ActivityTools for Microsoft CRM 4.0

User's Guide
(How to use ActivityTools for Microsoft CRM 4.0)

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Welcome to the help for **ActivityTools for Microsoft CRM 4.0**. This document will show you the functionality and features of the ActivityTools.

If you need to reach us, see the contact page

2 User’s Guide

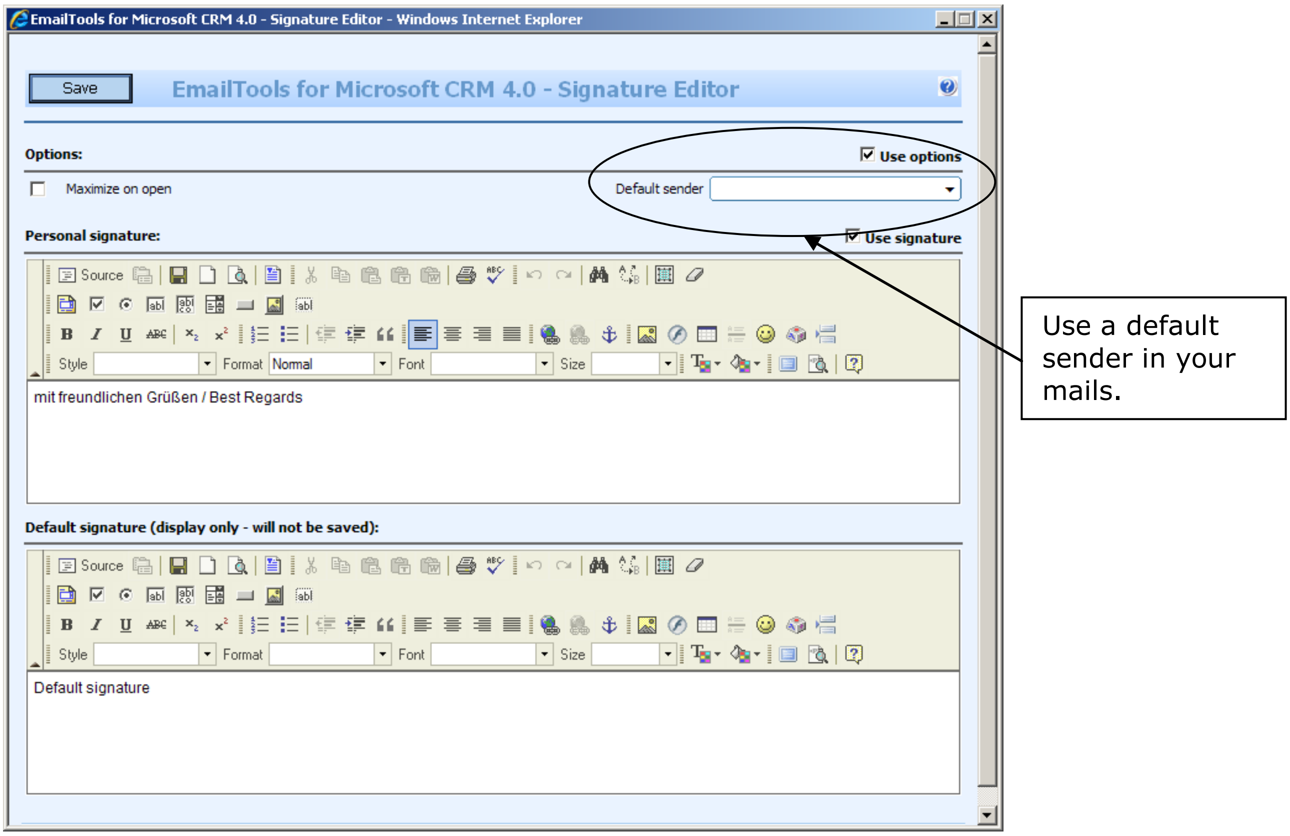
Introduction

ActivityTools is an enhancement for Microsoft CRM 4 that is designed to provide an email signature feature. Some email options and display options for Microsoft CRM 4.0 mailing-procedures.

The product enables you to have Microsoft CRM 4.0 mails automatically supplied with either a personal signature or a default signature and have a sender ID prefilled into the mail form.
Additionally it’s capable of showing up an activity-preview, displaying information of activities, saved to an CRM-record (e.g. Account, Contact) within one window.

The signature window

<Settings><Users><”Username”> press Button [EmailSignature]

