

# **D365 Icons and Tooltips USER GUIDE**

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# 1 Introduction

## 1.1 Problems

Regarding to Microsoft document, you can [display custom icons alongside values in list views](#). But you need: *Administrators and customizers can add graphics to a view and establish the logic used to select the graphic based on a column values using JavaScript. The capability to display list views that show icons rather than text or numerical values in some columns was introduced in Relationship Insights.*

Some interest in our JJ...	Adventure W...	Won	7/18/2013	\$94,800.82	7/21/2013	\$95,000.00	 Warm	
Test		Open					 Warm	
They sell many of the ...	Contoso Phar...	Open	8/2/2013		1/7/2014	\$26,000.00	 Hot	95
Very interested in our ...	City Power & ...	Won	6/14/2013	\$40,201.49	6/29/2013	\$40,000.00	 Hot	90
Very likely will order 1...	Alpine Ski Ho...	Open	8/2/2013		12/4/2013	\$30,000.00	 Hot	
Very likely will order 7...	A. Datum Cor...	Won	3/20/2013	\$153,385.37	4/1/2013	\$16,000.00	 Cold	50
Will be ordering abou...	Coho Winery ...	Open	8/2/2013		2/5/2014	\$25,000.00	 Hot	80

After your developer coding with JavaScript code, you get the result only on this view. Another view, your developer should do it again, again and again ...

## 1.2 D365 Icons and Tooltips solution

With **D365 Icons and Tooltips** you (Salesperson, Sales manager, Customizer, Administrator ...) can:

- Easy to use the add-on.
- Easy define icons and tooltips for each view, **DON'T** need to know JavaScript.
- Included some icons collection.
- You can install more icons collection with a separator solution.
- You can create your icons collection.
- Control which users can use **D365 Icons and Tooltips**.
- **Dynamics 365 supported customize.**
- Define one, can view on: Web Desktop, Unified Client Interface (UCI), Unified Service Desk, and Dynamics 365 App for Outlook.

## 2 Supported versions, Install and Un-install

### 2.1 Supported versions

- From Dynamics 365 v.9.0

### 2.2 Install

- From [AppSource](#) search **D365 Icons and Tooltips** and install or
- From [home page](#) download solution **D365 Icons and Tooltips** and install

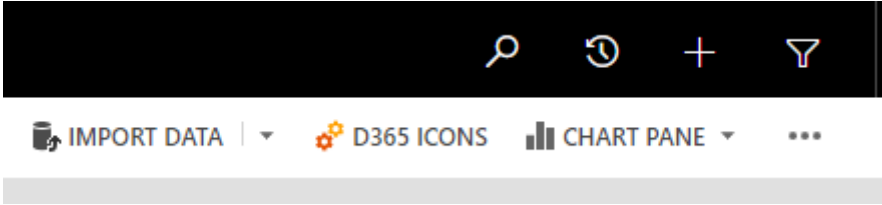
### 2.3 Un-install

- Go to: **Settings** -> **Solutions**
- Select **D365 Icons and Tooltips** solution then click the **Delete** button to un-install **D365 Icons and Tooltips** solution.

### 3 Access and Permission

#### 3.1 Access

There is **one way** you can access **D365 Icons and Tooltips**, from home page of the entity.



#### 3.2 Permission

##### 3.2.1 System Views

User needs belong role: **System Administrator** and/or **System Customizer** to use **D365 Icons and Tooltips** to define **system views**.

##### 3.2.2 Personal Views

User needs a **write** privilege on **Saved View** to use **D365 Icons and Tooltips** to define **personal views**.

