



Dynamics 365 / CRM / XRM Platform



User Guide



**CRM Versions Supported:
2013 and D 365**

Activity Timer is a Dynamics 365 / CRM add-on which allows automatic or manual collection of time involved in the performance of CRM Activities. As CRM Activities are opened and closed, the time can be monitored for use in billing or analysis. The time tracking can be started and stopped as needed for periodic work against a long-term Task or applied to an automatic function like a bulk template created e-mail.

| | |
|------------------|-----------------------|
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Introduction

It's a simple add-on to the Microsoft's Dynamics CRM 2013 and CRM Online platforms adds immediate value to any Dynamics CRM solution by accurately tracking and reporting exact time for all CRM Activities by all CRM users. Ideal for any business that would benefit from accurate actual time capture.

Activity Timer adds timer functionality to all Dynamics 365 / CRM Activity types including the Task, E-mail, Fax, Phone Call, Letter, Appointment, Service, or Campaign activities. **Works as a stopwatch** within the Open Activity form with start and stop continuous and cumulative timing ability. **Administrator settings** allow Dynamics 365 / CRM Activities to optionally be set to a fixed time application function with a pre-defined increment of time upon closing the Activity.

Fixed times applications include template based E-mails, standardized Fax, or bulk letter mailing time charges and greatly save User overhead time. A Fixed time could be applied to a Phone Call Activity to function as a minimum time charge for uncompleted calls and upon a conversation starting the Activity Timer can be manually started to override the fixed time with the actual call duration.

An **"Auto" function setting** allows automatic starting and stopping upon Open and Close of the selected Activity types which greatly reduces User time tracking errors and enhances professional productivity. Actual Timed Duration field added by this option is available in CRM Activity and History Views, forms, and custom reports. This utility is sold with Per User Licensing equal to the number of Dynamics CRM Licenses enable

Better CRM Activity time tracking makes for better client relations and that makes for greater revenue realized.

The Activity Timer can be applied to the following Activity Types only

- ▶ Task
- ▶ Letter
- ▶ E mail
- ▶ Fax
- ▶ Phone Call
- ▶ Appointment
- ▶ Service Activity



License Key

- To install Activity Timer you will require License key, which you can get by sending an email requesting license key to salesteam@mtccrm.com with your **Organization Unique name**.
- To access your Organization Unique name click on Settings→Customizations→Developer Resources as shown below figure

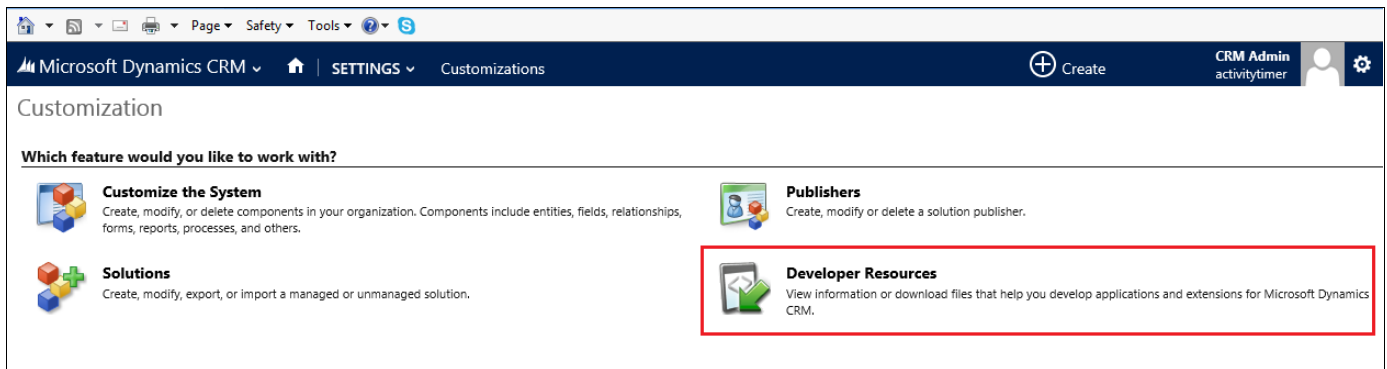


Figure 1: Developer Resources

- A window will pop up with Organization Unique Name as shown below.

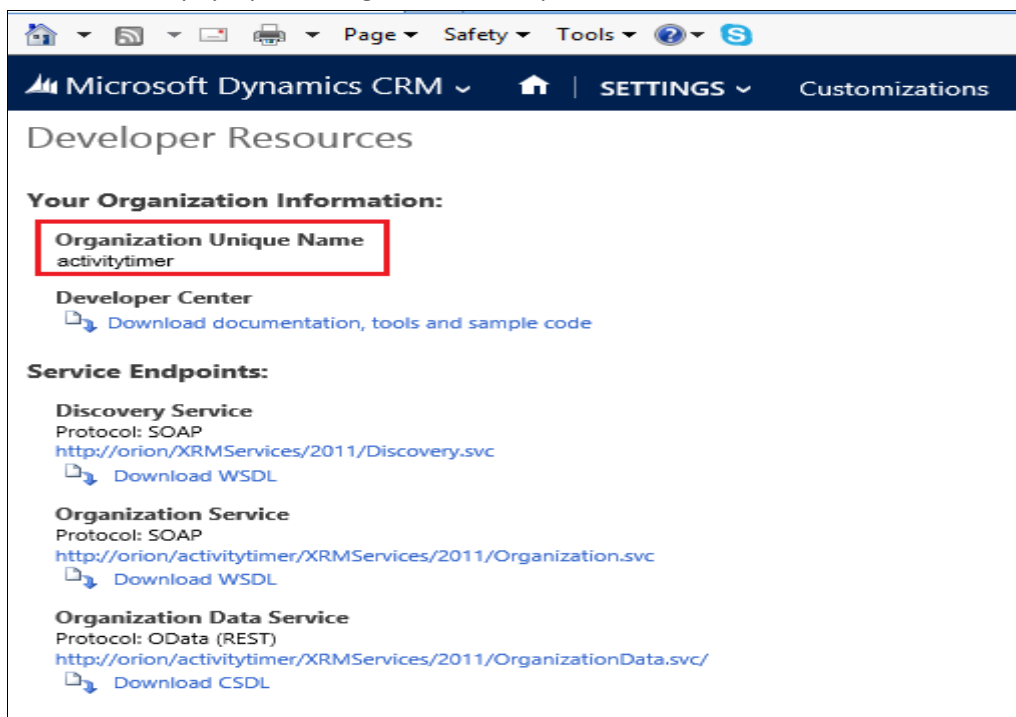


Figure 2 : Organization Unique Name

NOTE: After placing the request you will receive the LICENSE KEY within 24 hrs.



