



ActivityTools

for Microsoft CRM 2015/2016 and Dynamics 365

v.2.4, June 2017

ActivityTools

(How to work with ActivityTools for Microsoft CRM 2015/2016 and Dynamics 365)

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Content

1	How to install ActivityTools for Microsoft Dynamics CRM 2015/2016 and Dynamics 365.....	6
2	How to install ActivityTools via .exe installer	7
2.1	EULA (End User License Agreement)	8
2.1	Installation.....	8
2.2	Logon Information.....	9
2.3	Security Roles	11
2.4	Complete the installation	12
3	How to install ActivityTools via solution import	13
3.1	Additional information for Dynamics 365 versions only:	18
3.2	Launch ActivityTools.....	19
4	ActivityTools Organization Overview	20
4.1	ActivityTools Organization Overview when installing ActivityTools via .exe installer	21
4.1.1	How to reinstall/upgrade.....	22
4.1.2	How to use the LicenseManager.....	22
5	Configuration Page	24
5.1	The Getting Started -Tab.....	25
5.2	The General Settings -Tab.....	26
5.3	The Licensing -Tab.....	31
5.4	The About -Tab.....	32
5.5	Additional settings.....	33
5.5.1	Custom buttons	34
5.5.2	Grid Custom Columns.....	36
5.5.3	ATPluginFilter	37
5.5.4	Format Grid Items	39
6	How to embed ActivityTools in MS Dynamics CRM.....	41
6.1	Embed ActivityTools via form script into CRM Social Pane.....	42
6.2	Embed ActivityTools via Web Resource.....	47
6.3	Embed ActivityTools into Form Menu – Entity Related Preview	50
6.4	Embed ActivityTools in Dashboards – User related preview (MyActivities)	55
6.4.1	How to embed ActivityTools in Dashboards	56
6.5	Embed MyActivities in CRM NavigationBar (SiteMap) – User related preview (My Activities).....	59
6.5.1	How to embed ActivityTools in the CRM NavigationBar (SiteMap)	60

ActivityTools for Microsoft Dynamics CRM 2015/2016 and Dynamics 365

7	How to use Activity Tools Layout Designer.....	66
6.1.	How to start the Activity Tools Layout Designer.....	66
7.1	The ActivityTools Layout Designer	68
7.2	How to add new Layouts	72
7.2.1	Open the Entity Layouts dialog	72
8	How to activate debugging for ActivityTools	73
9	How to uninstall ActivityTools	78
10	Tutorials ("How To's")	79
10.1	How to edit/delete existing layouts	79
10.2	How to customize fields.....	80
10.2.1	How to add fields	80
10.2.2	How to remove fields.....	81
10.3	How to change the field language.....	82
10.4	How to export a Layout.....	84
10.5	How to import a Layout	85
11	List of figures.....	86
12	Contact	90

Preamble

This documentation is intended to guide you through the installation and proper usage of ActivityTools for Microsoft Dynamics CRM.

This guide applies to version 2015.207 or higher.

Please read this document carefully and follow the steps as described to achieve the described results.

Target Audience

This guide is intended for system administrators who are familiar with the following administrative tasks:

- Maintaining and configuring SQL Server databases
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft CRM Server

Supported Web Browsers and versions

Supported Web Browsers and Versions:

- Internet Explorer 9 and higher
- Firefox
- Chrome
- Edge

One of the following editions of Microsoft Dynamics CRM must be available:

- Microsoft Dynamics CRM Server 2015/2016 or Dynamics 365
- Microsoft Dynamics CRM Online



If you use ActivityTools 2015.200 or a higher version, you can upgrade from Microsoft Dynamics CRM 2015 to 2016 without extra work.

If you use an older version, please find a short step-by-step instruction about the upgrade of our addons to the latest version of Microsoft Dynamics CRM 2016 [here](#).

(Also, valid for Dynamics 365)

Any one of the following operating systems is required:

- Windows 10
- Windows 8.1 (64-bit and 32-bit versions)
- Windows 8 (64-bit and 32-bit versions)
- Windows 7 (64-bit and 32-bit versions)
- Windows Vista SP2 (6-bit and 32-bit versions)
- Windows Server 2012, Windows Server 2008 R2, or Windows Server 2008 when running as a Remote Desktop Services application.

Purpose of ActivityTools?

ActivityTools facilitates – among other things – the handling of activities and provides you with some Outlook Look & Feel in Dynamics 365.

With its email features, ActivityTools guarantees super user-friendly with Microsoft Dynamics 365! Defining signatures for a single Dynamics 365 user or a default email signature for all users is done in no time! ActivityTools supports HTML to define signatures in order to use links, pictures and front types/colors!

Besides its email features, ActivityTools is delivered with search and filter options, direct access to attachments, load on demand (which guarantees high performance) and a form designer, that allows users to fully customize the layout of ActivityTools.

1 How to install ActivityTools for Microsoft Dynamics CRM 2015/2016 and Dynamics 365

ActivityTools is very easy to install and to integrate into Microsoft Dynamics 365. The program can be installed and integrated in two different ways:

via .exe installer

(for details please have a look at [CHAPTER HOW TO INSTALL ACTIVITYTOOLS VIA .EXE INSTALLER ON PAGE 7](#))

via solution import

(for details have a look at [CHAPTER HOW TO INSTALL ACTIVITYTOOLS VIA SOLUTION IMPORT ON PAGE 13](#))

Before installing our product, you will have to download and unzip the ActivityTools folder. The following screenshot shows the downloaded and unzipped product. No matter which way of installing the program you choose, this window is the starting point:

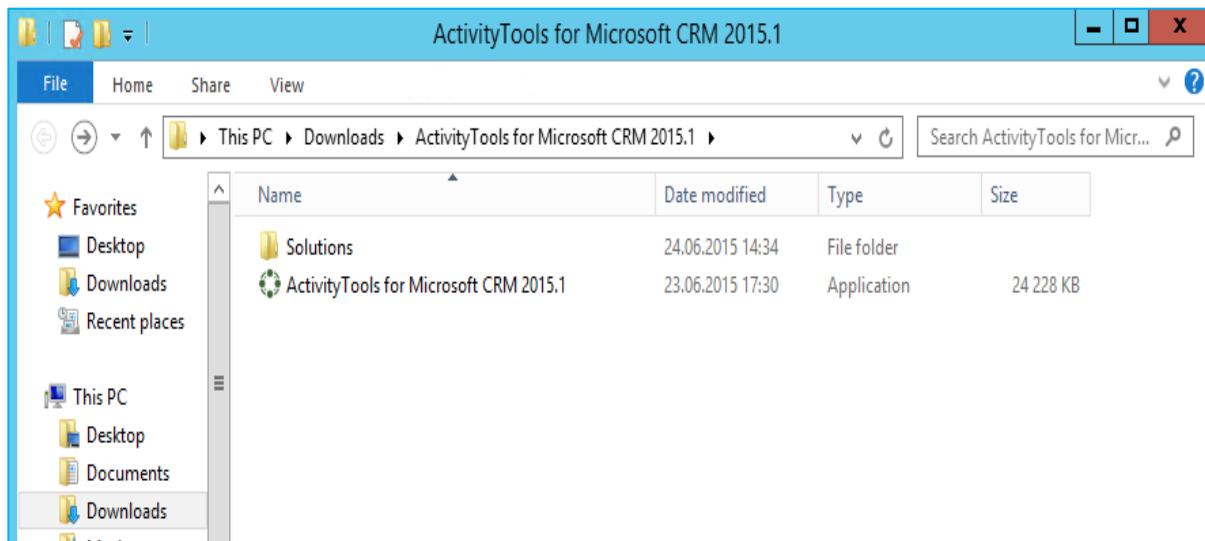


Figure 1: ActivityTools – Download .zip-file

2 How to install ActivityTools via .exe installer

If you have decided to install ActivityTools via .exe installer, you should start the installation with a double click on the ActivityTools.exe.

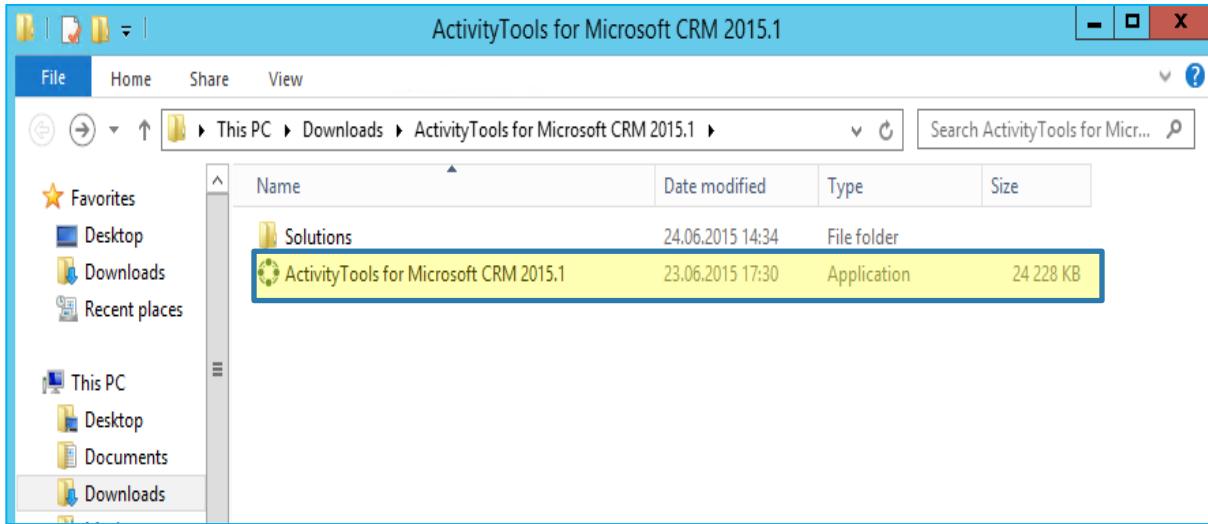


Figure 2: AcitivityTools .exe installer

Click on the **[Next]**-button in order to the installation.

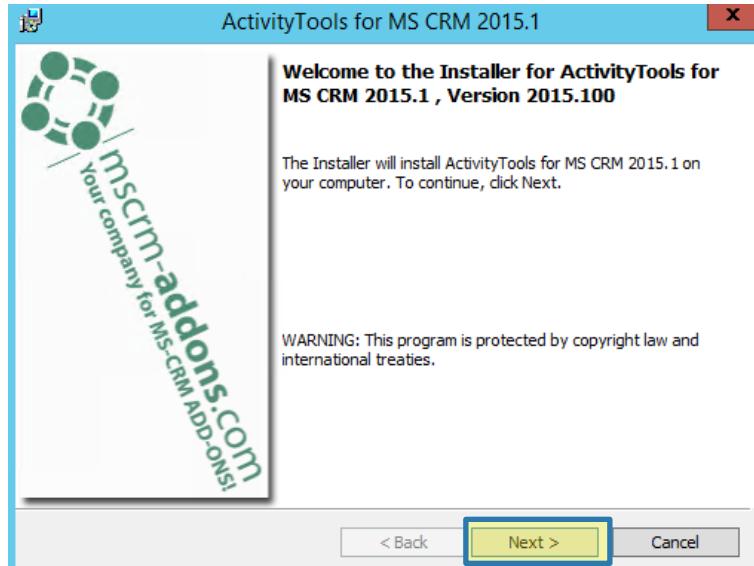


Figure 3: Installation dialog

2.1 EULA (End User License Agreement)

Read the license agreement carefully and accept its terms if you agree to them. In case you do not accept the license agreement, you cannot continue with the installation. You may also print the agreement if you want to.

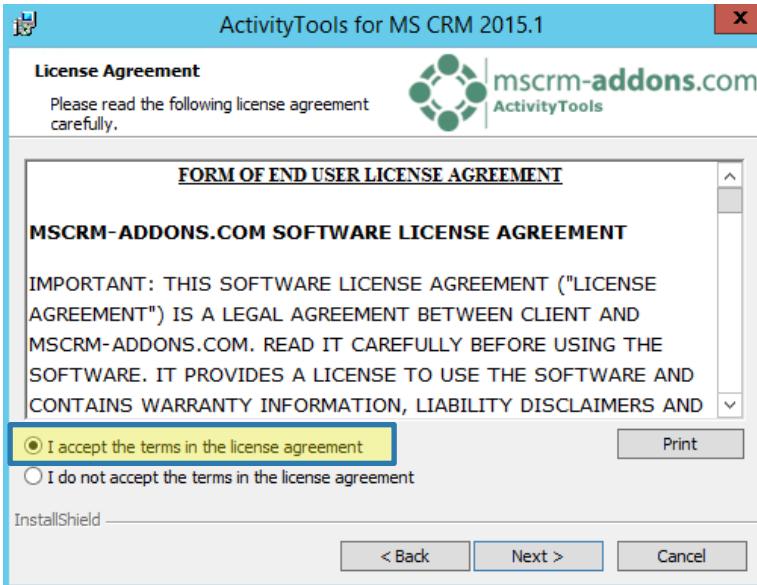


Figure 4: EULA – End User License Agreement

2.1 Installation

After accepting the EULA click on the **[Next]**-button to continue with the installation. In case you want to change the settings, simply click on the **[Change]**-button.

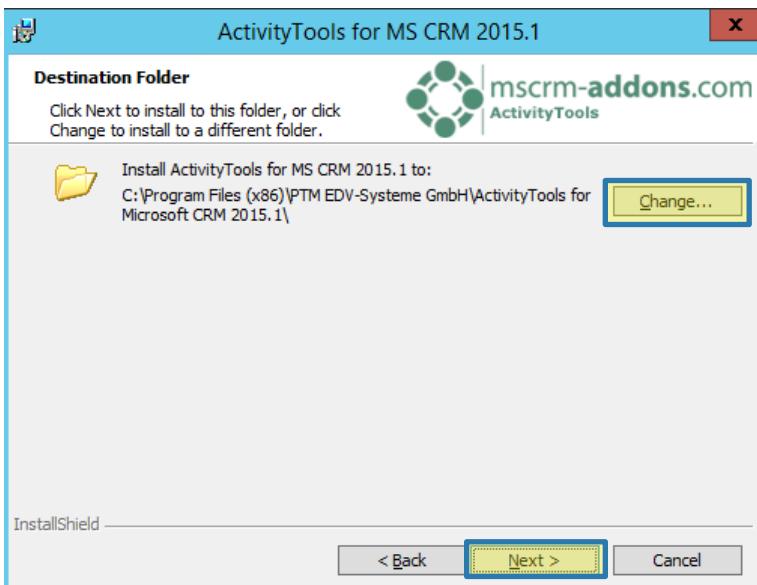


Figure 5: Installation – Destination folder

Click on the **[Install]**-button to start the installation:

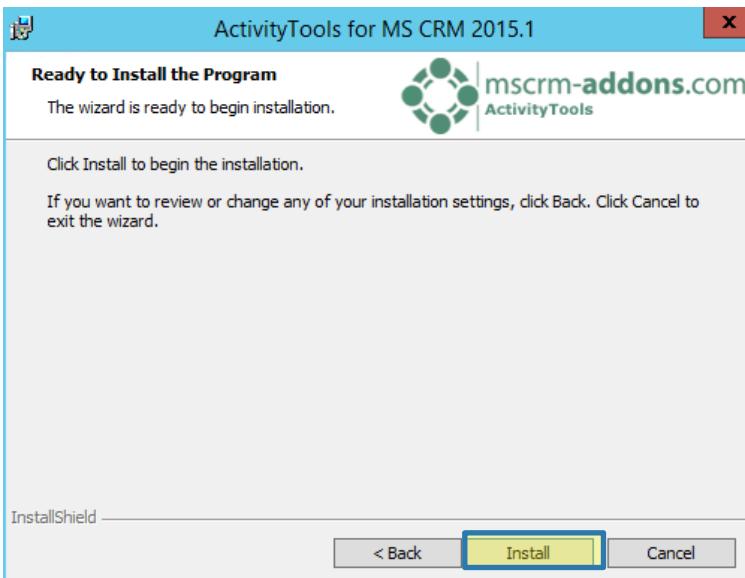


Figure 6: ActivityTools installation finished

2.2 Logon Information

ActivityTools requires a connection to Dynamics 365. To configure your Dynamics 365 Server, select an existing profile or create a new profile. Choose your preferred server path and add your login credentials by filling in the field's username, password and domain. Press the **[Retrieve all Organizations]**-button and select your organization.

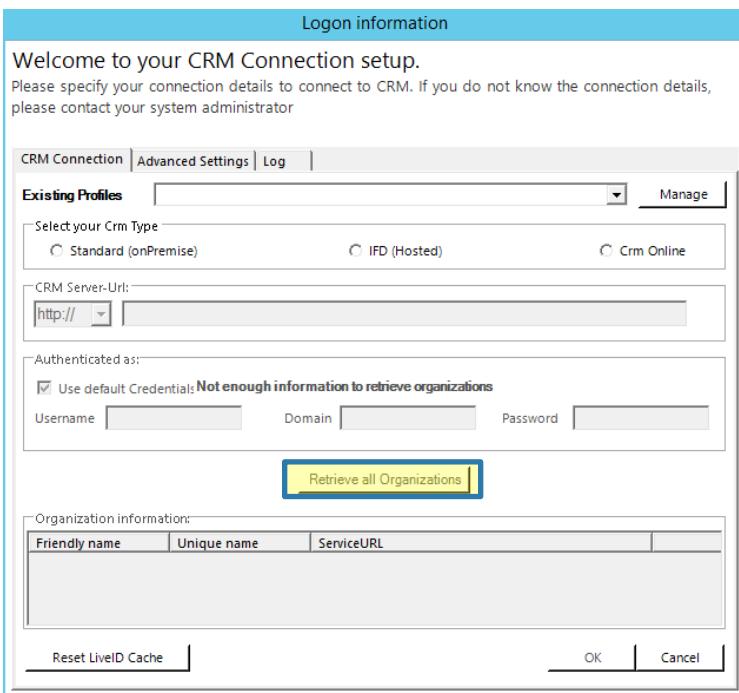


Figure 7: CRM Connection setup – Retrieve all Organizations

Now press the **[OK]-button**. For further information on the CRM Connection dialog, please have a look at our [Connection Dialog documentation](#) in the download area of our website.

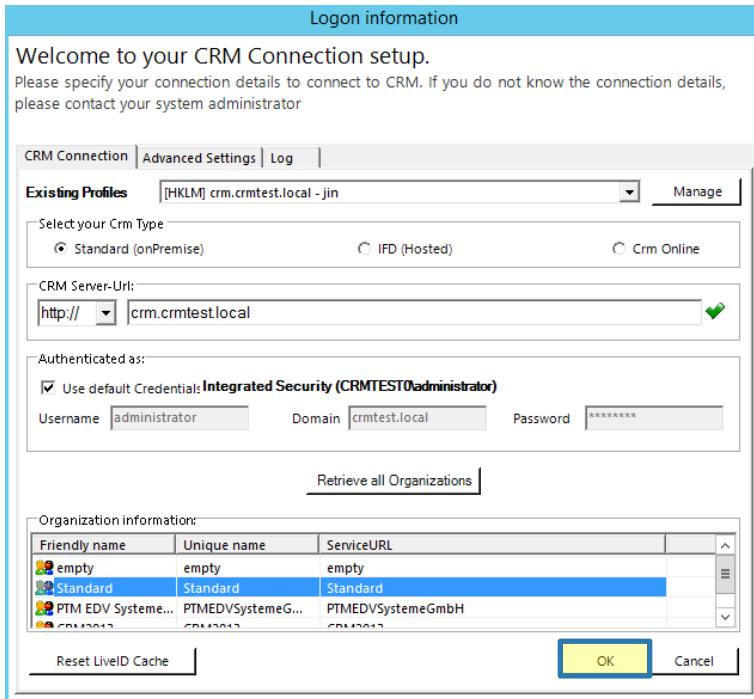


Figure 8: CRM Connection setup – select organization

Anyway, when you proceed, the following window appears on the screen:

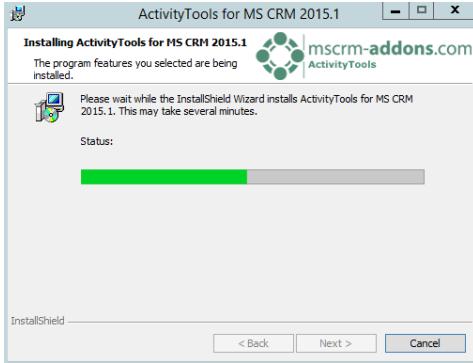


Figure 9: InstallShield Wizard

During the installation process, you will be asked if you want to install demo forms for the entities account and contact. If you want to have a quick look at the functionalities without further configuration needs, feel free to install the demo forms. To do so, click on the **[Yes]**-button. To skip this step, click on the **[No]**-button.

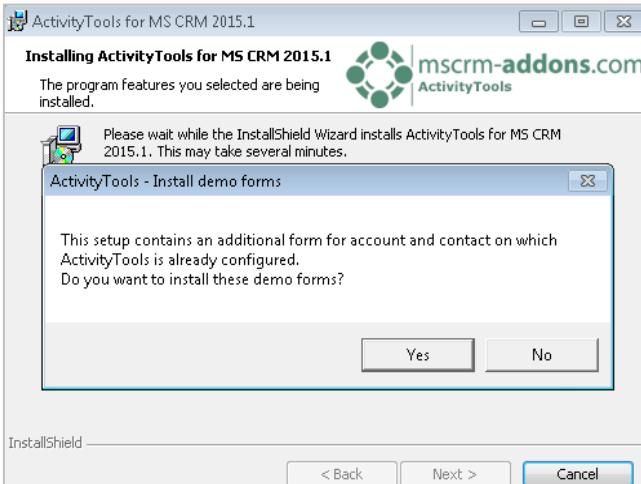


Figure 10: Demo forms dialog

For detailed information on Demo Forms, please take a look at chapter [3 HOW TO INSTALL ACTIVITYTOOLS VIA SOLUTION IMPORT ON PAGE 13](#).

2.3 Security Roles

GENERAL SECURITY ROLES FOR ALL PRODUCTS

The following security role contains the basic requirements for using our products and for being able to perform the license check:

- [MSCRM-ADDONS GENERAL SECURITY ROLE](#)

During the installation you will also be asked if you want to install the security roles for all users:

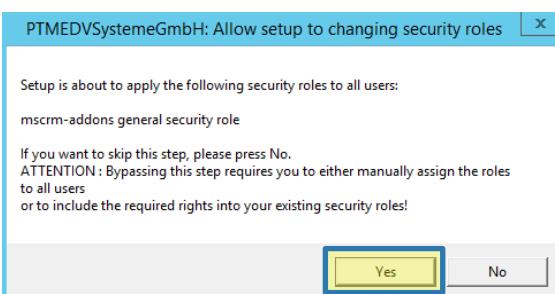


Figure 11: Install security roles for all users?

Click on the **[Yes]**-button in order to continue. In case you click on the **[No]**-button, you will have to assign the roles manually to all users.

2.4 Complete the installation

If the installation was successful, the following window appears. Click on the **[Finish]**-button to complete the installation and to exit the installer.

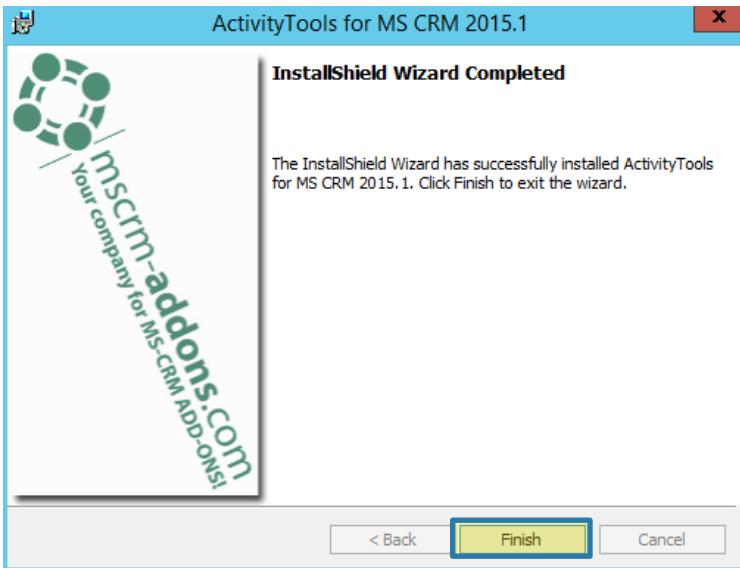


Figure 12: Complete the installation process

3 How to install ActivityTools via solution import

To install ActivityTools via solution import, open CRM and navigate to *Settings* and select *Solutions* there.

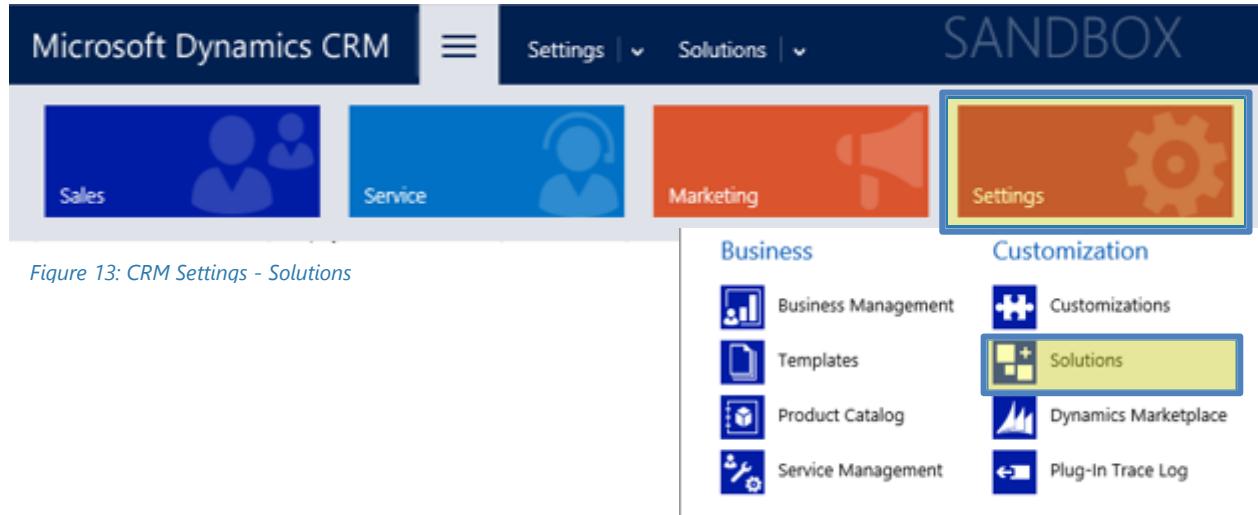


Figure 13: CRM Settings - Solutions

Click on the **[Import solutions]** – button in order to import ActivityTools.

