



Activity Timeline for Microsoft Dynamics® CRM



Version 1.0

Last Updated: Jan 2018

Copyright ©2018 Soluzione IT Services Pvt. Ltd. All rights reserved

Table of Contents

Overview	3
Installing Activity Timeline Solution	3
How to Activate the Trial?	3
How to Configure the Activity Timeline?	3
Support.....	5

Overview

Dynamics CRM provides an activity pane which is an amazing placeholder to display all customer interactions in one place. But it has its own limitations, many times, we want the users to view activities but while adding we want to capture few more fields, for example, adding a custom follow-up field on task or showcasing the activities in more interactive manner.

Soluzione's activity timeline is a vertical timeline view which enables you to see activities and notes in a single pane. We have provided different colours for different activity types which are eye-catching and users are able to differentiate activities very easily. Being a web resource, we are able to customize the behaviour and add additional fields.

The integration is available for Microsoft Dynamics CRM Online and is supported for the following version

- Dynamics CRM Online (version 8.2 or above)

If you need to install the same on an on-premise instance or any other version, please contact us at info@solzit.com.

Installing Activity Timeline Solution

The activity timeline solution trial can be obtained from Microsoft AppSource or you can contact us for the same at info@solzit.com. The solution can only be installed by Microsoft Dynamics CRM administrators or by users with administrative privileges for Microsoft Dynamics CRM.

How to Activate the Trial?

Once the Activity Timeline solution is installed in your Dynamics CRM environment, activating trial is a very easy task, it includes just a few steps.

Step 1:

- Open on Activity timeline solution (from solutions grid) and go to the configuration page of Solution.
- On the Configuration page click on the Activate Trial button.

Step 2:

- When you click on Activate trial, the Customer Registration form will open which will require all your organizational and CRM details.
- Fill all the details in the form and click on Submit.

Step 3:

- To verify trial activation, refresh the "Configuration Page". It should now have details like trial end date, license key etc.

How to Configure the Activity Timeline?

Configuring activity timeline is extremely simple and straight forward. Go to the form where you want to place the activity timeline. Open the form editor and insert the web-resource. Select the web resource "solz_activitytimeline.html". Normally give it around 18-20 rows of space in the Formatting section. Save and publish the form. Remember you might need system customizer privileges to do the same.

