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ActivityTools

Getting Started from AppSource

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.

Name	Display Name	Version	Installed On	Package T...	Publisher	Description
msdyn_PowerAppsCh...	PowerApps Checker	1.0.0.103	5/11/2019	Managed	Microsoft Dynamics 365	PowerApps Checker promotes higher-quality mo...
AutoMergeGlobalButt...	AutoMergeGlobalButt...	2017.1	5/9/2019	Managed	PTM EDV Systeme GmbH	
AutoMergeServerCore	DocumentsCorePack b...	2017.5	5/9/2019	Managed	PTM EDV Systeme GmbH	This solution contains basic settings for Docume...
DocumentsCorePackS...	MSCRM-ADDONS.co...	2017.2	5/9/2019	Managed	PTM EDV Systeme GmbH	This solution contains the data for DocumentsCo...
MSCRMADDONScom...	MSCRM-ADDONS.co...	2017.39	5/9/2019	Managed	PTM EDV Systeme GmbH	General MSCRM-ADDONS.com Solution.
msdynce_CRMHub	Crm Hub	1.0.20170...	5/4/2019	Managed	Microsoft Dynamics 365	
Crb330e	Common Data Service...	1.0.0.0	5/3/2019	Unmanag...	CDS Default Publisher	

Figure 1: Get solutions from Marketplace

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).