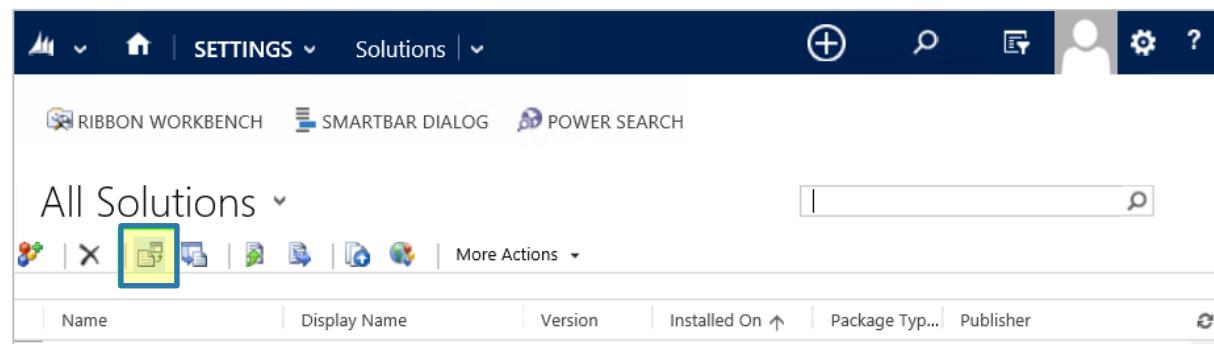


Figure 14: Import Solutions

The *Select Solution Package*-window opens:

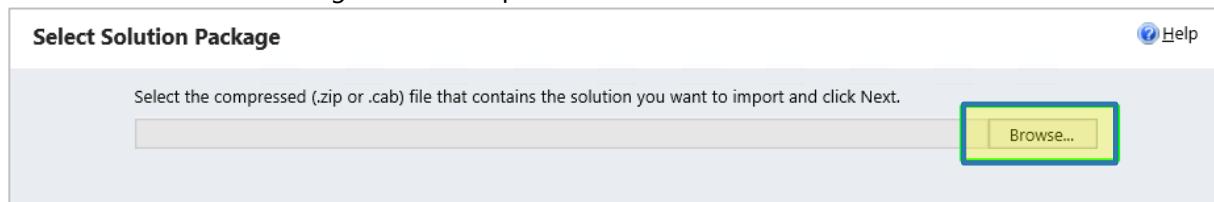


Figure 15: Select Solution Package window

Now click on the **[Browse]**-button and upload the following files:

① MSCRMADDONScomGENERAL

② ACTIVITYTOOLSPLUGINCORE



It is of upmost importance to upload the two mandatory files in the above order!

If you have not modified the file location in the beginning, you should find the files here:

Downloads\ActivityTools for Microsoft CRM 2015.1\Solutions

After a simple double-click on the first file ("MSCRMADDONScomGeneral")

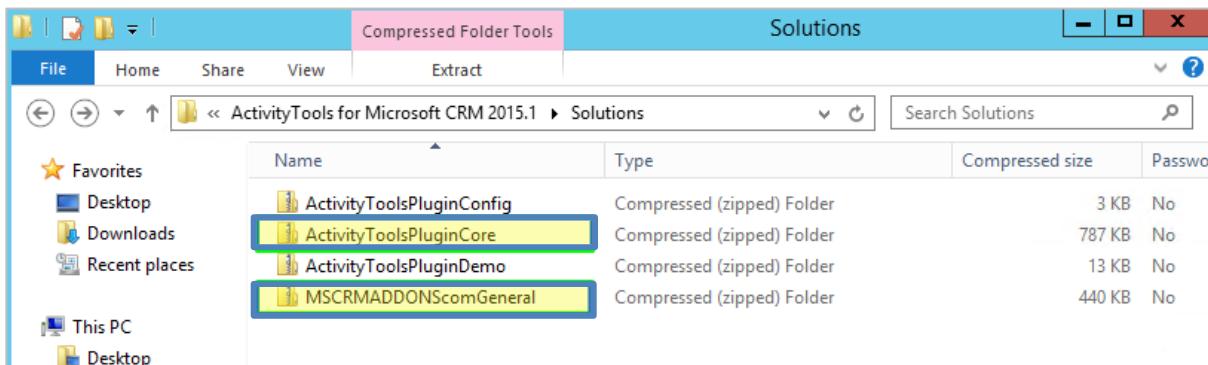


Figure 16: Select Solution Package window

... your screen will appear like this:

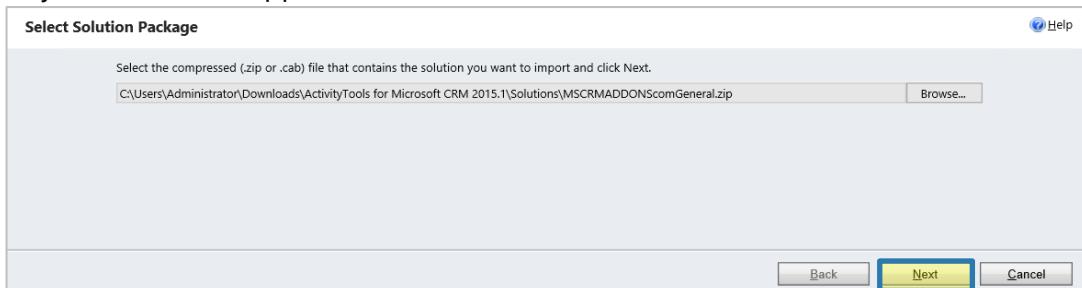


Figure 17: Select Solution Package

Now click on the [**Next**]-button...

... and the following window appears on the screen:

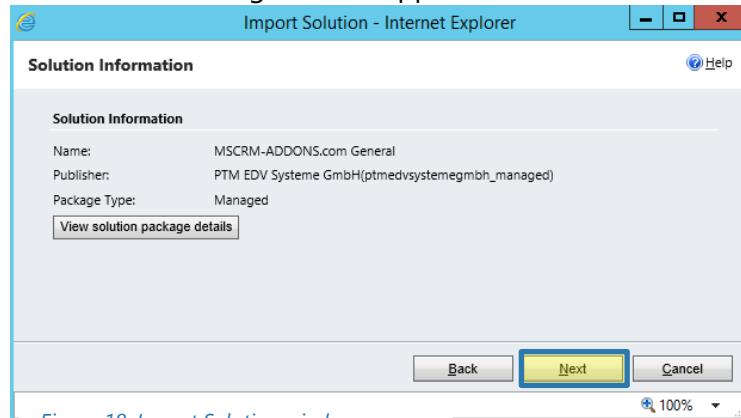


Figure 18: Import Solution window



If ActivityTools is already imported, the following window appears:

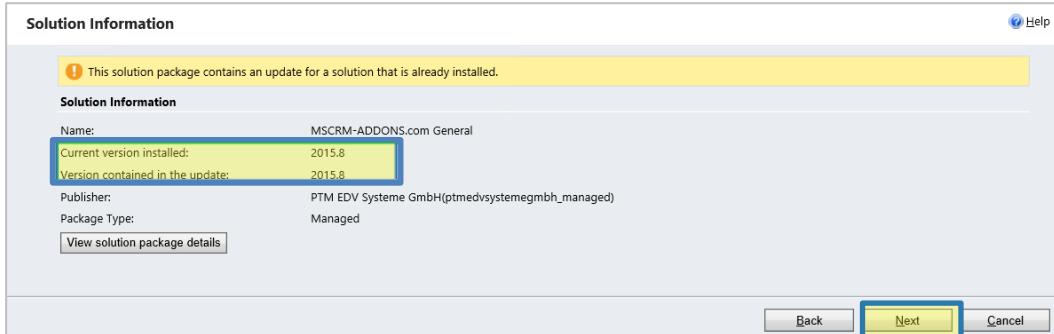


Figure 19: Import Solution window – installed solution

No matter which message appears, click on the [**Next**]-button in order to proceed.

The following window opens. Please choose the second point: *Overwrite customizations* and click on the **[Import]**-button.

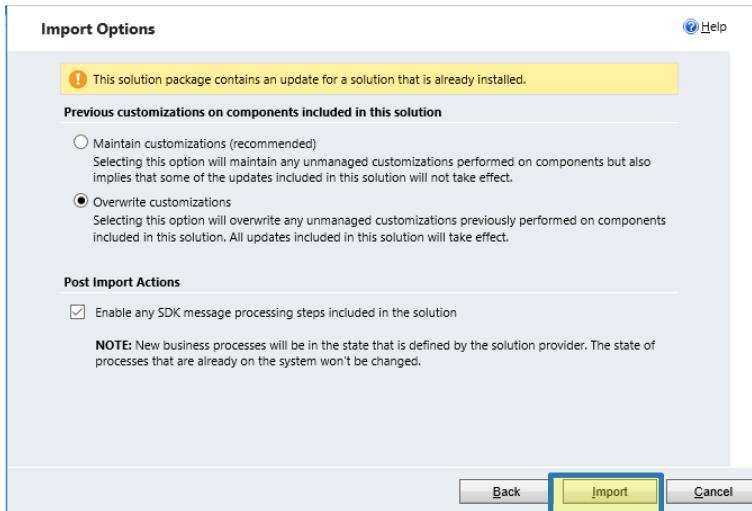


Figure 20: Import Solution package – overwrite customizations

The following window appears:

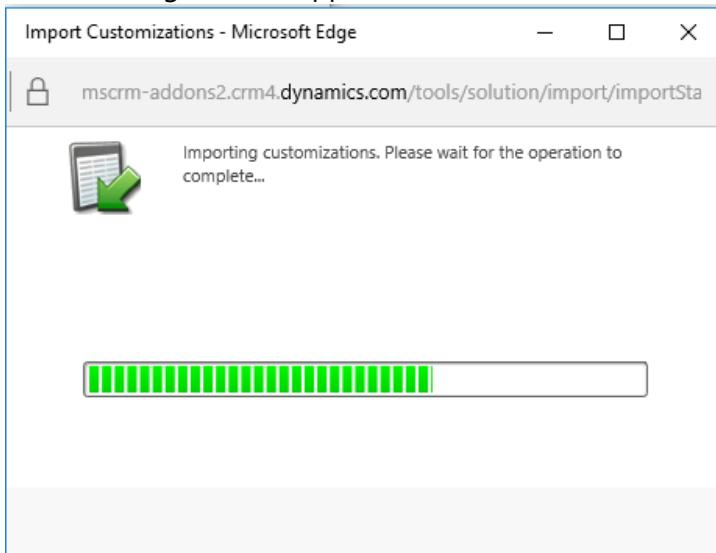


Figure 21: Import Customizations



The import might take up to a few minutes.

If everything went fine, the following window appears on your screen:

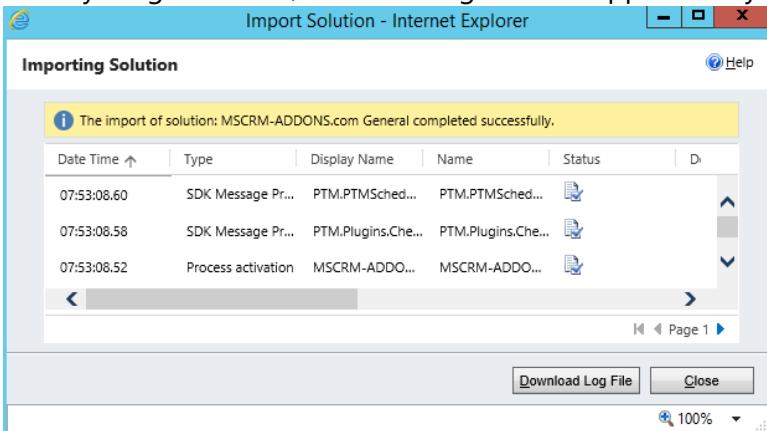


Figure 22: Import solutions successful.

This means that the import was successful. Please close this window and import the next file

ActivityToolsPluginCore by repeating all the steps.

Again, start with a click on the **[Import solutions]**-button.



Depending on the way you are going to use ActivityTools, you may also want to import the following non-compulsory files:

ACTIVITYTOOLSPLUGINCONFIG

Import this solution to use the email signature and its features.

ACTIVITYTOOLSPLUGINDEMO

Import this solution if you want to install an additional demo form for account and contact on which ActivityTools is already configured. These forms are only for demo purpose and should not be modified.

3.1 Additional information for Dynamics 365 versions only:

After importing the above solutions, you will have the base functionality of ActivityTools. If you also want to use the **[New Activity]**- or the **[Close]**-button, please import the *ActivityToolsPluginExtension*-solution as well.

ActivityTools for Dynamics 365 > Solutions

Name

 ActivityToolsPluginExtension.zip

Figure 23: Import solutions successful.

3.2 Launch ActivityTools

In case you have decided to install the demo forms as well, you can now give it a try. To do so open a *Contact* record and click on the drop-down menu next to the contact in order to switch to the *ActivityTools Demo Contact* view:

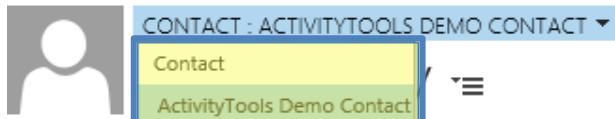


Figure 24: ActivityTools demo

Now your screen should look like this:

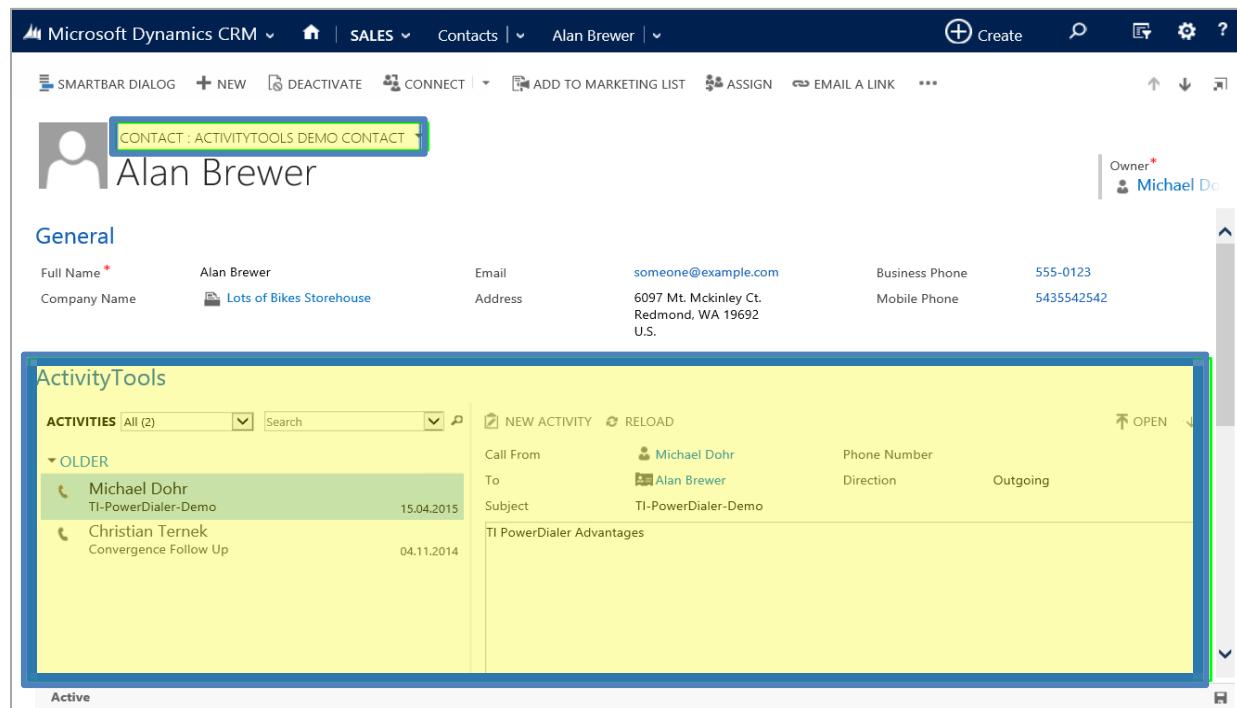


Figure 25: ActivityTools solution import result

That's it! You have successfully imported the ActivityTools solutions!

4 ActivityTools Organization Overview

ActivityTools offers two different ways to get an overview of the organization and the configuration.

While the Organization Overview and the Configuration Page are available for ActivityTools when installed via .exe installer, you depend on the Configuration Page only when you have installed ActivityTools via solution import.

Please find further information on how to get an overview when installing ActivityTools:

via .exe installer in chapter

[4.1 ACTIVITYTOOLS ORGANIZATION OVERVIEW WHEN INSTALLING ACTIVITYTOOLS VIA .EXE INSTALLER ON PAGE 21.](#)

[5 CONFIGURATION PAGE ON PAGE 24](#)

via solution import in chapter

[5 CONFIGURATION PAGE ON PAGE 24](#)

4.1 ActivityTools Organization Overview when installing ActivityTools via .exe installer

When working with the .exe installer, you first have to call up the CRM connection setup. To do so, enter *Configuration ActivityTools* in the search field of the start pane.

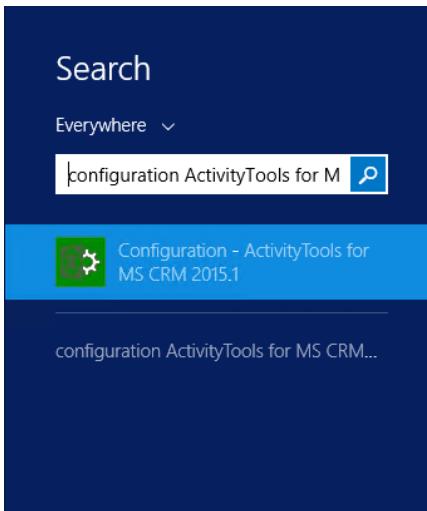
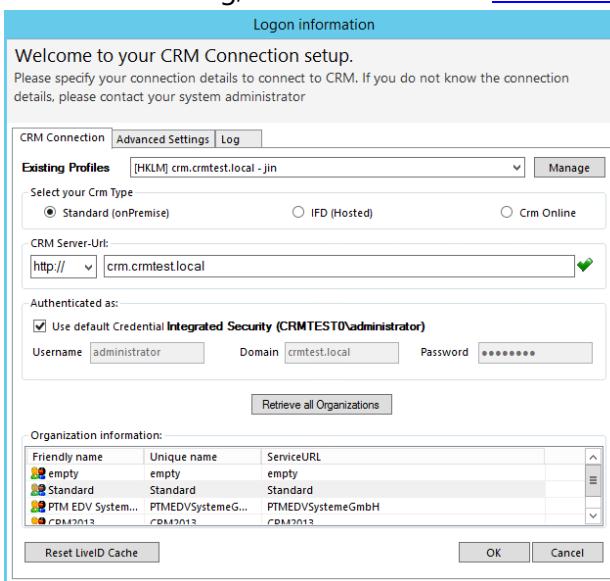


Figure 26: Search field -start pane

The CRM Connection setup dialog appears. Select the appropriate organization and click on the **[Retrieve all Organizations]-button** in order to continue. Usually you will simply have to click on the **[OK]-button** because the appropriate organization has already been selected by the system. Anyway, there is nothing wrong in double-checking the data. For further information on the CRM Connection dialog, have a look at our [Connection Dialog Documentation](#) on our website.



Friendly name	Unique name	ServiceURL
empty	empty	empty
Standard	Standard	Standard
PTM EDV SystemeG...	PTMEDVSystemeG...	PTMEDVSystemeGmbH
CRM2013	CRM2013	CRM2013

Figure 27: CRM Connection Dialog

The following organization overview appears:

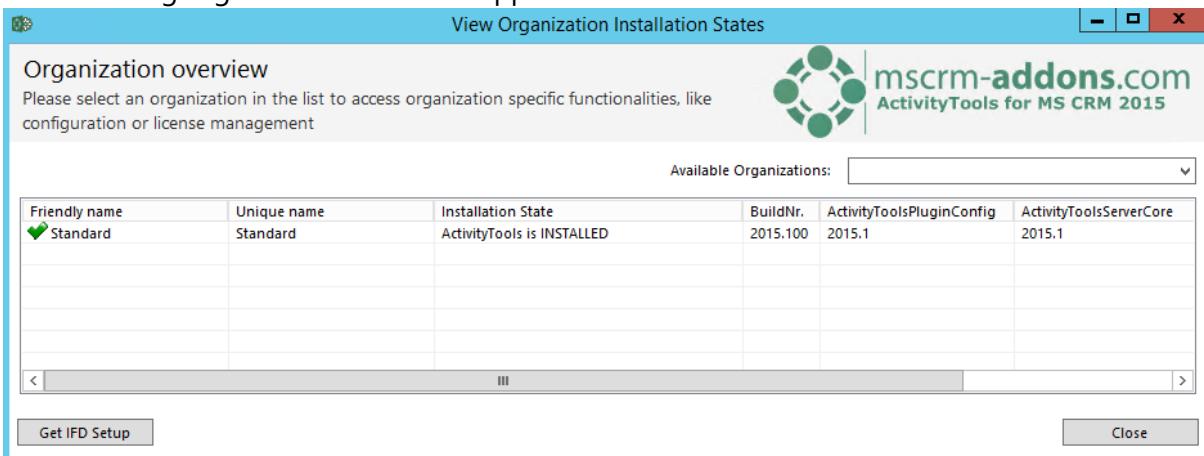


Figure 28: Organization overview

When you select your preferred organization in the list, specific function-buttons appear at the window bottom:

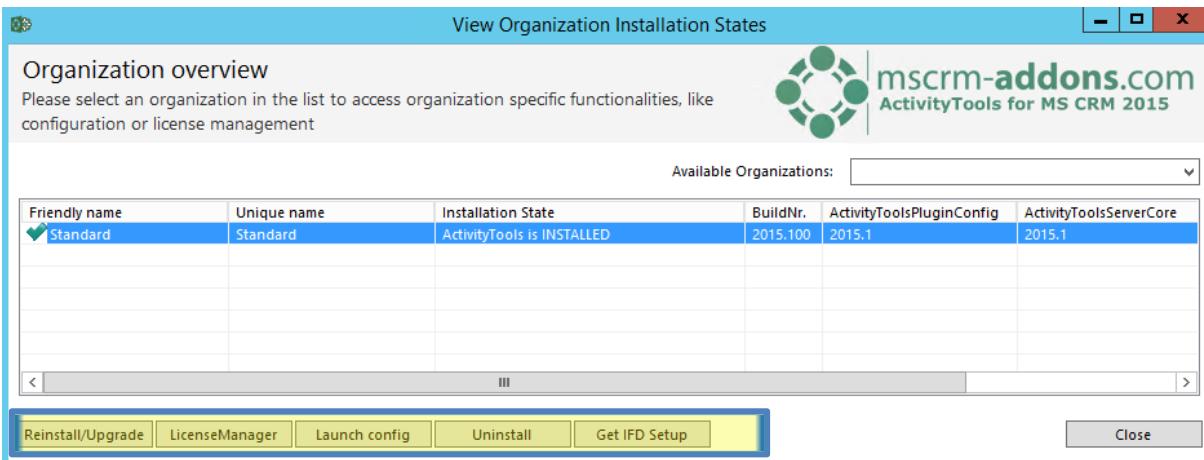


Figure 29: Organization overview – specific buttons

4.1.1 How to reinstall/upgrade

Select an organization in the Organization Overview and click on the **[Reinstall/Upgrade]**-button to reinstall or upgrade ActivityTools for Microsoft CRM 2015/2016 and Dynamics 365.

4.1.2 How to use the LicenseManager

Select an organization in the and click on the **[LicenseManager]**-button in order to open the LicenseManager. Another opportunity to open the LicenseManager is to search for *LicenseManager – ActivityTools for MS CRM 2015/2016* in the start pane and to hit *Enter* to start the program.

