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ActivityTools for Microsoft Dynamics CRM



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ActivityTools

As the gatekeeper for customer interaction Activities are key in every CRM system.

Goal: Simplify activity handling inside Dynamics CRM

Why would I use it?

Increase productivity by providing tools to handle activities more efficiently

• Visualization

- Outlook like view of activities
- Quick and Advanced Search
- All activity-types supported (including custom activities)

• Email Features

- Define personal email signatures
 - HTML or Plain Text
- Define default signatures/senders



The screenshot shows the Microsoft Dynamics CRM interface. At the top, there's a navigation bar with 'Microsoft Dynamics CRM', 'SALES', 'Accounts', and 'MSCRM-ADDONS.com'. Below this is a toolbar with various icons. The main area shows the 'Account Overview' for 'MSCRM-ADDONS.com'. On the left, there are several activity counts: 155 Activities, 4 Notes, 2 Accounts, 7 Contacts, 5 Quotes, and 6 Orders. The 'ActivityPreview' window is open, showing a list of email activities. The selected email is from Michael Dohr to Clint Higley, with the subject 'Here is your quote: nbspnbsp:QUO-01001-8NTM05'. The email content includes a quote and a promotional message for MSCRM-ADDONS.

Activity-Preview

1. Overview (Left Pane, marked red)

- List of activities (standard & custom)
- Search capabilities

2. Preview (Right Pane, marked green)

- Direct access to attachments and related records (from,to,cc,bcc...)
- Customizable layout

The screenshot displays the 'ActivityPreview' window. The left pane (marked with a red '1') shows a list of activities grouped by time periods: 'LAST WEEK', 'TWO WEEKS AGO', and 'THREE WEEKS AGO'. Each activity entry includes the sender's name (Michael Dohr), a snippet of the message, and the time received. The right pane (marked with a green '2') shows a detailed preview of an email. The email header includes 'From: Michael Dohr', 'To: Clint Higley', and 'Subject: Here is your quote: nbsp;nbsp;QUO-01001-8NTM05'. The body of the email contains a greeting, contact information for the 'Support Team - MSCRM-ADDONS', and a promotional message for a conference. The bottom of the preview pane shows related records, including 'Some Bikes & Computers' and 'Draft'.

Email Features

- **Signature Editor (Accessible on CRM User Form)**
 - Create personalized signatures for Users or Teams. (Plain Text and HTML supported)
 - Define default senders (Support or Sales teams)

ActivityTools Signature Editor for User **Michael Dohr**

Settings

General Options

Use Options
Maximize On Open
Sender Michael Dohr

Signature

Signature Options

Use Signature ▼ Insert Default Signature

```
<div><span style="font-family: arial; color: #1f497d; font-size: 10pt;">Hello.</span></div>
<div><span style="color: #1f497d; font-size: 10pt;"><br />
<span style="font-family: arial;">Best regards / Mit freundlichen Gruessen<br />
</span></div>
<table style="width: 462px; font-family: arial; height: 167px; border="0" cellspacing="0" cellpadding="0" width="462">
<tbody>
<tr>
<td style="height: 165px">
<div><span style="color: #1f497d; font-size: 9pt;"><strong><span style="font-family: arial;">Support Team &nbsp;&nbsp;&nbsp; MSCRM-ADDONS</span></strong><span style="font-family: arial;"><span style="color: #7f7f7f; font-size: 8pt;">]</span><span style="color: #a6a6a6; font-size: 8pt;"></span></span><span style="font-family: arial; color: #7f7f7f; font-size: 8pt;">Tel: +43 (316) 680 880 0<br />
<span><a href="mailto:support@mscrm-addons.com"><span style="font-family: arial; color: #7f7f7f; font-size: 8pt;">support@mscrm-addons.com</span></a><span style="font-family: arial; color: #7f7f7f; font-size: 8pt;">&nbsp;&nbsp;&nbsp;<b>]</b></span><a href="http://www.mscrm-addons.com/"><span style="font-family: arial; color: #7f7f7f; font-size: 8pt;">www.mscrm-addons.com</span></a><b><br />
<span style="font-family: arial; color: #1f497d; font-size: 8pt;">PTM EDV-Systeme GmbH</span></b><span style="font-family: arial;"><span style="color: #404040; font-size: 8pt;">, 8020 Graz, Bahnhofguertel 59, Austria</span></span><br />
<b><span style="color: #1f497d; font-size: 10pt;">Your company&nbsp;&nbsp;&nbsp;for&nbsp;&nbsp;&nbsp;Microsoft CRM&nbsp;&nbsp;&nbsp;ADD-ONS ]</span></b></div>
<div><span style="font-family: arial;"><span style="color: #404040; font-size: 8pt;">PTM EDV-Systeme is a </span><span style="color: #0000ff; font-size: 8pt;">Microsoft Gold Certified</span><span style="color: #404040; font-size: 8pt;">
Partner</span></div>
<div><span style="font-family: arial; color: #404040; font-size: 8pt;">Follow us on <a href="http://www.twitter.com/mscrmaddons">www.twitter.com/mscrmaddons</a></span></div>
<div style="margin-top: 10pt; color: red; font-size: 10pt;"><b>Meet us in person</b>> We are exhibiting at the <b>World Partner Conference.<br />
(10-14 July)</b> at the Los Angeles Convention Center, California and would welcome you to visit us at our <a href="http://www.mscrm-addons.com/Expo/tabid/149/Default.aspx">booth No: 347</a>. </div>
</span></div>
</td>
<td style="height: 165px">&nbsp;&nbsp;&nbsp;</td>
</tr>
</tbody>
</table>
```

Save | Cancel

How to Deploy to CRM

ActivityTools can simply be deployed to CRM Forms, the SocialPane or added to the NavBar by referencing the „ptm_ActivityTools/Mainpage.html“ webresource

- Embed into Entity Forms or Social Pane

LEAD ▾
DARREN Gehring

Lead Source: Other | Rating: Hot | Status: New | Owner: Michael [D]

Qualify (Active) | Develop | Propose | Close | Next Sta

Summary

CONTACT

Topic* Mailed an interest card back for road bikes
Name* DARREN Gehring
Job Title Owner
Business Phone 123654877
Mobile Phone 555-6897
Email someone@example.com
[Open Calendar](#)

COMPANY

Company* Journey Sporting Goods
Website --
Address 5431 180th Ave SW
Bellevue, WA 20935
U.S.

ACTIVITIES NOTES

All (23) Search NEW ACTIVITY RELOAD OPEN ↓

Call From Michael D Phone Number 123654877
To DARREN G Direction Outgoing
Subject Convergence FU -key leads
vers interested
Regarding DARREN G Created By Michael Dc
Open

LAST MONTH

- Michael Dohr 04.05.2015
- Michael Dohr 04.05.2015
- Michael Dohr 04.05.2015

OLDER

- Michael Dohr Convergence FU -key leads 19.03.2015
- Michael Dohr 19.03.2015
- Michael Dohr follow up 19.03.2015
- Michael Dohr 19.03.2015
- Michael Dohr 19.03.2015

- Embed into CRM NavBar

Thank You

Feel free to join our upcoming Webinars!

<http://www.mscrm-addons.com/Support/Webinars.aspx>

Resources:

- You can find us on the web at <http://www.mscrm-addons.com>
- Help-Center (Live-Chat, Support): <http://www.mscrm-addons.com/Support.aspx>
- Don't forget we have an awesome blog at <http://blogs.mscrm-addons.com/>, you'll find it to be a helpful resource!

Contact:



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Europe: +43 (316) 680 880



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