



ActivityTools for MS CRM 2011

Version 5.0, August 2013

User Guide

(How to use ActivityTools for MS CRM 2011)

The content of this document is subject to change without notice.
"Microsoft" and "Microsoft CRM" are registered trademarks of Microsoft Inc.
All other product- and company names mentioned are trademarks of their respectful owners.

Table of Contents

- 1 USER GUIDE..... 3
- 2 INTRODUCTION 3
- 3 VIEWS..... 4
 - 3.1 My Emails 4
 - 3.2 My Activities..... 9
 - 3.3 Queue Preview 12
 - 3.4 Embed previews into CRM Dashboards 14
- 4 EMAIL FEATURES..... 20
 - 4.1 The Signature Editor..... 20
- 5 HOW TO ACTIVATE DEBUGGING FOR ACTIVITYTOOLS 22
- 6 CONTACT 22

1 User Guide

This guide gives detailed explanations of all functionalities provided by **ActivityTools** for MS CRM 2011.

If you need to reach us, see the Contact page.

2 Introduction

ActivityTools (AT) has been developed to simplify the use of activities within MS CRM by providing several mailing features and visualization options.

Views:

- My Emails: This feature gives you the possibility to browse through associated emails of a contact, account or any other entity similar to the way you normally view them in MS Outlook. The look and feel is similar to MS Outlook with a list of all emails and a preview pane. You can see and even open the attachments from the preview pane. This view also allows you to directly forward, reply to or print an email without the need to open the email.
- My Activities: This view provides the possibility to display all activities of a CRM record (contact, account, custom entity...). It is working just like the email preview, but all activity-types are covered (email, phone call, task, service task, letter...).

Both views provide additional "Grouping"- and "Search"-features that can be adapted to fit user-specific requirements.

Email-features:

- Default signatures: With only a few steps you can generate a default email-signature for all your users. Such standard signatures help to get a uniform email layout within MS CRM. This signature will automatically be added to new emails, forwarded emails and to emails you reply to.
- Set a standard sender: The possibility to set a standard sender for your emails is often very useful when all emails should be sent from one email address. (e.g. support teams, sales teams)
- WYSIWYG Editor: We provide a WYSIWYG editor to generate your signatures in MS CRM. By using this efficient editor, which is capable of working with HTML as well as with plain text, it is very easy to create personal signatures. Existing signatures can be imported by copy & paste.

3 Views

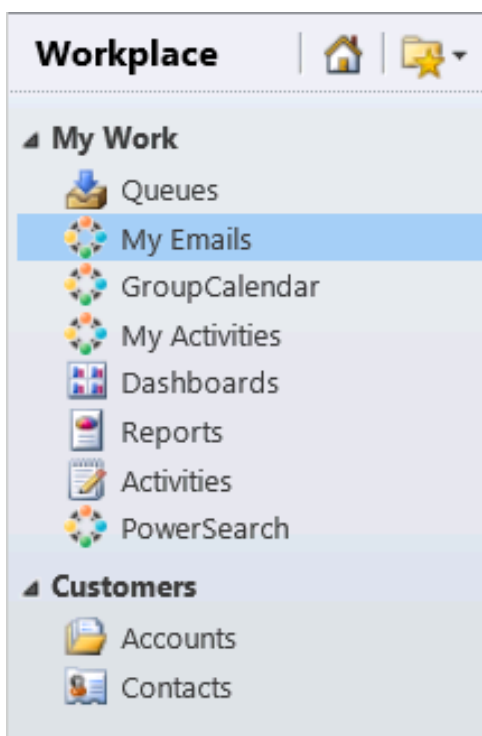
This chapter explains all views provided by ActivityTools.

3.1 My Emails

This view provides a compact overview of emails related to a specific record (e.g. company, contact, incident...)

Depending on the server-side-setup, it is available in the navigation-bar on the entity-form.

The Preview can easily be accessed through the new navigation-bar-entry "My Emails":



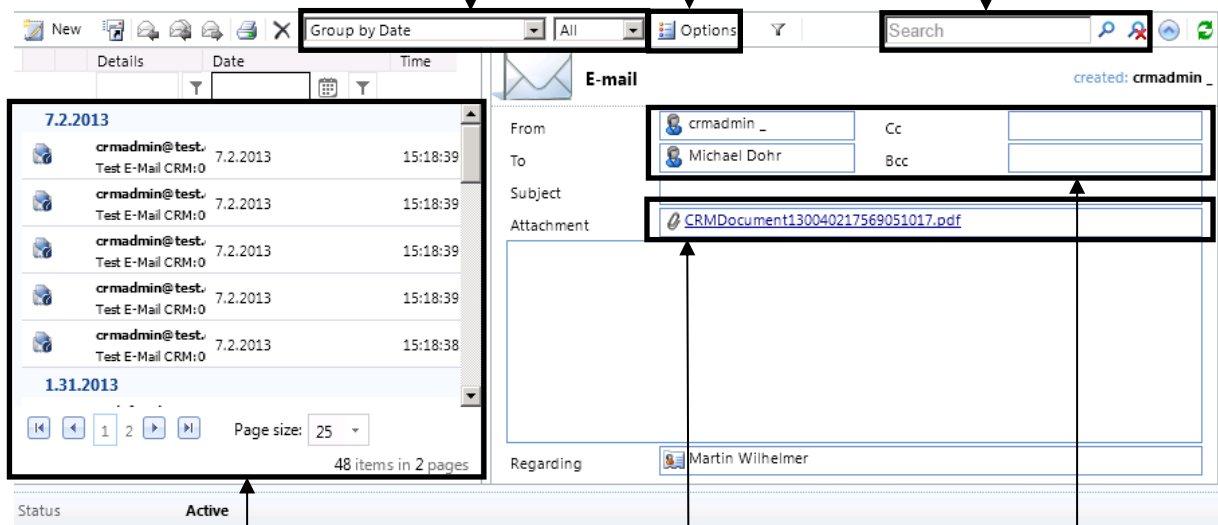
Once clicked, the view will open and will show a list of all emails and details of the selected record in the preview pane.

The view:

By clicking the "Options"-button you can select the types of email you want to include in the preview and the attributes that should be used by the search feature.

The "Search"-feature enables users to search through emails depending on the configuration (see below). CRM defaults a search where the search term has to start with the defined term. To evade this, define a Wildcard (*) before the search term.