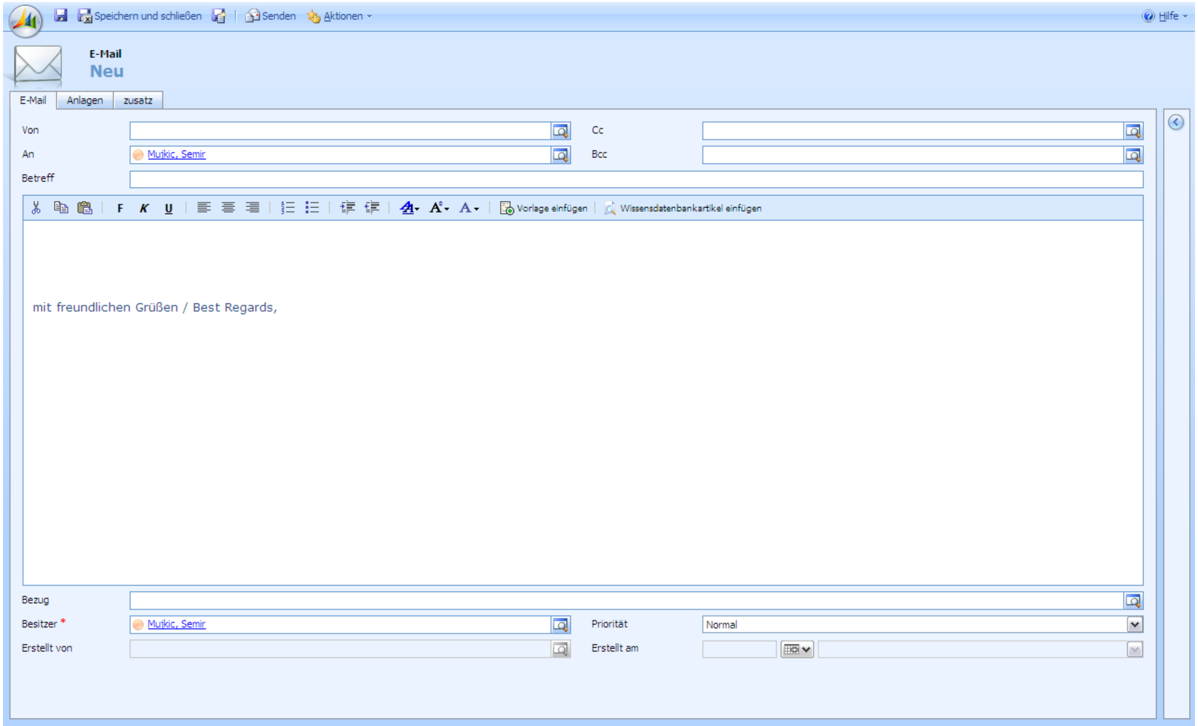


This editor allows you to format the text the way you want.

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 full screen, when opened.

The email window

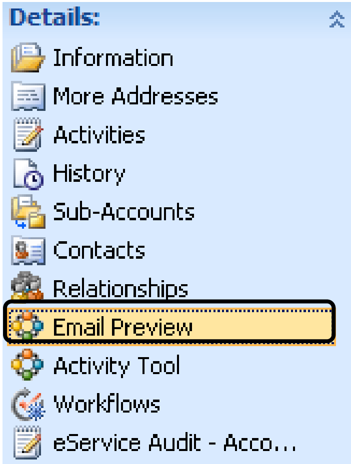


Having provided the required information, the Microsoft CRM 4.0 Email window opens full screen, and is supplied with the default sender and the signature desired.

If no personalized settings and signatures are provided, ActivityTools for Microsoft CRM 4.0 uses a default signature and setting.

Email Preview

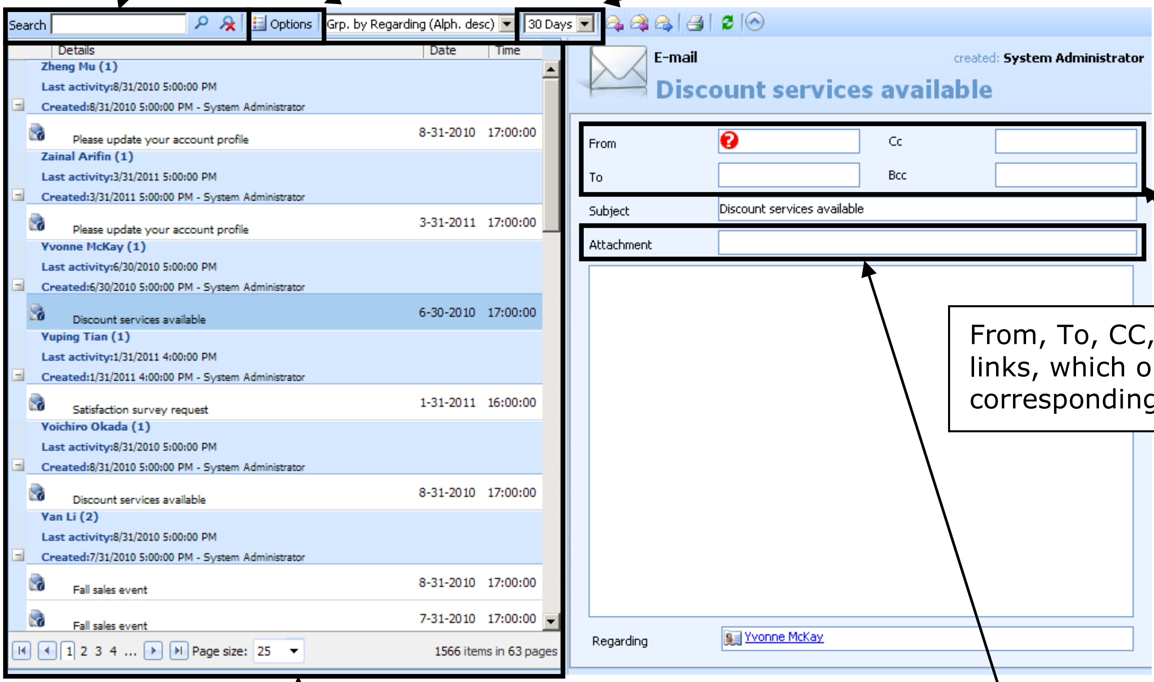
Depending on the setup, "Email Preview" is now available for several entities.
The Preview can easily be accessed through the new menu-entry "Email Preview"



The Search-feature enables users to search through mails depending on the configuration (see below)

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.

By marking this checkbox the emails will be filtered by date.



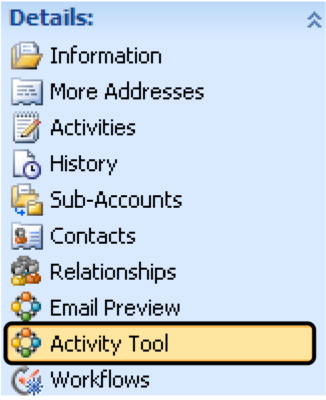
From, To, CC, Bcc are links, which opens the corresponding entities.

