



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.

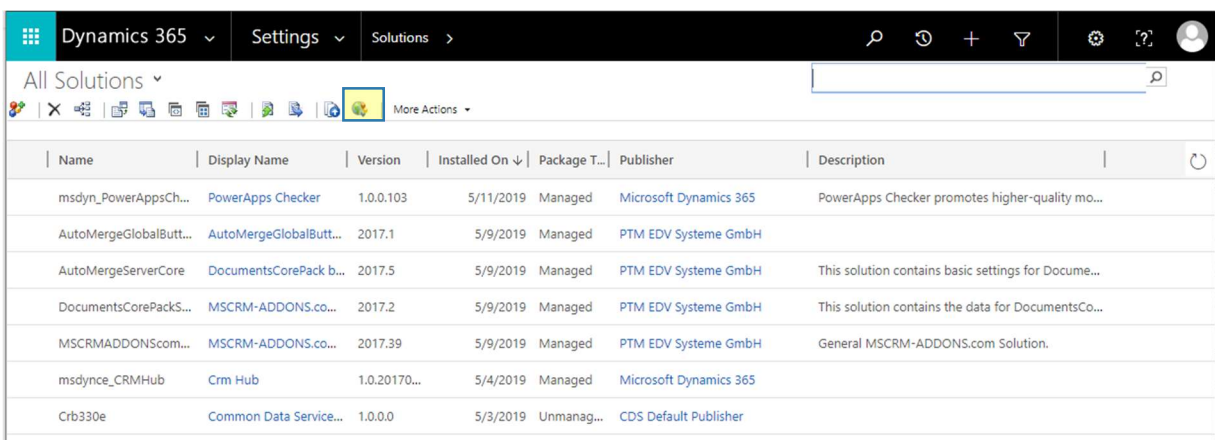
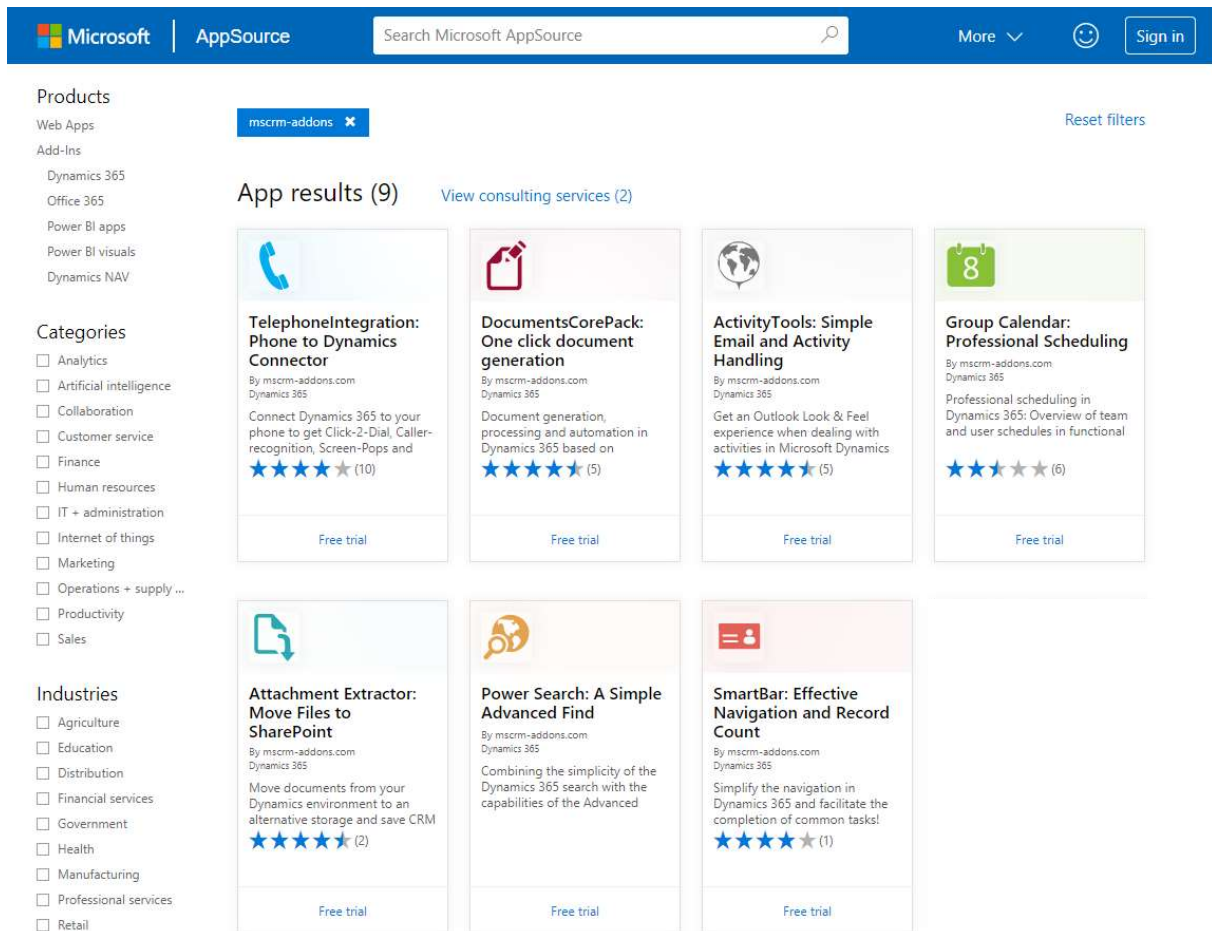


