



# ActivityTools for Microsoft CRM 4.0

## **User's Guide**

(How to use ActivityTools for Microsoft CRM 4.0)

# Table of Contents

<b>1</b>	<b>WELCOME</b>	<b>3</b>
<b>2</b>	<b>USER'S GUIDE</b>	<b>4</b>
	<b>Introduction</b>	<b>4</b>
	<b>The signature window</b>	<b>4</b>
	<b>The email window</b>	<b>5</b>
	<b>Email Preview</b>	<b>6</b>
	<b>Activity Tool</b>	<b>8</b>
	<b>My Queues</b>	<b>10</b>
	<b>My Activities</b>	<b>11</b>
	<b>Sales Literature</b>	<b>12</b>
	<b>Spellchecking</b>	<b>13</b>
	<b>Options MyEmails</b>	<b>15</b>
	<b>Options "My Activities"</b>	<b>16</b>
<b>3</b>	<b>CONTACT</b>	<b>17</b>

# 1 Welcome

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

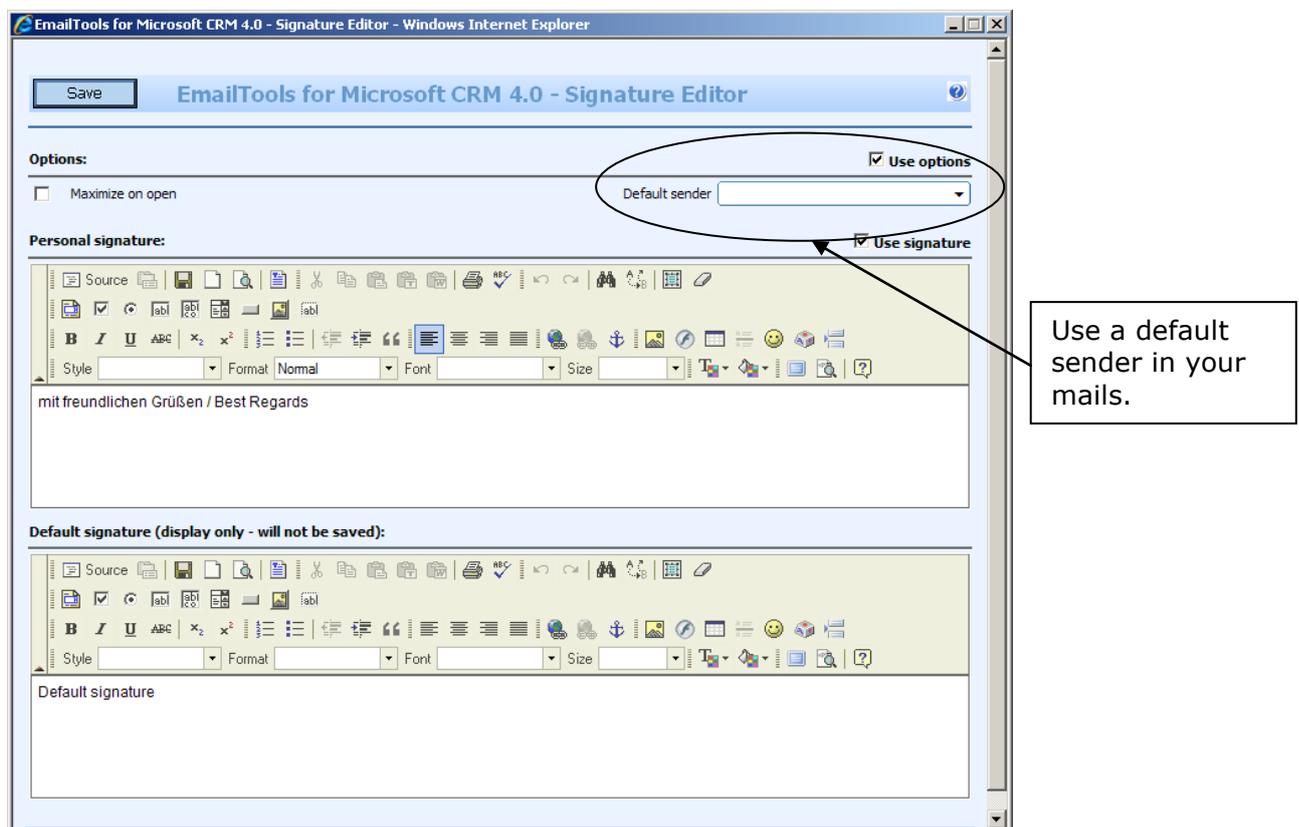
ActivityTools is an enhancement for Microsoft CRM 4 that is designed to provide an email signature feature. Some email options and display options for Microsoft CRM 4.0 mailing-procedures.

