

# User Guide



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*Solution Version: 365\_082017\_3\_3*

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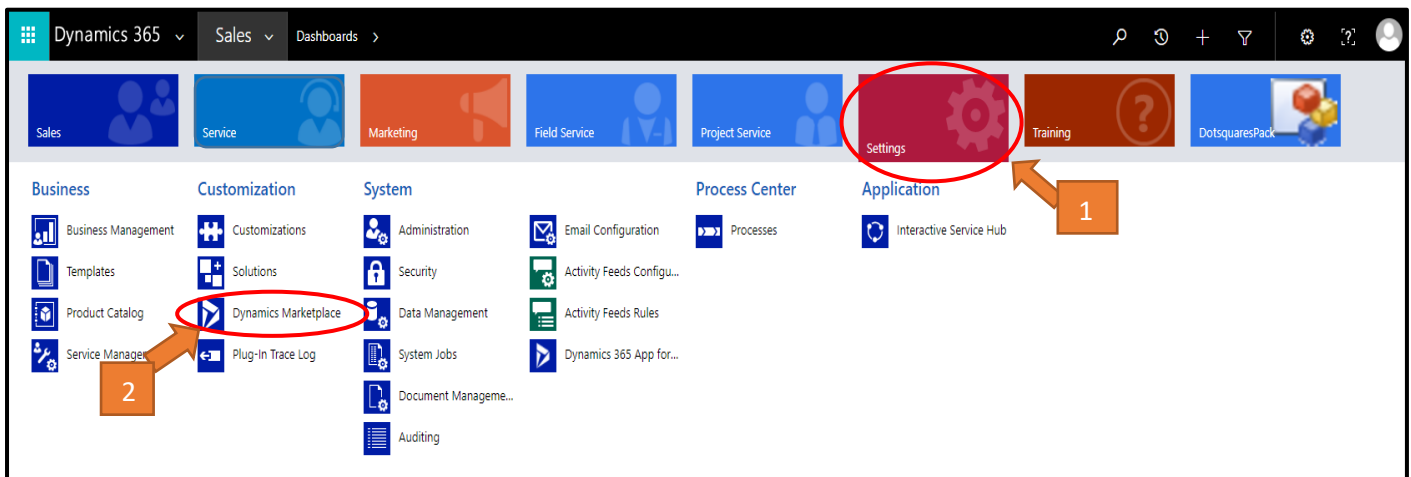
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## How to Install Activity Timer in your Dynamics 365?

- To **install** MTC's Activity Timer solution in your Dynamics 365, please follow the below instructions.

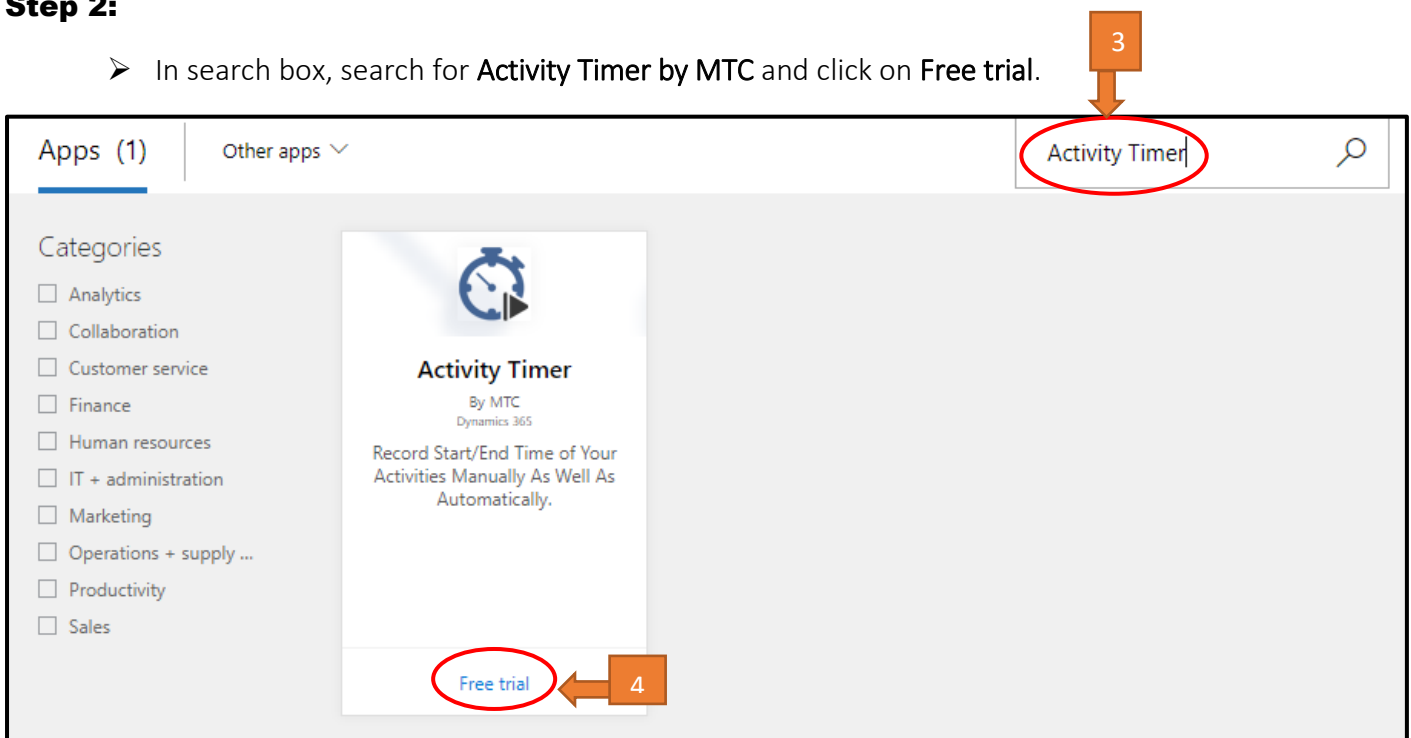
### Step 1:

- Navigate to **Dynamics 365**→**Settings**→**Dynamics Marketplace**.