Figure 1: Get solutions from Marketplace

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).

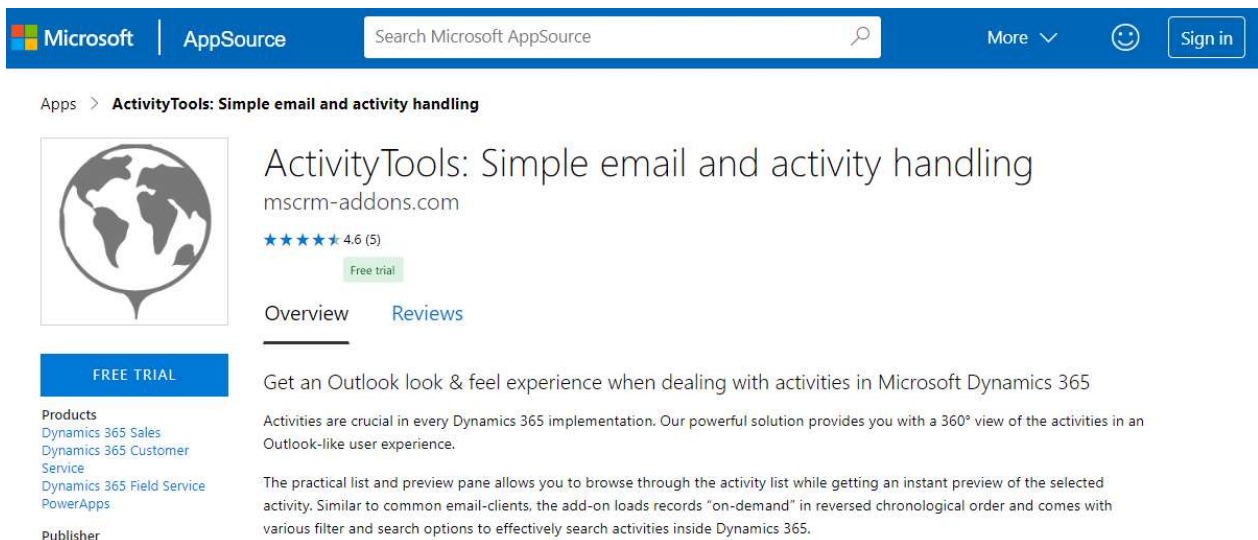


The screenshot shows the Microsoft AppSource interface with the search results for 'mscrm-addons'. The results are displayed in a grid of seven app cards. Each card includes an icon, the app name, a brief description, a star rating, and a 'Free trial' button.

