

D365 Icons and Tooltips

USER GUIDE

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1 Introduction

1.1 Problems

Regarding to Microsoft document, you can [display custom icons instead of values in list views](#). But you need: *Administrators and customizers can add graphics to a view and establish the logic used to select the graphic based on a column values using JavaScript. The capability to display list views that show icons rather than text or numerical values in some columns was introduced in Relationship Insights.*

Topic	Actual Revenue	Rating	Contact	Est. Close Date	Est. Revenue
Very likely will order 73 Pr...	\$153,385.37	Cold	Rene Valdes (sa...	4/9/2016	\$16,000.00
Some interest in our JJ line...	\$94,800.82	Warm	Nancy Anderson...	7/29/2016	\$95,000.00
Very interested in our prod...	\$40,201.49	Hot	Scott Konersma...	7/6/2016	\$40,000.00
10 orders of Product SKU J...	\$22,469.39	Hot	Yvonne McKay (...	7/27/2016	\$22,000.00
10 orders or Product SKU ...	\$14,589.45	Warm	Susanna Stubbe...	6/9/2016	\$15,000.00

After your developer coding with JavaScript code, you get the result only on this view. Another view, your developer should do it again, again and again....

1.2 D365 Icons and Tooltips solution

With **D365 Icons and Tooltips** you (Salesperson, Sales manager, Customizer, Administrator ...) can:

- Easy to use the add-on.
- Easy define icons and tooltips for each view, **DON'T need to know JavaScript**.
- Easy hide columns.
- Included some icons collection.
- You can install more icons collection with a separator solution.
- You can create your icons collection.
- Control which users can use **D365 Icons and Tooltips**.
- **Dynamics 365 supported customize**.
- Define one, can view on: Web Desktop, Unified Client Interface, Unified Service Desk, and Dynamics 365 App for Outlook.

2 Supported versions, Install and Un-install

2.1 Supported versions

- From Dynamics 365 v.9.0

2.2 Install

- Please go to [AppSource](#) and search **D365 Icons and Tooltips** then install

2.3 Un-install

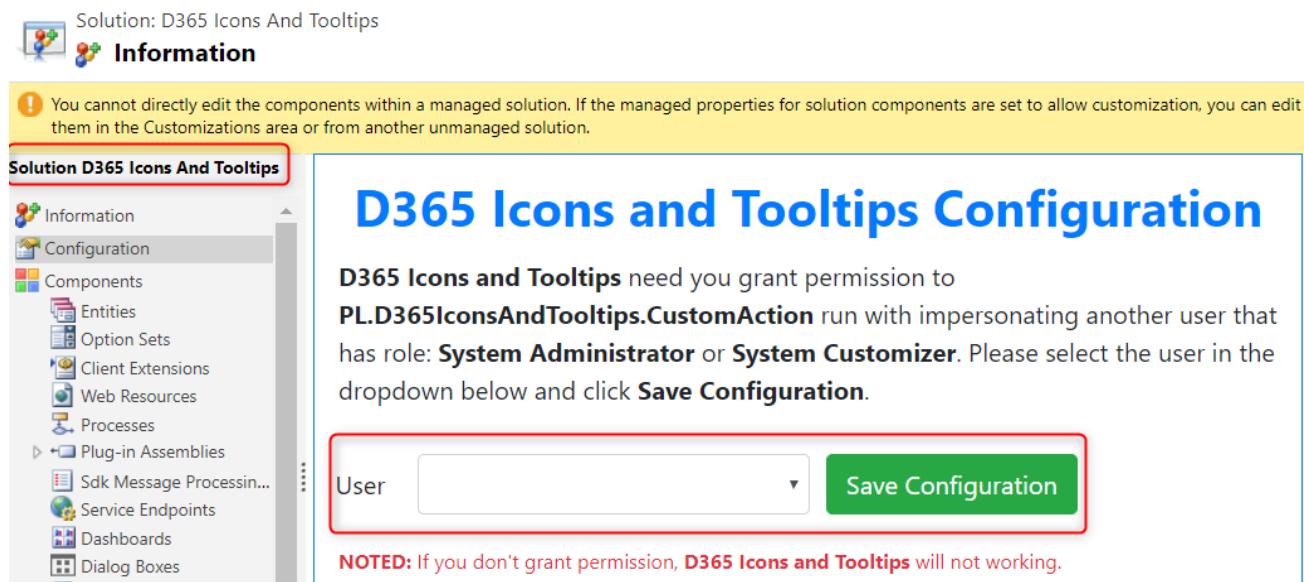
- Go to: **Settings -> Solutions**

- Select **D365 Icons and Tooltips** record then click the **Delete** button to un-install **D365 Icons and Tooltips** solution.

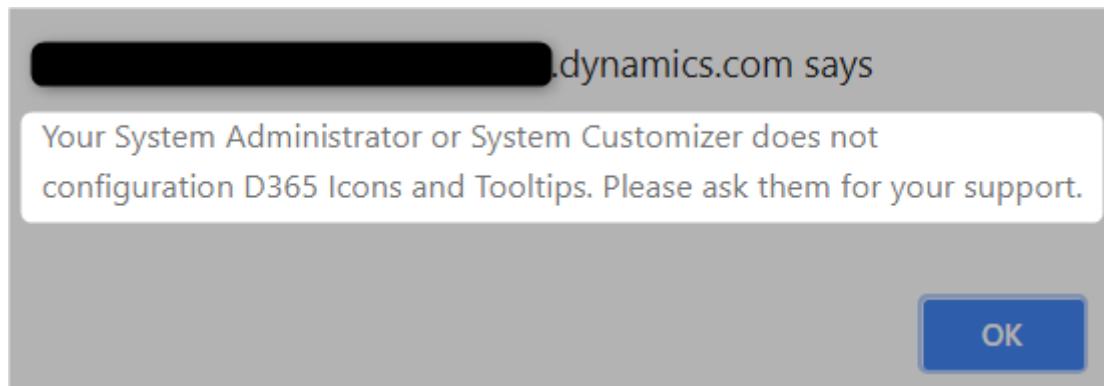
3 Grant Permission!!! Important!!!

Before use **D365 Icons and Tooltips**, you need **grant permission** to **D365 Icons and Tooltips** run with impersonating another user.

After you install solution, open **D365 Icons and Tooltips** solution, select **Configuration** in the left navigation tree, and then select user you want to grant permission.



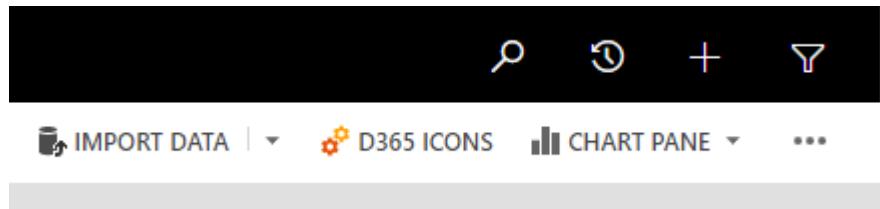
NOTE: If you don't grant permission, when users access **D365 Icons and Tooltips**, users see the message below.



4 Access and Permission

4.1 Access

There is **one way** you can access **D365 Icons and Tooltips**, from home page of the entity.



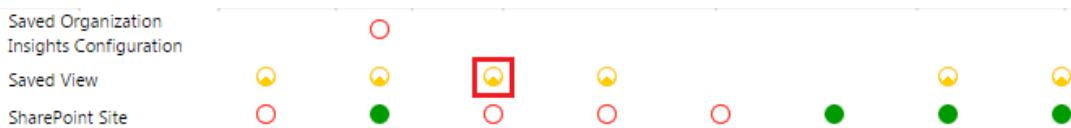
4.2 Permission

4.2.1 System Views

User need belong role: **System Administrator** and/or **System Customizer** to use **D365 Icons and Tooltips** to define these system views.

