Activity Timeline for Microsoft Dynamics® CRM

Version 2.0

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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

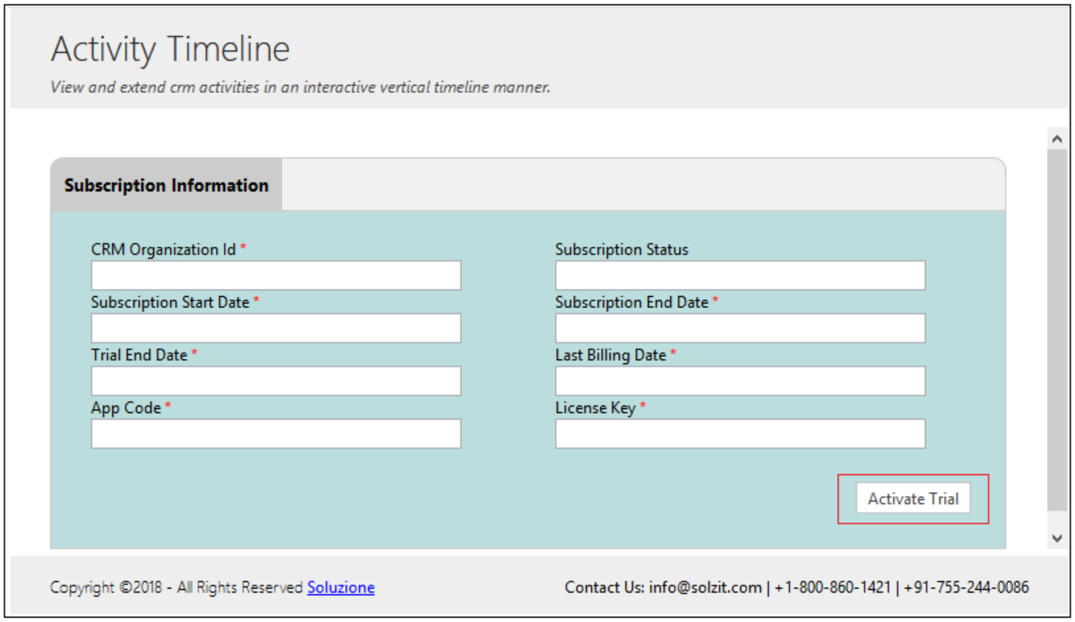
The activity timeline solution trial can be obtained from Microsoft AppSource or you can contact us for the same at info@solzit.com. The solution can only be installed by Microsoft Dynamics CRM administrators or by users with administrative privileges for Microsoft Dynamics CRM.

How to Activate the Trial?

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

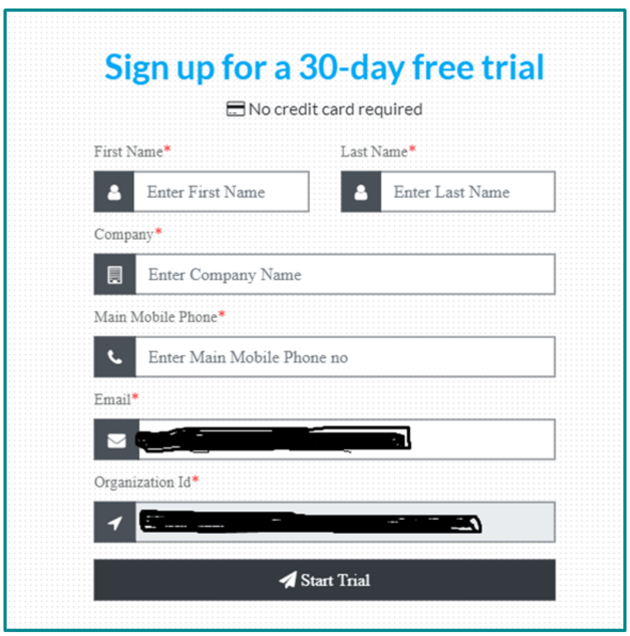
Step 1:

- 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.