App Name	Description	Rating	Trial
TelephoneIntegration: Phone to Dynamics Connector	Connect Dynamics 365 to your phone to get Click-2-Dial, Caller-recognition, Screen-Pops and	★★★★★ (10)	Free trial
DocumentsCorePack: One click document generation	Document generation, processing and automation in Dynamics 365 based on	★★★★★ (5)	Free trial
ActivityTools: Simple Email and Activity Handling	Get an Outlook Look & Feel experience when dealing with activities in Microsoft Dynamics	★★★★★ (5)	Free trial
Group Calendar: Professional Scheduling	Professional scheduling in Dynamics 365: Overview of team and user schedules in functional	★★★★★ (6)	Free trial
Attachment Extractor: Move Files to SharePoint	Move documents from your Dynamics environment to an alternative storage and save CRM	★★★★★ (2)	Free trial
Power Search: A Simple Advanced Find	Combining the simplicity of the Dynamics 365 search with the capabilities of the Advanced		Free trial
SmartBar: Effective Navigation and Record Count	Simplify the navigation in Dynamics 365 and facilitate the completion of common tasks!	★★★★★ (1)	Free trial

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

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



The screenshot shows the detailed page for the 'ActivityTools: Simple email and activity handling' app. The page includes the app icon, name, publisher (mscrm-addons.com), a star rating of 4.6 (5), and a 'Free trial' button. Below the app details, there is a 'FREE TRIAL' button and a 'Products' section listing related apps: Dynamics 365 Sales, Dynamics 365 Customer Service, Dynamics 365 Field Service, and PowerApps. The 'Publisher' section is also visible.

ActivityTools: Simple email and activity handling
 mscrm-addons.com
 ★★★★★ 4.6 (5)
 Free trial

FREE TRIAL

Products
 Dynamics 365 Sales
 Dynamics 365 Customer Service
 Dynamics 365 Field Service
 PowerApps

Publisher

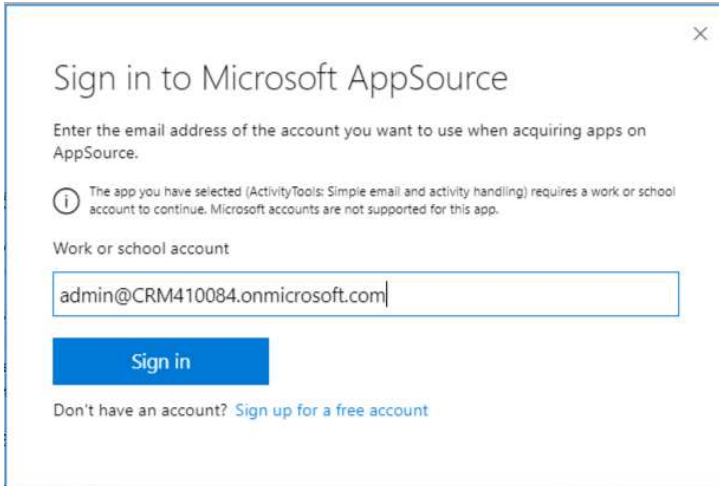
Get an Outlook look & feel experience when dealing with activities in Microsoft Dynamics 365

Activities are crucial in every Dynamics 365 implementation. Our powerful solution provides you with a 360° view of the activities in an Outlook-like user experience.

The practical list and preview pane allows you to browse through the activity list while getting an instant preview of the selected activity. Similar to common email-clients, the add-on loads records "on-demand" in reversed chronological order and comes with various filter and search options to effectively search activities inside Dynamics 365.


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.



Sign in to Microsoft AppSource

Enter the email address of the account you want to use when acquiring apps on AppSource.

 The app you have selected (ActivityTools: Simple email and activity handling) requires a work or school account to continue. Microsoft accounts are not supported for this app.

