActivityTools

To activate debugging for ActivityTools open Dynamics 365 and navigate to **Settings** → **MSCRM-ADDONS** column → **ActivityTools**.

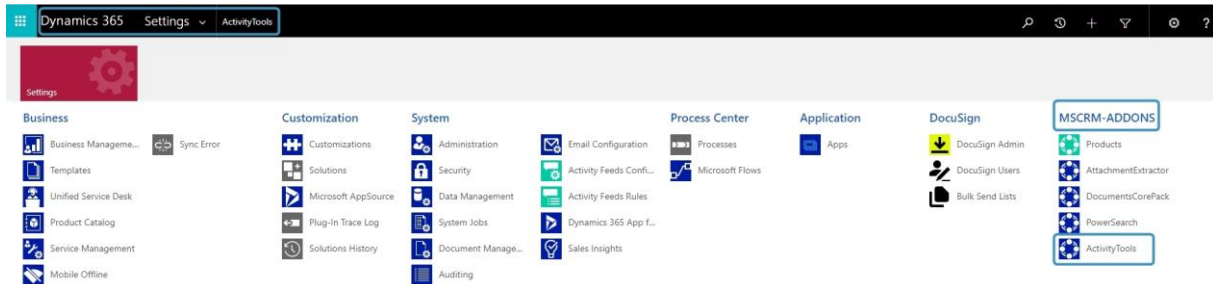


Figure 52: Dynamics 365 – MSCRM-ADDONS – ActivityTools

The ActivityTools configuration page opens. Navigate to the **General Settings** tab and Enable **Debugging**.

Please note: Do not forget to **Save the Configuration!**

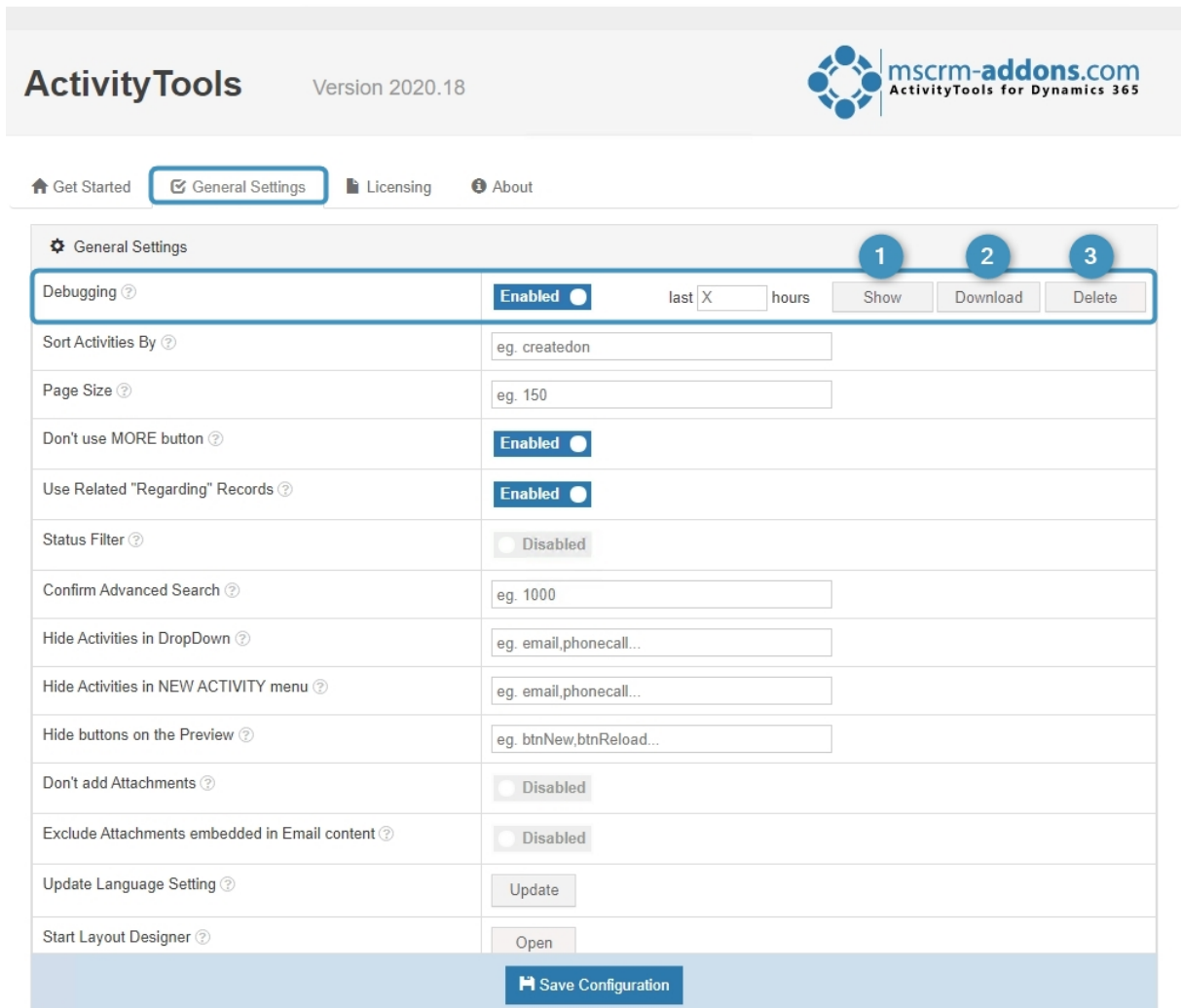


Figure 53: Enable Debugging

Once activated, you can use the buttons at the right side to modify the debugging process.