4.2.2 Personal Views

User need have a **write privilege on Saved View** to use **D365 Icons and Tooltips** to define these personal views.



5 Restrict user access D365 Icons and Tooltips

By default, when you installed **D365 Icons and Tooltips**, user who has these permissions bellow can use **D365 Icons and Tooltips**.

- User who has **System Administrator** security role and/or (for System Views)
- User who has **System Customizer** security role and/or (for System Views)
- User who has **write permission** on **Saved View** entity (for Personal Views)

But sometimes **you don't want** these users' access **D365 Icons and Tooltips** without revoke these accesses you define before. **D365 Icons and Tooltips** has an empty security role name: **D365 Icons and Tooltips - Access Denied**. You can assign this security role to user that you want to remove access **D365 Icons and Tooltips**.

6 Force Re-Saving

For some reasons, your views lost the configured **D365 Icons and Tooltips**. To fix it, your IT Admin should open **D365 Icons and Tooltips** solution, select **Configuration** in the left navigation tree, and press the button **Force Re-Saving** to force saving all data. After that, the IT Admin should **Publish All Customizations** and then your configured **D365 Icons and Tooltips** will back.

D365 Icons and Tooltips Configuration

Want permission to **PL.D365IconsAndToolTips.CustomAction** run with impersonating another user that has role: **System Administrator**. Please select the user in the dropdown below and click **Save Configuration**.

	Save Configuration	Force Re-Saving
--	--------------------	-----------------

7 Create your Icons collection

You can create your Icons collection work with **D365 Icons and Tooltips** by following tasks hereby

7.1 Create a new solution

- Solution display name: should begin **D365 Icons and Tooltips - Icons Collection -**
- Solution name: should begin: **D365IconsAndToolTipsIconsCollection**
- Description: should correct syntax [{ "Name": "MyIcons", "From": "1", "To": "3", "Prefix": "../abc_/", "Provider": "MyIcons", "CategoryId": "100", "Url": "http://yourwebsite.com", "Extension": "png" }]

7.2 Prepare your icons

- Size: 16x16 or 24x24 or 48x48
- Extension: .png or .gif or .svg
- File name: 1.png, 2.png, 3.png....

7.3 Create WebResources

- Name: **/i/100/1.png - 100 is CategoryId and 1 is start collection.**
- Display Name: **abc_/_i/100/1.png**
- Description: **1.0.0 or keep it blank**
- Type: **PNG format** - your icon extension
- Language: **English**
- Upload file: **1.png** - your upload icon file.

7.4 Publish your solution

- Go to **D365 Icons and Tooltips** check your new icons collection

7.5 Example

The screenshot shows the configuration page for creating a new solution. The fields are as follows:

- Display Name ***: D365 Icons And Tooltips - Icons Collection - My Icons Collection (highlighted with a red circle labeled 1)
- Name ***: D365IconsAndToolTipsIconsCollectionMyIcons (highlighted with a red circle labeled 2)
- Publisher ***: D365 Icons And Tooltips Publisher
- Configuration Page**: (empty)
- Version ***: 1.0.0
- Description**: (empty)
- Code Editor** (highlighted with a red circle labeled 3):


```
[{"Name": "MyIcons", "From": "1", "To": "3", "Prefix": "../abc_/", "Provider": "MyIcons", "CategoryId": "100", "Url": "http://yourwebsite.com", "Extension": "png"}]
```

6.1 – Create your Icons collection solution

 Solution: D365 Icons And Tooltips - Icons Collection - My Icons Collection

Web Resource: New

General

Name *	abc_	/i/100/1.png	1
Display Name	abc_i/100/1.png		2
Description	1.0.0		

Content

Type *	PNG format	4
Language	English	
Upload File	Choose File	1.png

6.3 – Create WebResource

Component Type		Web Resource	▼	View	Customizable
 New	 Add Existing	 Delete	 Remove	 Publish	 Show Dependencies
 Managed Properties	More Actions ▾			 Add Required Components	
✓	Display Name ↑	Name	Type		Customizable
	abc_i/100/1.png	abc_i/100/1.png	PNG format	Unmanaged	True
	abc_i/100/2.png	abc_i/100/2.png	PNG format	Unmanaged	True
	abc_i/100/3.png	abc_i/100/3.png	PNG format	Unmanaged	True

6.3 – Create more WebResource



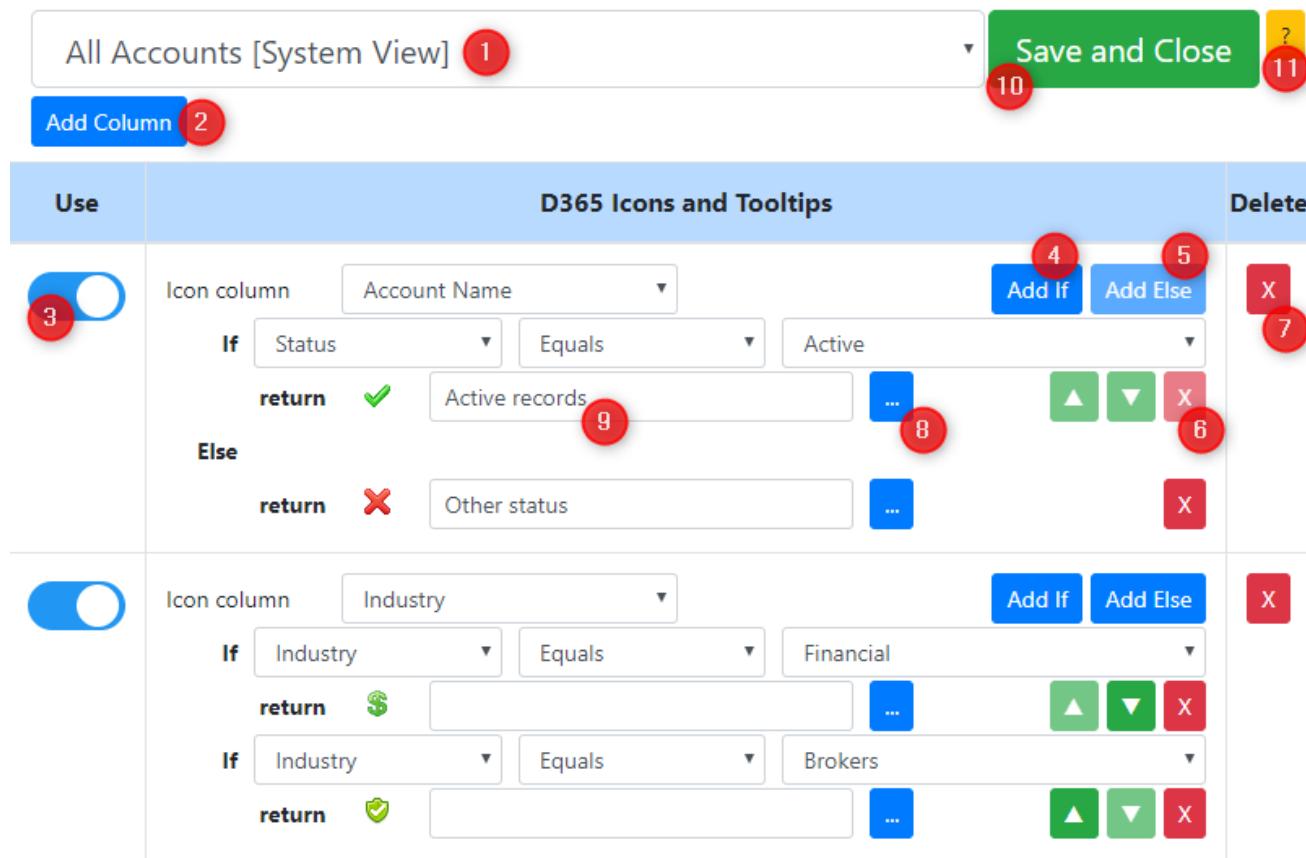
- Double click on image to select and close
- Free icon collection from [MyIcons](#)
- Download more [icons collection](#)

