



# Activity Timeline for Microsoft Dynamics® CRM

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Version 3.1

Last Updated: December 2023

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# Overview

Dynamics CRM provides an activity pane which is an amazing placeholder to display all customer interactions in one place. But it has its own limitations, many times, we want the users to view activities but while adding we want to capture few more fields, for example, adding a custom follow-up field on the task of showcasing the activities in more interactive manner.

Soluzione's activity timeline is a vertical timeline view which enables you to see activities and notes in a single pane. We have provided different colors for different activity types which are eye-catching, and users are able to differentiate activities very easily. Being a web resource, we are able to customize the behavior and add additional fields.

The integration is available for Microsoft Dynamics CRM Online. Please contact us at [support@solz.it](mailto:support@solz.it) in case you need to install the same on an on-premise instance.

## Installing Activity Timeline Solution

The activity timeline solution trial can be obtained from Microsoft AppSource or you can contact the Soluzione team for the same at [support@solz.it](mailto:support@solz.it)

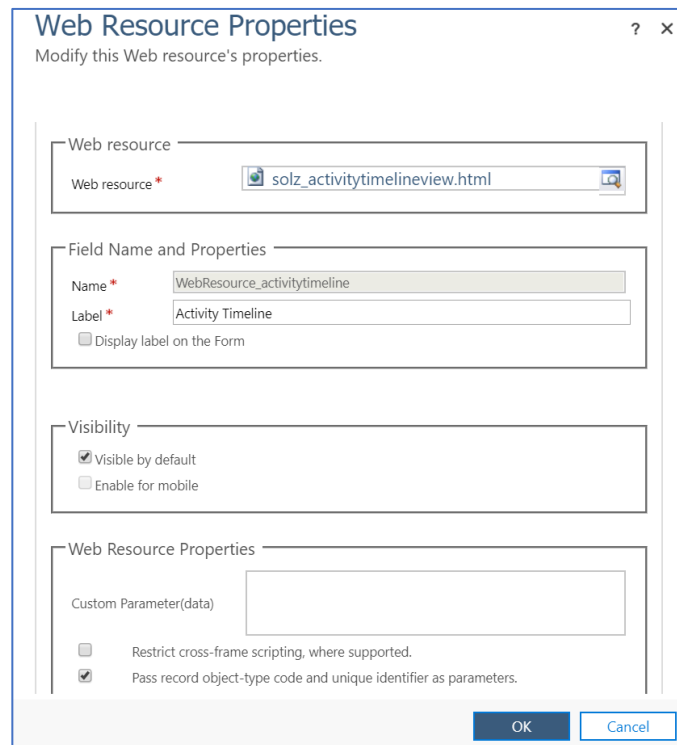
The solution can only be installed by Microsoft Dynamics CRM administrators or by users with administrative privileges for Microsoft Dynamics CRM.

Follow the guide CRM\_Addon\_Activation\_Guide.pdf to install and activate trial or paid subscription.

## How to Configure the Activity Timeline?

After the activity timeline solution is installed and activated follow the below steps to configure the activity timeline.



- **Step 1:** Go to the form where you want to place the activity timeline.
- **Step 2:** Open the form editor and insert the web-resource. Select the web resource "solz\_activitytimeline.html".
- **Step 3:** Uncheck the "Display label on the form".
- **Step 4:** Check the option to pass record object-type code and unique identifier as a parameter.
- **Step 5:** Go to the Formatting section and ensure that you give it around 20 rows of space and remove the border.
- **Step 6:** Save and publish the form. Remember you might need system customizer privileges to do the same.



**Web Resource Properties** ? x

Modify this Web resource's properties.