Anyway, after starting the *LicenseManager*, the following window appears:

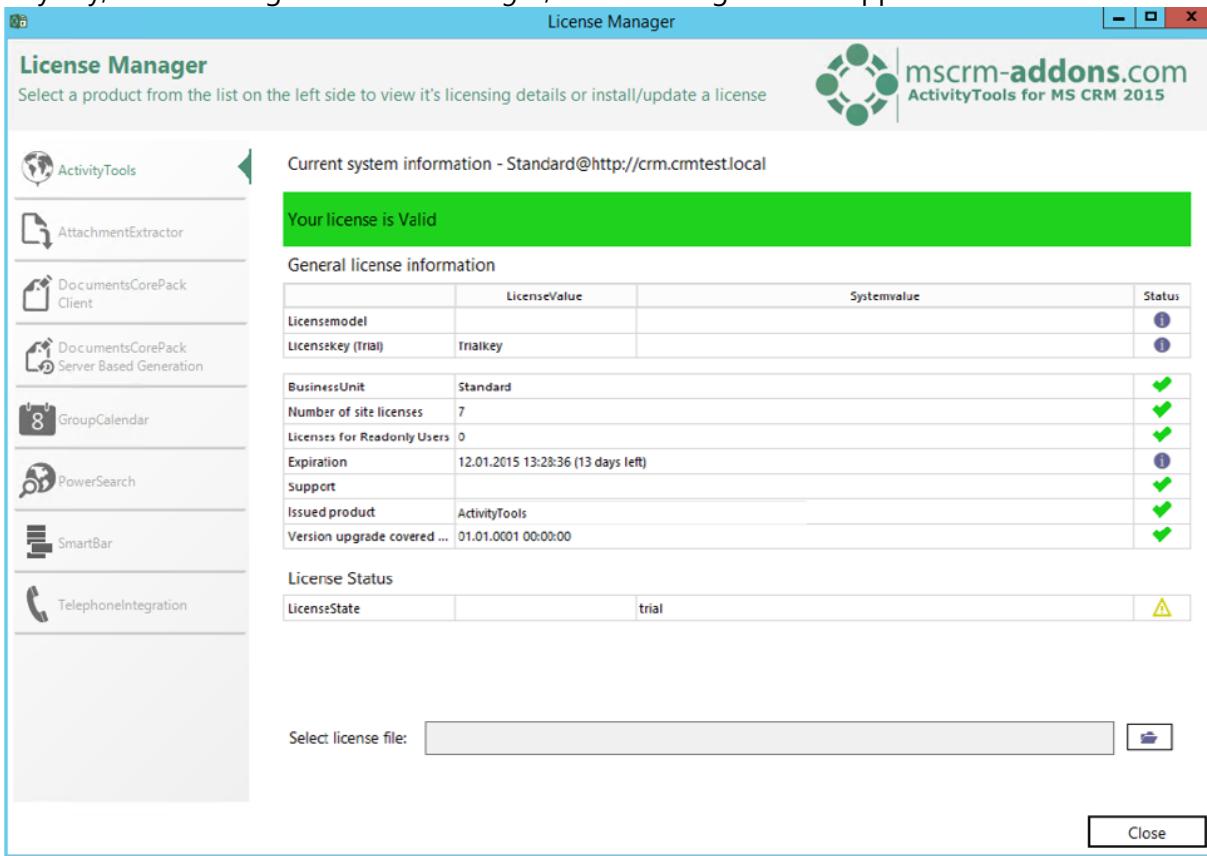


Figure 30: License Manager

The above figure shows a license that is valid. For further information on the License Manager, please have a look at our [License Manager Installation & User Guide](#) in the download-section of our website.

Please upload the license text file sent by our support-team with a click on the folder-symbol:

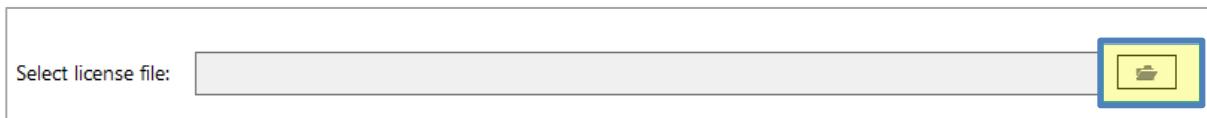


Figure 31: Select license file

In case you have any problems with your license, please do not hesitate to contact us immediately. To guarantee quick processing, we kindly ask you to send us an email with an attached screenshot of the issue to support@mscrm-addons.com. Our support team is looking forward to providing you with answers and solutions.

5 Configuration Page

The configuration of ActivityTools is very simple. To open the configuration, navigate to *CRM -> Settings -> mscrm-addons -> ActivityTools*.

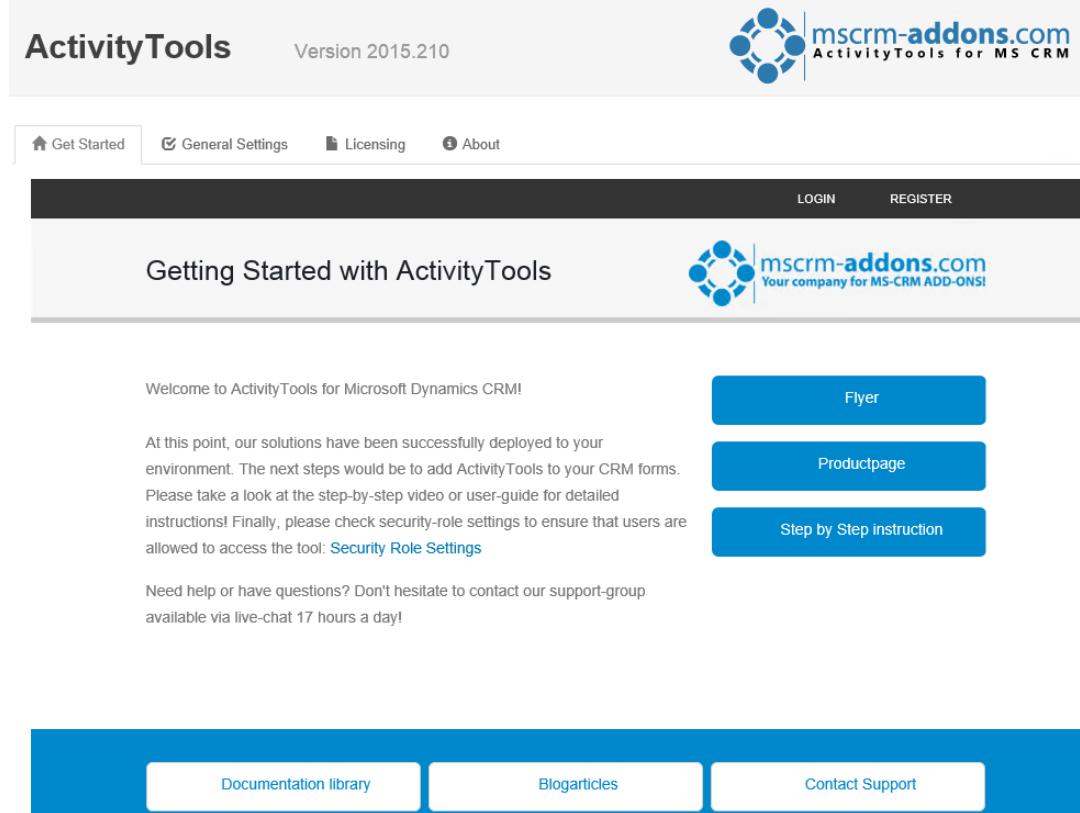


Figure 32: ActivityTools Configuration Page

The window that opens now is the *ActivityTools Configuration Page*. Its functionalities will be explained during the following chapters.

5.1 The Getting Started -Tab

This tab provides you with an overview, general information on ActivityTools and links to our website. All useful information about ActivityTools can be found here. If you scroll down the page, you might even find the different pricings for ActivityTools, a link to the documentation library, a link to some awesome blog articles and a contact button that links you directly with our support.

The screenshot shows the 'Getting Started' tab of the ActivityTools configuration page. At the top, there is a navigation bar with links for 'Get Started' (which is highlighted), 'General Settings', 'Licensing', and 'About'. Below the navigation bar is a dark header bar with 'LOGIN' and 'REGISTER' buttons. The main content area has a light gray background. On the left, the title 'Getting Started with ActivityTools' is displayed above a logo consisting of a blue circular icon with dots and the text 'mscrm-addons.com' followed by the tagline 'Your company for MS-CRM ADD-ONS!'. To the right of the title, there is a section with the heading 'Welcome to ActivityTools for Microsoft Dynamics CRM!' followed by a paragraph of text. To the right of this text are three blue rectangular buttons labeled 'Flyer', 'Productpage', and 'Step by Step instruction'. Below this section, there is another paragraph of text followed by a note: 'Need help or have questions? Don't hesitate to contact our support-group available via live-chat 17 hours a day!'. At the bottom of the page, there is a blue footer bar with three white rectangular buttons labeled 'Documentation library', 'Blogarticles', and 'Contact Support'.

Figure 33: ActivityTools Configuration Page – Getting Started tab

5.2 The General Settings -Tab

This tab allows you to change your general settings. Once changed, please do not forget to save the settings!

The screenshot shows the 'General Settings' tab of the ActivityTools configuration interface. The top navigation bar includes 'Get Started', 'General Settings' (which is selected), 'Licensing', and 'About'. The main content area is titled 'General Settings' and contains the following configuration items:

- 1 Debugging**: A radio button set to 'Disabled'. To its right is a search bar labeled 'last X hours' with a dropdown menu showing 'hours' and buttons for 'Show', 'Download', and 'Delete'.
- 2 Sort Activities By**: A dropdown menu showing 'createdon'.
- 3 Page Size**: A dropdown menu showing '150'.
- 4 Don't use MORE button**: A radio button set to 'Disabled'.
- 5 Status Filter**: A radio button set to 'Enabled'.
- 6 Confirm Advanced Search**: A dropdown menu showing '1000'.
- 7 Hide Activities in DropDown**: A dropdown menu showing 'email,phonecall...'.
- 8 Hide Activities in NEW ACTIVITY menu**: A dropdown menu showing 'email,phonecall...'.
- 9 Hide buttons on the Preview**: A dropdown menu showing 'btnNew,btnReload...'.
- 10 Update Language Setting**: A 'Update' button.
- 11 Start Layout Designer**: An 'Open' button.

At the bottom right of the configuration area is a 'Save' button.

Figure 34: ActivityTools Configuration – General Settings tab

1 DEBUGGING

Set this option on *enabled* if you want to activate debugging. Once activated, you can use the buttons at the right side to modify the debugging process.

A screenshot of the 'Debugging' configuration section. It shows a radio button set to 'Enabled' and a dropdown menu set to 'last 24 hours'. To the right are buttons for 'Show', 'Download', and 'Delete'.

Figure 35: ActivityTools Debugging enabled for the last 24 hours

Clicking on the [**Show**]-button displays all logs that were generated during the last xx hours (in this example 24 hours)

A click on the [**Download**]-button allows you to download the log-file (.xml).

The [**Delete**]-button enables you to delete the log-files.

② SORT ACTIVITIES BY

This setting can be used to define how the activities in the grid should be sorted.

If the setting is empty the default sort order will be used. For more info please check this article:
<http://www.mscrm-addons.com/Blog/PostId/9986/default-sort-order-for-activitytools>

In case you want to define a custom sort order you have two options.

1. Sort all activates based on a date-field of the ActivityPointer-entity. Just fill in the logicalname of the field (e.g. createdon).
2. Different date-fields should be used for different activity types. This can be done by using a custom XML, see underneath.

Example XML

```
<order def="createdon,scheduledstart,actualstart,actualend,modifiedon">
    <ent id="email" val="modifiedon,actualend,actualstart"></ent>
    <ent id="letter" val="modifiedon"></ent>
    <ent id="appointment" val="modifiedon"></ent>
    <ent id="phonecall" val="modifiedon"></ent>
    <ent id="task" val="ptm_customdatafield"></ent>
</order>
```

In the first line, you can insert a comma separated list of date fields which must stem from the ActivityPointer entity. This is the default sorting if no specific sorting for an activity has been set (AT tries to get the value of the first field. If null it tries to take the value of the next and so on).

If you would like to apply a sorting, you can define one or more date fields for every activity type (email, letter...). The activities will be sorted by these date fields.

```
<ent id="letter" val="modifiedon"></ent>
```

id="letter" : logical name of the activity

val="modifiedon" : Insert one or more date fields comma separated



Date fields that are only on the specific activity, must be marked with a dot. (e.g.: ptm_customdatafield)

3 PAGE SIZE

Define here how many records should be displayed at once.

4 DON'T USE MORE BUTTON

If this setting is set to true, all related activities will be loaded automatically in case of filtering.

5 STATUS FILTER

With this setting you can activate and deactivate the Status Filter. With the status filter activated, you can filter your activities according to the four activity states (Open, Completed, Canceled, Scheduled). These options will be added into the dropdown box on the left side from ActivityTools. If you activate this setting the first time, please hit the **[Update]**-button form the Update Language Setting.

Once you have done so, you will be provided with the following status fields:

OPEN

COMPLETED

CANCELED

SCHEDULED

Activity Tools

Figure 36: Status Filter Result

6 CONFIRM ADVANCED SEARCH

Whenever you start a *content search* with ActivityTools and there are more than 1000 activities to look up, you automatically get the following message:

The content search can take a long time.
Would you like to continue?

Figure 37: Content Search dialog

With the *confirm advanced search* setting, you can define, when the dialog should appear (depending on the number of activities). To deactivate this setting, simply set the number of activities to 0.

7 HIDE ACTIVITIES IN DROPDOWN

Here you can define activity-types which should not be displayed in the dropdown box on the left side. Please type in a comma separated list of the logical names (e.g. email, phone call).

8 HIDE ACTIVITIES IN NEW ACTIVITY MENU

Here you can define activity-types which should not be displayed in the NEW ACTIVITY menu on the right side. Please type in a comma separated list of the logical names (e.g. email, phone call).

9 HIDE BUTTONS ON THE PREVIEW

Here you can define buttons which should not be displayed in the Preview on the right side. Please type in a comma separated list of the HTML IDs of the buttons. Here is a list of the buttons with the HTML IDs:

NEW ACTIVITY (btnNew), RELOAD (btnReload), LOAD ALL (btnLoadAll), OPEN (btnOpenRec), PRINT (btnPrint), Close (btnCloseActivity), SEND (btnSend), FORWARD (btnForward), REPLY ALL (btnReplyAll), REPLY (btnReply)

For example: "btnNew,btnPrint" to hide the NEW ACTIVITY and the PRINT buttons.

10 UPDATE LANGUAGE SETTING

Click on this button to update the ActivityTools settings with the latest information of the CRM Activity-entities. This can be useful in the following cases:

- You have created a new custom Activity-entity in CRM, but ActivityTools does not show it in the *DropDown* or *New Activity* section.
- You have installed a new CRM language, but in the *DropDown* and *New Activity* section you still see labels in a wrong language.

11 START LAYOUT DESIGNER

Click on the **[Open]**-button in order to open the Layout Designer. For more information on the Layout Designer, please have a look at [CHAPTER 7 HOW TO USE ACTIVITY TOOLS LAYOUT DESIGNER ON PAGE 66](#).

5.3 The Licensing -Tab

This tab provides you with information regarding to the status of your license. Green checkmarks mean that your license is valid. Red crosses mean that your license is invalid.

License summary			
Licenseinformation	LicenseValue	Systemvalue	Status
LicenseState		valid	✓

General license information			
Licenseinformation	LicenseValue	Systemvalue	Status
Licensemodel	perSite		 ⓘ
Licensekey	boWr1zbhH23qFxQsExu+98BxuJfmlJ...	Licensekey installed	 ⓘ

License validation information			
Licenseinformation	LicenseValue	Systemvalue	Status
BusinessUnit	PTMEDVSystemeGmbH	PTMEDVSystemeGmbH	✓
Number of site licenses	40	37	✓
Licenses for Readonly Users	0	0	✓
Expiration	Never		✓
Support	06.10.2016 00:00:00	63 days left	✓
Issued product	ActivityTools	ActivityTools	✓
Version upgrade covered till	06.10.2016 00:00:00	01.01.0001 00:00:00	✓

Figure 38: ActivityTools Configuration – Licensing tab

Install license

Install License

Use this dialog to install the license for ActivityTools.

If you already have received an email with the license key form "support@mscrm-addons.com", please follow the steps below.

If you don't have a license yet and want to purchase one, please click on [Online Shop](#). It will link you directly to our Online Shop.

Of course you can contact us directly: [Email to Support](#)

Install the license:

1. Please open the email with the license key and extract the attached zip-file. Next select the unzipped text-file via the file dialog or copy its content into the following text box.

select file

2. To finish the installation, hit the "Install"-button.

If you click on the **[Install license]**-button, the *Install License dialog* opens.

Enter your license key here. To do so, simply follow the information provided by the dialog.

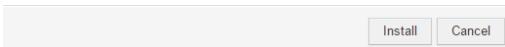
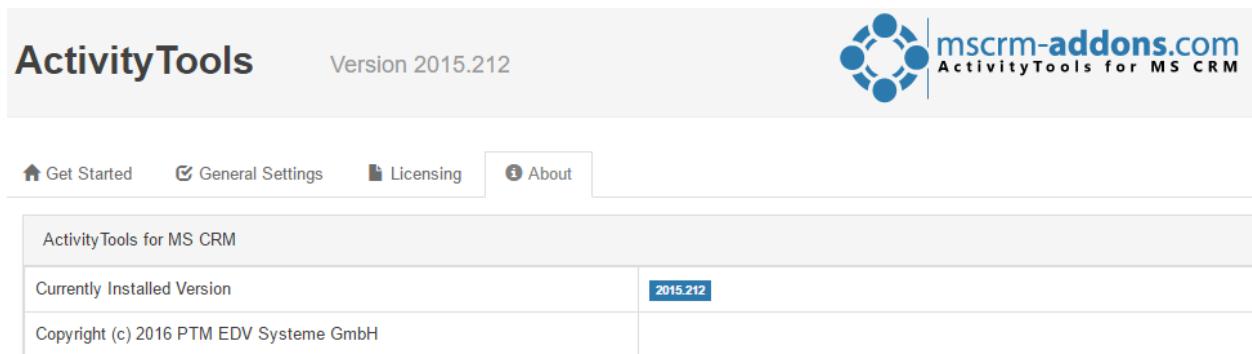


Figure 39: ActivityTools Install License dialog

5.4 The About -Tab

The About – Tab provides you with general information regarding to your license and the Copyright.



The screenshot shows the 'About' tab of the ActivityTools configuration interface. At the top, there is a header bar with the 'ActivityTools' logo and the text 'Version 2015.212'. To the right is the 'mscrm-addons.com' logo with the subtext 'ActivityTools for MS CRM'. Below the header, there is a navigation bar with four tabs: 'Get Started', 'General Settings', 'Licensing', and 'About', where 'About' is currently selected. The main content area contains three rows of information:

ActivityTools for MS CRM	
Currently Installed Version	2015.212
Copyright (c) 2016 PTM EDV Systeme GmbH	

Figure 40: ActivityTools Configuration – About tab

5.5 Additional settings

Most of the settings can be set in the general tab. However, there are a few that must be set manually in the ActivityTools product.

To open the ActivityTools product with settingskeys, please navigate to Settings > Products > ActivityTools. Here, you are provided with an overview on all the ActivityTools settingskeys.

The screenshot shows the Microsoft Dynamics 365 interface for managing products. The top navigation bar includes 'Dynamics 365', 'Settings' (with a dropdown arrow), 'Products', 'ActivityTools', and other options like 'Smartbar Dialog', 'New', 'Deactivate', 'Delete', 'Export to Word', 'Create Document', 'Email a Link', 'Run Workflow', 'Start Dialog', and a three-dot menu. Below the navigation is a section titled 'MSCRM-ADDONS.COM PRODUCTS : INFORMATION' with the heading 'ActivityTools'. A sub-section titled 'General' is selected. On the left, there's a table with columns for 'Name*', 'Product Type', 'ActivityTools server', 'Subscription Number', and 'Scheduler'. On the right, there's a grid titled 'Active MSCRM-ADDONS.com Settings...' showing records for ATCFormXML[appointment]Default, ATCFormXML[email]Default, ATCFormXML[phonecall]Default, and ATCLanguages, each with their respective KeyValue and Created On dates (all 2/20/2017 4:56 PM).

Name*	Product Type	ActivityTools server	Subscription Number	Scheduler
ATCFormXML[appointment]Default		<form id="Default" entity="appointment"> ...	2/20/2017 4:56 PM	...
ATCFormXML[email]Default		<form id="Default" entity="email"> ...	2/20/2017 4:56 PM	...
ATCFormXML[phonecall]Default		<form id="Default" entity="phonecall"> ...	2/20/2017 4:56 PM	...
ATCLanguages		<Languages><Activities><ent id="appointment"> ...	2/20/2017 4:56 PM	...

Figure 41: ActivityTools product settings

Please add a new Settingskey-record to define a new ActivityTools setting. If you haven't created a settingskey so far, please have a look [at this article](#). During the next chapters, you will find brief tutorials on how to add additional settings like custom buttons, format grid items or a plugin filter.

5.5.1 Custom buttons

Via the "ATCCustomButtons" setting custom buttons can be added to the top of the preview. On click, they execute a defined custom JScript function.

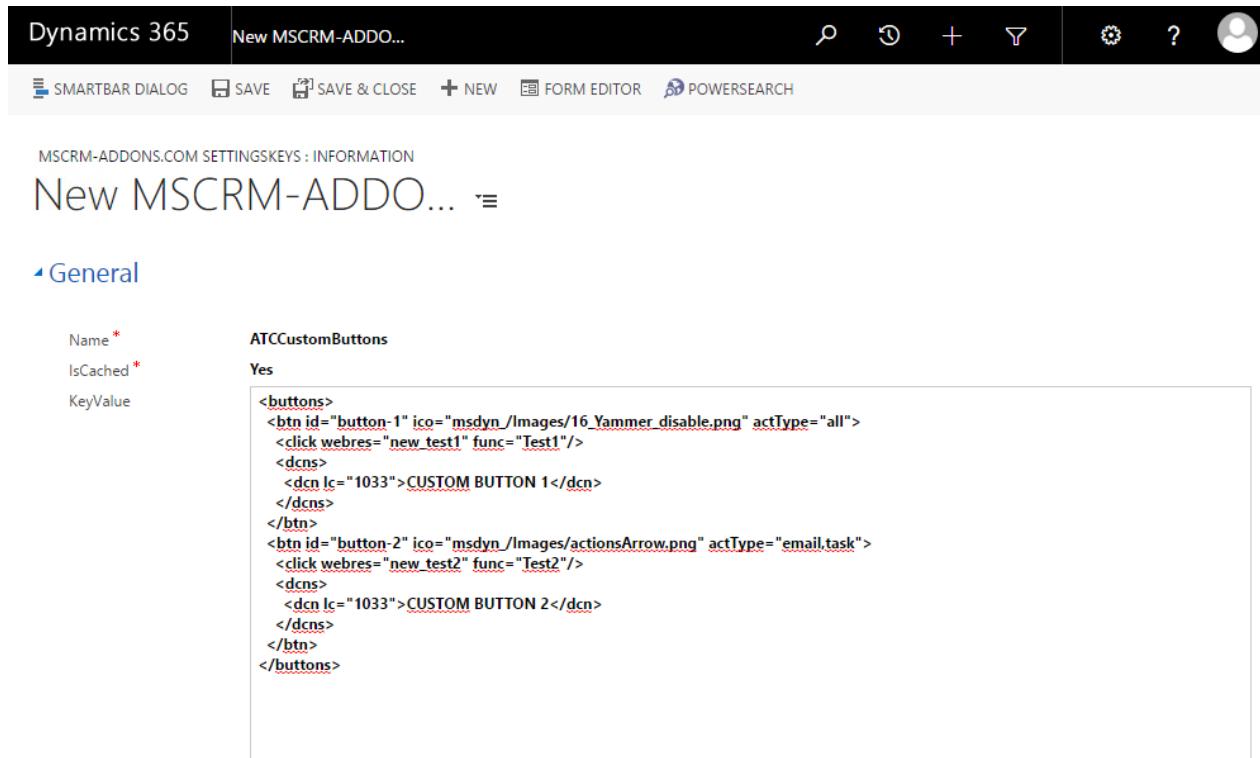


Figure 42: ATCCustomButtons settingskey

Example

XML:

```

<buttons>
    <btn id="button-1" ico="msdyn_/_Images/16_Yammer_disable.png" actType="all">
        <click webres="new_test1" func="Test1"/>
        <dcns>
            <dcn lc="1033">CUSTOM BUTTON 1</dcn>
        </dcns>
    </btn>
    <btn id="button-2" ico="msdyn_/_Images/actionsArrow.png" actType="email.task">
        <click webres="new_test2" func="Test2"/>
        <dcns>
            <dcn lc="1033">CUSTOM BUTTON 2</dcn>
        </dcns>
    </btn>
</buttons>

```

Every **btn** node represents a custom button. It needs a unique ID that must start with button-XXXX defined in the **id** attribute.

Via its **icon** attribute the icon of the button can be defined. For example, insert the name of CRM web resource containing an image.

If you want the button to be visible for all activity types, please insert 'all' into the **actType** attribute. Otherwise, simply enter the logical name of every activity type you want the button to be visible for separated by comma.

The **click node** defines what should happen on button-click. The **webres** attribute must contain the name of the JScript CRM webresource containing the script. The **func** attribute the name of the function which should be executed.

The **dcn nodes** are used to define the display text of the button. For each language a different text can be defined. The **lc** attribute has to contain the language code and the **node value** the display text.