[Close](#)[Save And Close](#)

6.4 Your Icons collection

8 Working with D365 Icons and Tooltips

8.1 D365 Icons and Tooltips window dialog



- 1 List all **System Views** or **Personal Views**
- 2 Add column to define **D365 Icons and Tooltips**
- 3 Enable or Disable column
- 4 Add If condition clause
- 5 Add Else clause
- 6 Delete If/Else clause, Move Up, Move Down clause
- 7 Delete define column
- 8 Select icon from icons collection
- 9 Tooltip for icon
- 10 Save and Close
- 11 Parameters and Help

D365 Icons and Tooltips

The screenshot shows a user interface for managing columns. At the top, there are dropdown menus for 'Account' and 'All Accounts [System View]', a green 'Save' button, and a help icon. Below these are buttons for 'Add Column', 'Icon Columns' (highlighted with a red circle labeled 1), and 'Hide Columns'. The main area displays a table with a header 'D365 Icons and Tooltips' and a 'Delete' column. Two rows are visible: one for 'Status' (with a red circle labeled 2) and one for 'Status Reason' (with a red circle labeled 3). Each row has a dropdown arrow and a delete button.

1 Help you hide columns

2 Hide columns

3 Delete

*Note: this is new in version 1.2.0

8.2 D365 Icons and Tooltips parameters

8.2.1 CURRENT_USER

- Description: get current username
- Example [CURRENT_USER](#)

8.2.2 TODAY

- Description: get current date (get date from client user login)
- Example [TODAY](#)

8.2.3 CURRENT_YEAR

- Description: get current year (get date from client user login)
- Example [CURRENT_YEAR](#)

8.2.4 YEAR(year)

- Description: get exact the year in parameter, can combine with CURRENT_YEAR
- Parameter is number and format is: 0000
- Example [YEAR\(year\)](#)

8.2.5 CURRENT_MONTH

- Description: get the current month (get date from client user login)
- Example [CURRENT_MONTH](#)

8.2.6 MONTH(month)

- Description: get exact the month in parameter, can combine with CURRENT_MONTH
- Parameter is number and format is: 00

- Example [MONTH\(month\)](#)

8.2.7 CURRENT_DAY

- Description: get the current day (get date from client user login)
- Example [CURRENT_DAY](#)

8.2.8 DAY(day)

- Description: get exact the day in parameter, can combine with [CURRENT_DAY](#)
- Parameter is number and format is: 00
- Example [DAY\(day\)](#)

8.2.9 DAY_AND_MONTH(day, month)

- Description: get the Day, the Month in the parameter, can combine with [CURRENT_DAY](#), [CURRENT_MONTH](#)
- Example [DAY AND MONTH\(day, month\)](#)

8.2.10 DAY_AND_YEAR(day, year)

- Description: get the Day, the Year in the parameter, can combine with [CURRENT_DAY](#), [CURRENT_YEAR](#)
- Example [DAY AND YEAR\(day, year\)](#)

8.2.11 MONTH_AND_YEAR(month, year)

- Description: get the Month, the Year in the parameter, can combine with [CURRENT_MONTH](#), [CURRENT_YEAR](#)
- Example [MONTH AND YEAR\(month, year\)](#)

8.2.12 ADD_DAYS(date, days)

- Description: add or subtract days with date and return a new date.
- Parameter days is negative number mean subtract days, otherwise add days.
- Example [ADD_DAYS\(date, days\)](#)

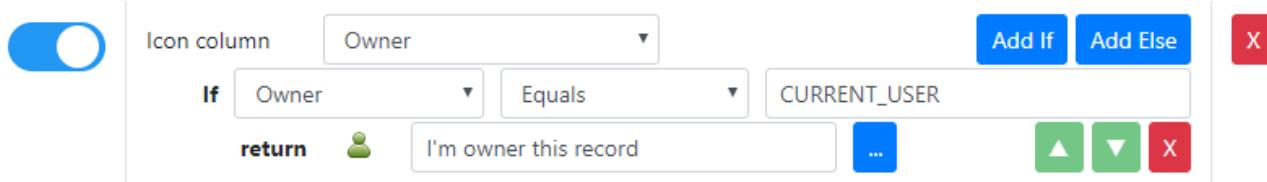
8.2.13 DAY OF WEEK

- Description: get the day of week by text
- MONDAY, TUESDAY, WEDNESDAY, THURSDAY, FRIDAY, SATURDAY, SUNDAY
- Example [DAY-OF-WEEK](#)

9 Parameters

9.1 CURRENT_USER

9.1.1 Define



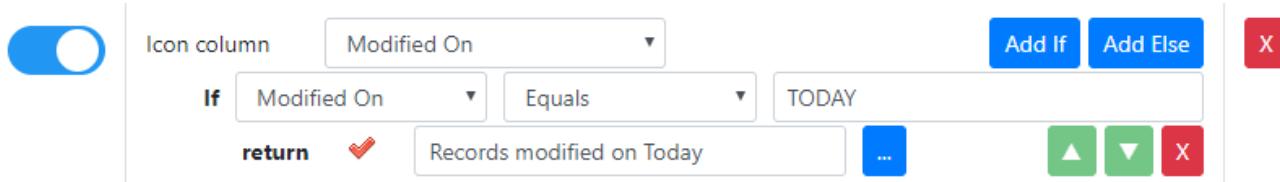
9.1.2 Result

→ Active Accounts ▾

	Owner	Account Name ↑	Industry	Primary Contact
	MOD Administrator	A. Datum Corporation (sa...)	Accounting	Rene Valdes (sample)
	Team Sales	Adventure Works (sample)	Brokers	Nancy Anderson (sample)
	Sales 1 Person	Alpine Ski House (sample)	Accounting	Paul Cannon (sample)
	MOD Administrator	Blue Yonder Airlines (samp...	Insurance	Sidney Higa (sample)
	Sales 2 Person	Coho Winery (sample)	Consulting	Jim Glynn (sample)
	MOD Administrator	Contoso Pharmaceuticals (...)	Brokers	Robert Lyon (sample)
	Team Sales	Fabrikam, Inc. (sample)	Brokers	Maria Campbell (sample)
	MOD Administrator	Fabrikam, Inc. (sample)		Maria Campbell (sample)
	MOD Administrator	Fourth Coffee (sample)	Consulting	Yvonne McKay (sample)
	Sales 2 Person	Litware, Inc. (sample)	Consulting	Susanna Stubberod (sampl...

9.2 TODAY

9.2.1 Define



9.2.2 Result

→ All Accounts Industry ▾

<input type="checkbox"/>	Modified On	Industry	Account Name ↑	Main Phone
	✓ 6/11/2018 2:23 PM	会计 (Accounting)	A. Datum Corporation (sample)	555-0159
	✓ 6/11/2018 8:55 AM	经纪人 (Brokers)	Adventure Works (sample)	555-0152
	6/7/2018 12:25 PM	会计 (Accounting)	Alpine Ski House (sample)	555-0157
	6/7/2018 12:25 PM	保险 (Insurance)	Blue Yonder Airlines (sample)	555-0154
	6/7/2018 12:25 PM	会计 (Accounting)	City Power & Light (sample)	555-0155
	✓ 6/11/2018 8:55 AM	咨询 (Consulting)	Coho Winery (sample)	555-0159
	6/7/2018 12:25 PM	经纪人 (Brokers)	Contoso Pharmaceuticals (sample)	555-0156
	6/7/2018 12:25 PM	经纪人 (Brokers)	Fabrikam, Inc. (sample)	555-0153
	6/7/2018 12:25 PM		Fabrikam, Inc. (sample)	555-0165
	6/7/2018 12:25 PM	咨询 (Consulting)	Fourth Coffee (sample)	555-0150

9.3 CURRENT_YEAR

9.3.1 Define

The screenshot shows a configuration interface for a tooltip rule. On the left is a blue toggle switch. Next to it, 'Icon column' is set to 'Topic'. Below this, there's a conditional logic section: 'If' 'Est. Close Date' 'Equals' 'CURRENT_YEAR'. To the right of the condition is a 'return' field containing 'Est. Close Date this year', followed by a red heart icon. At the top right are 'Add If' and 'Add Else' buttons, and a red 'X' button at the far right.

