ActivityTools
for Microsoft Dynamics CRM

ActivityTools

As the gatekeeper for customer interaction Activities are key in every CRM system.

Goal: Simplify activity handling inside Dynamics CRM
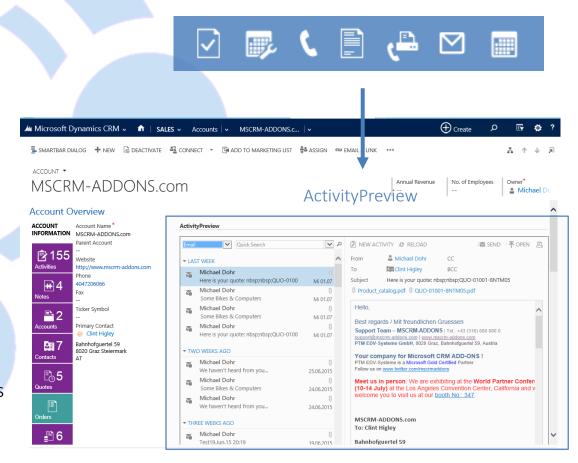
Why would I use it?

Increase productivity by providing tools to handle activities more efficiently

- **Visualization**
  - Outlook like view of activities
  - Quick and Advanced Search
  - All activity-types supported (including custom activities)

- **Email Features**
  - Define personal email signatures
    - HTML or Plain Text
  - Define default signatures/senders

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Activity-Preview

1. **Overview (Left Pane, marked red)**
   - List of activities (standard & custom)
   - Search capabilities

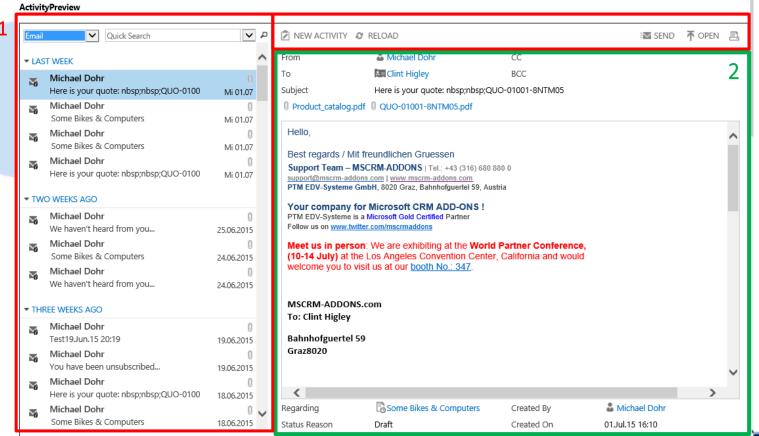2. **Preview (Right Pane, marked green)**
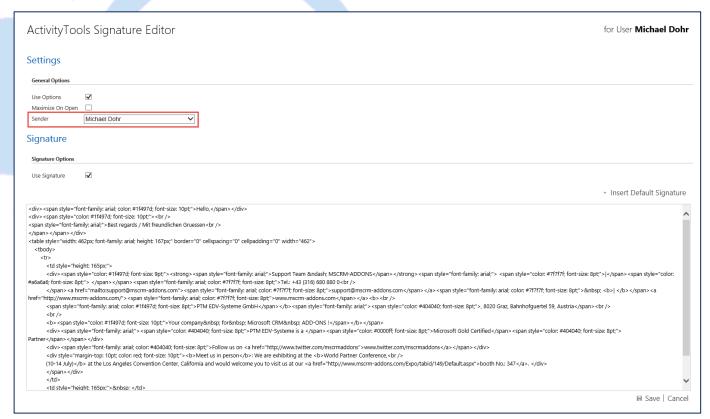   - Direct access to attachments and related records (from,to,cc,bcc…)
   - Customizable layout

Email Features

- **Signature Editor (Accessible on CRM User Form)**
  - Create personalized signatures for Users or Teams. (Plain Text and HTML supported)
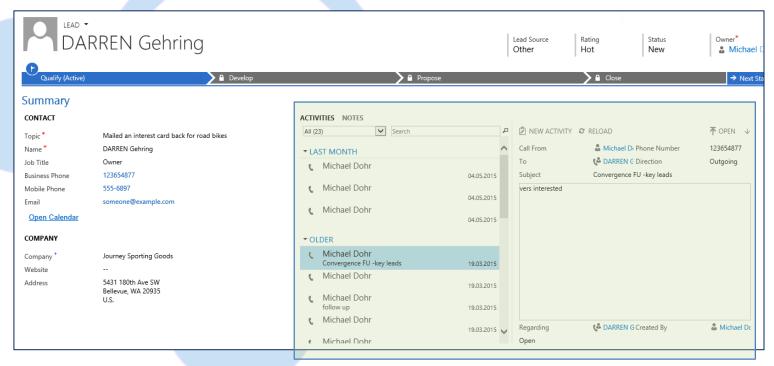 - Define default senders (Support or Sales teams)

How to Deploy to CRM

ActivityTools can simply be deployed to CRM Forms, the SocialPane or added to the NavBar by referencing the „**ptm_ActvitiyTools/Mainpage.html**" webresource

- **Embed into Entity Forms or Social Pane**

- **Embed into CRM NavBar**

Thank You

Feel free to join our upcoming Webinars!
http://www.mscrm-addons.com/Support/Webinars.aspx

Resources:

- You can find us on the web at http://www.mscrm-addons.com

- Help-Center (Live-Chat, Support): http://www.mscrm-addons.com/Support.aspx

- Don't forget we have an awesome blog at http://blogs.mscrm-addons.com/, you'll find it to be a helpful resource!

Contact:

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