

ActivityTools – Getting Started

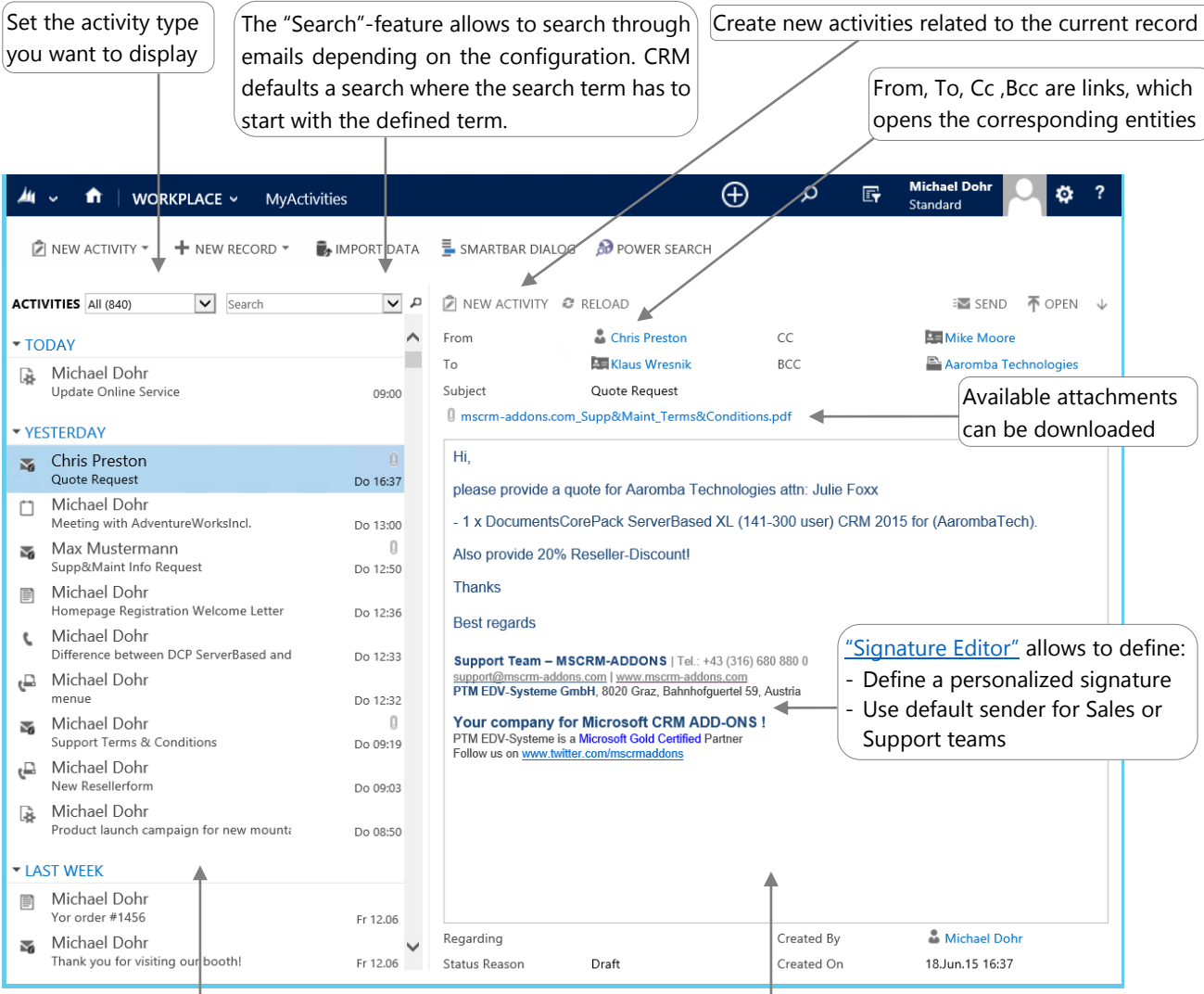
Hello!

Thank you for using [ActivityTools](#). This guide will help you to work with this Add-On right away, introducing the main features. For detailed information, please take a look at the [guides](#) or [blog](#).

Installation: For details on how to install ActivityTools, please read the [installation guide](#). If ActivityTools is already installed, please continue reading.

How to use ActivityTools: Depending on the configuration ActivityTools Preview can be accessed directly on the entity form.

Activity-Preview: Shows all activities (email, phone, appointment ...) related to a CRM record or to a user.



The screenshot shows the ActivityTools interface with several callouts:

- Set the activity type you want to display:** Points to the 'ACTIVITIES' dropdown menu.
- The "Search"-feature allows to search through emails depending on the configuration. CRM defaults a search where the search term has to start with the defined term.** Points to the search input field.
- Create new activities related to the current record:** Points to the 'NEW ACTIVITY' button.
- From, To, Cc ,Bcc are links, which opens the corresponding entities** Points to the recipient information in the email preview.
- Available attachments can be downloaded** Points to the PDF attachment link in the email preview.
- "Signature Editor" allows to define:**
 - Define a personalized signature
 - Use default sender for Sales or Support teams
- List of activities: Here you can see the activities for the selected entity. Any record can be opened with a double-click.** Points to the activity list on the left.
- Preview of the currently selected activity** Points to the email content preview on the right.

License Manager

All our Add-Ons come with a 14-days trial license. Once received the license file from our support-team, open the License Manager to install it.

Contact

We hope our product is to your full satisfaction and a useful supplement to your business activities. If you have questions to the product, please send an email to support@mscrm-addons.com
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