9.3.2 Result

↳ All Opportunities ▾

<input type="checkbox"/>	Topic ↑	Status	Est. Close Date	Potential Cust...	Email Address	Actual Close ...
	Heart 10 orders of Product SKU J...	Won	5/22/2018	Fourth Coffee...		5/17/2018
	Heart 10 orders or Product SKU ...	Won	4/4/2018	Litware, Inc. (...		4/10/2018
	Heart 6 orders of Product SKU JJ...	Open	7/7/2018	Fabrikam, Inc....		6/6/2018
	Interested in online only st...	Open	2/8/2019	Fabrikam, Inc....		
	Heart Needs to restock their sup...	Open	9/5/2018	Blue Yonder ...		6/6/2018
	Heart Some interest in our JJ line...	Won	5/24/2018	Adventure W...		5/21/2018
	Heart They sell many of the sam...	Open	11/10/2018	Contoso Phar...		6/6/2018
	Heart Very interested in our pro...	Won	5/1/2018	City Power & ...		4/17/2018
	Very likely will order 18 Pr...	Open	10/7/2019	Alpine Ski Ho...		6/6/2018
	Heart Very likely will order 73 Pr...	Won	2/4/2018	A. Datum Cor...		1/23/2018

9.4 YEAR(year)

9.4.1 Define

Icon column: Est. Close Date

If: Est. Close Date Equals YEAR(2018)

return: Est. Close in 2018

Add If | Add Else | X

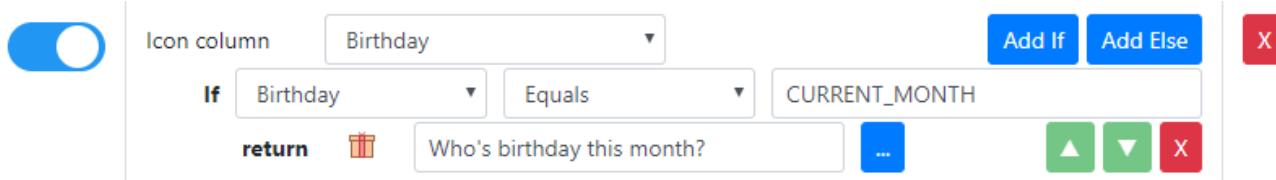
9.4.2 Result

⇒ Open Opportunities ▾

<input type="checkbox"/>	Topic	Est. Close Date	Potential Customer ↑	Est. Revenue	Contact	Account
	❤️ Very likely will order 18...	10/7/2019	Alpine Ski House (sam...)	\$30,000.00	Paul Cannon (...)	Alpine Ski Ho...
	⚠️ Needs to restock their ...	9/5/2018	Blue Yonder Airlines (s...	\$25,000.00	Sidney Higa (...)	Blue Yonder ...
	❤️ Will be ordering about...	12/8/2018	Coho Winery (sample)	\$25,000.00	Jim Glynn (sa...)	Coho Winery ...
	✓ They sell many of the s...	11/10/2018	Contoso Pharmaceutical...	\$26,000.00	Robert Lyon (...)	Contoso Phar...
	❤️ 6 orders of Product SK...	7/7/2018	Fabrikam, Inc. (sample)	\$10,000.00	Maria Campb...	Fabrikam, Inc....
	✓ Interested in online onl...	2/8/2019	Fabrikam, Inc. (sample)		Maria Campb...	Fabrikam, Inc....

9.5 CURRENT_MONTH

9.5.1 Define



9.5.2 Result

❖ All Contacts ▾

<input type="checkbox"/>	Full Name	Birthday	Status	Email	Company Name	Business
✓	Yvonne McKay (sample)	6/16/1954	Active	someone_a@example....	Fourth Coffee (sample)	555-010
✗	Susanna Stubberod ...	12/10/19... ...	Inactive	someone_b@example....	Litware, Inc. (sample)	555-010
✓	Nancy Anderson (sa...	6/22/1960	Active	someone_c@example....	Adventure Works (sa...	555-010
✓	Maria Campbell (sa...	1/14/1962	Active	someone_d@example....	Fabrikam, Inc. (sample)	555-010
✗	Sidney Higa (sample)	3/7/1966	Inactive	someone_e@example....	Blue Yonder Airlines (s...	555-010
✓	Scott Konersmann (...	6/17/1977	Active	someone_f@example....	City Power & Light (sa...	555-010
✓	Robert Lyon (sample)	3/12/1978	Active	someone_g@example....	Contoso Pharmaceutic...	555-010
✗	Paul Cannon (sample)	7/5/1966	Inactive	someone_h@example....	Alpine Ski House (sam...	555-010
✓	Rene Valdes (sample)	11/22/19... ...	Active	someone_i@example....	A. Datum Corporation...	555-010
✓	Jim Glynn (sample)	3/2/1959	Active	someone_j@example....	Coho Winery (sample)	555-010

9.6 MONTH(month)

9.6.1 Define

Icon column: Actual Close Date

If: Actual Close Date Equals MONTH(7)

return: Actual Close Date in July

Add If | Add Else | X

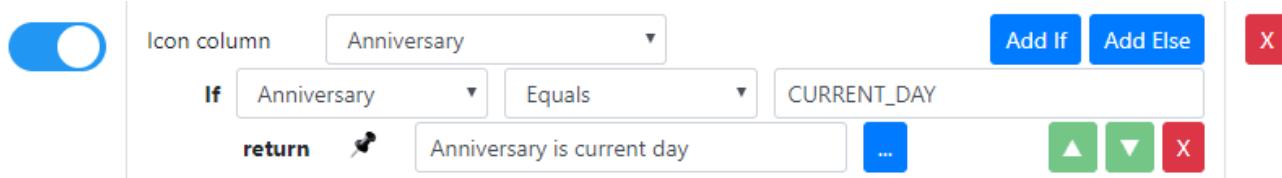
9.6.2 Result

→ All Opportunities ▾

<input type="checkbox"/>	Topic ↑	Actual Close ...	Status	Est. Close Date	Potential Cust...	Email Address	Actual Re...
	✓ 10 orders of Produ...	5/17/2018	Won	5/22/2018	Fourth Coffee...		\$22,
	✓ 10 orders or Prod...	4/10/2018	Won	4/4/2018	Litware, Inc. (...		\$14,
	⌚ 6 orders of Produc...	7/6/2019	Open	7/7/2018	Fabrikam, Inc....		
	⌚ Interested in onlin...	7/11/2018	Open	7/8/2019	Fabrikam, Inc....		
	⌚ Needs to restock t...	6/6/2018	Open	9/5/2018	Blue Yonder ...		
	✓ Some interest in o...	5/21/2018	Won	5/24/2018	Adventure W...		\$94,
	⌚ They sell many of ...	6/6/2018	Open	11/10/2018	Contoso Phar...		
	✓ Very interested in ...	4/17/2018	Won	5/1/2018	City Power & ...		\$40,
	⌚ Very likely will ord...	6/6/2018	Open	10/7/2019	Alpine Ski Ho...		
	✓ Very likely will ord...	1/23/2018	Won	2/4/2018	A. Datum Cor...		\$153,
	—						