**Web resource**

Web resource \*  solz\_activitytimelineview.html 

**Field Name and Properties**

Name \* WebResource\_activitytimeline

Label \* Activity Timeline

☐ Display label on the Form

**Visibility**

☒ Visible by default

☐ Enable for mobile

**Web Resource Properties**

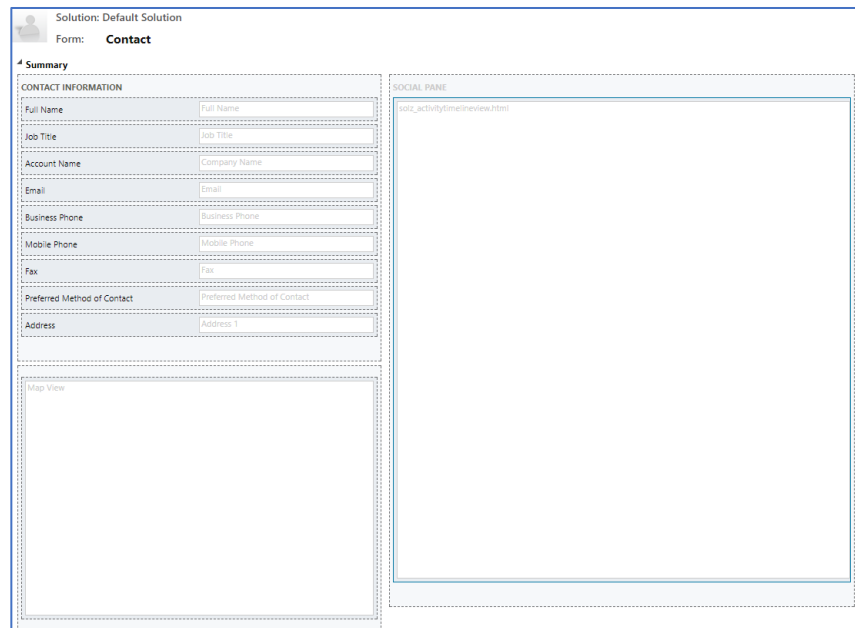
Custom Parameter(data)

☐ Restrict cross-frame scripting, where supported.

☒ Pass record object-type code and unique identifier as parameters.

OK Cancel

**Figure:** Insert Web Resource



Solution: Default Solution

Form: **Contact**

**Summary**

**CONTACT INFORMATION**

Full Name	Full Name
Job Title	Job Title
Account Name	Company Name
Email	Email
Business Phone	Business Phone
Mobile Phone	Mobile Phone
Fax	Fax
Preferred Method of Contact	Preferred Method of Contact
Address	Address 1

Map View

**SOCIAL PANE**

solz\_activitytimelineview.html

**Figure:** Activity Timeline web resource inserted in the form editor.

# Configure Security Roles

Two security roles are created when you install the Activity Timeline solution.

<input type="checkbox"/>	 Activity Timeline Admin	Activity Timeline Admin	Security Role
	 Activity Timeline Users	Activity Timeline Users	Security Role

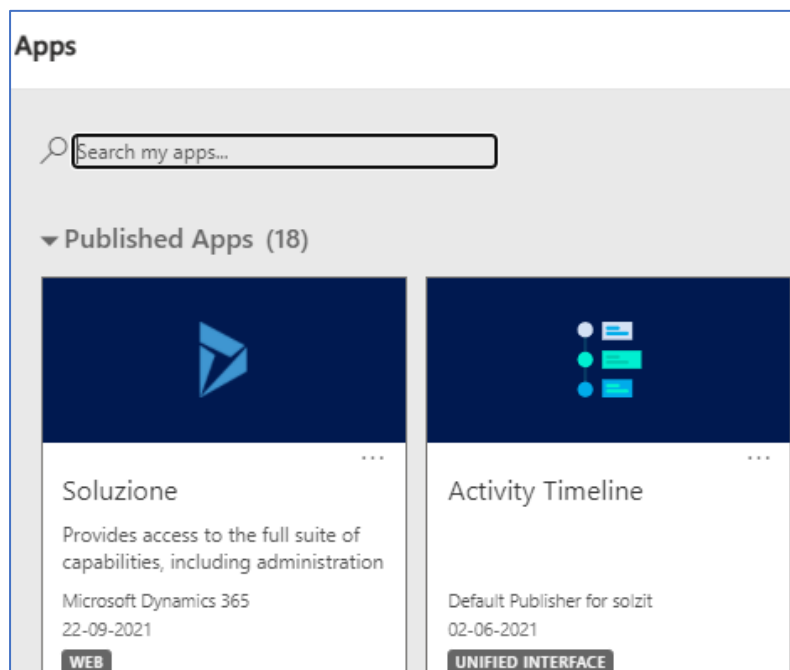
- **Activity Timeline Users:** Users belonging to this role will be normal users who use Activity Timeline CRM Addon.
- **Activity Timeline Admin:** In addition to the User's role the admin role can manage the add-on subscription record.