Installation Process

To install the Activity Timer the following steps have to be followed

STEP 1:

- Go to <http://www.dynamicsexchange.com/AT.aspx> click on Download to get Solution

STEP 2:

- On Downloading you will get **ActivityTimer.zip** (ZIP file).

STEP 3:

- Open your CRM click on Settings→Solution→Import it will open import Solution window.

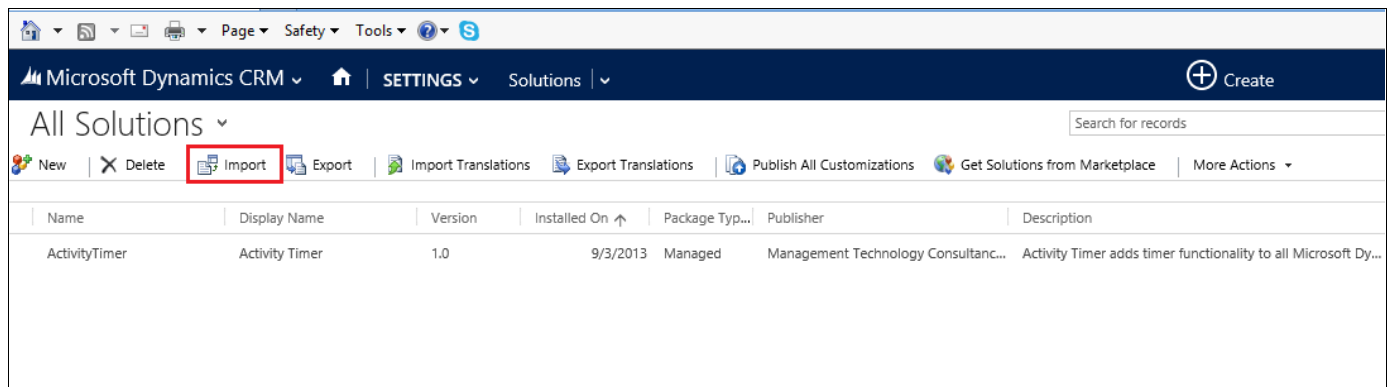


Figure 3 : Import Solution

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.

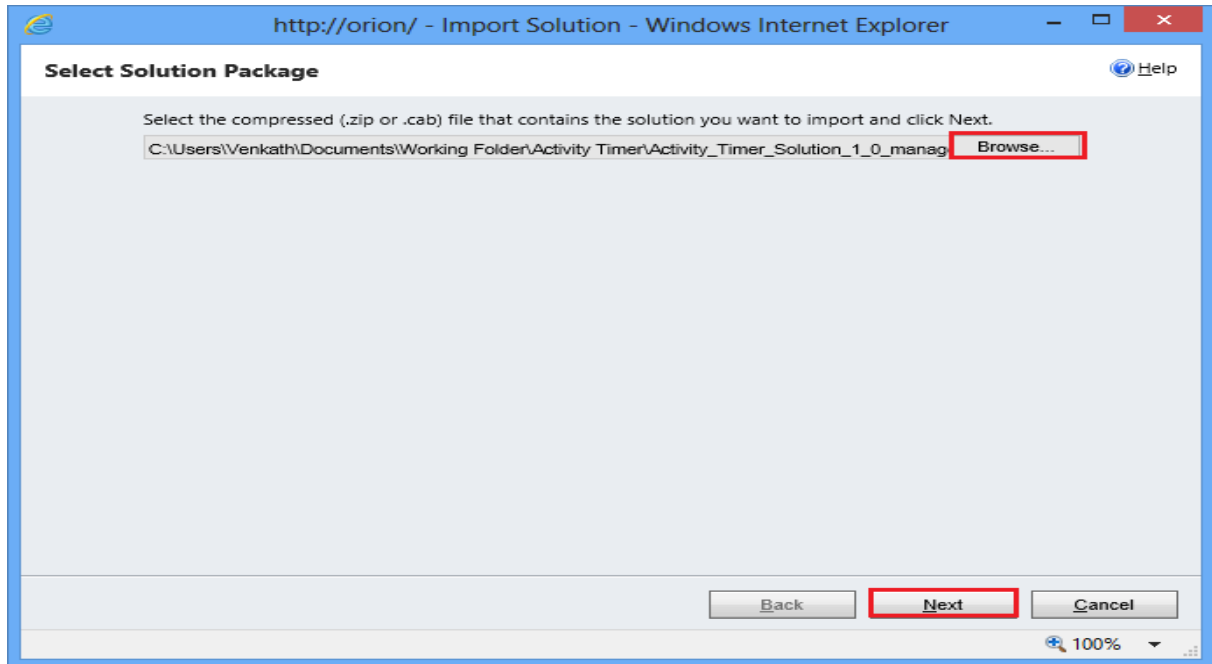


Figure 4 : Select Solution Package

- Click on next until it is finished and finally click on close.