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

You can download the attachments if available here.

Activity Tool

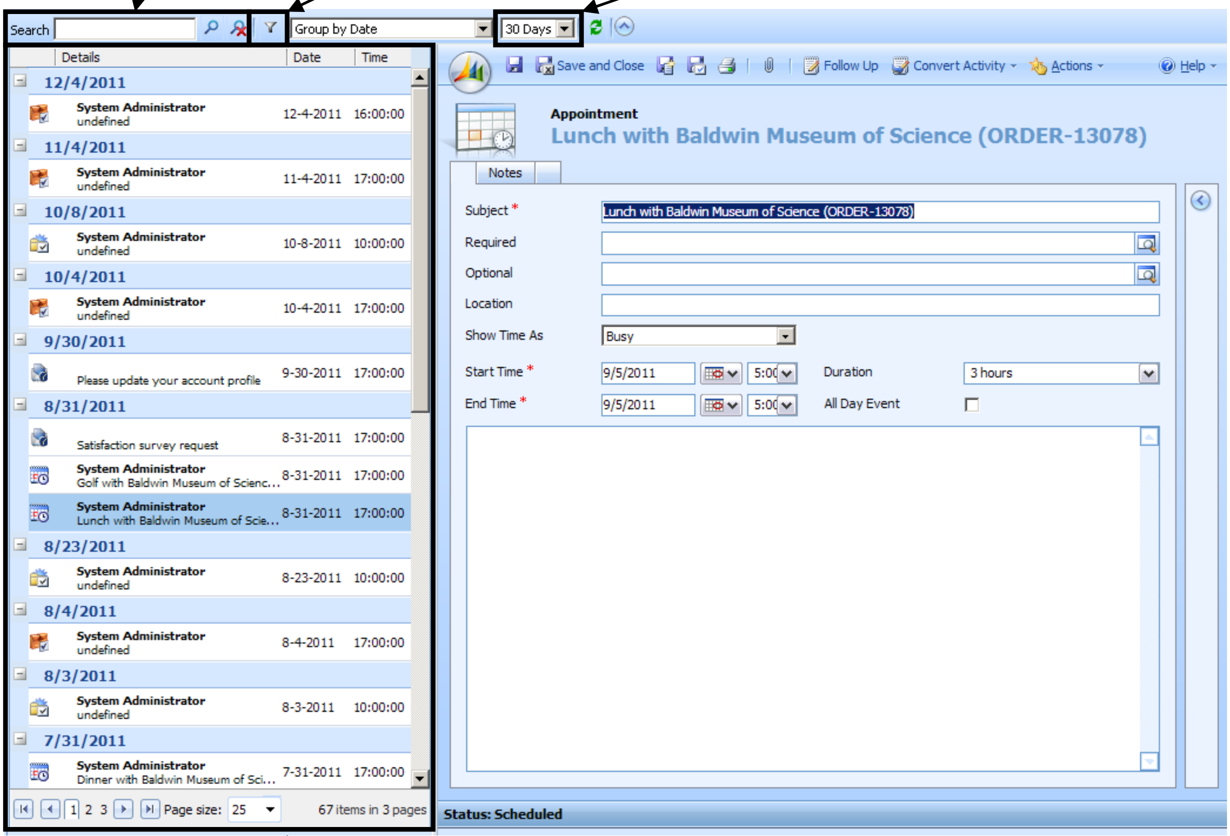
Depending on the setup, "Activity Tool" is now available for several entities.
The Preview can easily be accessed through the new menu-entry "Activity Tool"



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

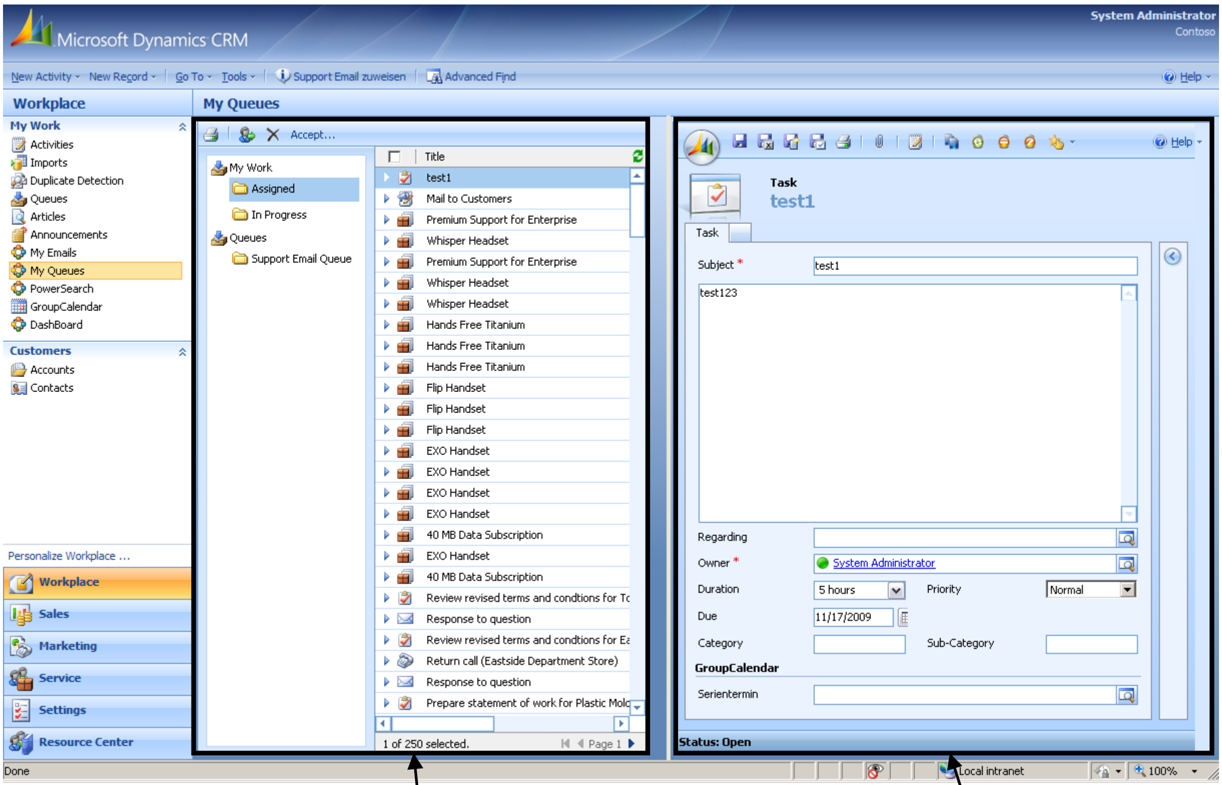
By clicking the options button you can select the types of activities you want to include in the preview and the attributes that should be used by the search feature.