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]

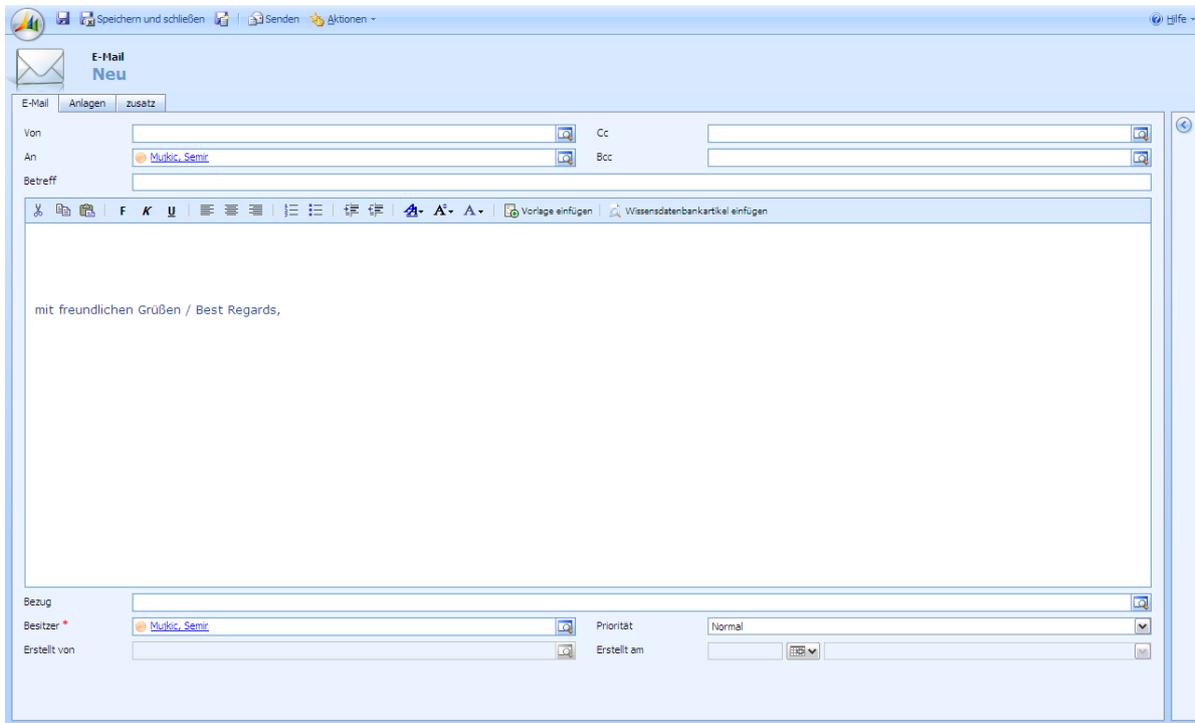


**This editor allows you to format the text the way you want.**

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

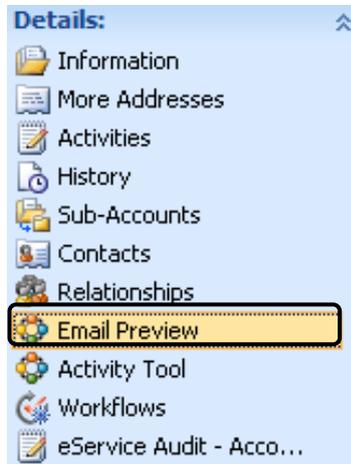


Having provided the required information, the Microsoft CRM 4.0 Email window opens full screen, and is supplied with the default sender and the signature desired.