1 Show button: Displays all logs that were generated during the last x hours.

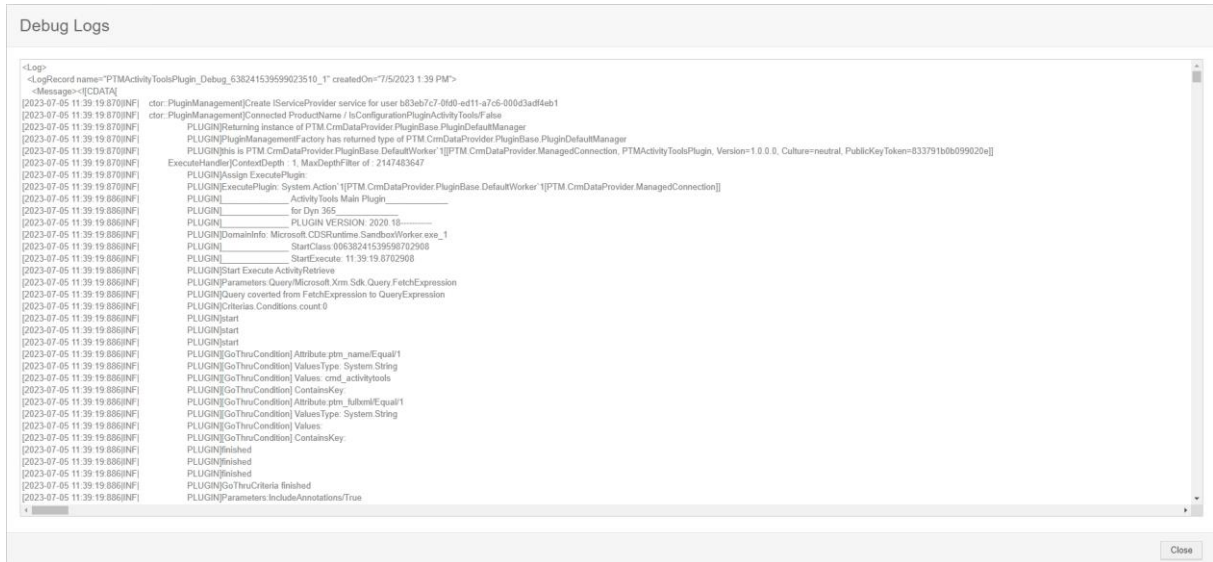


Figure 54: Show button - Debug Logs

2 Download button: Download the log file in .xml

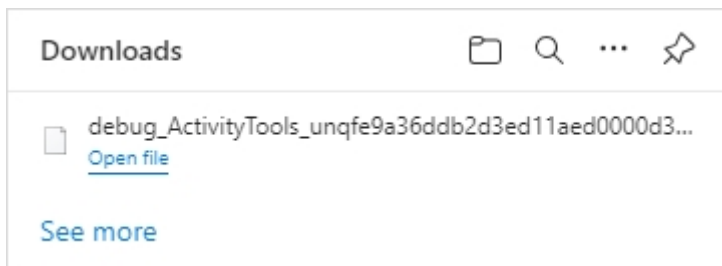


Figure 55: Download log file in .xml

3 Delete button: Delete the log files.

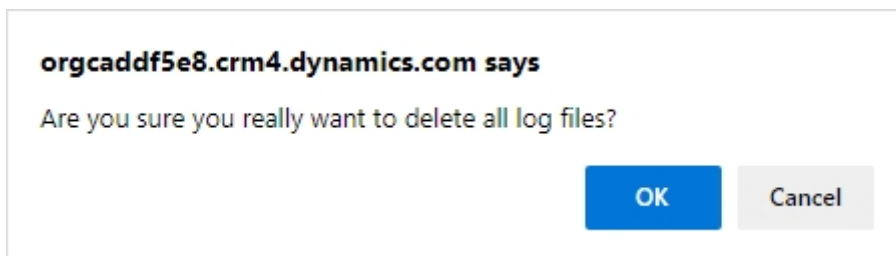


Figure 56: To delete log files, confirm with ok