Here you can filter the activities by reference date



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

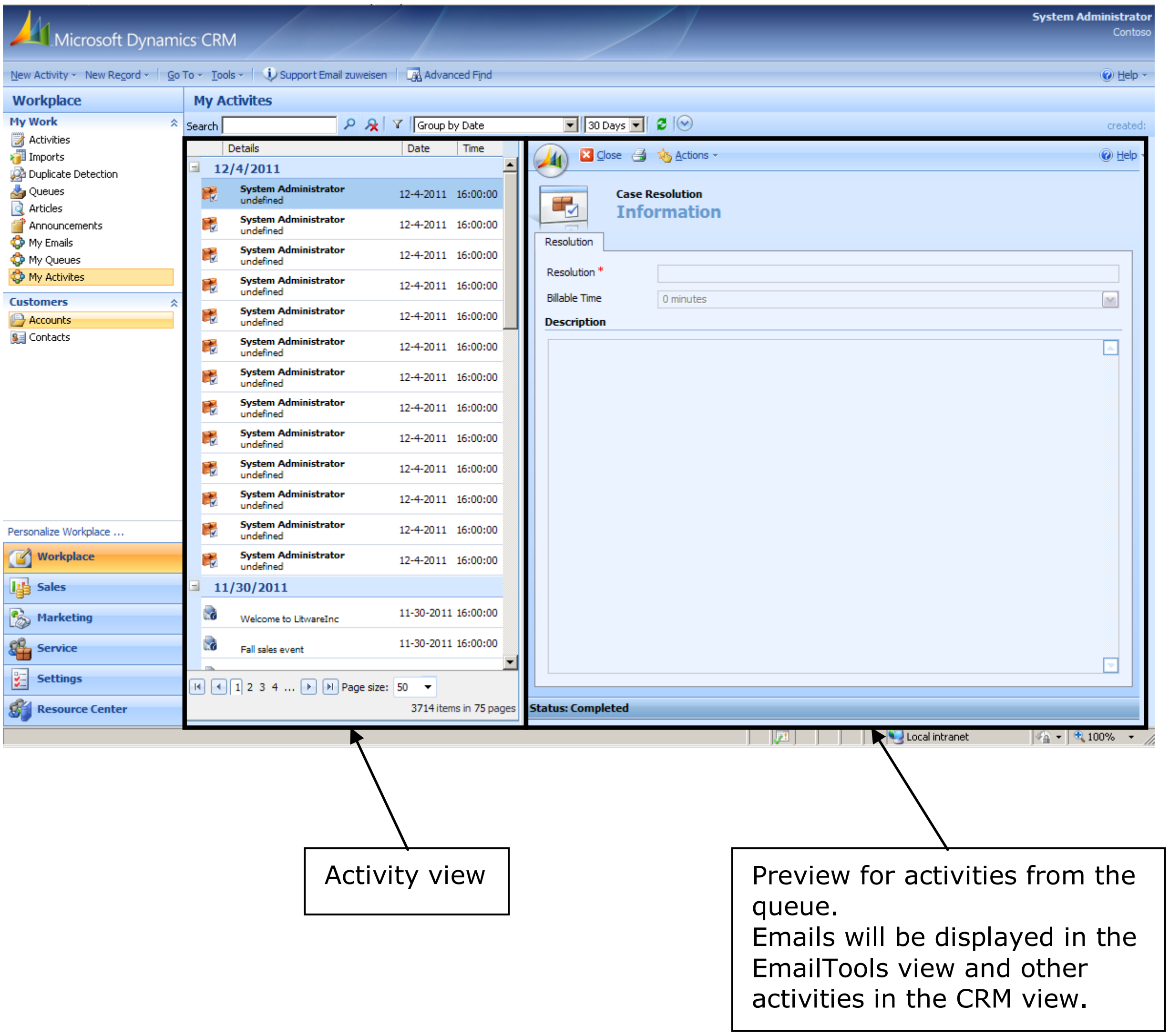
My Queues



Queue-View

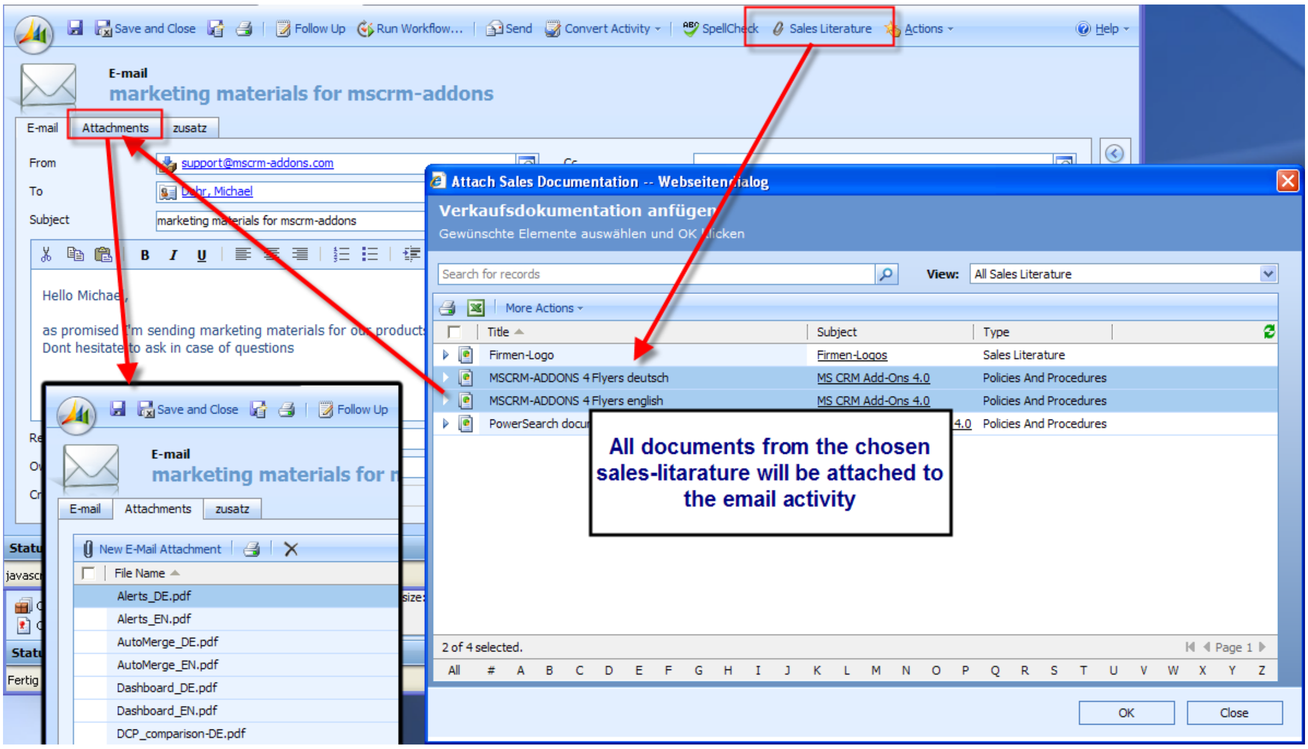
Preview for emails or activities from the queue.
Emails will be displayed in the EmailTools view and other activities in the CRM view.