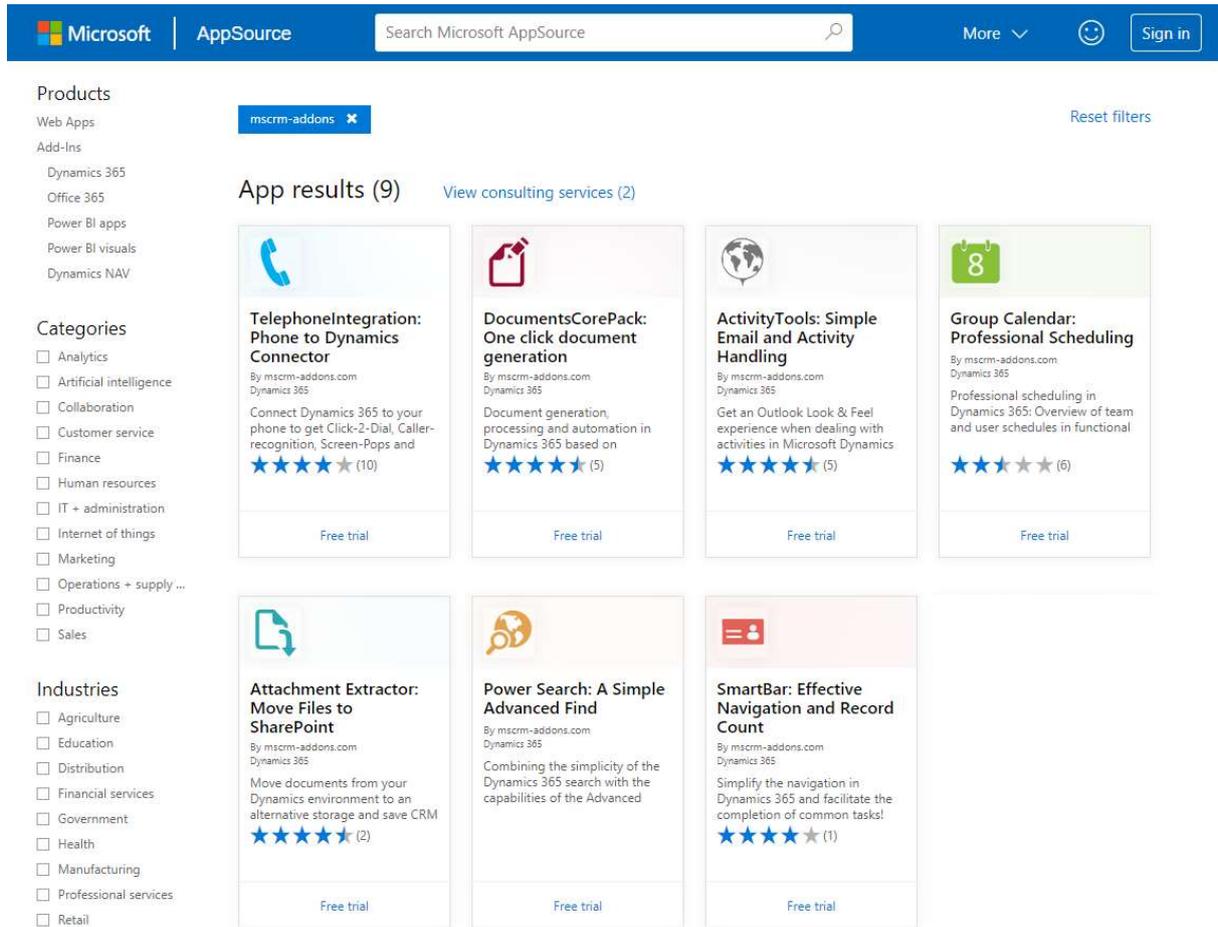


Figure 2: AppSource – solutions by mscrm-addons.com

Next, please click on the **[FREE TRIAL]**-button on the left side. Here, please click on the **[FREE TRIAL]**-button on the left side.