As an admin, you need to assign required users to the security roles.

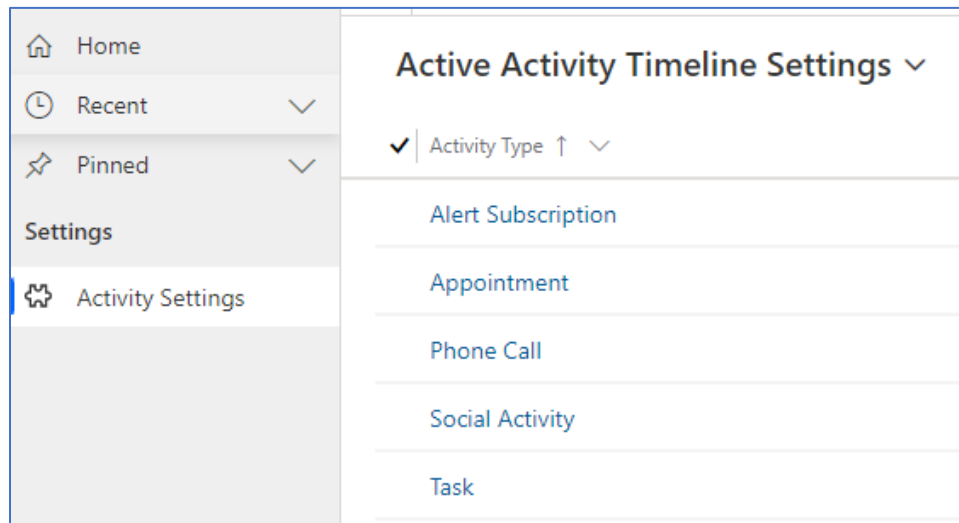
# Configure Activity Types on Timeline?

This is an optional step in case you want to only display and set specific activities, colours, and forms for activities in the activity timeline. By default activity timeline shows Email, Phone Call, Task, Appointment, and notes in a single timeline view. Continue only if you want to change this behaviour.

- Assuming the solution is installed, configure (trial/ activated) and a form is customized to contain the web resource.
- Go to Activity Timeline Apps.