My Activities



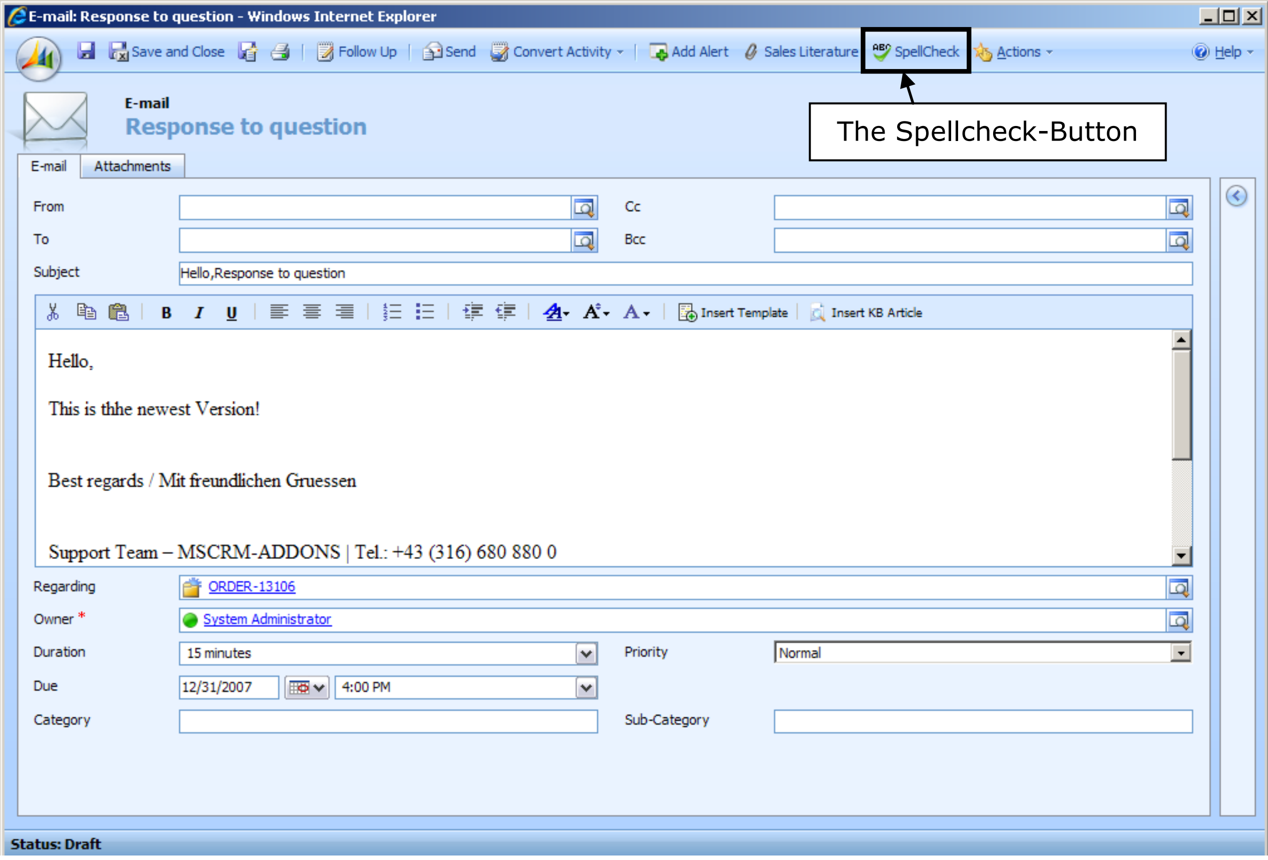
Sales Literature

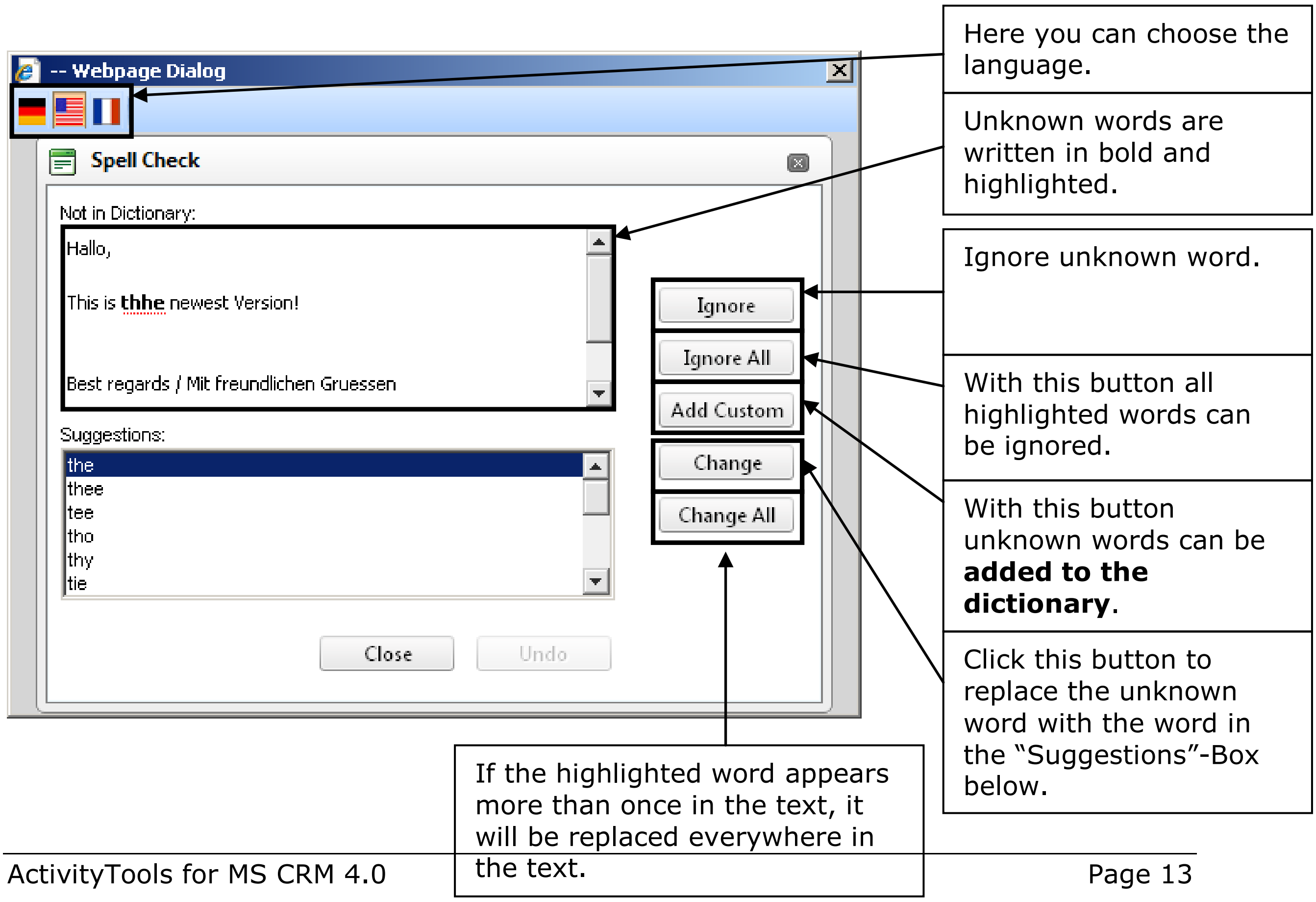
Sales literature can be attached to emails via a new button in the menubar quickly.