Select a filter option

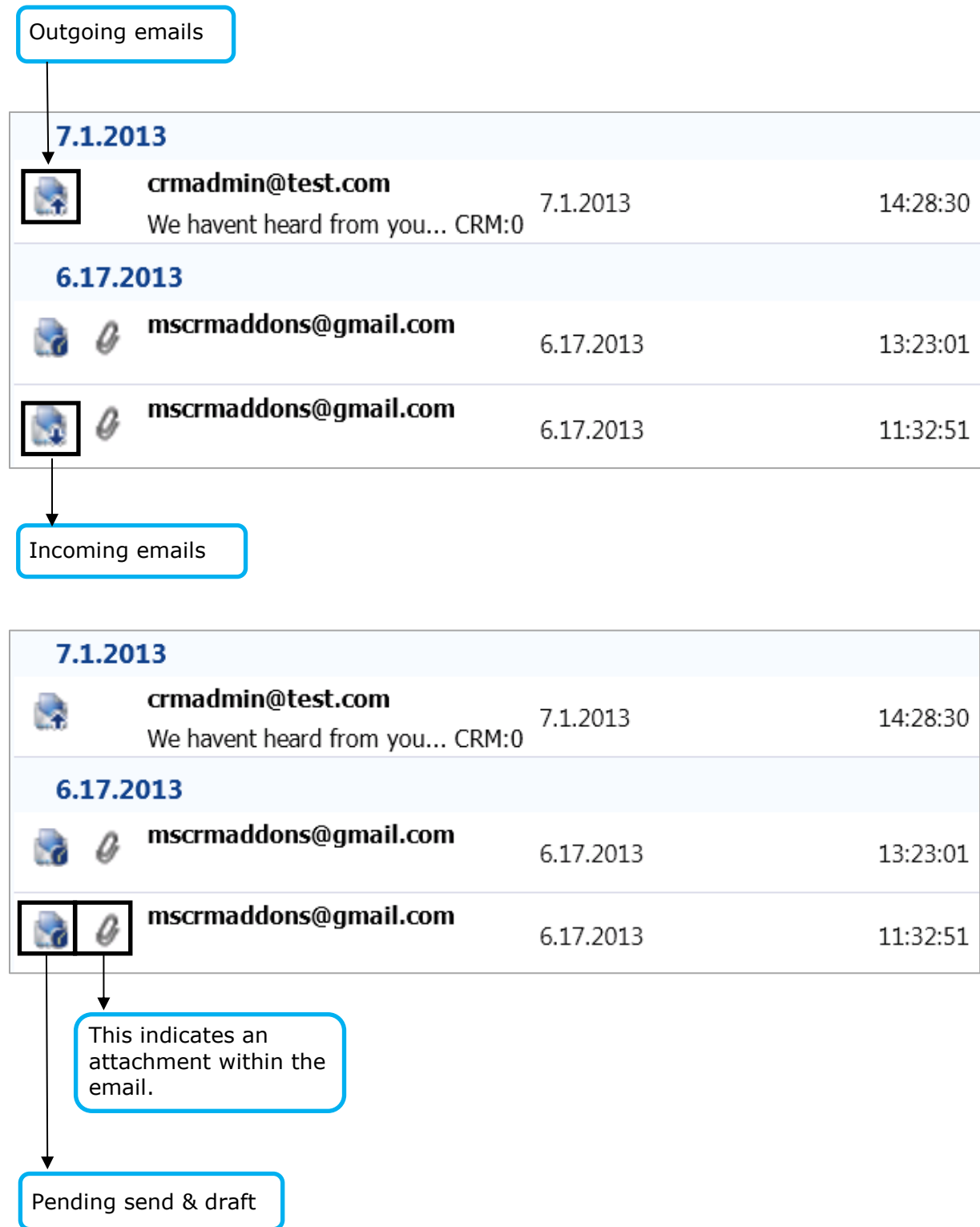


Here you can see the emails for the selected entity. You can open an email with a double-click.

You can download the attachments if available here.

From, To, CC, Bcc are links, which opens the corresponding entities.

EmailPreview-icons:



Options – MyEmails:

There are three settings:

1. Filters: Select the types of email you want to include in the preview.
2. Search: Select the attributes of the email entity which should be used by the search function.
3. View Settings: Select your preferred view settings, for example the amount of items shown per page.

Options - MyEmails

Define your personal settings for EmailTool for MS CRM 2011

Select the filters you would like to apply

- Draft
- Complete
- Sent
- Received
- Canceled
- PendingSend
- Sending
- Failed

1

Select the fields, you would like to run search for

- From
- To
- Subject
- Emailtext
- Regarding

2

Select the default view settings

Default View: ▼

Filter by age: ▼

Items per Page: ▼

3

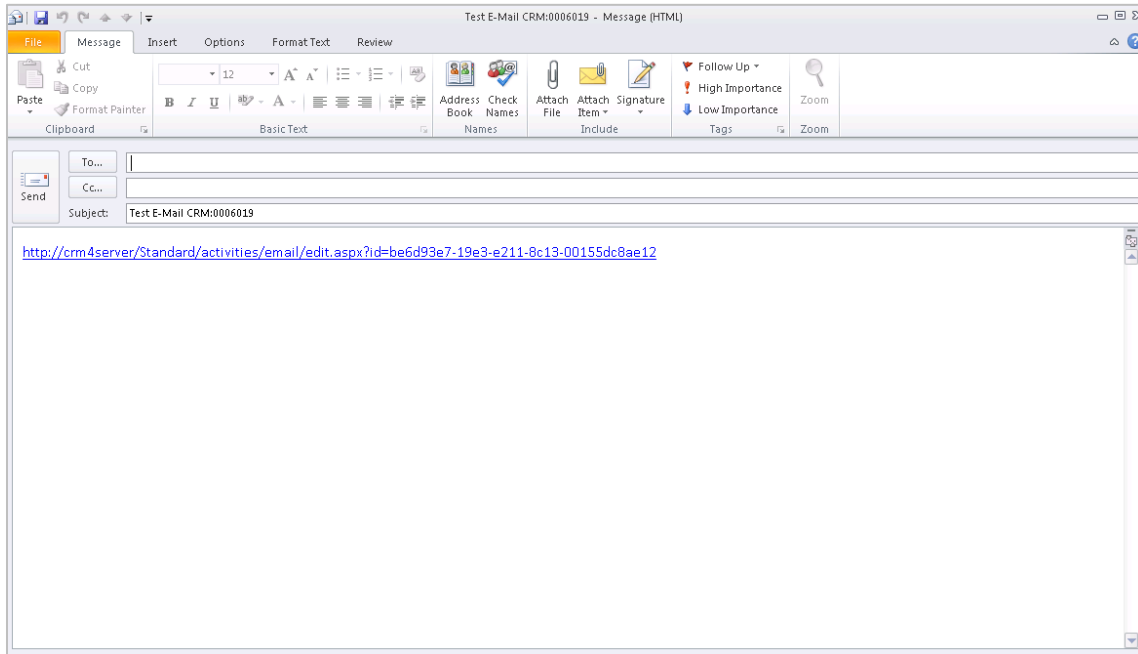
OK Close

All changes will be saved to the settings entities for each user and entity separately. This enables users to personalize the preview to fit their needs.

Email a link:



By previewing an email and pressing this button a new email will be created with the registered email client containing a CRM-link to the selected email in the content grid as displayed in the following screenshot:

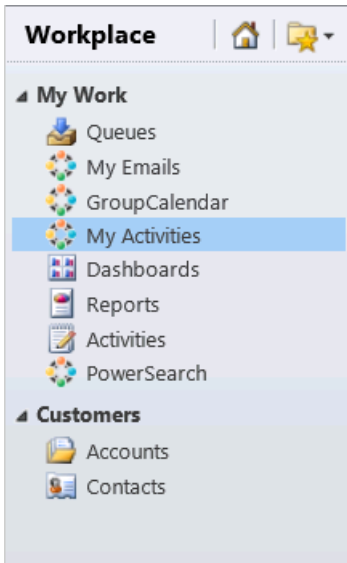


3.2 My Activities

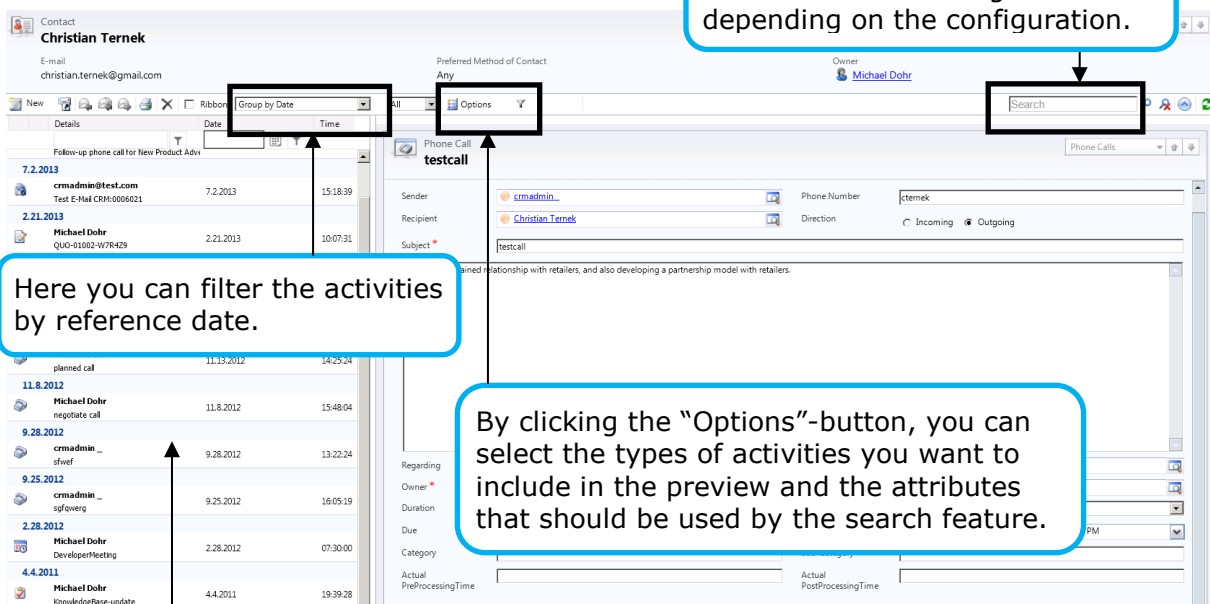
“My Activities” is an enhancement of “My Emails” ([see chapter 3.1](#)). It is capable to display all kinds of CRM activities (email, phone call, fax, letter, appointment...).

