

ActivityTools

for MS Dynamics CRM 2011



mscrm-addons.com
Your company for MS-CRM ADD-ONS!

ActivityTools has been developed to simplify the CRM-internal use of activities by providing Outlook-like visualization options and additional email-functionalities.



Views:

With the possibility to configure previews for each CRM entity, ActivityTools offers several comfortable display options:

Entity-specific

- Activity-Preview: Shows all activities related to a CRM-record
- Email-Preview: Shows all emails related to a CRM-record and provides additional email-features

General views

- My Activities: Shows all activities related to a user
- Preview in the standard CRM Queue-area: Provides a compact overview of all activities of a CRM-queue

All views are similar to MS Outlook consisting of a list of all activities associated to a CRM record on the left and a preview-pane on the right side of the window. This enables users to see a preview of the activity-content and to open attachments without the need to open the activity itself. Additionally, the previews can be activated within the CRM „Activities“-view, the „Activities“-view of CRM entities and within the CRM „Queues“-view. Users can also embed the previews into CRM Dashboards

Grouping

The grouping-option provides the possibility to group the activities and emails by subject, date and regarding and to show the results in a simple list-view.

Search

The included search-functionality enables users to search through all activities and to access the search results directly from within the preview.

Email-Features:

Signatures

Users can easily generate personalized or default email-signatures with a WYSIWYG-editor. This guarantees a uniform email layout within MS Dynamics CRM. The signatures will be automatically added to the content of the email activity.

Spellchecker

The spellchecker provides a professional option to check and correct the content of emails. Unknown words are recognized and users can choose whether to use a suggested word as an alternative, to extend the dictionary etc. Supported languages: English, French and German.

Standard sender

A standard sender can be defined for every user. This is very useful if all emails should be sent from one email address (e.g. from the support team's email-address).

Availability

- MS Dynamics CRM 2011 On-Premise (RTM) / Hosted (IFD) / Online

The collage displays various screenshots of the Microsoft Dynamics CRM interface with ActivityTools add-ons. Key features shown include:

- Email Preview:** A detailed view of an email within a CRM record, showing the sender, subject, and content.
- Spell Checker:** A dialog box that identifies words not in the dictionary and offers suggestions for correction.
- Signature Editor:** A WYSIWYG editor for creating and managing email signatures.
- Activity Queue:** A list view of activities and emails, demonstrating the search and grouping capabilities.
- Integration:** Red and blue boxes highlight how ActivityTools features are integrated into the standard CRM UI.

Licensing (Prices exclusive of VAT)

	Standard (Required as many licenses as there are active users in CRM)	Per User (min. 10 users)
User license:	40€	User license: 80€
Annual support:	11€	Annual support: 22€



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