- Go to Activity Settings in the Configuration area



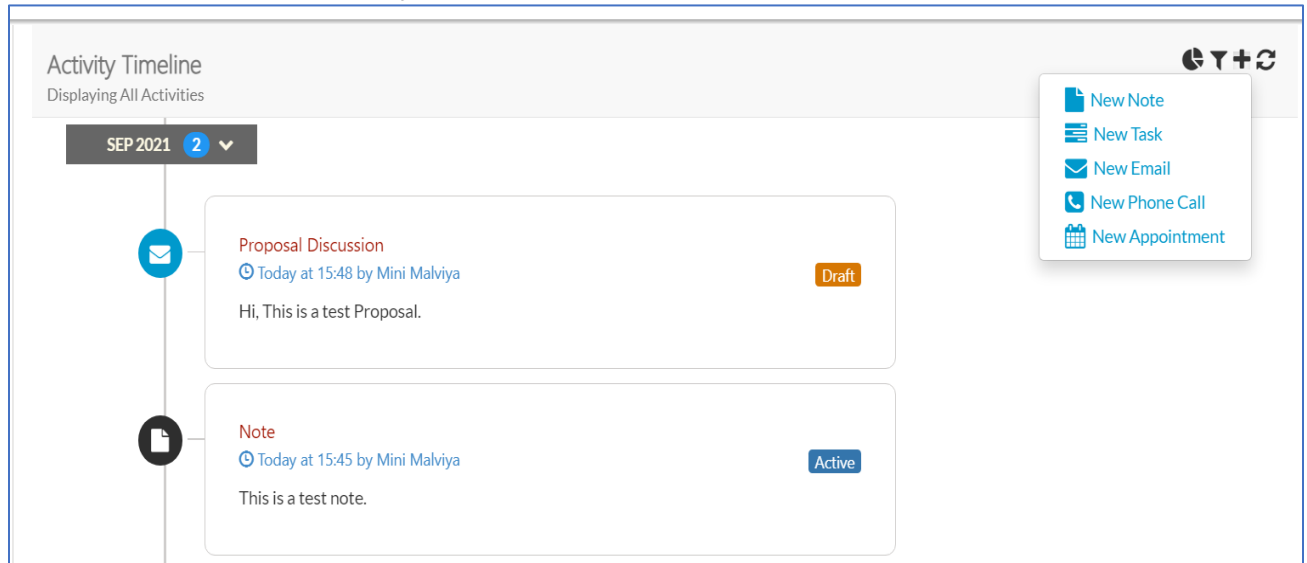
- Users can add the selected activity by creating the records under Activity Timeline Settings.
- To set up/ customize an activity, go to Activity Setting and click “New”

- This will open a new form containing the following details:
  - **Activity Type** – Users can select the type of activity that is required to show as default when the form loads.
  - **Form** – Users can select the form that is required to open at the time of adding the new activity.
  - **Completed Status** – User can set the completed status.
  - **Cancelled Status** – User can set the cancelled status.
  - **Select Activity Icon** – Users can select the icon for the activity type.
  - **Select Activity BG Color** – Users can set the color for the selected icon.

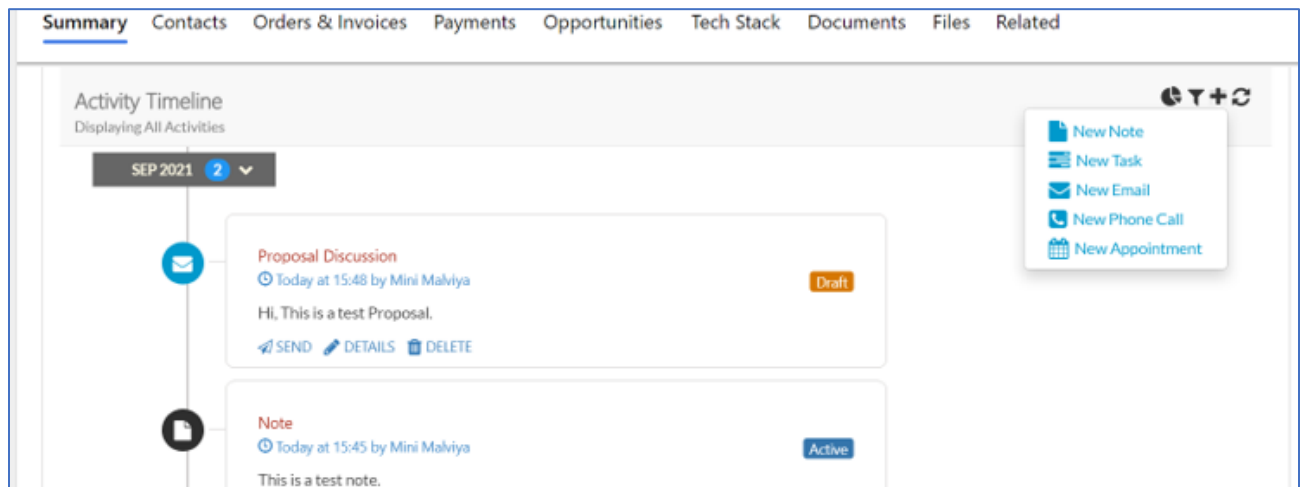
Once add an activity in the activity settings, only the configured activity along with Notes will be visible on record.