This is how the buttons the buttons will look like by using the above XML:

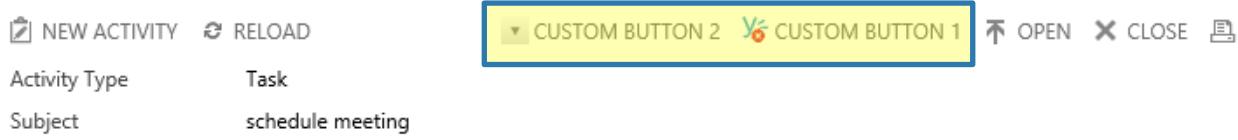


Figure 43: Custom button - Result

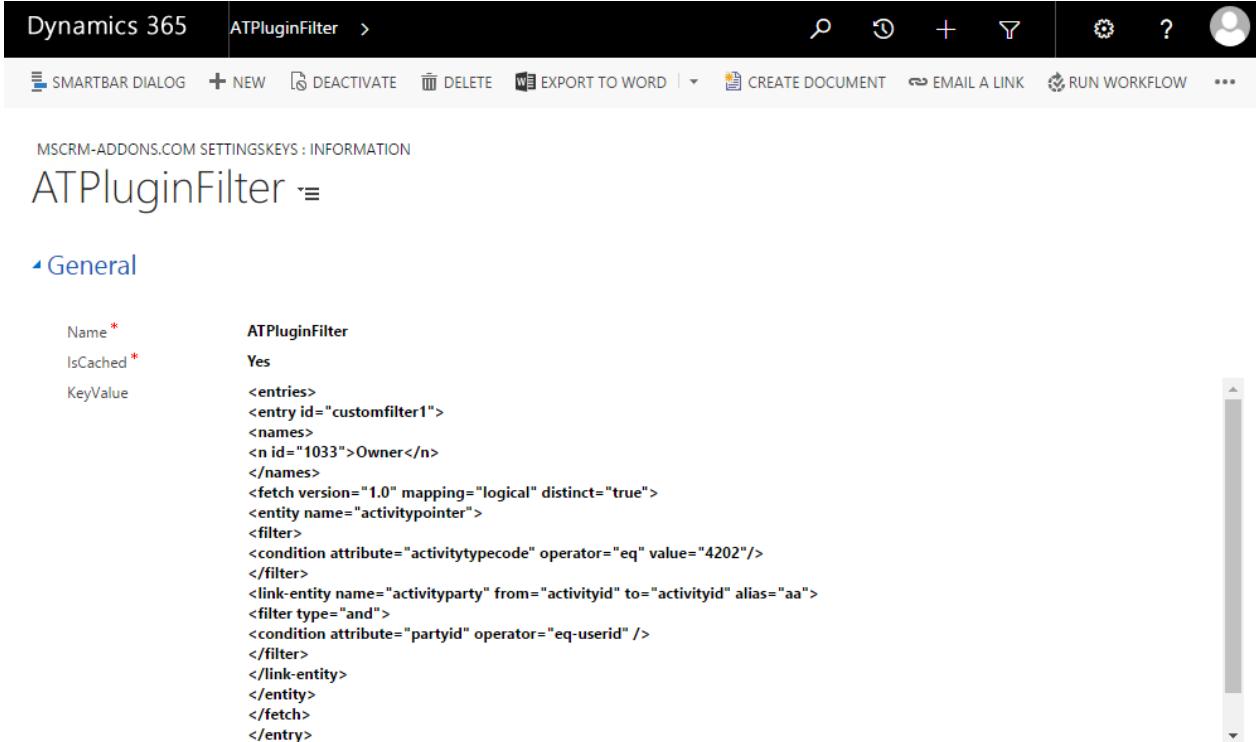
5.5.2 Grid Custom Columns

Via the "GridCustomColumns" setting custom columns can be added to the grid of ActivityTools. This can be used to display additional CRM fields.

More information can be found [here](#).

5.5.3 ATPluginFilter

Via the "ATPluginFilter" setting you can define custom activity filter options.
For example, to show only related activities which a specific Dynamics 365 user is involved in.



The screenshot shows the Dynamics 365 Settings Keys interface. The top navigation bar includes links for SMARTBAR DIALOG, NEW, DEACTIVATE, DELETE, EXPORT TO WORD, CREATE DOCUMENT, EMAIL A LINK, RUN WORKFLOW, and more. The main content area displays the 'MSCRM-ADDONS.COM SETTINGSKEYS : INFORMATION' section, specifically the 'ATPluginFilter' settings. The 'General' tab is selected. The configuration details are as follows:

Name *	ATPluginFilter
IsCached *	Yes
KeyValue	<pre><entries> <entry id="customfilter1"> <names> <n id="1033">Owner</n> </names> <fetch version="1.0" mapping="logical" distinct="true"> <entity name="activitypointer"> <filter> <condition attribute="activitytypecode" operator="eq" value="4202"/> </filter> <link-entity name="activityparty" from="activityid" to="activityid" alias="aa"> <filter type="and"> <condition attribute="partyid" operator="eq-userid" /> </filter> </link-entity> </entity> </fetch> </entry></pre>

Figure 44: ATPluginFilter

Example XML:

```
<entries>
<entry id="customfilter1">
<names>
<n id="1033">Owner</n>
</names>
<fetch version="1.0" mapping="logical" distinct="true">
<entity name="activitypointer">
<filter>
<condition attribute="activitytypecode" operator="eq" value="4202"/>
</filter>
<link-entity name="activityparty" from="activityid" to="activityid" alias="aa">
<filter type="and">
<condition attribute="partyid" operator="eq-userid" />
</filter>
</link-entity>
</entity>
</fetch>
</entry>
</entries>
```

Every **entry node** represents a filter option in the dropdown menu of ActivityTools. Its id attribute must contain a unique ID, for example customfilter1, customfilter2, customfilter3 etc.

Optional you can add the showfor attribute to only show the filter for ActivityTools embedded on specific entities (e.g. only show if embedded on the case or lead entity: showfor="incident,lead").

N nodes contain the display text per language. Every **n node** contains the **language code** in its **id attribute** and the **display text** is the value.

Next, insert a **fetch XML**. The conditions will be used to filter the related activities.

The easiest way to generate the fetch is via CRM by using the Advanced Find.

Please note, the main entity of the fetch has to be the activitypointer entity. From there you can add relationship to related entities (e.g. activityparty).

Our example filter will only show email activities which contain the current user in any party list field (e.g. From, To, CC, BCC, ...).

By using the above filter XML the "Owner"-entry will be added. If the filter is checked it takes effect after closing the dropdown box.

▲ Activity Tools

The screenshot shows the Microsoft Dynamics CRM interface with the 'ACTIVITIES (14)' tab selected. A dropdown menu is open under the 'ACTIVITIES' tab, listing various activity types: Open, Completed, Canceled, Scheduled, Owner, Appointment, Campaign Activity, Campaign Response, Case Resolution, Chat, Email, Fax, Letter, Opportunity Close, Order Close, Phone Call, Quote Close, Recurring Appointment, Service Activity, and Social Activity. The 'Owner' option is highlighted with a yellow background. Below the dropdown, a list of activities is displayed, each with a subject, owner, and creation date. The activities listed are: Visual (sample) (Owner), Fix the problem (sam), Customer (sample), Sample, Opened (sample), Solved, and Solution Provided. All activities have a creation date of 2/7/2017 or 2/8/2017, except for the first one which is 2/9/2017.

Activity Type	Subject	Owner	Created On
Email	Visual (sample)	✓	2/9/2017
Email	Fix the problem (sam)	✓	2/8/2017
Email	Customer (sample)	✓	2/8/2017
Email	Sample		2/7/2017
Email	Opened (sample)	✓	2/7/2017
Email	Solved	✓	2/7/2017
Email	Solution Provided	✓	2/7/2017
Email	(sample)		2/7/2017

Figure 45: ATPluginFilter Result

5.5.4 Format Grid Items

By using the "ATFormatGridItems" setting you can define a custom styling for specific activities in the grid. E.g. highlight all draft emails in the grid.

The screenshot shows the Dynamics 365 Settings screen with the title 'New MSCRM-ADDO...'. Under the 'General' tab, there is a configuration section for 'ATFormatGridItems'. The 'Name*' field is set to 'ATFormatGridItems'. The 'IsCached*' field is set to 'Yes'. The 'KeyValue' field contains the following XML code:

```
<entities>
<ent name="email">
<formats>
<form fstyle="border-left: 2px solid blue">
<conds>
<cond attr="statuscode" val="4"></cond>
<cond attr="sie_read" val="false"></cond>
</conds>
</form>
<form fstyle="border-left: 2px solid gray">
<conds>
<cond attr="statuscode" val="1"></cond>
</conds>
</form>
</formats>
</ent>
</entities>
```

Figure 46: ATFormatGridItems

Example XML:

```
<entities>
<ent name="email">
<formats>
<form fstyle="border-left: 2px solid gray">
<conds>
<cond attr="statuscode" val="4"></cond>
</conds>
</form>
<form fstyle="border-left: 2px solid blue;">
<conds>
<cond attr="statuscode" val="1"></cond>
</conds>
</form>
</formats>
</ent>
</entities>
```

Every **ent name node** must contain the logical name of the activity which should be formatted. Each can have multiple **form nodes**, which contain the format settings defined in the fstyle attribute. The value has to be one or more valid css statements (same as inline style in HTML). The **cond node** allows to configure conditions. Its attr attribute has to contain the logical name of a CRM field of the activity, its val attribute a possible value. Only if all conditions are true, the formatting will be used. It is required to add at least one condition. For example:

```
<cond attr="statuscode" val="4"></cond>
```

attr: the logical name of a CRM attribute of the activity, here: statuscode

val: the value the activity must have to be formatted, here: 4

This is the result by using the above XML:

Activity Tools

POSTS (+) ACTIVITIES (15) NOTES

All (15) Quick Search

TODAY

- ✉ Patrick Ofner PowerSearch 2:54 PM
- ☐ Patrick Ofner Meeting 2:54 PM
- ✉ Patrick Ofner DocumentsCorePack 2:52 PM
- ✉ Patrick Ofner ActivityTools 2:51 PM
- ☑ Patrick Ofner Meeting 12:47 PM

OLDER

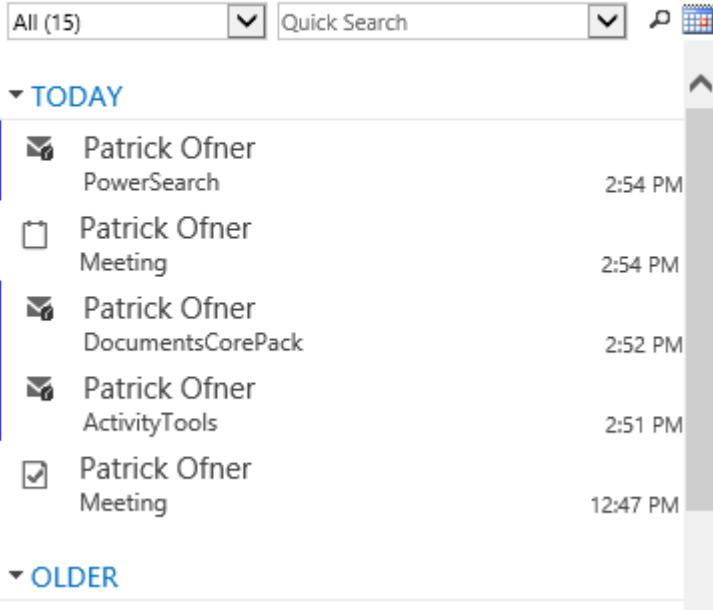


Figure 47: Result by using XML

Another example would be to format activities with priority "High":

```
<cond attr="prioritycode" val="2"></cond>
```

6 How to embed ActivityTools in Microsoft Dynamics CRM

To embed ActivityTools into CRM you have a few different options. Either you embed ActivityTools

- via form script into CRM Social Pane

(please have a look at chapter [6.1 EMBED ACTIVITYTOOLS VIA FORM SCRIPT INTO CRM SOCIAL PANE ON PAGE 42](#) for more information)

- via Web Resource

(please have a look at chapter [6.2 EMBED ACTIVITYTOOLS VIA WEB RESOURCE ON PAGE 47](#) for more information)

- into Form Menu – Entity Related Preview

(please have a look at chapter [6.3 EMBED ACTIVITYTOOLS INTO FORM MENU – ENTITY RELATED PREVIEW ON PAGE 50](#) for further information)

- in Dashboards

(please have a look at chapter [6.4 EMBED ACTIVITYTOOLS IN DASHBOARDS ON PAGE 55](#) for further information)

- in CRM SiteMap – User Related Preview

(please have a look at chapter [6.5 EMBED MYACTIVITIES IN ON PAGE 59](#) for further information)

6.1 Embed ActivityTools via form script into CRM Social Pane

ActivityTools can be embedded via form script into CRM Social Pane on any entity. It simply replaces the CRM integrated social pane-activities. Usually, the CRM activity section looks like the figure below.

The screenshot shows the 'CONTACT' view for 'Zac Smith (Sample)'. At the top, there's a contact icon and a 'CONTACT' dropdown. Below it is the contact's name, 'Zac Smith (Sample)', followed by a three-dot menu icon. The main area is titled 'CONTACT INFORMATION' and contains the following fields:

Field	Value
Full Name *	Zac Smith (Sample)
Job Title	Orderman
Account Name	Sample Account 1
Email	zac@sample.at
Business Phone	123456789
Mobile Phone	123456789
Fax	123456789
Preferred Method of	Any
Address	Street 1 Street, Street 9020 Street

To the right of the contact information, there are tabs for 'POSTS', 'ACTIVITIES', 'NOTES', and 'ONENOTE'. The 'ACTIVITIES' tab is selected, showing a message: 'We didn't find any activity records.' Below the tabs are buttons for 'All Entities' (with a dropdown arrow), 'Add Phone Call', 'Add Task', and a three-dot menu. At the bottom right are filter and search icons.

Figure 48: Regular CRM Activity Section

To integrate ActivityTools, open a random record and click on the **[Form]**-button in the command bar.



Figure 49: Command bar: [Form]-button

In the next window select the Home-tab and select the **[Form Properties]**-button.

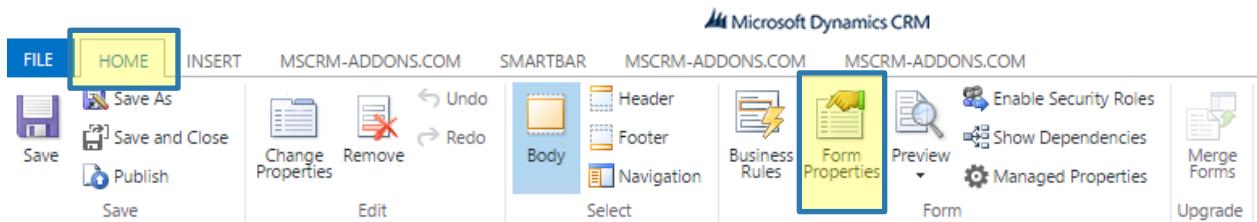


Figure 50: Open form properties

In the following window, click on the **[+ Add]**-button in the "Form Libraries" section.

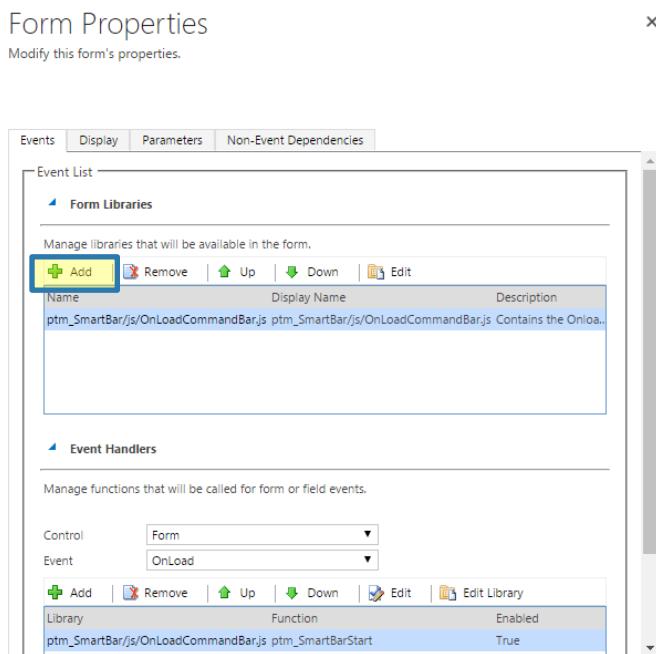


Figure 51: Form properties window

This action opens a Look-up window.

For Dynamics 365 versions of ActivityTools, search for *ptm_ActivityTools/Extension/js/onload.js* and click the **[Add]-button**. If you cannot find the „*ptm_ActivityTools/Extension/js/onload.js*“ web resource, please ensure that you have the “ActivityToolsPluginExtension” solution installed. For more information please check at [CHAPTER ADDITIONAL INFORMATION FOR DYNAMICS 365 VERSIONS ONLY: ON PAGE 18](#). If you have installed ActivityTools via AppSource you can also find the “ActivityToolsPluginExtension” solution [here](#).

For CRM 2015/2016 version of ActivityTools, search for *ptm_ActivityTools/js/onload.js* and click on the **[Add]-button**, like you can see in the figure below.

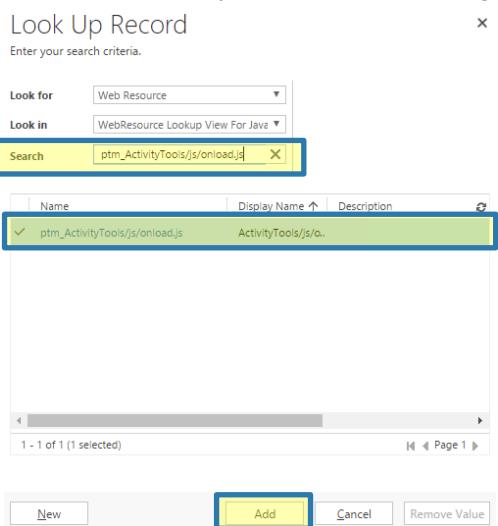


Figure 52: ActivityTools Look-up window

Now the *Form Properties* window should look like the below figure.

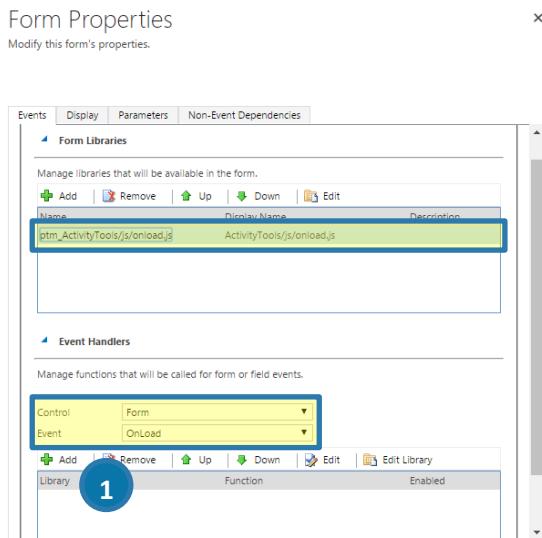


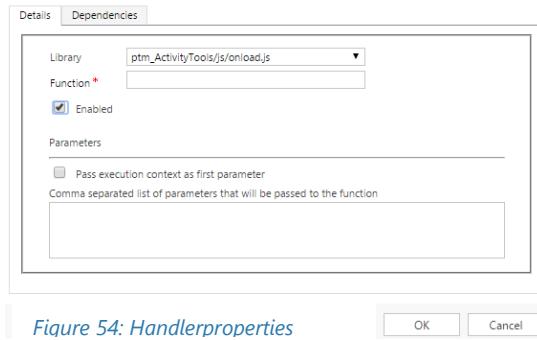
Figure 53: Form properties

Make sure that the settings look like above.

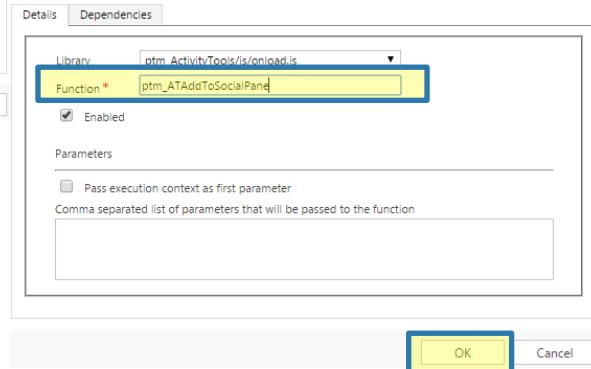
Then click on the **[Add]-button** ① in the *Event Handlers* section.

The following window opens:

Handler Properties



Handler Properties



Insert *ptm_ATAddToSocialPane* to the *Function**-Textbox and click on the **[OK]-button**. Also, in the next window, click on the **[OK]-button** in order to proceed.

In the next overview, drag and drop the new form to its future place. Click on the **[Save]-button** and on the **[Publish]-button**.

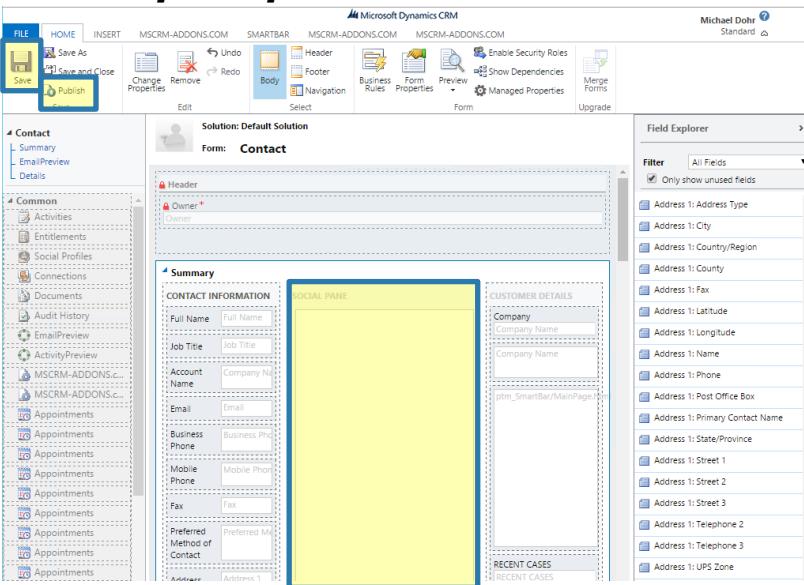


Figure 55: Arrange Social Pane

Now return to your contact entity and refresh the page with F5. This is how your new activity section could look like thanks to ActivityTools:

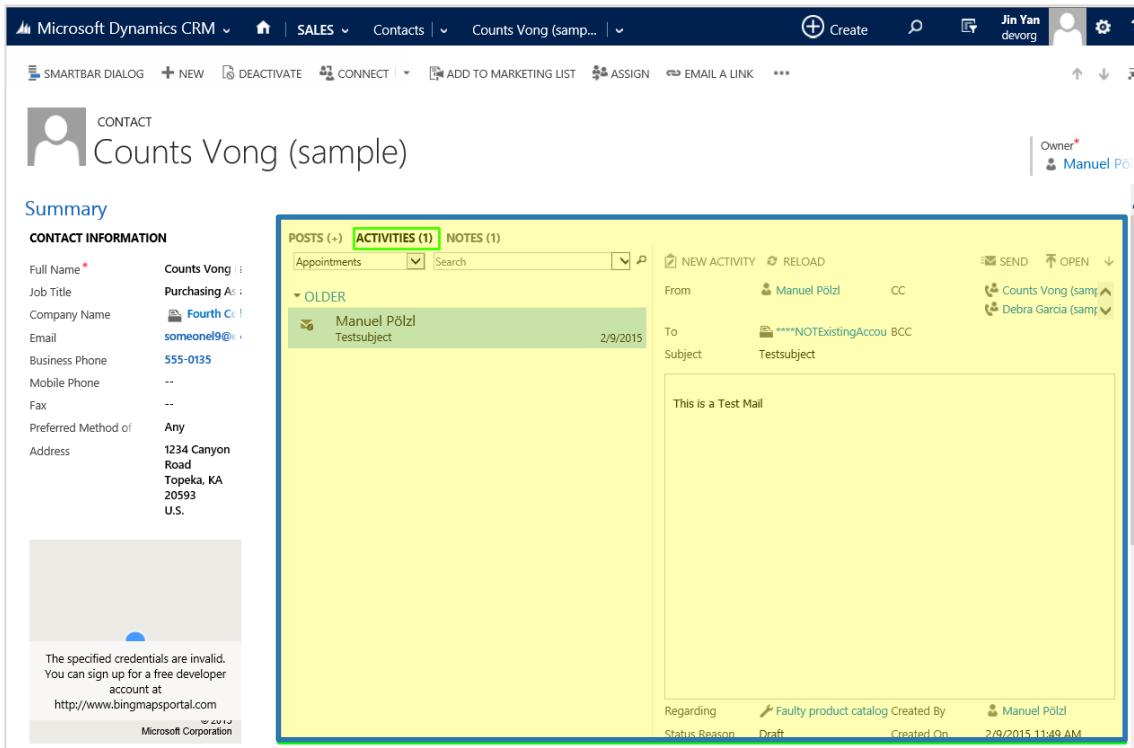


Figure 56: ActivityTools - Result

6.2 Embed ActivityTools via Web Resource

ActivityTools for MS Dynamics CRM 2015/2016 and Dynamics 365 can also be embedded into the entity form at a preferred place. This can be done via web resources. To do so, open the entity into which you want to embed ActivityTools and click the **[Form]-button** in the command bar.

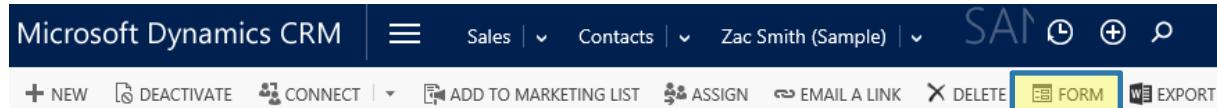


Figure 57: Command bar: **[Form]-button**

In the next window select the *Insert*-tab and choose select the **[Web Resource]-button**.

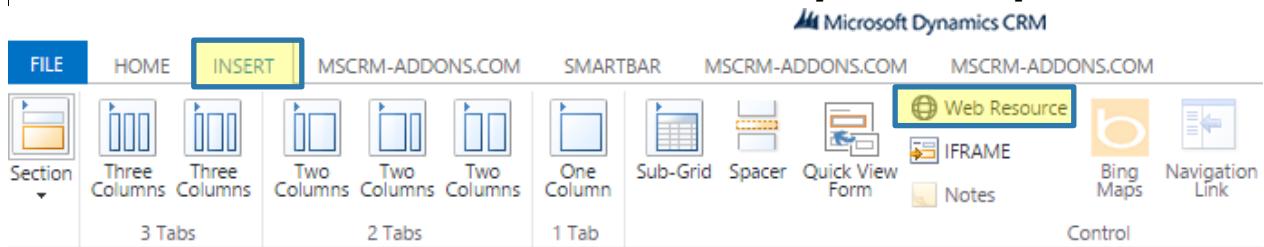


Figure 58: Open Web Resource

The *Add Web Resource*-window opens. Insert *ptm_ActivityTools/MainPage.html* in the web resource field. If it does not appear automatically, click on the *Magnifier* and *Look up More Records*. Anyways, as soon as you have finished your search, select a proper name for your web resource and insert it into the *Field Name and Properties*. Then click on the **[OK]-button** to proceed.