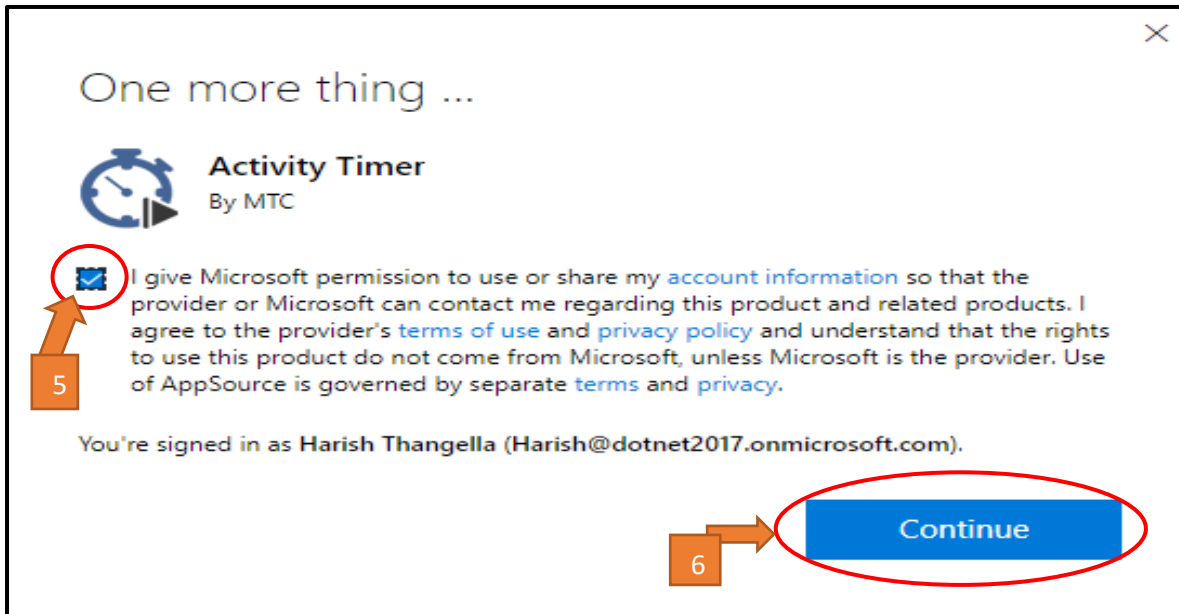
### Step 2:

- In search box, search for **Activity Timer** by MTC and click on **Free trial**.



### Step 3:

- Tick the **Check Box** to give permissions and click on **Continue**.



### Step 4:

- Tick the two check boxes to agree **Microsoft Legal Terms and conditions** and agree to **Privacy Statement and Legal Terms** and click on **Agree** for importing the solution.

**Add the application to Dynamics 365**

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365

Organization to add the application to: MTC (orge03d5402) ▼

☒ Agree to Microsoft's [Legal Terms](#) and [Privacy Statement](#)

☒ Agree to [Privacy Statement](#) and [Legal Terms](#) for importing solutions into Dynamics 365

7

8

**Agree** **Cancel**

### Step 5:

- After clicking on agree the **Installation Process Begins**.

Select a preferred solution to manage on selected instance: MTC

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Activity Timer	365.52017.3.1	1/1/2050	Installation pending
Company News Timeline	1.0.1.0	12/31/2050	Not installed
Dotsquares Auto Number ...	1.0	1/23/2021	Installed
Dynamics 365 Customer S...	1.0.0.1	1/1/2050	Installed

### Step 6:

- After completing the installation, go to **Dynamic 365** → **Settings** → **Solutions**. You will find that licensing and solutions being installed, and Click on **Licensing**.

ActivityTimer	9	Activity Timer	365.052017....	8/17/2017	Managed	Management Technology Consultanc...
Licensing		Licensing	1.0.5.5	8/17/2017	Managed	Management Technology Consultanc...
dsautonumber		Dotsquares Auto Number ...	1.0	8/9/2017	Managed	Dotsquares Ltd.
MTC_AutoNumber		MTC AutoNumber	365.062017....	8/9/2017	Managed	Management Technology Consulting
MTC_MultipleFileAttachme...		MTC_MultipleFileAttachme...	1.0.0.0	8/8/2017	Managed	Management Technology Consultanc...

### Step 7:

- Please fill up the **Account Information** and click on **submit**. "This will be a onetime activity."

### ACCOUNT INFORMATION

First Name\*

Last Name\*

Phone\*

Company\*

Website\*

Email\*

City\*

State/Province\*

Country\*

Zip/Postal Code\*

Submit

### Step 8:

- After submitting the registered form, the account registration window refreshes automatically and loads up all MTC products just below and you can find Auto Number as **Installed**.

Products	Expiry Date	No of Users				
Report To PDF			<a href="#">Get it Now</a>			
Auto Number	8/24/2017	0	Installed	<a href="#">Purchase License</a>	<a href="#">Update License</a>	
Note Pro			<a href="#">Get it Now</a>			
<b>ActivityToDoBundle</b>				<a href="#">Purchase As Bundle</a>	<a href="#">Update License</a>	
Activity Calendar			<a href="#">Get it Now</a>			
Activity Timer			Installed	<a href="#">Purchase License</a>	<a href="#">Update License</a>	
Alerts			Installed	<a href="#">Purchase License</a>	<a href="#">Update License</a>	
My Calendar			<a href="#">Get it Now</a>			

**Note: Your free trial license key will be generated and applied automatically from the first use of the product.**

## Activity Timer Configuration

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

- E mail
- Task
- Campaign response
- Fax
- Approval
- Letter
- Appointment
- Booking Alerts
- Phone Call

### Step 1:


- Navigate to **Dynamic 365 -> Settings -> Solutions**. . Click on **Activity Timer** solution.