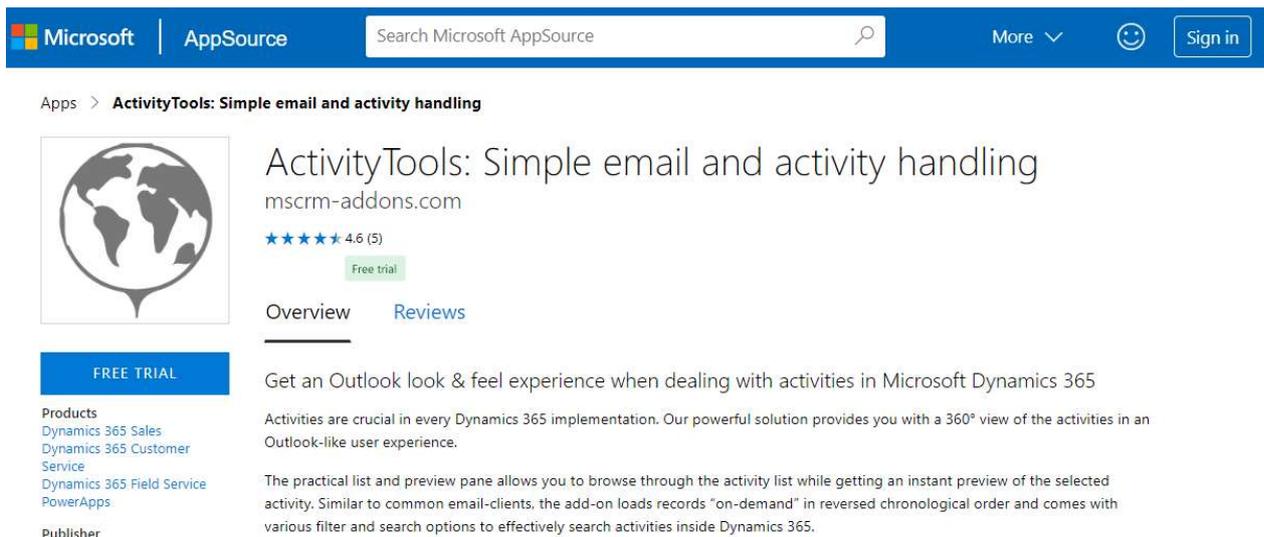


Figure 3: AppSource – ActivityTools

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

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

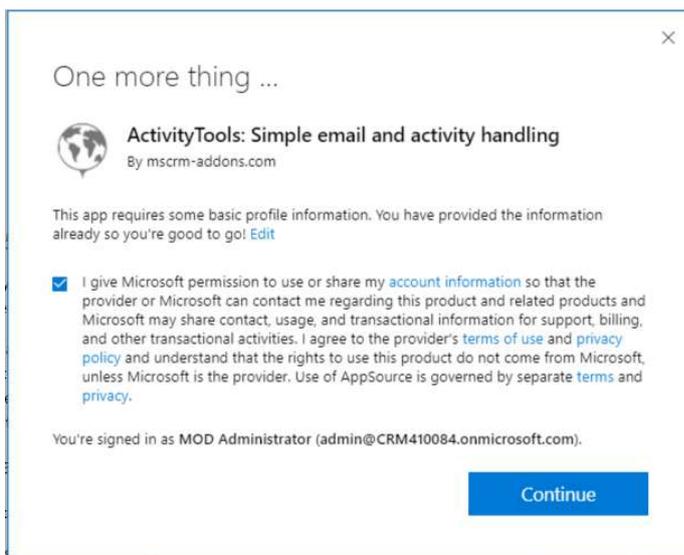
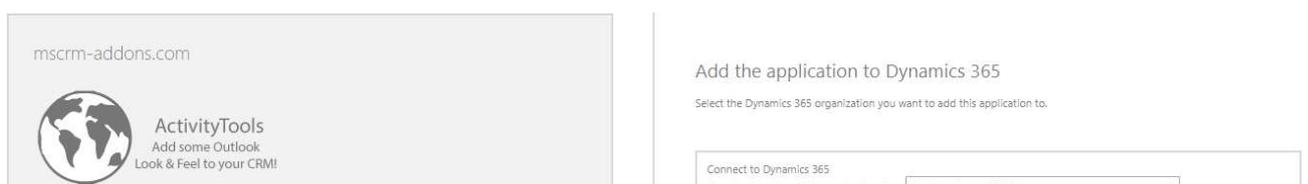
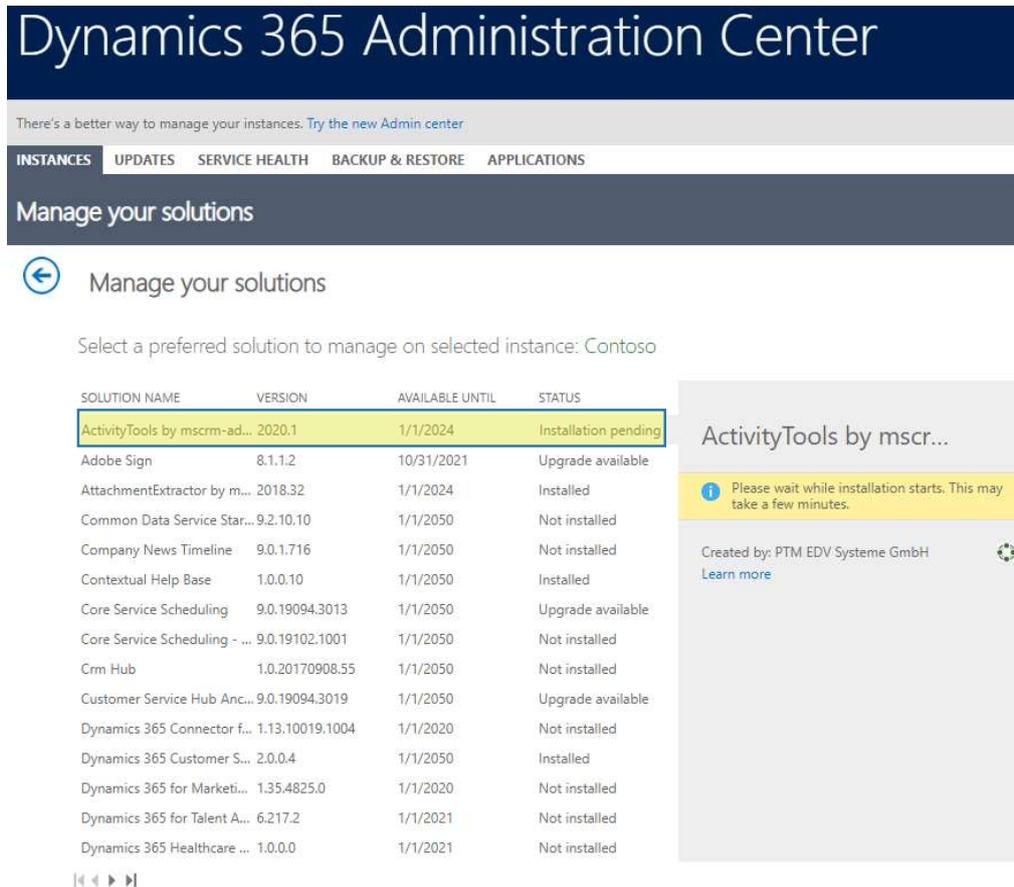


Figure 5: Check the Microsoft permission checkbox

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



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).