Saved Organization			○						
Insights Configuration									
Saved View	👤	👤	👤	👤			👤	👤	
SharePoint Site	○	●	○	○	○	●	●	●	

## 4 Restrict user access D365 Icons and Tooltips

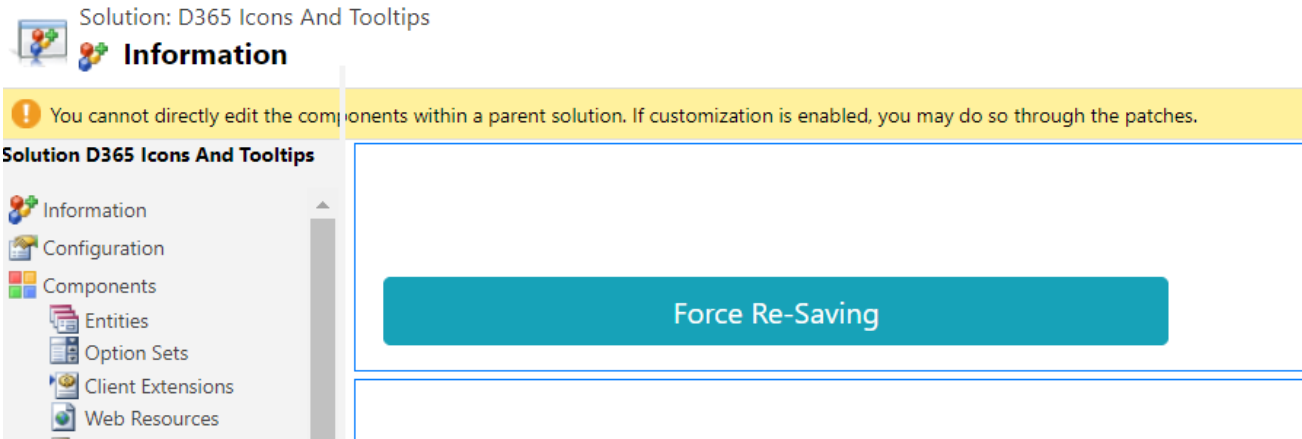
By default, when you installed **D365 Icons and Tooltips**, user who has these permissions bellow can use **D365 Icons and Tooltips**.

- User who has **System Administrator** security role and/or (for System Views)
- User who has **System Customizer** security role and/or (for System Views)
- User who has **write permission** on **Saved View** entity (for Personal Views)

But sometimes **you don't want** these users' access **D365 Icons and Tooltips** without revoke these accesses you define before. **D365 Icons and Tooltips** has an **empty** security role name: **D365 Icons and Tooltips - Access Denied**. You can assign this security role to user that you want to remove access **D365 Icons and Tooltips**.

## 5 Force Re-Saving

For some reasons, your views lost the configured **D365 Icons and Tooltips**. To fix it, your IT Admin should open **D365 Icons and Tooltips** solution, select **Configuration** in the left navigation tree, and press the button **Force Re-Saving** to force save all data again. After that, the IT Admin should **Publish All Customizations** and then your configured **D365 Icons and Tooltips** will back.





## 6 Create your Icons collection

You can create your Icons collection work with **D365 Icons and Tooltips** by following tasks hereby

### 6.1 Create a new solution

- Solution display name: should begin **D365 Icons and Tooltips - Icons Collection -**
- Solution name: should begin: **D365IconsAndTooltipsIconsCollection**
- Description: should correct syntax [ { "Name": "MyIcons", "From": "1", "To": "3", "Prefix": ".././abc\_/i", "Provider": "MyIcons", "CategoryId": "100", "Url": "http://yourwebsite.com", "Extension": "png" } ]

### 6.2 Prepare your icons

- Size: 16x16 or 24x24 or 48x48
- Extension: .png or .gif or .svg
- File name: 1.png, 2.png, 3.png....

### 6.3 Create Web Resources

- Name: **/i/100/1.png - 100 is CategoryId** and **1 is start** collection.
- Display Name: **abc\_/i/100/1.png**
- Description: **1.0.0.0 or keep it blank**
- Type: **PNG format** - your icon extension
- Language: **English**
- Upload file: **1.png** - your upload icon file.