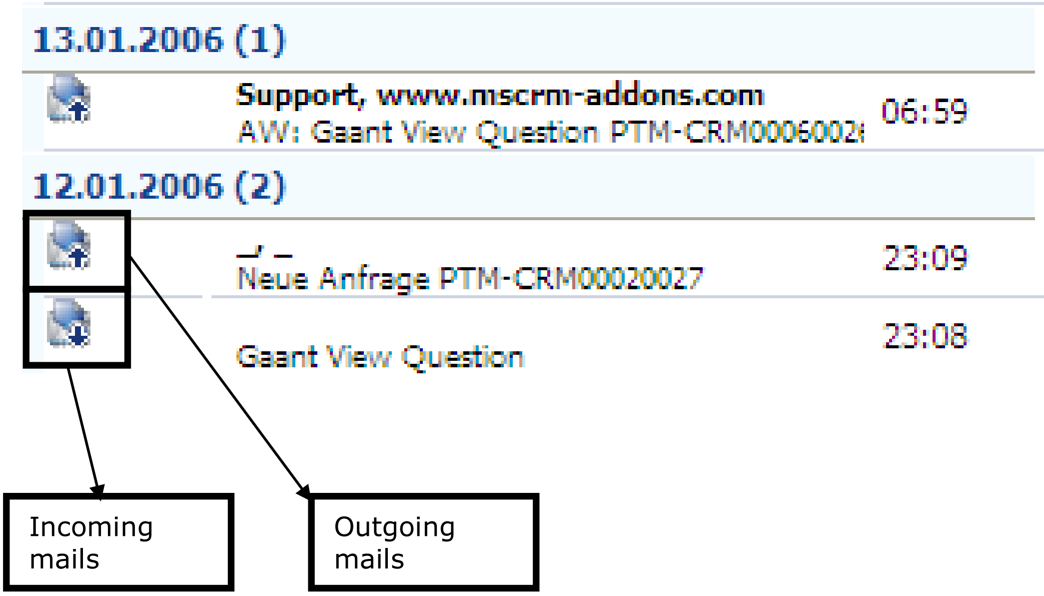
Spellchecking

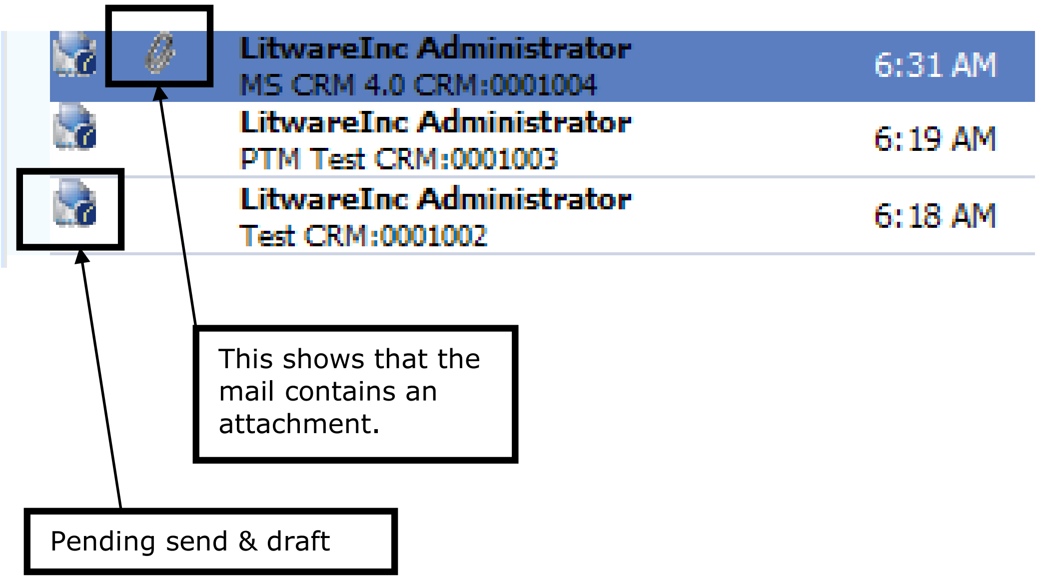
Spellchecking provides the possibility to find and correct mistakes in the content of emails.