Dynamics 365 Administration Center

There's a better way to manage your instances. Try the new Admin center.

INSTANCES | UPDATES | SERVICE HEALTH | BACKUP & RESTORE | APPLICATIONS

Manage your solutions

← Manage your solutions

Select a preferred solution to manage on selected instance: Contoso

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
ActivityTools by mscrm-ad...	2020.1	1/1/2024	Installation pending
Adobe Sign	8.1.1.2	10/31/2021	Upgrade available
AttachmentExtractor by m...	2018.32	1/1/2024	Installed
Common Data Service Star...	9.2.10.10	1/1/2050	Not installed
Company News Timeline	9.0.1.716	1/1/2050	Not installed
Contextual Help Base	1.0.0.10	1/1/2050	Installed
Core Service Scheduling	9.0.19094.3013	1/1/2050	Upgrade available
Core Service Scheduling - ...	9.0.19102.1001	1/1/2050	Not installed
Crm Hub	1.0.20170908.55	1/1/2050	Not installed
Customer Service Hub Anc...	9.0.19094.3019	1/1/2050	Upgrade available
Dynamics 365 Connector f...	1.13.10019.1004	1/1/2020	Not installed
Dynamics 365 Customer S...	2.0.0.4	1/1/2050	Installed
Dynamics 365 for Marketi...	1.35.4825.0	1/1/2020	Not installed
Dynamics 365 for Talent A...	6.217.2	1/1/2021	Not installed
Dynamics 365 Healthcare ...	1.0.0.0	1/1/2021	Not installed

ActivityTools by mscrm...
Please wait while installation starts. This may take a few minutes.
Created by: PTM EDV Systeme GmbH
[Learn more](#)

Figure 7: Organization overview – AT installation pending

t AT and its usage.

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).



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Manage your solutions

← Manage your solutions

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).

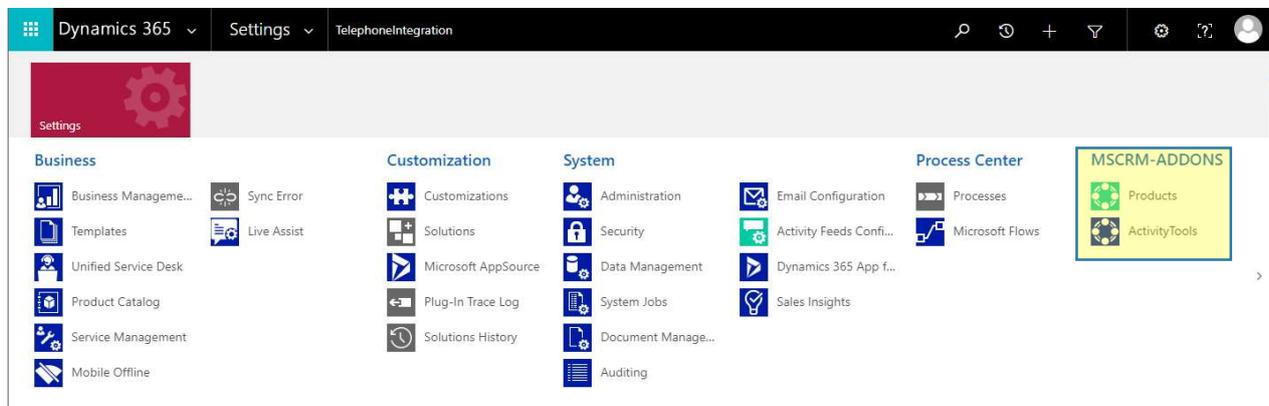
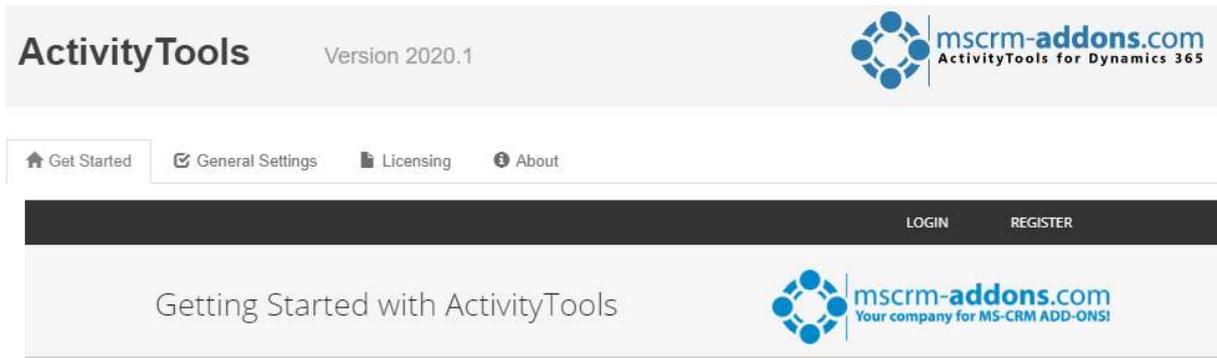


