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ActivityTools for MS CRM 2013

ActivityTools for MS CRM 2013

Version 6.3, October 2013

User Guide

(How to use ActivityTools for MS CRM 2013)

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1 User Guide

This guide gives detailed explanations of all functionalities provided by **ActivityTools for MS CRM 2013**.

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...).

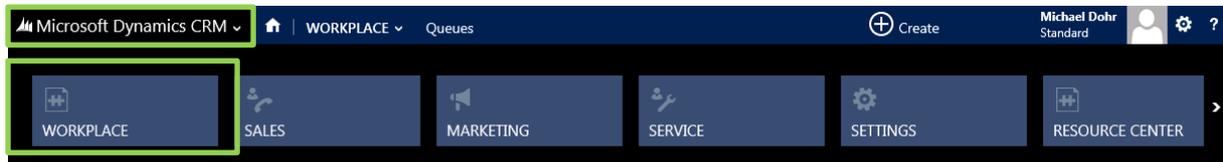
Both views provide additional "Grouping"- and "Search"-features that can be adapted to fit user-specific requirements.

Email-features:

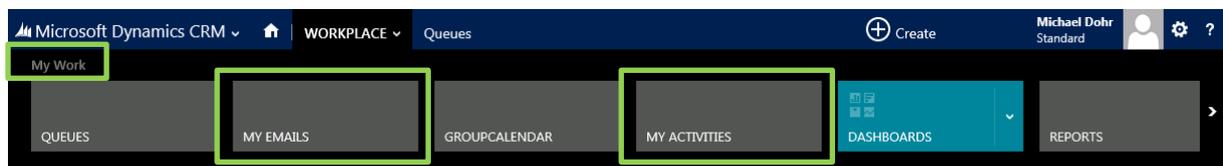
- Default signatures: With only a few steps you can generate a default email-signature for all your users. Such standard signatures help to get a uniform email layout within MS CRM. This signature will automatically be added to new emails, forwarded emails and to emails you reply to.
- Set a standard 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. To get there click on "Microsoft Dynamics CRM" and next on "Workplace" in the ribbon. See next screenshots:

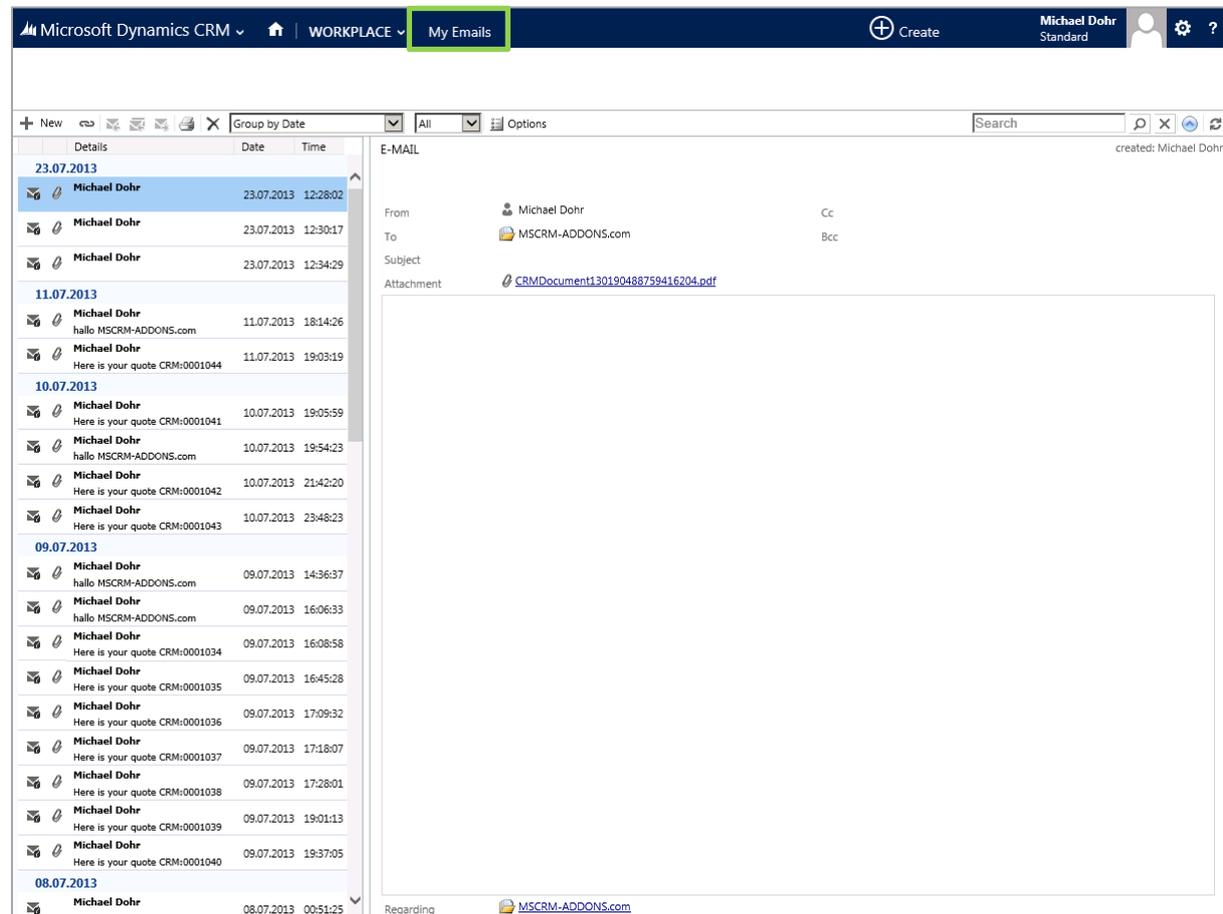


Under "My Work" you can see the different views provided by ActivityTools for MS CRM 2013:



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

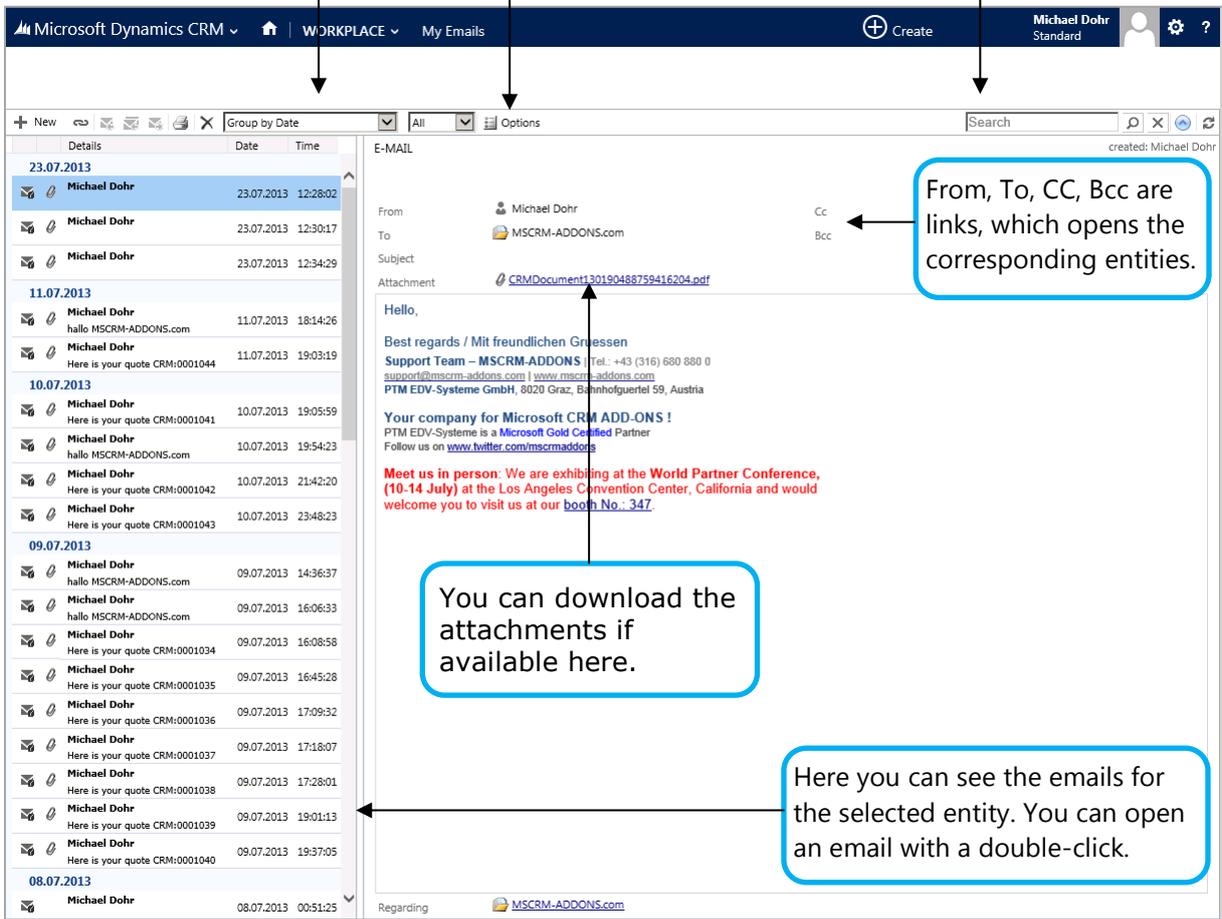


3.1.1 The view of "My Emails"

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



The screenshot shows the Microsoft Dynamics CRM interface for the 'My Emails' view. The top navigation bar includes 'Microsoft Dynamics CRM', 'WORKPLACE', 'My Emails', and a 'Create' button. The user 'Michael Dohr' is logged in. The main area is divided into a left sidebar with an email list and a right pane showing the details of a selected email. The email list is grouped by date, with dates like 23.07.2013, 11.07.2013, 10.07.2013, 09.07.2013, and 08.07.2013. The selected email is from Michael Dohr to MSCRM-ADDONS.com, with a subject 'CRMDocument130190488759416204.pdf'. The email body contains a greeting, contact information for the support team, and a notice about a conference. Annotations with arrows point to various parts of the interface: 'Options' in the top bar, the search box, the 'From', 'To', 'Cc', and 'Bcc' fields, the attachment link, and the email list.