Supported languages: French, English, German





EmailPreview icons:





Options MyEmails

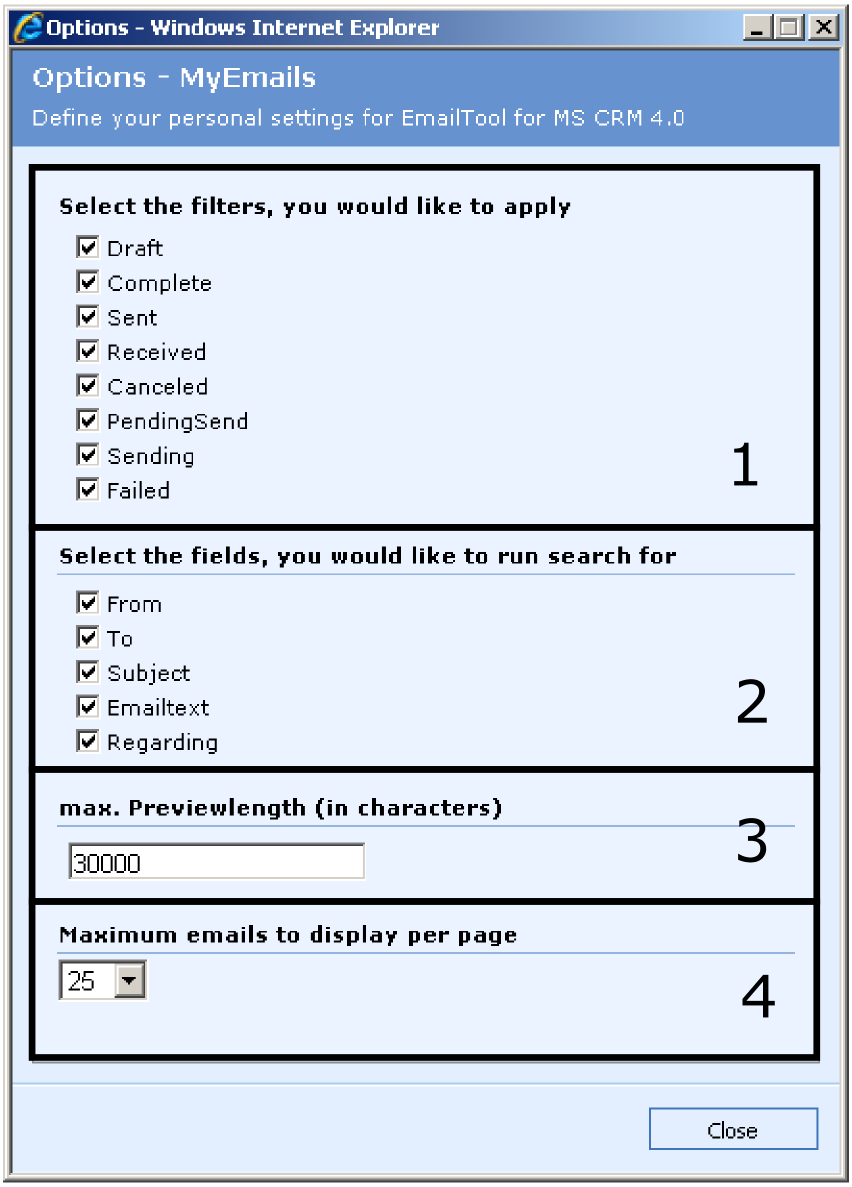
Basically there are four settings:

1. **Filters:** Select the types of email you want to include in the preview.

2. **Search:** Select the attributes of the e-mail entity which should be used by the search routine.

3. **Previewlength:** Enter how many characters to be displayed in the preview.

4. **Mails per site:** Select how many emails should be displayed per page.



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

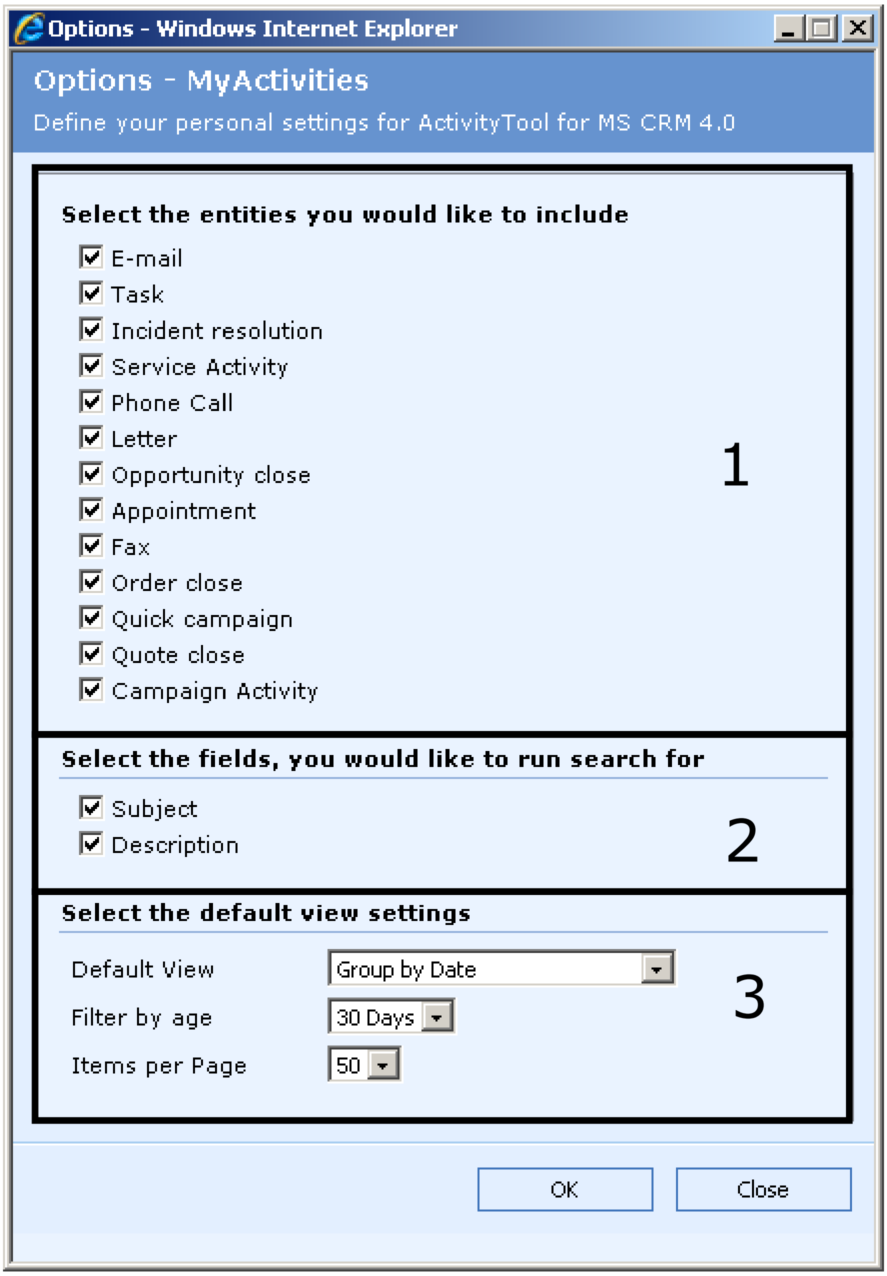
Options "My Activities"

Basically there are three settings:

1. **Filters:** Select the entities you would like to include

2. **Search:** Select the fields, you would like to run search for.

3. **Default view settings:** Select the default view settings



All changes will be saved to the settings entities for each user separately.
As for the Email preview, this enables users to personalize the preview.

3 Contact

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

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