### 6.4 Publish your solution

- Go to **D365 Icons and Tooltips** check your new icons collection

### 6.5 Example

Display Name *	D365 Icons And Tooltips - Icons Collection - My Icons Colle <b>1</b>	Name *	D365IconsAndTooltipsIconsCollectionMyIcons <b>2</b>
Publisher *	D365 Icons And Tooltips Publisher	Configuration Page	
Version *	1.0.0		
Description	<pre>[   { "Name": "MyIcons", "From": "1", "To": "3", "Prefix": ".././abc_/i", "Provider": "MyIcons", "CategoryId": "100", "Url": "http://yourwebsite.com", "Extension": "png" } ]</pre> <b>3</b>		

#### 6.1 – Create your Icons collection solution

 Solution: D365 Icons And Tooltips - Icons Collection - My Icons Collection  
**Web Resource: New**

**General**

Name\*   **1**

Display Name  **2**

Description  **3**

**Content**








Type\*  **4**


Language

Upload File   **5**

**6.3 – Create Web Resource**

Component Type  View

 New |  Add Existing |  Delete |  Remove |  Publish |  Show Dependencies |  Add Required Components

 Managed Properties | More Actions ▾

✓	Display Name ↑	Name	Type		Customizable	Description
	abc_/i/100/1.png	abc_/i/100/1.png	PNG format	Unmanaged	True	1.0.0
	abc_/i/100/2.png	abc_/i/100/2.png	PNG format	Unmanaged	True	1.0.0
	abc_/i/100/3.png	abc_/i/100/3.png	PNG format	Unmanaged	True	1.0.0

**6.3 – Create more Web Resource**

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Mylcons



- 
- Double click on image to select and close
  - Free icon collection from [Mylcons](#)
  - Download more [icons collection](#)

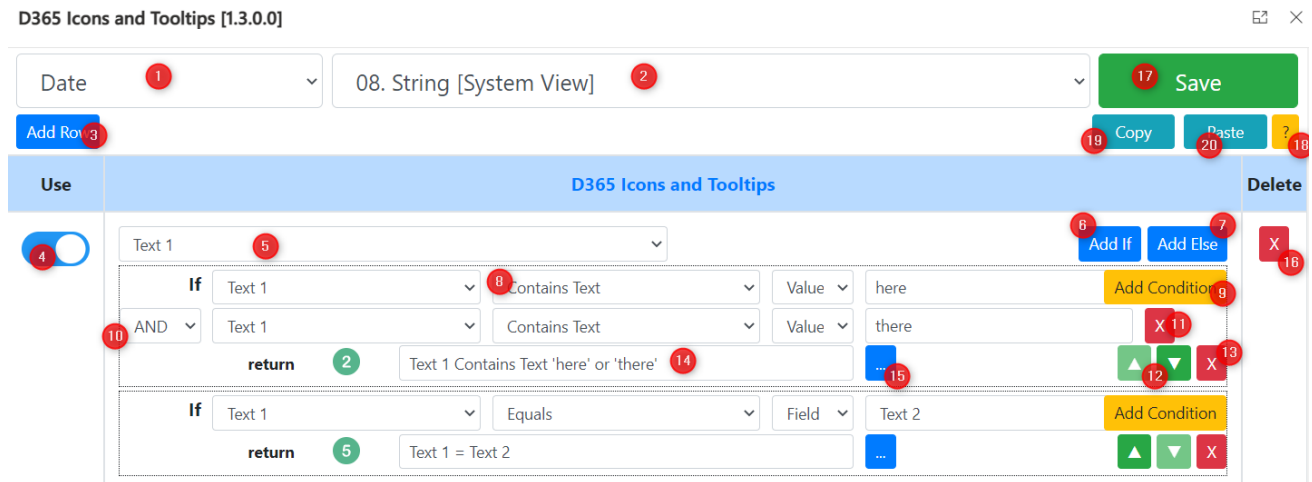
Close

Save And Close

## 6.4 Your Icons collection

## 7 Working with D365 Icons and Tooltips

### 7.1 Dialog



- 1 List all entities
- 2 List all system views and/or personal views of selected entity from (1)
- 3 Add row to define **D365 Icons and Tooltips**
- 4 Enable or Disable row
- 5 Select column to display the icon
- 6 Add If condition
- 7 Add Else
- 8 Definition if condition (like the advanced find)
- 9 Add more condition
- 10 Condition type AND/OR
- 11 Delete current condition
- 12 Move current condition to up/down
- 13 Delete if condition
- 14 Enter the description to display when user hover the mouse in the icon
- 15 Select icon to display in the column (5) from the icons collection or your own icons collection
- 16 Delete row
- 17 Save
- 18 Help and About
- 19 Copy the current define view to clipboard
- 20 Paste the copied define view to the current view