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.

You can download the attachments if available here.

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

The screenshot shows a search results list on the left and a detailed view of an email on the right. The search results list includes columns for 'Details', 'Date', and 'Time'. The detailed view shows the email header with fields for 'From', 'To', 'Cc', 'Bcc', 'Subject', and 'Attachment'. The 'Subject' field contains the text 'Discount services available'. The 'Attachment' field is empty. The 'Regarding' field at the bottom of the detailed view shows a link to 'Yvonne McKay'.

## 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.

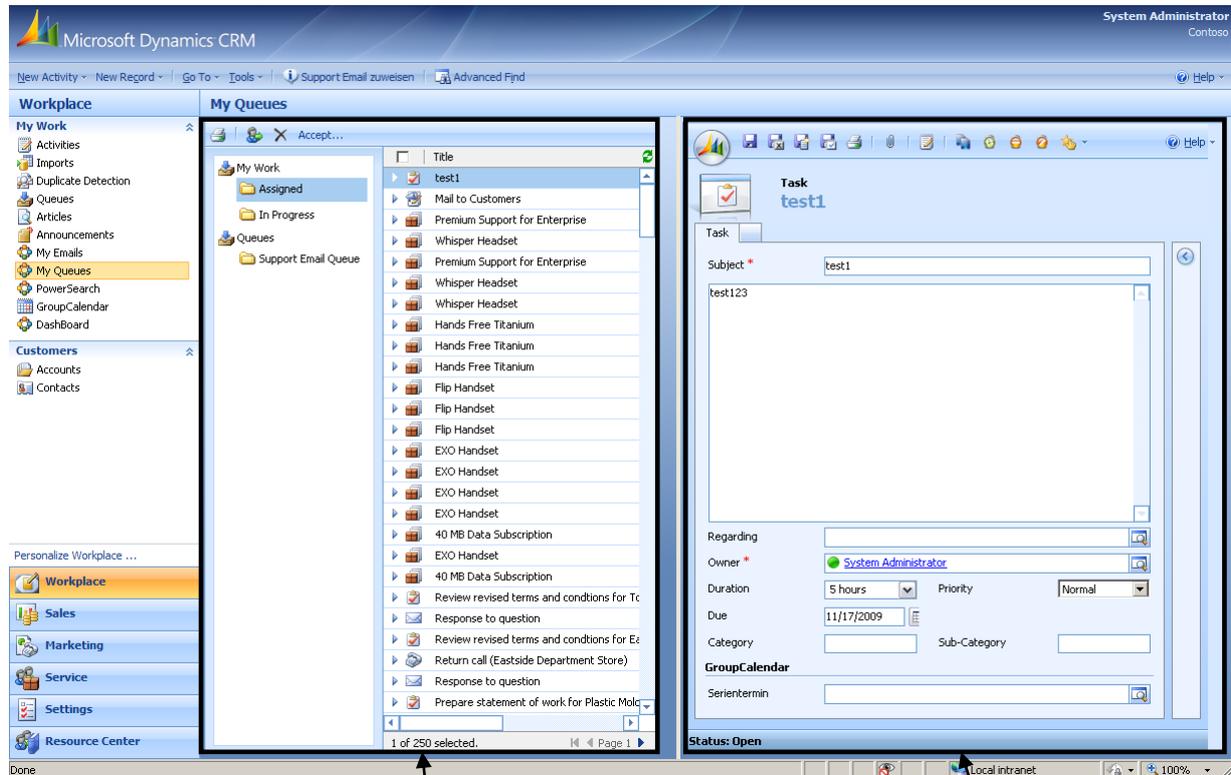
Here you can filter the activities by reference date