Figure 9: Dynamics 365 Settings > MSCRM-ADDONS: ActivityTools

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.



Welcome to ActivityTools for Microsoft Dynamics CRM!

The solution has been successfully deployed to your environment. To finalize the setup please perform the following actions:

- 1 Assign the following security roles to your users: **"Mandatory security roles"**
- 2 Embed ActivityTools into your Dynamics 365. Take a look into our [documentation](#) to embed ActivityTools into your social pane or look into our **"Step-by-Step video"**

That's it! If you have any questions don't hesitate to contact our support-group available via live-chat 17 hours a day!

Figure 10: ActivityTools Getting Started page

1 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.

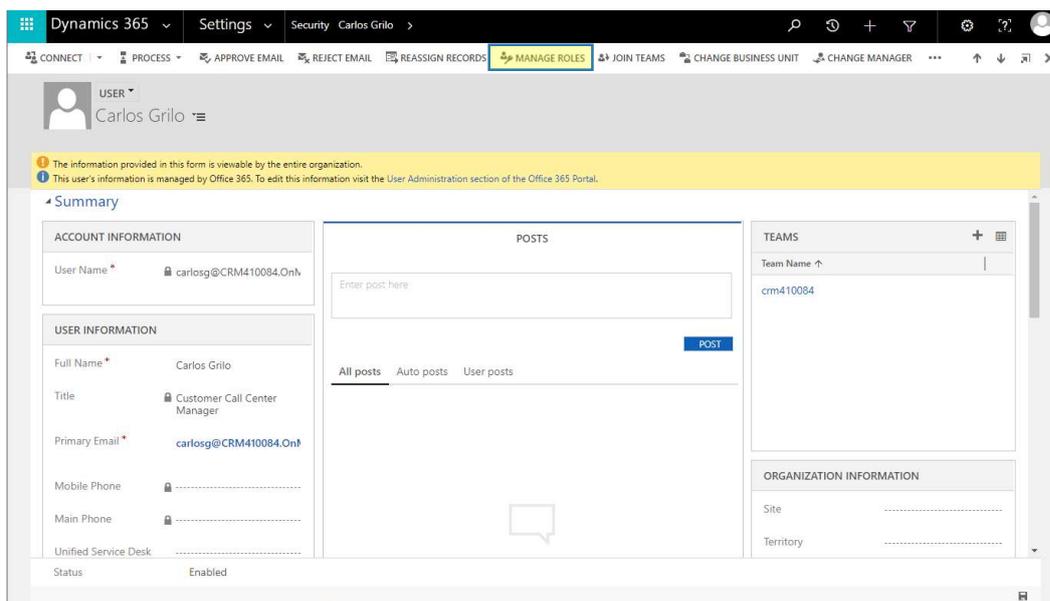


Figure 11: Manage roles

In the so opened window please enable the two security roles you can see in the figure below by checking the checkbox.

