



EMAIL ALERT

A feature that provides the count of received unread emails on a case form

Contents

Overview.....	1
Verify the solution after the Installation.....	1
Email Alert Solution Configuration.....	3
Email Alert Fucntionality.....	6

Overview

The Email Alert Solution is an add-on feature to dynamics 365 CRM that manages unread CRM emails received on a Case, and the count.

Feature Benefits:

- The Case form dynamically updates the unread Pending Email Count without having to go to the Email section.
- Option to change the status of Emails from Read to Unread, and back again, thus dynamically affecting the Pending Count.

This solution is built on Dynamics 365 and seamlessly works on Dynamics CRM 2016 and above.

Verify the solution after the Installation

After downloading the solution from <https://appsource.microsoft.com/en-us> the following components should be present in Dynamics 365.

All Solutions

Name	Display Name	Version	Installed On	Package Typ...	Publisher	Description
MicrosoftLabsEmailAlert	MicrosoftLabs.EmailAlert	1.0.0.0	7/31/2017	Unmanaged	Dynamics 365	This solution contains all the components which are requi...

Following components should be available as a part of solution.

Solution: MicrosoftLabs.EmailAlert

Information

Solution MicrosoftLabs.EmailAlert

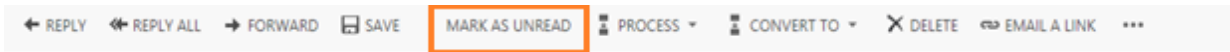
Component Type: All

Managed Properties

Display Name	Name	Type	State	Customizable	Descri
Case	incident	Entity	Managed	True	Service req
Email	email	Entity	Managed	True	Activity that
Email Count	msdyn_emailcounts	Entity	Unmanaged	True	
MicrosoftLabs.EmailAlert	MicrosoftLabs.EmailAlert	Plug-in Assembly	Unmanaged	True	
MicrosoftLabs.EmailAlert.EmailCount...	MicrosoftLabs.EmailAlert.E...	Sdk Message Processing S...	Unmanaged	True	MicrosoftLa
MicrosoftLabs.EmailAlert.EmailCount...	MicrosoftLabs.EmailAlert.E...	Sdk Message Processing S...	Unmanaged	True	MicrosoftLa
MicrosoftLabs.EmailAlert.PostCreate...	MicrosoftLabs.EmailAlert.P...	Sdk Message Processing S...	Unmanaged	True	MicrosoftLa
MicrosoftLabs.EmailAlert.PostUpdate...	MicrosoftLabs.EmailAlert.P...	Sdk Message Processing S...	Unmanaged	True	MicrosoftLa
msdyn_unreadEmailjs	msdyn_unreadEmailjs	Web Resource	Unmanaged	True	

1 - 9 of 9 (0 selected) Page 1

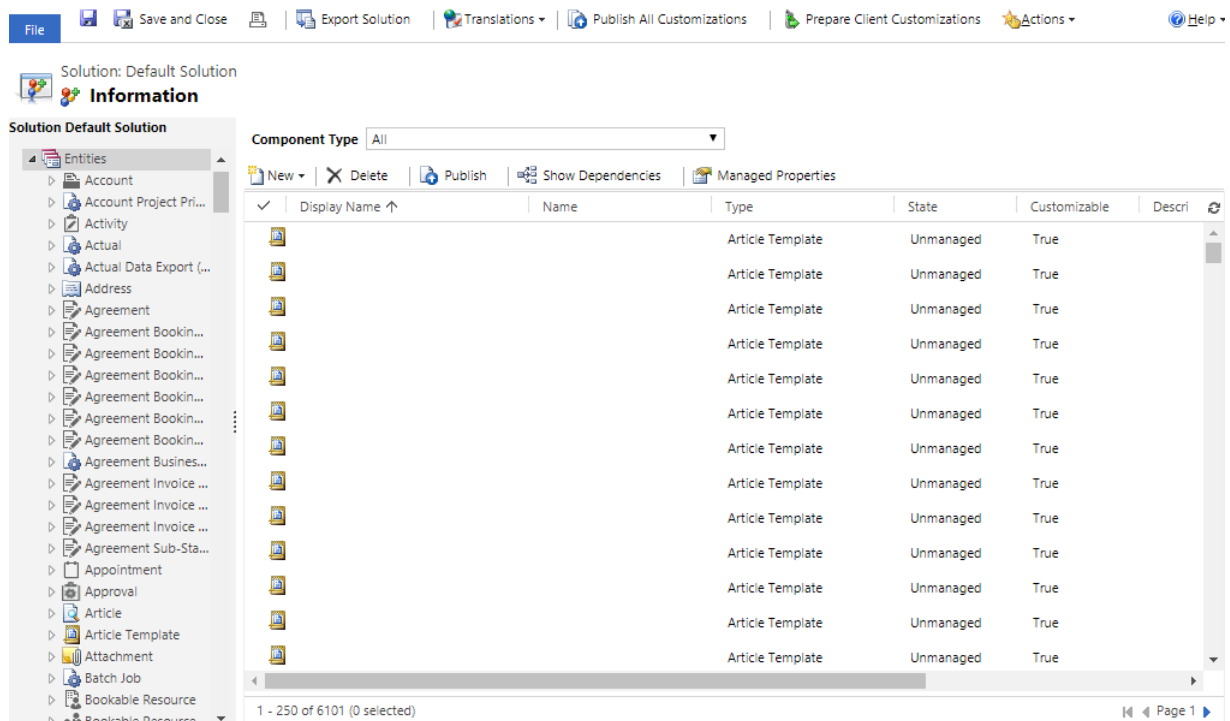
MARK AS READ and **MARK AS UNREAD** buttons should be visible on the received email blade.