### 7.2 Parameters

#### 7.2.1 CURRENT\_USER

- Description: get current username
- Example [CURRENT\\_USER](#)

#### 7.2.2 TODAY

- Description: get current date

- Example [TODAY](#)

#### 7.2.3 CURRENT\_YEAR

- Description: get current year (get date from client user login)
- Example [CURRENT\\_YEAR](#)

#### 7.2.4 CURRENT\_MONTH

- Description: get the current month (get date from client user login)
- Example [CURRENT\\_MONTH](#)

#### 7.2.5 CURRENT\_DAY

- Description: get the current day (get date from client user login)
- Example [CURRENT\\_DAY](#)

#### 7.2.6 CURRENT\_HOUR

- Description: add or subtract days with date and return a new date.

#### 7.2.7 CURRENT\_MINUTE

Description: add or subtract days with date and return a new date.

#### 7.2.8 ADD\_DAYS(date, days)

- Description: add or subtract days with date and return a new date.
- Parameter days is negative number mean subtract days, otherwise add days.
- Example [ADD\\_DAYS\(date, days\)](#)

#### 7.2.9 MONDAY, TUESDAY, WEDNESDAY, THURSDAY, FRIDAY, SATURDAY, SUNDAY

- Description: get the current date of week by text
- Example [DAY-OF-WEEK](#)

# 8 Screenshots

## 8.1 Web Desktop – All Accounts – System View

+ NEW    DELETE |    EMAIL A LINK |    RUN REPORT    EXCEL TEMPLATES    EXPORT TO EXCEL |    IMPORT

All Accounts ▾

<input type="checkbox"/>	Account Name ↑	Industry	Main Phone	Address 1: City	Primary Contact	Em.
<input type="checkbox"/>	A. Datum Corporation (sa...	Accounting	555-0158	Redmond	Rene Valdes (sample)	son
	Adventure Works (sample)	Brokers	555-0152	Redmond Santa Cruz	Nancy Anderson (sam...	son
	Alpine Ski House (sample)	Accounting	555-0157	Missoula	Paul Cannon (sample)	son
	Blue Yonder Airlines (samp...	Insurance	555-0154	Los Angeles	Sidney Higa (sample)	son
	City Power & Light (sample)	Accounting	555-0155	Redmond	Scott Konersmann (sa...	son
	Coho Winery (sample)	Consulting	555-0159	Phoenix	Jim Glynn (sample)	son
	Contoso Pharmaceuticals (...)	Brokers	555-0156	Redmond	Robert Lyon (sample)	son
	Fabrikam, Inc. (sample)	Brokers	555-0153	Lynnwood	Maria Campbell (samp...	son
	Fabrikam, Inc. (sample)		555-0165	Cerritos	Maria Campbell (samp...	son
	Fourth Coffee (sample)	Consulting	555-0150	Renton	Yvonne McKay (sample)	son

1 - 11 of 11 (0 selected)    |    All    #    A    B    C    D    E    F    G    H    I    J    K    L    M    N    O    P    Q

### 8.2 Web Desktop – All Accounts Industry – Personal View

+ NEW DELETE | EMAIL A LINK | RUN REPORT | EXCEL TEMPLATES | EXPORT TO EXCEL |

☰ All Accounts Industry ▾

<input type="checkbox"/>	Modified On	Industry ↑	Account Name ↑	Main Phone
	6/7/2018...		Fabrikam, Inc. (sample)	555-0165
	6/8/2018...	Accounting	A. Datum Corporation (sample)	555-0158
	6/7/2018...	Accounting	Alpine Ski House (sample)	555-0157
	6/7/2018...	Accounting	City Power & Light (sample)	555-0155
	6/11/201...	Brokers	Adventure Works (sample)	555-0152
	6/7/2018...	Brokers	Contoso Pharmaceuticals (sample)	555-0156
	6/7/2018...	Brokers	Fabrikam, Inc. (sample)	555-0153
	6/11/201...	Consulting	Coho Winery (sample)	555-0159
	6/7/2018...	Consulting	Fourth Coffee (sample)	555-0150
	6/7/2018...	Consulting	Litware, Inc. (sample)	555-0151