ActivityTimer		Activity Timer	365.052017....	8/17/2017	Managed	Management Technology Consultanc...
✓ Licensing	Licensing	Licensing	1.0.5.5	8/17/2017	Managed	Management Technology Consultanc...
dsautonumber	Dotsquares Auto Number ...	1.0	8/9/2017	Managed	Dotsquares Ltd.	
MTC_AutoNumber	MTC AutoNumber	365.062017....	8/9/2017	Managed	Management Technology Consulting	
MTC_MultipleFileAttachme...	MTC_MultipleFileAttachme...	1.0.0.0	8/8/2017	Managed	Management Technology Consultanc...	

### Step 2:

- Click on **Activity Timer Settings**.

Activity Timer Configuration



**Activity Timer Settings** ← 2

This menu editor function allows you to change the settings of Activity Timer.

### Step 3:

- A window appears where you can configure the settings of the timer.

Activity Timer Settings

Activity Type	Auto Timer	Notes	Fixed Time	Display Timer	Cost per Hour
Email	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>	50
Campaign Response	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Fax	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Approval	<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"/>	
Booking Alert	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Phone Call	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	

3 → Save

- 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.

#### Cost per hour:

- You can mention the cost as per time the CRM user works for the same activity.

#### Step4:

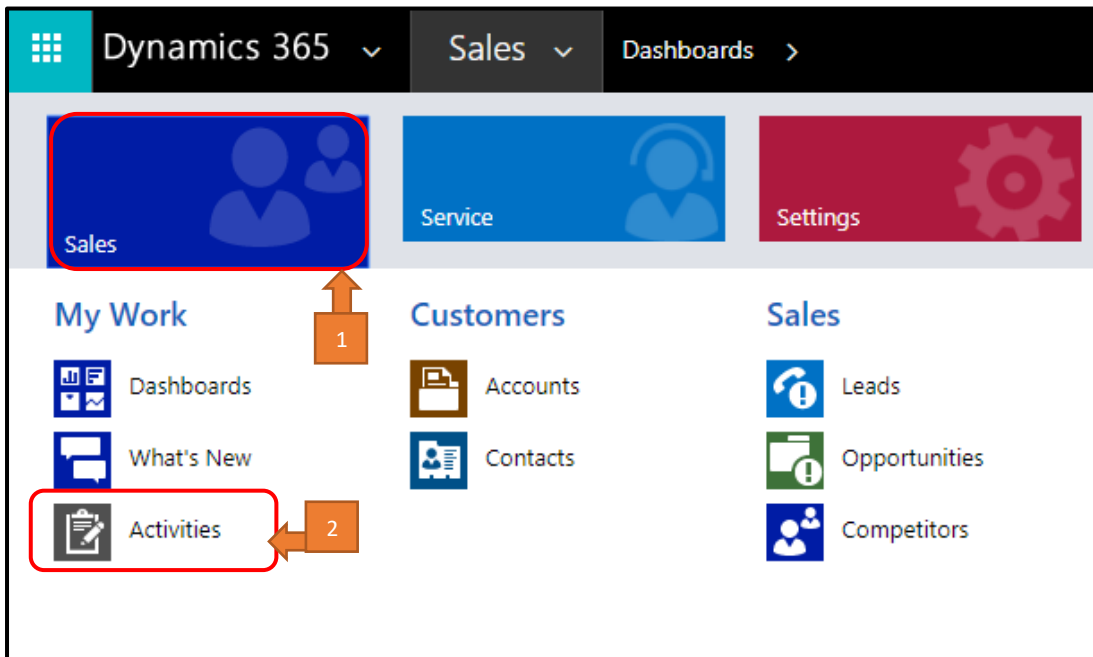
- You will get a **Setting saved successfully** pop-up message. Click on **OK**.



## Activity Timer Functionality

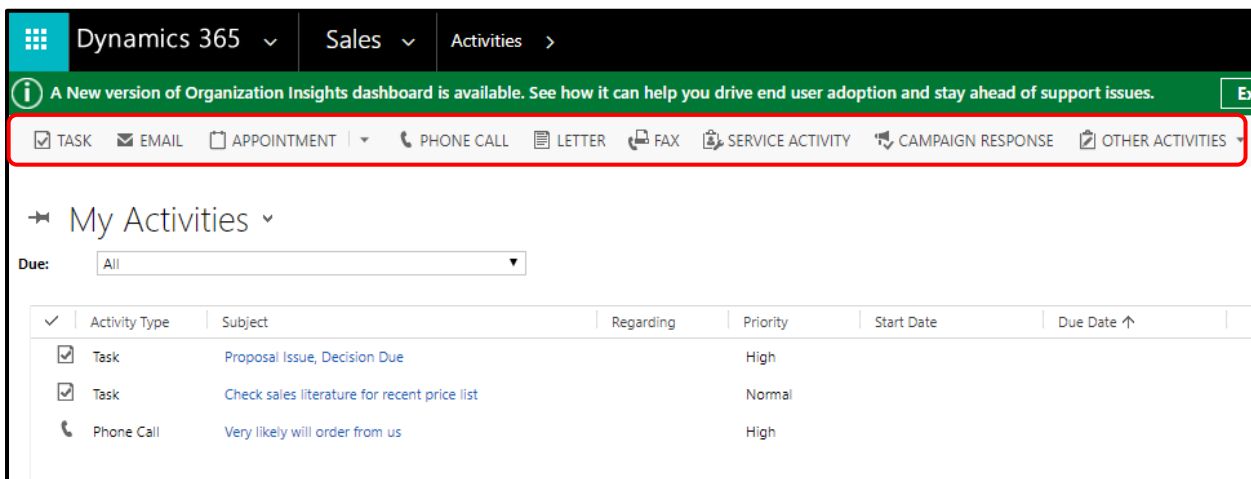
### Step 1:

- Navigate to Dynamics365→Sales→Activities.



### Step2:

- You can find all the **Activities** below in the image.



## 1. Auto Timer:

- For example select 'Task' as an Activity Type and check the 'Auto Timer'. If you have selected the 'Auto Timer' the clock starts running automatically as soon as you open the form.
- If you haven't tick the check boxes of Auto Timer, then click on **Start** to start the timer.
- You can see the duration in the "Duration Field" as shown in the above image.

