

# PHONE CALLS CREATION USER GUIDE

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# CONTENTS

Description.....3

How to launch the Application.....3

How to use the Application.....4

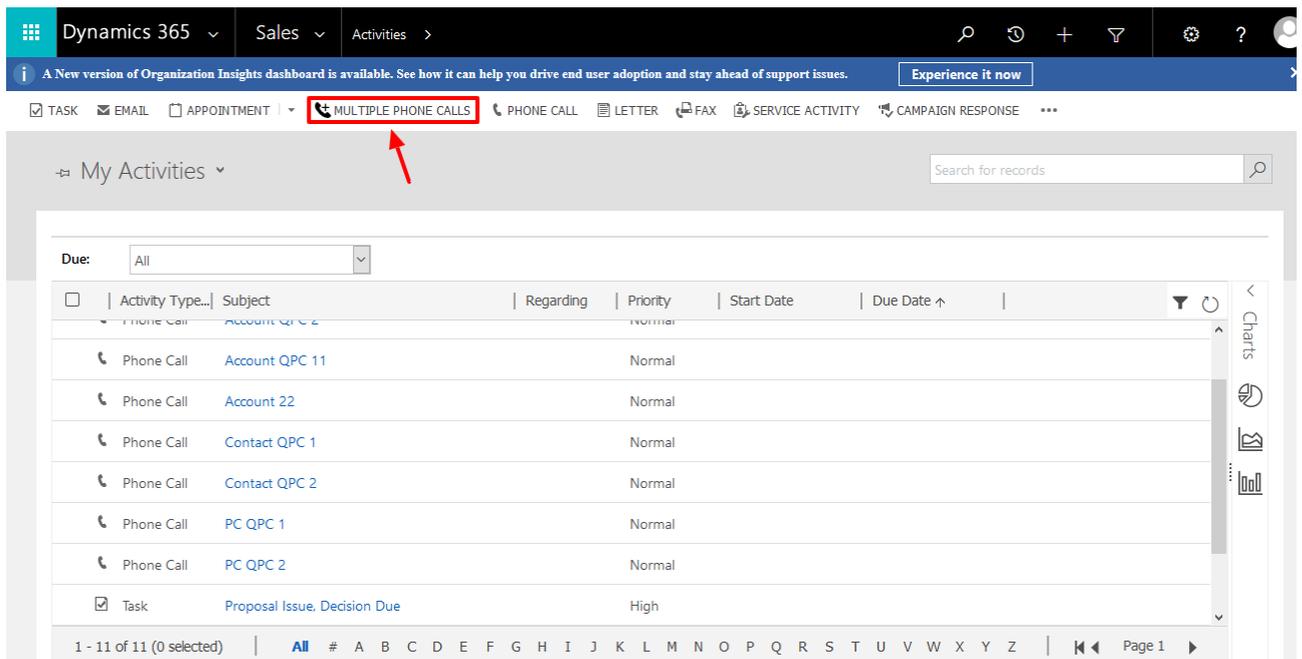
Restrictions.....5

## Description

The application allows to create multiple Phone call activities from a single page. You can create as much phone calls as you want and fill most important information from the application dialog box without opening any additional window. It will save you a lot of time and efforts if you have to add a lot of phone calls to the Dynamics 365 CRM system.

## How to launch the Application

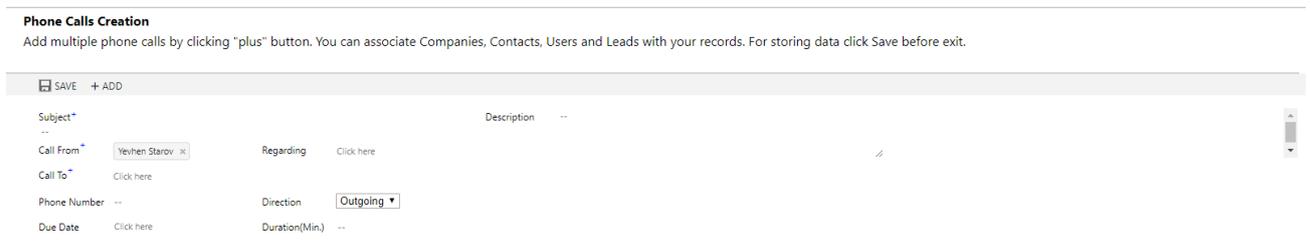
To open the application, go to Activities and Click on “Multiple phone calls” button.



The screenshot shows the Dynamics 365 CRM interface. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Activities'. Below the navigation bar, there is a blue banner with a message about the Organization Insights dashboard. The main area displays a list of activities under the heading 'My Activities'. The 'MULTIPLE PHONE CALLS' button is highlighted with a red box and a red arrow pointing to it. The list of activities includes several 'Phone Call' entries and one 'Task' entry.

Activity Type	Subject	Regarding	Priority	Start Date	Due Date
Phone Call	Account QPC 11		Normal		
Phone Call	Account 22		Normal		
Phone Call	Contact QPC 1		Normal		
Phone Call	Contact QPC 2		Normal		
Phone Call	PC QPC 1		Normal		
Phone Call	PC QPC 2		Normal		
Task	Proposal Issue. Decision Due		High		

