



EmailSignature for MS CRM 3

Users's Guide

(How to use EmailSignature for MS CRM 3)

Table of Contents

1	WELCOME	3
2	USER'S GUIDE	4
2.1	Introduction	4
2.2	The signature window	5
2.3	The email window	6
2.4	Creating a default signature	7
3	CONTACT	8

1 Welcome

Welcome to the help for **EmailSignature for MS CRM 3**. This document will show you the functionality and features of the EmailSignature.

If you need to reach us, see the Contact page

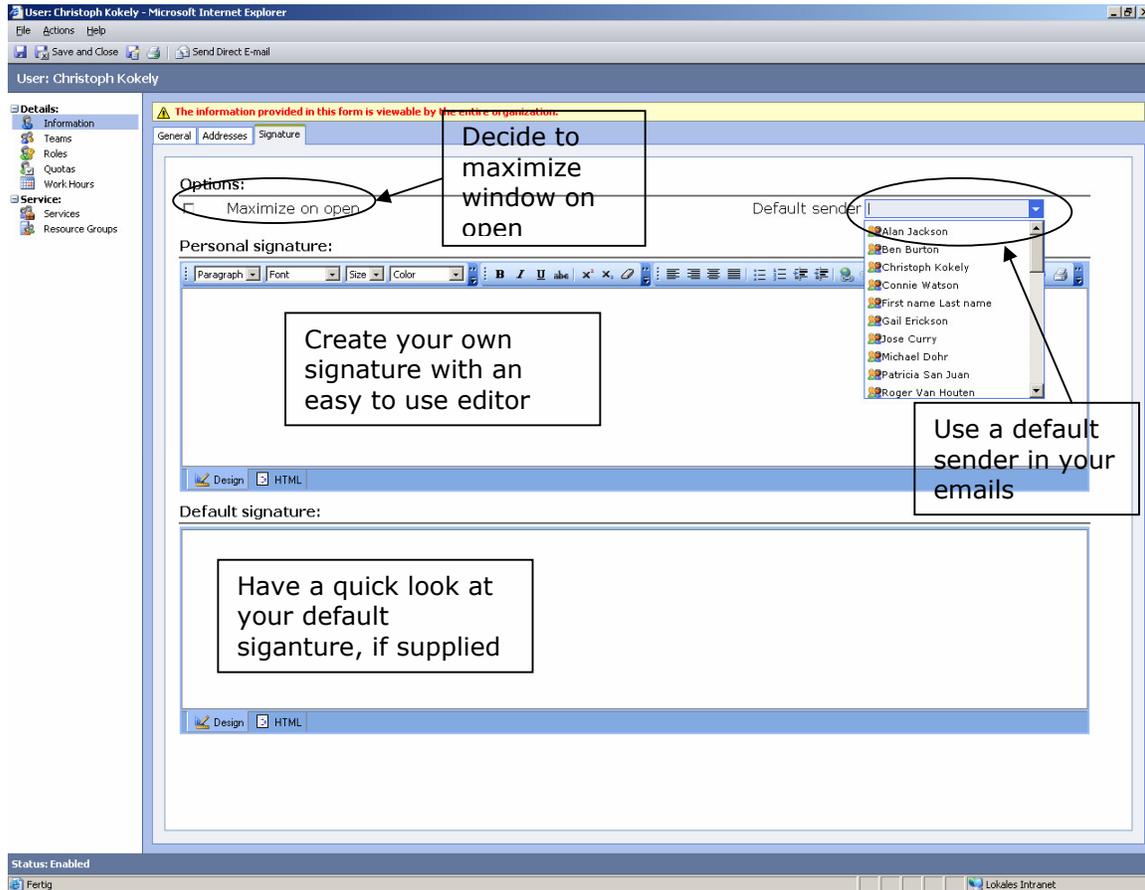
2 User's Guide

2.1 *Introduction*

EmailSignature is an enhancement for Microsoft CRM 3 that is designed to provide an email signature feature and a default sender for Microsoft CRM 3.0 mail

The product enables you to have Microsoft CRM 3.0 mails automatically supplied with either a personal signature or a default signature and have a sender ID prefilled into the mail form.