The screenshot shows the 'New Task' form in Microsoft Dynamics CRM. The 'TASK: INFORMATION' tab is selected. The 'Auto Timer' checkbox is checked, and the timer is running, showing a duration of 00:00:10:04. The 'Duration' field is highlighted with a red box, showing '10 minutes'. Other fields include 'Subject', 'Regarding', 'Exchange Rate', 'Owner' (Mohit Marothia), 'Due', 'Category', 'Actual Start', 'Activity Status' (Open), 'Percent Complete', 'Priority' (Normal), 'Sub-Category', 'Actual End', and 'Status Reason' (In Progress).

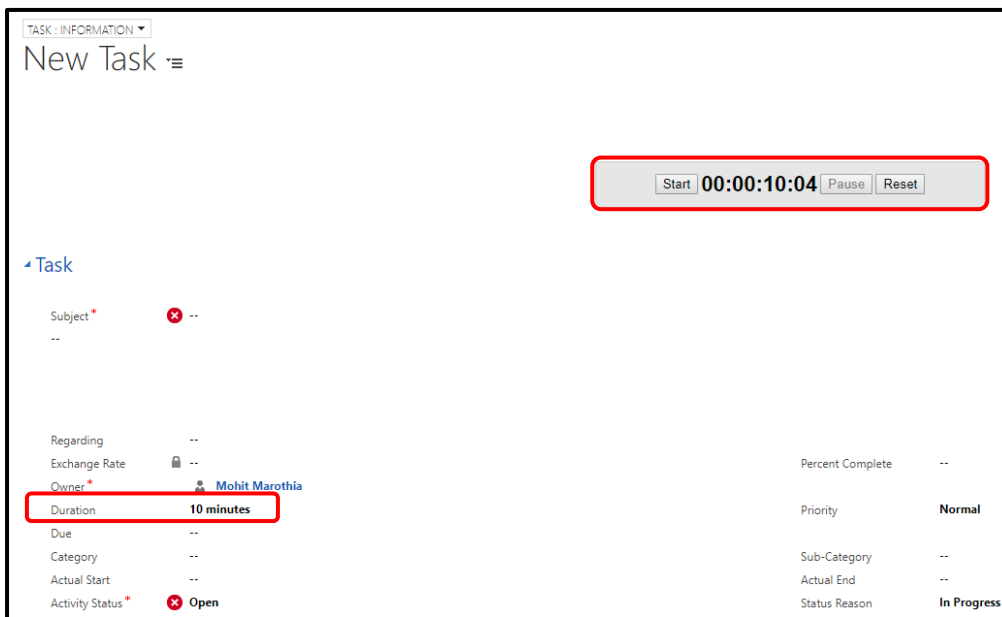
## 2. Notes:

- If you have selected 'Notes', a Notes pop-up message will appear only for the saved records. You can enter the text of your requirement and click on **Ok**.

The screenshot shows a 'Notes' pop-up message. The message says 'pass987.crm8.dynamics.com says: Enter Your Notes Here'. There is a text input field and 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red box. An orange box with the number '3' and an arrow points to the 'OK' button.

### 3. Fixed timer:

- Select the 'Task' from the Activity Type as 'Fixed Time'. Enter the details in the text box as per your need (for example here the value entered is 10). If you have selected the 'Fixed Time,' the timer on the activity windows starts in the descending order until the timer reads 00:00 hrs.