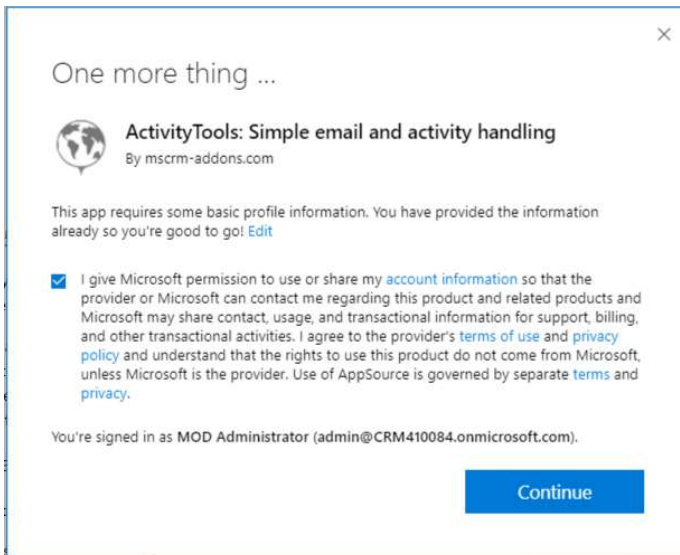
Work or school account

Sign in


Don't have an account? [Sign up for a free account](#)

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.



One more thing ...

 **ActivityTools: Simple email and activity handling**
By mscrm-addons.com

This app requires some basic profile information. You have provided the information already so you're good to go! [Edit](#)

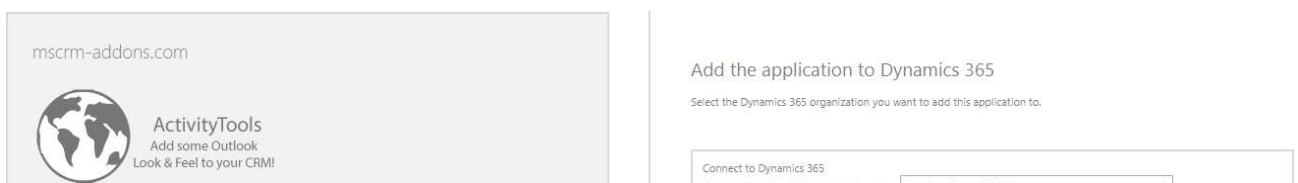
☒ I give Microsoft permission to use or share my [account information](#) so that the provider or Microsoft can contact me regarding this product and related products and Microsoft may share contact, usage, and transactional information for support, billing, and other transactional activities. I agree to the provider's [terms of use](#) and [privacy policy](#) and understand that the rights to use this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource is governed by separate [terms](#) and [privacy](#).

You're signed in as MOD Administrator (admin@CRM410084.onmicrosoft.com).


Continue

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.



mscrm-addons.com

 **ActivityTools**
Add some Outlook
Look & Feel to your CRM!

Add the application to Dynamics 365

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

Connect to Dynamics 365

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).

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

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).

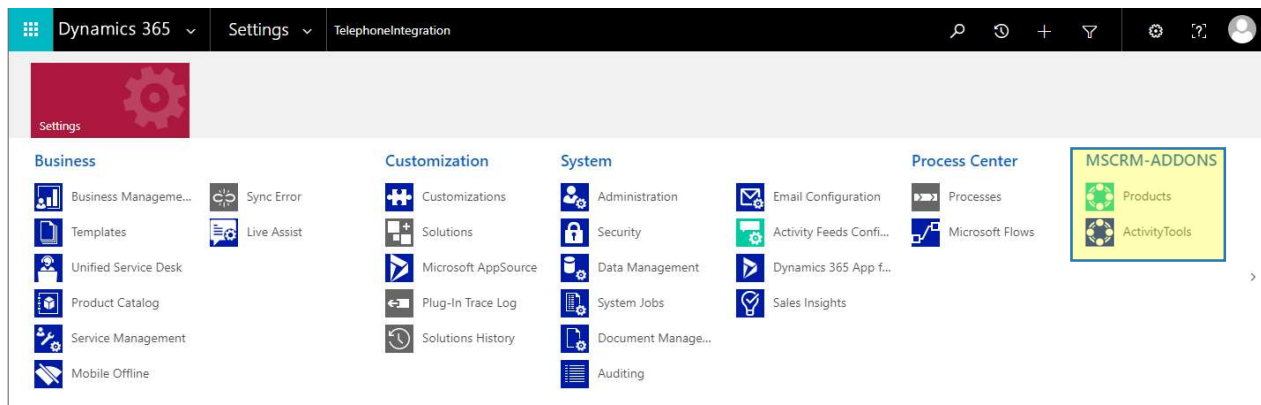


Figure 9: Dynamics 365 Settings > MSCRM-ADDONS: ActivityTools

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.