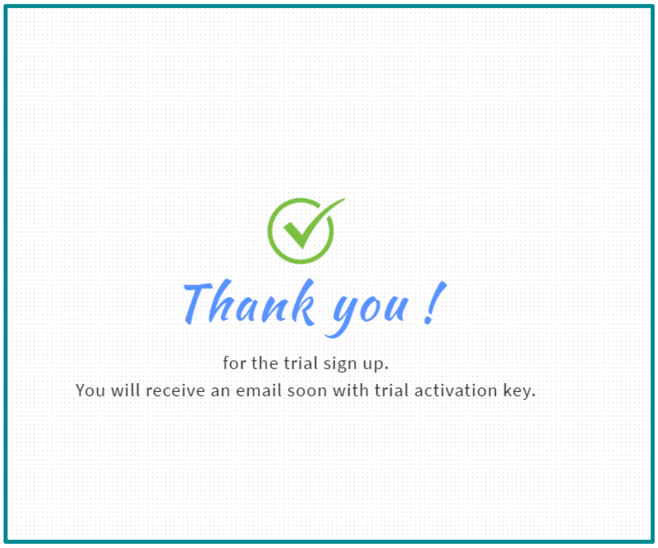


Step 2:

- 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.



- Some of the details will be pre-filled such as Organization Id and email. Fill in other details and click on Start Trial. Your trial subscription request will be processed, and you will be redirected to thank you page.

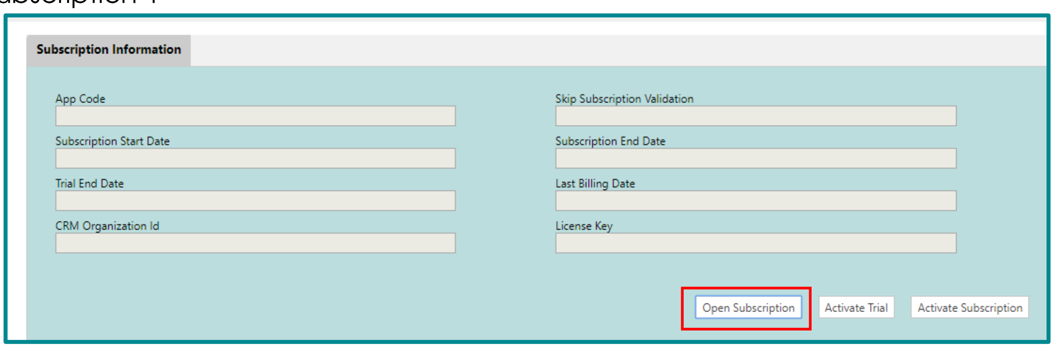


Step 3:

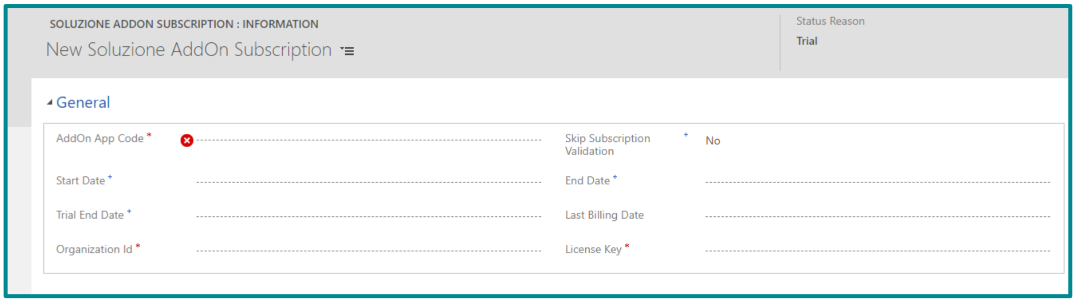
- Once your trial is activated, you will receive an email on your registered email Id with the following details:
    - AddOn App Code
    - Organization Id
    - Trial End Date
    - License Key

Step 4:

- Go to the configuration page of your solution again and click on the button "Open Subscription".