Task: INFORMATION

New Task

Start 00:00:10:04 Pause Reset

Task

Subject

Regarding

Exchange Rate

Owner Mohit Marothia

Duration 10 minutes

Due

Category

Actual Start

Activity Status Open

Percent Complete

Priority Normal

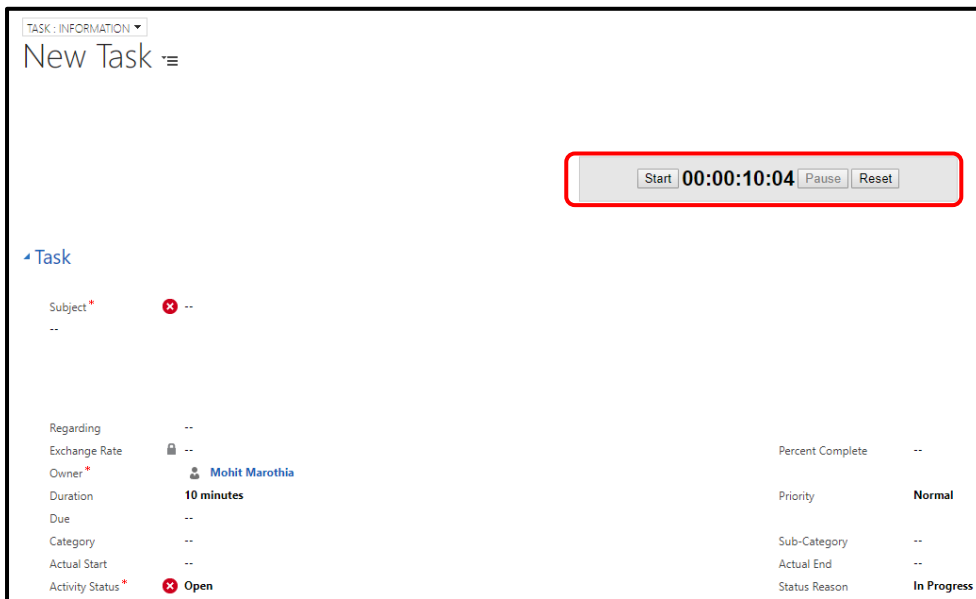
Sub-Category

Actual End

Status Reason In Progress

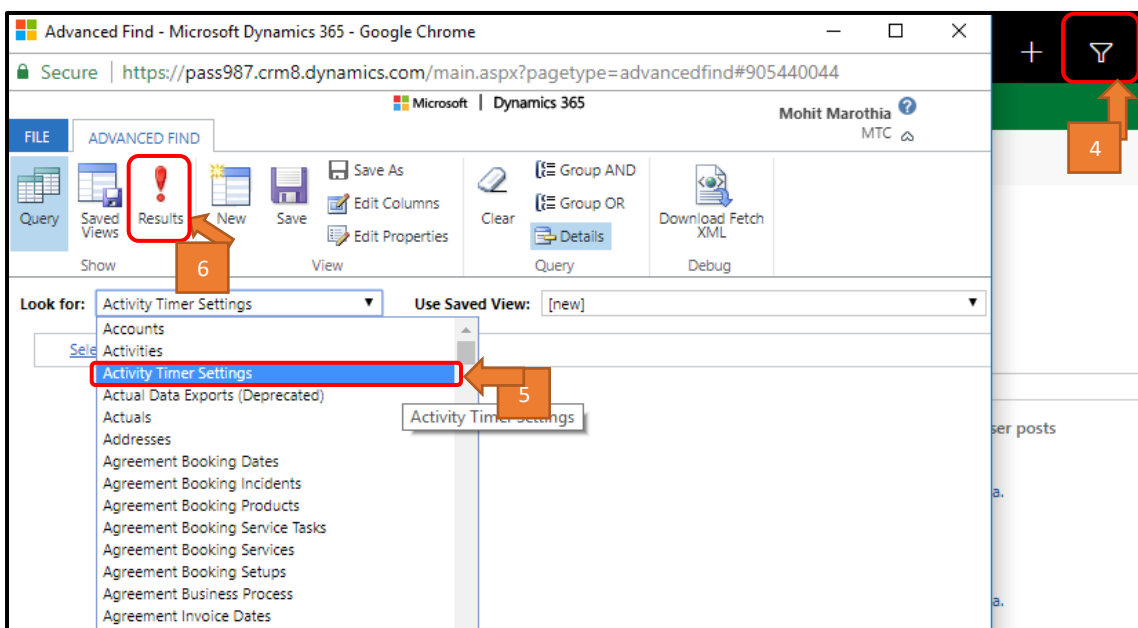
### 4. Display Timer:

- Tick the check boxes of 'Display timer' to get the timer displayed on the header of the New Tasks window.

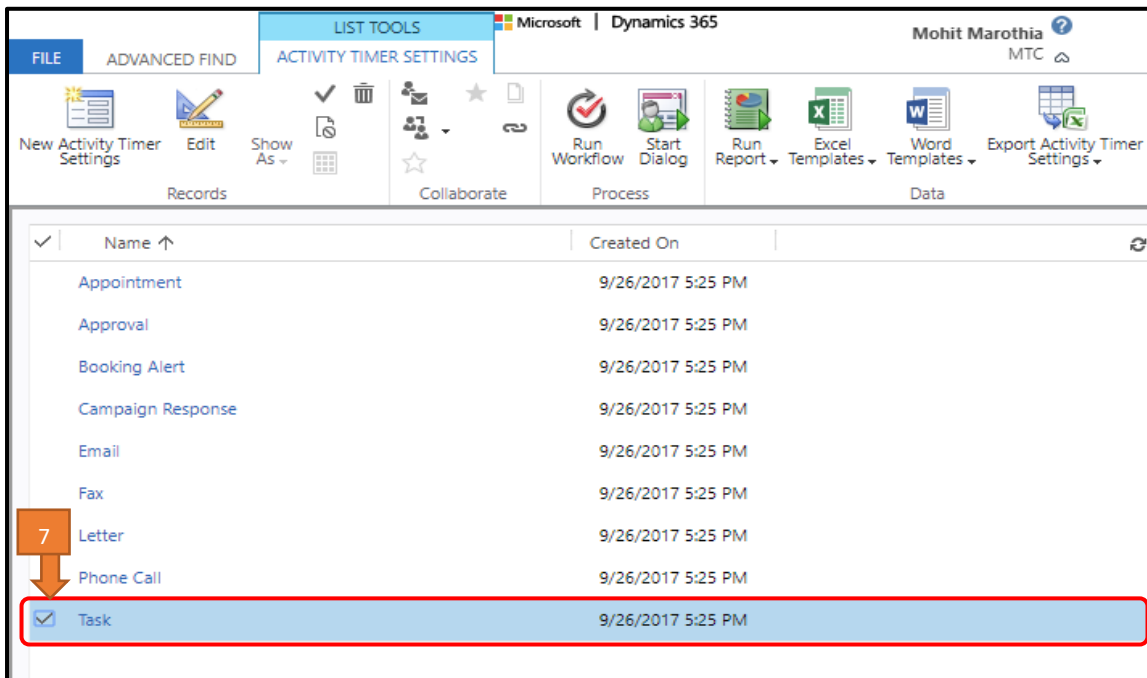


## 5. Cost per Hours:

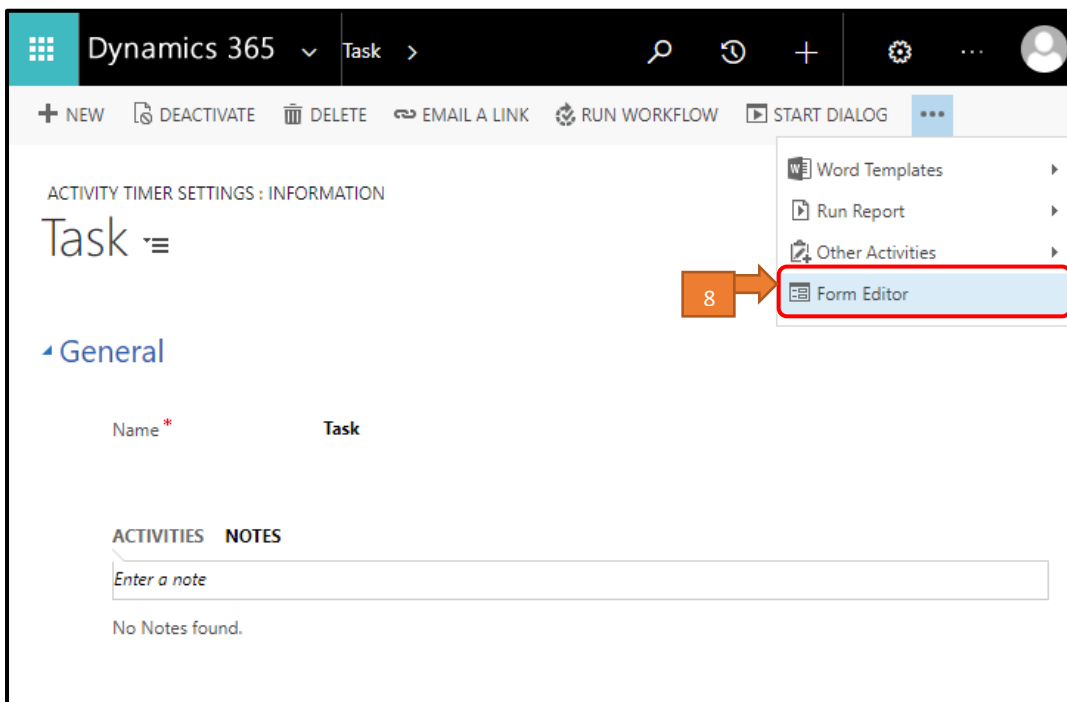
- Navigate to Dynamics365 → Advance Find. From Look for Scroll down option, select **Activity Timer Setting**.
- Click on **Results**.



