Microsoft Dynamics CRM - How to Create an Activity

Dynamics CRM is not the easiest API to work with and creating an activity is a multiple step process. To create an activity, you first have to create the activity object and secondly associate it with the object in a second API call. For this example, I will be creating a phone call on an account.

1. Get the ID of the account you want to create the activity on.

2. Create the activity. I recommend you create an activity in the UI and then try to retrieve it so you can see what the correct format is. To do this call:

```
GET /activities?where=regardingobjectid =
```

Keep in mind, Dynamics CRM has a number of different types of activities. For example they have a "phonecall" activity, these are defined as the "activitytypecode". If you were to create a phone call you call POST /phonecall via the POST /{objectName} api.

You can retrieve a list of objects by calling GET /objects?getAll=true

Sample phonecall:

```json
{
  "attributes": {
    "subject": "had a phone call",
    "actualend": 1516473667000,
    "prioritycode": 1,
    "description": "had a phone call",
    "statecode": 1,
    "statuscode": 2,
    "leftvoicemail": false,
    "activitytypecode": "phonecall",
    "regardingobjectid": "fdda942a-03f4-e611-80ec-c4346bacaac0",
    "actualstart": 1516473667000
  }
}
```

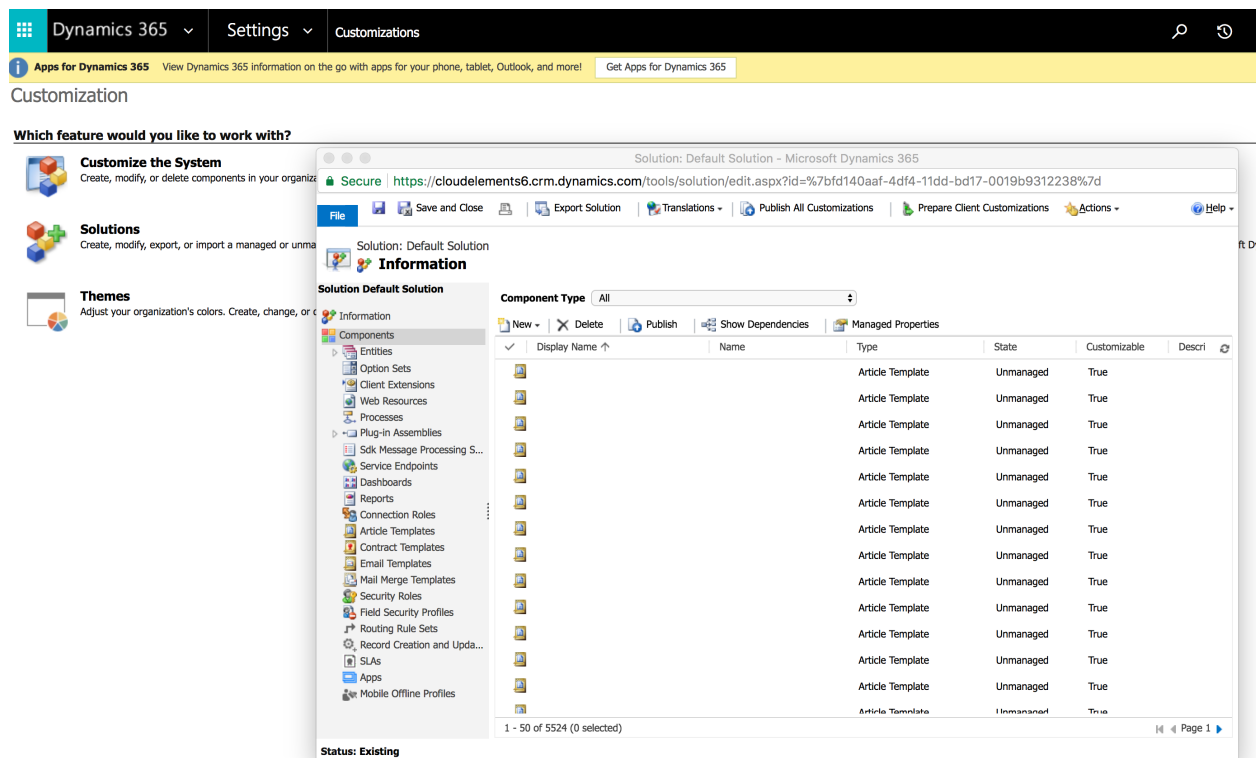3. Associate the activity with the parent object.

```
Call PATCH /accounts/{id}
```

```json
{
  "action": "associate",
  "association": {
    "entity": "phonecall",
    "id": "",
    "associationName": "Account_Phonecalls"
  }
}
```

Every object relationship will have its own associationName. To find the correct association name follow these steps in the Dynamics CRM UI:

1. Go to Settings > Customizations > Customize the System.

A popup window appears

2. Navigate to Entities.

3. Find the entity that you are trying to create an activity on. In my case, account.

4. Select **1:N relationships**.

Account
1:N Relationships

Solution Default Solution

- Components
  - Entities
    - Account
      - Forms
      - Views
      - Charts
      - Fields
      - Keys
      - 1:N Relationships
      - N:1 Relationships
      - N:N Relationships
      - Messages
      - Business Rules
      - Hierarchy Settings
      - Dashboards
    - Account Project Price L...
    - Activity
    - Actual
    - Actual Data Export
    - Address
    - Agreement
    - Agreement Booking Date
    - Agreement Booking In...
    - Agreement Booking Pr...
    - Agreement Booking Se...
    - Agreement Booking Se...

Type: All

New 1-to-Many Relationship   ✕   More Actions ▾

Schema Name ↑	Primary Entity	Relate
account_master_account	Account	Accoul
account_msdyn_approvals	Account	Approv
account_msdyn_bookingal...	Account	Bookin
account_parent_account	Account	Accoul
Account_Phonecalls	Account	Phone
account_PostFollows	Account	Follow
account_PostRegardings	Account	Post R
account_PostRoles	Account	Post R
account_principalobjectatt...	Account	Field S
Account_ProcessSessions	Account	Proces
Account_RecurringAppoint...	Account	Recurr
Account_ServiceAppointm...	Account	Servic
Account_SharepointDocu...	Account	Sharep

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5. Find the correct relationship. It will always be formatted {parentObjectName}_{childObjectName}s.

Mine is Account_Phonecalls.