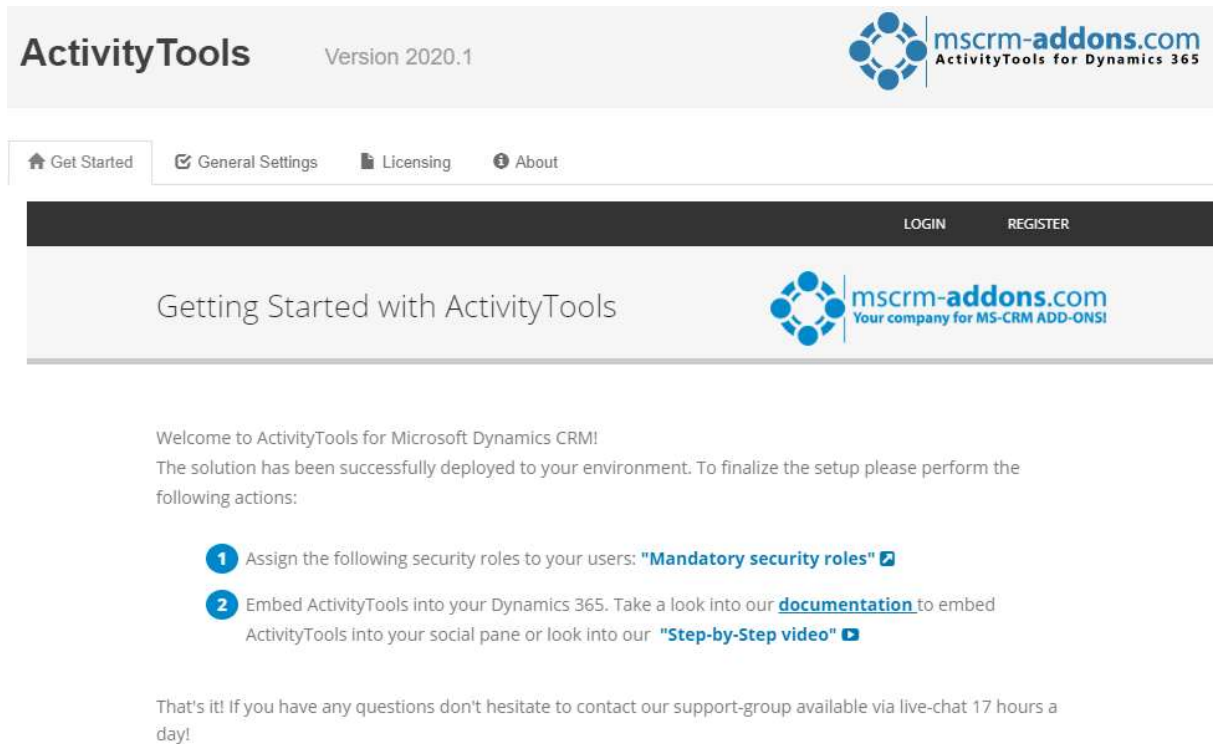


Figure 10: ActivityTools Getting Started page

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.