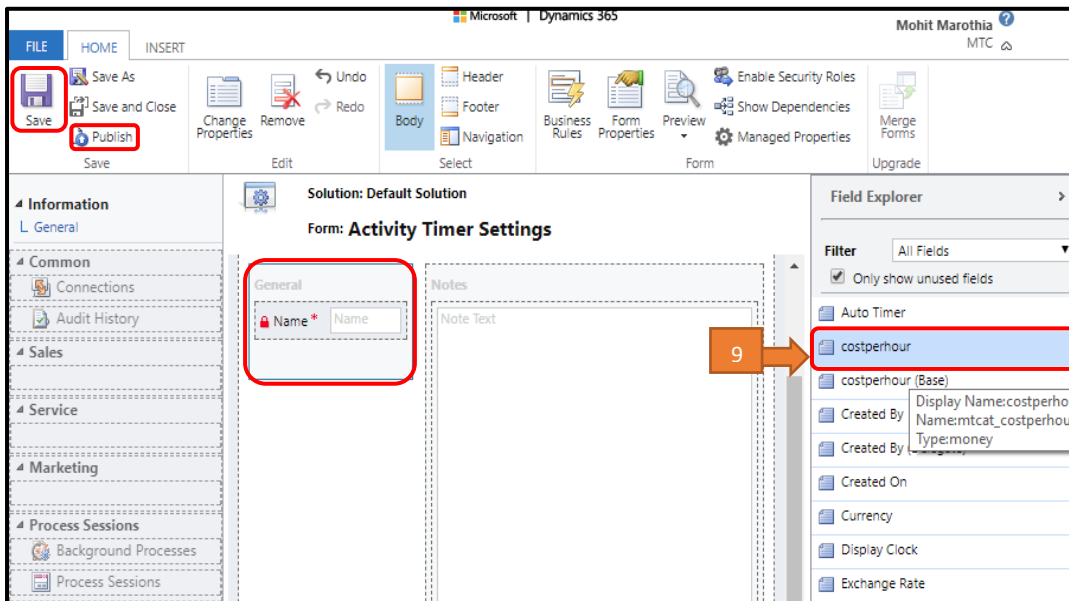
- A new window appears with all the **Activity forms**.
- For example as we have configured Tasks in the Activity Timer Setting, Select **Task** as activity.



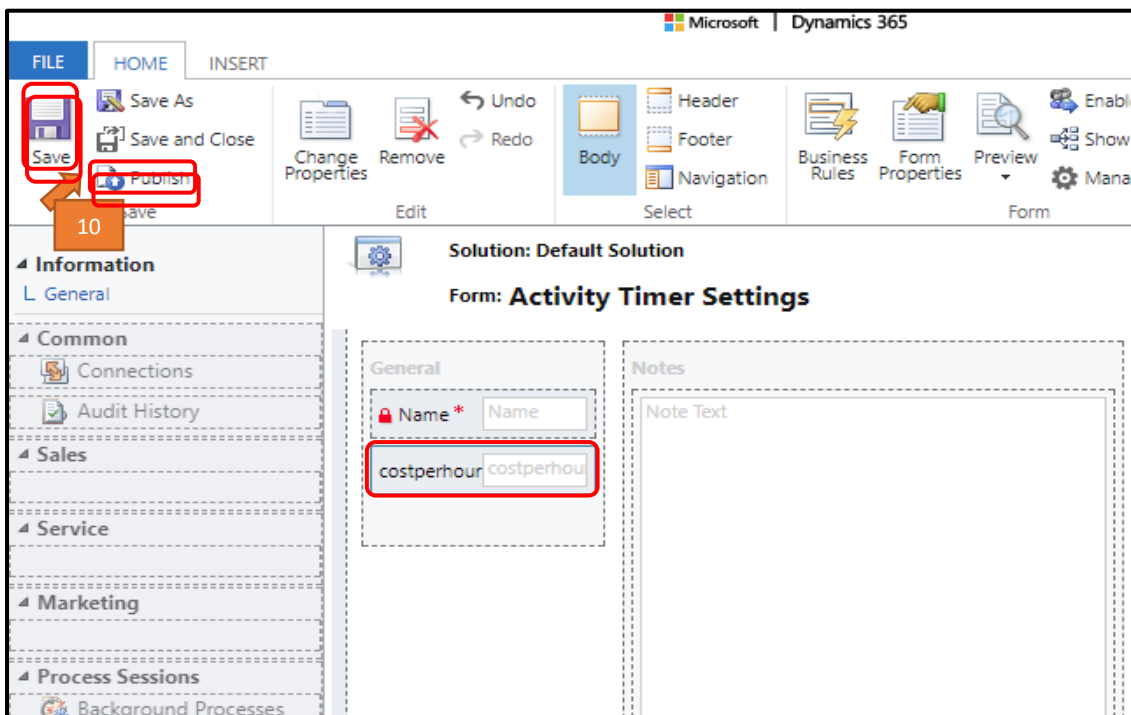
- From the Ribbon Buttons as show below, click on **More Option** and select **Form Editor**.