The screenshot displays the ActivityTools for MS CRM 4.0 interface. On the left, a list of activities is shown, grouped by date. The right pane shows a detailed view of a selected appointment titled "Lunch with Baldwin Museum of Science (ORDER-13078)". The appointment details include fields for Subject, Required, Optional, Location, Show Time As, Start Time, End Time, Duration, and All Day Event. The status is "Scheduled".

Details	Date	Time
12/4/2011		
System Administrator undefined	12-4-2011	16:00:00
11/4/2011		
System Administrator undefined	11-4-2011	17:00:00
10/8/2011		
System Administrator undefined	10-8-2011	10:00:00
10/4/2011		
System Administrator undefined	10-4-2011	17:00:00
9/30/2011		
Please update your account profile	9-30-2011	17:00:00
8/31/2011		
Satisfaction survey request	8-31-2011	17:00:00
System Administrator Golf with Baldwin Museum of Scienc...	8-31-2011	17:00:00
System Administrator Lunch with Baldwin Museum of Scie...	8-31-2011	17:00:00
8/23/2011		
System Administrator undefined	8-23-2011	10:00:00
8/4/2011		
System Administrator undefined	8-4-2011	17:00:00
8/3/2011		
System Administrator undefined	8-3-2011	10:00:00
7/31/2011		
System Administrator Dinner with Baldwin Museum of Sci...	7-31-2011	17:00:00