9.7 CURRENT_DAY

9.7.1 Define



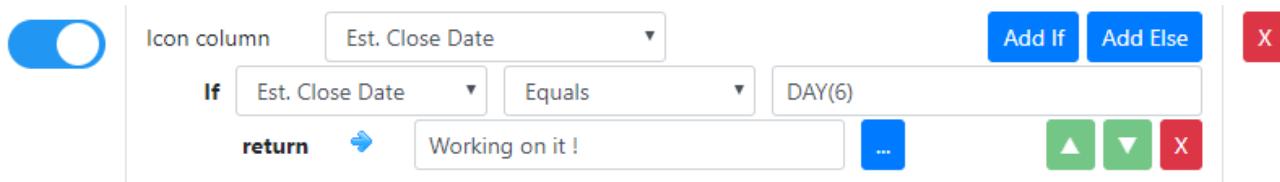
9.7.2 Result

My Active Contacts

<input type="checkbox"/>	Full Name ↑	Anniversary	Email	Company Name	Business Phone
	Maria Campbell ...	8/13/1979	someone14@example....	Fabrikam, Inc. (sample)	555-0165
	Nancy Anderson...	1/1/2007	someone_c@example....	Adventure Works (sa...	555-0102
	Rene Valdes (sa...	3/22/1980	someone_j@example....	A. Datum Corporation...	555-0108
	Robert Lyon (sa...	11/15/2011	someone_g@example....	Contoso Pharmaceutic...	555-0106
	Susan Burk (sam...	11/13/1972	someone_l@example....	A. Datum Corporation...	555-0111
	Yvonne McKay (...	4/2/1983	someone_a@example....	Fourth Coffee (sample)	555-0100

9.8 DAY(day)

9.8.1 Define



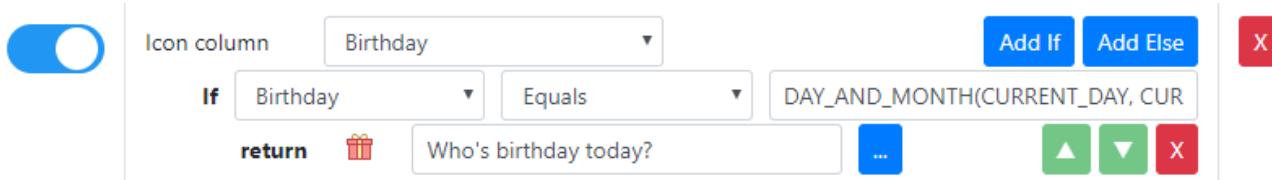
9.8.2 Result

↳ All Leads ▾

	Name	Est. Close Dat...	Topic	Owner	Status Reason	Created On
	Susanna Stubberod (sa...)	6/6/2018	Mailed an interest car...	MOD Admini...	New	6/6/2018 7:56 P
	Nancy Anderson (samp...	7/27/2018	New store opened thi...	MOD Admini...	Lost	6/6/2018 7:56 P
	Maria Campbell (sample)	6/6/2018	Interested in online on...	MOD Admini...	New	6/6/2018 7:56 P
	Peter Houston (sample)	9/22/2018	Good prospect (sample)	MOD Admini...	Lost	6/6/2018 7:56 P
	Ivan Komashinsky (sam...	3/6/2018	Interested in our newe...	MOD Admini...	New	6/6/2018 7:56 P
	Lidman Anna (sample)	2/6/2018	Some interest in our p...	MOD Admini...	New	6/6/2018 7:56 P
	Robin Counts (sample)	9/15/2018	Likes our products (sa...	MOD Admini...	No Long...	6/6/2018 7:56 P
	Counts Vong (sample)	11/10/20...	Follow-up with inform...	MOD Admini...	New	6/6/2018 7:56 P
	Debra Garcia (sample)	6/1/2018	Store is expanding - s...	MOD Admini...	Cannot C...	6/6/2018 7:56 P
	Yvonne McKay (sample)	10/20/20...	New store opened thi...	MOD Admini...	New	6/6/2018 7:56 P

9.9 DAY_AND_MONTH(day, month)

9.9.1 Define



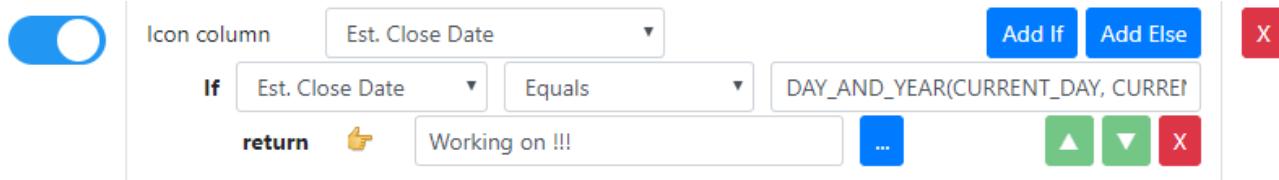
9.9.2 Result

↳ All Contacts ▾

<input type="checkbox"/>	Full Name	Birthday	Status	Email	Company Name	Business
Heart	Yvonne McKay (sam...)	Gift	6/13/1968 Active	someone_a@example....	Fourth Coffee (sample)	555-0100
Heart	Susanna Stubber...		12/10/1989 Inactive	someone_b@example....	Litware, Inc. (sample)	555-0101
Heart	Nancy Anderson (...)	Gift	6/13/1999 Active	someone_c@example....	Adventure Works (sa...	555-0102
Heart	Maria Campbell (s...		1/14/1962 Active	someone_d@example....	Fabrikam, Inc. (sample)	555-0103
Heart	Sidney Higa (sam...		3/7/1966 Inactive	someone_e@example....	Blue Yonder Airlines (s...	555-0104
Heart	Scott Konersman...		6/14/1989 Active	someone_f@example....	City Power & Light (sa...	555-0105
Heart	Robert Lyon (sam...		3/12/1978 Active	someone_g@example....	Contoso Pharmaceutic...	555-0106
Heart	Paul Cannon (sam...		7/5/1966 Inactive	someone_h@example....	Alpine Ski House (sam...	555-0107
Heart	Rene Valdes (sam...		11/22/1984 Active	someone_i@example....	A. Datum Corporation...	555-0108
Heart	Jim Glynn (sample)		3/2/1959 Active	someone_j@example....	Coho Winery (sample)	555-0109

9.10 DAY_AND_YEAR(day, year)

9.10.1 Define



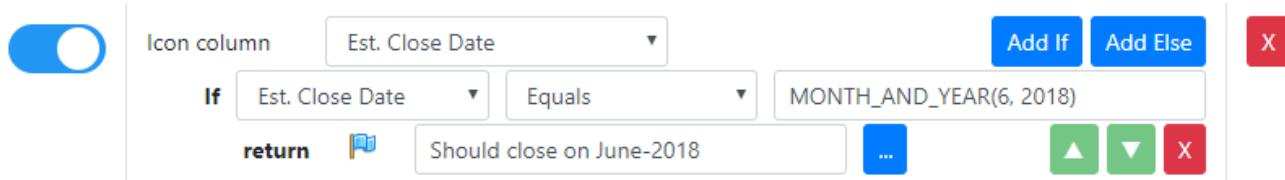
9.10.2 Result

↳ All Leads ▾

<input type="checkbox"/>	Name	Est. Close Date	Topic	Owner	Status Reason	Created On
	Susanna Stubberod ...	5/13/2018	Mailed an interest car...	MOD Admini...	New	6/6/2018 7:56 PM
	Nancy Anderson (sa...	7/27/2018	New store opened thi...	MOD Admini...	Lost	6/6/2018 7:56 PM
	Maria Campbell (sa...	7/13/2018	Interested in online on...	MOD Admini...	New	6/6/2018 7:56 PM
	Peter Houston (sam...	9/22/2018	Good prospect (sample)	MOD Admini...	Lost	6/6/2018 7:56 PM
	Ivan Komashinsky (s...	9/13/2018	Interested in our newe...	MOD Admini...	New	6/6/2018 7:56 PM
	Lidman Anna (samp...	12/13/20...	Some interest in our p...	MOD Admini...	New	6/6/2018 7:56 PM
	Robin Counts (samp...	9/15/2018	Likes our products (sa...	MOD Admini...	No Long...	6/6/2018 7:56 PM
	Counts Vong (sampl...	11/10/20...	Follow-up with inform...	MOD Admini...	New	6/6/2018 7:56 PM
	Debra Garcia (samp...	6/1/2018	Store is expanding - s...	MOD Admini...	Cannot C...	6/6/2018 7:56 PM
	Yvonne McKay (sam...	10/20/20...	New store opened thi...	MOD Admini...	New	6/6/2018 7:56 PM