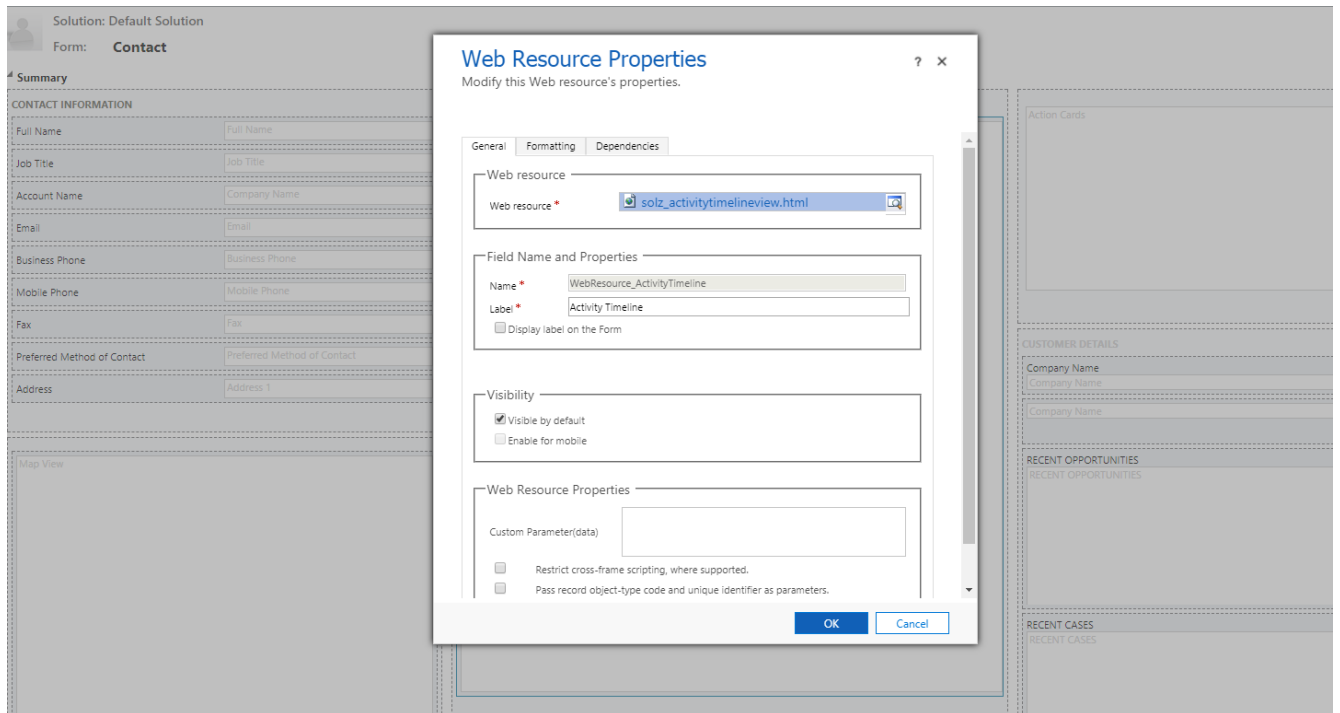


Figure: Insert Web Resource

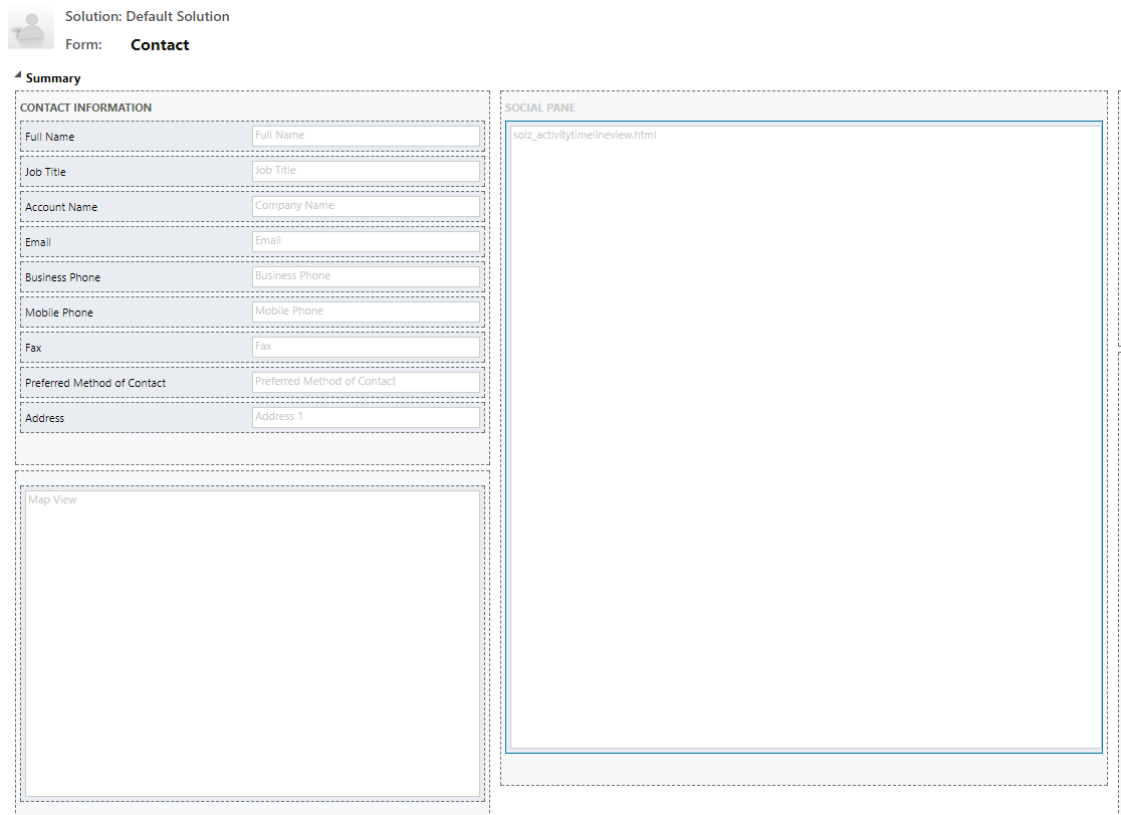


Figure: Activity Timeline web resource inserted in form editor.

Add the users to security role **“SolzIT CRM AddOn Subscription Reader”** that needs access to Activity Timeline.

You should now see the activities in the new activity timeline as below.

The screenshot displays the Dynamics 365 interface for a contact named David Cole. The top navigation bar shows 'Dynamics 365 Sales > Contacts > David Cole'. Below the navigation, there are action buttons: NEW, DEACTIVATE, CONNECT, ADD TO MARKETING LIST, ASSIGN, EMAIL A LINK, DELETE, FORM, and PROCESS. The contact's name 'David Cole' is shown with a profile icon and a hamburger menu. The 'Summary' section is expanded, showing 'CONTACT INFORMATION' with fields for Full Name (David Cole), Job Title (Coach), Role (Customer), Account Name (Trainers League), Email (david23.cole@test.com), Business Phone, Mobile Phone, Fax, Preferred Method of Contact (Any), and Address. Below the information is a map with a Bing logo and a message: 'The specified credentials are invalid. You can sign up for a free developer account at http://www.bingmapsportal.com'. To the right, the 'Activity Timeline' is visible, showing three activities from December 2017: a call on 18-Dec-2017 18:49 by CRM Admin (Open), a document sent on 18-Dec-2017 18:48 by CRM Admin (Active), and a text message on 12-Dec-2017 13:22 by CRM Admin (Draft).

Figure: Activity Timeline on contact form

Support

In case you need support and help with Activity Timeline, please feel free to contact us at support@solzit.com