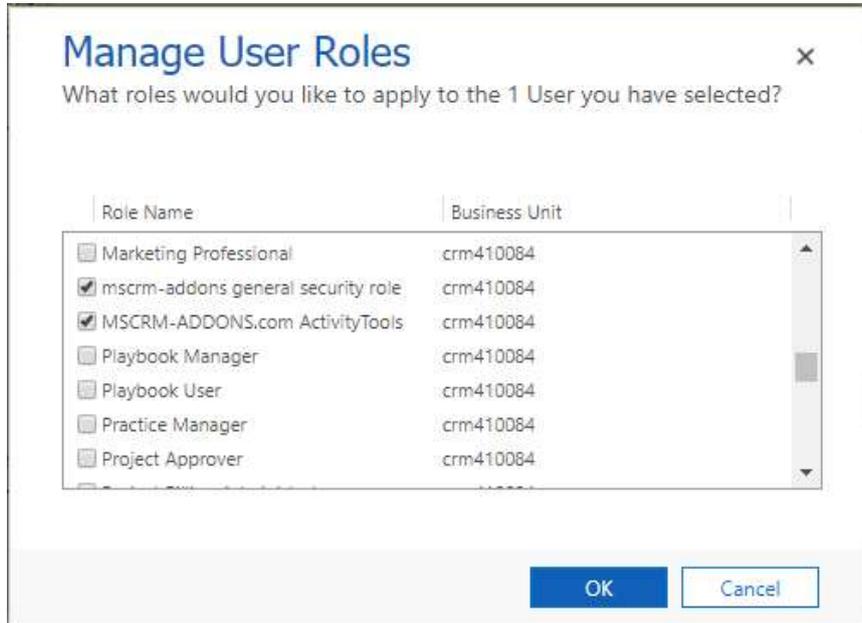


Figure 12: Manage user roles

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.

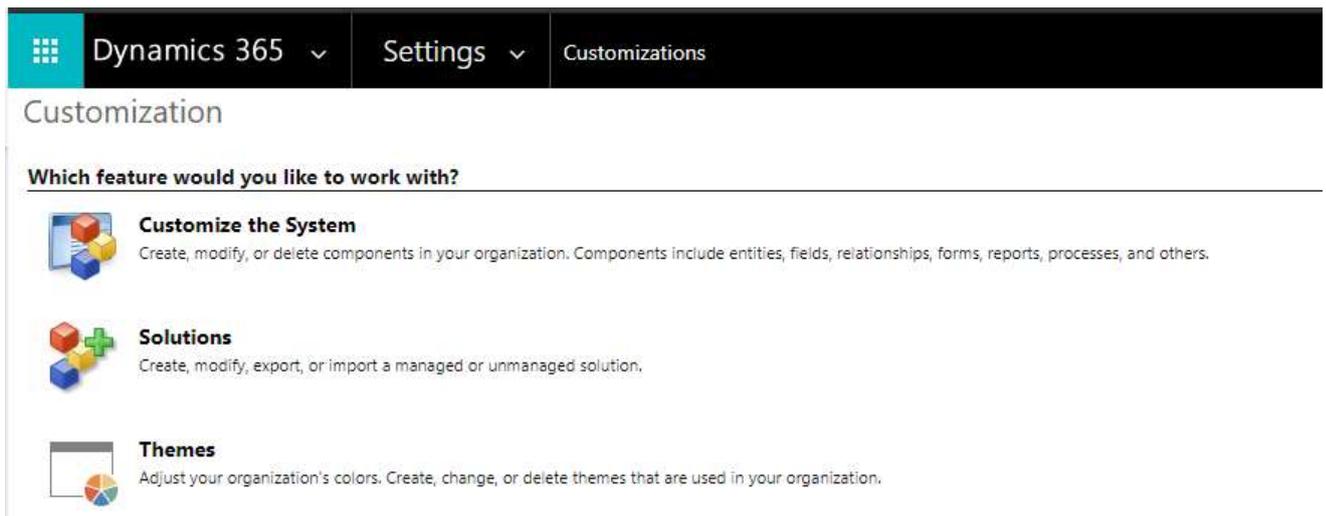


Figure 13: Settings - Customize the system

In the window below, please open the **Account** entity, go to **Forms** and select a form. In this case, we select the form **'Account'**.