1 - 11 of 11 (0 selected) | All # A B C D E F G H I J K L M N O P Q

### 8.3 Unified Client Interface – All Accounts – System View

Show Chart
 New
 Delete
 Refresh
 Email a Link
 Export to Excel

All Accounts

<input checked="" type="checkbox"/>	Account Name	Industry	Main Pho...	Address 1: ...	Primary Conta
	A. Datum Corporation (sample)	Accounting	555-0158	Redmond	Rene Valde
	Adventure Works (sample)	Brokers	555-0152	Santa Cruz	Nancy And
	Alpine Ski House (sample)	Accounting	555-0157	Missoula	Paul Cann
	Blue Yonder Airlines (sample)	Insurance	555-0154	Los Angeles	Sidney Hig
	City Power & Light (sample)	Accounting	555-0155	Redmond	Scott Kone
	Coho Winery (sample)	Consulting	555-0159	Phoenix	Jim Glynn (


































[All](#) # A B C D E F G H I J K L M N O

1 - 11 of 11 (0 selected)



## 8.4 Unified Client Interface – All Accounts – System View (2021 wave 2)

### All Accounts ▾

	Account Name ▾	Main Phone ▾	Do not allo... ▾	Numb... ▾	Add
<input type="radio"/>	 <a href="#">Fourth Coffee (sample)</a>	 <a href="#">555-0150</a>	 Do Not Allow	 9,500	
<input type="radio"/>	 <a href="#">Litware, Inc. (sample)</a>	 <a href="#">555-0151</a>	 Allow	 2,100	
<input type="radio"/>	 <a href="#">Adventure Works (sample)</a>	 <a href="#">555-0152</a>	 Allow	 4,300	
<input type="radio"/>	 <a href="#">Fabrikam, Inc. (sample)</a>	 <a href="#">555-0153</a>	 Allow	 2,700	
<input type="radio"/>	 <a href="#">Blue Yonder Airlines (samp...</a>	 <a href="#">555-0154</a>	 Allow	 2,900	
<input type="radio"/>	 <a href="#">City Power &amp; Light (sample)</a>	 <a href="#">555-0155</a>	 Allow	 2,900	
<input type="radio"/>	 <a href="#">Contoso Pharmaceuticals (...)</a>	 <a href="#">555-0156</a>	 Allow	 1,500	
<input type="radio"/>	 <a href="#">Alpine Ski House</a>	 <a href="#">555-0157</a>	 Allow	 4,800	
<input type="radio"/>	 <a href="#">A. Datum Corporation (sa...</a>	 <a href="#">555-0158</a>	 Allow	 6,200	
<input type="radio"/>	 <a href="#">Coho Winery (sample)</a>	 <a href="#">555-0159</a>	 Allow	 3,900	

### 8.5 Unified Service Desk – All Accounts – System View

Unified Service Desk      DASHBOARD   MY WORK   SEARCH   REMINDER   APPLICATIONS ▾