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

# My Queues



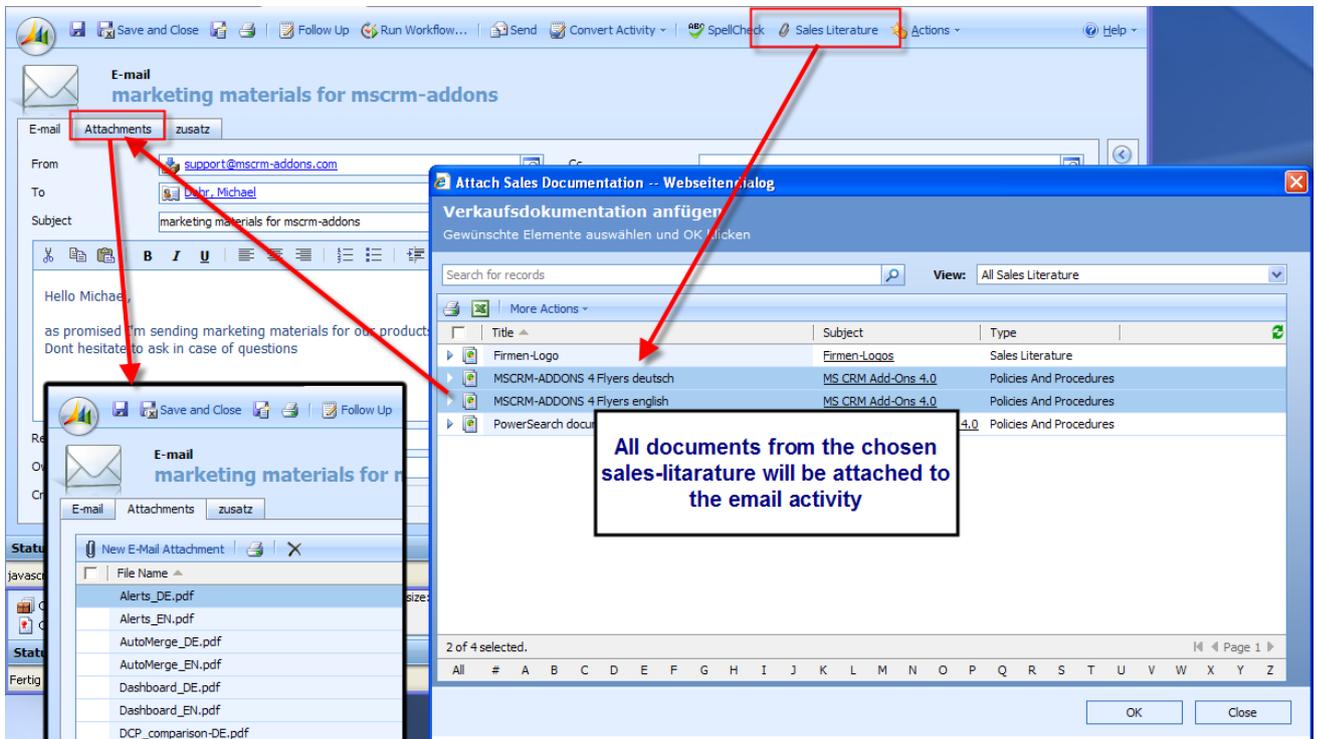
Queue-View

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



## Sales Literature

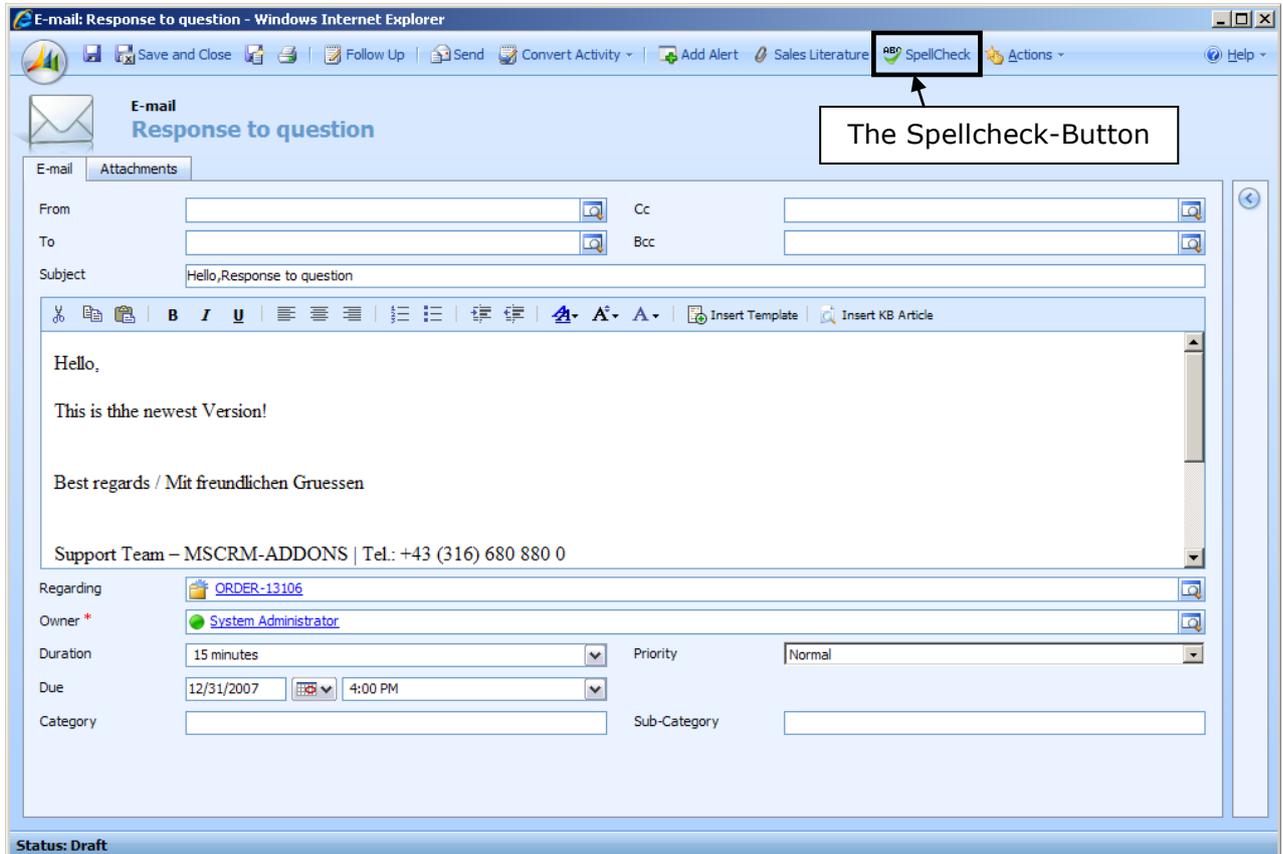
Sales literature can be attached to emails via a new button in the menubar quickly.