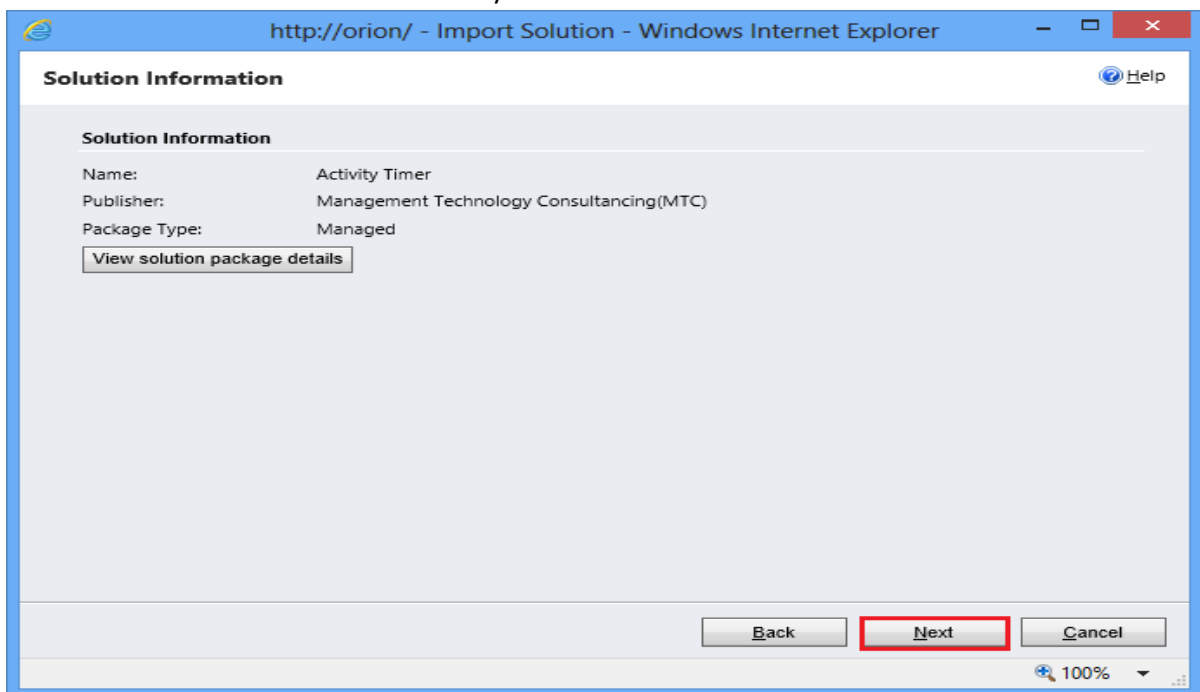


Figure 5: Solution Information

- Select the Check Box which comes in between as “Activate any process and enable any SDK message processing steps included in the solution.” Press Next to continue.

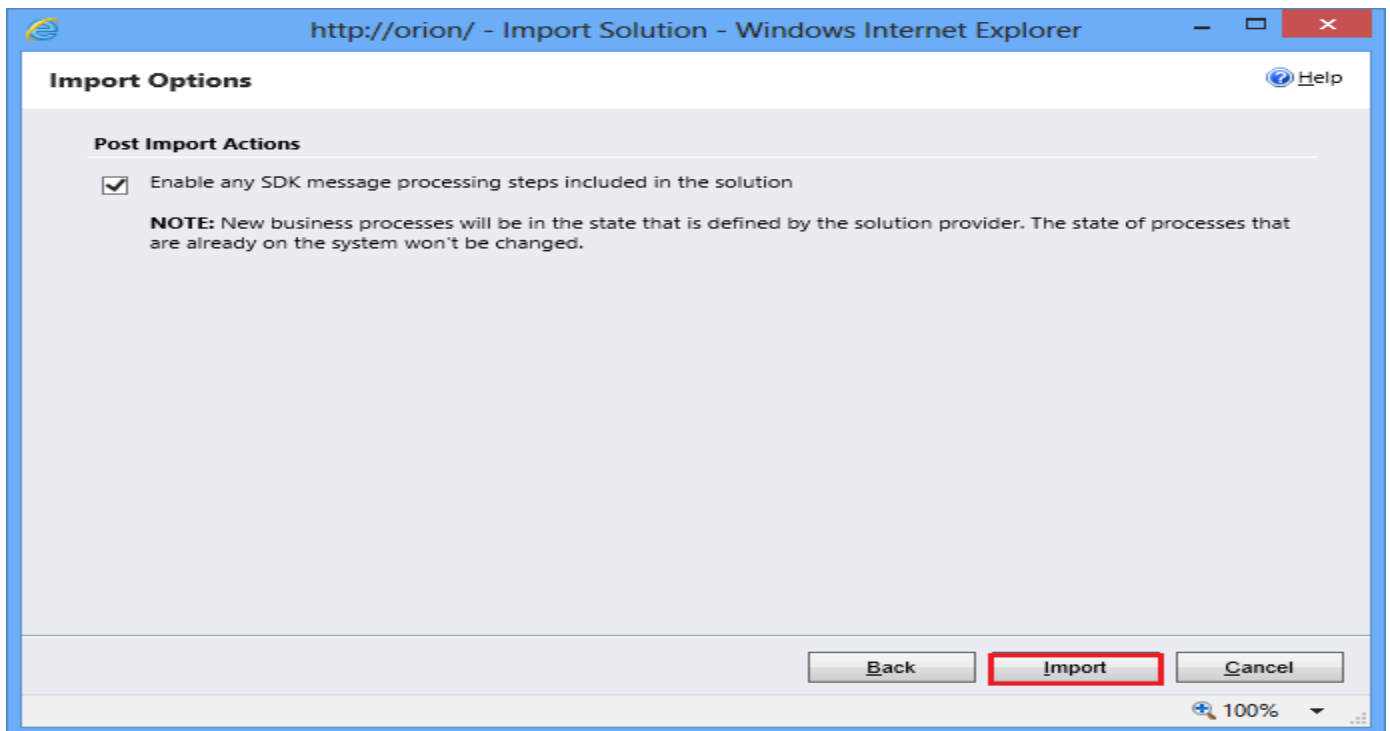


Figure 6: Import Options

- Click on next it will open importing solution window in that dialog will be opened displaying the message importing the customization please wait for the operation to complete.