## Activity Time

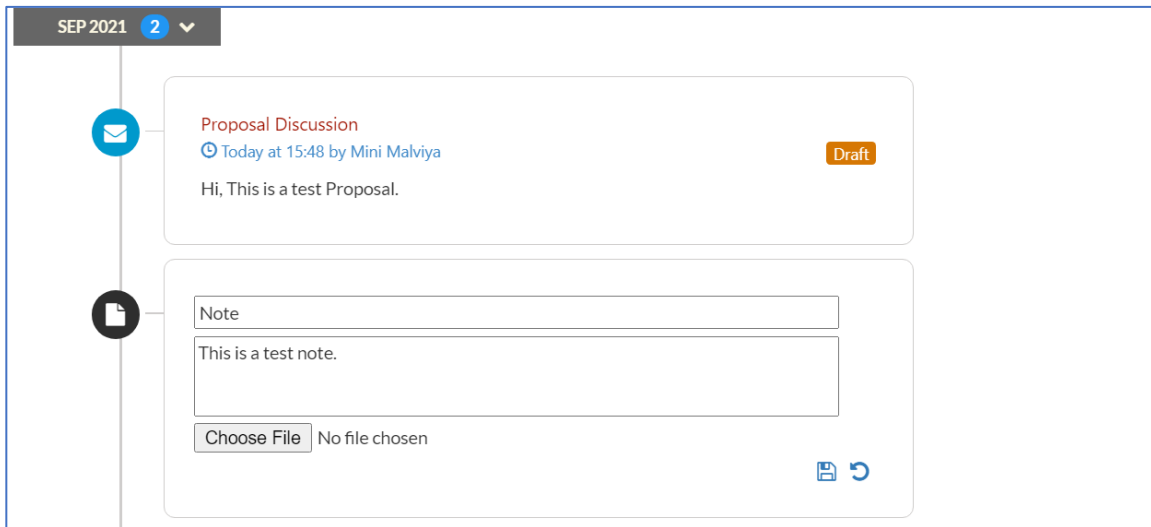
- At the top of activity, the timeline is the activity toolbar where one can add a new activity. It opens the Quick create CRM form for activity.



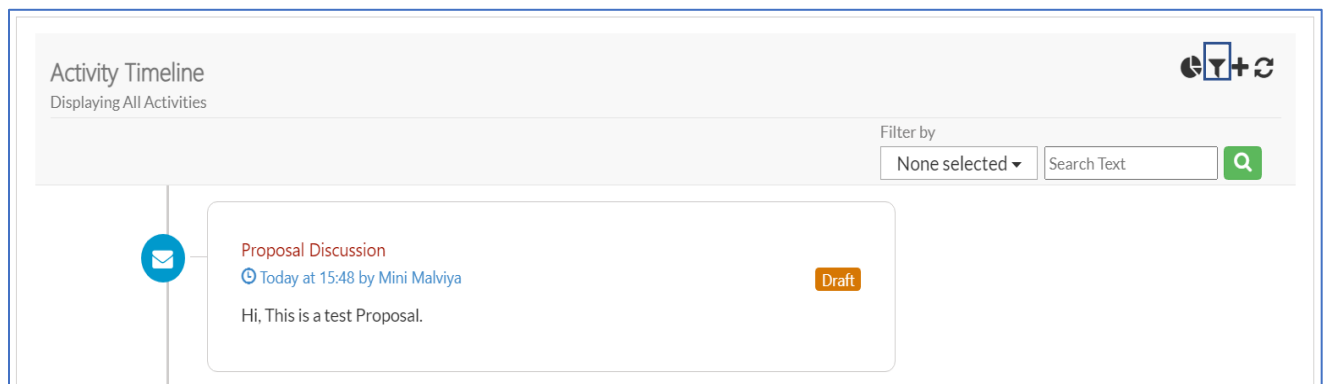
- The main pane is the set of activities that have occurred with clearly marked icons and grouped by month and year.
- Each activity has the contextual inline actions which are displayed when you hover over the activity.