6. How to uninstall ActivityTools

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

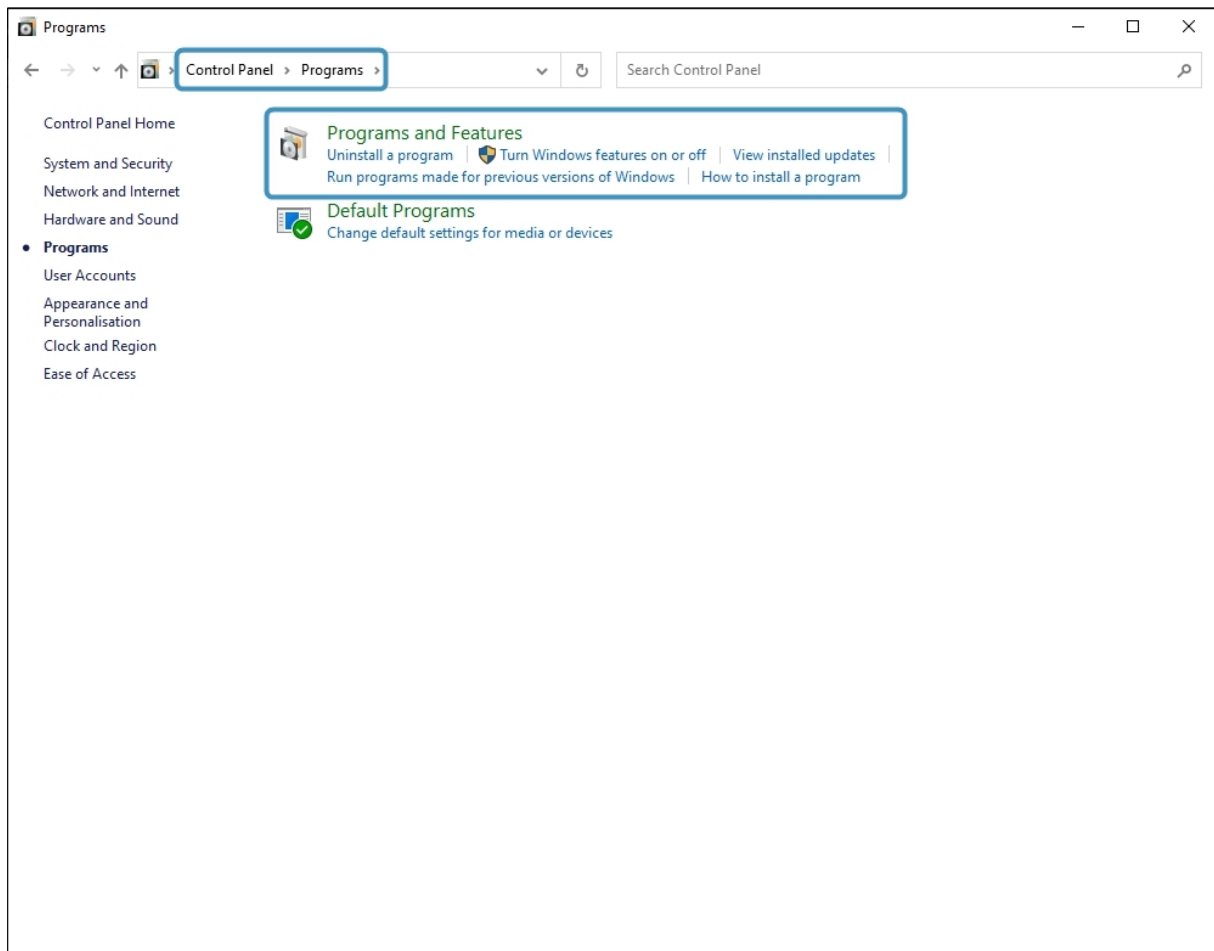


Figure 57: Uninstall ActivityTools with control panel

Select Uninstall a program and look for ActivityTools.

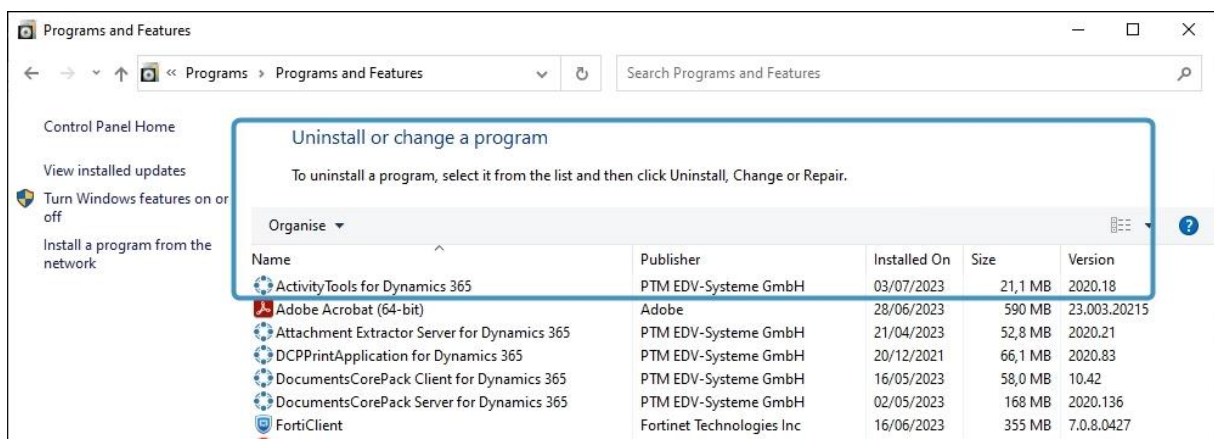


Figure 58: Uninstall a program

If you are sure, that you want to uninstall, then confirm with **Yes**.