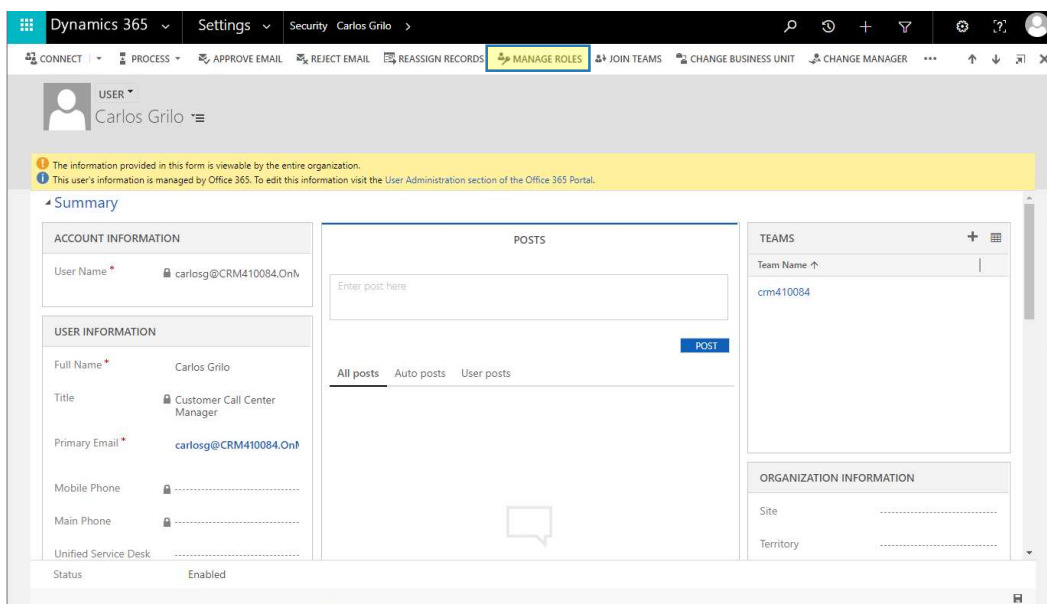


Figure 11: Manage roles

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

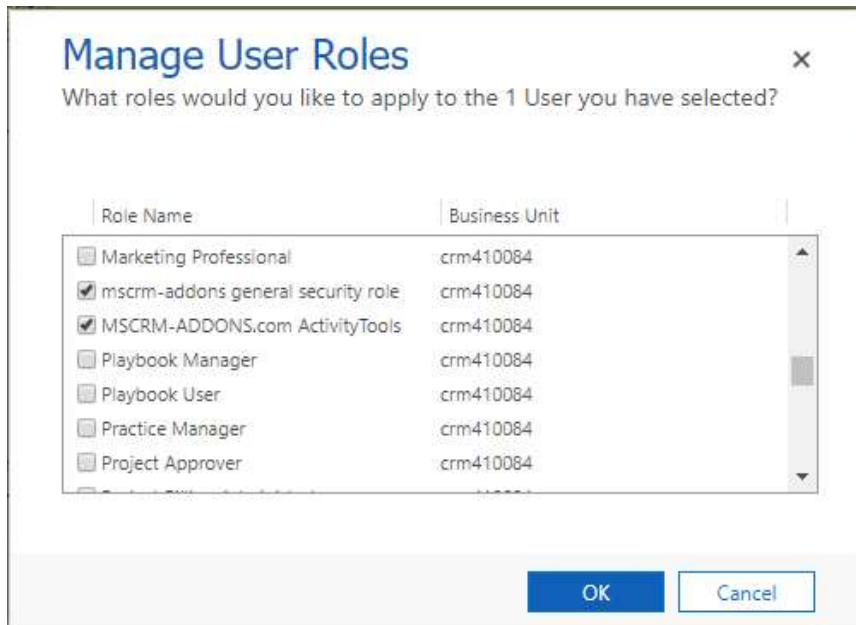


Figure 12: Manage user roles

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.