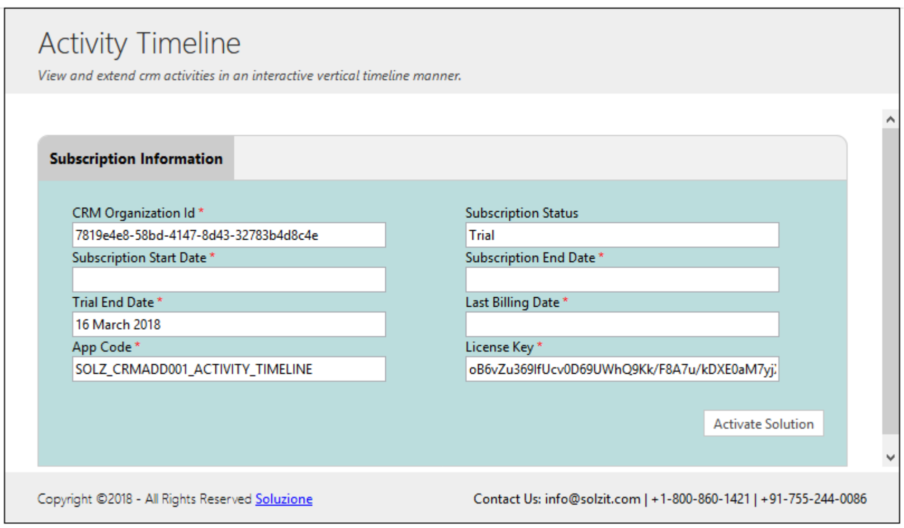
- This will open a new Add-On Subscription CRM Form. Fill in all the details as shared in email. Ensure that you copy and paste details properly without spaces in the form. Dates in the email follow dd-MM-yyyy. You would need to set it accordingly in the CRM form.



- Save and close the form. This action will activate your free trial for the CRM Add-On

Step 5:

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

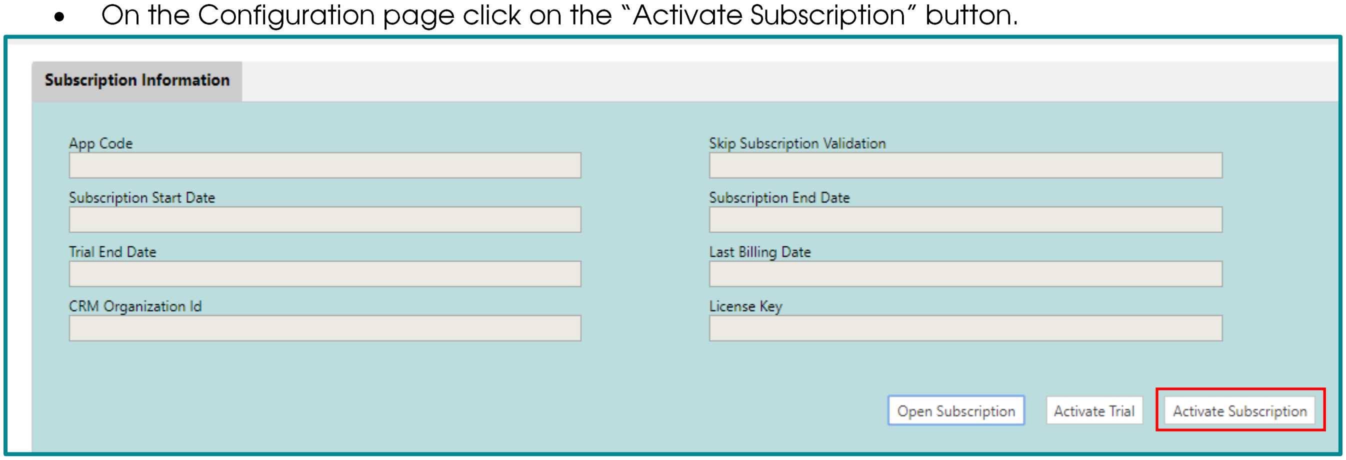


How to Activate Paid Subscription?

You can activate your subscription to paid subscription anytime during or after the trial period. This can be accomplished with the following steps:

Step 1:

- On the Configuration page click on the "Activate Subscription" button.



Step 2:

- When you click the button, Activate Subscription button a web form will open which will require your credit card and address details.