- For suppose you need to add **Costperhour** in **general tab**.
- Click on **General tab** and double click on **costperhour** Field type or we also have an option of **drag-en-drop** facility.



➤ After adding costperhour to the general tab. Click on **Save and Publish**.



➤ You can find the **costperhour** as field name in the general tab.

Dynamics 365

Task

+

NEW

DEACTIVATE

DELETE

EMAIL A LINK

RUN WORKFLOW

START DIALOG

ACTIVITY TIMER SETTINGS : INFORMATION

Task

General

Name *	Task
costperhour	₹50.00

ACTIVITIESNOTES

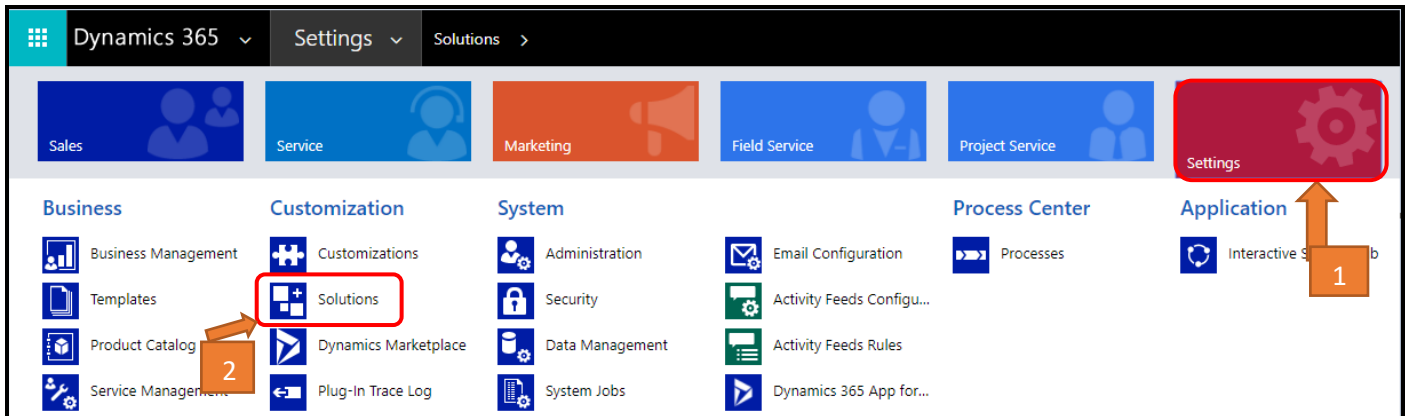
Enter a note

No Notes found.

## How to Uninstall Activity Timer in your Dynamics 365?

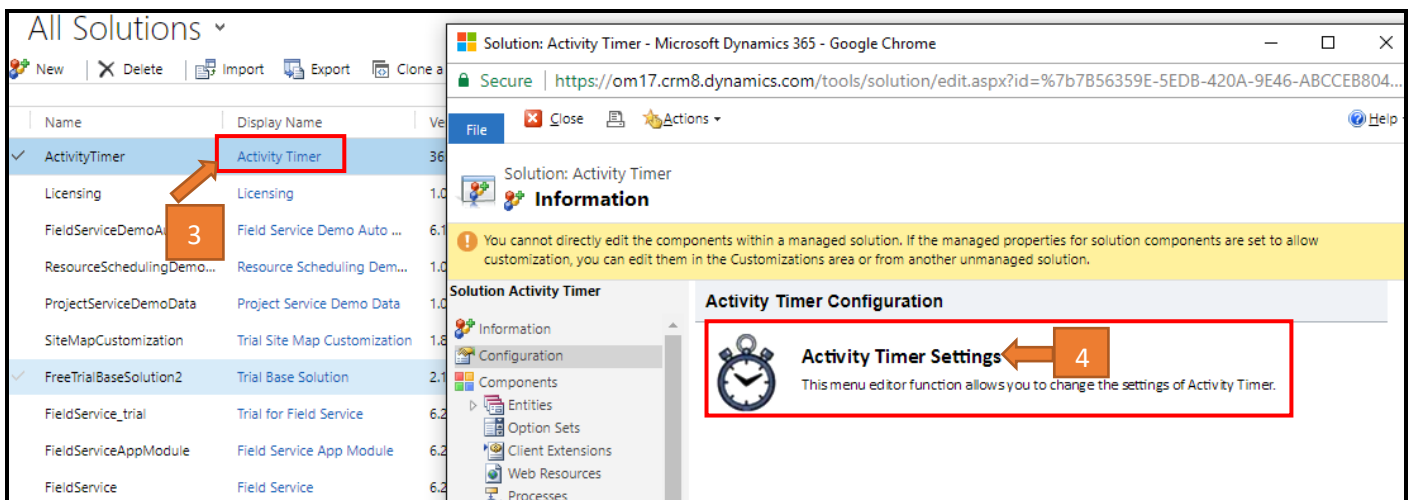
### Step1:

- Navigate to **Dynamics365→Settings→Solutions**.



### Step2:

- Click on **Activity Timer** and select **Activity Timer Settings**.



### Step3:

- You can find the selected activities for which you have configured.

Activity Timer Settings

Activity Type	Auto Timer	Notes	Fixed Time	Display Timer	Cost per Hour
Email	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>	50
Campaign Response	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Fax	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Approval	<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"/>	
Booking Alert	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Phone Call	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	

Save

- Uncheck all the check boxes and click on **save**.