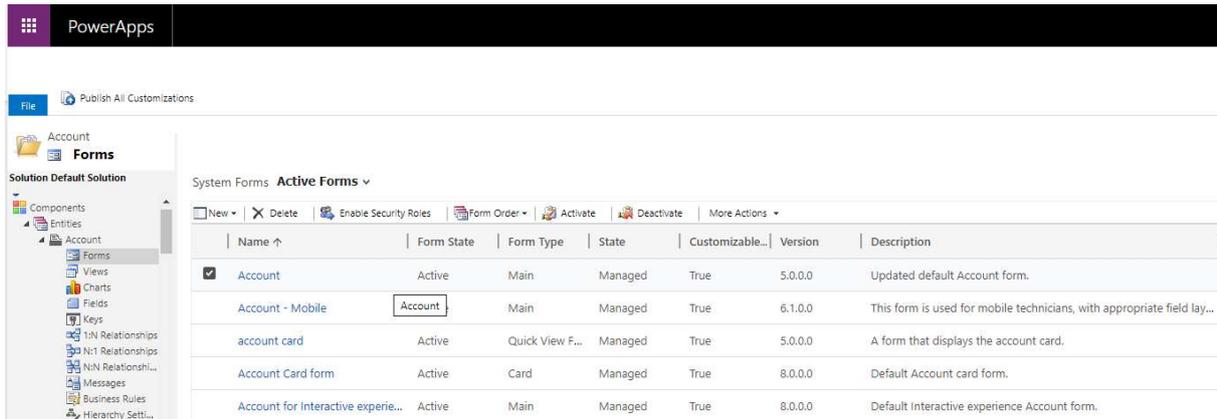


Figure 14: Select a form for the entity account

In this example, please navigate to the **1** *Insert*-tab, select **2** One Column and click on **3** Web Resource. Please fill in the **4** requested fields below.