**New Session** ×

Dashboard (Global)   **Account**

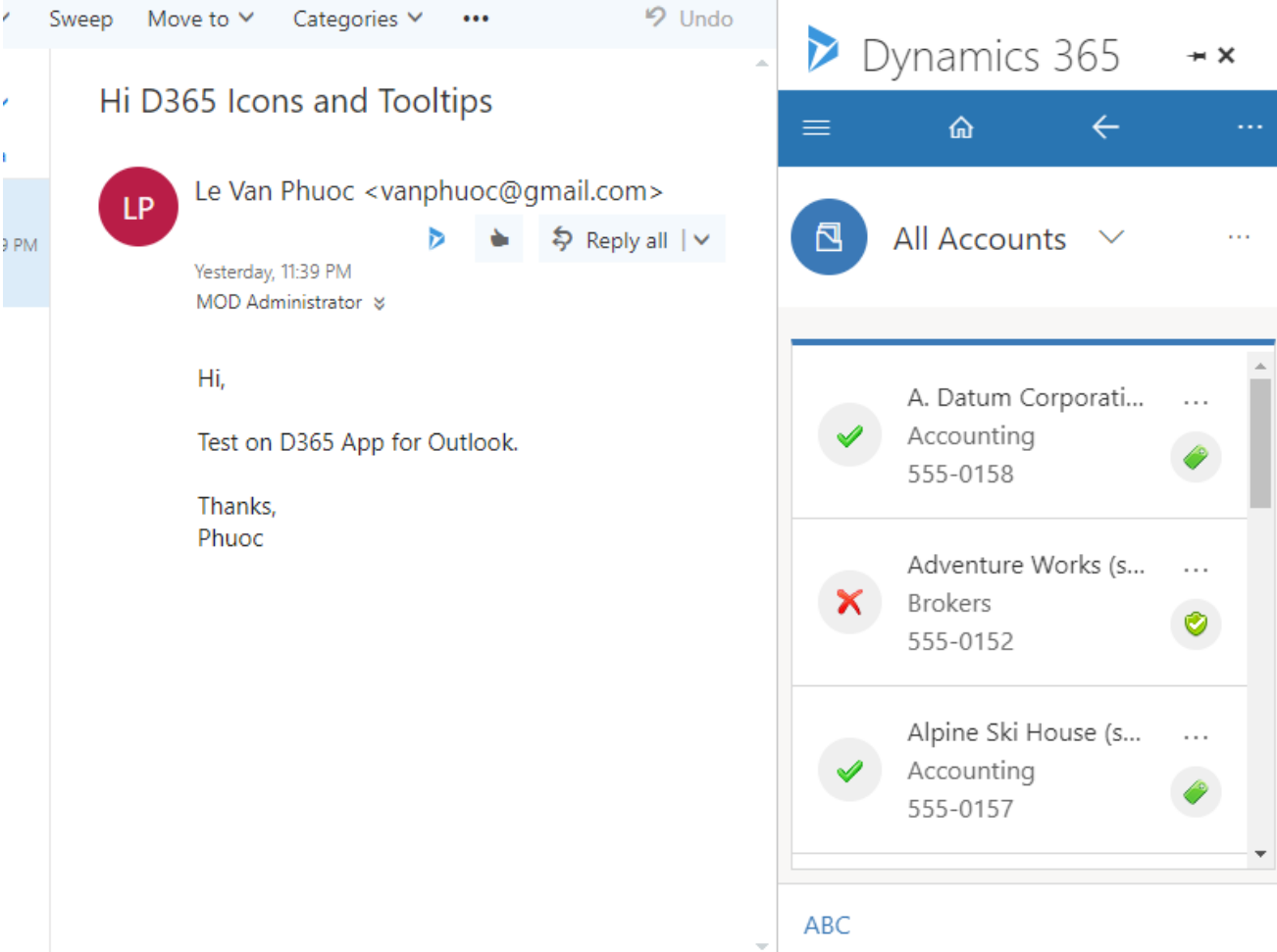
← →   Associated Cases   Associated Contacts

+ NEW   🗑️ DELETE | ▾   📧 EMAIL A LINK | ▾   📄 RUN REPORT ▾   📄 EXCEL TEMPLATES ▾   📄 EXPORT TO EXCEL | ▾

📍 All Accounts ▾

<input type="checkbox"/>	Account Name ↑	Industry	Main Phone	Address 1: Cit...	Primary Contact
✓	A. Datum Corporation (sa...	Accounting	555-0158	Redmond	Rene Valdes (sam)
✗	Adventure Works (sample)	Brokers	555-0152	Santa Cruz	Nancy Anderson (sam)
✓	Alpine Ski House (sample)	Accounting	555-0157	Missoula	Paul Cannon (sarr)
✓	Blue Yonder Airlines (sam...	Insurance	555-0154	Los Ange...	Sidney Higa (sam)
✗	City Power & Light (sample)	Accounting	555-0155	Redmond	Scott Konersman.
✓	Coho Winery (sample)	Consulting	555-0159	Phoenix	Jim Glynn (sampl)
✓	Contoso Pharmaceuticals (...)	Brokers	555-0156	Redmond	Robert Lyon (sam)
✓	Fabrikam, Inc. (sample)	Brokers	555-0153	Lynnwood	Maria Campbell (s