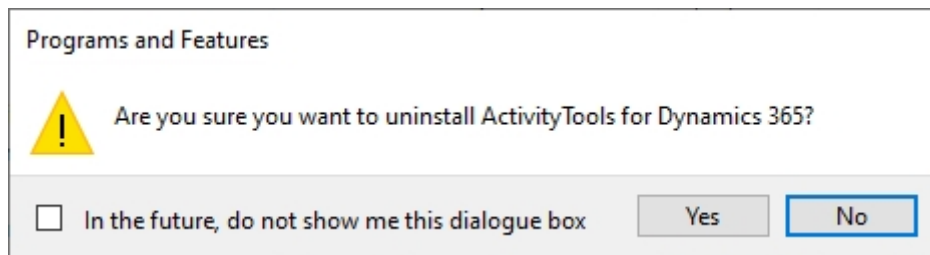


Figure 59: Confirm uninstall

7. Tutorials (How to's)

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

7.1. How to edit/delete existing layouts

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

- 1 The pencil symbol stands for **edit** and.
- 2 The garbage bin stands for **delete**.

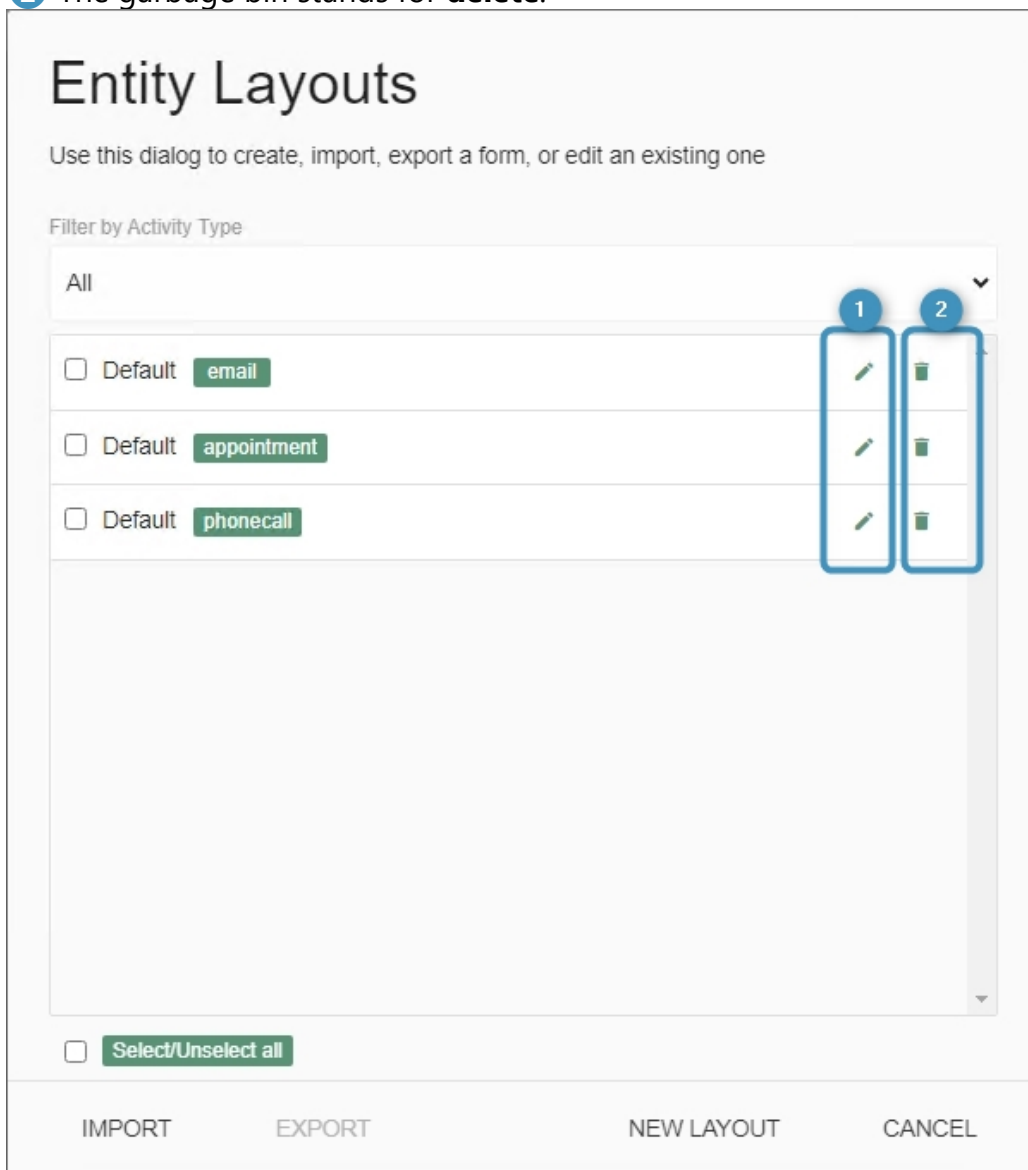