Depending on the server-side-setup, “My Activities” is available for several entities.

The preview can easily be accessed through the new navigation-bar-entry “My Activities”



The view:



The screenshot shows the 'My Activities' view for a contact named 'Christian Ternek'. It features a table of activities and a detailed view of a selected activity.

Date	Time	Activity
7.2.2013	15:18:39	Test E-Mail CRM:0006021
2.21.2013	10:07:31	Knowledgebase-update
11.13.2012	14:25:24	planned call
11.8.2012	15:48:04	negotiate call
9.28.2012	13:22:24	negotiate call
9.25.2012	16:05:19	negotiate call
2.28.2012	07:30:00	DeveloperMeeting
4.4.2011	19:39:28	Knowledgebase-update

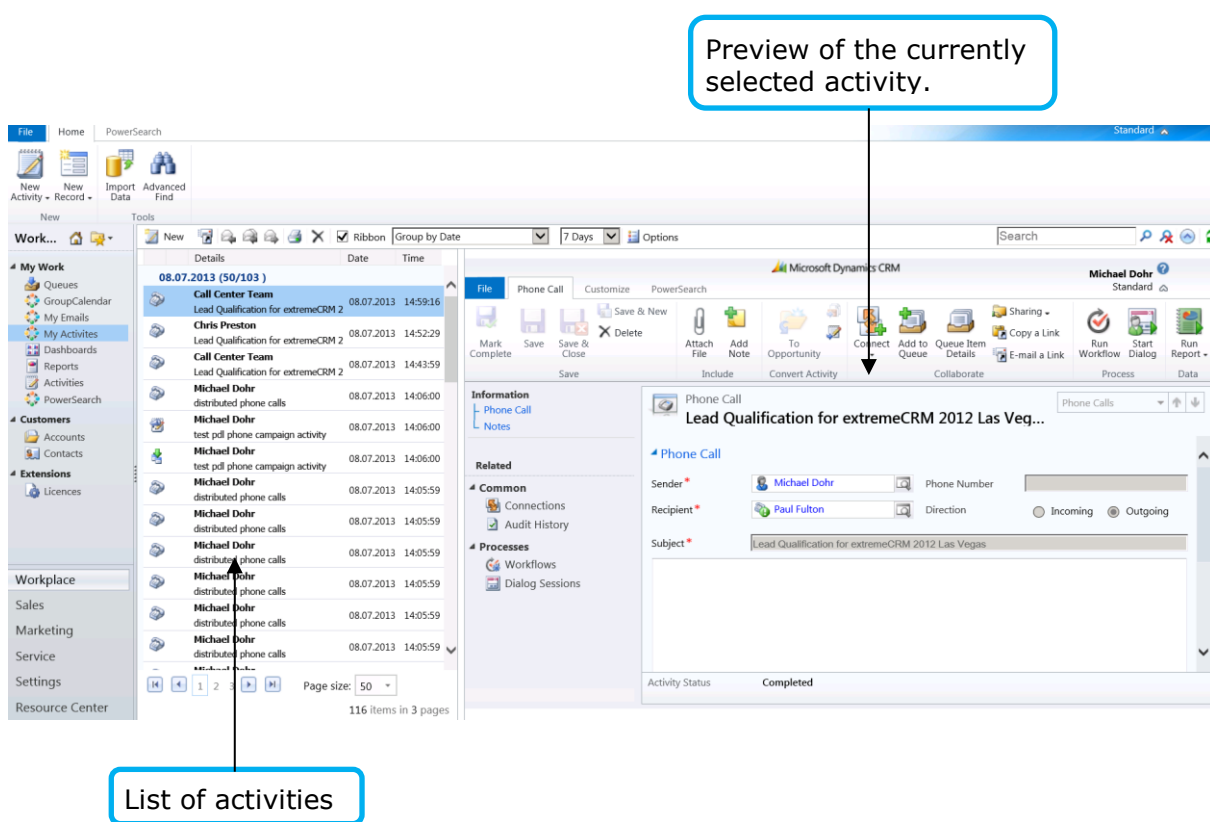
The detailed view shows a 'Phone Call' activity with the following details:

- Sender: crmadmin_
- Recipient: Christian Ternek
- Phone Number: fsternek
- Direction: Incoming
- Subject: testcall

Annotations in the image:

- A callout box points to the 'Search' field: "The 'Search'-feature enables users to search through activities depending on the configuration."
- A callout box points to the 'Group by Date' and 'Options' buttons: "Here you can filter the activities by reference date."
- A callout box points to the 'Options' button: "By clicking the 'Options'-button, you can select the types of activities you want to include in the preview and the attributes that should be used by the search feature."
- A callout box points to the activity table: "Here you can see the activities for the selected entity. Any record can be opened with a double click."

The “My Activities”-view is similar to ActivityPreview for the current CRM-user. The users are provided with compact overviews of all their activities.

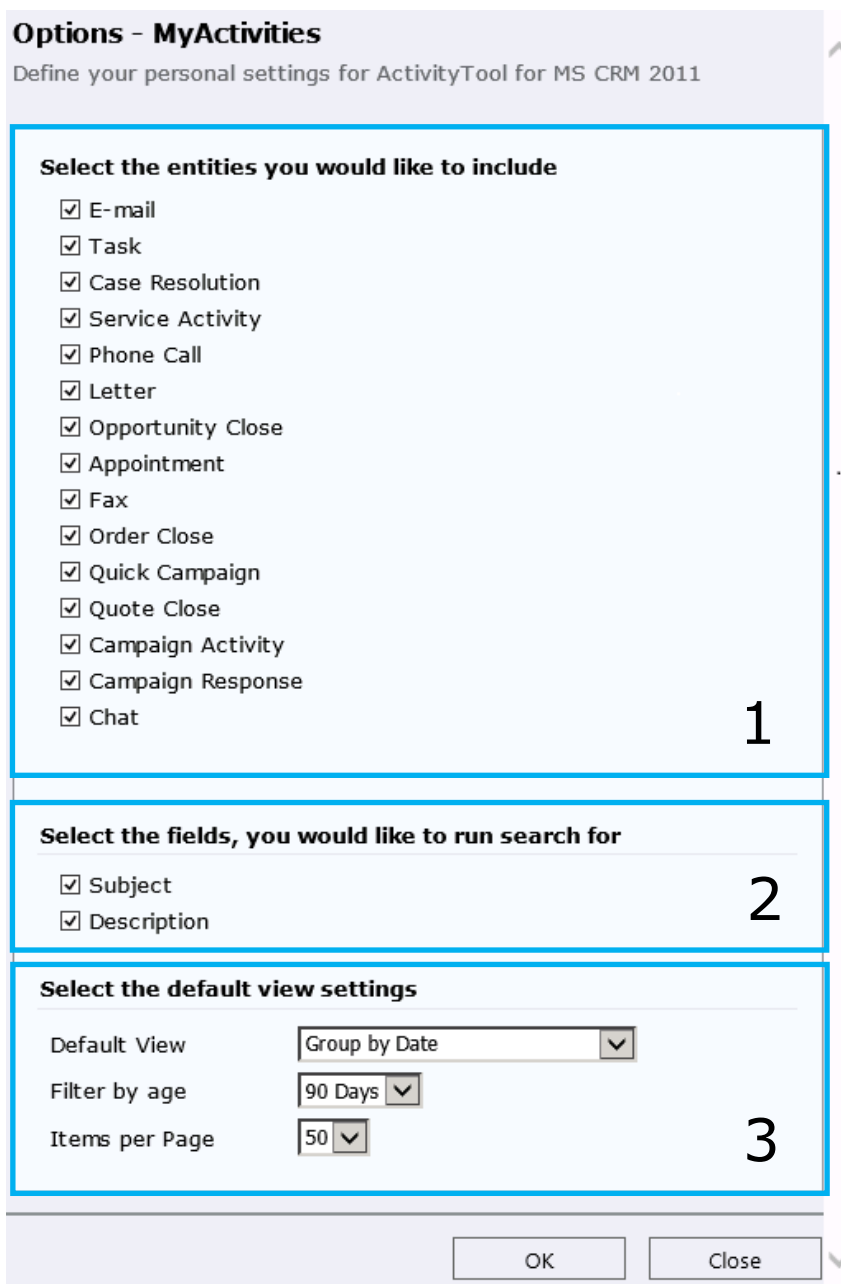


The screenshot shows the Microsoft Dynamics CRM interface. On the left, a navigation pane lists 'My Work' items: Queues, GroupCalendar, My Emails, My Activities (selected), Dashboards, Reports, Activities, and PowerSearch. Below this are 'Customers' (Accounts, Contacts) and 'Extensions' (Licences). A 'Workplace' section includes Sales, Marketing, Service, Settings, and Resource Center. The main area displays a list of activities for the date 08.07.2013 (50/103). The list includes activities from 'Call Center Team' and 'Michael Dohr'. A callout box labeled 'List of activities' points to this list. On the right, a detailed view of a 'Phone Call' activity is shown, titled 'Lead Qualification for extremeCRM 2012 Las Veg...'. A callout box labeled 'Preview of the currently selected activity.' points to this detailed view. The detailed view shows fields for Sender (Michael Dohr), Recipient (Paul Fulton), Direction (Incoming/Outgoing), and Subject (Lead Qualification for extremeCRM 2012 Las Vegas). The activity status is 'Completed'.