Figure: Activate solution page

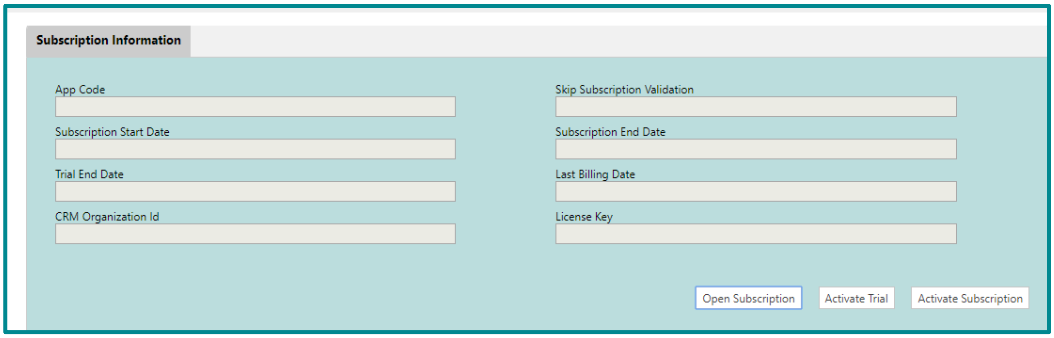
- Some of the details will be pre-filled such as Organization Id, email and active users. Fill in other details and click on Register. Your paid subscription request will be processed, and you will be redirected to thank you page.

Step 3:

- Once your paid subscription is activated, you will receive an email on your registered email Id with the following details:
  - AddOn App Code
  - Organization Id
  - Start Date
  - End Date
  - License Key

Step 4:

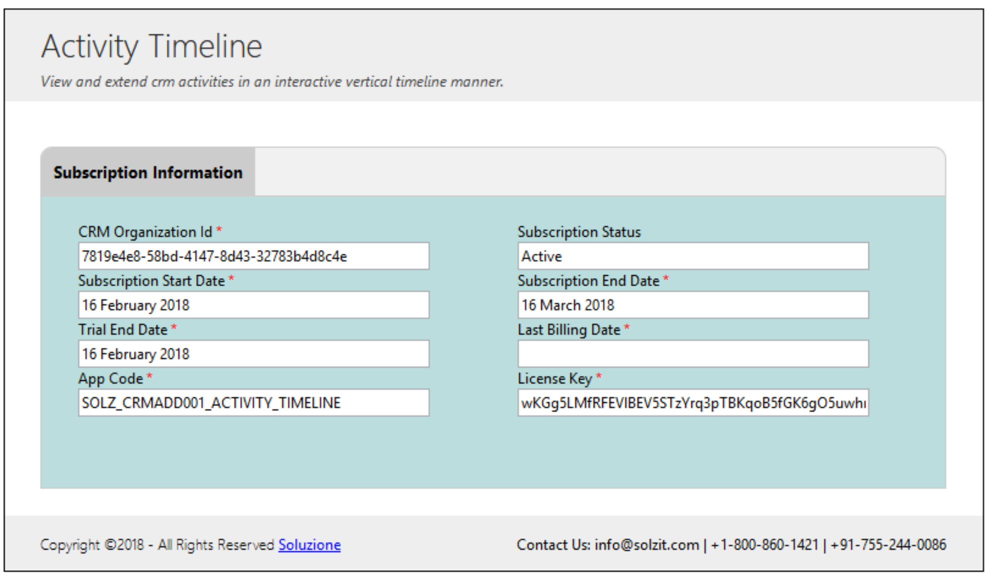
- Go to the configuration page of your solution again and click on the button "Open Subscription".



- This will open a new (or existing trial) Add-On Subscription CRM record. Fill in all the details as shared in email and save the form. Ensure that you copy and paste details properly without spaces in the form. Dates in the email follow dd-MM-yyyy. You would need to set it accordingly in the CRM form.

Step 5:

- To verify upgrade to the paid subscription, refresh the "Configuration Page". It should now have details like subscription start and end date, trial end date, license key etc.



How to Configure the Activity Timeline?

Configuring activity timeline is extremely simple and straight forward.