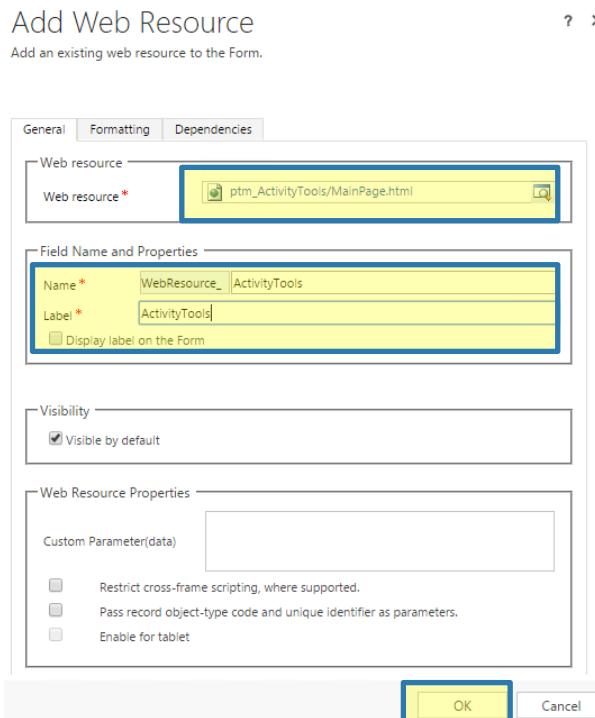


Figure 59: Add Web Resource

In the next overview, drag and drop the new form to its future place. Then return to the *Home*-tab and click on the **[Save]**-button and on the **[Publish]**-button.

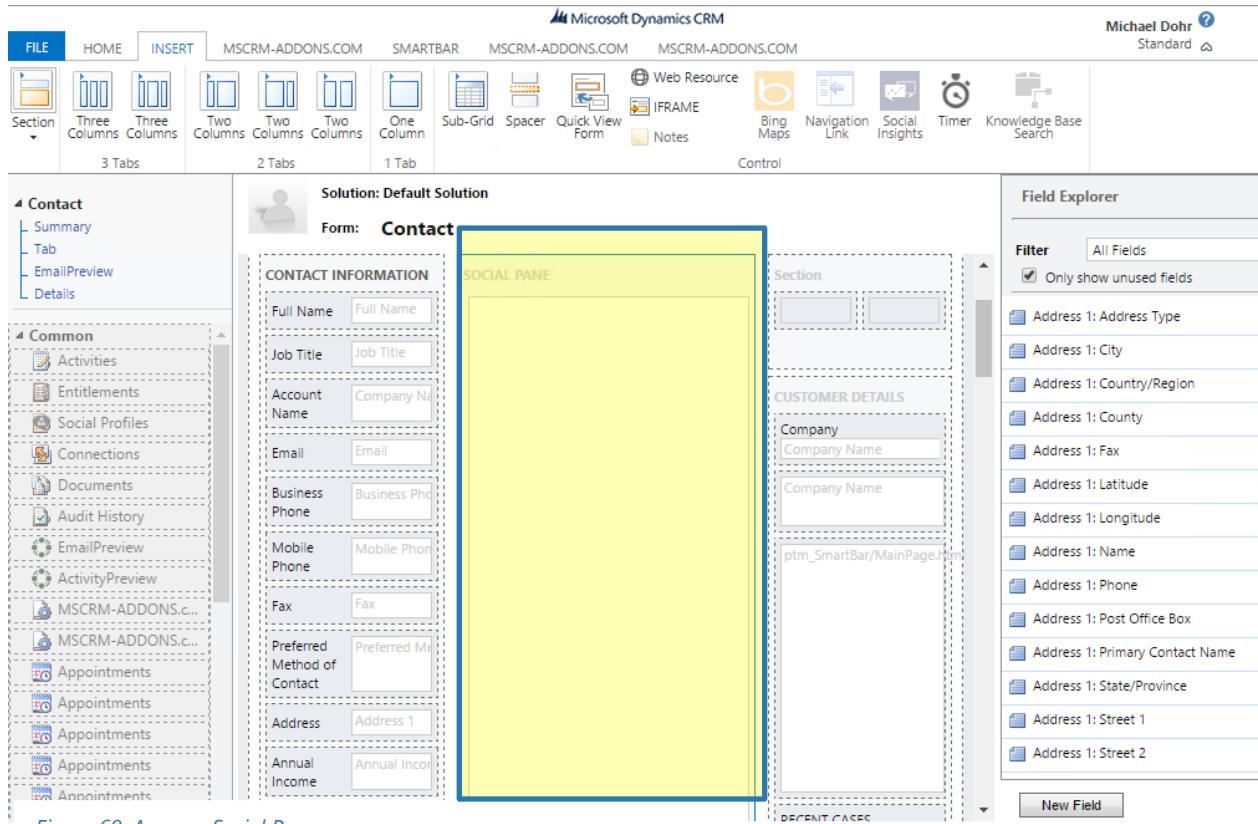


Figure 60: Arrange Social Pane

As soon as the settings are saved, navigate to the entity you wanted to add ActivityTools to. Refresh the page with F5. Your entity should look like the figure below.

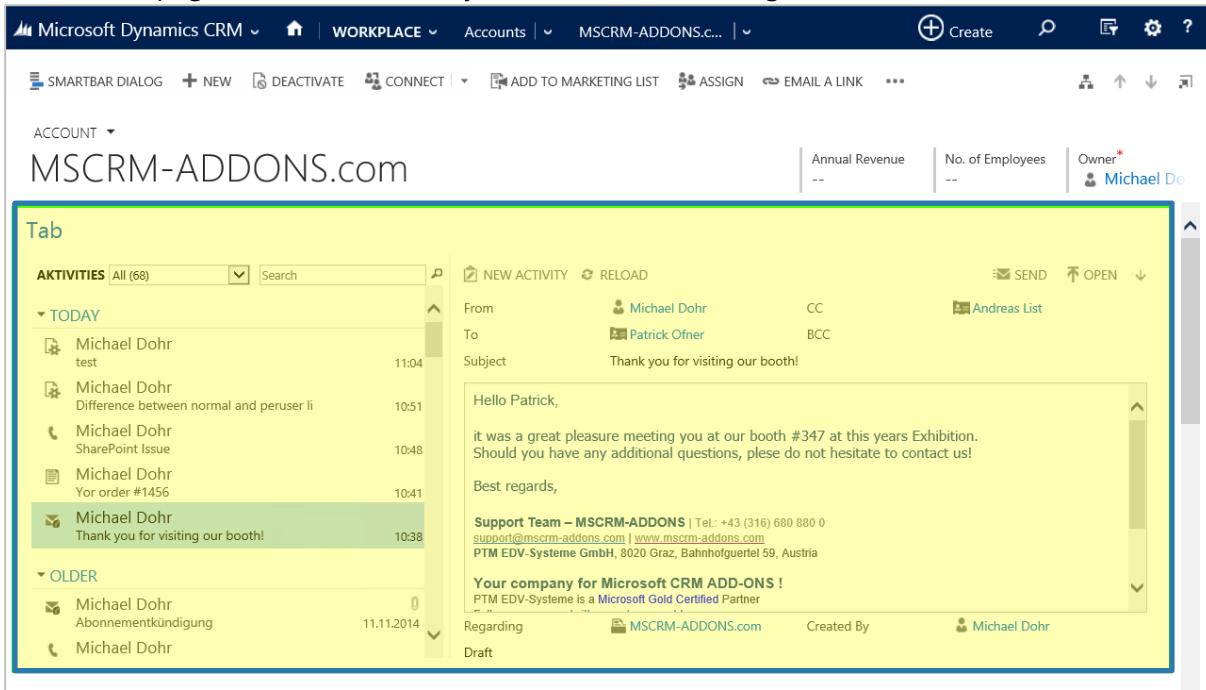


Figure 61: ActivityTools Webresource - Result

6.3 Embed ActivityTools into Form Menu – Entity Related Preview

It is also possible to embed entity-related ActivityTools preview into the CRM command bar via CRM Form Menu. This is very useful in case the preview should only be accessed via command bar without appearing in the entity form itself.

We will integrate the ActivityTools preview into our *Leads*-entity. Therefore, open your CRM and navigate to *Sales* and *Leads*. Click on a random lead to open it.

The screenshot shows the Microsoft Dynamics CRM interface. At the top, there's a navigation bar with 'Microsoft Dynamics CRM', 'Sandbox' (highlighted), and various menu icons. Below the navigation bar is a toolbar with actions like '+ NEW', 'DELETE', 'EMAIL A LINK', 'RUN REPORT', 'EXCEL TEMPLATES', 'EXPORT TO EXCEL', 'IMPORT DATA', and a search bar. The main area is titled 'My Open Leads' and displays a list of leads. One lead, '(Sample) Singer', is selected and highlighted with a yellow background. The list includes columns for Name, Topic, Status Reason, and Created On. The 'Name' column for '(Sample) Singer' contains the value '(Sample) Singer'.

Figure 62: Open Lead

In the command bar of the opened lead, select the *Form Editor*.

The screenshot shows the Microsoft Dynamics CRM lead form for '(Sample) Singer'. The top navigation bar has links for 'LEAD', 'EXPORT TO WORD', 'CREATE DOCUMENT', 'QUALIFY', 'DISQUALIFY', 'ADD TO MARKETING LIST', 'ASSIGN', 'SHARE', and a 'More' button. Below the navigation bar is a toolbar with steps: 'Qualify (Active)', 'Develop', 'Propose', and 'Close'. The 'Develop' step is currently active. The 'More' button dropdown is open, showing options like 'Email a Link', 'Follow', 'Run Workflow', etc., with 'Form Editor' highlighted and highlighted with a yellow background. The main form area shows contact details, activity posts, and stakeholders.

Figure 63: Open the form editor

In the window that opens now, click on *Navigation*. Then, the focus will be set on the Navigation sector. Select the area where the new entry should be added. In our example, we want the preview to be shown within the *Sales* area.

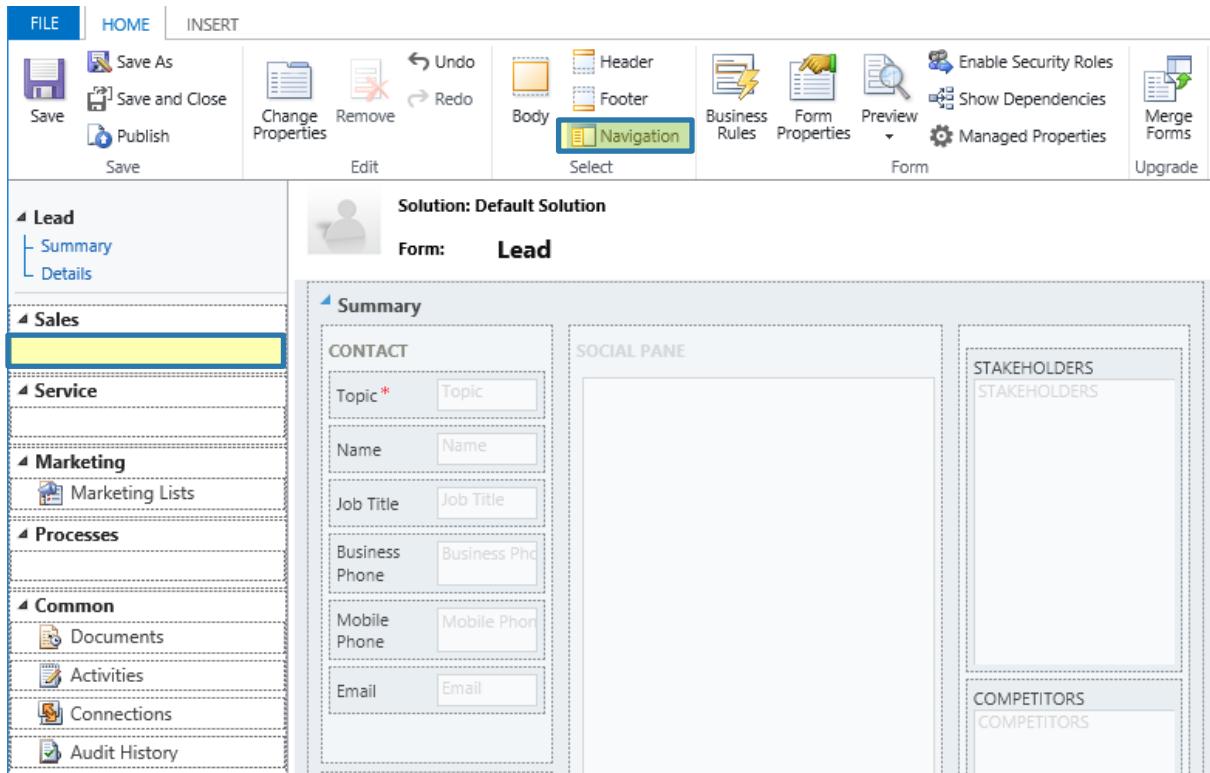


Figure 64: Customize the ActivityTools preview

Now switch to the *Insert*-tab and click on the **[Navigation Link]**-button.

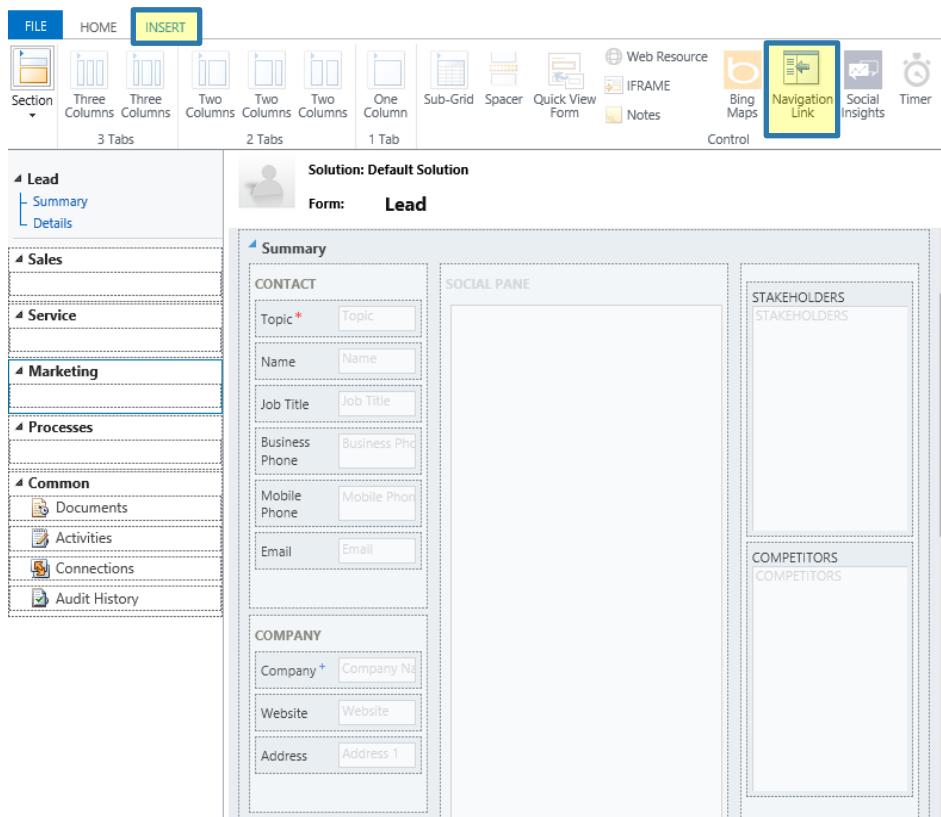


Figure 65: Open **[Navigation Link]**-button

The following dialog opens. Here you must select a name and an icon for your new label. Please insert *ptm_ActivityTools/MainPage.html* as web resource. Click on the **[OK]**-button to proceed.

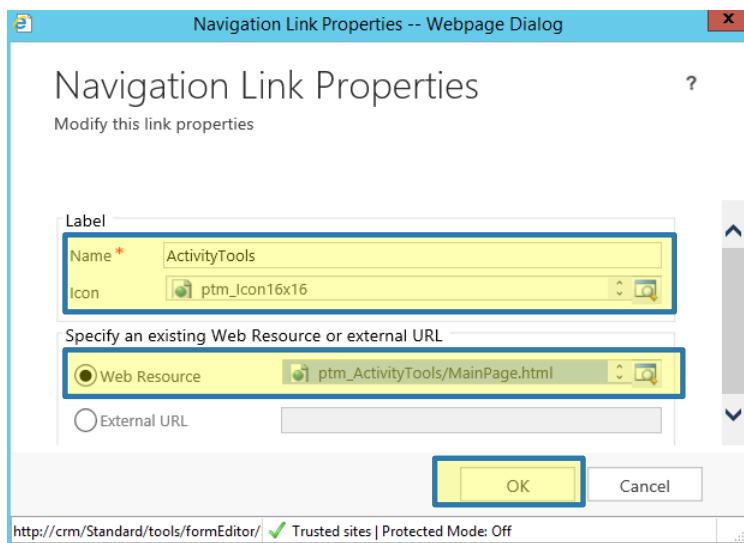


Figure 66: Navigation link properties – Webpage Dialog

To find the perfect icon, click on the *Magnifier* next to the *Icon*-field, scroll down and click on *Look Up More Records*. In the *Look Up Record*-window that opens next search for *ptm_Icon* and choose your preferred size. The icons are available in the three sizes as shown in the figure below:

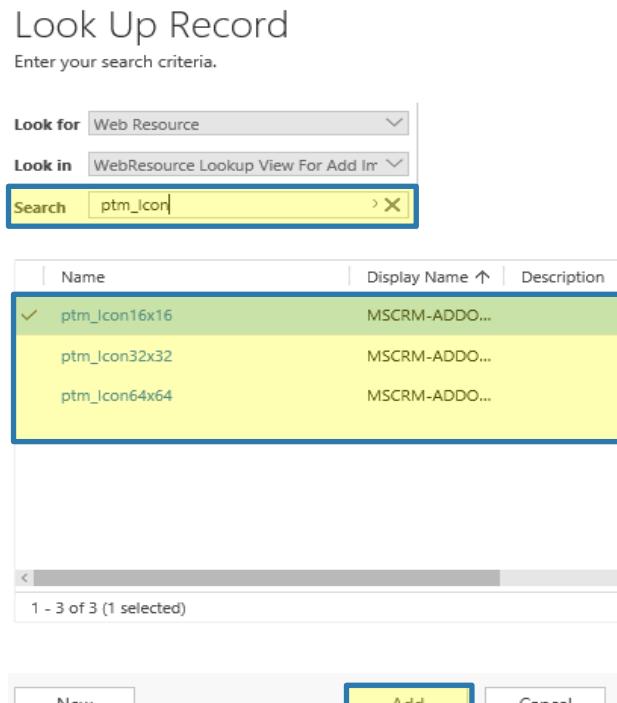


Figure 67: Look up record – Add icons

As shown in the screenshot below the new label has been added. In case you want to switch activity tools from one section to another one (for example, from *Sales* to *Marketing*) you do not have to repeat all the steps. Simply drag and drop the label to its future position in the menu.

Switch back to the *Home*-tab and click on the [**Save**]-button and thereafter click on the [**Publish**]-button.

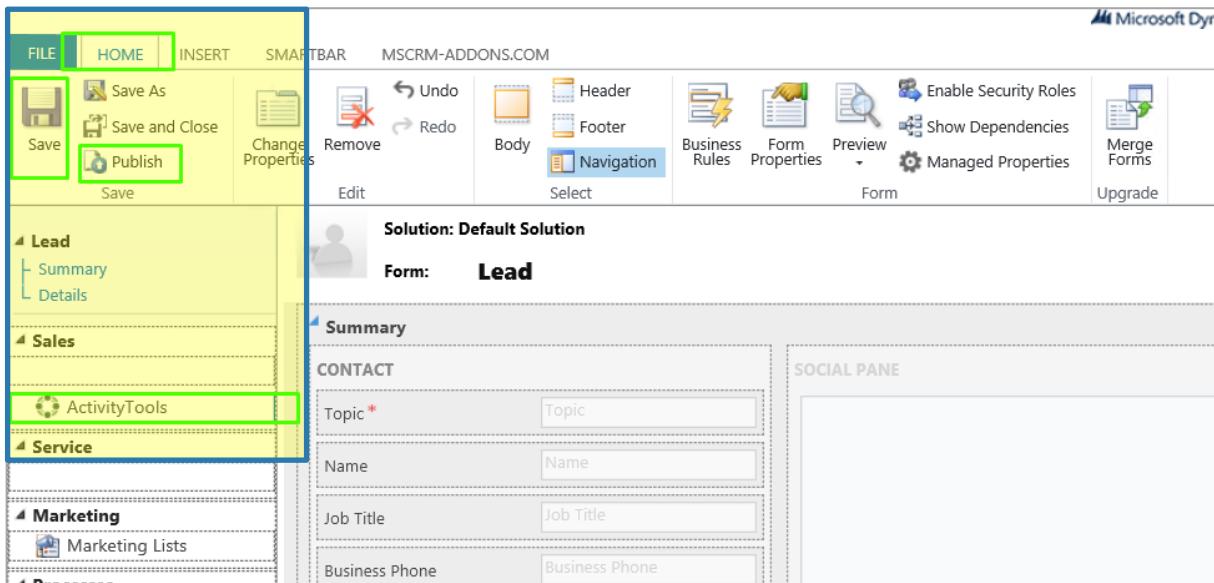


Figure 68: Save and publish settings

Return to your CRM main menu and refresh the page. By clicking on the drop-down button next to the lead in the NavigationBar you open the menu. There, you find the Activity Tools. In our example, you find it in the "Sales"-area.

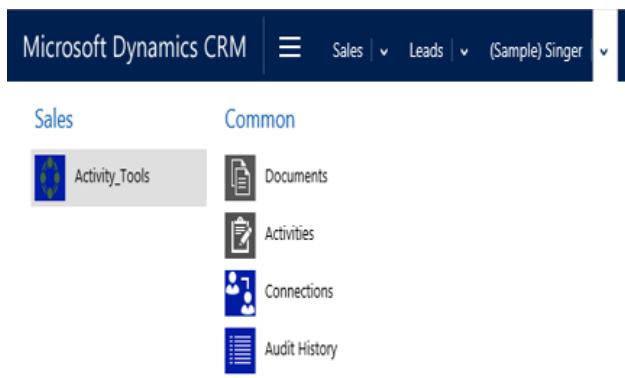


Figure 69: Result - Open ActivityTools

That's it! Simply click on the icon now and the ActivityTools Preview opens.

6.4 Embed ActivityTools in Dashboards – User related preview (MyActivities)

The ActivityTools previews can as well be embedded into a CRM dashboard. Depending on your configuration, it is possible to show one or multiple previews in one dashboard.

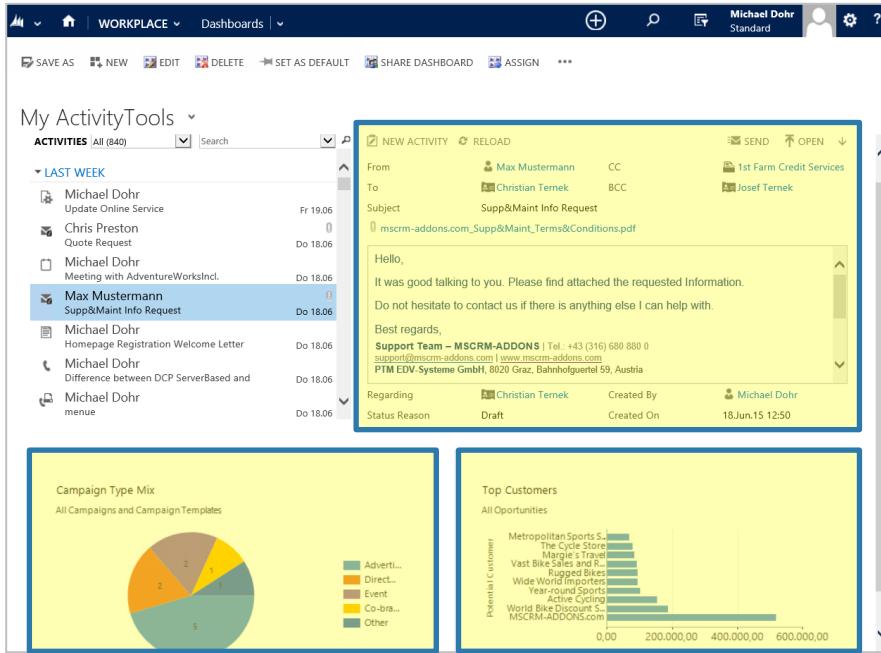


Figure 70: CRM custom dashboard with multiple previews

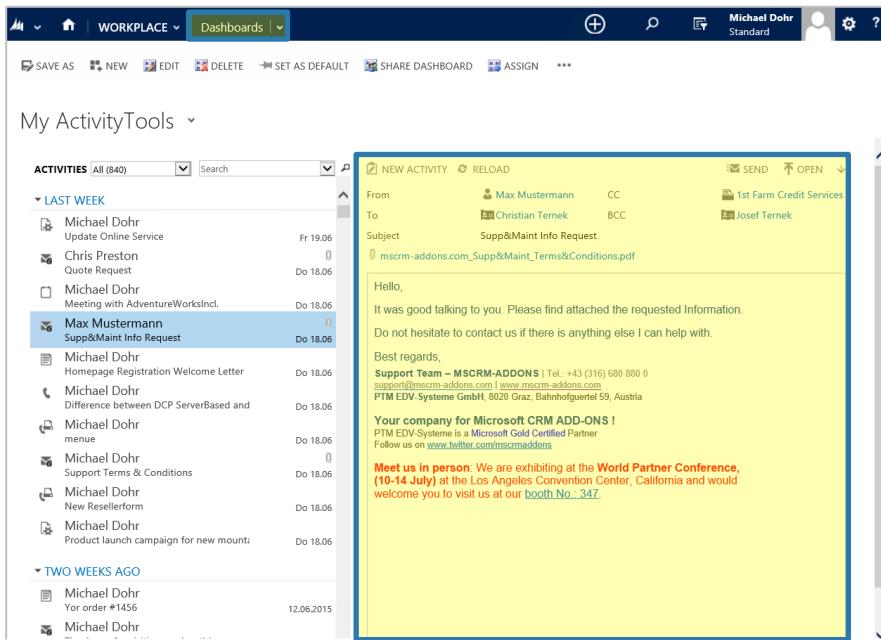


Figure 71: CRM custom dashboard with only one preview

6.4.1 How to embed ActivityTools in Dashboards

ActivityTools for MS Dynamics CRM 2015/2016 and Dynamics 365 can be embedded in any CRM-dashboard. To add Activity Tools to a CRM-Dashboard, please open your CRM-system, navigate to *Sales* and click on *dashboard*. In case you would like to create a new custom dashboard, click on the **[New]-button** in the command bar. If you want to edit an existing one, select an existing dashboard and click on the **[Edit]-button**. We will focus on how to create a new *dashboard*.