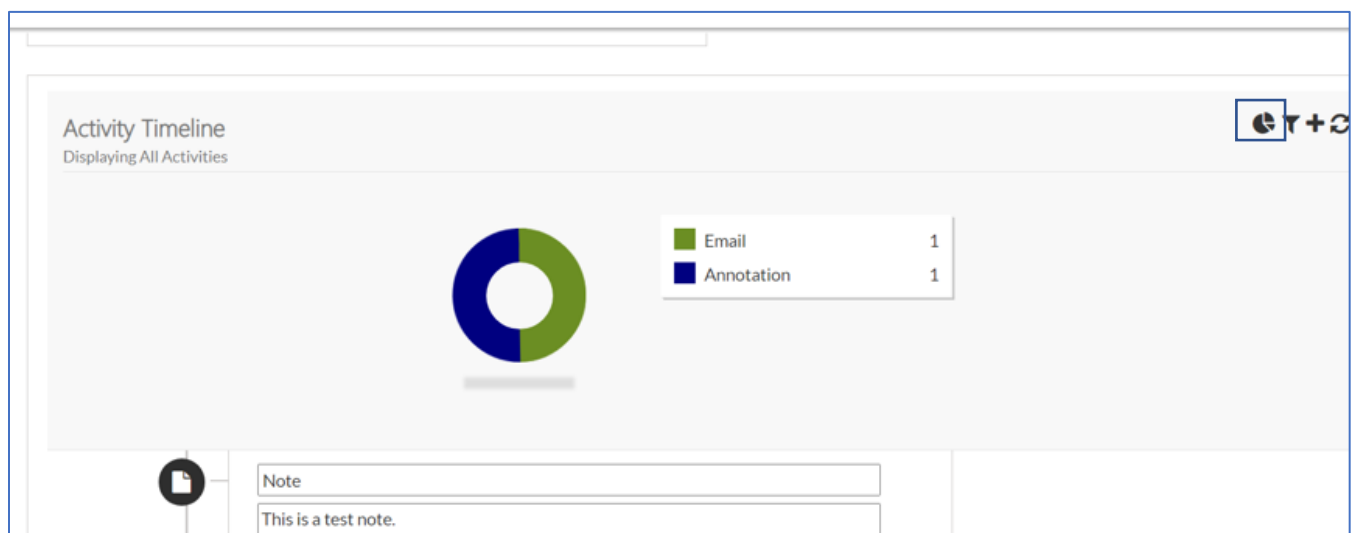
- All the activities will have two actions at minimum, first is the "Details" action to view the details & edit the activity and second is the "Delete Activity" to delete the same provided you have rights to do so.
- Each activity has a status identifier indicating the current status of the activity such as the draft, completed, etc.
- Note is a special type of activity that has inline actions i.e. users can create, delete and edit notes directly within the activity view. The below diagram depicts the inline operations for notes.



- File attachment to notes can be downloaded by clicking on the name.
- File attachment can be deleted by clicking on the delete icon in line with the file name.
- An activity can be filtered using the Filter icon.



- Activity Statistics can be viewed using the Statistic icon button on the top menu.





# Support

In case you need support and help with Activity Timeline, please feel free to contact us at [support@solzit.com](mailto:support@solzit.com)