Options - MyActivities

In general, there are three settings:

1. Filters: Select the entities you would like to include
2. Search: Select the fields, you would like to run a search for
3. Default view settings: Select the default view settings



Options - MyActivities
Define your personal settings for ActivityTool for MS CRM 2011

Select the entities you would like to include

- E-mail
- Task
- Case Resolution
- Service Activity
- Phone Call
- Letter
- Opportunity Close
- Appointment
- Fax
- Order Close
- Quick Campaign
- Quote Close
- Campaign Activity
- Campaign Response
- Chat

Select the fields, you would like to run search for

- Subject
- Description

Select the default view settings

Default View: Group by Date

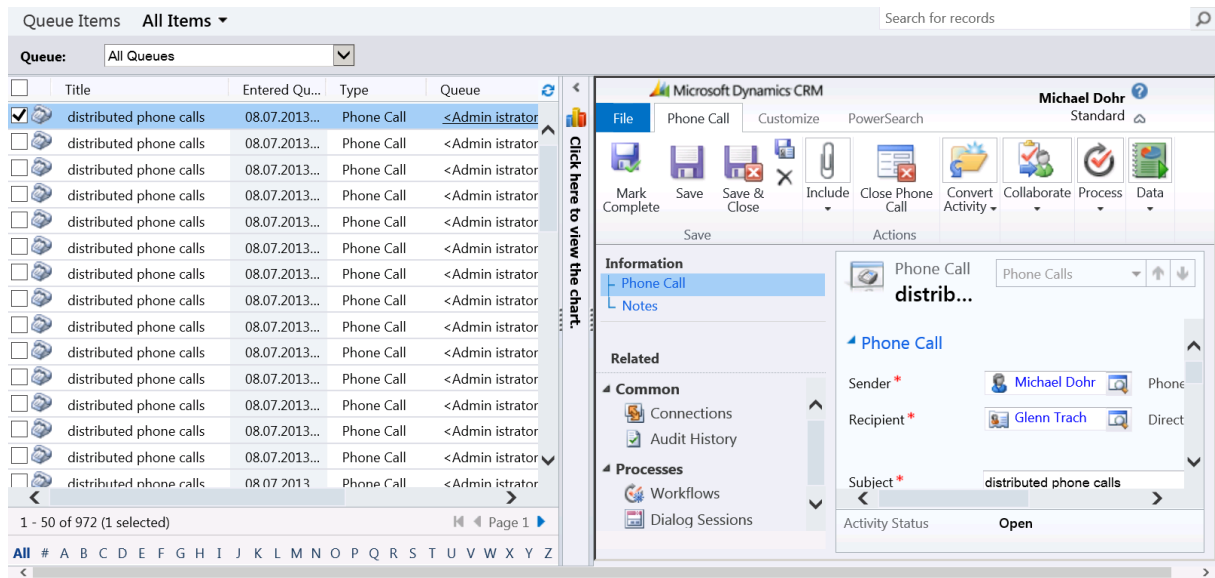
Filter by age: 90 Days

Items per Page: 50

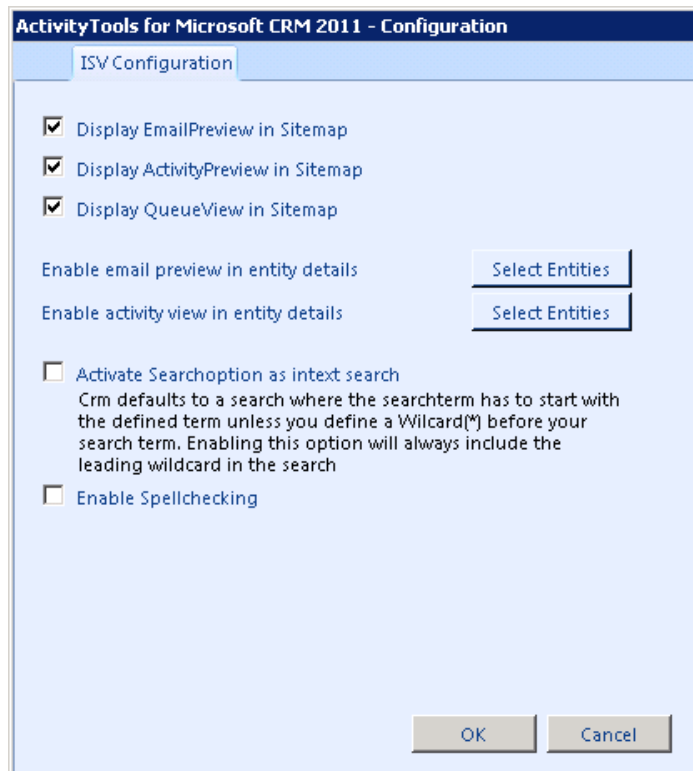
OK Close

All changes will be saved to the settings entities for each user and entity separately. As for the "My Emails", this enables users to personalize the preview.

You can also display other entities (all entity- and activity- types are supported).



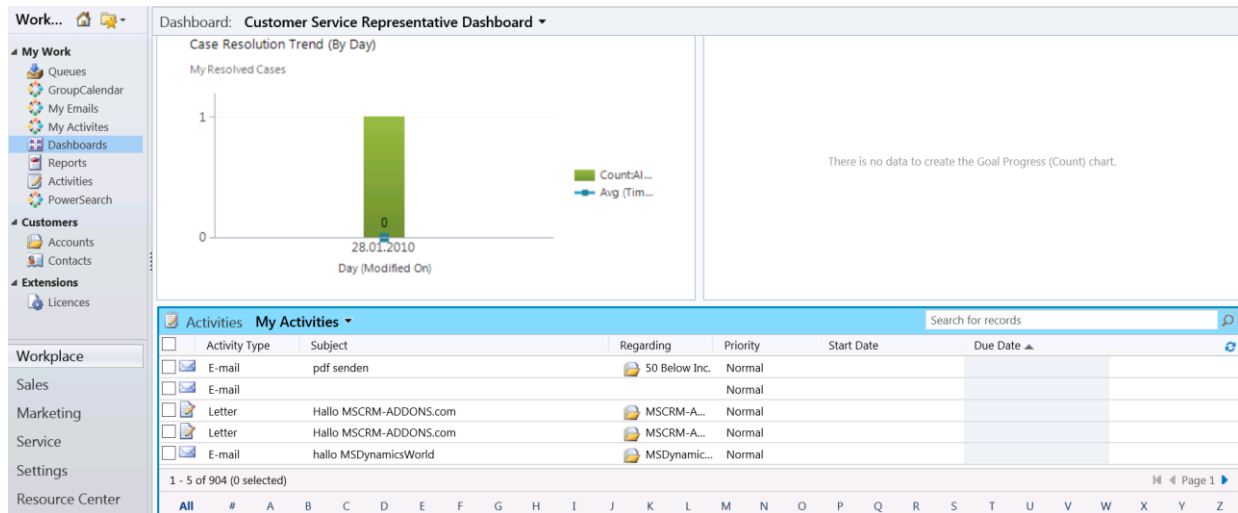
To activate this feature, you have to open the ActivityTools configuration and enable the "Display QueueView in Sitemap"-option.