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

You can download the attachments if available here.

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

EmailPreview-icons:

Pending send & draft



23.07.2013			
		Michael Dohr	23.07.2013 12:28:02
		Michael Dohr	23.07.2013 12:30:17

Outgoing emails

This indicates an attachment within the email.



23.07.2013			
		Michael Dohr	23.07.2013 12:28:02
		Michael Dohr	23.07.2013 12:30:17

Incoming emails

3.1.2 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 2013

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

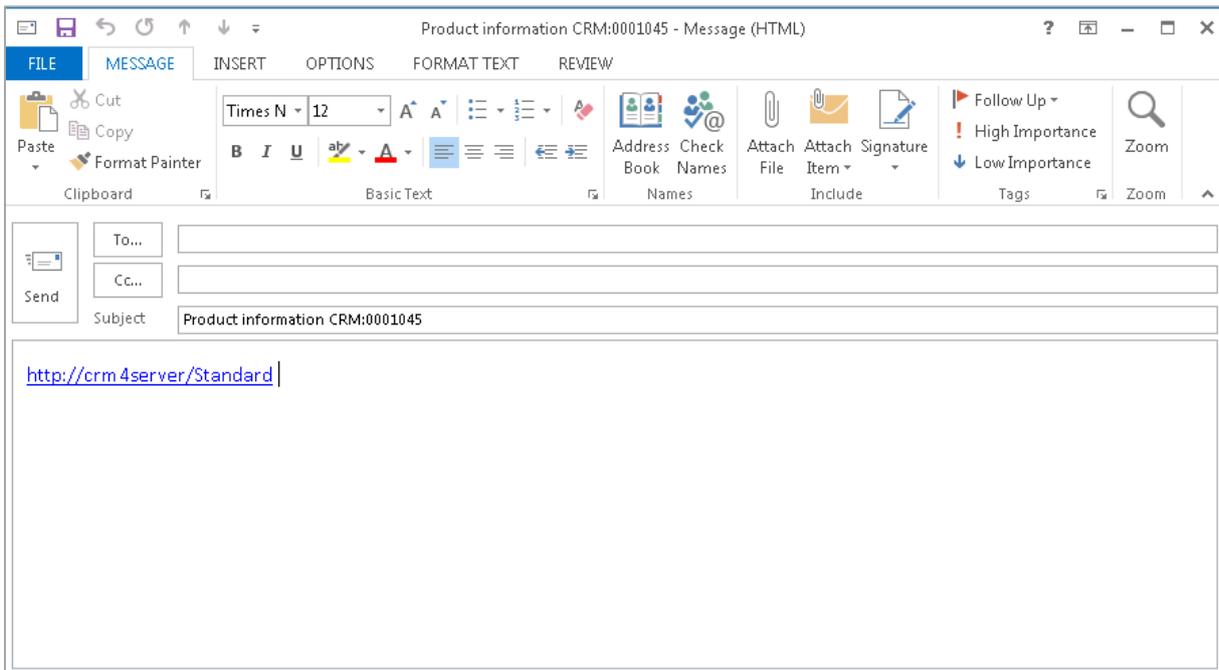
OK Close

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 as link:



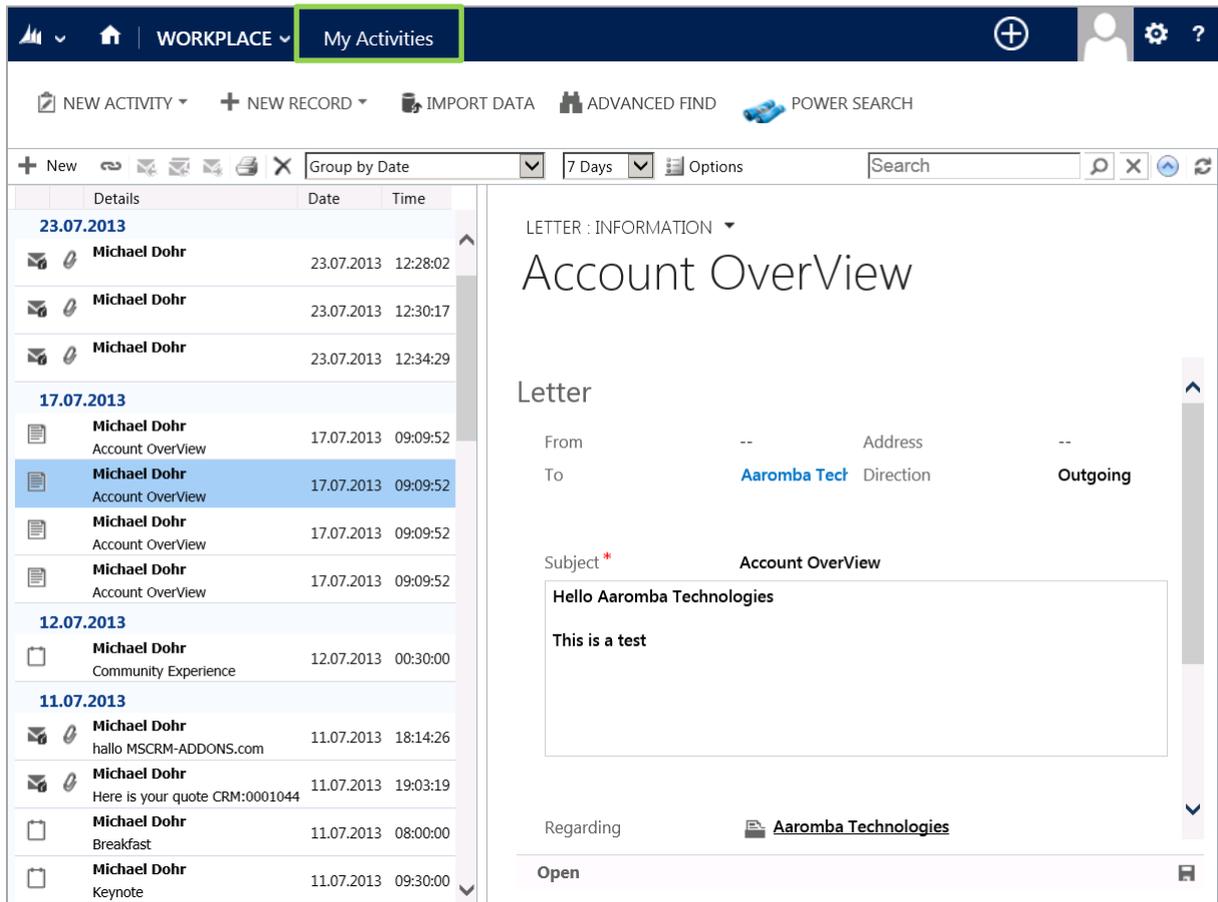
By previewing an email and pressing this button a new email will be created with the registered email client containing a CRM-link to the selected email in the content grid as displayed in the following screenshot:



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 screenshot displays the 'My Activities' window in MS CRM 2013. The top navigation bar includes 'WORKPLACE' and 'My Activities'. Below the navigation bar, there are options for 'NEW ACTIVITY', 'NEW RECORD', 'IMPORT DATA', 'ADVANCED FIND', and 'POWER SEARCH'. The main area is divided into two panes. The left pane shows a list of activities grouped by date, with columns for 'Details', 'Date', and 'Time'. The right pane shows a detailed view of a selected activity, which is a letter titled 'Account OverView'. The letter details include 'From', 'To', 'Subject', and 'Regarding'.