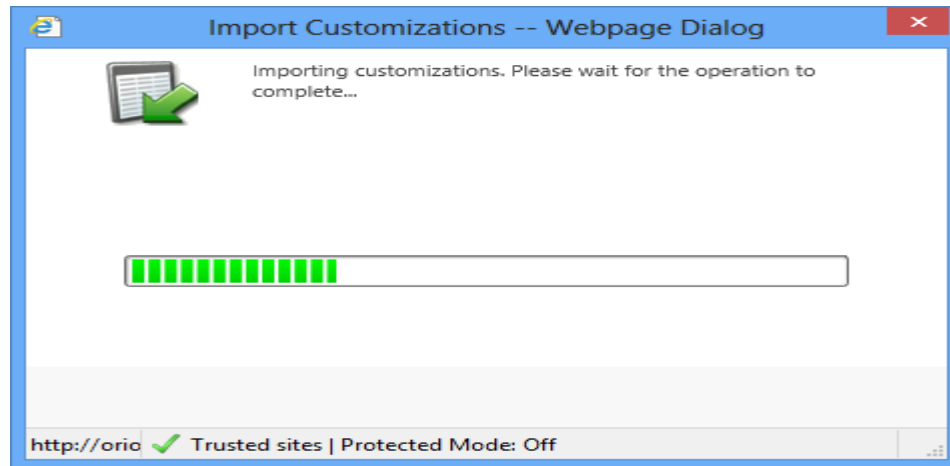


Figure 7 : Solution imported

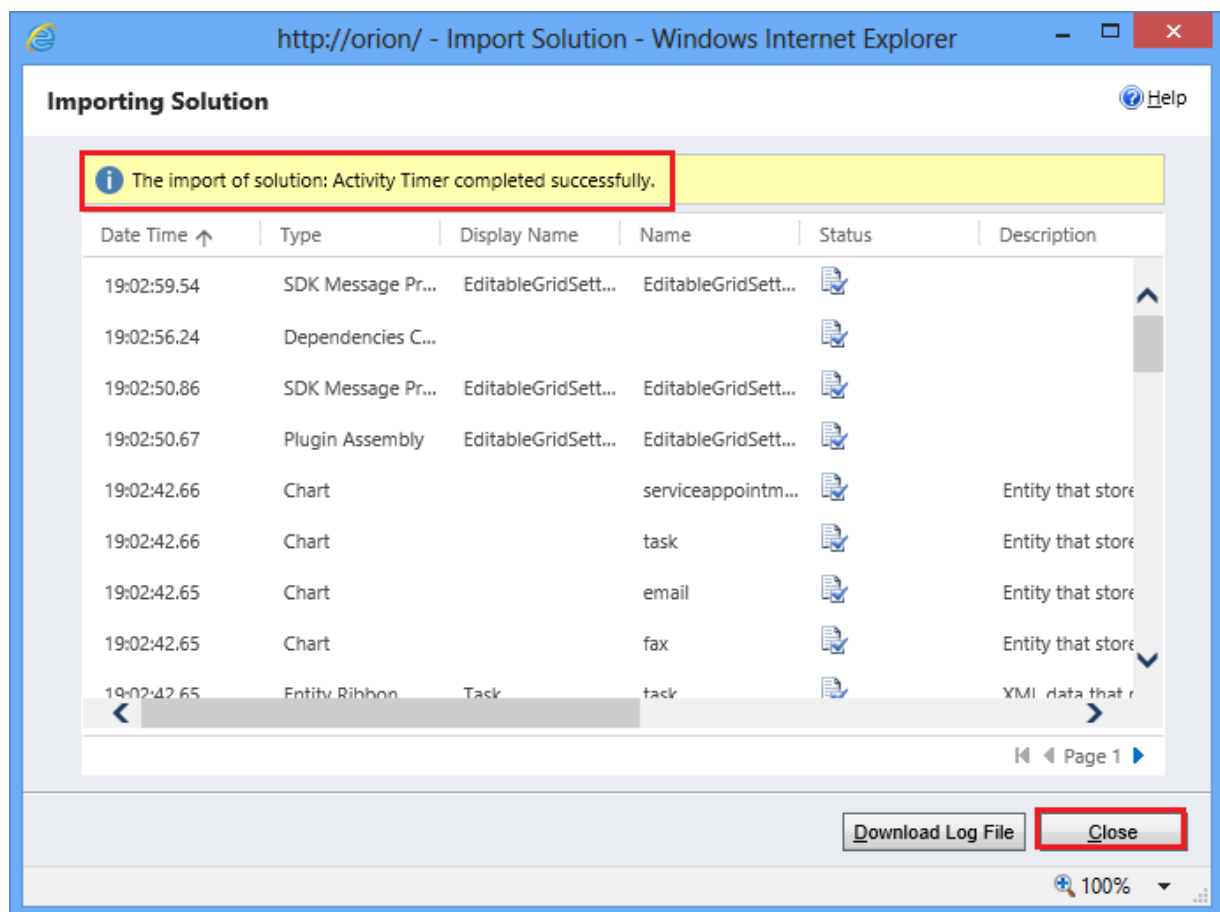


Figure 8: Solution Installed successfully



STEP 4:

- After importing the Activity Timer Solution you need to place the License key, navigate to settings→solution→Click on Activity Timer solution
- Select Licensing option

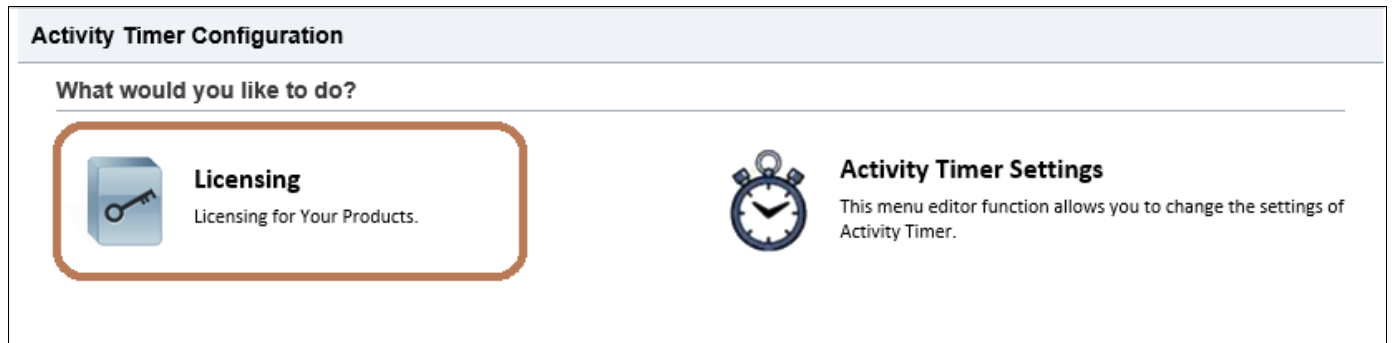


Figure 9: Select Licensing

STEP 5:

- Select the product as Activity Timer
- Enter the LICENSE KEY which you have received after placing the request press the tab to enable Submit button and click on Submit then a pop up window appears and displays the message License Accepted. Click on OK.