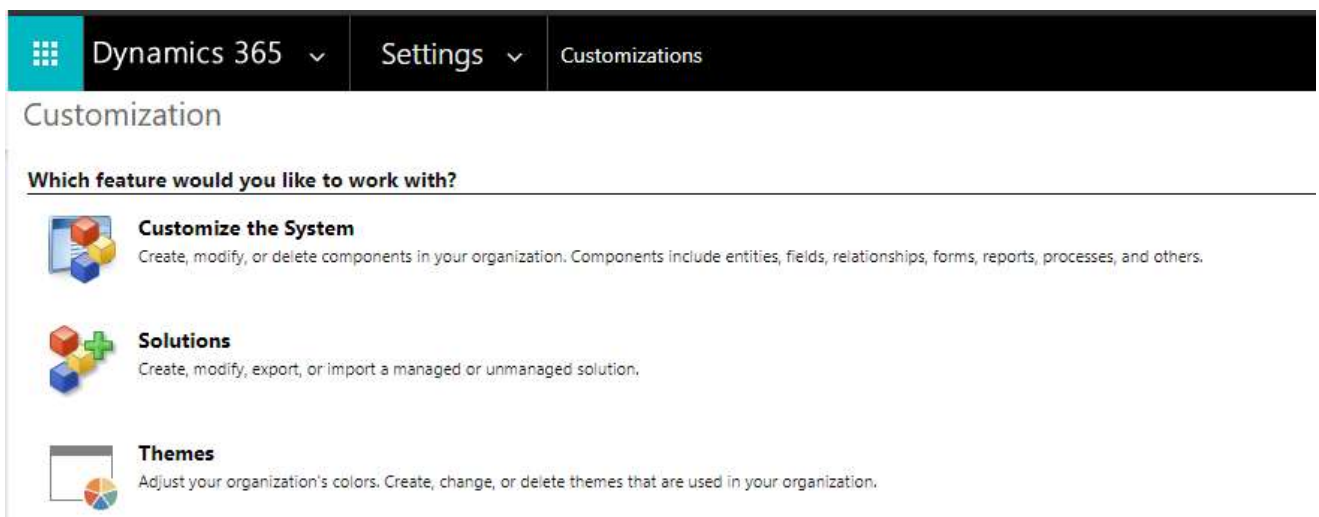


Figure 13: Settings - Customize the system

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

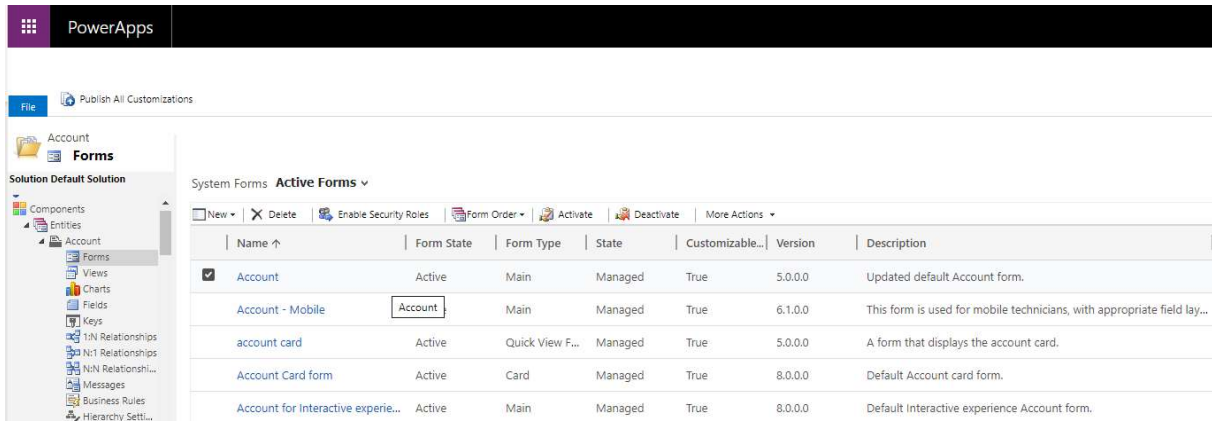


Figure 14: Select a form for the entity account

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.