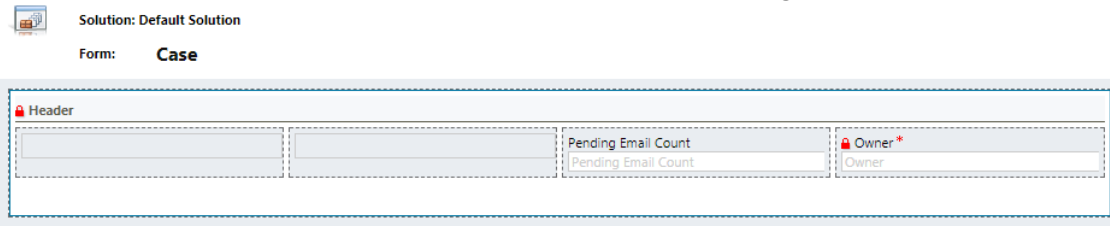
Email Alert Solution Configuration

1. Set the **Pending Email Count** field on the case form.

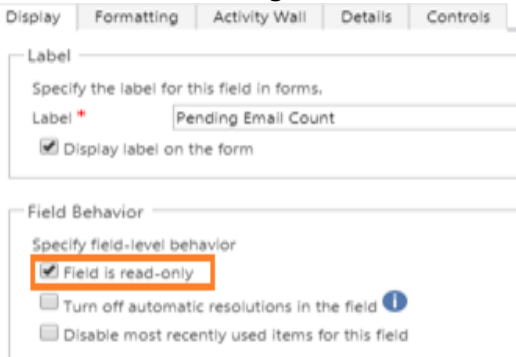
Go to **Settings|Customizations|Customize the system**



2. Select the **Case** entity from the **Entity List**, open Main form, and add the **Pending Email Count** field to the form. Save and publish the Main form after changes.



3. Set the Label as **Pending Email Count**, and check "**Field is read-only**". Save and publish the Main form after changes.



4. Go to the **Email** entity, open Email Main form and add **Unread** and **Email Read** fields to the form. Save and publish the Main form after changes.

▲ Email

Recipient Information

From	From
To	To
Cc	Cc
Bcc	Bcc
Subject	Subject
Unread *	Unread
Email Read	Email Read

5. Uncheck **“Display label on the form”** and **“Visible by default”** for the both **Unread** and **Email Read** fields. Save and publish the Main form after changes.

Field Properties ? ×

Modify this field's properties.

Display Formatting Details Events Business Rules Controls

Label

Specify the label for this field in forms.

Label * Unread

Display label on the form

Field Behavior

Specify field-level behavior

Field is read-only

Locking

Specify whether to lock this field on the form.

Lock the field on the form

Visibility

Specify the default visibility of this control.

Visible by default

Availability

Specify the default availability of this field on phone.

Available on phone

- Go to the **Email** entity, edit the Main form, go to the **Form Properties** and add **"msdyn_unread.js"** in form library section.

Form Properties ×
Modify this form's properties.

Events | Display | Parameters | Non-Event Dependencies

+ Add | Remove | Up | Down | Edit

Name	Display Name	Description
msdyn_unreadEmail.js		

Event Handlers

Manage functions that are called for form or field events.

Control: Form

Event: OnLoad

+ Add | Remove | Up | Down | Edit | Edit Library

Library	Function	Enabled
msdyn_unreadEmail.js	onReadOfEmail	True

- In **Event Handler**, ensure the Event is set for **OnLoad**. Add **"msdyn_unread.js"** as library and add **"onReadOfEmail"** as function name. Save and publish the Main form after changes.