Figure 10 : Placing the License key



- As soon as the uploading is completed it starts reflecting in CRM as shown

| Name | Display Name | Version | Installed On | Package Type | Publisher | Description |
|-----------------|----------------|---------|--------------|--------------|-------------------------------------|--|
| ✓ ActivityTimer | Activity Timer | 1.0 | 9/12/2013 | Managed | Management Technology Consultanc... | Activity Timer adds timer functionality to all Microsoft Dy... |

Figure 11 : Solution Window



Dynamics 365 Solution - Trial License Activation/ Product License Purchase/ Additional User License Purchase

Please refer the below link for Trial License Activation and/or Product License Purchase and/or Additional User License Purchase for MTC's Dynamics 365 Solution.

<https://www.mtccrm.com/PLI>

In case of queries or issues, please write down to salesteam@mtccrm.com for quick help.



Activity Timer Settings

This menu editor function allows you to change the settings of Activity Timer
Settings allow Solution-wide Timing Function Control that includes:

- *Stopwatch started and stopped by User for a larger Task.*
 - *Stopwatch started on open, stopped and recorded by close.*
 - *User start/stop Override at Task Level.*
 - *User Time Override at Task Level.*
 - *Automatic Fixed-Time for instant Activities i.e. bulk emails, letters and fax.*
 - *Hide or Show Stopwatch time appearance in CRM Activity.*
- To view the Activity Timer Settings go to **Settings→Solutions→ActivityTimer** a webpage will open as shown **Click on Activity Timer Settings**



Figure 12: Activity Timer

- A window would be opened similar to the one below showing the **settings of the timer**.



| Activity Timer Settings | | | | | | |
|-------------------------|---|-------------------------------------|-------------------------------------|--|-------------------------------------|--|
| | Activity Type  | Auto Timer | Notes | Fixed Time  | Display Timer | |
| | Task | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | |
| | EMail | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | |
| | Fax | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | |
| | PhoneCall | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | |
| | Letter | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | |
| | Appointment | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | |
| | Serviceappointment | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | |

Figure 13: Activity Timer Settings Area

- For Example If you want **to have Auto Timer on your activity window click on the check box** of that particular setting of your preferred activity type. Finally click on Save button

Auto Timer:

- Starts when the activity is opened and records the time as soon as the activity is saved/closed.

Notes:

- Enables entering a record Note upon stopping the timer to record reasons for timer start/stop.

Fixed Time:

- A fixed amount of time can be applied to the use of the Activity regardless of actual duration. Ideal for automatic template emails, faxes, letter.

Display Timer:

- Enables display of the timer on header of the Activity.
- You can set the settings in the activity timer as per your requirements and then Click on Save.



How to Use Activity Timer?

Auto Timer:

- For example select the 'Task' from the Activity Type and check the 'Auto Timer' and the 'Display Timer' .If you have selected the 'Auto Timer' the clock starts running automatically as soon as you open the form and display timer shows the clock. Click on save. A pop up will come displaying "Settings Saved"

| Activity Type | Auto Timer | Notes | Fixed Time | Display Timer |
|---|-------------------------------------|--------------------------|------------|-------------------------------------|
| <input checked="" type="checkbox"/> Task | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> EMail | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| <input type="checkbox"/> Fax | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| <input type="checkbox"/> PhoneCall | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| <input type="checkbox"/> Letter | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| <input type="checkbox"/> Appointment | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| <input type="checkbox"/> Serviceappointment | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |

Save

Figure 14: Auto Timer

- To see the Functioning of the Auto Timer go to workplace→Activities select an existing task or a new task from the activities you can see the timer on the top of the form starting automatically when you open the form as shown

Microsoft Dynamics CRM | SALES | Activities | New E-mail | Create

SEND | SAVE | ATTACH FILE | INSERT TEMPLATE | INSERT ARTICLE

E-MAIL : INFORMATION

Start | 0 Days | 0 Hrs | 0 Mins | 37 Secs | Pause | Reset

At least one recipient does not have an email address or is marked as "Do Not Allow" email.

From: CRM Admin

To: --

Cc: --

Bcc: --

Subject: --

Regarding: --

Rich text editor toolbar: Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Insert Template, Insert Article

Figure 15: Task Window



- When you click on Pause, you can see the duration in the **“Duration”** Field as shown in the above window.

Notes

- For example select the **‘Task’** from the Activity Type and check the **‘Notes’** and the **‘Display Timer’** .If you have selected the **‘Notes’** the notes window would be opened only for the saved records you can enter the text of your requirement and can save it. Display timer shows the clock. Click on save. A pop up will come saying **“Settings Saved”**

| Activity Timer Settings | | | | | |
|-------------------------|--------------------|--------------------------|-------------------------------------|------------|-------------------------------------|
| | Activity Type | Auto Timer | Notes | Fixed Time | Display Timer |
| | Task | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> |
| | EMail | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| | Fax | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| | PhoneCall | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| | Letter | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| | Appointment | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| | Serviceappointment | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |

Figure 16 : Auto Timer Notes

- In order to have a view how the NOTES works go to workplace->Activities-> select an existing task or a new task from the activities. If you have selected the new task first enter the required details and save the task.
- Now start the timer (if you didn’t select the Auto Timer in settings area) as shown

Microsoft Dynamics CRM | SALES | Activities | New Task Test | Create | CRM Admin activitytimer

MARK COMPLETE | CLOSE TASK | CONVERT TO | DELETE | EMAIL A LINK

TASK : INFORMATION

New Task Test

Start | 0 Days | 0 Hrs | 2 Mins | 0 Secs | Pause | Reset

Task

Subject * New Task Test

Regarding --

Owner * CRM Admin

Duration 2 minutes

Priority Normal

Due --

Category --

Sub-Category --

Notes

NOTES

Enter a note

Figure 17 : Start Timer

- Pause the timer now you will get a window as shown

-- Webpage Dialog

Enter Your Notes Here

Save Cancel

Figure 18 : Notes Webpage Dialog

- Enter the text as per your need and then click on the Save button, the notes and the details will



be saved.

