Hello!

Thank you for your interest in ActivityTools. This Getting Started Guide will help you to install this Add-On from Microsoft AppSource. For detailed information, please take a look at our guides or blogs.

There are basically two ways to install ActivityTools from AppSource:

1. Get solution from Marketplace in Dynamics 365

It is possible to open AppSource directly from Dynamics 365. Therefore, please navigate to Settings > Solutions and hit the [Get Solutions from Marketplace]-button, highlighted in yellow in the figure below.

![Figure 1: Get solutions from Marketplace](image)

This leads you to the AppSource website where you can search for ActivityTools and is described below.

2. Get solution from AppSource
The second option is to go to the AppSource website and search for ActivityTools. Use this link to find all add-ons provided by mscrm-addons.com (figure below).

Next, please select ActivityTools. The so opened window provides you with information regarding AT. Here, please click on the [FREE TRIAL]-button on the left side.

![Figure 2: AppSource – solutions by mscrm-addons.com](image)

![Figure 3: AppSource – ActivityTools](image)
Next, please sign in to Microsoft AppSource. Enter your e-mail address and hit the [Sign in]-button as you can see in the figure below.

![Figure 4: Sign in to Microsoft AppSource](image)

In the window below please check the Microsoft permission checkbox at the bottom. Click on the [Continue]-button to proceed.

![Figure 5: Check the Microsoft permission checkbox](image)

Next, please select the Dynamics 365 organization you want to add the solution to, check the checkboxes below and hit the [Agree]-button.

![Add the application to Dynamics 365](image)
This leads you to your organization overview. The installation takes a while – as you can see ActivityTools has the Status “Installation pending” until the installation is completed (highlighted in yellow).

![Organization overview – AT installation pending](image)

To see when the installation is finished, please refresh the page in between. Only when the status is on “Installed” you can continue with the process (highlighted in yellow below).
Congratulations! You have successfully completed the installation of ActivityTools from Microsoft AppSource. If you now open your Dynamics 365 Settings, you will see the MSCRM-ADDONS section containing the so installed solution – ActivityTools (highlighted in yellow).
A click on ActivityTools leads you to the AT Getting Started page. This provides you with information about the next steps to finalize the setup.

**ASSIGN SECURITY ROLES**

First, you have to assign security roles for the users who should be able to use AT. Therefore, go to Settings > Security and select Users. Please open a user account and click on the ‘Manage roles’-option as you can see it highlighted in yellow below.
In the so opened window please enable the two security roles you can see in the figure below by checking the checkbox.

![Manage User Roles](image)

**Figure 12: Manage user roles**

**2 EMBED ACTIVITYTOOLS**

Next, you have to embed ActivityTools into your Dynamics 365. You can embed AT on your preferred entity. In this case, we select the entity account to show you how it works.

Please navigate to **Settings > Customization** and select **Customize the System** as you can see in the figure below.

![Customization](image)

**Figure 13: Settings - Customize the system**
In the window below, please open the **Account** entity, go to **Forms** and select a form. In this case, we select the form ‘**Account**’.

![Select a form for the entity account](image)

In this example, please navigate to the **Insert**-tab, select **One Column** and click on **Web Resource**. Please fill in the requested fields below.

**IMPORTANT:** Please select as Web resource always ‘**ptm_ActivityTools/MainPage.html**’, which is the container for ActivityTools.

![Define your form](image)

After defining your form, please navigate to the **Home**-tab and hit **Save** and **Publish** in order to see the changes.

**Congratulation!** You have finished the setup of ActivityTools. More information can be found in the corresponding **ActivityTools Installation & Use Guide**.
If you now open an account, ActivityTools provides you with all the activities of this account as you can see in the figure below.

Figure 16: Activities of the selected account
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Contact

For further technical questions, please visit our blog [http://blogs.mscrm-addons.com](http://blogs.mscrm-addons.com) or contact [support@mscrm-addons.com](mailto:support@mscrm-addons.com).

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