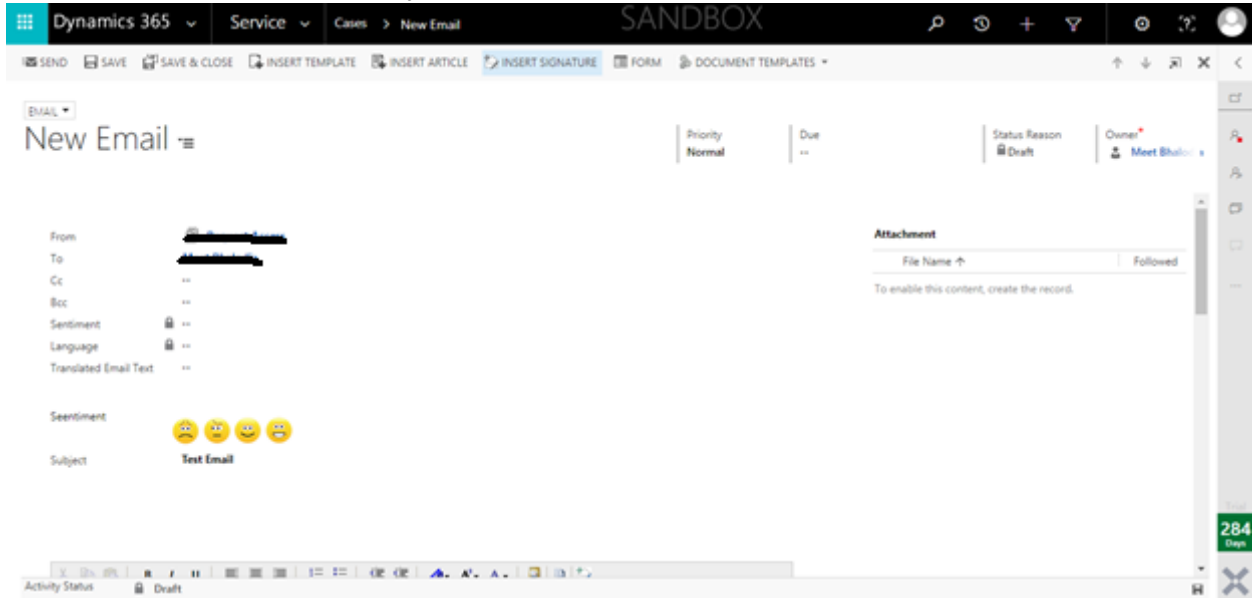
Handler Properties



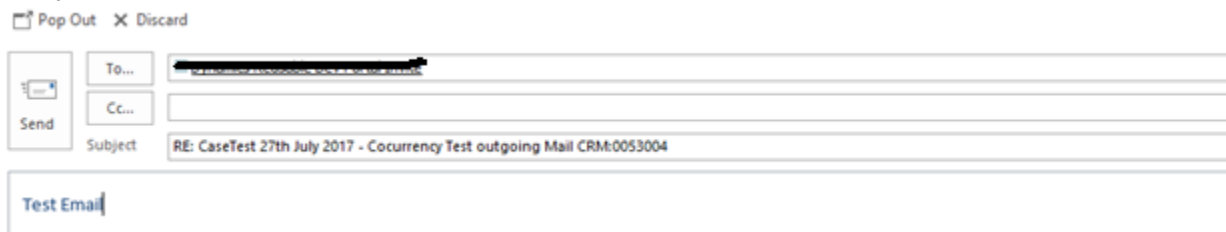
Email Alert Fucntionality

- Login to your Dynamics 365 Application.
- Go to **Service|Case** and create new case by providing values on case form.

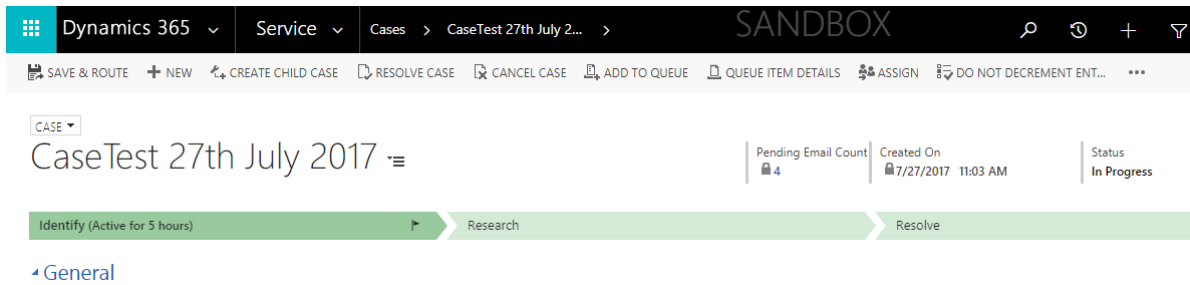
3. Send email from the case to any external user.



4. Reply to the mail from an external environment.



5. The **Pending Email Count** field *updates* when the user receives unread email relative to that case.



6. The **Pending Email Count** field *decreases* as incoming email is read.

Scenario: User receives email about a pending case, which they open to view. However they cannot act on it right away, so they wish to change the status as Unread.

- The User can change the status by clicking on the **MARK AS UNREAD** button located on the Email form. This action dynamically *increases* the **Pending Email Count** field on the Case.
- The User can change the status back using the **MARK AS READ** button, again dynamically *decreases* the **Pending Email Count** field on the Case.

End of Document