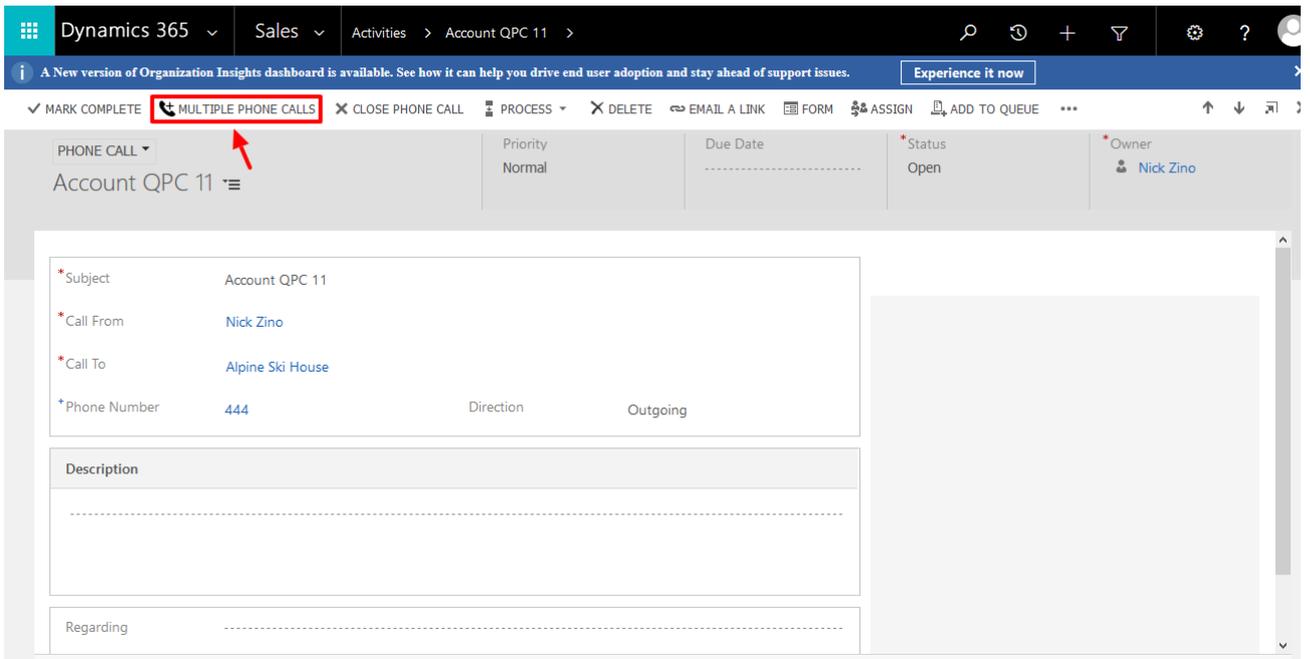
It will open the application in a new tab



The screenshot shows the 'Phone Calls Creation' dialog box. It includes a 'SAVE + ADD' button at the top left. The form fields are as follows:

- Subject: \*
- Call From: Yevhen Starov x
- Call To: Click here
- Phone Number: \*
- Direction: Outgoing
- Due Date: Click here
- Duration(Min): \*

You can find the button to launch the application on the Account form, Contact form or Activity form as well:



If you want to be able to launch the solution from somewhere else - you can create button yourself where you need it to be. To create a button we recommend to use “Ribbon Workbench”.

## How to use the Application

1. Create phone calls.

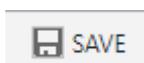
- 1) To add Phone calls click an “Add” button as many times as many phone calls you need to create If you need to remove one or more phone calls - click “Remove”.



2) Fill in fields for each phone call.

Subject <sup>+</sup>	--	Description	--
Call From <sup>+</sup>	Yevhen Starov ✕	Regarding	Click here
Call To <sup>+</sup>	Click here		
Phone Number	--	Direction	Outgoing ▼
Due Date	Click here	Duration(Min.)	--

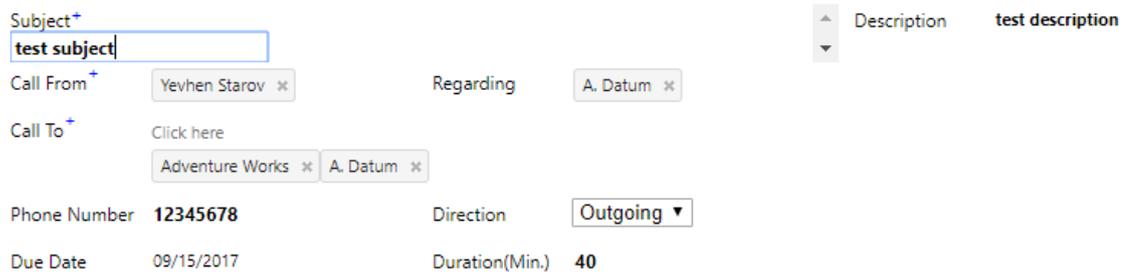
3) Click “Save” button.



**Success Metrics:** Phone calls will be created in CRM with data you’ve entered.

2. Update phone calls (after creation).

1) If you need to change data in specific fields – update data in the fields you need.



The screenshot shows a CRM form for updating a phone call record. The form is organized into several rows of fields:

- Subject:** A text input field containing "test subject".
- Call From:** A dropdown menu showing "Yevhen Starov" with a close button (x).
- Regarding:** A dropdown menu showing "A. Datum" with a close button (x).
- Call To:** A dropdown menu showing "Adventure Works" and "A. Datum" with close buttons (x). A "Click here" link is visible above the dropdown.
- Phone Number:** A text input field containing "12345678".
- Direction:** A dropdown menu showing "Outgoing" with a downward arrow.
- Due Date:** A text input field containing "09/15/2017".
- Duration(Min.):** A text input field containing "40".

On the right side of the form, there is a vertical scrollbar and a "Description" field containing "test description".

2) Click “Save” button.

**Success Metrics:** Phone calls in CRM will be updated with data you’ve changed.

## Restrictions

**Resolutions:** the application does not support devices with display width less than 590px.

It also won’t work if you resize browser window to width lower than 590px.

**Browsers:** the application was tested in Chrome and Edge browsers only. We cannot guaranty its stability in any other browser.