Figure 72: Command bar

Select the layout that suits you most and click on the **[Create]-button** to continue.

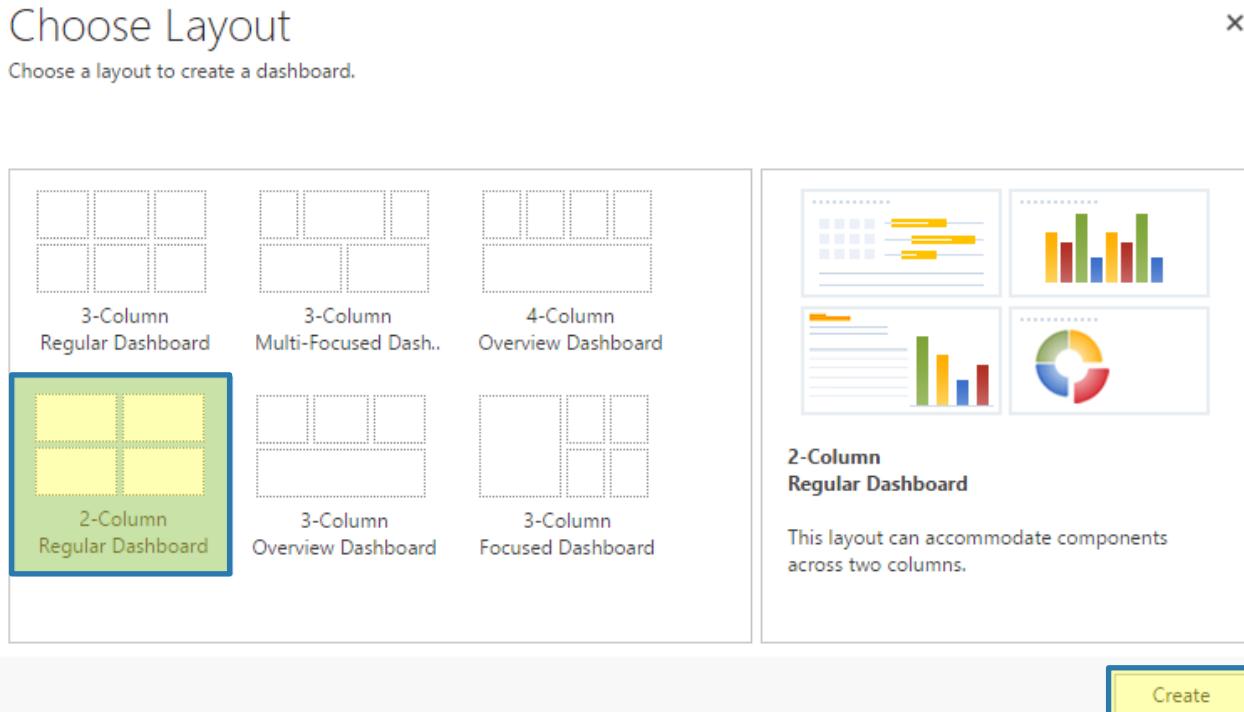


Figure 73: Select new dashboard

Hereafter, click on the **[Web Resource]**-button in the command bar or on the *web resource icon* in the open grid window.



Figure 74: Web resource icon in open grid

In the Web resource dialog, click on the *Magnifier* next to the *Web resource*-field. Scroll down and click on *Look Up More Records*. Search for *ptm_ActivityTools/MainPage.html* and hit the **[Add]**-button.



Figure 75: Web resource dialog

Do not forget to select a name for your dashboard-preview, insert it into the *Name** field and click on the **[OK]**-button to add it.

ActivityTools for Microsoft Dynamics CRM 2015/2016 and Dynamics 365

ActivityTools has now been added to the dashboard. To modify the height and width use the scaling buttons in the command bar.

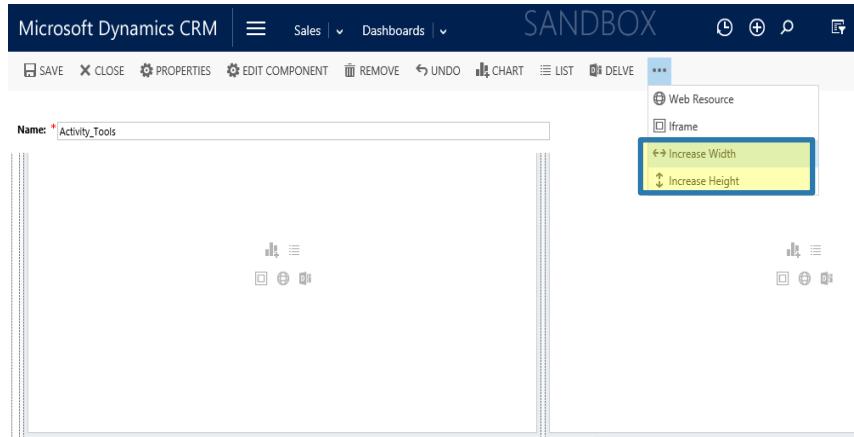


Figure 76: Scaling buttons in the command bar

Specify a dashboard name and do not forget to click the **[Save]**-button to save your settings.

A possible result could look like the following screenshot:

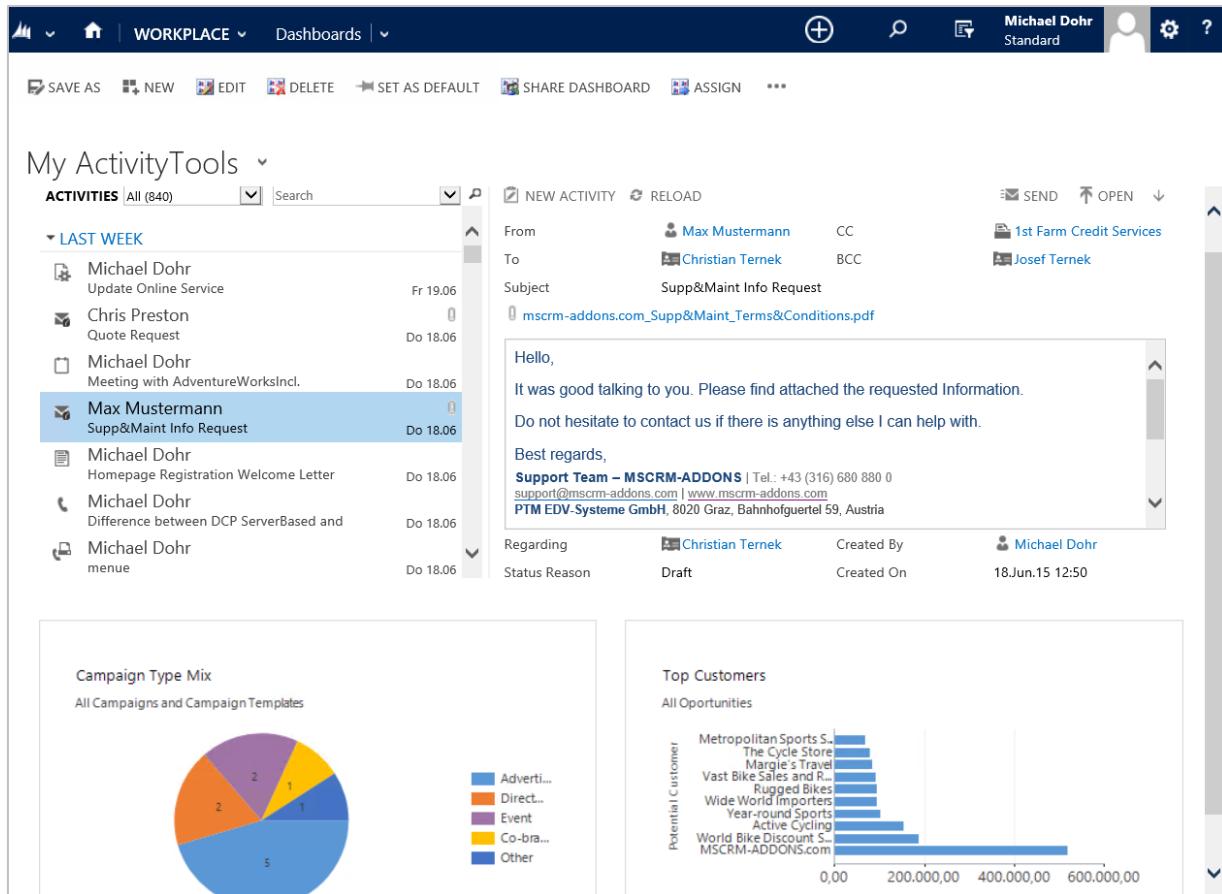


Figure 77: Result – Embedded ActivityTools in dashboards

6.5 Embed *MyActivities* in CRM NavigationBar (SiteMap) – User related preview (My Activities)

The user-related *MyActivities*-view can be embedded anywhere into CRM NavigationBar. This can be achieved via CRM SiteMap by using the XrmToolBox. For free download of the XrmToolBox, please click [here](#).

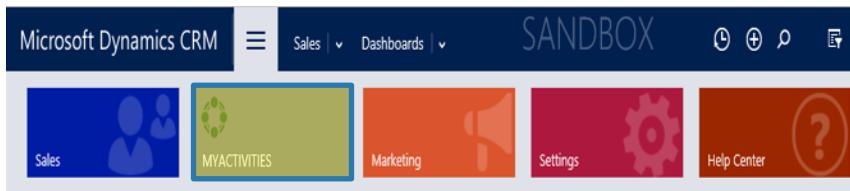


Figure 78: MyActivities in CRM SiteMap

6.5.1 How to embed ActivityTools in the CRM NavigationBar (SiteMap)

The first step towards an embedded ActivityTools-tab in CRM NavigationBar is to extract the XrmToolBox .zip file and run XrmToolBox.exe

Name	Änderungsdatum	Typ	Größe
Plugins	14.12.2015 08:27	Dateiordner	
McTools.StopAdvertisement.dll	15.12.2015 14:51	Anwendungserwe...	15 KB
McTools.Xrm.Connection.dll	15.12.2015 14:51	Anwendungserwe...	45 KB
McTools.Xrm.Connection.WinForms.dll	15.12.2015 14:51	Anwendungserwe...	77 KB
Microsoft.Crm.Sdk.Proxy.dll	15.12.2015 14:51	Anwendungserwe...	204 KB
Microsoft.Xrm.Client.dll	15.12.2015 14:51	Anwendungserwe...	285 KB
Microsoft.Xrm.Sdk.Deployment.dll	14.12.2015 08:27	Anwendungserwe...	87 KB
Microsoft.Xrm.Sdk.dll	15.12.2015 14:45	Anwendungserwe...	454 KB
mscrmtools2011.config	15.12.2015 14:53	CONFIG-Datei	1 KB
XrmToolBox	14.12.2015 08:27	Anwendung	392 KB
XrmToolBox.Extensibility.dll	15.12.2015 14:52	Anwendungserwe...	55 KB
XrmToolBox.Settings	15.12.2015 14:58	XML-Dokument	1 KB

Figure 79: Extraction of XrmToolBox .zip file

In the next window select the *SiteMap Editor* from the list.

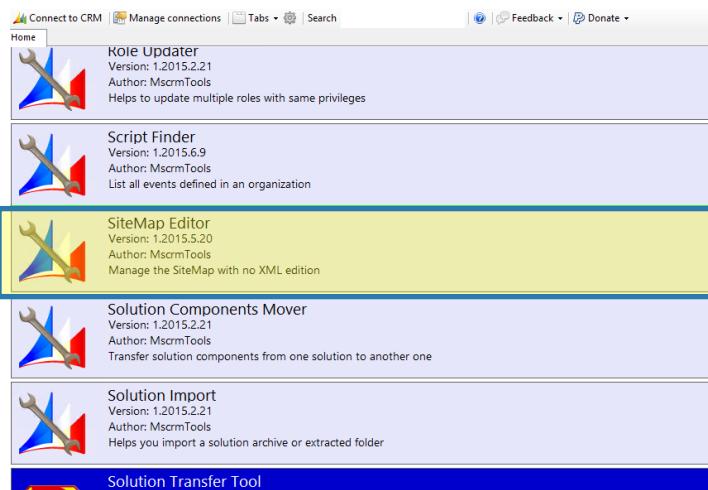


Figure 80: XrmToolBox for Microsoft Dynamics CRM

Click on the [Yes]-button when the following box appears:

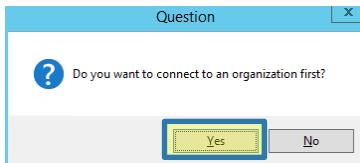


Figure 81: Question dialog

The connection should be displayed in the next window. If there is no connection displayed, please hit the [**New connection**]-button.

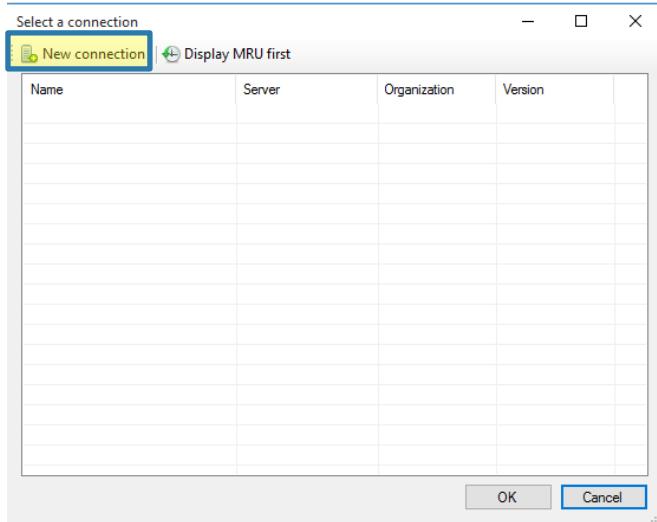


Figure 82: Connection Setup dialog

Please insert the required information to build up a connection to your CRM system in the connection dialog that opens now.

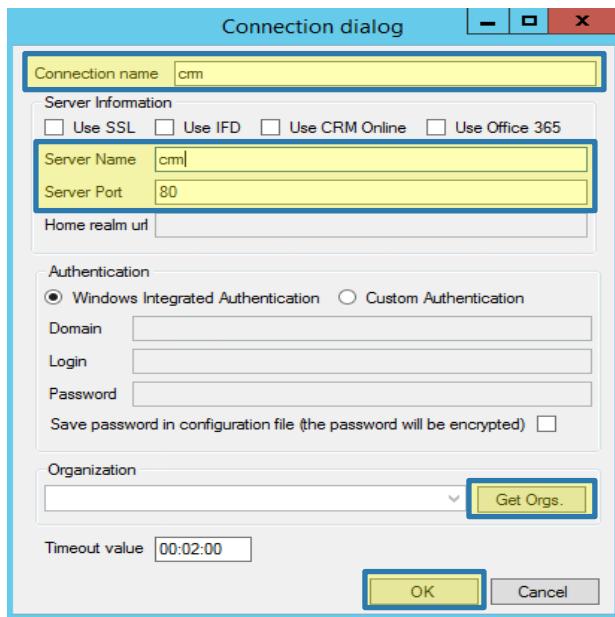


Figure 83: Connection dialog

Once you have entered all important information, click on the [**Get Orgs.**]-button to retrieve all available organizations and select your preferred one. Then click on the [**OK**]-button.

As soon as the connection is established, the SiteMap Editor appears. Click on the [**Load SiteMap**]-button.

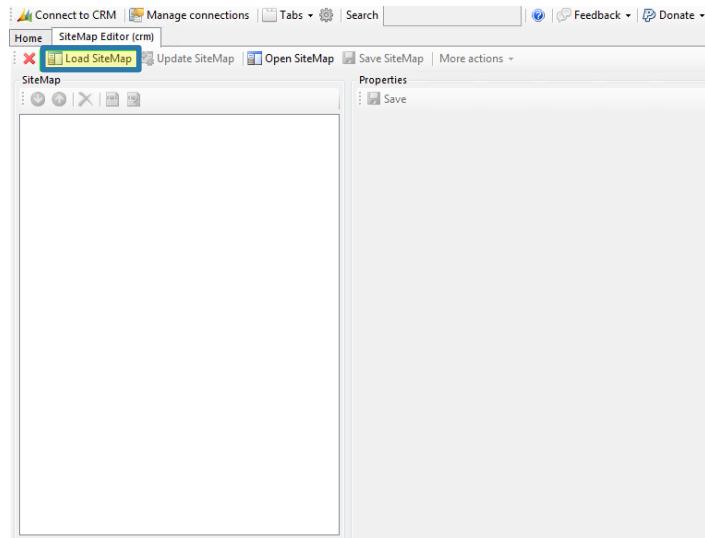


Figure 84: SiteMap Editor (CRM)

Please check an area where you want *MyActivities* to be displayed in the future and click on *Add SubArea*.

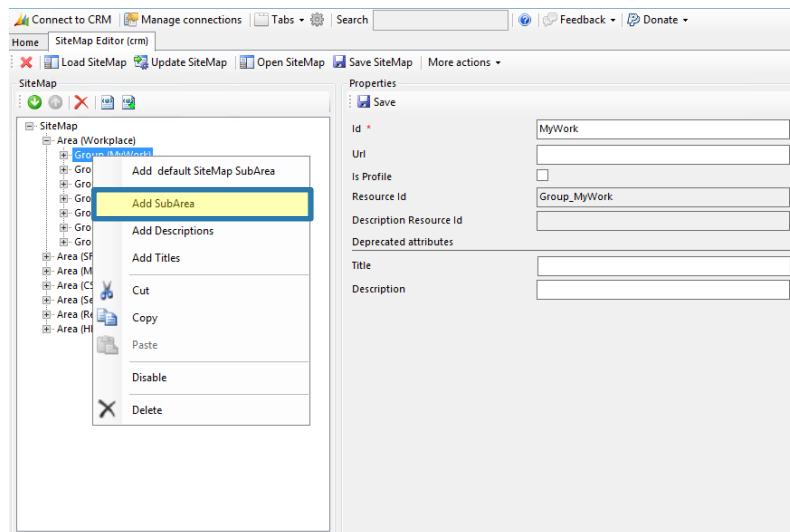


Figure 85: Add SubArea

Your tree-view should look like the one below. You can choose any Site Map Area you want. We decided to add *My activities* to *Group (My Work)*.

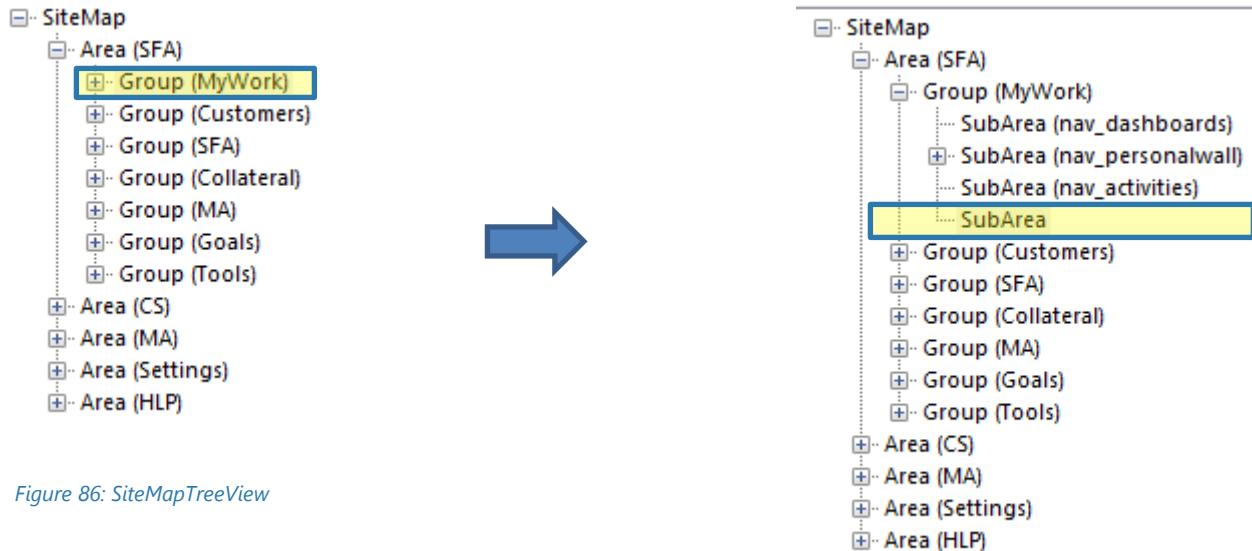


Figure 86: SiteMapTreeView

Please set the following properties for *Icon* and *Url* at the right side and click on the **[Save]**-button.

- *Icon*: \$WebResource:ptm_scheduler_icon_32x32.png
- *Url*: \$WebResource:ptm_ActivityTools/MainPage.html

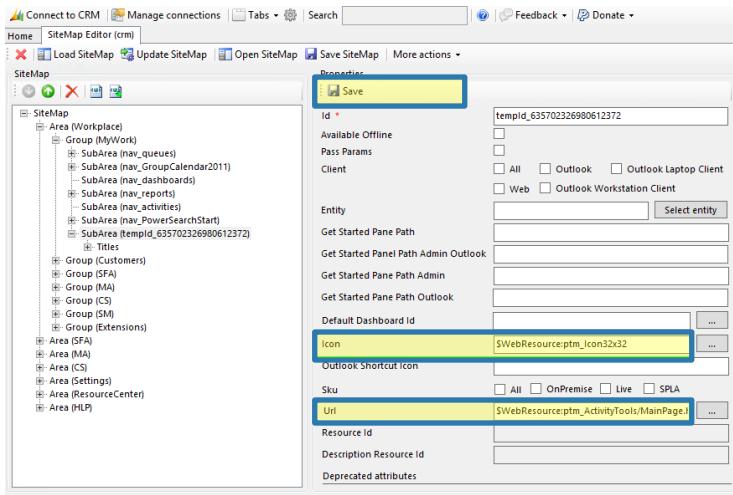


Figure 87: SiteMap Editor – Icon and Url

With a right click on the SubArea that you have created earlier, you open a new window. Click on *Add Titles* in this new window.

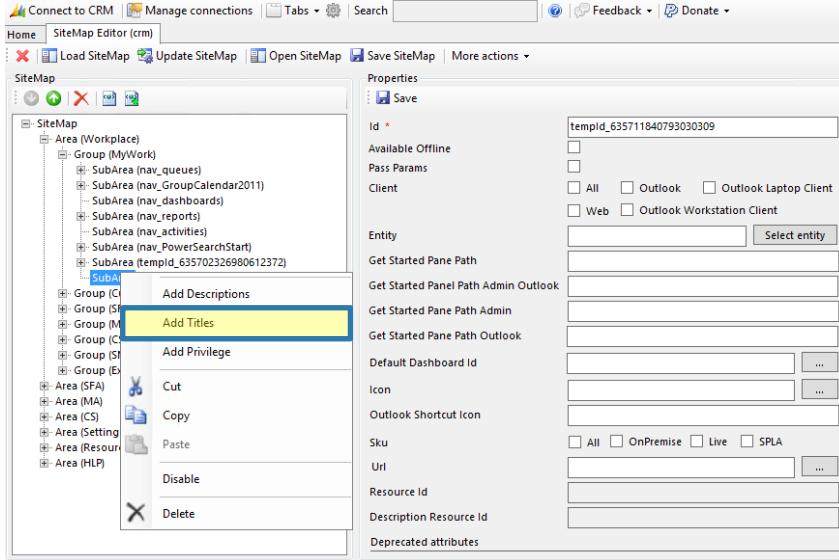


Figure 88: SiteMap Editor – Add Titles

In the following window please enter the appropriate *LCID** (e.g. 1033 for English or 1031 for German)

and *Title** (e.g. MyActivities) and click on the **[Save]**-button. Afterwards update your sitemap with a click on the **[Update SiteMap]**-button.

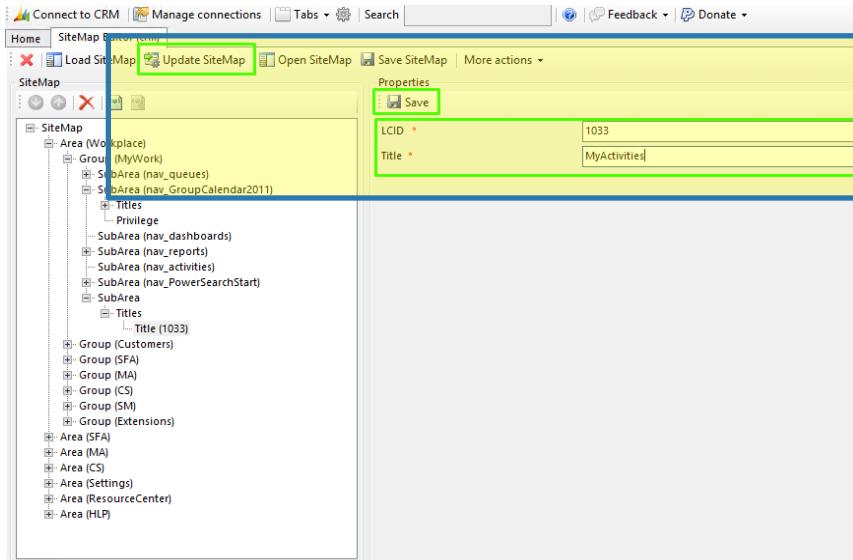


Figure 89: SiteMap Editor – Add Titles to

Now Save your SiteMap configuration, close the window and return to your CRM. Refresh the page. Your NavigationBar should look like this:

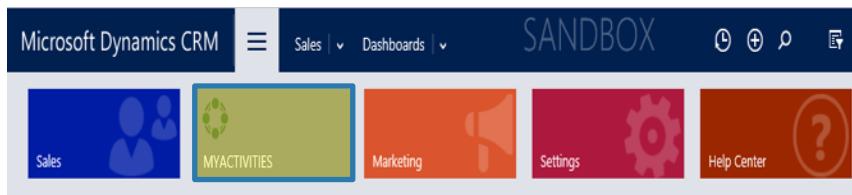


Figure 90: MyActivities in CRM SiteMap

Click on *MyActivites* to get an overview of your activities.