9.11 MONTH_AND_YEAR(month, year)

9.11.1 Define



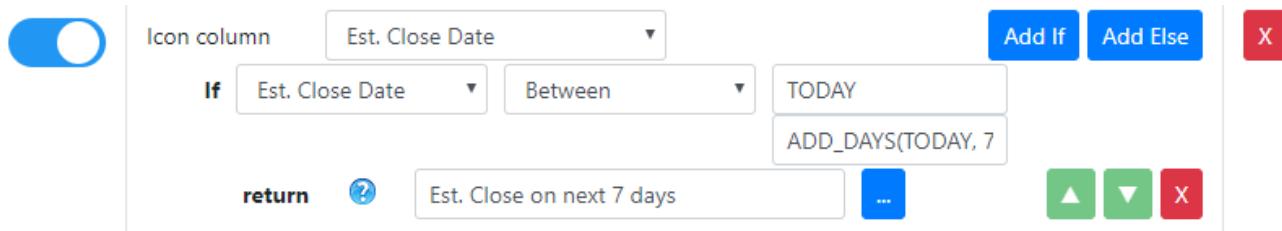
9.11.2 Result

↳ All Opportunities ▾

<input type="checkbox"/>	Topic ↑	Est. Close Dat...	Status	Potential Cust...	Email Address	Actual Reven...	Est. Revenue
	10 orders of Product...	5/22/2018	Won	Fourth Coffee...		\$22,469.39	\$22,000
	10 orders or Product...	4/4/2018	Won	Litware, Inc. (...)		\$14,589.45	\$15,000
	6 orders of Product ...	6/7/2018	Open	Fabrikam, Inc....			\$10,000
	Interested in online ...	7/8/2019	Open	Fabrikam, Inc....			
	Needs to restock th...	6/5/2018	Open	Blue Yonder ...			\$25,000
	Some interest in ou...	5/24/2018	Won	Adventure W...		\$94,800.82	\$95,000
	They sell many of t...	11/10/20...	Open	Contoso Phar...			\$26,000
	Very interested in o...	5/1/2018	Won	City Power & ...		\$40,201.49	\$40,000
	Very likely will orde...	6/7/2018	Open	Alpine Ski Ho...			\$30,000
	Very likely will orde...	2/4/2018	Won	A. Datum Cor...		\$153,385.37	\$16,000

9.12 ADD_DAYS(date, days)

9.12.1 Define



9.12.2 Result

❖ All Opportunities ▾

	Topic ↑	Est. Close Dat...	Status	Potential Cust...	Email Address	Actual Reven...	Est. Revenue
★	10 orders of Prod...	5/22/2018	Won	Fourth Coffee...		\$22,469.39	\$22,000.00
★	10 orders or Prod...	4/4/2018	Won	Litware, Inc. (...		\$14,589.45	\$15,000.00
👎	6 orders of Produ...	6/7/2018	Lost	Fabrikam, Inc....		\$0.00	\$10,000.00
?	Interested in onli...	6/13/2018	Open	Fabrikam, Inc....			
?	Needs to restock ...	6/15/2018	Open	Blue Yonder ...			\$25,000.00
★	Some interest in ...	5/24/2018	Won	Adventure W...		\$94,800.82	\$95,000.00
?	They sell many of...	11/10/20...	Open	Contoso Phar...			\$26,000.00
★	Very interested in...	5/1/2018	Won	City Power & ...		\$40,201.49	\$40,000.00
?	Very likely will or...	6/16/2018	Open	Alpine Ski Ho...			\$30,000.00
★	Very likely will or...	2/4/2018	Won	A. Datum Cor...		\$153,385.37	\$16,000.00

9.13 DAY-OF-WEEK

9.13.1 Define

Icon column Birthday ▾ Add If Add Else X

If Birthday ▾ Equals MONDAY	return Mo Birth On Monday ... ▲ ▼ X
If Birthday ▾ Equals TUESDAY	return Tu Birth On Tuesday ... ▲ ▼ X
If Birthday ▾ Equals WEDNESDAY	return We Birth On Wednesday ... ▲ ▼ X
If Birthday ▾ Equals THURSDAY	return Th Birth On Thursday ... ▲ ▼ X
If Birthday ▾ Equals FRIDAY	return Fr Birth On Friday ... ▲ ▼ X
If Birthday ▾ Equals SATURDAY	return Sa Birth On Saturday ... ▲ ▼ X
If Birthday ▾ Equals SUNDAY	return Su Birth On Sunday ... ▲ ▼ X

9.13.2 Result

↔ All Contacts ▾

<input type="checkbox"/>	Full Name	Birthday	Status	Email	Company Name	Business
Y	Yvonne McKay (sample)	Th 6/13/1968	Active	someone_a@example....	Fourth Coffee (sample)	555-0100
Y	Susanna Stubber...	Su 12/10/1989	Inactive	someone_b@example....	Litware, Inc. (sample)	555-0101
Y	Nancy Anderson (sa...	Su 6/13/1999	Active	someone_c@example....	Adventure Works (sa...	555-0102
Y	Maria Campbell (sa...	Su 1/14/1962	Active	someone_d@example....	Fabrikam, Inc. (sample)	555-0103
Y	Sidney Higa (sam...	Mo 3/7/1966	Inactive	someone_e@example....	Blue Yonder Airlines (sa...	555-0104
Y	Scott Konersman...	We 6/14/1989	Active	someone_f@example....	City Power & Light (sa...	555-0105
Y	Robert Lyon (sam...	Su 3/12/1978	Active	someone_g@example....	Contoso Pharmaceutical...	555-0106
Y	Paul Cannon (sam...	Tu 7/5/1966	Inactive	someone_h@example....	Alpine Ski House (sam...	555-0107
Y	Rene Valdes (sam...	Th 11/22/1984	Active	someone_i@example....	A. Datum Corporation...	555-0108
Y	Jim Glynn (sample)	Mo 3/2/1959	Active	someone_j@example....	Coho Winery (sample)	555-0109

10 Screenshots

10.1 Web Desktop – All Accounts – System View

The screenshot shows the Microsoft Dynamics 365 Web Desktop interface for the 'All Accounts' system view. The top navigation bar includes links for NEW, DELETE, EMAIL A LINK, RUN REPORT, EXCEL TEMPLATES, EXPORT TO EXCEL, and IMP. The main content area displays a grid of account records with the following columns:

<input type="checkbox"/>	Account Name ↑	Industry	Main Phone	Address 1: City	Primary Contact	Email
<input type="checkbox"/>	A. Datum Corporation (sample)	Accounting	555-0158	Redmond	Rene Valdes (sample)	son
<input type="checkbox"/>	Adventure Works (sample)	Brokers	555-0152	Redmond Santa Cruz	Nancy Anderson (sam...)	son
<input type="checkbox"/>	Alpine Ski House (sample)	Accounting	555-0157	Missoula	Paul Cannon (sample)	son
<input type="checkbox"/>	Blue Yonder Airlines (samp...)	Insurance	555-0154	Los Angeles	Sidney Higa (sample)	son
<input type="checkbox"/>	City Power & Light (sample)	Accounting	555-0155	Redmond	Scott Konersmann (sa...)	son
<input type="checkbox"/>	Coho Winery (sample)	Consulting	555-0159	Phoenix	Jim Glynn (sample)	son
<input type="checkbox"/>	Contoso Pharmaceuticals (...)	Brokers	555-0156	Redmond	Robert Lyon (sample)	son
<input type="checkbox"/>	Fabrikam, Inc. (sample)	Brokers	555-0153	Lynnwood	Maria Campbell (samp...)	son
<input type="checkbox"/>	Fabrikam, Inc. (sample)		555-0165	Cerritos	Maria Campbell (samp...)	son
<input type="checkbox"/>	Fourth Coffee (sample)	Consulting	555-0150	Renton	Yvonne McKay (sample)	son

At the bottom, there is a footer with the text '1 - 11 of 11 (0 selected)' and a navigation bar with letters A through Q.