Figure 60: Edit or delete Entities/tables

7.2. How to customize fields

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

7.2.1 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. Don't forget to **Save** the new Layout.

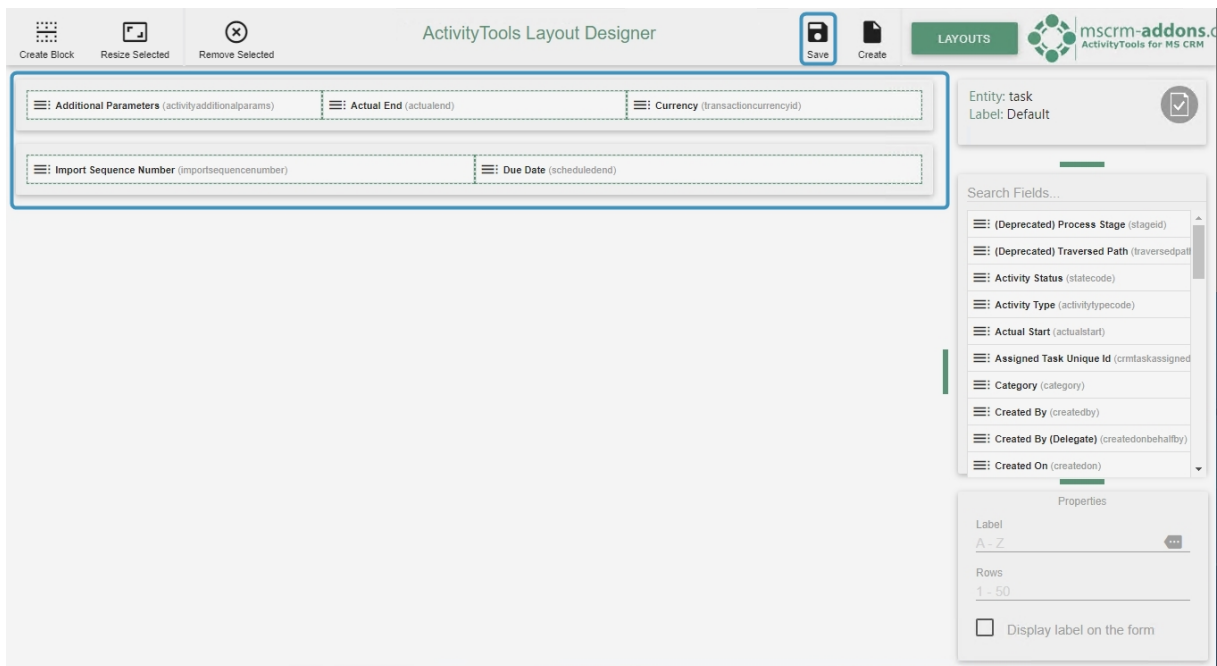


Figure 61: Layout Designer - drag & drop

When we open our ActivityTools Preview window it looks like this:

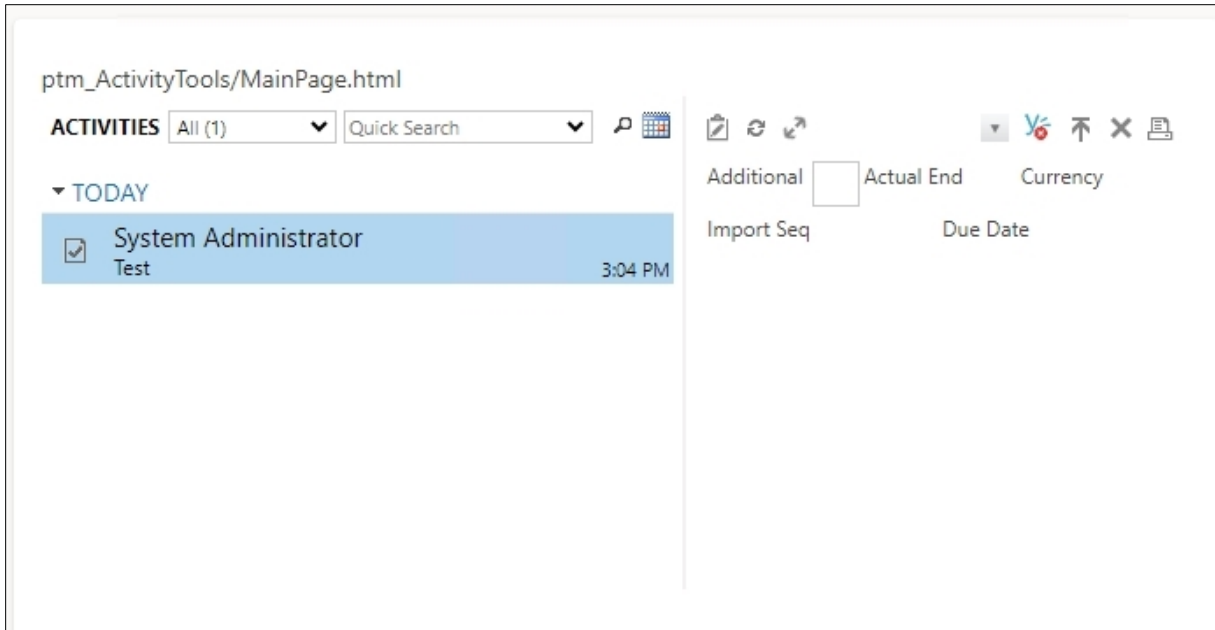


Figure 62: Layout design ActivityTools

Please note: 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.

7.2.2 How to remove fields

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

To remove a field, select the field and simply click on the **1 Remove Selected** button. A window pops up. Please confirm Removal.

Then press the **Save** button. For demonstrating purposes, we remove the field **Actual End**.



Figure 63: Confirm removing a field

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

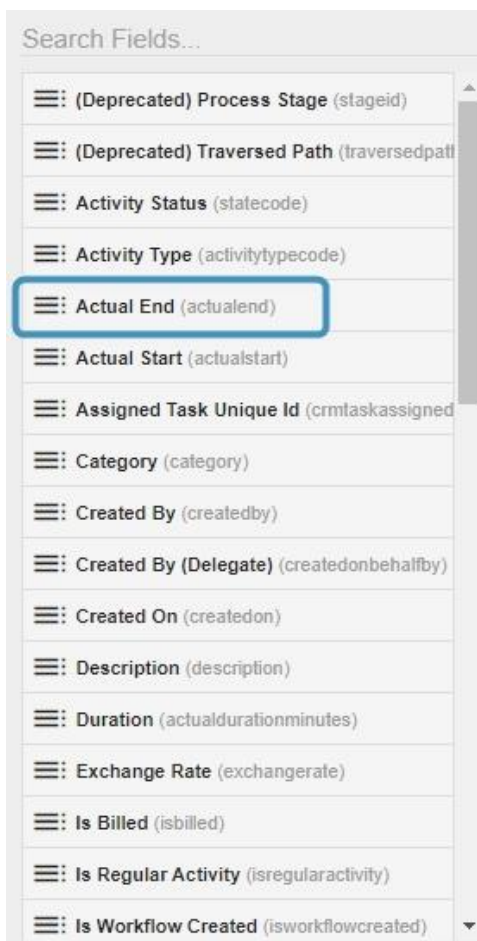


Figure 64: Removed field back in the fields section

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



Figure 65: Also removed from ActivityTools preview

7.3. 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 66: Change field language

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

Field Labels

Use this dialog to edit your field labels in any activated crm language

English (United States)
Currency

French (France)
Devises

German (Germany)
Wahrung

SAVE CANCEL

Figure 67: Select language

Click in the field you would like to rename and overwrite the existing term. Do not forget to press the **Save** button to proceed properly.

Field Labels

Use this dialog to edit your field labels in any activated crm language

English (United States)
 X|

French (France)
Devis



German (Germany)
Währung

SAVE CANCEL

Figure 68: Rename Field

Please note: You can only change a field language if the language is also activated in your Dynamics 365 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.

ActivityTools Layout Designer
 Save  Create LAYOUTS

☰: XXXXX (transactioncurrencyid)

☰: Due Date (scheduledend)

Figure 69: Renamed field

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.

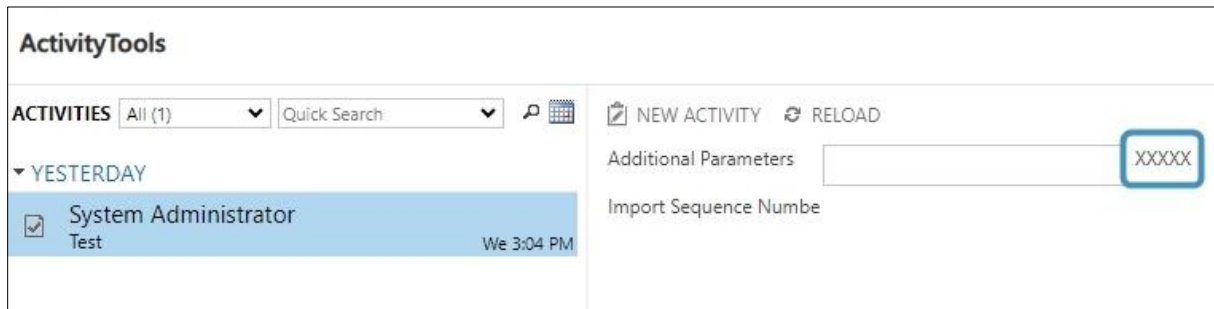


Figure 70: ActivityTools preview with changed name

7.4. 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.