- **Step 1:** Go to the form where you want to place the activity timeline.
- **Step 2:** Open the form editor and insert the web-resource. Select the web resource "solz_activitytimeline.html".

- **Step 3:** Uncheck the Display label on the form.
- **Step 4:** Go to Formatting section and ensure that you give it around 20 rows of space and remove the border.
- **Step 5:** Save and publish the form. Remember you might need system customizer privileges to do the same.

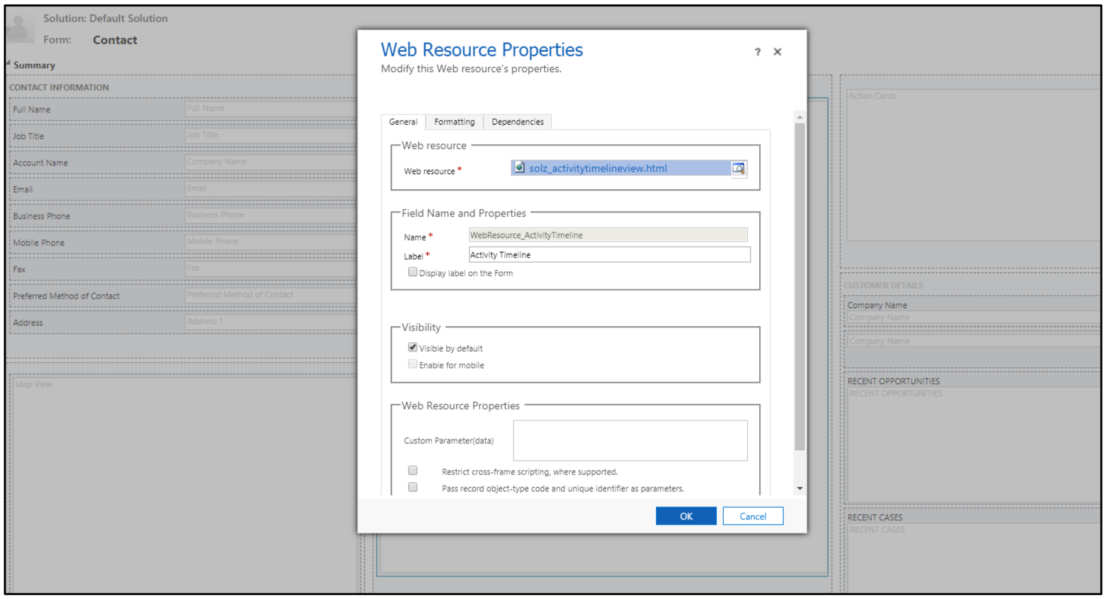


Figure: Insert Web Resource

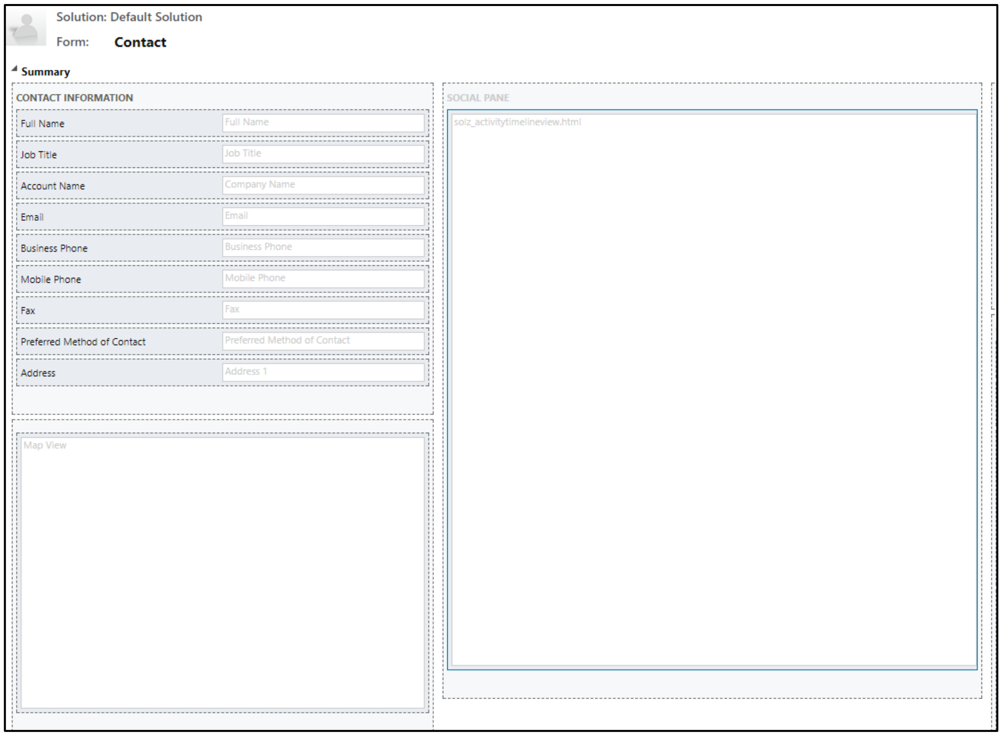