### 8.6 Dynamics 365 App for Outlook – All Accounts – System View



### 8.7 Web Desktop – Sales Dashboard

SAVE AS NEW | REFRESH ALL ADVANCED FIND

#### Sales Dashboard


Activity Type	Subject
Task	Evaluation Plan agreed upon (sample)
Phone C...	Likes some of our new products (sample)
Phone C...	availability of Product catalogs (sample)
Phone C...	Very likely will order from us (sample)
Task	Pain admitted by sponsor (sample)

Topic	Potential Cust...	Email Address
10 orders of Pro...	Fourth Coffe...	
10 orders or Pro...	Litware, Inc. ...	
6 orders of Prod...	Fabrikam, In...	
Interested in onl...	Fabrikam, In...	
Needs to restoc...	Blue Yonder ...	

Account Name	Industry	Main Phone
A. Datum Corporation (s...	Accounting	555-
Adventure Works (sample)	Brokers	555-
Alpine Ski House (sample)	Accounting	555-

#### Sales Pipeline

My Open Opportunities



\$25,000.00

### 8.8 Web Desktop – Sub-grid

SIGN EMAIL A LINK DELETE FORM PROCESS ...

Annual Revenue	Number of Employees	Owner*
\$9,980.00	6,200	MOD Administrator

OSTS	ASSISTANT	ACTIVITIES	NOTES
------	-----------	------------	-------

post here

**POST**

osts Auto posts User posts

- Required Service (sample)**  
Case: Created by MOD Administrator for Account A. Datum Corporation (sample).  
On Required Service (sample)'s wall  
6/6/2018 8:57:06 PM
- Operating manual required (sample)**  
Case: Created by MOD Administrator for Account A. Datum Corporation (sample).  
On Operating manual required (sample)'s wall  
6/6/2018 8:57:06 PM

Primary Contact  
Rene Valdes (sample)

Email **someone\_i@example.i**

Business **555-0108**

**CONTACTS**


Full Name ↑	Email
Rene Valdes (sa...	someone_i@exempl...
Susan Burk (sam...	someone_l@exempl...

### 8.9 Web Desktop – Associated View

ACCOUNT ▾ Annual R  
A. Datum Corporation (sample) ▾ \$9,980.0

Contact Associated View ▾

+ ADD NEW CONTACT   ↗ ADD EXISTING CONTACT   ✕ BULK DELETE   📊 CHART PANE ▾   📄 RUN REPORT ▾   📄 EXCEL TEMPI

<input type="checkbox"/>	Full Name ↑	Business Phone
	<a href="#">Rene Valdes (sample)</a>	555-0108
	 <a href="#">Susan Burk (sample)</a>	555-0111

1 - 2 of 2   |   All   #   A   B   C   D   E   F   G   H   I   J   K   L   M   N   O   P   Q

Active

### 8.10 Web Desktop – Advanced Find

Microsoft | Dynamics 365

FILE    ADVANCED FIND    LIST TOOLS    ACCOUNTS

New Account   
 Edit   
 Show AS   
 Activate   
 Merge   
 Deactivate   
 Detect Duplicates   
 Send Direct Email   
 Add to Marketing List   
 Quick Campaign   
 Mail Merge   
 Unfollow   
 Connect   
 Follow   
 Assign Accounts   
 Refresh