To export a layout, please check the one you would like to export in the **1 Entity Layoutsdialog** and press the **2 Export** button. For demonstrating purposes, we export the default layout Task.

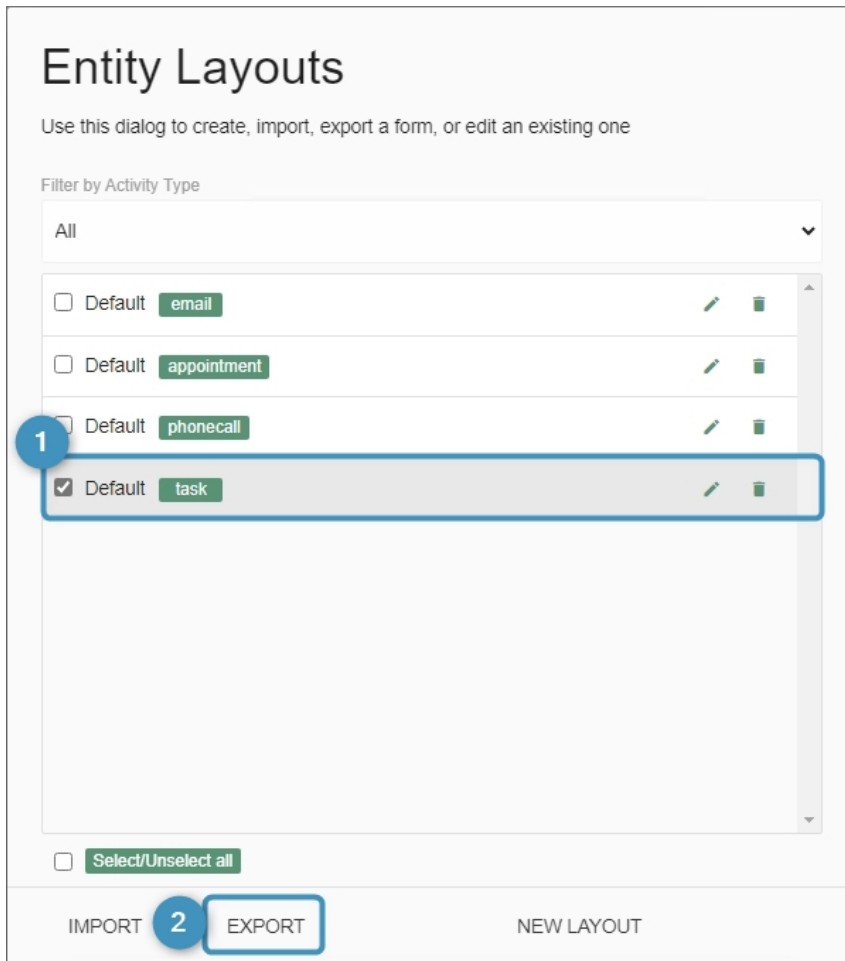


Figure 71: Export a layout

Please note: Save the created file in a save location you remember. You might want to reimport again.

7.5. How to import a Layout

Of course, you can also import your layout. it is just as easy to trade.

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.