Details	Date	Time
23.07.2013		
Michael Dohr	23.07.2013	12:28:02
Michael Dohr	23.07.2013	12:30:17
Michael Dohr	23.07.2013	12:34:29
17.07.2013		
Michael Dohr Account OverView	17.07.2013	09:09:52
Michael Dohr Account OverView	17.07.2013	09:09:52
Michael Dohr Account OverView	17.07.2013	09:09:52
Michael Dohr Account OverView	17.07.2013	09:09:52
12.07.2013		
Michael Dohr Community Experience	12.07.2013	00:30:00
11.07.2013		
Michael Dohr hallo MSCRM-ADDONS.com	11.07.2013	18:14:26
Michael Dohr Here is your quote CRM:0001044	11.07.2013	19:03:19
Michael Dohr Breakfast	11.07.2013	08:00:00
Michael Dohr Keynote	11.07.2013	09:30:00

Letter Details:

- LETTER : INFORMATION
- Account OverView**
- Letter
- From: -- Address: --
- To: Aaromba Tect Direction: Outgoing
- Subject: Account OverView
- Content: Hello Aaromba Technologies
This is a test
- Regarding: Aaromba Technologies
- Open

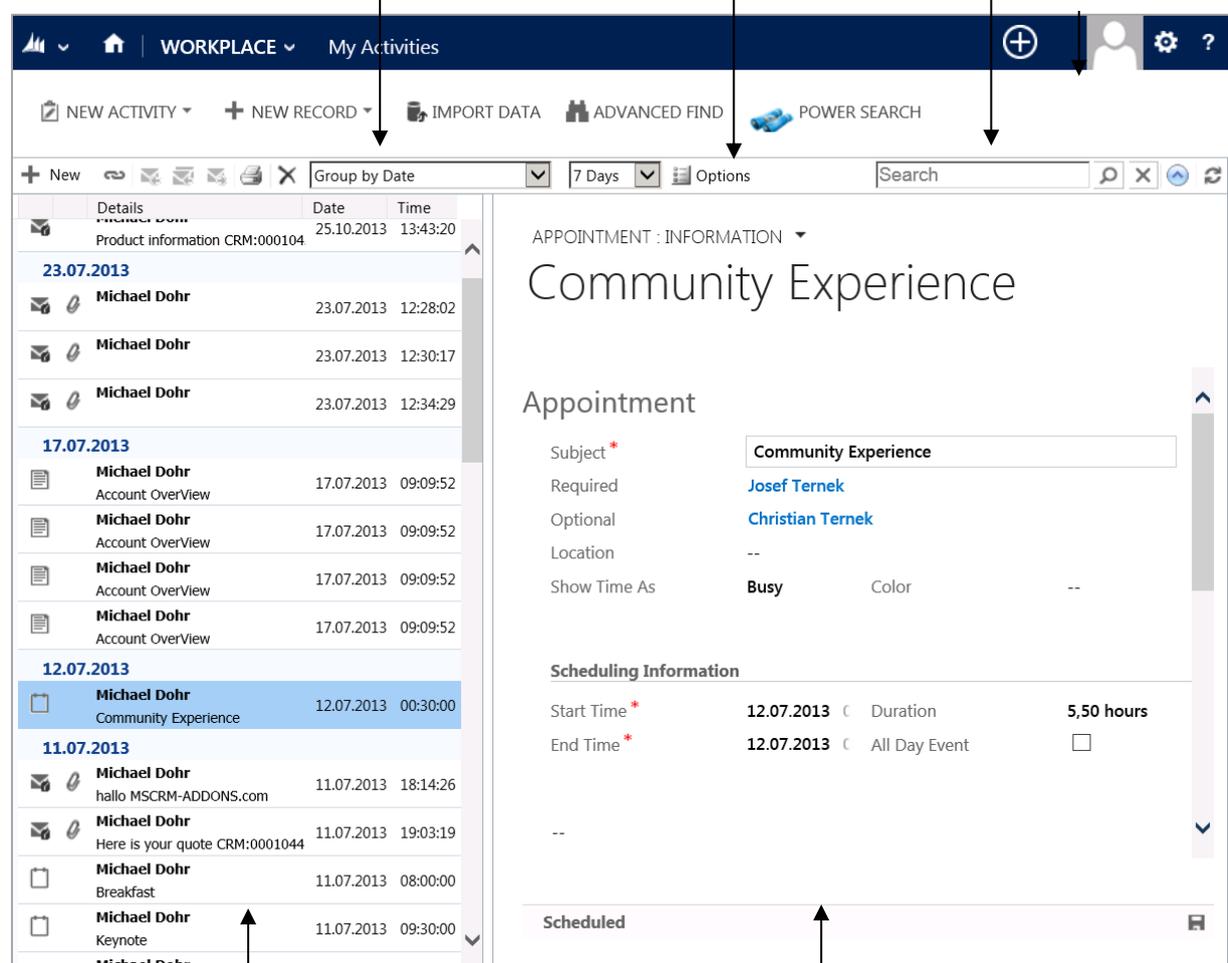
3.2.1 The "My Activities" view:

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

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.

Here you can filter the activities by reference date.

The "Search"-feature enables users to search through activities depending on the configuration.



	Details	Date	Time
	Product information CRM:000104	25.10.2013	13:43:20
23.07.2013			
	Michael Dohr	23.07.2013	12:28:02
	Michael Dohr	23.07.2013	12:30:17
	Michael Dohr	23.07.2013	12:34:29
17.07.2013			
	Michael Dohr Account OverView	17.07.2013	09:09:52
	Michael Dohr Account OverView	17.07.2013	09:09:52
	Michael Dohr Account OverView	17.07.2013	09:09:52
	Michael Dohr Account OverView	17.07.2013	09:09:52
12.07.2013			
	Michael Dohr Community Experience	12.07.2013	00:30:00
11.07.2013			
	Michael Dohr hallo MSCRM-ADDONS.com	11.07.2013	18:14:26
	Michael Dohr Here is your quote CRM:0001044	11.07.2013	19:03:19
	Michael Dohr Breakfast	11.07.2013	08:00:00
	Michael Dohr Keynote	11.07.2013	09:30:00
	Michael Dohr		

List of activities: Here you can see the activities for the selected entity. Any record can be opened with a double click.

Preview of the currently selected activity.

3.2.2 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 2013

Select the entities you would like to include

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

1

Select the fields, you would like to run search for

- Subject
- Description

2

Select the default view settings

Default View:

Filter by age:

Items per Page:

3

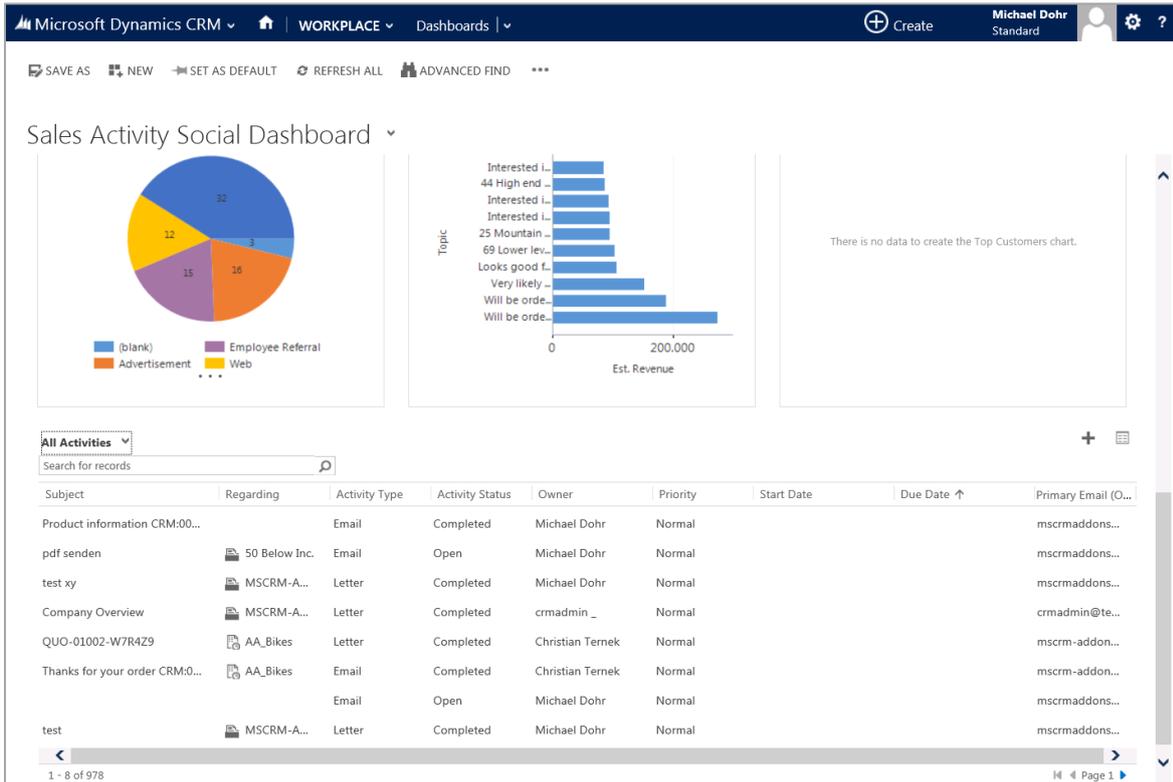
OK Close

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

3.3 Embed previews into CRM Dashboards

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

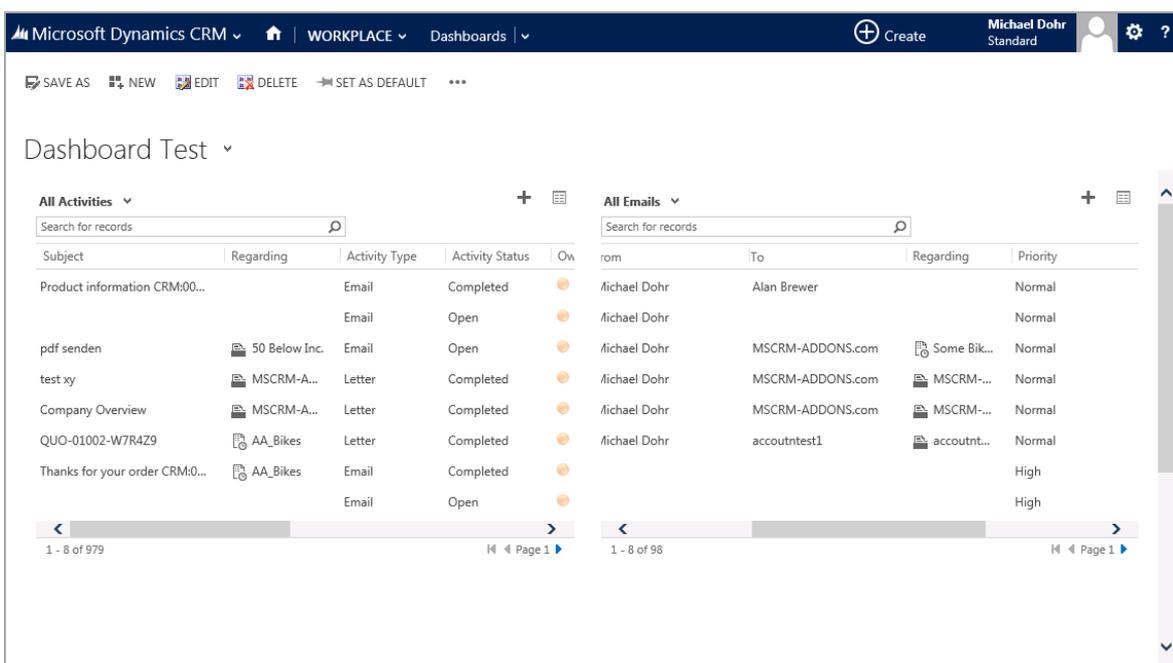
Depending on your configuration, it is possible to show one or multiple previews in one dashboard. (See screenshots below)



The screenshot shows a CRM dashboard with the following components:

- Navigation:** Microsoft Dynamics CRM, WORKPLACE, Dashboards, Create, Michael Dohr Standard.
- Tools:** SAVE AS, NEW, SET AS DEFAULT, REFRESH ALL, ADVANCED FIND.
- Charts:**
 - Pie Chart:** Shows activity sources: (blank) 32, Advertisement 12, Employee Referral 15, Web 16, and another category with 3.
 - Horizontal Bar Chart:** Shows 'Est. Revenue' by topic. Topics include 'Interested in...', '44 High end...', '25 Mountain...', '69 Lower lev...', 'Looks good f...', 'Very likely...', 'Will be orde...', and 'Will be orde...'.
 - Placeholder:** 'There is no data to create the Top Customers chart.'
- Table:** 'All Activities' table with columns: Subject, Regarding, Activity Type, Activity Status, Owner, Priority, Start Date, Due Date, Primary Email.

Subject	Regarding	Activity Type	Activity Status	Owner	Priority	Start Date	Due Date	Primary Email (O...
Product information CRM:00...		Email	Completed	Michael Dohr	Normal			mscrmaddons...
pdf senden	50 Below Inc.	Email	Open	Michael Dohr	Normal			mscrmaddons...
test xy	MSCRM-A...	Letter	Completed	Michael Dohr	Normal			mscrmaddons...
Company Overview	MSCRM-A...	Letter	Completed	crmadmin _	Normal			crmadmin@te...
QUO-01002-W7R4Z9	AA_Bikes	Letter	Completed	Christian Ternek	Normal			mscrm-addon...
Thanks for your order CRM:0...	AA_Bikes	Email	Completed	Christian Ternek	Normal			mscrm-addon...
test		Email	Open	Michael Dohr	Normal			mscrmaddons...
test	MSCRM-A...	Letter	Completed	Michael Dohr	Normal			mscrmaddons...



The screenshot shows a CRM dashboard with two tables side-by-side:

- Navigation:** Microsoft Dynamics CRM, WORKPLACE, Dashboards, Create, Michael Dohr Standard.
- Tools:** SAVE AS, NEW, EDIT, DELETE, SET AS DEFAULT.
- Table 1: All Activities**

Subject	Regarding	Activity Type	Activity Status	Own
Product information CRM:00...		Email	Completed	Michael Dohr
pdf senden	50 Below Inc.	Email	Open	Michael Dohr
test xy	MSCRM-A...	Letter	Completed	Michael Dohr
Company Overview	MSCRM-A...	Letter	Completed	Michael Dohr
QUO-01002-W7R4Z9	AA_Bikes	Letter	Completed	Michael Dohr
Thanks for your order CRM:0...	AA_Bikes	Email	Completed	Michael Dohr
		Email	Open	Michael Dohr
- Table 2: All Emails**

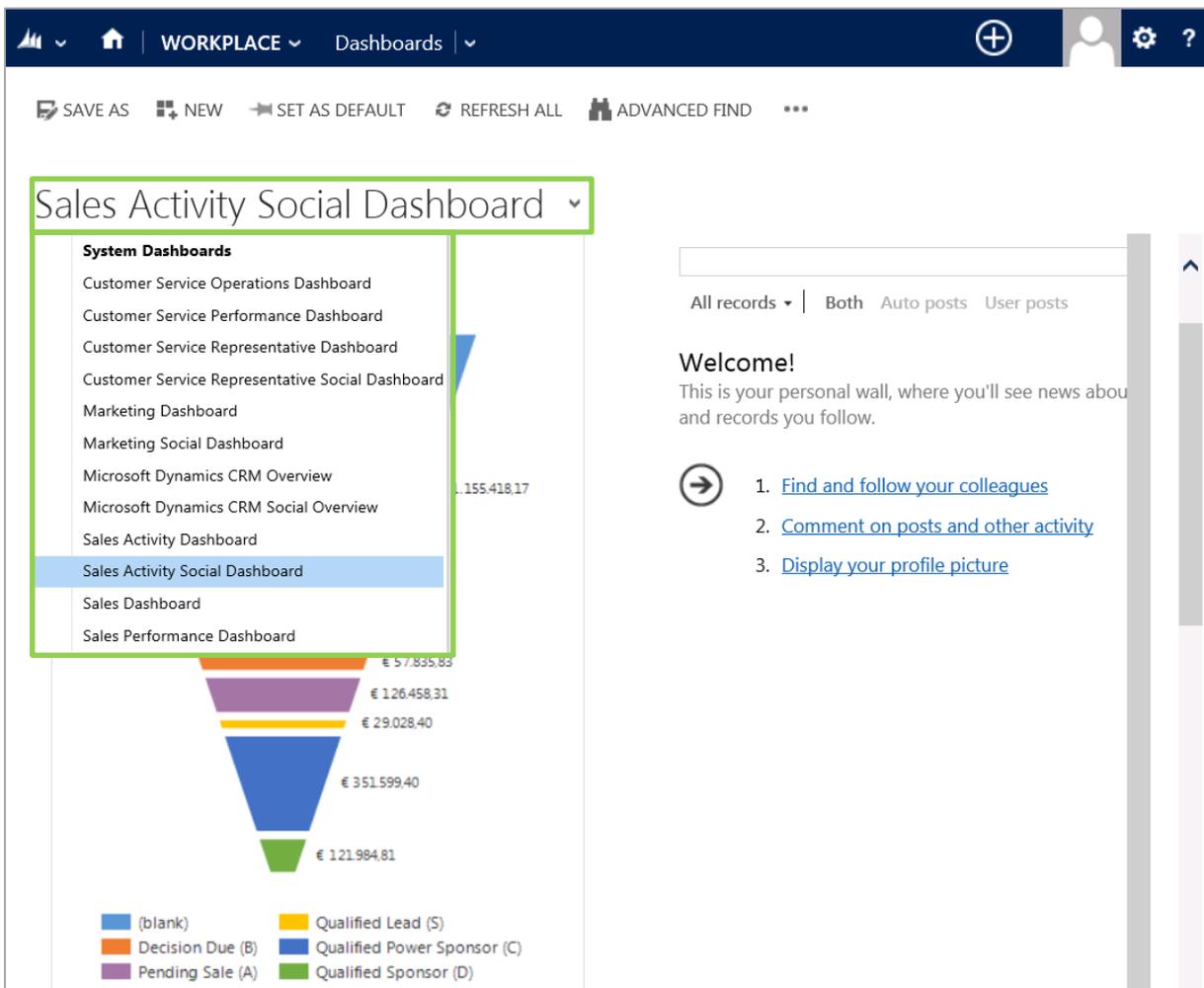
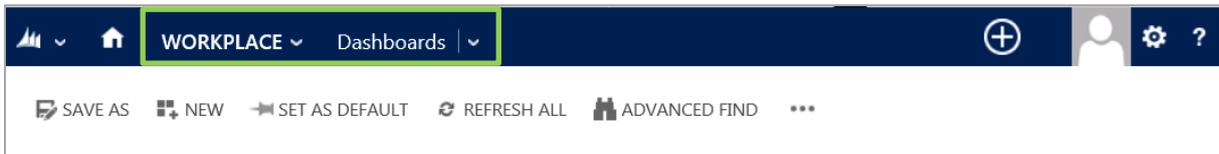
From	To	Regarding	Priority
Michael Dohr	Alan Brewer		Normal
Michael Dohr			Normal
Michael Dohr	MSCRM-ADDONS.com	Some Bik...	Normal
Michael Dohr	MSCRM-ADDONS.com	MSCRM-...	Normal
Michael Dohr	MSCRM-ADDONS.com	MSCRM-...	Normal
Michael Dohr	accountntest1	accountnt...	Normal
			High
			High