2.2 The signature window

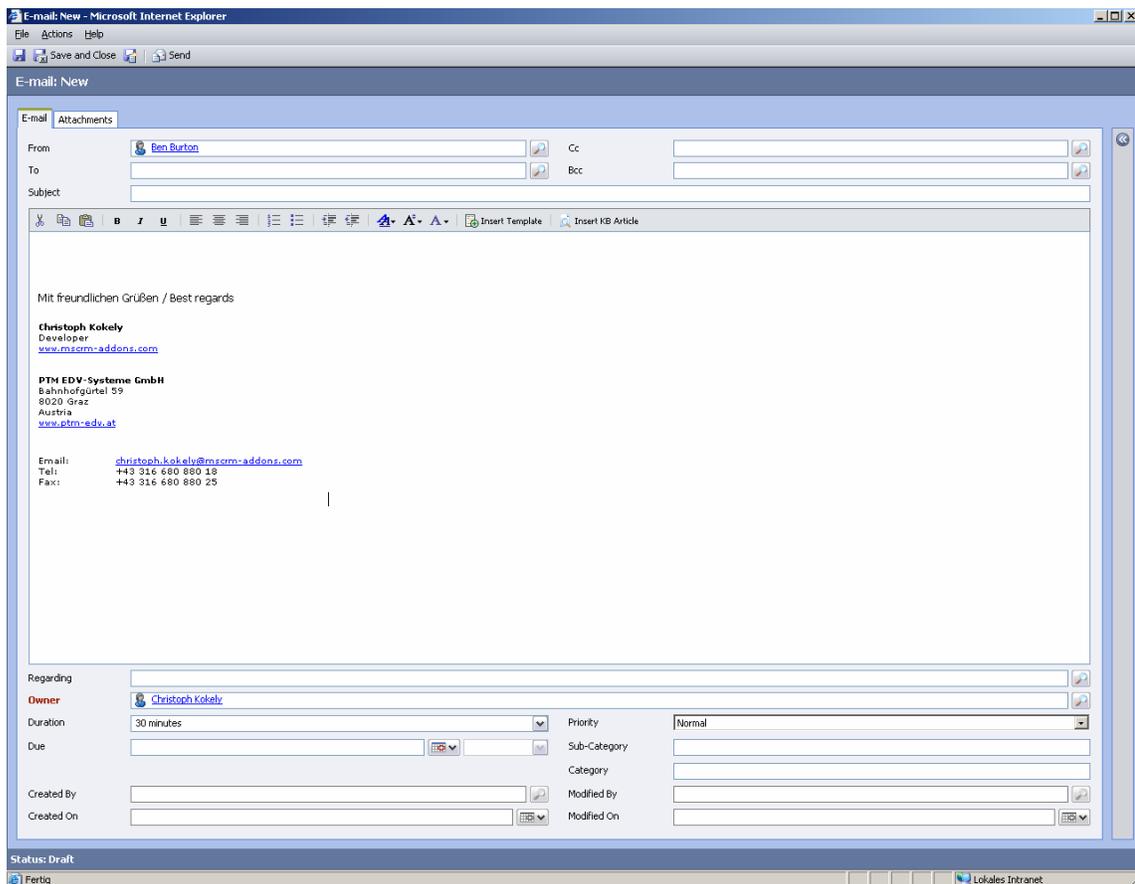


In this window you can have a look at your default signature, which is fully accessible to accelerate the creation of your own signatures in either plaintext or directly in HTML.

The default sender offers a dropdown list of all users and queues accessible to you.

Checking the "Maximize on open" feature makes the e-mail window fullscreen, when opened.

2.3 The email window



Having provided the required information, the Microsoft CRM 3.0 Email window opens fullscreen, and is supplied with the default sender and the signature desired.

If no personalized settings and signatures are provided, EmailSignature for MS CRM 3.0 uses a default signature and setting.

2.4 Creating a default signature

The default settings and signatures must be located in the folder "ptmscripts" inside your MS CRM 3.0 directory.

The files are named "settings_.aspx" and "signature_.aspx". These files do not exist by default.

The easiest way to supply a default signature and default settings is to create a personal signature and settings file and then rename it to the filenames mentioned above.

If you decide to create the files manually, the following rules apply:

The "settings_.aspx" – file must have the following structure:

```
<maximizeWindow=True>  
<defaultSender={2283F7E4-9D61-DA11-8F5C-0003FF71453B}>  
<senderType=8>  
<senderName=Connie Watson>
```

- maximizeWindow
Can be True or False
- defaultSender
The MS CRM 3.0 Guid of the desired user
- senderType
The MS CRM 3.0 objectType of the used sender (e.g. 8 for systemusers, or 2020 for queues)
- senderName
The MS CRM 3.0 Name of the sender

The "signature_.aspx" file can be of any html – interpretable content.

The lines

```
<defaultSender={2283F7E4-9D61-DA11-8F5C-0003FF71453B}>  
<senderType=8>  
<senderName=Connie Watson>
```

represent a mandatory section. If you do not want a default sender, omit this section, leaving your "settings_.aspx"-file like this:

```
<maximizeWindow=True>
```

3 Contact

If you have questions to the product send a Email to
support@mscrm-addons.com

PTM EDV-Systeme GmbH,
Wienerstrasse 186a,
A-8051 Graz, Austria

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