3.4 Embed previews into CRM Dashboards

With this additional feature of ActivityTools you can easily embed the ActivityTools previews into your own CRM dashboard.

Depending on your configuration, it is possible to show one or multiple previews in one dashboard. (see screenshots below)



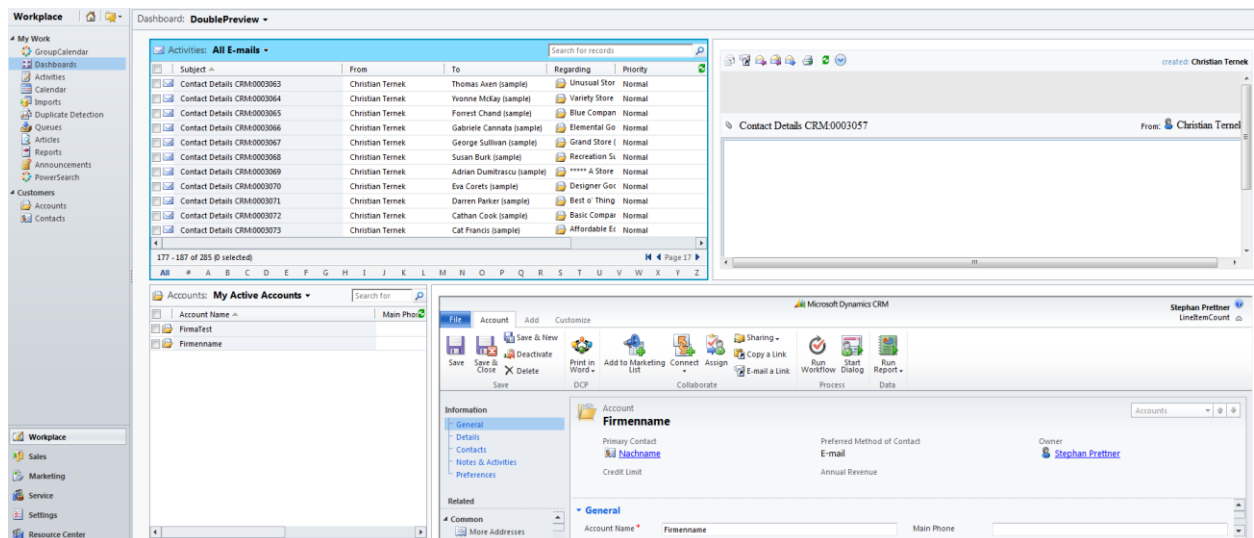
Dashboard: Customer Service Representative Dashboard

Case Resolution Trend (By Day)

My Resolved Cases

There is no data to create the Goal Progress (Count) chart.

Activity Type	Subject	Regarding	Priority	Start Date	Due Date
E-mail	pdf senden	50 Below Inc.	Normal		
E-mail			Normal		
Letter	Hallo MSCRM-ADDONS.com	MSCRM-A...	Normal		
Letter	Hallo MSCRM-ADDONS.com	MSCRM-A...	Normal		
E-mail	hallo MSdynamicsWorld	MSDynamic...	Normal		



Dashboard: DoublePreview

Activities: All E-mails

Subject	From	To	Regarding	Priority
Contact Details CRM:0003963	Christian Ternek	Thomas Aven (sample)	Unusual Stor	Normal
Contact Details CRM:0003964	Christian Ternek	Yvonne McKay (sample)	Variety Store	Normal
Contact Details CRM:0003965	Christian Ternek	Forrest Chand (sample)	Blue Compan	Normal
Contact Details CRM:0003966	Christian Ternek	Gabriele Cannata (sample)	Elemental Go	Normal
Contact Details CRM:0003967	Christian Ternek	George Sullivan (sample)	Grand Store I	Normal
Contact Details CRM:0003968	Christian Ternek	Susan Burk (sample)	Recreation S4	Normal
Contact Details CRM:0003969	Christian Ternek	Adrian Dumbrascu (sample)	**** A Store	Normal
Contact Details CRM:0003970	Christian Ternek	Eva Corets (sample)	Designer Got	Normal
Contact Details CRM:0003971	Christian Ternek	Darren Parker (sample)	Best o' Thing	Normal
Contact Details CRM:0003972	Christian Ternek	Colman Cook (sample)	Basic Compa	Normal
Contact Details CRM:0003973	Christian Ternek	Cal Francis (sample)	Affordable E1	Normal

Accounts: My Active Accounts

Account Name: Firmname

Information: Details, Contacts, Notes & Activities, Preferences

Related: Common, More Addresses

Microsoft Dynamics CRM

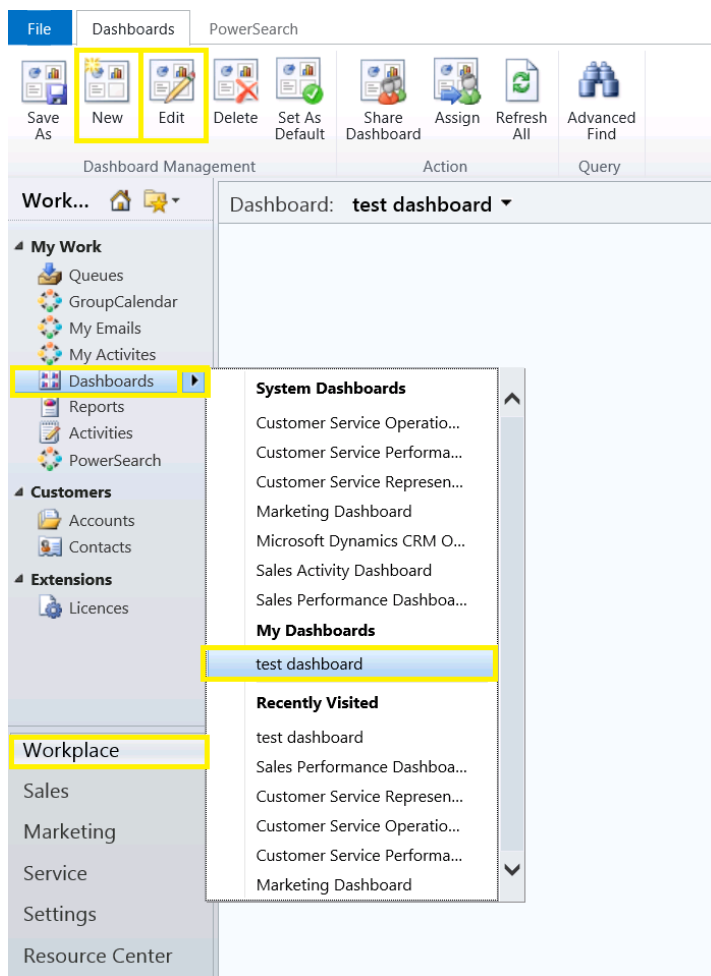
Stephan Pretzler

How to embed the previews into CRM Dashboards

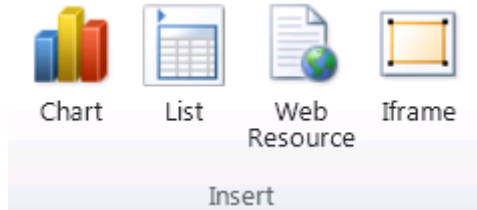
After you successfully installed the latest version of ActivityTools you are able configure your dashboard.

Start in the “Workplace”-area in your CRM system and navigate to CRM “Dashboards”.

- If you already defined custom dashboards, choose the custom dashboard you want to edit from the “Dashboards” dropdown menu as shown below and click on “Edit” in the CRM menu on the top.
- If you would like to create a new custom dashboard, click on “New” in the CRM menu.