- You can see the notes details on your activity form which is similar to the one shown here

Figure 19: Notes

Fixed Time:

- For example select the **'Task'** from the Activity Type and check the **'Fixed Time'**. Enter the details in the text box as per your need(for example here the value entered is 30). If you have selected the **'Fixed Time'** the timer on the activity windows starts from the given time which you have set in the activity timer settings. Click on save. A pop up will come displaying **"Settings Saved"**.

| Activity Timer Settings | | | | | |
|-------------------------------------|--------------------|--------------------------|-------------------------------------|------------|-------------------------------------|
| | Activity Type | Auto Timer | Notes | Fixed Time | Display Timer |
| <input checked="" type="checkbox"/> | Task | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 30 | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | Email | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| <input type="checkbox"/> | Fax | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| <input type="checkbox"/> | PhoneCall | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| <input type="checkbox"/> | Letter | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| <input type="checkbox"/> | Appointment | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| <input type="checkbox"/> | Serviceappointment | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |

Save

Figure 20: Fixed Time

- To see the working of the fixed time go to **Workplace→Activities→Open an existing task or new task** the activity timer would be displayed on the top of the form as shown. Click on start (if you didn't select the Auto Timer in settings area).The timer starts from the point of time which you have given in the activity settings area (**ex: from 30 min**) as shown



Microsoft Dynamics CRM | SALES | Activities | Task to check for Fi... | Create | CRM Admin activitytimer

✓ MARK COMPLETE ✗ CLOSE TASK CONVERT TO ✗ DELETE EMAIL A LINK ...

TASK : INFORMATION ▾

Task to check for Fixed Time option

Task

Subject * Task to check for Fixed Time option

--

Regarding --

Owner * CRM Admin

Duration 30 minutes

Due --

Category --

Priority Normal

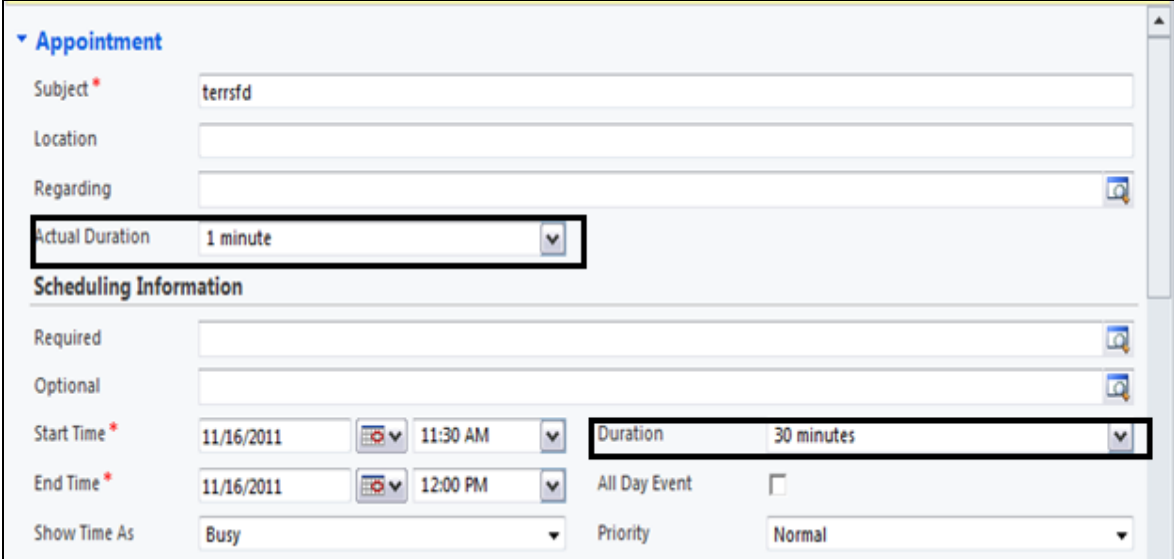
Sub-Category --

Notes

Figure 21: Showing the time in minutes

NOTE: In “Fixed Time” the time should be entered in “Minutes”.

- In **APPOINTMENT AND SERVICE ACTIVITY** the activity duration is loaded in the **Actual Duration** Field as shown below. You may have to add it manually from the form editor if it doesn't appear on the form by default.



The screenshot shows the 'Appointment' form in Microsoft Dynamics CRM. The 'Appointment' section includes fields for Subject (terrstd), Location, and Regarding. The 'Actual Duration' field is highlighted with a black box and shows '1 minute'. Below this is the 'Scheduling Information' section, which includes Required, Optional, Start Time (11/16/2011, 11:30 AM), End Time (11/16/2011, 12:00 PM), Show Time As (Busy), and Priority (Normal). The 'Duration' field is also highlighted with a black box and shows '30 minutes'.

Figure 22: Appointment& Service Activity

Actual Duration: Gives the Actual time of the activity i.e. for appointment and service activity.

Duration: Gives the duration of the appointment or service activity.

NOTE:

1. Actual Duration field can be seen only in Appointment and Service Activity.
2. The usage of Activity Timer is similar to all other Activity Types.