## Spellchecking

Spellchecking provides the possibility to find and correct mistakes in the content of emails.

Supported languages: French, English, German



The "Spell Check" dialog box is shown with the following text: "Not in Dictionary: Hallo, This is thhe newest Version! Best regards / Mit freundlichen Gruessen". The "Suggestions" list includes: the, thee, tee, tho, thy, tie. The dialog has buttons for "Ignore", "Ignore All", "Add Custom", "Change", and "Change All".

- Here you can choose the language.
- Unknown words are written in bold and highlighted.
- Ignore unknown word.
- With this button all highlighted words can be ignored.
- With this button unknown words can be **added to the dictionary**.
- Click this button to replace the unknown word with the word in the "Suggestions"-Box below.
- If the highlighted word appears more than once in the text, it will be replaced everywhere in the text.

**EmailPreview icons:**

**13.01.2006 (1)**

	<b>Support, www.msCRM-addons.com</b> AW: Gaant View Question PTM-CRM0005002:	06:59
---	---	-------

**12.01.2006 (2)**

	– – Neue Anfrage PTM-CRM00020027	23:09
	Gaant View Question	23:08

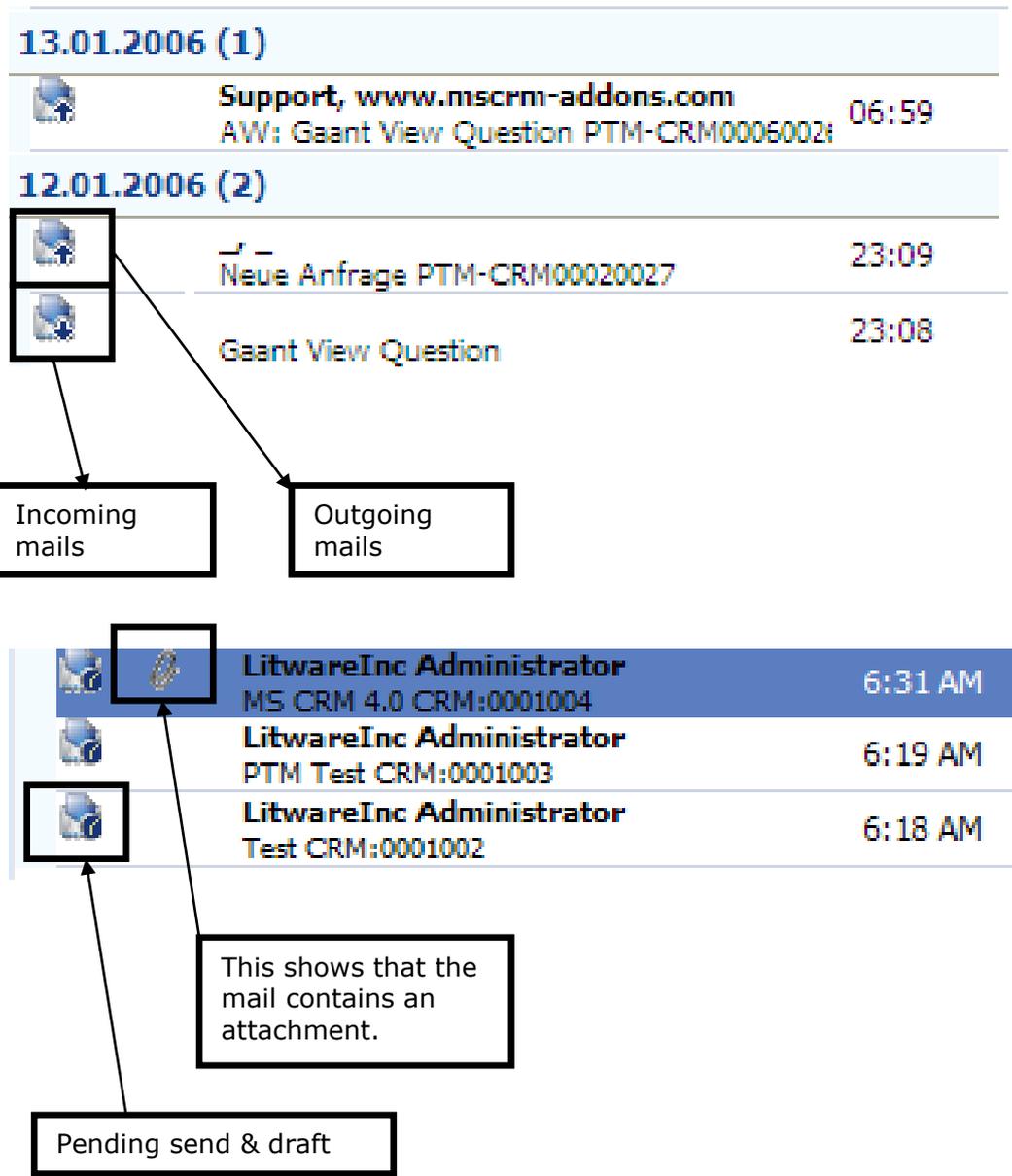
**Incoming mails**      **Outgoing mails**

		<b>LitwareInc Administrator</b> MS CRM 4.0 CRM:0001004	6:31 AM
		<b>LitwareInc Administrator</b> PTM Test CRM:0001003	6:19 AM
		<b>LitwareInc Administrator</b> Test CRM:0001002	6:18 AM

**Pending send & draft**

This shows that the mail contains an attachment.



## 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.

Options - Windows Internet Explorer