In case your CRM does not look like this, please restart your browser session.

If you have any questions, do not hesitate to contact our support-team. To guarantee quick processing, we kindly ask you to send us an email with an attached screenshot of the issue to support@mscrm-addons.com. Our support team is looking forward to providing you with answers and solutions.

7 How to use Activity Tools Layout Designer

The Layout Designer helps you to create, import, export or edit the preview of your Activity Tools Layout.



The ActivityTools Layout Designer only works with the ActivityTools version 2015.200 or higher.

6.1. How to start the Activity Tools Layout Designer

Open your Settings and then click on *Solutions*.

A screenshot of the Microsoft Dynamics CRM Settings page. At the top, there are four main navigation links: Sales (blue), Service (blue), Marketing (orange), and Settings (orange). The Settings link is highlighted with a blue border. Below these are three main sections: Business, Customization, and System. The Customization section contains a "Solutions" button, which is also highlighted with a blue border. The System section contains various configuration options like Administration, Security, and Data Management. The Business section contains options like Business Management, Templates, Product Catalog, and Service Management.

Figure 91: Settings > Solutions

The *All solutions*-window opens. Please double click on *ActivityToolsPluginCore*.

A screenshot of the Microsoft Dynamics CRM All Solutions window. The title bar shows "Microsoft Dynamics CRM" and "Settings | Solutions". The main area is titled "All Solutions" with a dropdown arrow. Below it is a toolbar with icons for New, Open, Save, Print, etc., and a "More Actions" dropdown. A table lists the solutions, with columns for Name, Display Name, Version, Installed On, and Package Type. The "ActivityToolsPluginCore" solution is listed at the bottom, highlighted with a green background and a checkmark icon. Its details are shown in the table row: Name is "ActivityToolsPluginCore", Display Name is "MSCRM-ADDONS.com Act...", Version is "2015.130", Installed On is "12/10/2015", and Package Type is "Managed".

Figure 92: ActivityTools – All Solutions

The *General Settings*-window opens. Click on the **[Open]**-button in the *Start Layout Designer* line to start the Layout Designer.

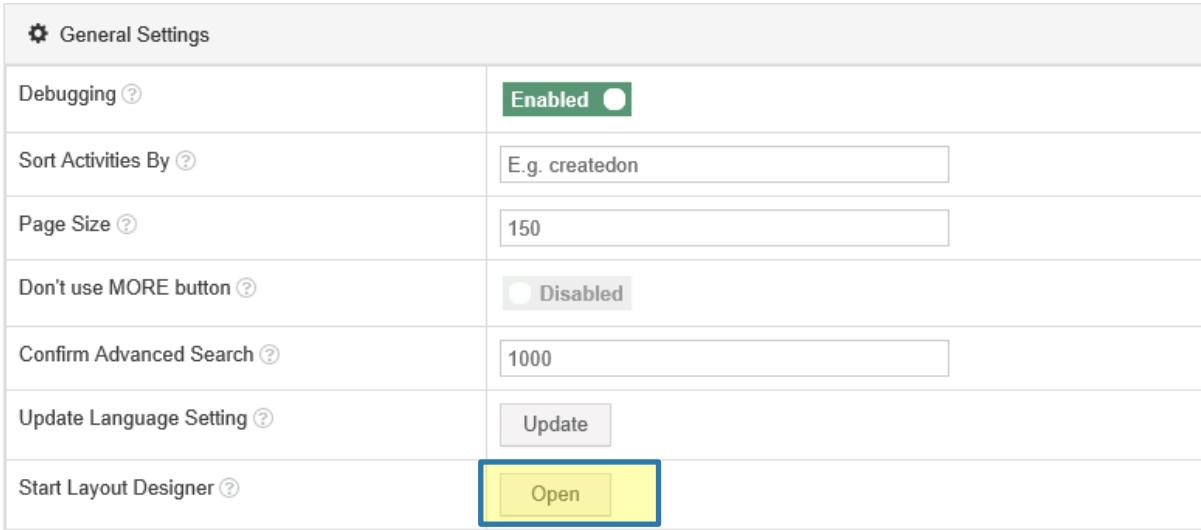


Figure 93: Start Layout Designer

The *Entity Layouts*-dialog opens. The dialog allows you to *create, import, export or edit* a layout in ActivityTools. To do so, check the default label and select the action you would like to take. For further information on this topic, have a look at our tutorials, starting with chapter [10.1 How to EDIT/DELETE EXISTING LAYOUT ON PAGE 79](#).

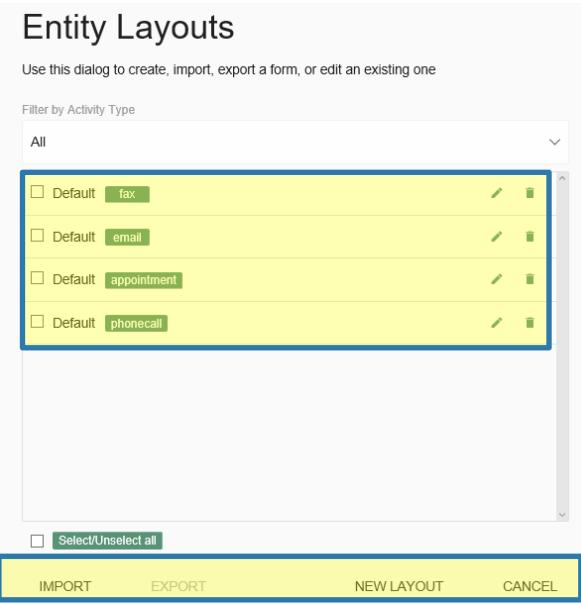


Figure 94: Entity Layouts dialog

7.1 The ActivityTools Layout Designer

Before you add a layout, we want you to have a brief overview of the Layout Designer's customization capabilities.

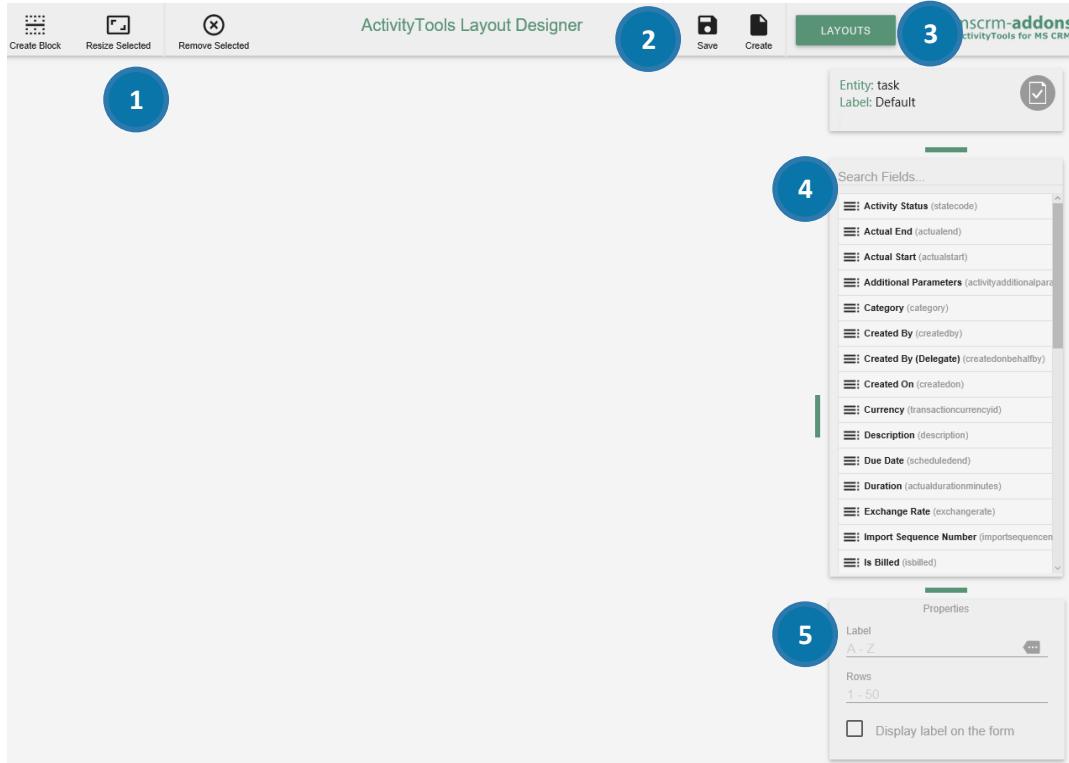


Figure 95: Layout Designer customization

① CREATE BLOCK

A layout usually consists of various blocks, which can be split in up to three columns. By customizing these blocks and columns you can create your personal layout, which could look like the example below:

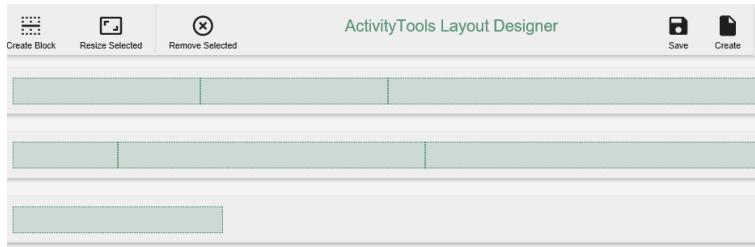


Figure 96: Columns and blocks

To create, resize or remove blocks, columns and fields use the following icons:



Figure 97: Customize blocks buttons

Click on the **[Create Block]**-button and a new window opens. You can create your block here by customizing its columns.

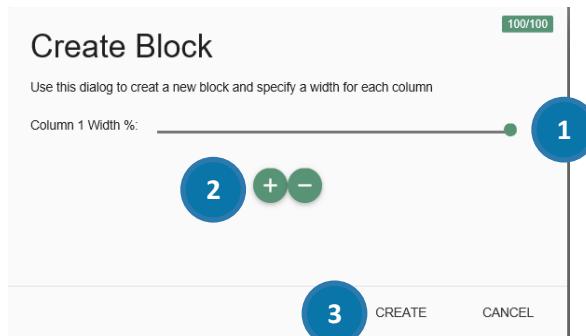


Figure 98: Create block functionalities

- ① Move the slider to determine which width you prefer for each column:
- ② Add or remove fields
- ③ Create a block or cancel

**PLEASE
NOTE**

The overall percentage maximum for a block is 100 percent!

The field *attachment* in the layout *email* cannot be customized.

The default setting for the field *description* is 0, which means that it stretches automatically over the whole block.

A possible result of three blocks with one to three fields could look like this:

The screenshot shows the ActivityTools Layout Designer interface. At the top, there are buttons for 'Create Block', 'Resize Selected', 'Remove Selected', 'Save', and 'Create'. The main area displays three horizontal blocks. The first block has three columns. The second block has two columns, with the left column being wider. The third block has one column.

Figure 99: Blocks: Result

② THE [SAVE]- & THE [CREATE]-BUTTON

Make sure that you save your changes as soon as possible with a click on the **[Save]**-button in the right upper corner.

The **[Create]**-button in the right upper corner is a quick way to get to the *New Layout dialog*. The dialog supports you when it comes to the creation of new buttons.

③ THE [LAYOUTS]-BUTTON

The green **[Layouts]**-button in the right upper corner opens the *Entity Layouts Dialog*, while the *Entity* and *Label* overview shows you which entity you are working on at the moment.



Figure 100: Entity and Label Overview

④ THE SEARCH FIELDS

In the *Search Fields*-section you can choose which fields you want to add to which column. Simply drag and drop your preferred field from the *Search Fields*-section to the column you would like to place it.

⑤ THE ACTIVITYTOOLS LAYOUT DESIGNER PROPERTIES

In the Properties of the ActivityTools Layout Designer, you can edit your field labels in any activated CRM language. Learn how to do so in our tutorial in chapter [10.3 HOW TO ON PAGE 82](#).

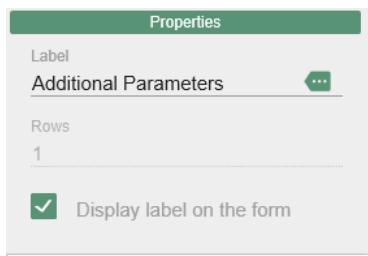


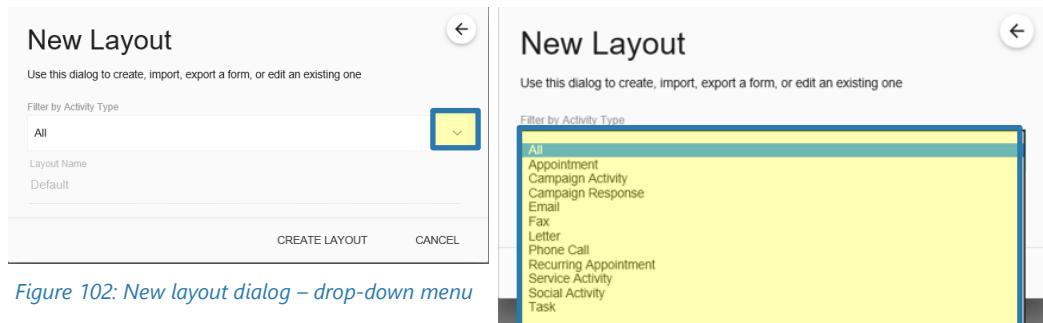
Figure 101: ActivityTools Layout Designer Properties

7.2 How to add new Layouts

The ActivityTools Layout Designer can provide you with new layouts. Learn how to add new layouts in the course of this chapter.

7.2.1 Open the Entity Layouts dialog

Now click on the **[New Layout]**-button on the bottom of the dialog. A new window opens. One click on the downward arrow will open a drop-down menu.



In this menu, you can choose which new layout you would like to add to the default ones.



If a layout is already set, the program will not allow to add it again.

You cannot add any self-created layouts, because they are imported from the default settings in CRM.

When you have selected a layout, click on the **[Create Layout]**-button to add this new layout to the default ones. In our example, we decided to go for the activity type *task*:



Figure 103: Create new layout

As soon as you click on the **[Create Layout]**-button, you are redirected to the ActivityTools Layout Designer surface, where you can customize your new layout.

8 How to activate debugging for ActivityTools

To activate debugging for ActivityTools open CRM and navigate to *Settings > Solutions*

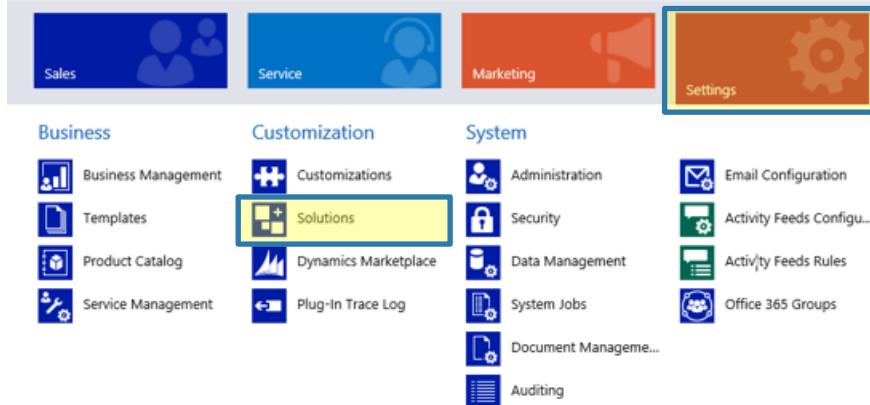


Figure 104: Navigate to *Settings > Solutions*

In the *All Solutions* overview, search for *ActivityToolsPluginCore* and open the solution with a double-click on it. If the solution is not displayed in the window, you can search for it by using the *Search*-function on the right side of the screen.

The screenshot shows the 'All Solutions' page in Microsoft Dynamics CRM. At the top, there is a navigation bar with the CRM logo, a settings icon, and a solutions icon. Below the navigation bar, the title 'All Solutions' is displayed with a dropdown arrow. A toolbar with various icons follows. The main area is a table listing solutions. The columns are: Name, Display Name, Version, Installed On, and Package Type. There are five rows in the table. The last row, which contains the solution 'ActivityToolsPluginCore', is highlighted with a green background and has a checkmark icon on its left. The other four rows show standard managed solutions from MSCRM-ADDONS.com.

Name	Display Name	Version	Installed On	Package Type
DocumentsCorePackServer...	MSCRM-ADDONS.com Do...	2015.1	12/10/2015	Managed
DocumentsCorePackServer...	MSCRM-ADDONS.com Do...	1.0	12/10/2015	Managed
ActivityToolsPluginDemo	ActivityToolsPluginDemo	2015.2	12/10/2015	Managed
ActivityToolsPluginConfig	ActivityToolsPluginConfig	2015.2	12/10/2015	Managed
✓ ActivityToolsPluginCore	MSCRM-ADDONS.com Act...	2015.130	12/10/2015	Managed

Figure 105: All solutions overview

With a double click on *ActivityToolsPluginCore* you will open the ActivityTools Settings.

Select the *General Settings*-tab and enable debugging by clicking on the **[Disabled]**-button.

The screenshot shows two versions of the 'General Settings' configuration page. The top version has a 'Debugging' button labeled 'Disabled'. The bottom version shows the same page after the 'Enabled' radio button has been selected, with the 'Enabled' button now highlighted.

Figure 106: General Settings tab

As soon as Debugging is enabled, press click on the [Save Configuration]-button.

The next step consists of getting access to the log files. The log files are stored in the *MSCRM-ADDONS.com Debug*-entity. The easiest way to access it, is by using the *Advanced Find* in the NavigationBar. Click on the **[Advanced Find]**-button in order to open the *Advanced Find*.



Figure 107: Advanced Find

Now select the *MSCRM-ADDONS.com Debug* entity and include the following condition: *Name must Contains PTMActivityTools*. Then click on the **[Edit Columns]**-button.

The screenshot shows the 'Advanced Find' interface in Microsoft Dynamics CRM. The 'Look for:' field contains 'MSCRM-ADDONS.com Debug'. The search criteria below it are: 'Name' dropdown set to 'Contains', and the value 'PTMActivityTools' entered into the text input field. The 'Edit Columns' button in the toolbar is highlighted with a blue box.

Figure 108: MSCRM-ADDONS.com Debug

The following window opens:

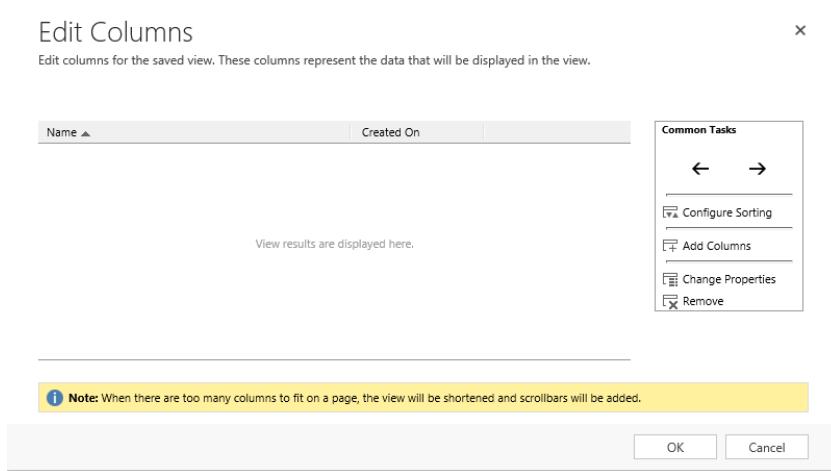


Figure 109: MSCRM-ADDONS.com Debug: Edit columns

Click on the **[Add Columns]**-button. Next, check the *ptm_message*-field and click on the **[OK]**-button to continue.

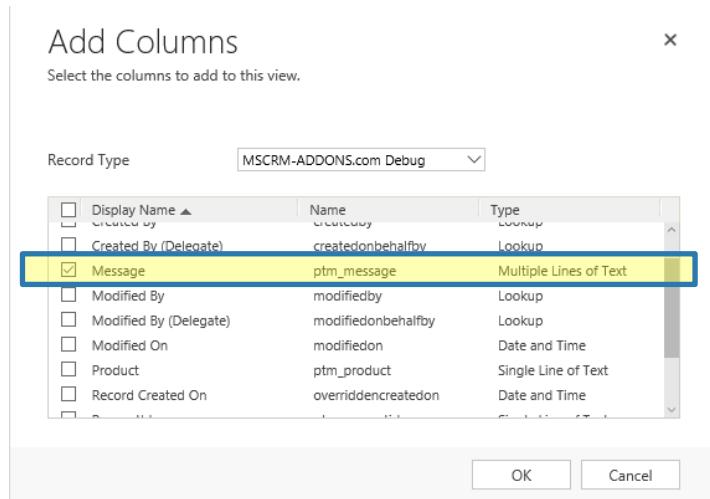


Figure 110: MSCRM-ADDONS.com Debug: Add columns

The column *Message* has been added:

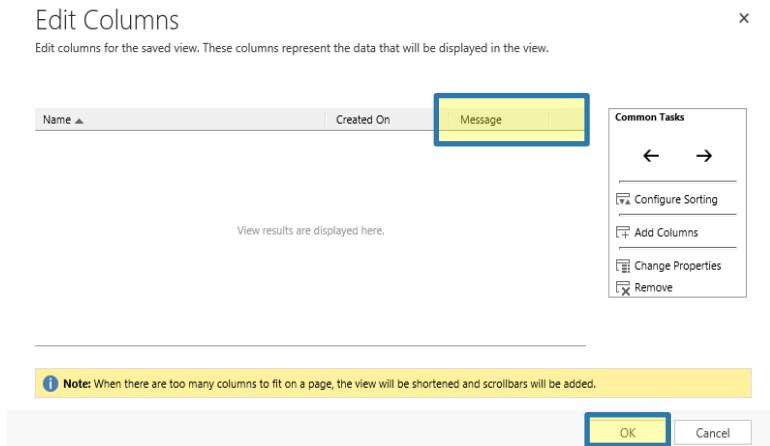


Figure 111: MSCRM-ADDONS.com Debug: Message-field added

Click on the **[OK]**-button in order to return to the main menu. Next, click on the **[Results]**-button.

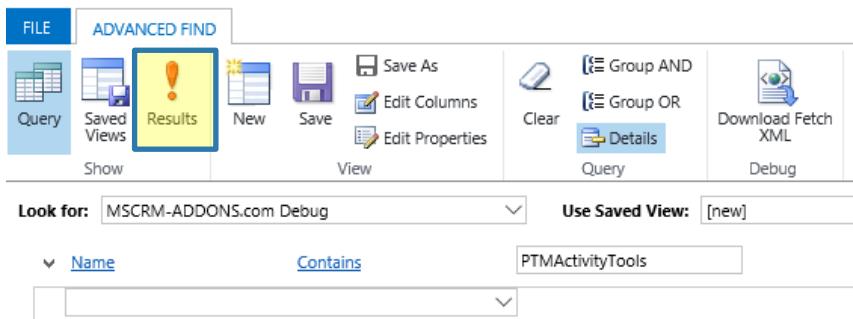


Figure 112: Advanced Find – Retrieve Results

The next step consists of deleting all the retrieved debug records. To ensure that you only have the latest and most relevant log files, you can filter the debug file by the *Created On*-field. Then reproduce the error and refresh the result list of this Advanced Find.

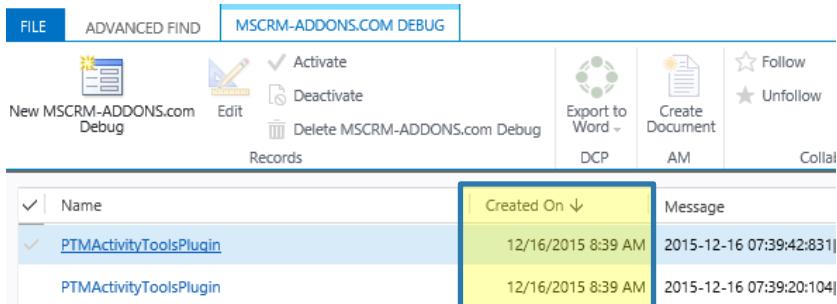


Figure 113: Advanced Find – Results filtered by Created On-field

Now select all relevant records and open the drop-down menu next to the [**Export MSCRM-ADDONS.com Debug**]-button in the Command bar.

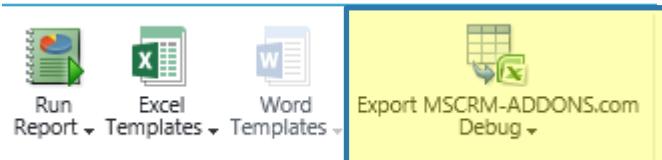


Figure 114: [Export MSCRM-ADDONS.com Debug]-button

Click on *Static Worksheet (Page only)*.

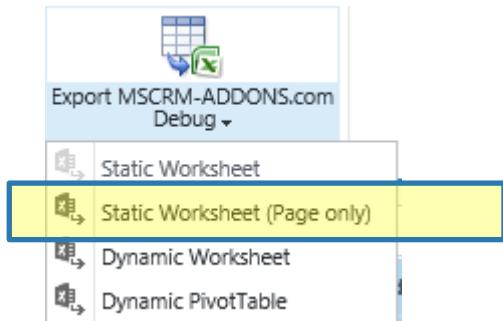


Figure 115: Static Worksheet (Page only)

Please save the log files on your computer. To guarantee quick processing, we kindly ask you to send us an email with a short error description and the attached log-files to support@mscrm-addons.com. Our support team is looking forward to providing you with answers and solutions.