Removing the Activity Timer Option from the Activity Form

- You can remove the Activity Timer option from the Activity Form. Navigation for removing Activity Timer Is click on Customize→Form

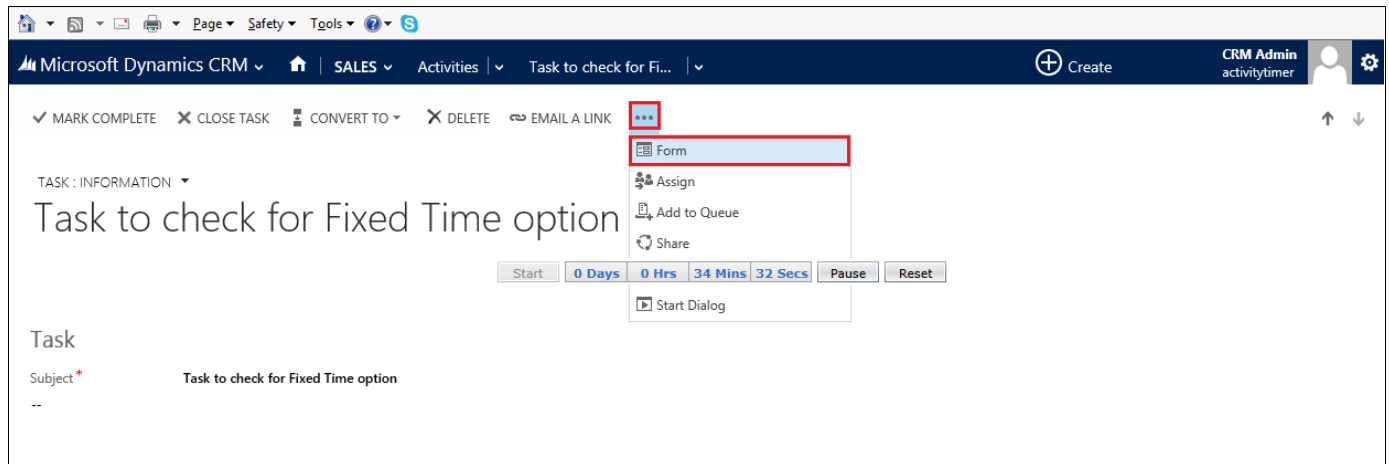


Figure 23 : Activity Timer in Email

- Form Email window will open. In that click on Header and select the file. After selecting the file only the remove button will be enabled. Click on remove button.
- Save the changes and click on publish then refresh the web page.

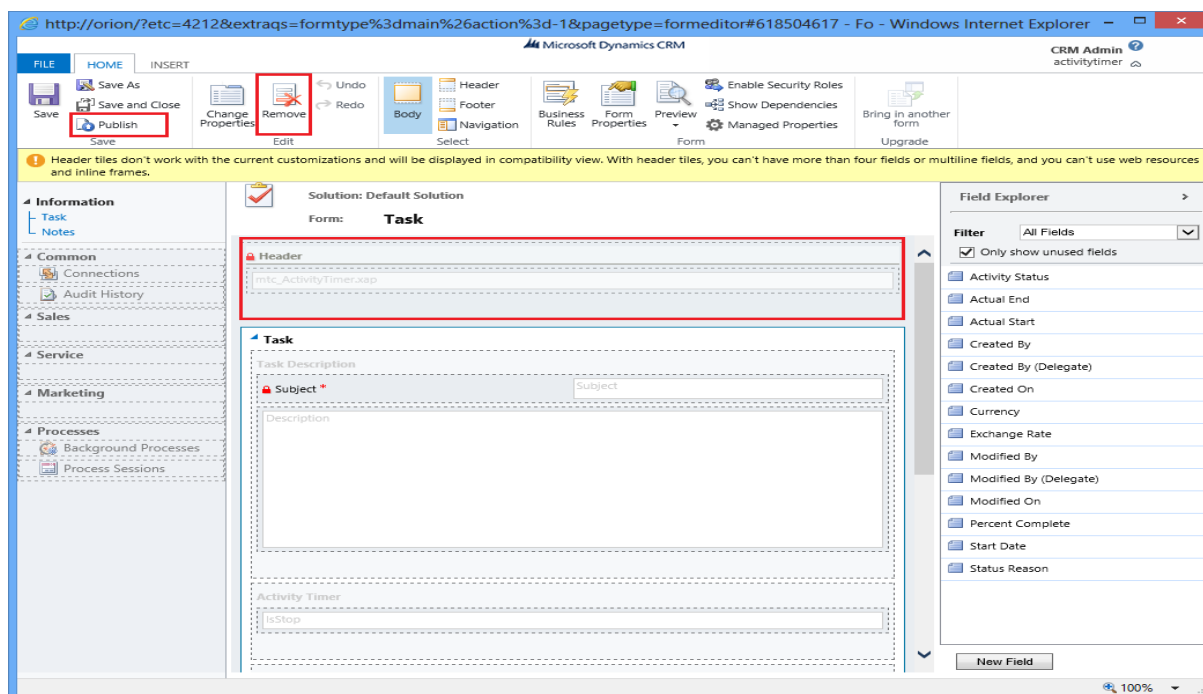




Figure 24: Remove from the Form

Uninstallation Process

To uninstall the Activity Timer from your CRM, open your online CRM go to **Settings → Solutions**.

- ▶ Select the solution Activity Timer by selecting the Check box.
- ▶ To uninstall / Delete / Remove solution , click on Delete button as shown below
- ▶ Uninstall Solution web Dialog pops up – click on Ok
- ▶ The Solution will be removed from the CRM 2013
- ▶ Follow the same process to remove Licensing solution also