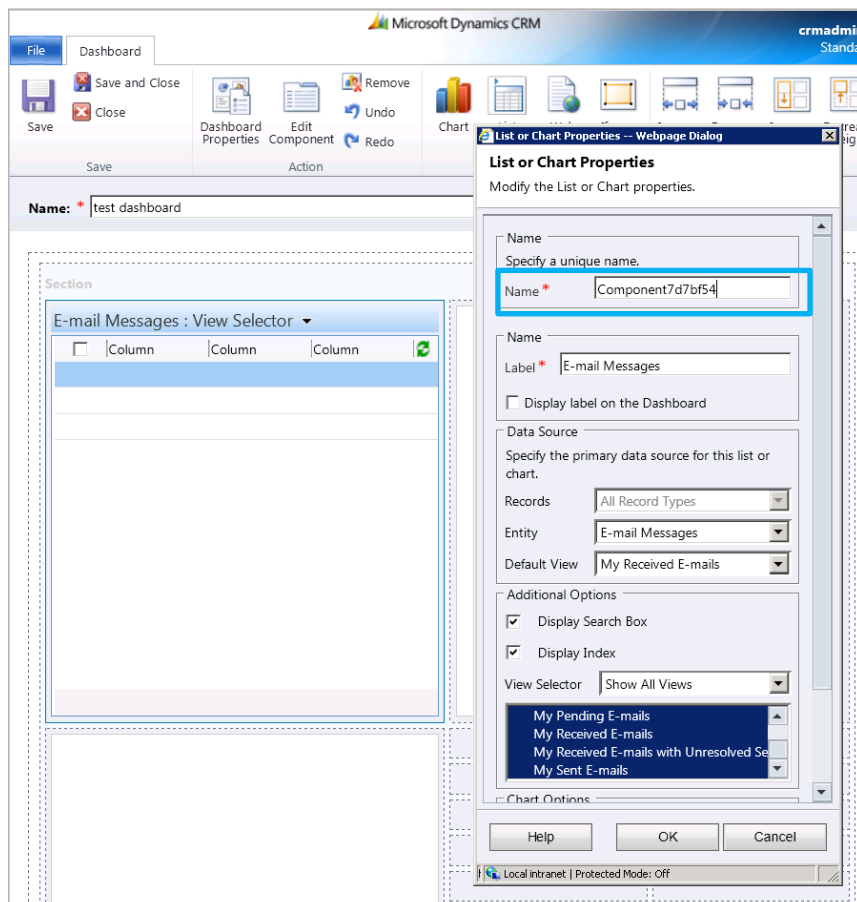


Enter a name for your dashboard in the dashboard-configuration-window. Select an empty grid and choose one of the insert possibilities. In our case we choose "List" and "Email Messages".

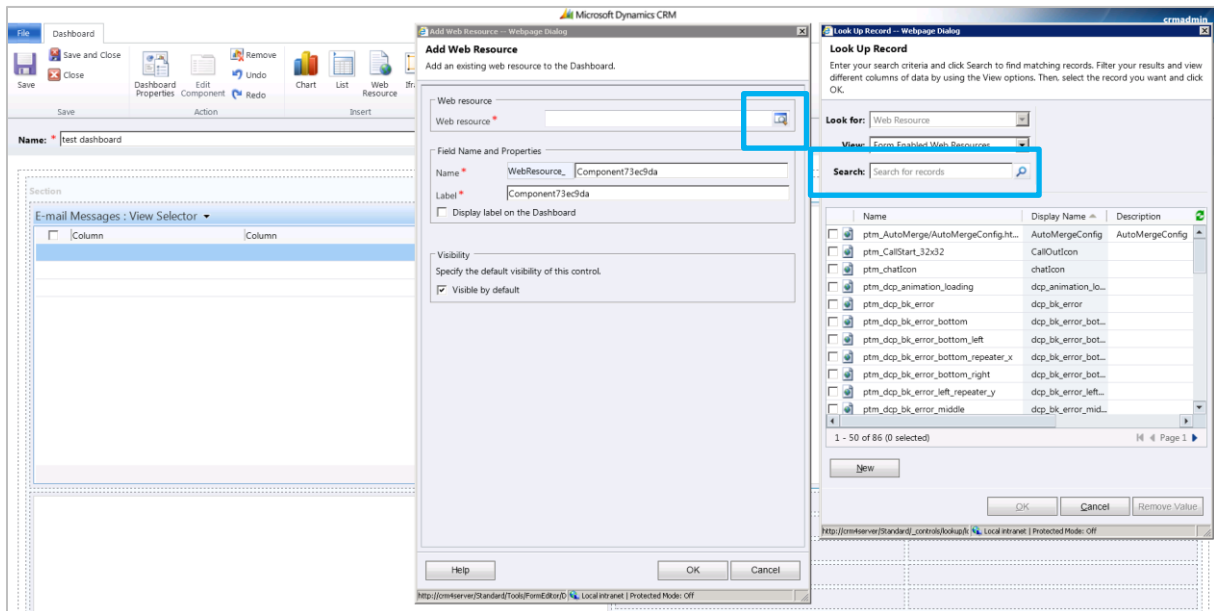


Next, you have to double-click on the grid in which you want the preview to be shown.

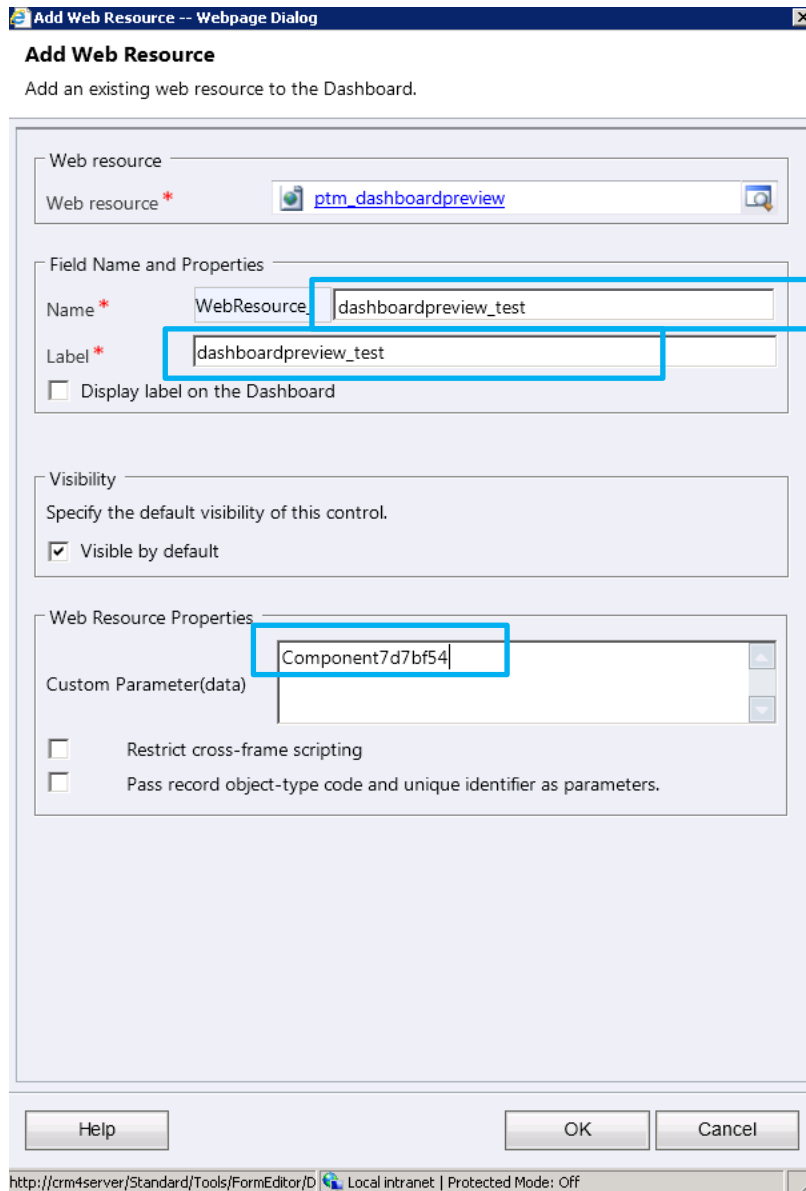
In our example, we double-click on "email Messages". Then, a new window appears with an important attribute called "Name". Copy the value of this attribute (see screenshot below, highlighted in blue) and write it down for later. Click on "OK" to close the window.



Afterwards, click on "Web Resource" in the CRM menu on the top to add a new web resource. A new window appears called "Add Web Resource". Within this window click on the LookUp-button (see screenshot below, highlighted in blue) to search for a web resource. Then, another window appears. Within this window, type "ptm_dashboardpreview" into the search field and search for it. There should be one exact match, select it and press "OK".



Afterwards, enter a name and a label for the dashboard-preview. In the "Web Resource Properties"-area of this window, insert the value of the grid-name which you have written down previously and finally press "OK".



Add Web Resource
Add an existing web resource to the Dashboard.