10.2 Web Desktop – All Accounts Industry – Personal View

NEW | DELETE | EMAIL A LINK | RUN REPORT | EXCEL TEMPLATES | EXPORT TO EXCEL |

All Accounts Industry ▾

<input type="checkbox"/>	Modified On	Industry ↑	Account Name ↑	Main Phone
	6/7/2018...	Heart Fabrikam, Inc. (sample)	Fabrikam, Inc. (sample)	555-0165
	6/8/2018...	Accounting	A. Datum Corporation (sample)	555-0158
	6/7/2018...	Accounting	Alpine Ski House (sample)	555-0157
	6/7/2018...	Accounting	City Power & Light (sample)	555-0155
Heart	6/11/201...	Brokers	Adventure Works (sample)	555-0152
	6/7/2018...	Brokers	Contoso Pharmaceuticals (sample)	555-0156
	6/7/2018...	Brokers	Heart Fabrikam, Inc. (sample)	555-0153
Heart	6/11/201...	Consulting	Coho Winery (sample)	555-0159
	6/7/2018...	Consulting	Fourth Coffee (sample)	555-0150
	6/7/2018...	Consulting	Heart Litware, Inc. (sample)	555-0151

1 - 11 of 11 (0 selected) | All # A B C D E F G H I J K L M N O P Q

10.3 Unified Client Interface – All Accounts – System View

All Accounts

✓	Account Name	Industry	Main Pho...	Address 1: ...	Primary Conta...
✓	A. Datum Corporation (sample)	Accounting	555-0158	Redmond	Rene Valde...
✗	Adventure Works (sample)	Brokers	555-0152	Santa Cruz	Nancy And...
✓	Alpine Ski House (sample)	Accounting	555-0157	Missoula	Paul Cann...
✓	Blue Yonder Airlines (sample)	Insurance	555-0154	Los Angeles	Sidney Hig...
✗	City Power & Light (sample)	Accounting	555-0155	Redmond	Scott Kone...
✓	Coho Winery (sample)	Consulting	555-0159	Phoenix	Jim Glynn (...

1 - 11 of 11 (0 selected)

10.4 Unified Service Desk – All Accounts – System View

Unified Service Desk DASHBOARD MY WORK SEARCH REMINDER APPLICATIONS ▾

New Session X

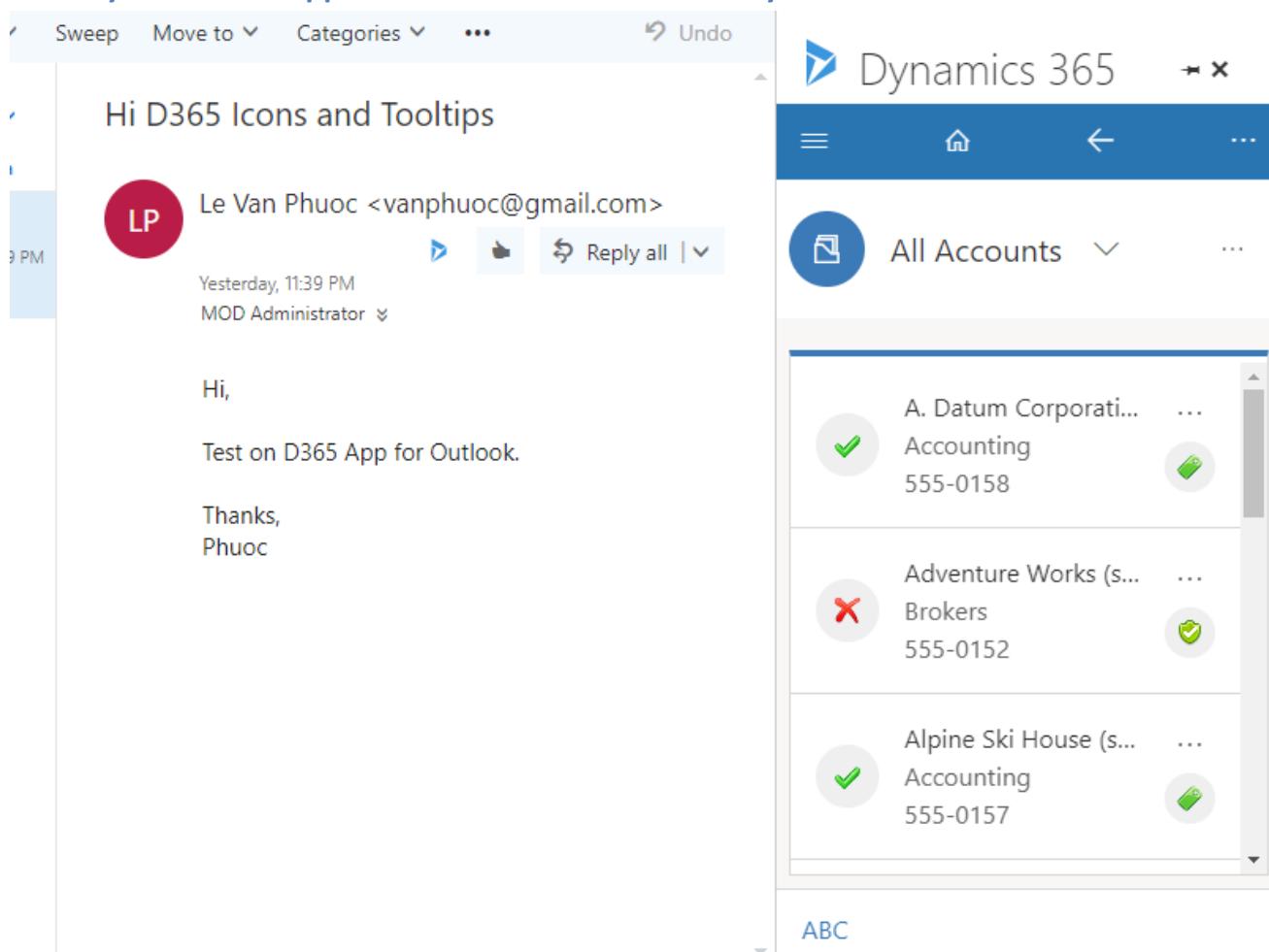
Dashboard (Global) Account Associated Cases Associated Contacts

+ NEW DELETE EMAIL A LINK RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL

All Accounts

<input type="checkbox"/>	Account Name ↑	Industry	Main Phone	Address 1: Cit...	Primary Contact
	A. Datum Corporation (sample)	Accounting	555-0158	Redmond	Rene Valdes (sample)
	Adventure Works (sample)	Brokers	555-0152	Santa Cruz	Nancy Anderson (sample)
	Alpine Ski House (sample)	Accounting	555-0157	Missoula	Paul Cannon (sample)
	Blue Yonder Airlines (sample)	Insurance	555-0154	Los Angeles	Sidney Higa (sample)
	City Power & Light (sample)	Accounting	555-0155	Redmond	Scott Konersman (sample)
	Coho Winery (sample)	Consulting	555-0159	Phoenix	Jim Glynn (sample)
	Contoso Pharmaceuticals (sample)	Brokers	555-0156	Redmond	Robert Lyon (sample)
	Fabrikam, Inc. (sample)	Brokers	555-0153	Lynnwood	Maria Campbell (sample)

10.5 Dynamics 365 App for Outlook – All Accounts – System View



10.6 Web Desktop – Sales Dashboard

SAVE AS NEW | REFRESH ALL ADVANCED FIND

Sales Dashboard

Activity Type	Subject
Task	Evaluation Plan agreed upon (sample)
Phone C...	Likes some of our new products (sample)
Phone C...	availability of Product catalogs (sample)
Phone C...	Very likely will order from us (sample)
Task	Pain admitted by sponsor (sample)

Topic ↑	Potential Cust...	Email Address
10 orders of Pro...	Fourth Coffe...	
10 orders or Pro...	Litware, Inc. ...	
6 orders of Prod...	Fabrikam, In...	
Interested in onl...	Fabrikam, In...	
Needs to restoc...	Blue Yonder ...	