9 How to uninstall ActivityTools

Sometimes it can be necessary to uninstall ActivityTools. To do so, please select *Programs and Features* in the Control Panel.

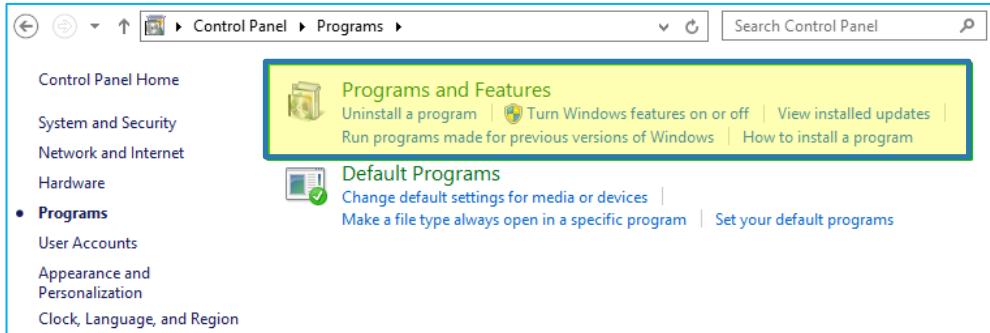


Figure 116: Programs and Features

Now search for *ActivityTools for MS CRM 2015/2016* in the *Uninstall or change a program* section to uninstall ActivityTools. Follow the instructions to uninstall the add-on as shown below:

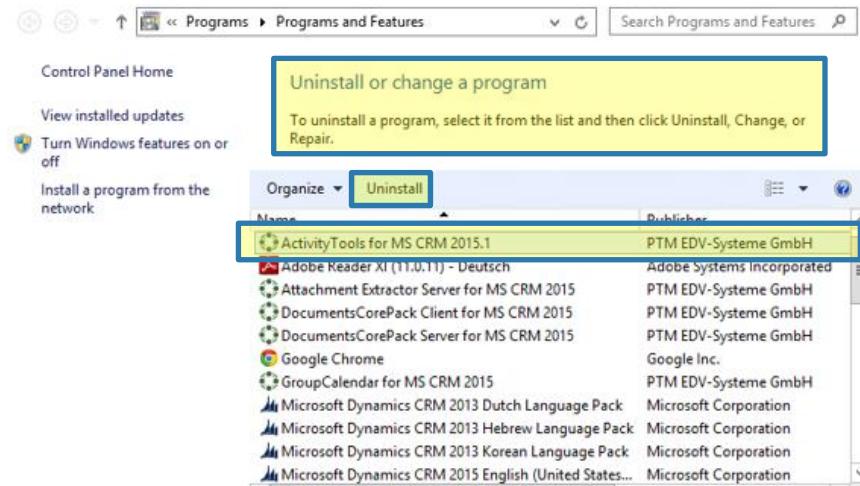


Figure 117: Uninstall or change a program

In the next dialog, click on the **[Yes]**-button to uninstall ActivityTools for MS CRM.

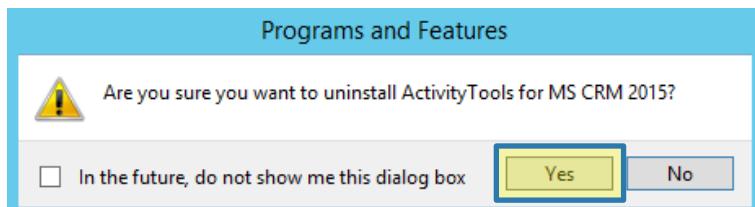


Figure 118: Uninstall or change a program

10 Tutorials (“How To’s”)

This chapter provides you with helpful tutorials that show you how to work with ActivityTools efficiently.

10.1 How to edit/delete existing layouts

To edit an existing form, open the ActivityTools entity layouts window.

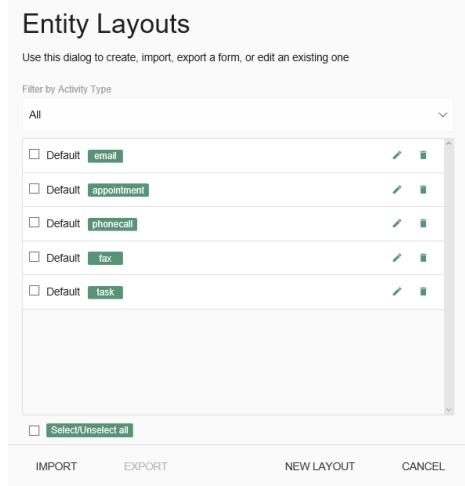


Figure 119: Entity Layout window

Next to the different layouts you find two buttons:



Figure 120: Pencil & garbage bin - button

Click on the [**Pencil**]-button to edit a certain layout and on the [**Garbage bin**]-button to delete a layout.

10.2 How to customize fields

Preview fields can be added or deleted to customize your personal search.

10.2.1 How to add fields

For our example, we have already placed *Additional Parameters*, *Actual End*, *Currency*, *Import Sequence No* and *Due Date* by dragging and dropping the fields into the ActivityTools Layout Designer.

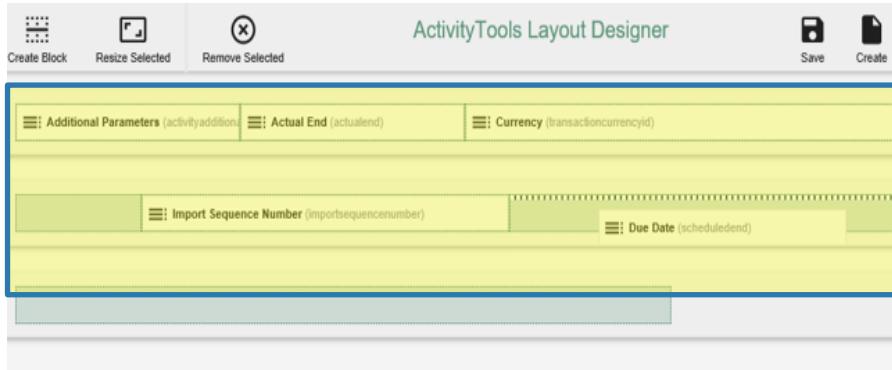


Figure 121: ActivityTools Layout Designer – drag & drop fields

As soon as we have added all necessary fields, we click on the **[Save]**-button. When we open our ActivityTools Preview window it looks like this:

The screenshot shows the ActivityTools Preview window titled 'MyActivityTools'. At the top, there are buttons for 'ACTIVITIES All (5)', 'Quick Search', 'NEW ACTIVITY', 'RELOAD', 'OPEN', 'CLOSE', and a refresh icon. On the left, there's a sidebar with sections for 'FUTURE ACTIVITIES' (showing a task for 'Alexandra' due on '12/31/2016') and 'LAST WEEK' and 'THREE WEEKS AGO'. On the right, a detailed view of the selected task is shown in a yellow-bordered box. The task details are: Additional Parameters, Actual End, Currency (Euro), Import Sequence Nbr, Due Date (12/31/2016 8:00 AM).

Figure 122: ActivityTools Preview with fields

All the fields we added to the columns are displayed in the ActivityTools preview. The look of your preview depends on which fields you have added and how you have customized them.

10.2.2 How to remove fields

Fields cannot only be added; they can also be removed.

To remove a field, select the field (1) and simply click on the [**Remove selected**]-button (2). Then press the [**Save**]-button (3). For demonstrating purposes, we remove the field *Due Date*.

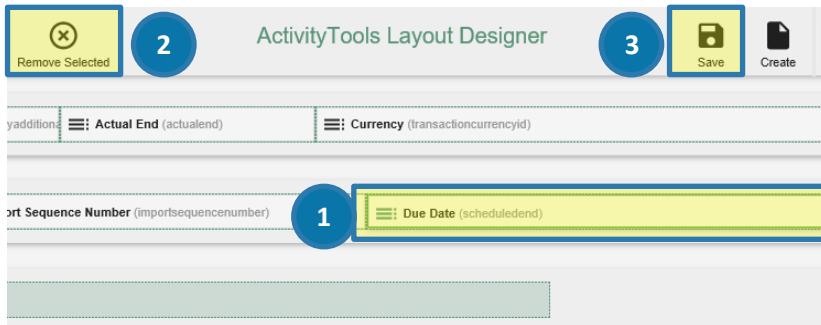


Figure 123: Remove preview field Due Date

Successfully removed, the field can be found in the *Search field*-section again.

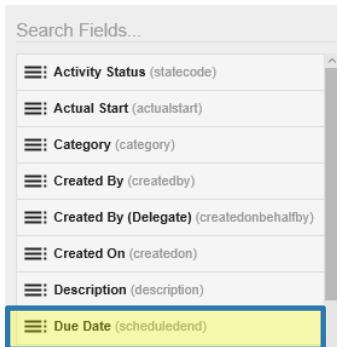


Figure 124: Search fields with Due Date-field

The field *Due date* is now also removed from the Activity Tools Preview.

MyActivityTools ▾

The screenshot shows the 'ActivityTools Preview' interface. On the left, there is a sidebar with 'ACTIVITIES All (5)', 'Quick Search', and filters for 'FUTURE ACTIVITIES' (showing 'Alexandra Test task' due on 12/31/2016), 'LAST WEEK', and 'THREE WEEKS AGO'. On the right, there are sections for 'NEW ACTIVITY' (with 'OPEN' and 'CLOSE' buttons), 'RELOAD', 'Additional Parameters' (set to 'Actual End'), 'Currency' (set to 'Euro'), and 'Import Sequence Num'.

Figure 125: ActivityTools Preview with fields (excluding the field Due Date)

10.3 How to change the field language

Especially when you work in a multilingual team, it can be helpful to change the language of fields.

To do so, click on the green **[More]**-button next to the label.



Figure 126: ActivityTools Layout Designer properties

The field labels window opens. As you can see, all available languages are listed in this overview.

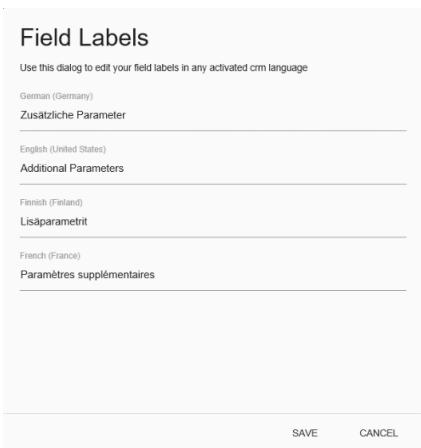


Figure 127: Field labels window

Click in the field you would like to rename (the language is highlighted in green now) and overwrite the existing term. Do not forget to press the **[Save]**-button to proceed properly.

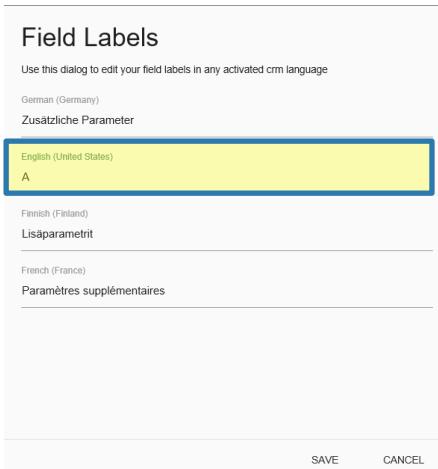


Figure 128: Field labels window: overwrite term



You can only change a field language if the language is also activated in your CRM settings. Besides, even though the fields were renamed, they keep their original functions!

Though the field name has changed, the original name of the field will be still displayed in brackets:

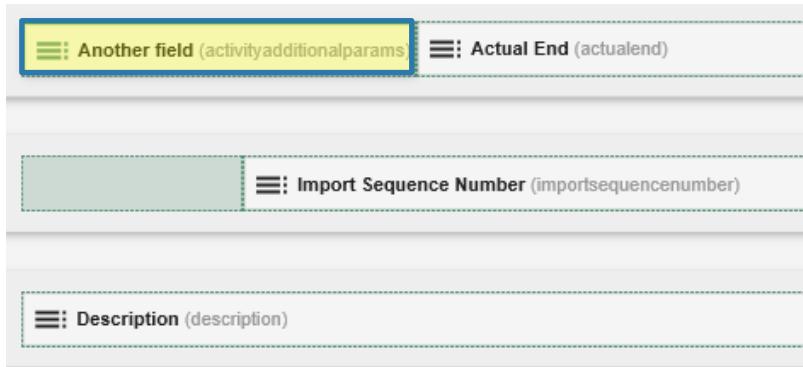


Figure 129: Field with changed name

The ActivityTools preview looks as well different now. As you can see, the field *Additional Parameters* has been renamed to *Another field*. If the field does not different, please refresh your browser with F5.

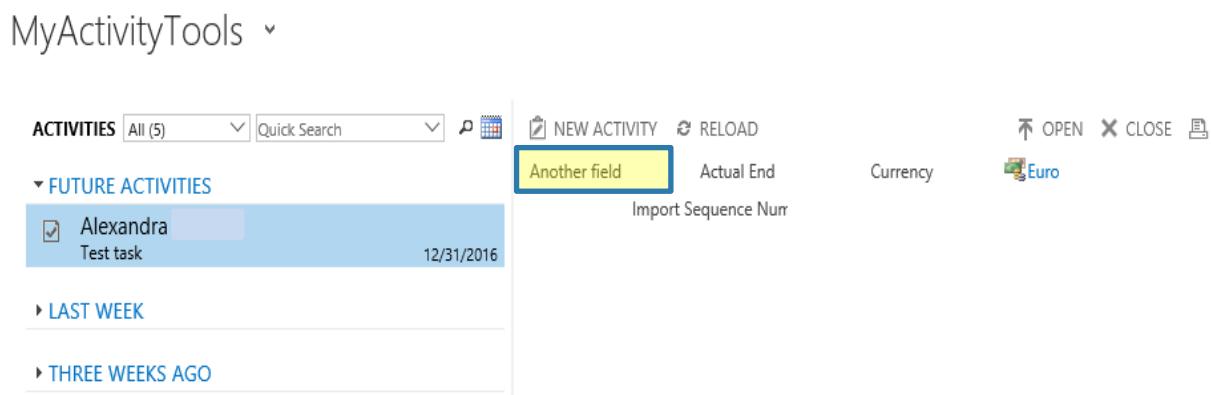


Figure 130: ActivityTools Preview with renamed field

10.4 How to export a Layout

If you want to export a layout to another system (for example from a test environment to a live environment) or in order to create a Backup file, you can export your layouts to .xml files.

In order to export a layout, please check the one you would like to export in the *Entity Layouts*-dialog (1) and press the **[Export]**-button (2). For demonstrating purposes, we export the default layout *Task*.

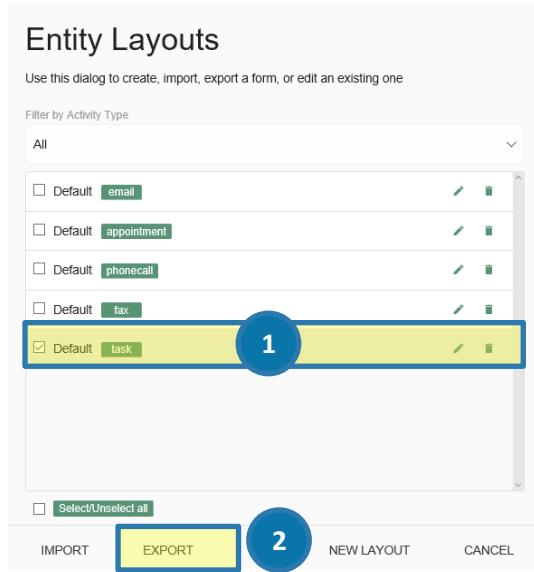


Figure 131: ActivityTools Preview with renamed field

Please save the so created file in a save location you remember. You might want to reimport it later again.

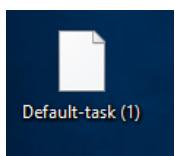


Figure 132: Default-task save location

10.5 How to import a Layout

Also, the import from, e.g. a Backup file, is very easy.

In order to import a file, please click on the **[Import]**-button in the *Entity Layouts*-dialog. A new window appears. Click on the **[Files]**-button and import the .xml-file (the layout) you would like to import:

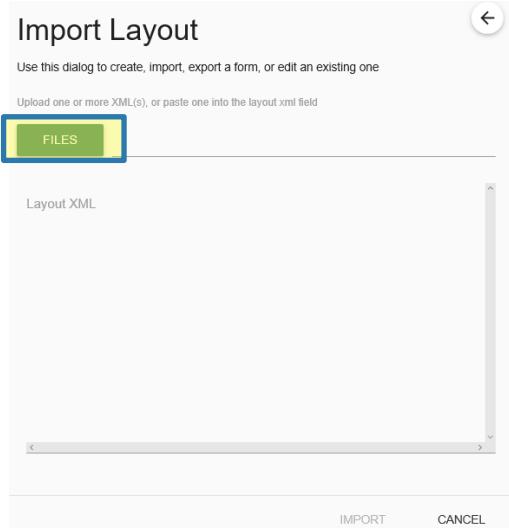


Figure 133: Import Layout

You are now provided with the XML Layout of the file you want to import. Click on the **[Import]**-button. If you import only a single layout, it will be opened immediately in the ActivityTools Layout Designer.

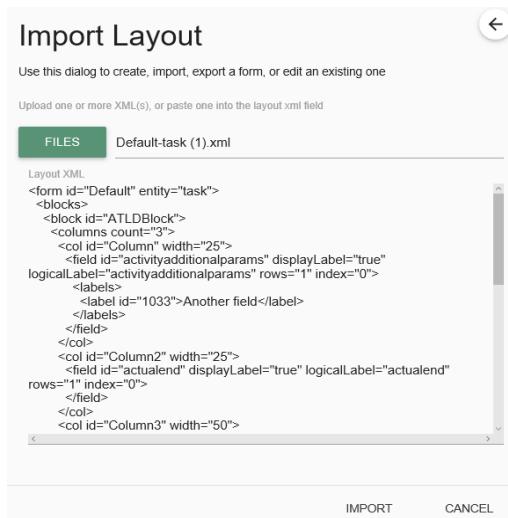


Figure 134: Import Layout .xml-file

11 List of figures

Figure 1: ActivityTools – Download .zip-file.....	6
Figure 2: AcitvityTools .exe installer.....	7
Figure 3: Installation dialog	7
Figure 4: EULA – End User License Agreement.....	8
Figure 5: Installation – Destination folder.....	8
Figure 6: ActivityTools installation finished.....	9
Figure 7: CRM Connection setup – Retrieve all Organizations	9
Figure 8: CRM Connection setup – select organization	10
Figure 9: InstallShield Wizard.....	10
Figure 10: Demo forms dialog.....	11
Figure 11: Install security roles for all users?	11
Figure 12: Complete the installation process	12
Figure 13: CRM Settings - Solutions.....	13
Figure 14: Import Solutions.....	13
Figure 15: Select Solution Package window.....	13
Figure 16: Select Solution Package window.....	14
Figure 17: Select Solution Package	15
Figure 18: Import Solution window	15
Figure 19: Import Solution window – installed solution message	15
Figure 20: Import Solution package – overwrite customizations.....	16
Figure 21: Import Customizations	16
Figure 22: Import solutions successful.....	17
Figure 23: Import solutions successful.....	18
Figure 24: ActivityTools demo contact.....	19
Figure 25: ActivityTools solution import result	19
Figure 26: Search field -start pane	21
Figure 27: CRM Connection Dialog.....	21
Figure 28: Organization overview.....	22
Figure 29: Organization overview – specific buttons	22
Figure 30: License Manager.....	23
Figure 31: Select license file	23
Figure 32: ActivityTools Configuration Page.....	24
Figure 33: ActivityTools Configuration Page – Getting Started tab.....	25
Figure 34: ActivityTools Configuration – General Settings tab	26
Figure 35: ActivityTools Debugging enabled for the last 24 hours	26
Figure 36: Status Filter Result.....	28
Figure 37: Content Search dialog	29
Figure 38: ActivityTools Configuration – Licensing tab	31
Figure 39: ActivityTools Install License dialog	31
Figure 40: ActivityTools Configuration – About tab	32
Figure 41: ActivityTools product settings.....	33

Figure 42: ATCCustomButtons settingskey	34
Figure 43: Custom button - Result.....	35
Figure 44: ATPluginFilter	37
Figure 45: ATPluginFilter Result.....	38
Figure 46: ATFormatGridItems.....	39
Figure 47: Result by using XML.....	40
Figure 48: Regular CRM Activity Section.....	42
Figure 49: Command bar: [Form]-button.....	42
Figure 50: Open form properties.....	43
Figure 51: Form properties window.....	43
Figure 52: ActivityTools Look-up window.....	44
Figure 53: Form properties	44
Figure 54: Handlerproperties.....	45
Figure 55: Arrange Social Pane.....	45
Figure 56: ActivityTools - Result.....	46
Figure 57: Command bar: [Form]-button.....	47
Figure 58: Open Web Resource	47
Figure 59: Add Web Resource	47
Figure 60: Arrange Social Pane.....	48
Figure 61: ActivityTools Webresource - Result.....	49
Figure 62: Open Lead	50
Figure 63: Open the form editor.....	50
Figure 64: Customize the ActivityTools preview	51
Figure 65: Open [Navigation Link]-button	52
Figure 66: Navigation link properties – Webpage Dialog	53
Figure 67: Look up record – Add icons.....	53
Figure 68: Save and publish settings.....	54
Figure 69: Result - Open ActivityTools.....	54
Figure 70: CRM custom dashboard with multiple previews	55
Figure 71: CRM custom dashboard with only one preview	55
Figure 72: Command bar.....	56
Figure 73: Select new dashboard.....	56
Figure 74: Web resource icon in open grid	57
Figure 75: Web resource dialog	57
Figure 76: Scaling buttons in the command bar	58
Figure 77: Result – Embedded ActivityTools in dashboards	58
Figure 78: MyActivities in CRM SiteMap	59
Figure 79: Extraction of XrmToolBox .zip file	60
Figure 80: XrmToolBox for Microsoft Dynamics CRM.....	60
Figure 81: Question dialog	60
Figure 82: Connection Setup dialog	61
Figure 83: Connection dialog.....	61
Figure 84: SiteMap Editor (CRM)	62

Figure 85: Add SubArea.....	62
Figure 86: SiteMapView.....	63
Figure 87: SiteMap Editor – Icon and Url settings.....	63
Figure 88: SiteMap Editor – Add Titles.....	64
Figure 89: SiteMap Editor – Add Titles to SubArea.....	64
Figure 90: MyActivities in CRM SiteMap	65
Figure 91: Settings > Solutions	66
Figure 92: ActivityTools – All Solutions.....	66
Figure 93: Start Layout Designer.....	67
Figure 94: Entity Layouts dialog.....	67
Figure 95: Layout Designer customization	68
Figure 96: Columns and blocks	68
Figure 97: Customize blocks buttons	69
Figure 98: Create block functionalities.....	70
Figure 99: Blocks: Result	70
Figure 100: Entity and Label Overview.....	71
Figure 101: ActivityTools Layout Designer Properties	71
Figure 102: New layout dialog – drop-down menu	72
Figure 103: Create new layout.....	72
Figure 104: Navigate to Settings > Solutions.....	73
Figure 105: All solutions overview.....	73
Figure 106: General Settings tab.....	74
Figure 107: Advanced Find	74
Figure 108: MSCRM-ADDONS.com Debug.....	74
Figure 109: MSCRM-ADDONS.com Debug: Edit columns	75
Figure 110: MSCRM-ADDONS.com Debug: Add columns.....	75
Figure 111: MSCRM-ADDONS.com Debug: Message-field added	76
Figure 112: Advanced Find – Retrieve Results.....	76
Figure 113: Advanced Find – Results filtered by Created On-field	76
Figure 114: [Export MSCRM-ADDONS.com Debug]-button	77
Figure 115: Static Worksheet (Page only)	77
Figure 116: Programs and Features.....	78
Figure 117: Uninstall or change a program.....	78
Figure 118: Uninstall or change a program.....	78
Figure 119: Entity Layout window	79
Figure 120: Pencil & garbage bin - button.....	79
Figure 121: ActivityTools Layout Designer – drag & drop fields.....	80
Figure 122: ActivityTools Preview with fields	80
Figure 123: Remove preview field Due Date.....	81
Figure 124: Search fields with Due Date-field	81
Figure 125: ActivityTools Preview with fields (excluding the field Due Date)	81
Figure 126: ActivityTools Layout Designer properties	82
Figure 127: Field labels window	82

ActivityTools for Microsoft Dynamics CRM 2015/2016 and Dynamics 365

Figure 128: Field labels window: overwrite term	82
Figure 129: Field with changed name	83
Figure 130: ActivityTools Preview with renamed field	83
Figure 131: ActivityTools Preview with renamed field	84
Figure 132: Default-task save location.....	84
Figure 133: Import Layout.....	85
Figure 134: Import Layout .xml-file.....	85

12 Contact

For further technical questions, please visit our blog <http://www.msrm-addons.com/Blog>

or contact support@msrm-addons.com.

For sales and licensing questions please contact office@msrm-addons.com, or the corresponding contact information below.



Headquarter – Europe

PTM EDV-Systeme GmbH

Bahnhofgürtel 59

A-8020 Graz

Austria

Tel Austria +43 316 680-880-0

Fax +43 316 680-880-25

Support:

7AM - 8PM GMT+1 (Monday-Friday)

Sales:

+43 316 680 880 14

sales@msrm-addons.com

www.ptm-edv.at

www.msrm-addons.com



Headquarter – US

mscrm-addons.com Corp

1860 North Rock Springs Rd

Atlanta, GA 30324

United States

Tel US +1 404 720 6066

Support:

9AM - 6PM EST (Monday-Friday)

Sales:

+1 404 720 6046

ussales@msrm-addons.com

www.msrm-addons.com