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

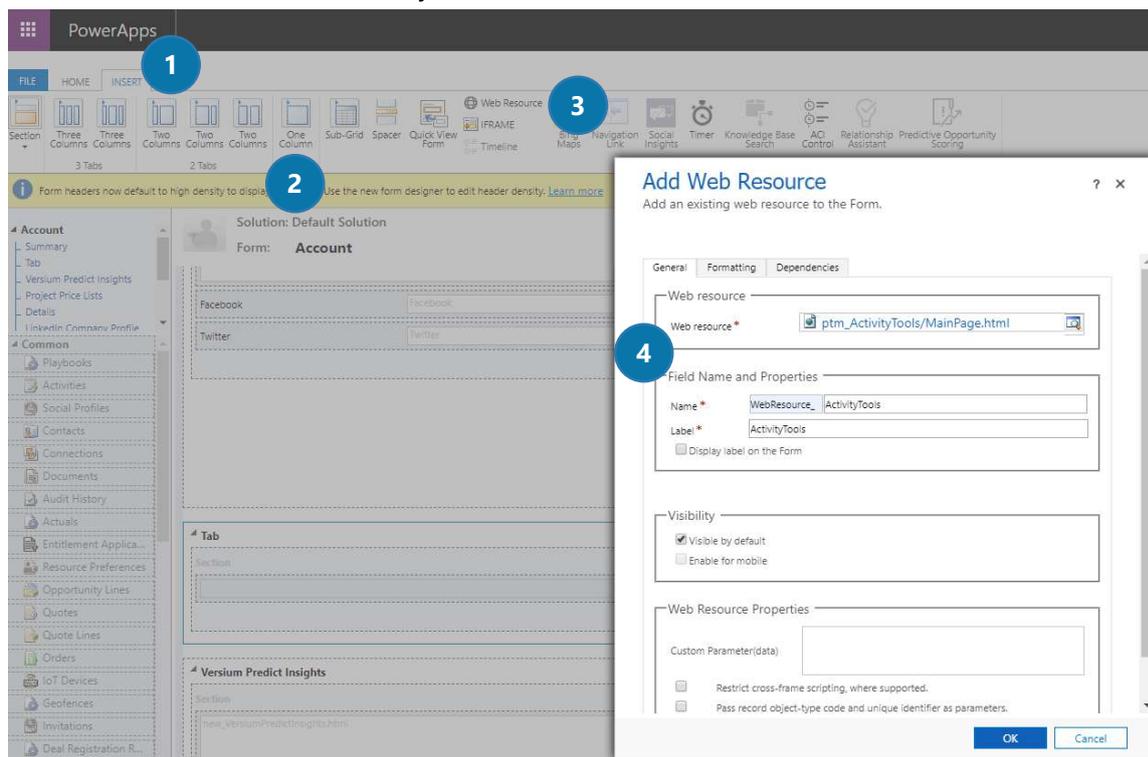
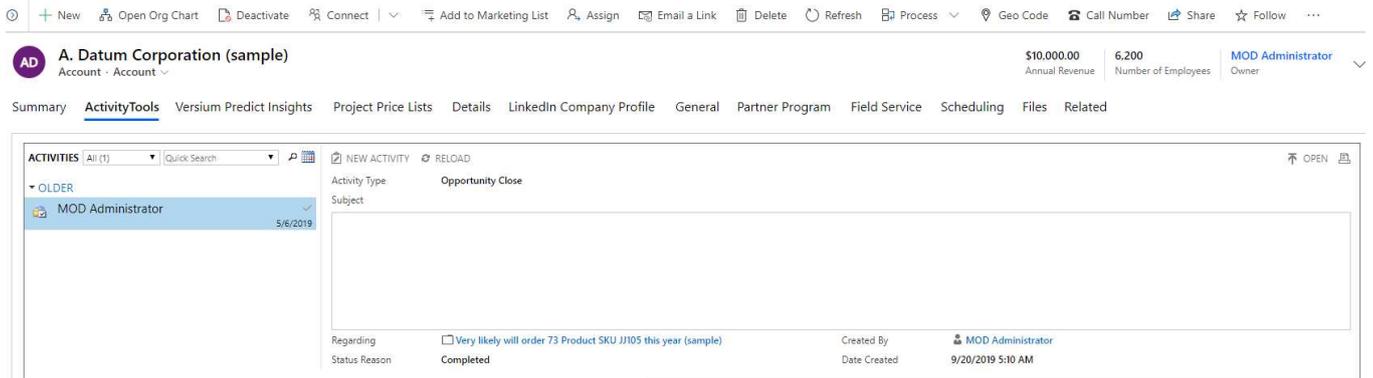


Figure 15: Define your form

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

Congratulations! 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.



The screenshot shows the ActivityTools interface for the account 'A. Datum Corporation (sample)'. At the top, there is a navigation bar with various actions like 'New', 'Open Org Chart', 'Deactivate', 'Connect', 'Add to Marketing List', 'Assign', 'Email a Link', 'Delete', 'Refresh', 'Process', 'Geo Code', 'Call Number', 'Share', 'Follow', and a menu icon. Below this, the account name 'A. Datum Corporation (sample)' is displayed along with key metrics: '\$10,000.00 Annual Revenue', '6,200 Number of Employees', and 'MOD Administrator Owner'. A secondary navigation bar includes 'Summary', 'ActivityTools' (selected), 'Versium Predict Insights', 'Project Price Lists', 'Details', 'LinkedIn Company Profile', 'General', 'Partner Program', 'Field Service', 'Scheduling', 'Files', and 'Related'. The main content area is titled 'ACTIVITIES' and shows a list of activities. One activity is visible: 'MOD Administrator' with a date of '5/6/2019'. The activity details are shown on the right, including 'Activity Type: Opportunity Close', 'Subject', 'Regarding: Very likely will order 73 Product SKU JJ105 this year (sample)', 'Status Reason: Completed', 'Created By: MOD Administrator', and 'Date Created: 9/20/2019 5:10 AM'. There are also buttons for 'NEW ACTIVITY', 'RELOAD', and 'OPEN'.

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> or contact support@mscrm-addons.com.

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