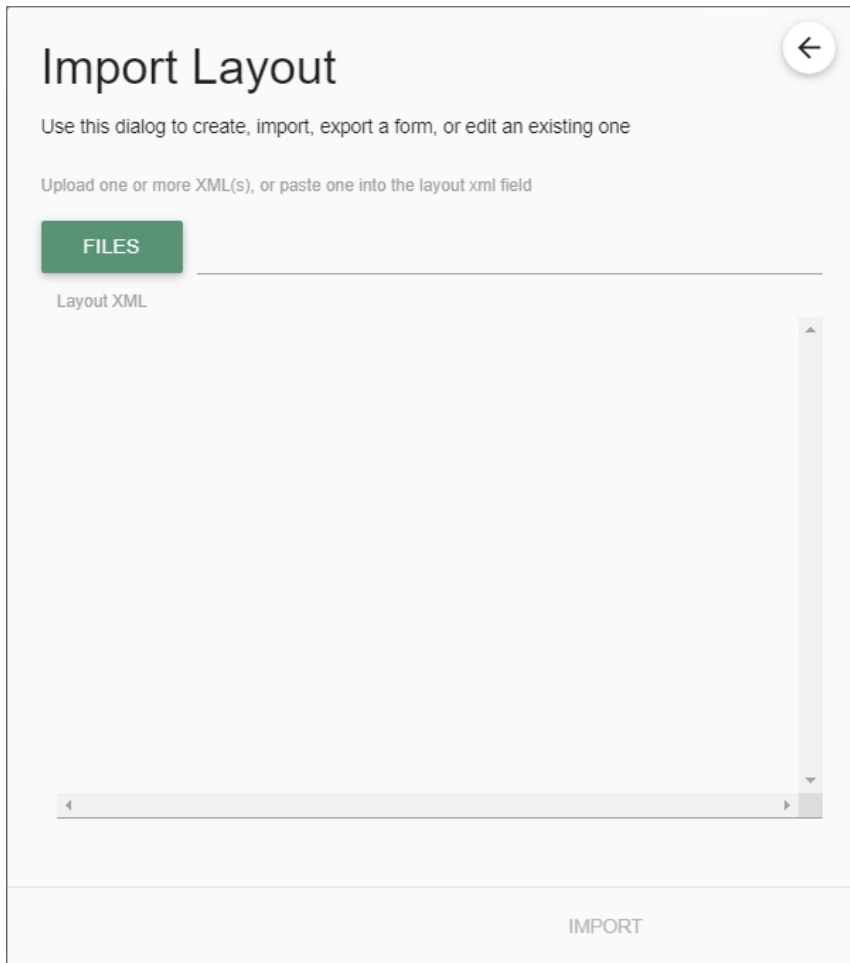
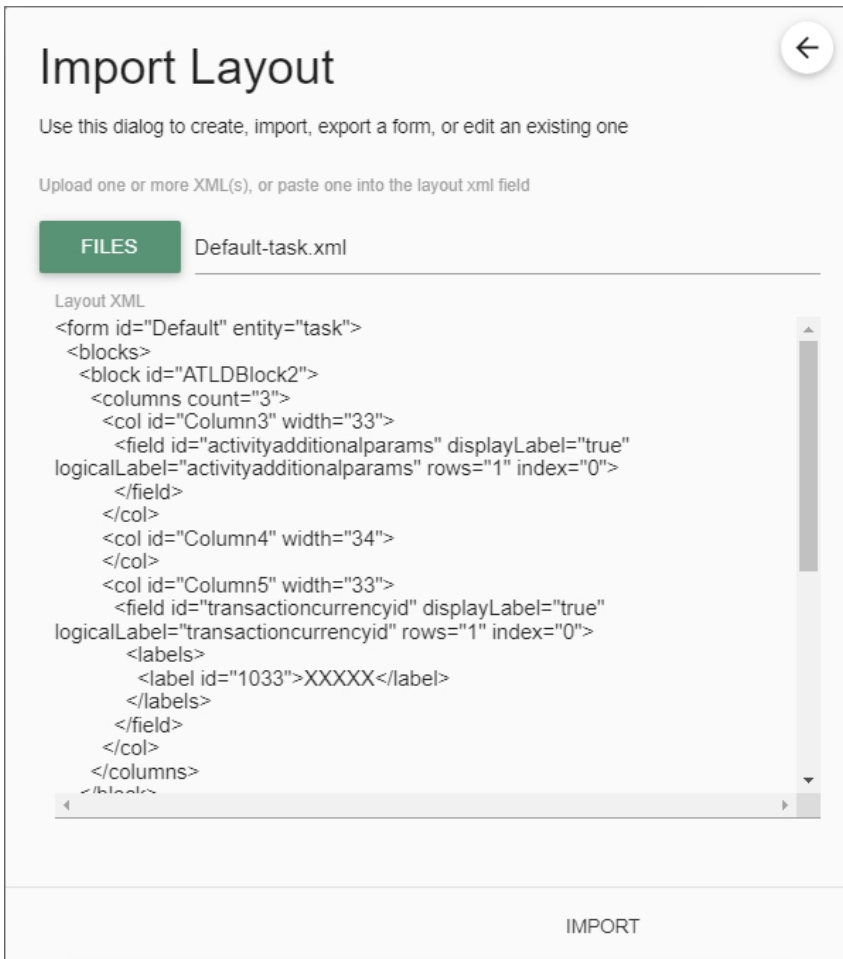


Figure 72: Import Layout

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.



Import Layout

Use this dialog to create, import, export a form, or edit an existing one

Upload one or more XML(s), or paste one into the layout xml field

FILES Default-task.xml

Layout XML

```
<form id="Default" entity="task">
  <blocks>
    <block id="ATLDBlock2">
      <columns count="3">
        <col id="Column3" width="33">
          <field id="activityadditionalparams" displayLabel="true"
logicalLabel="activityadditionalparams" rows="1" index="0">
            </field>
          </col>
          <col id="Column4" width="34">
            </col>
          <col id="Column5" width="33">
            <field id="transactioncurrencyid" displayLabel="true"
logicalLabel="transactioncurrencyid" rows="1" index="0">
              <labels>
                <label id="1033">XXXXX</label>
              </labels>
            </field>
          </col>
        </columns>
      </block>
    </blocks>
  </form>
```

IMPORT

Figure 73: Import Layout .xml file

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