Figure: Activity Timeline web resource inserted in form editor.

Configure Security Roles

Two security roles are created when you install the Activity Timeline solution.

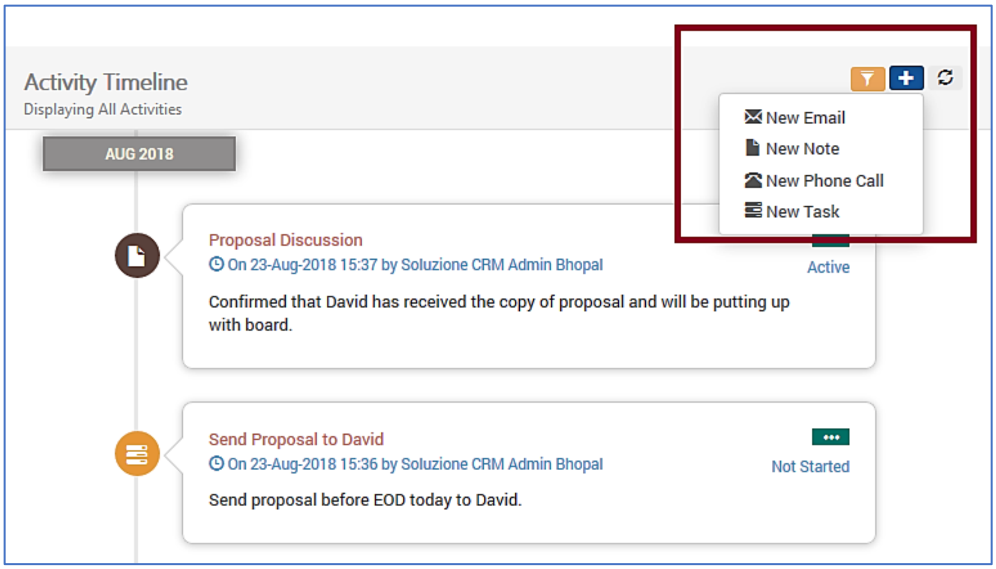
Activity Timeline Admin	Activity Timeline Admin	Security Role
Activity Timeline Users	Activity Timeline Users	Security Role

- **Activity Timeline Users:** Users belonging to this role will be normal users who use Activity Timeline CRM Addon.
- **Activity Timeline Admin:** In addition to Users role the admin role can manage the add-on subscription record.