Records    Collaborate

<input type="checkbox"/>	Account Name ↑	Industry	Main Phone	Address 1: City	Primary Contact	Email (Pri
	A. Datum Corporation (sa...	Accounting	555-0158	Redmond	Rene Valdes (sam...	someone.
	Adventure Works (sample)	Brokers	555-0152	Santa Cruz	Nancy Anderson (...	someone.
	Alpine Ski House (sample)	Accounting	555-0157	Missoula	Paul Cannon (sam...	someone.
	Blue Yonder Airlines (samp...	Insurance	555-0154	Los Ange...	Sidney Higa (sam...	someone.
	City Power & Light (sample)	Accounting	555-0155	Redmond	Scott Konersman...	someone.
	Coho Winery (sample)	Consulting	555-0159	Phoenix	Jim Glynn (sample)	someone.
	Contoso Pharmaceuticals (...	Brokers	555-0156	Redmond	Robert Lyon (sam...	someone.
	Fabrikam, Inc. (sample)	Brokers	555-0153	Lynnwood	Maria Campbell (s...	someone.
	Fabrikam, Inc. (sample)		555-0165	Cerritos	Maria Campbell (s...	someonel
	Fourth Coffee (sample)	Consulting	555-0150	Renton	Yvonne McKay (s...	someone.
	Litware, Inc. (sample)	Consulting	555-0151	Dallas	Susanna Stubber...	someone.

### 8.11 Web Desktop – Quick Find

+ NEW    DELETE |    EMAIL A LINK |    RUN REPORT    EXCEL TEMPLATES    EXPORT TO EXCEL |    II

Search Results ▾

<input type="checkbox"/>	Account Name ↑	Account Num...	Primary Contact	Address 1: City	Main
	A. Datum Corporation (sample)		Rene Valdes (sample)	Redmond	555-0
✓	Adventure Works (sample)	ABC28UU8	Nancy Anderson (sam...	Santa Cruz	555-0
✓	Alpine Ski House (sample)	ABCO9M32	Paul Cannon (sample)	Missoula	555-0
✓	Blue Yonder Airlines (sample)	ACSHN2S4	Sidney Higa (sample)	Los Angeles	555-0
✓	Fabrikam, Inc. (sample)	AFFSE9IK	Maria Campbell (samp...	Lynnwood	12345
✓	Fourth Coffee (sample)	ABSS4G45	Yvonne McKay (sample)	Renton	555-0
✓	Litware, Inc. (sample)	ACTBBDC3	Susanna Stubberod (s...	Dallas	555-0

1 - 7 of 7 (0 selected) | All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z |



## 9 License and Price List

### 9.1 30 days trial license

By default, when **D365 Icons and Tooltips** installed, it allows you **30 days trial with full functions**.

When your trial expires. You should purchase a license to continue use **D365 Icons and Tooltips**, otherwise please un-install **D365 Icons and Tooltips**.

### 9.2 Buy license

**499\$** for **1** license per organization with free upgrade and no expire time.

Please contact [vanphuoc@outlook.com](mailto:vanphuoc@outlook.com) to make a payment.

## 10 About PhuocLe

- [Microsoft Dynamics 365 MCSE](#)
- More than 14 years maintain and develop Dynamics 365 (focusing on CRM related modules), from version 4 up to now.
- A lot of experienced working with Dynamics 365 like: develop, code and debug from server side (Plugins, Custom Workflows, Custom Actions) to client side (JavaScript, TypeScript), and experienced integrate with others system using SOAP and/or Web API.
- Experienced working with Dynamics 365 Portals, Field Service, Project Service Automation, Unified Service Desk and Voice of the Customer surveys.
- For ERP related, experienced with integration between Dynamics CRM with Dynamics AX 2012, Dynamics 365 Operations, focusing on data integration of accounts related, invoice related, sales order related.
- Familiar and experienced with various business domains such as food and beverage, information technology, plastic and e-Commerce
- Released [DynamicsCrm.DevKit](#) - a Visual Studio extensions - that help CRM developer can easy develop. (<https://github.com/phuocle/Dynamics-Crm-DevKit>)
- Released [View-FetchXML](#) - a small tool that help CRM developer easy copy/paste FetchXml code. (<https://github.com/phuocle/View-FetchXML>)
- Released [CRMCKEditor](#) - a small web resources that integrated CKEditor with Dynamics CRM. (<https://github.com/phuocle/CRMCKEditor>)
- Release other add-on product [CRM GRID PLUS 2](#) (<https://crmgridplus.com>)
- And his blog <https://phuocle.net>