Account Name ↑	Industry	Main Phone
A. Datum Corporation (s...	Accounting	555-
Adventure Works (sample)	Brokers	555-
Alpine Ski House (sample)	Accounting	555-

Sales Pipeline



My Open Opportunities

\$25,000.00

10.7 Web Desktop – Sub-grid

The screenshot illustrates a complex sub-grid structure within a Microsoft Dynamics 365 application. At the top, there's a header bar with standard navigation icons: SIGN, EMAIL A LINK, DELETE, FORM, PROCESS, and three dots for more options. To the right of the header are icons for UP, DOWN, and PASTE.

The main area displays a grid of account information:

	Annual Revenue \$9,980.00	Number of Employees 6,200	Owner* MOD Administrator
--	------------------------------	------------------------------	-----------------------------

Below this, there's a sub-grid for 'ACTIVITIES' containing a single row with a note: 'post here' and a blue 'POST' button.

On the left, a sidebar shows 'Posts' with two items:

- Required Service (sample)**
Case: Created by MOD Administrator for Account A. Datum Corporation (sample).
On Required Service (sample)'s wall
6/6/2018 8:57:06 PM
- Operating manual required (sample)**
Case: Created by MOD Administrator for Account A. Datum Corporation (sample).
On Operating manual required (sample)'s wall
6/6/2018 8:57:06 PM

To the right, there's another sub-grid titled 'CONTACTS' with columns for 'Full Name' and 'Email'. It lists two contacts:

Full Name	Email
Rene Valdes (sa...)	someone_i@example...
Susan Burk (sam...)	someone_l@example...

10.8 Web Desktop – Associated View

The screenshot shows the Dynamics 365 Web Desktop interface. At the top, there is a header bar with a user icon, the text "ACCOUNT", and a dropdown menu showing "A. Datum Corporation (sample)". To the right of the account name is a summary card with "Annual R" and "\$9,980.0". Below the header is a title bar "Contact Associated View". The main content area contains a table with two rows. The first row has a checkbox, the name "Rene Valdes (sample)", and the phone number "555-0108". The second row has a contact icon, the name "Susan Burk (sample)", and the phone number "555-0111". At the bottom of the table is a navigation bar with links for "1 - 2 of 2", "All", "#", and letters A through Q, along with a "Active" link.

	Full Name ↑	Business Phone
	Rene Valdes (sample)	555-0108
	Susan Burk (sample)	555-0111

1 - 2 of 2 | All # A B C D E F G H I J K L M N O P Q
Active

10.9 Web Desktop – Advanced Find

<input type="checkbox"/>	Account Name ↑	Industry	Main Phone	Address 1: City	Primary Contact	Email (Pri)
✓	A. Datum Corporation (sa...)	Accounting	555-0158	Redmond	Rene Valdes (sam...)	someone.
✓	Adventure Works (sample)	Brokers	555-0152	Santa Cruz	Nancy Anderson (...)	someone.
✓	Alpine Ski House (sample)	Accounting	555-0157	Missoula	Paul Cannon (sam...)	someone.
✓	Blue Yonder Airlines (samp...)	Insurance	555-0154	Los Ange...	Sidney Higa (sam...)	someone.
✗	City Power & Light (sample)	Accounting	555-0155	Redmond	Scott Konersman...	someone.
✓	Coho Winery (sample)	Consulting	555-0159	Phoenix	Jim Glynn (sample)	someone.
✓	Contoso Pharmaceuticals (...)	Brokers	555-0156	Redmond	Robert Lyon (sam...)	someone.
✓	Fabrikam, Inc. (sample)	Brokers	555-0153	Lynnwood	Maria Campbell (s...)	someone.
✓	Fabrikam, Inc. (sample)		555-0165	Cerritos	Maria Campbell (s...)	someonel
✓	Fourth Coffee (sample)	Consulting	555-0150	Renton	Yvonne McKay (s...)	someone.
✓	Litware, Inc. (sample)	Consulting	555-0151	Dallas	Susanna Stubber...	someone.

10.10 Web Desktop – Quick Find

<input type="checkbox"/>	Account Name ↑	Account Num...	Primary Contact	Address 1: City	Main
	A. Datum Corporation (sample)		Rene Valdes (sample)	Redmond	555-0
	✓ Adventure Works (sample)	ABC28UU8	Nancy Anderson (sam...)	Santa Cruz	555-0
	✓ Alpine Ski House (sample)	ABCO9M32	Paul Cannon (sample)	Missoula	555-0
	✓ Blue Yonder Airlines (sample)	ACSHN2S4	Sidney Higa (sample)	Los Angeles	555-0
	✓ Fabrikam, Inc. (sample)	AFFSE9IK	Maria Campbell (samp...)	Lynnwood	12345
	✓ Fourth Coffee (sample)	ABSS4G45	Yvonne McKay (sample)	Renton	555-0
	✓ Litware, Inc. (sample)	ACTBBDC3	Susanna Stubberod (s...)	Dallas	555-0

1 - 7 of 7 (0 selected) | All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | ↻

11 License and Price List

11.1 30 days trial license

By default, when install **D365 Icons and Tooltips**, it allows you **30 days trial with full functions**.

When your trial expires. You should purchase a license to continue use **D365 Icons and Tooltips**, otherwise please un-install **D365 Icons and Tooltips**.

11.2 Buy license

499\$ for **1** license per organization with free upgrade and no expire time.

Please contact vanphuoc@outlook.com to make a payment.

12 About PhuocLe

- [Microsoft Dynamics 365 MCSE](#)
- More than 11 years maintain and develop Dynamics 365 (focusing on CRM related modules), from version 4 up to now.

- A lot of experienced working with Dynamics 365 like: develop, code and debug from server side (Plugins, Custom Workflows, Custom Actions) to client side (JavaScript, TypeScript), and experienced integrate with others system using SOAP and/or Web API.
- Experienced working with Dynamics 365 Portals, Field Service, Project Service Automation, Unified Service Desk and Voice of the Customer surveys.
- For ERP related, experienced with integration between Dynamics CRM with Dynamics AX 2012, Dynamics 365 Operations, focusing on data integration of accounts related, invoice related, sales order related.
- Familiar and experienced with various business domains such as food and beverage, information technology, plastic and e-Commerce
- Released [**DynamicsCrm.DevKit**](#) - a Visual Studio extensions - that help CRM developer can easy develop. (<https://github.com/phuocle/Dynamics-Crm-DevKit>)
- Released [**View-FetchXML**](#) - a small tool that help CRM developer easy copy/paste FetchXml code. (<https://github.com/phuocle/View-FetchXML>)
- Released [**CRMCKEditor**](#) - a small webresources that integrated CKEditor with Dynamics CRM. (<https://github.com/phuocle/CRMCKEditor>)
- Release other add-on product [**CRM GRID PLUS**](#) (<http://crmgridplus.com>)
- And his blog <http://phuocle.net>