Options - MyEmails

Define your personal settings for EmailTool for MS CRM 4.0

**Select the filters, you would like to apply**

- Draft
- Complete
- Sent
- Received
- Canceled
- PendingSend
- Sending
- Failed

**Select the fields, you would like to run search for**

- From
- To
- Subject
- Emailtext
- Regarding

**max. Previewlength (in characters)**

**Maximum emails to display per page**

Close

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

The screenshot shows a Windows Internet Explorer window titled "Options - MyActivities". The main content area is divided into three sections, each with a large number indicating its position in the list:

- Section 1: Select the entities you would like to include**
  - E-mail
  - Task
  - Incident resolution
  - Service Activity
  - Phone Call
  - Letter
  - Opportunity close
  - Appointment
  - Fax
  - Order close
  - Quick campaign
  - Quote close
  - Campaign Activity
- Section 2: Select the fields, you would like to run search for**
  - Subject
  - Description
- Section 3: Select the default view settings**
  - Default View: Group by Date
  - Filter by age: 30 Days
  - Items per Page: 50

At the bottom of the dialog are "OK" and "Close" buttons.

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](mailto:support@mscrm-addons.com)

PTM EDV-Systeme GmbH,  
Bahnhofsgürtel 59  
8020 Graz, Austria

Tel +43 316 680-880-0  
Fax +43 316 680-880-25  
[www.ptm-edv.at](http://www.ptm-edv.at)  
[www.mscrm-addons.com](http://www.mscrm-addons.com)