Web resource
Web resource *

Field Name and Properties
Name *
Label *
 Display label on the Dashboard

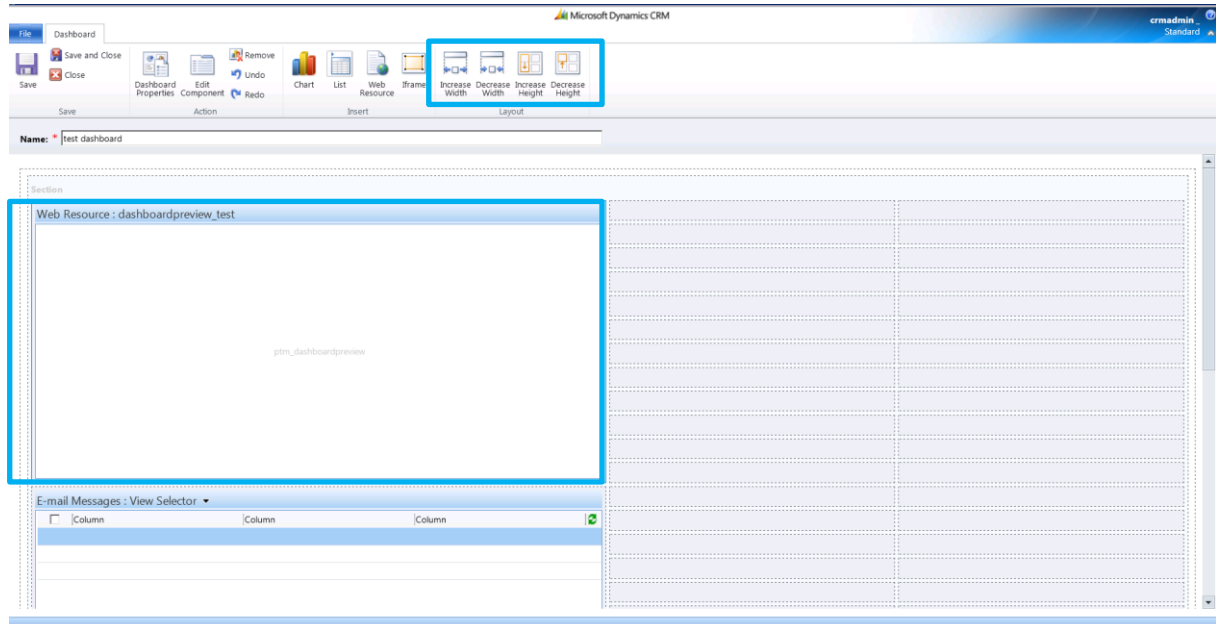
Visibility
Specify the default visibility of this control.
 Visible by default

Web Resource Properties
Custom Parameter(data)
 Restrict cross-frame scripting
 Pass record object-type code and unique identifier as parameters.

Help OK Cancel

http://crm4server/Standard/Tools/FormEditor/D Local intranet | Protected Mode: Off

Now, the dashboard-preview is added to the dashboard. To modify the height and width of the preview, click on the preview and use the scaling buttons in the CRM menu on the top. Finally, click on "Save and Close" to see the preview in your CRM Dashboards.



4 Email Features

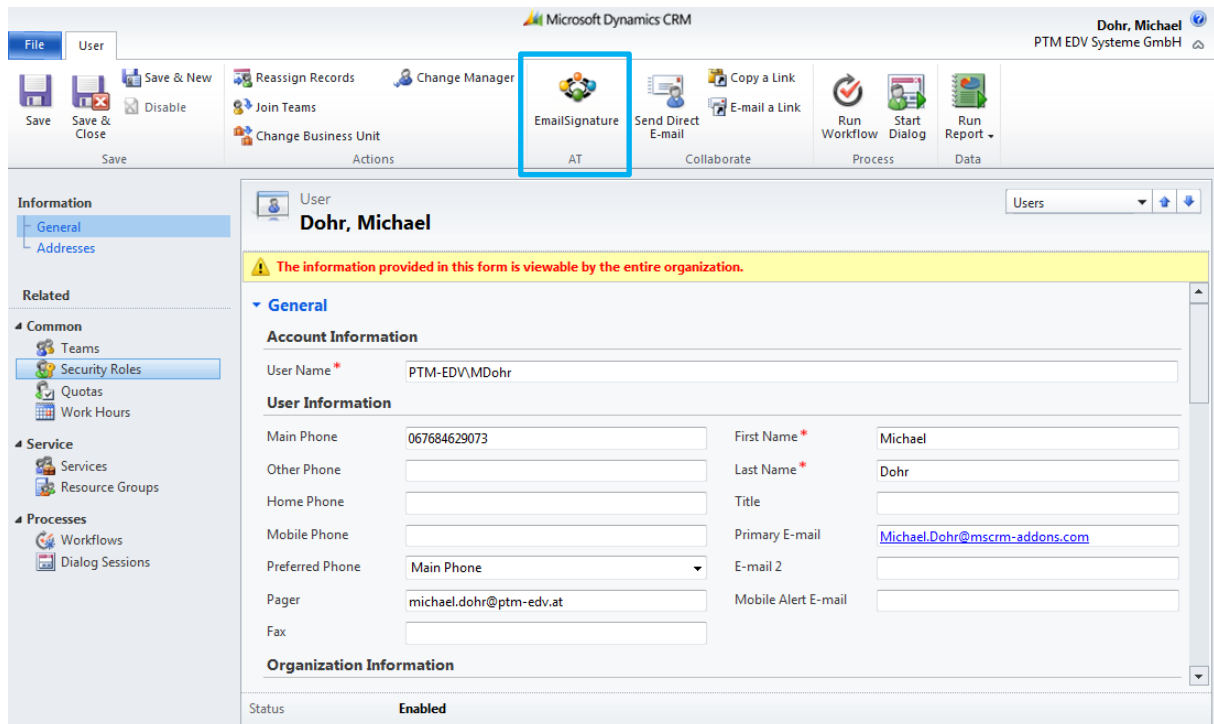
In this chapter we will take a look at the email features provided by ActivityTools for MS CRM 2011. Those are:

1. Defining default signatures
2. Use default sender
3. Define a personalized signature

4.1 The Signature Editor

All of the features mentioned above can be configured with the Signature Editor.

As every user is entitled to create a personalized signature, the settings are located on the User-entity within CRM. Therefore, the settings can be accessed by opening the User-record and by clicking on the "EmailSignature"-icon in the taskbar.



