



mscrm-addons.com

Your company for MS-CRM ADD-ONS!

5 CRM-hacks that optimize your productivity!

Dynamics 365!

mscrm-addons.com is ready! Are you?



Dynamics 365 for
Sales



Dynamics 365 for
Customer Service



Dynamics 365 for
Project Service Automation



Dynamics 365 for
Field Service



Dynamics 365 for
Operations



Dynamics 365 for
Financials



Dynamics 365 for
Marketing



ActivityTools

Advanced activity-Handling in Dynamics 365: Outlook-like visualization

Control: Activity-Preview to be placed on entity forms.

Visualization

- Outlook like- view of activities
 - List View
 - Preview
- Search and Filter options
 - Quick and Advanced Search
- Flexible Layout
- Load on Demand (Performance)
- Shows related regarding records

Email-options

- Define personal email signatures
 - WYSIWYG-editor
- Define default signatures/senders
 - e.g. for support-team

The screenshot displays the MSCRM-ADDONS.com web interface. At the top, there is a navigation bar with the company logo and name, and a menu with options like 'Service', 'Accounts', and 'MSCRM-ADDONS.c...'. Below this is a toolbar with various actions such as 'SMARTBAR DIALOG', 'NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', 'DELETE', and 'SWITCH PROCESS'. The main content area is divided into several sections:

- ACCOUNT INFORMATION:** Displays account details for 'MSCRM-ADDONS.com', including website, phone, fax, and contact information for 'Christian Ternek'.
- ActivityPreview:** A list of activities with columns for 'ACTIVITIES', 'All (57)', 'Quick Search', and a date column. The selected activity is from Michael Dohr on 21.08.2015 with the subject 'Here is your quote: nbspnbsp;QUO-01001-8NTM05'.
- NEW ACTIVITY:** A section for creating a new activity, showing fields for 'From' (Michael Dohr), 'To' (Christian Ternek), and 'Subject' (Here is your quote: nbspnbsp;QUO-01001-8NTM05).
- Product Catalog:** A table showing product details for 'Graz8020'.

No.	Product Name	Price	Quantity	Amount
1006	Value-priced bike with many features of our top-of-the-line models. Has the same light, stiff frame, and the quick acceleration we're famous for. Frame: Aluminum 1 1 / 8 48H Tubing: Alloy / 7005 Triple Butted, hydroforming Color: gold Weight: 2.5 kg Seat tube: 31.6 mm	€ 1,500,00	1,00	€ 1,500,00

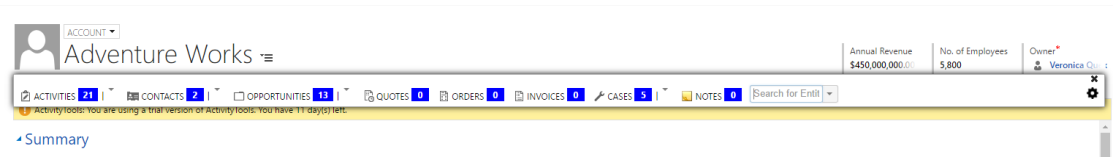
Regarding: Some Bikes & Compute Created By: Michael Dohr
Status Reason: Draft Created On: 21.Aug.15 13:25

SmartBar

Enhance CRM- User experience: Navigation, QuickAccess & „One-Click“-Actions

Simplify Navigation

- between related records
- Personalized menus

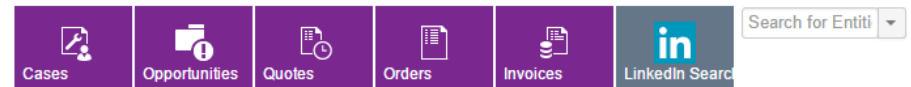


Count & Quick-Access of related records

- Access related records/activities,...
- See count of related entries (e.g. # of quotes, invoices...)

One-Click actions

- Fire workflows / javascript
- Open links
- Access CRM sitemap entries (e.g. security roles, processes, users, templates,...)
- ...



Demo

Productivity Hacks

Part 1) 360° view of activities of an account or contact

Part 2) Sales- history, Service history

Part 3) Simplified navigation with form-embedded buttons or from CommandBar

Part 4) Defining functional items in CRM Forms

Part 5) Personal menus (SmartBar embedded in Dashboards)

Thank You

Support & Contact

Resources:

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

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