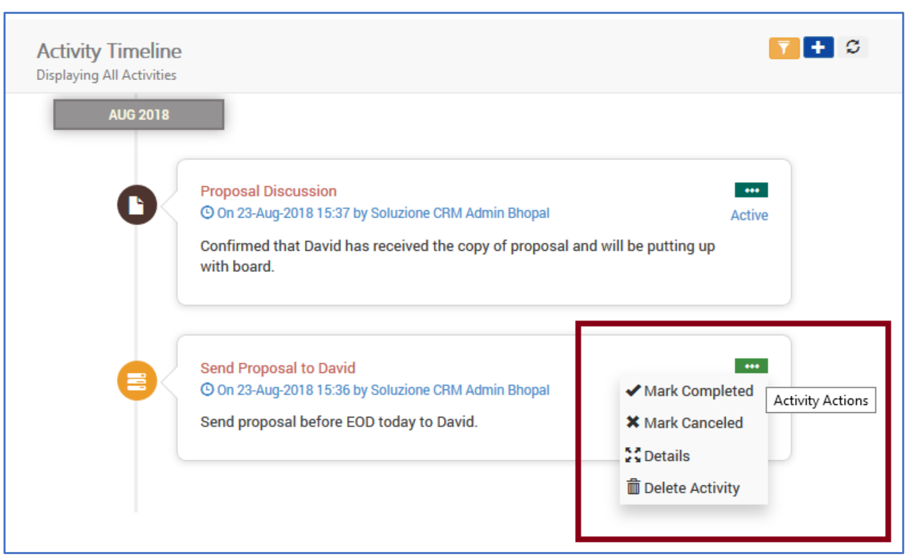
As an admin you need to assign required users to the security roles.

How does Activity Timeline work?

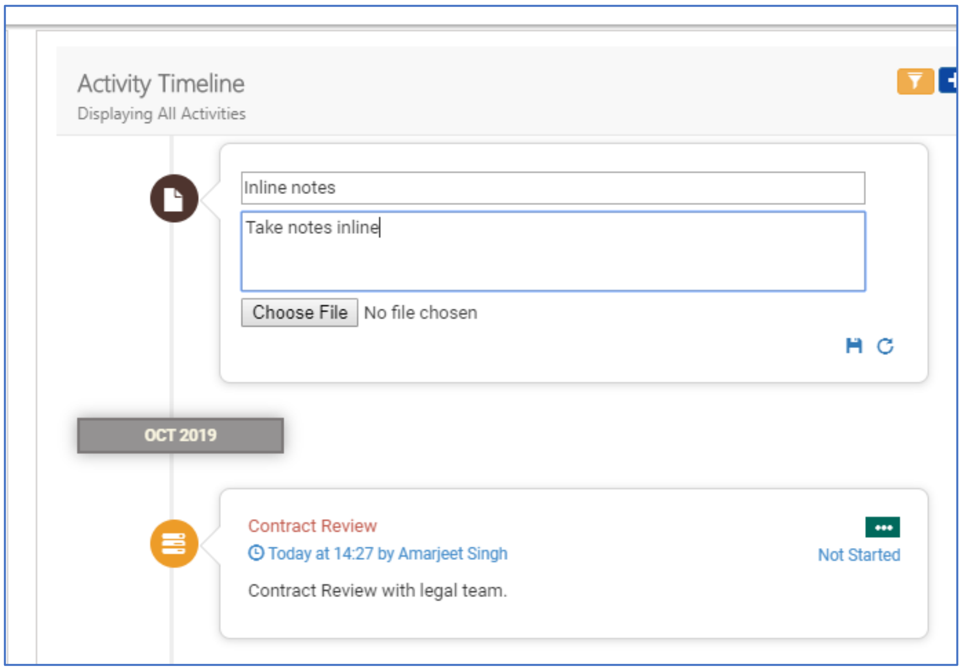
- Assuming the solution is installed, configure (trial/ activated) and a form is customized to contain the web resource.
- By default, when the form loads the activity timeline will load the related activities and notes in single timeline view for that record.



- At the top of activity, the timeline is the activity toolbar where one can add a new activity. It opens the default CRM form for activity.
- In the main pane are the set of activities that have occurred with clearly marked icons and grouped by month and year.
- Each activity has the contextual inline actions which is displayed when green bar with three dots.



- All the activities will have two actions at minimum, first is the "Details" action to view the details & edit the activity and second is the "Delete Activity" to delete the same provided you have rights to do so.
- Each activity has a status identifier which indicates what is the current status of the activity such as the draft, completed etc.
- A note is a special type of activity that has inline actions i.e. users can create, delete and edit notes directly within the activity view. Below diagram depicts the inline operations for notes.



- File attachment to notes can be downloaded by clicking on the name.
- File attachment can be deleted by clicking on the delete icon in line with file name.

Support

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