How to embed the previews into CRM Dashboards

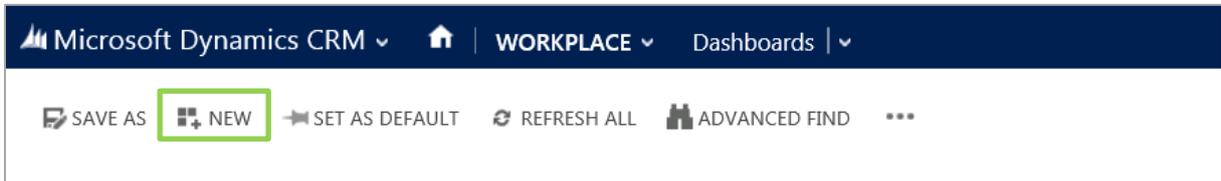
After you successfully installed the latest version of ActivityTools you are able configure your dashboard.

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

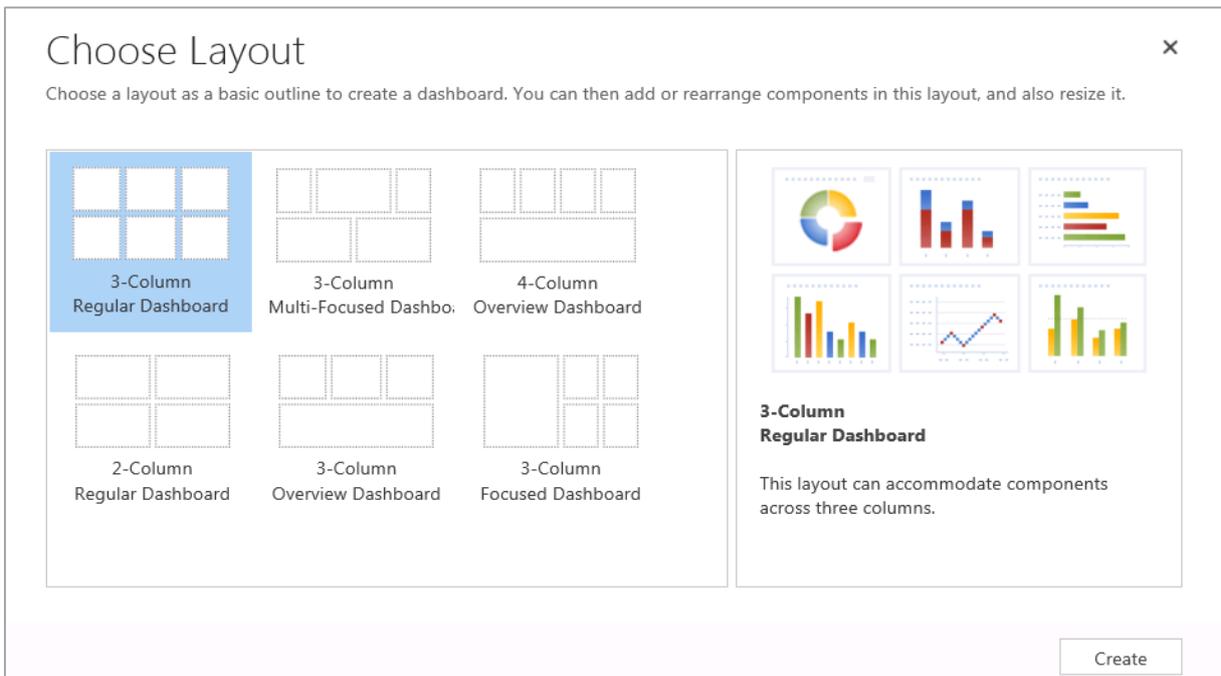
- If you already defined custom dashboards, choose the custom dashboard you want to edit from the "Dashboards" dropdown menu as shown below and click on "Edit" in the CRM menu on the top.



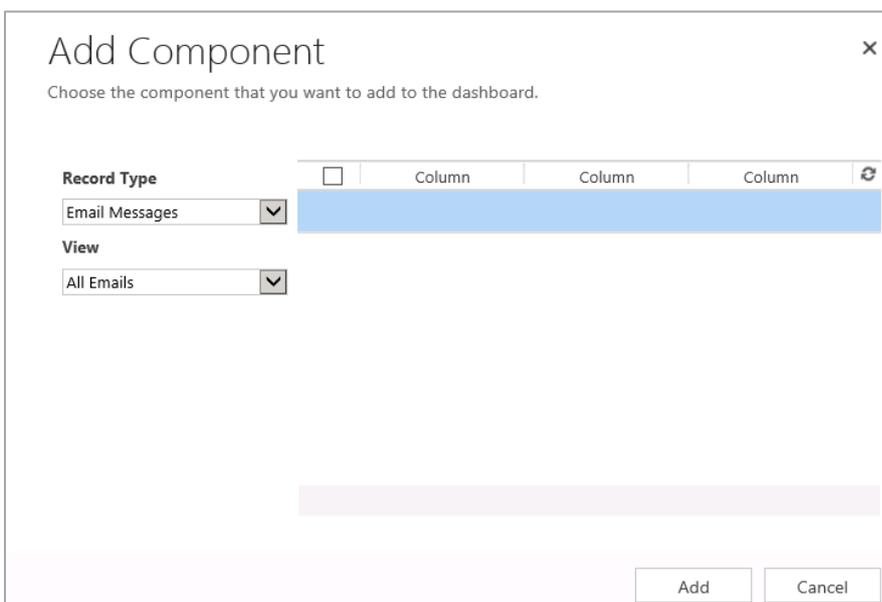
- If you would like to create a new custom dashboard, click on "New" in the CRM menu.



Enter a name for your dashboard in the dashboard-configuration-window.

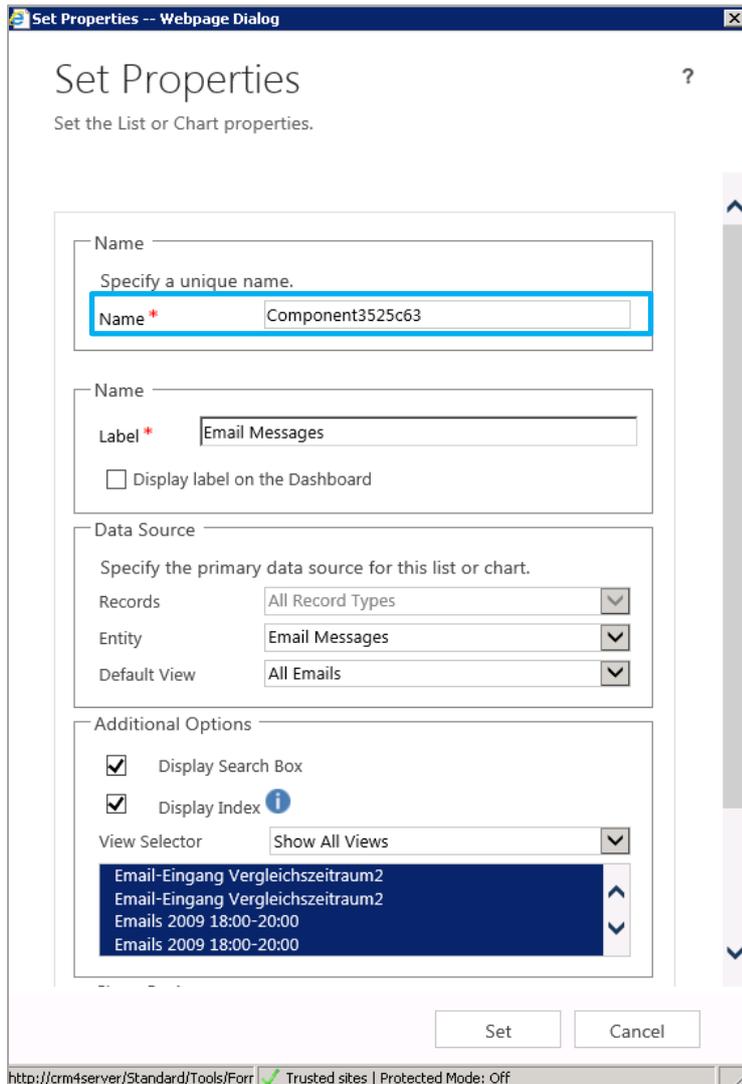


Select an empty grid and choose one of the insert possibilities. In our case we choose "List" and "Email Messages". See next screenshot:

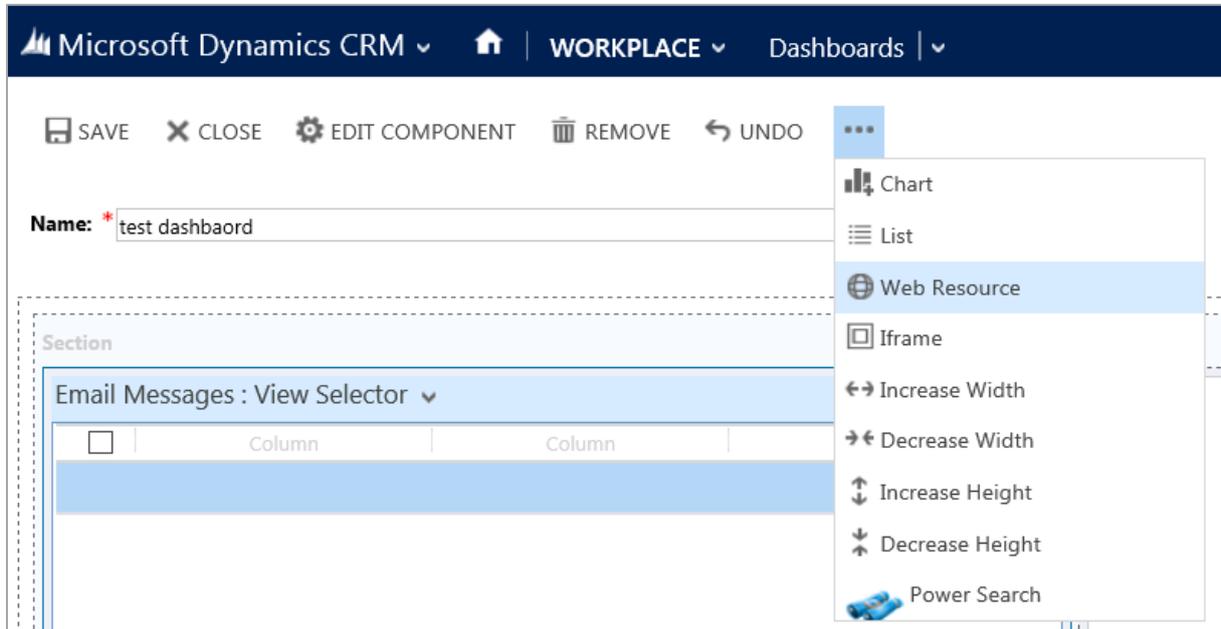


Next, you have to double-click on the grid in which you want the preview to be shown.

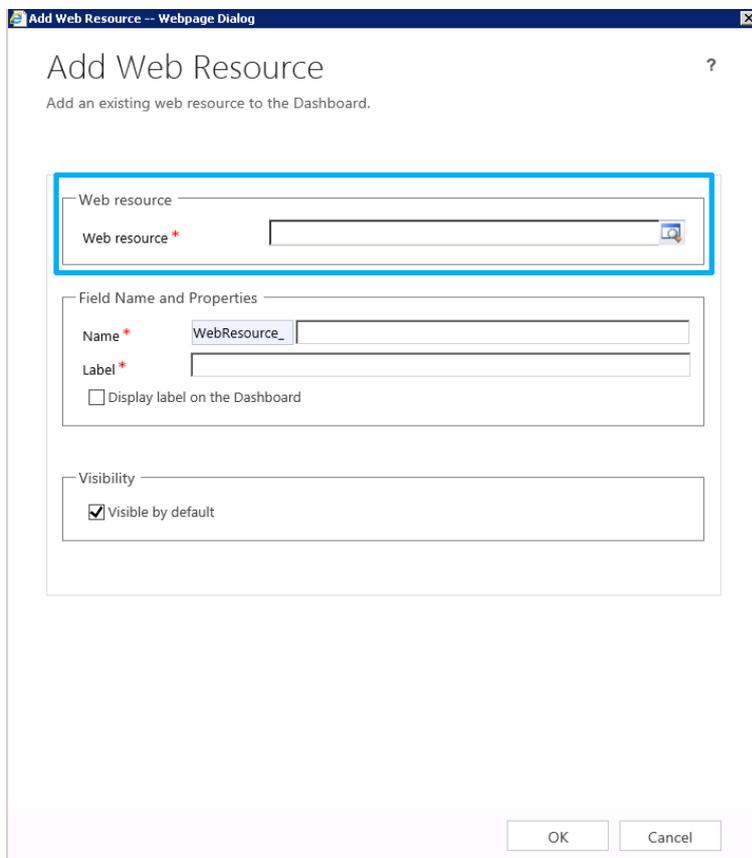
In our example, we double-click on "email Messages". Then, a new window appears with an important attribute called "Name". Copy the value of this attribute (see screenshot below) and write it down for later. Click on [Set] to close the window.



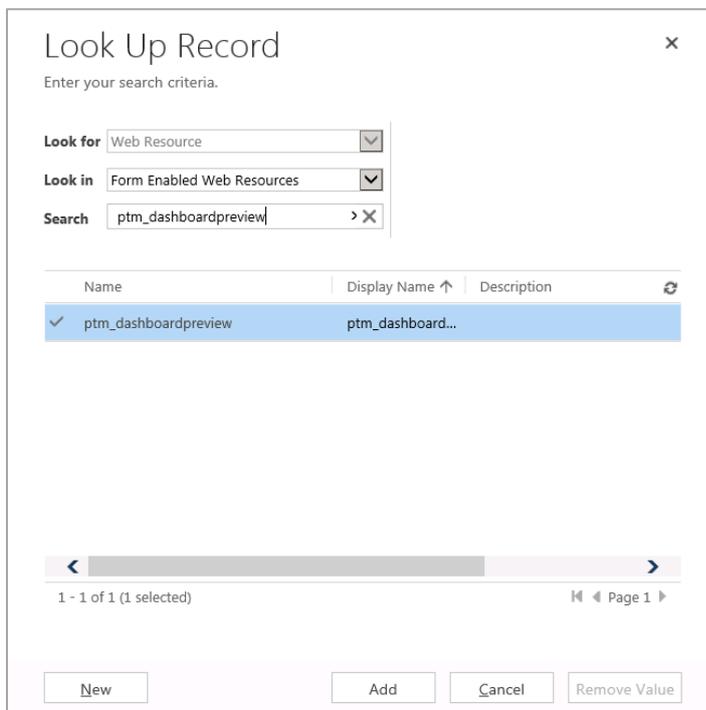
Afterwards, click on "Web Resource" in the CRM menu on the top to add a new web resource.



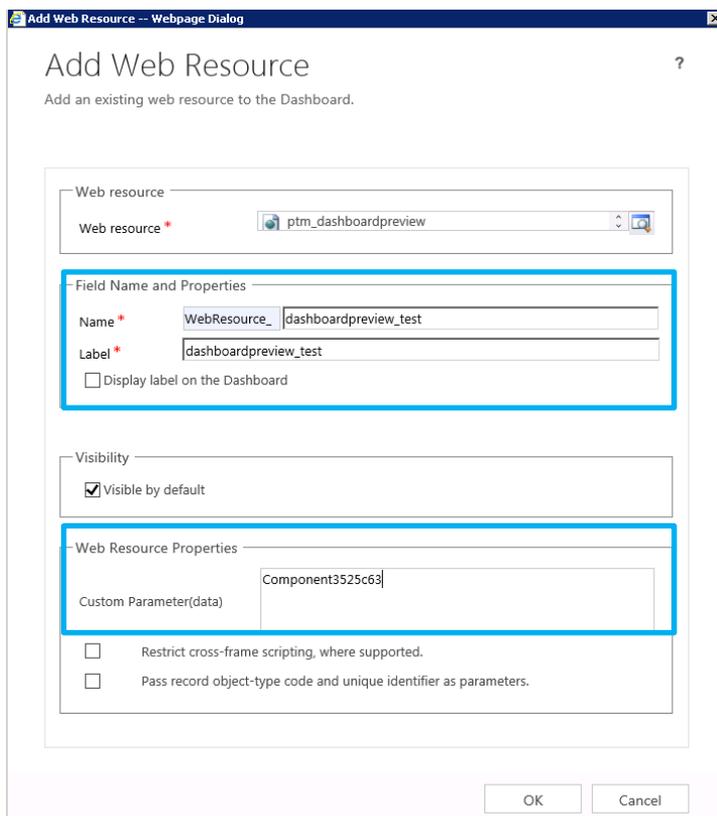
A new window appears called "Add Web Resource". In this window click on the LookUp-button to search for a web resource. (See screenshot below)