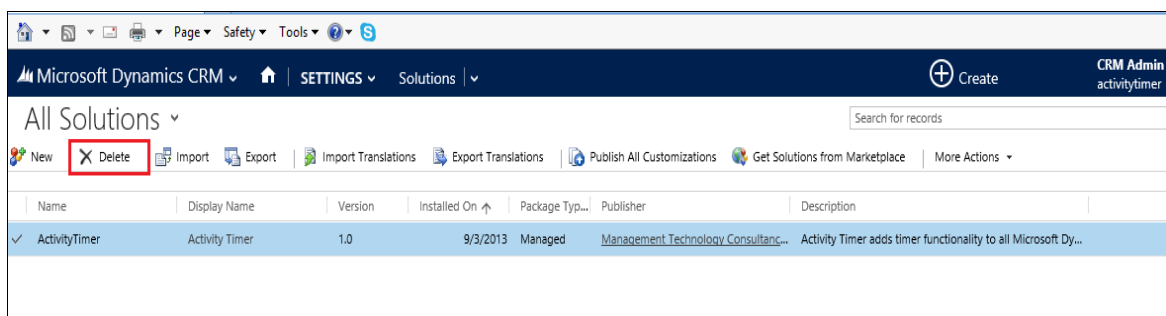
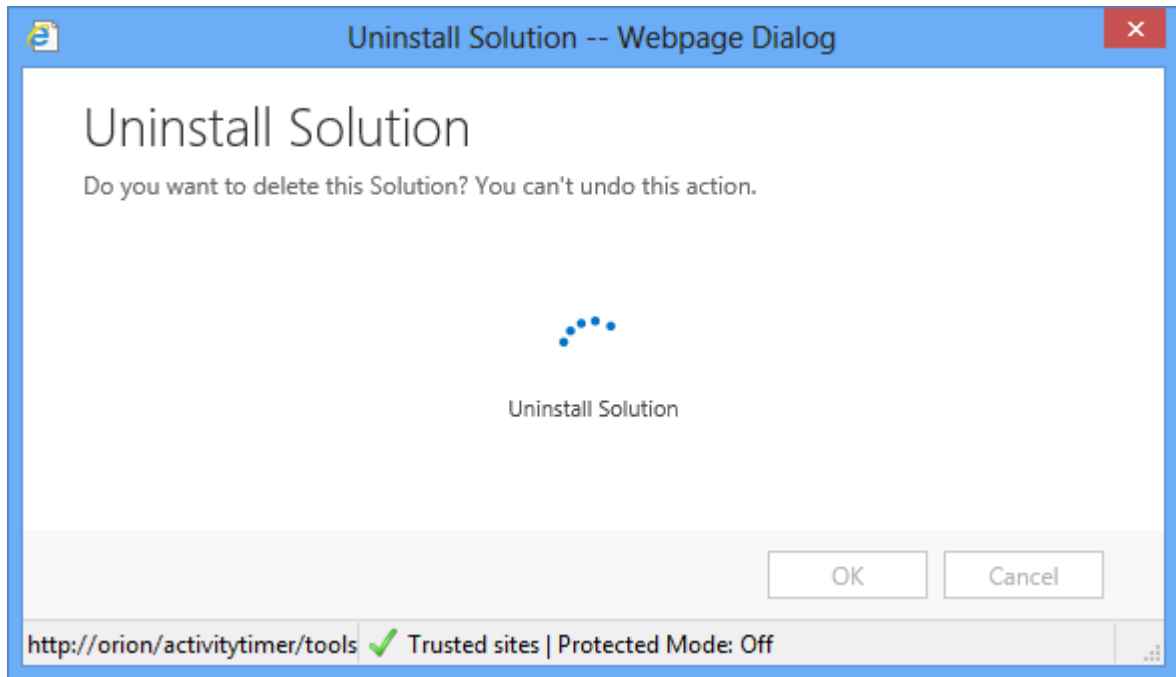


Figure 25: Solution Window





MTC Overview

MTC develops an ever growing and extensive family of add-on products, complete solutions, and core development technologies for the Dynamics 365 / CRM platform. MTC supports a product development effort with a highly efficient global Dynamics 365 / CRM exclusive services business 24/7. MTC's products represent the refinements in functionality, deliverability, and long-term maintainability of unique highly customized Dynamics 365 / CRM platform business solutions suggested as most important in MTC's global volume customization business. MTC runs its internal operations and many of its partners and affiliates with this example



Small and medium sized businesses (SMB) can now affordably build the kind of enterprise automation system that distinguishes the best unique-line-of-business enterprises on earth. MTC uniquely delivers a very-unique service of clear value to businesses globally seeking automation as a business advantage.

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For more information on the dozens of integrated products of the "SMB Custom Enterprise" solution set visit: www.MTCCRM.com MTC's low-cost and fixed-rate professional services current rate schedule: www.MTCCRM.com/MTC_Services.pdf.



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The Global CRM Community DynamicsExchange.com

MTC is the founding and managing partner of the Dynamics 365 / CRM platform Community at www.DynamicsExchange.com. Dynamics Exchange is crowd-source built and dedicated to driving down the costs of implementation and enhancement of the Dynamics 365 / CRM platform with unique and innovative social networking and knowledge resource allocation processes.

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9. End-User agrees that MTC and its affiliates may collect and use technical information End-User provide as a part of support services related to the Product.
10. End-User acknowledges that the Dynamics 365 / CRM Managed Solution "Product" is of U.S. origin and agrees to comply with all applicable international and national laws that apply to the Product, including the U.S. Export Administration Regulations, as well as end-user, end-use and destination restrictions issued by U.S. and other governments.
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12. End-User's sole and exclusive remedy for any damage or loss in any way connected with the Product furnished herein, whether by breach of warranty, negligence, or any breach of any other duty, shall be, at MTC's option, replacement of the Product or return or credit of an appropriate portion of any payment made by End-User with respect to such Product. Under no circumstances shall MTC or its OEM Partner(s) be liable to End-User or any other person for any indirect, special or consequential damages of any kind, including, without limitation, damages for loss of goodwill, work stoppage, computer failure or malfunction or any and all other commercial damages or losses. Additionally, MTC assumes no liability for damages caused by incorrect parts usage and has no responsibility to verify that the parts are correct for a customer's vehicle in accordance with the manufacturers' specifications.
13. MTC may cancel this license at any time if End-User fails to comply with the terms and conditions of this Agreement; and MTC may obtain injunctive relief and may enforce any other rights and remedies to which it may be entitled in order to protect and preserve its proprietary rights.
14. This Agreement is the complete and exclusive statement of the understanding between the parties, with respect to the subject matter, superseding all prior agreements, representations, statements and proposals, oral or written.
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F. Customer Care details

MTC is always open to global community of Dynamics 365 / CRM platform Software Users



Availability and hours of operation: Monday to Friday
USA PST 323-851-5008 - 8:00 AM to 6:00 PM
India IST 323-863-0077 - 8:30 PM to 8:30 AM in PST

USA Headquarters:
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7738 Sky hill Drive, Los Angeles, CA 90068



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