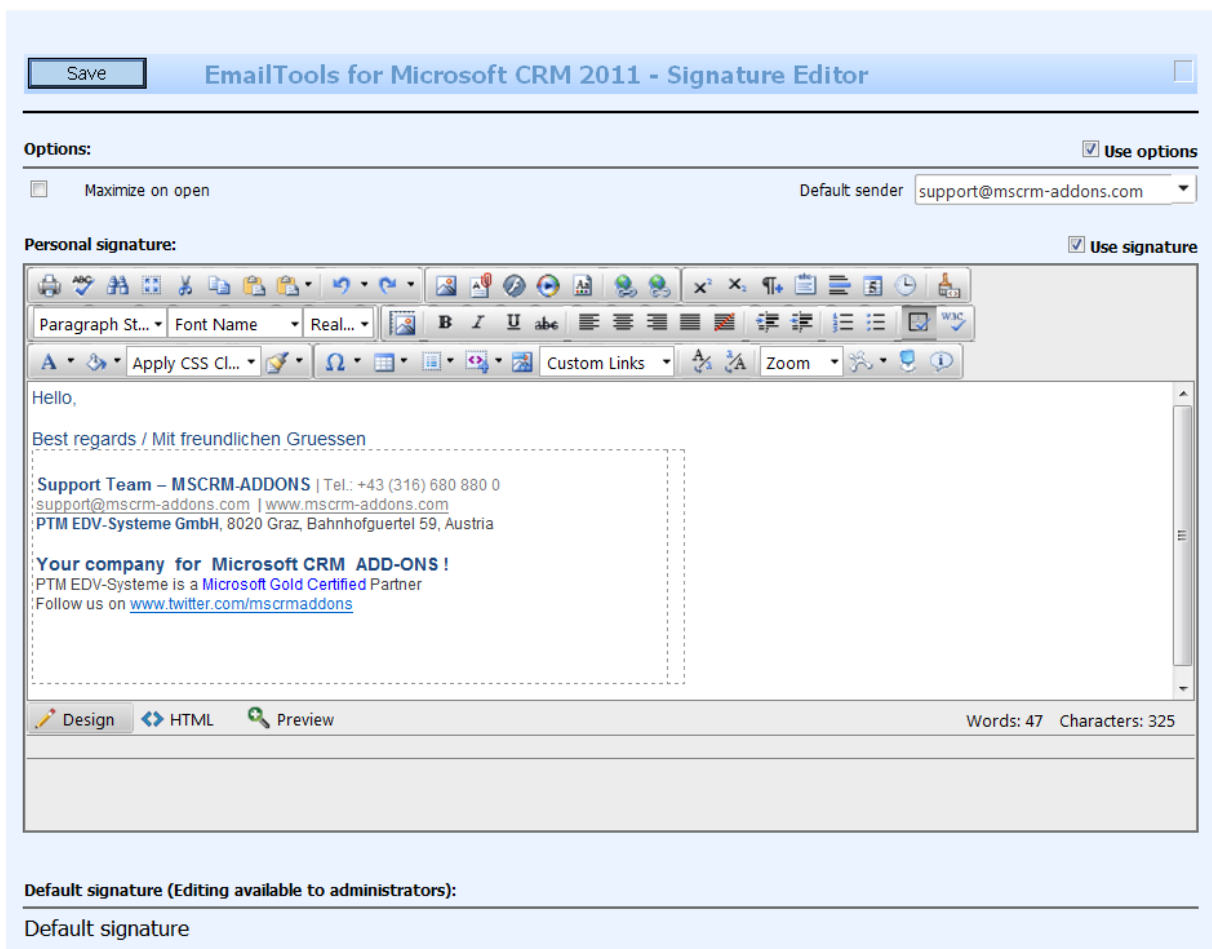
The Signature-Editor-window

This editor allows you to create your personalized signature in the way you want. By using this efficient WYSIWYG editor, which is capable of working with HTML as well as with plain text, it is very easy to create personal signatures. Existing signatures can be imported by copy & paste.

It is possible to define a default sender for your emails.

This is often very useful if all emails should be sent from one email address (e.g. support teams, sales teams).

Finally, the "Maximize on Open"-functionality allows to define whether new email-activities should be maximized once created or not.



Save EmailTools for Microsoft CRM 2011 - Signature Editor

Options: Maximize on open Use options
 Default sender: support@mscrm-addons.com

Personal signature: Use signature

Design HTML Preview Words: 47 Characters: 325

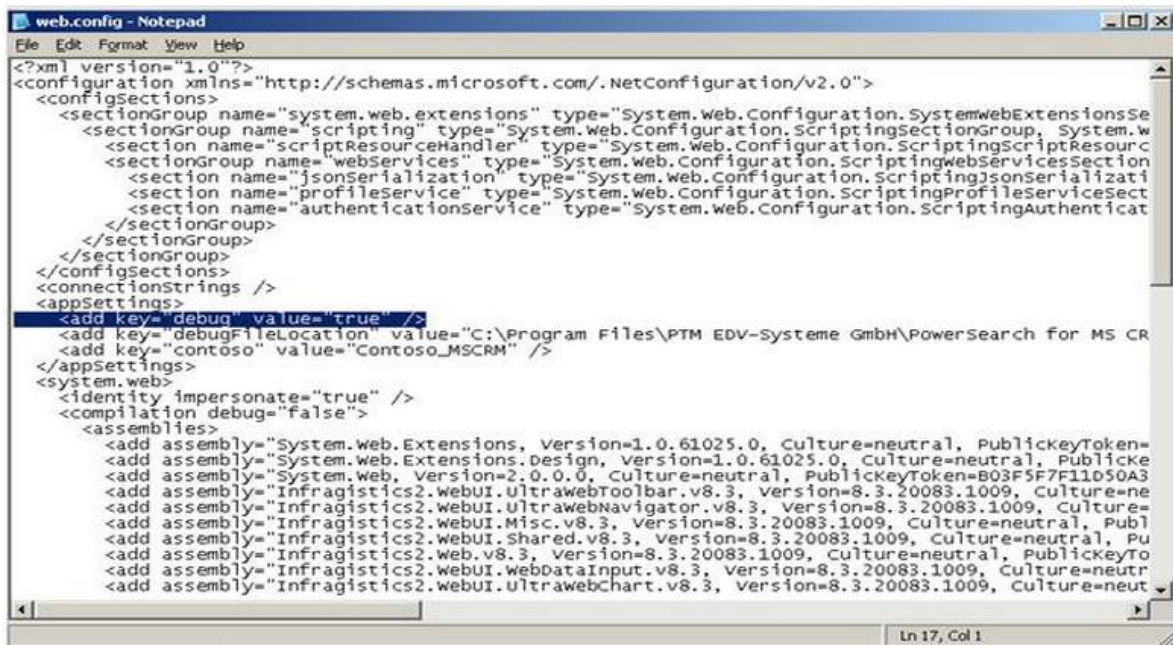
Default signature (Editing available to administrators):
 Default signature

5 How to activate debugging for ActivityTools

Basically, there is one way to activate debugging: Activating debugging via the Web.config

Solution: Open the Web.config. This file is located in the installation directory.

Now open the Web.config with the notepad and search for the "debug" setting and set this value to "true".



```

web.config - Notepad
File Edit Format View Help
<?xml version="1.0"?>
<configuration xmlns="http://schemas.microsoft.com/.NetConfiguration/v2.0">
  <configSections>
    <sectionGroup name="system.web.extensions" type="System.Web.Configuration.SystemWebExtensionsSe
    <sectionGroup name="scripting" type="System.Web.Configuration.ScriptingSectionGroup, System.w
    <section name="scriptResourceHandler" type="System.Web.Configuration.ScriptingScriptResourc
    <sectionGroup name="webServices" type="System.Web.Configuration.ScriptingwebServicesSection
    <section name="jsonSerialization" type="System.Web.Configuration.ScriptingJsonSerializati
    <section name="profileService" type="System.Web.Configuration.ScriptingProfileServiceSect
    <section name="authenticationService" type="System.Web.Configuration.ScriptingAuthenticat
  </sectionGroup>
</sectionGroup>
</configSections>
<connectionStrings />
<appSettings>
  <add key="debug" value="true" />
  <add key="debugFileLocation" value="C:\Program Files\PTM EDV-Systeme GmbH\PowerSearch for MS CR
  <add key="contoso" value="Contoso_MSCRM" />
</appSettings>
<system.web>
  <identity impersonate="true" />
  <compilation debug="false">
    <assemblies>
      <add assembly="System.Web.Extensions, Version=1.0.61025.0, Culture=neutral, PublicKeyToken=
      <add assembly="System.Web.Extensions.Design, Version=1.0.61025.0, Culture=neutral, Publicke
      <add assembly="System.Web, Version=2.0.0.0, Culture=neutral, PublicKeyToken=B03F5F7F11050A3
      <add assembly="Infragistics2.WebUI.UltraWebToolBar.v8.3, Version=8.3.20083.1009, Culture=ne
      <add assembly="Infragistics2.WebUI.UltraWebNavigator.v8.3, Version=8.3.20083.1009, Culture=
      <add assembly="Infragistics2.WebUI.Misc.v8.3, Version=8.3.20083.1009, Culture=neutral, Publ
      <add assembly="Infragistics2.WebUI.Shared.v8.3, Version=8.3.20083.1009, Culture=neutral, Pu
      <add assembly="Infragistics2.Web.v8.3, Version=8.3.20083.1009, Culture=neutral, Publickeyto
      <add assembly="Infragistics2.WebUI.WebDataInput.v8.3, Version=8.3.20083.1009, Culture=neutr
      <add assembly="Infragistics2.WebUI.UltraWebChart.v8.3, Version=8.3.20083.1009, Culture=neut
    </assemblies>
  </compilation>
</system.web>
  </identity>
</system.web>
</configuration>
Ln 17, Col 1
  
```

Only enable debugging when you have to send us the debug files. Disable it by setting the value to "false".

6 Contact

If you have questions to the product send an Email to support@mscrm-addons.com or visit our blog <http://blogs.mscrm-addons.com>

PTM EDV-Systeme GmbH
 Bahnhofgürtel 59
 A-8020 Graz, Austria

Tel US +1 404.720.6066
 Tel Austria +43 316 680-880-0
 Fax +43 316 680-880-25
www.ptm-edv.at
www.mscrm-addons.com