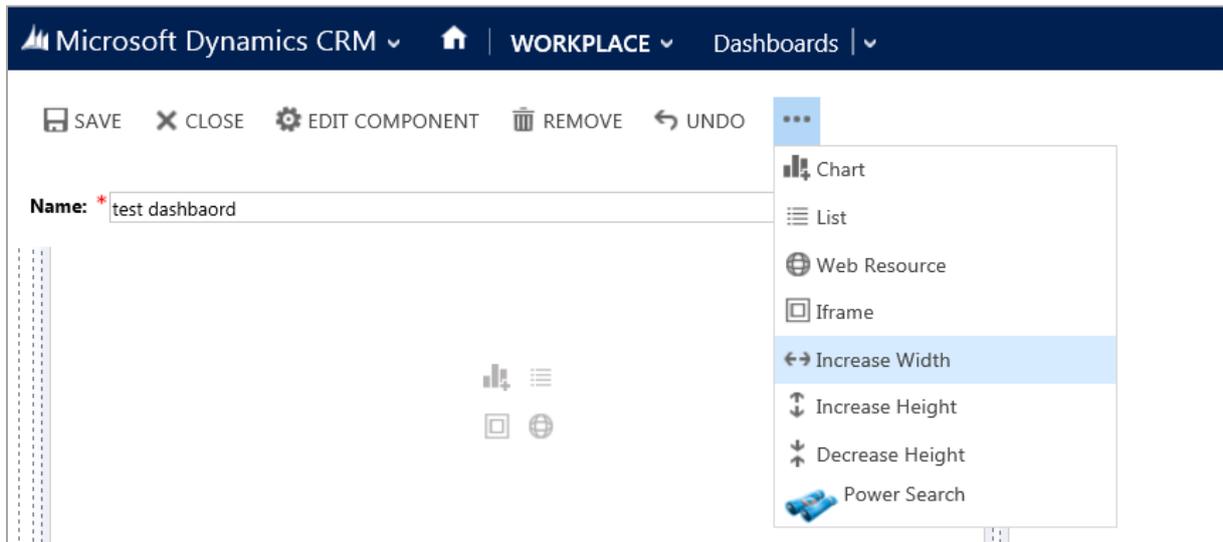
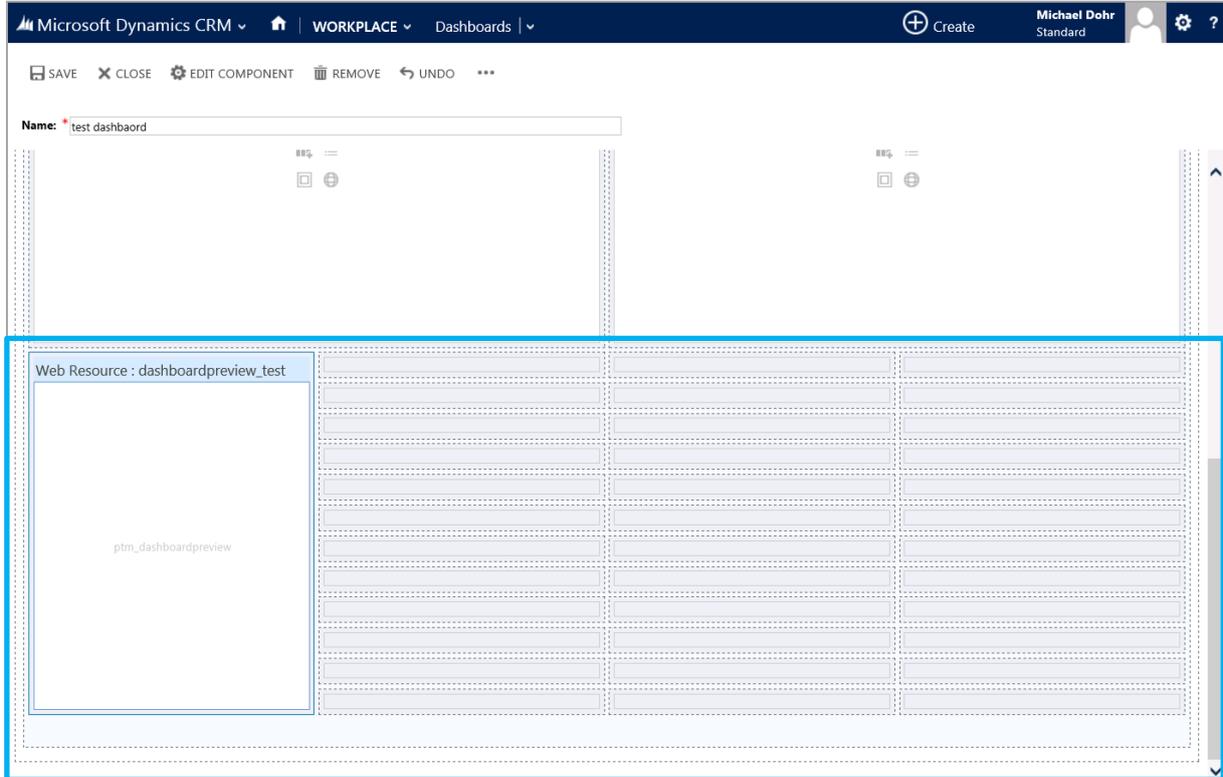
Click on "Look Up Record". Within this window, type "ptm_dashboardpreview" into the search field and search for it. There should be one exact match, select it and press [Add].



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].



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. See screenshots below:



4 Email Features

In this chapter we will take a look at the email features provided by ActivityTools for MS CRM 2013. Those are:

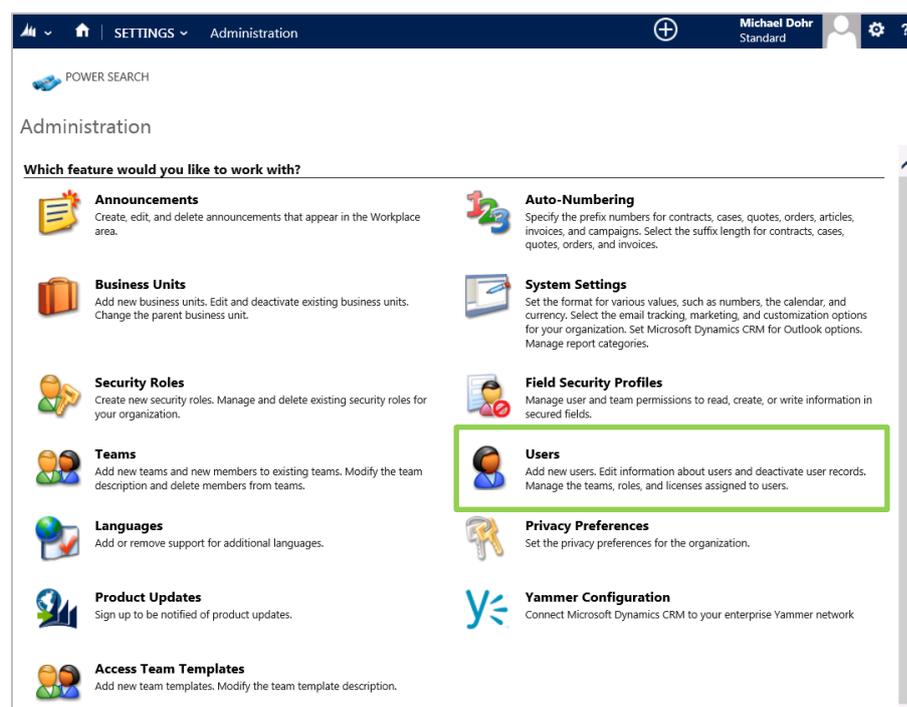
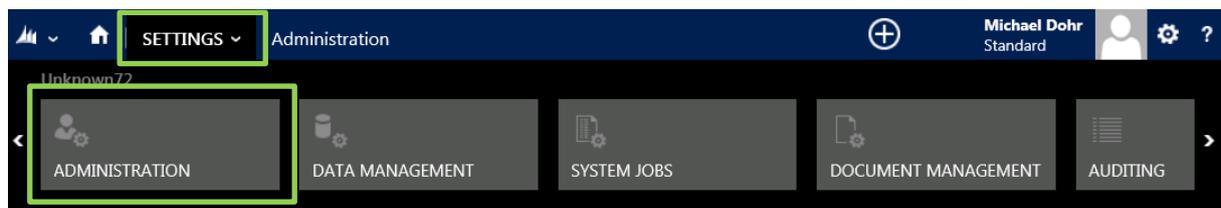
1. Defining default signatures
2. Use default sender
3. Define a personalized signature