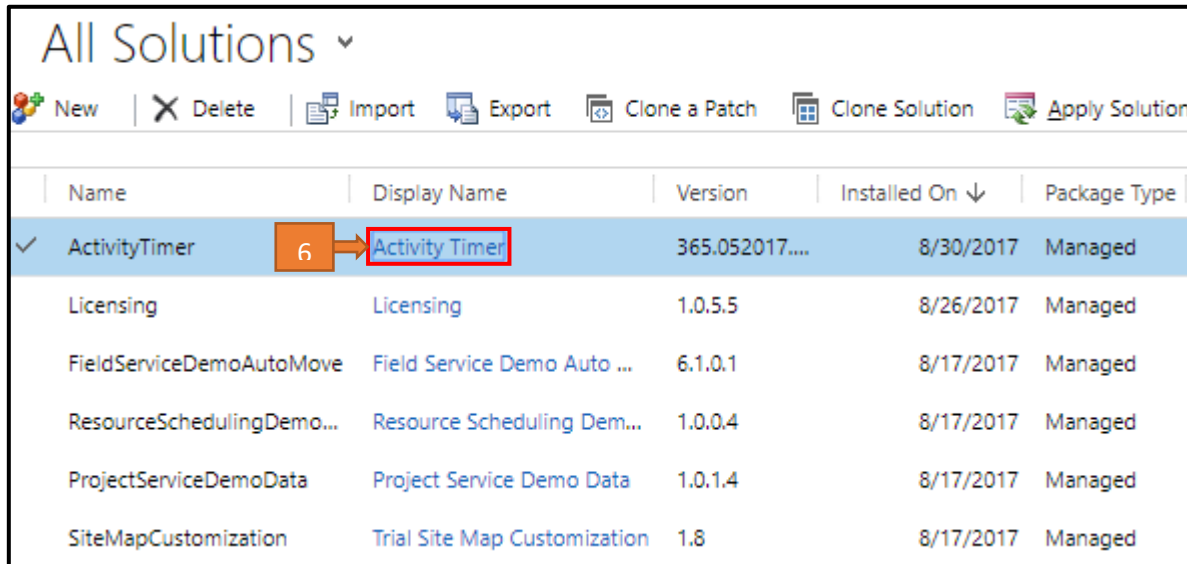
Activity Timer Settings

Activity Type	Auto Timer	Notes	Fixed Time	Display Timer	Cost per Hour
Email	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Task	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Campaign Response	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Fax	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Approval	<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"/>	
Booking Alert	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Phone Call	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	

5 → Save

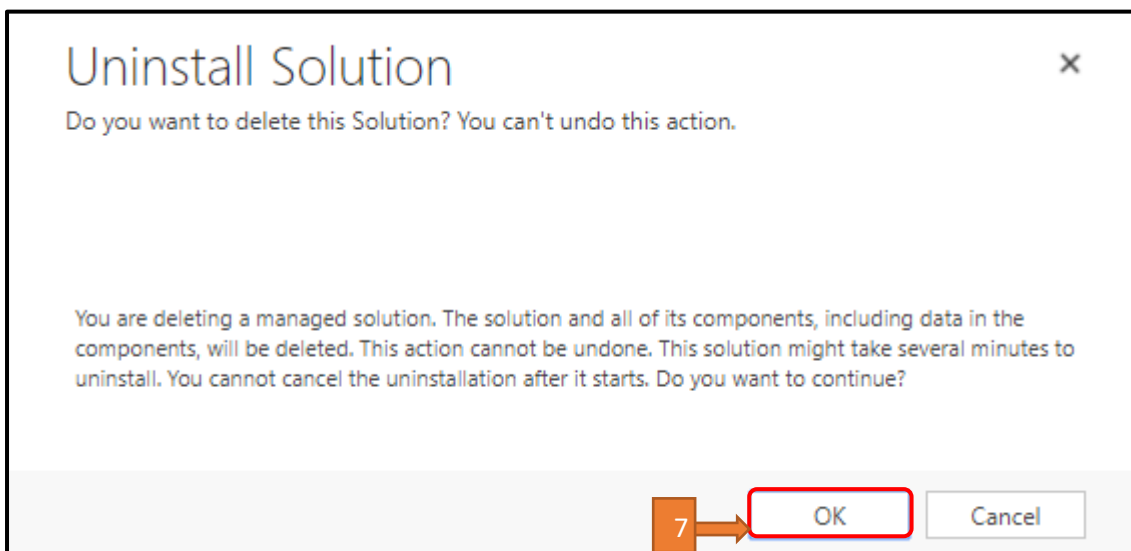
### Step5:

- Select **Activity Timer** and click on **delete** to uninstall the **Activity Timer** solution.



### Step6:

- Click on **ok** to uninstall Activity Timer solution.



## Step7:

- Navigate to **licensing** to check whether the solutions has been uninstalled or not.

ActivityTimer	Activity Timer	365.082017....	9/26/2017	Managed	Management Technology Consultanc...
✓ Licensing	<a href="#">Licensing</a>	1.0.5.5	9/21/2017	Managed	<a href="#">Management Technology Consultanc...</a>
FieldServiceDemoAutoMove	Field Service Demo Auto ...	6.1.0.1	9/1/2017	Managed	Dynamics 365
ResourceSchedulingDemo...	Resource Scheduling Dem...	1.0.0.4	9/1/2017	Managed	Dynamics 365
ProjectServiceDemoData	Project Service Demo Data	1.0.1.4	9/1/2017	Managed	Dynamics 365
SiteMapCustomization	Trial Site Map Customization	1.8	9/1/2017	Managed	Microsoft Dynamics 365
FreeTrialBaseSolution2	Trial Base Solution	2.1.0.0	9/1/2017	Managed	Microsoft Dynamics

## Step8:

- Click on **licensing**. You can see that **Activity Timer solutions** has been changed to **Get It Now** from **Installed**. But the expiry date will be as usual.

ActivityToDoBundle				<a href="#">Purchase As Bundle</a>	<a href="#">Update License</a>
Activity Calendar			<a href="#">Get it Now</a>		
My Calendar			<a href="#">Get it Now</a>		
Alerts			Installed	<a href="#">Purchase License</a>	<a href="#">Update License</a>
Activity Timer	10/11/2017	0	<a href="#">Get it Now</a>		