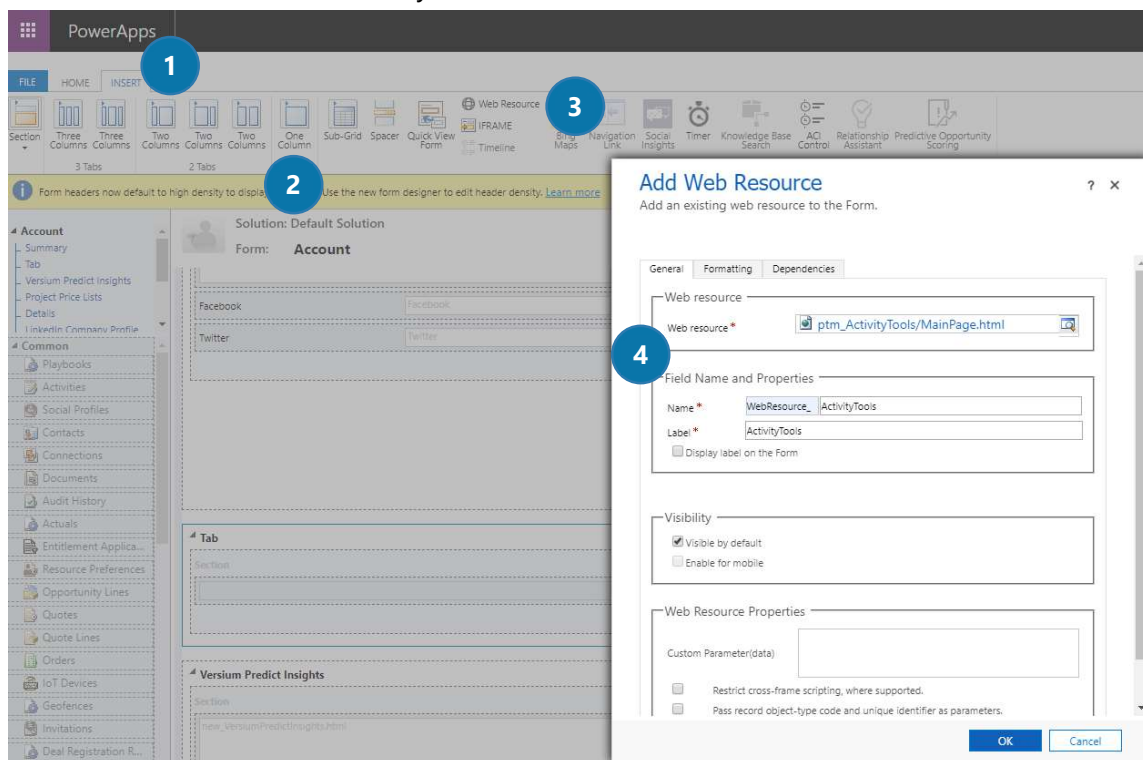
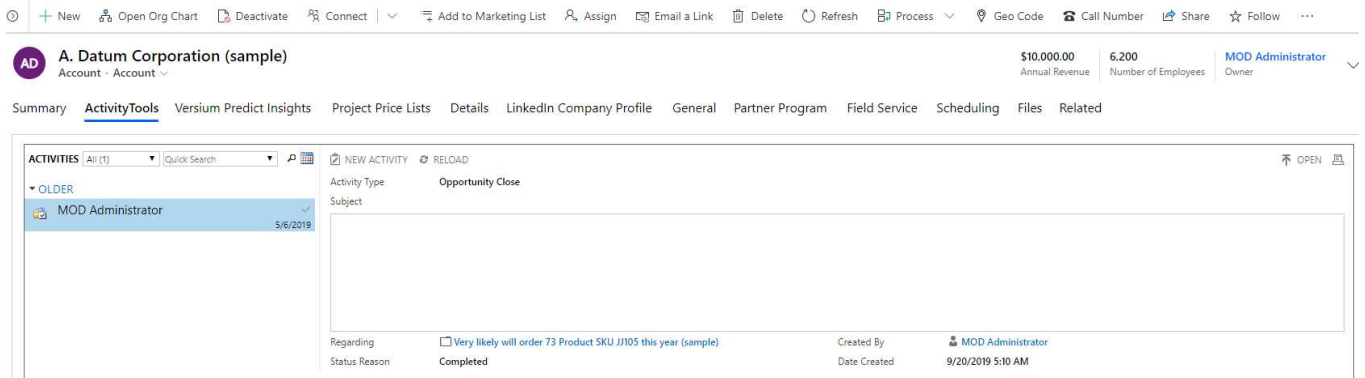


Figure 15: Define your form

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

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.



The screenshot shows the ActivityTools interface for the account "A. Datum Corporation (sample)". The top navigation bar includes options 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. The account details section shows "A. Datum Corporation (sample)" with a dropdown for "Account", and key metrics: "\$10,000.00 Annual Revenue", "6,200 Number of Employees", and "MOD Administrator Owner". The "ActivityTools" tab is selected, showing a list of activities. The first activity is "MOD Administrator" with a date of "5/6/2019". The activity details pane on the right shows "Activity Type: Opportunity Close", "Subject:", and "Regarding: Very likely will order 73 Product SKU JJ105 this year (sample)". The status is "Completed" and it was "Created By: MOD Administrator" on "9/20/2019 5:10 AM".

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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