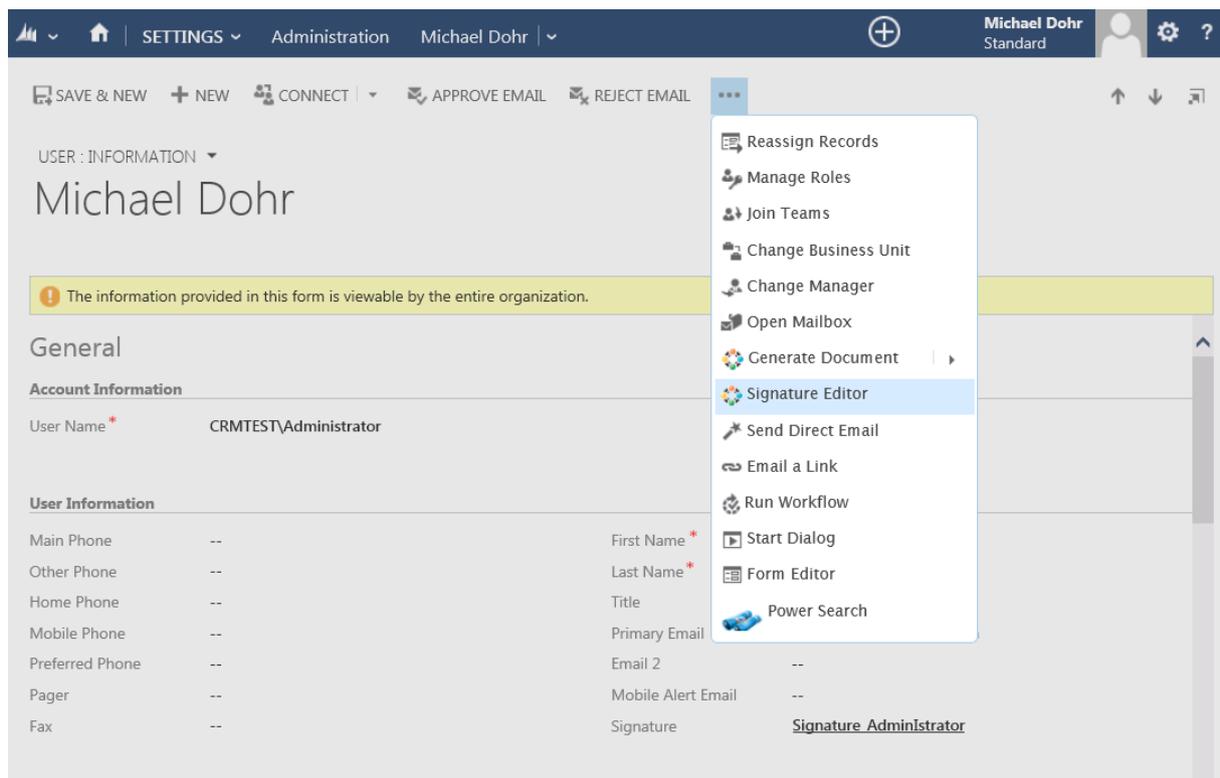
4.1 The Signature Editor

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.

To get to the "Signature Editor", open CRM go to Settings on the Ribbon/Administration/Users and select the required user. See screenshots below:





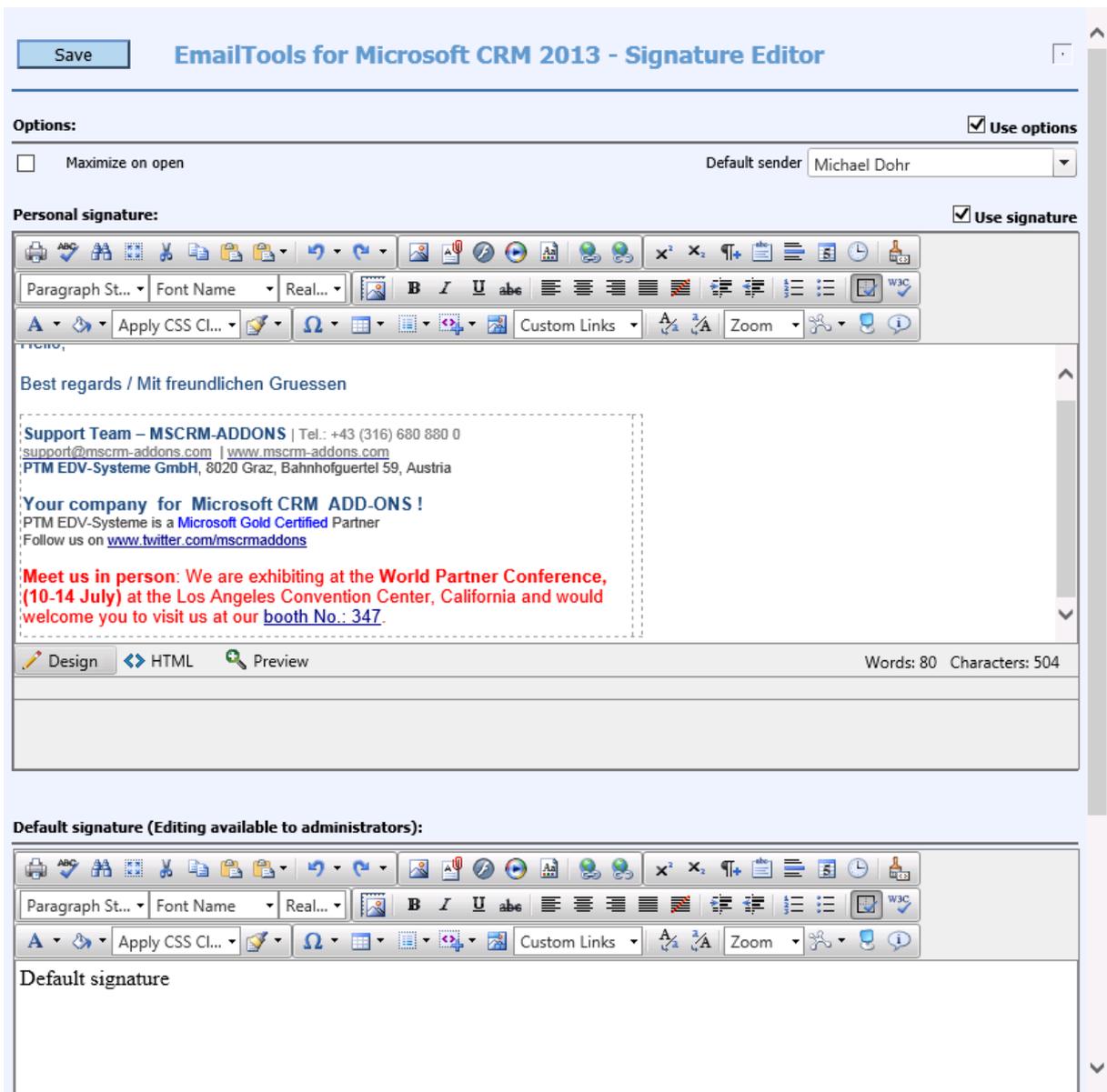
The screenshot above shows the selected user for which you want to create a signature for. Click on the "..." sign on the ribbon to get to the "Signature Editor". This action will open the "Signature Editor Window". See next chapter.

4.1.1 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.

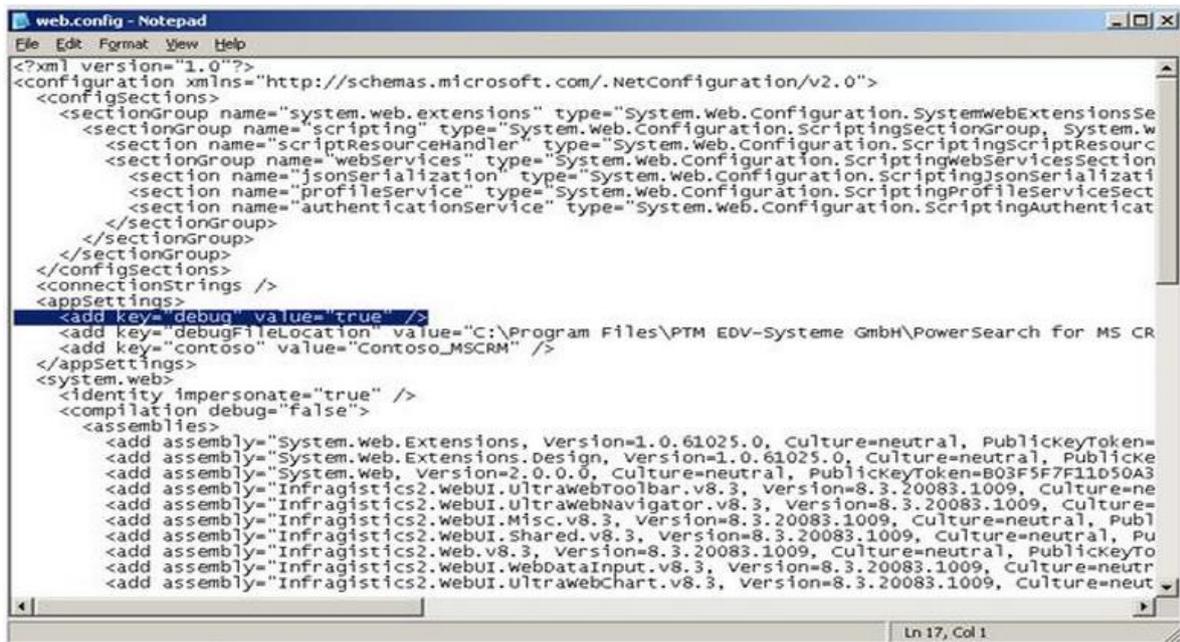


5 How to activate debugging for ActivityTools

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=neut
      <add assembly="Infragistics2.webUI.UltraWebChart.v8.3, Version=8.3.20083.1009, Culture=neut
    </assemblies>
  </compilation>
</system.web>
</configuration>
```

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>

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