



ENHANCED EMAIL MANAGEMENT

A feature to provide outlook like functionalities for Email Activities

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Overview

In brief, this solution provides Outlook-like capabilities to the CRM Email Editor. This document describes how to make use of the Email Activity Grid features. Furthermore, the Email Editor can be customized by selecting the Email Description Form which enables an expanded and enhanced Menu Ribbon and provides support for Attachments which can be added via Drag & Drop.

Import the solution of Email Activities

All Solutions ▾

New Delete Import Export Clone a Patch Clone Solution Apply Solution Upgrade Import Translations Export Tran

Name	Display Name	Version	Installed On ↓	Package Type	Publisher
MicrosoftLabsEmailActivities	MicrosoftLabs.EmailActivities	1.0.0.0	2/16/2018	Unmanaged	Dynamics 365

After successful import of solution, We will get below components into the CRM instance

Solution: MicrosoftLabs.EmailActivities

Components

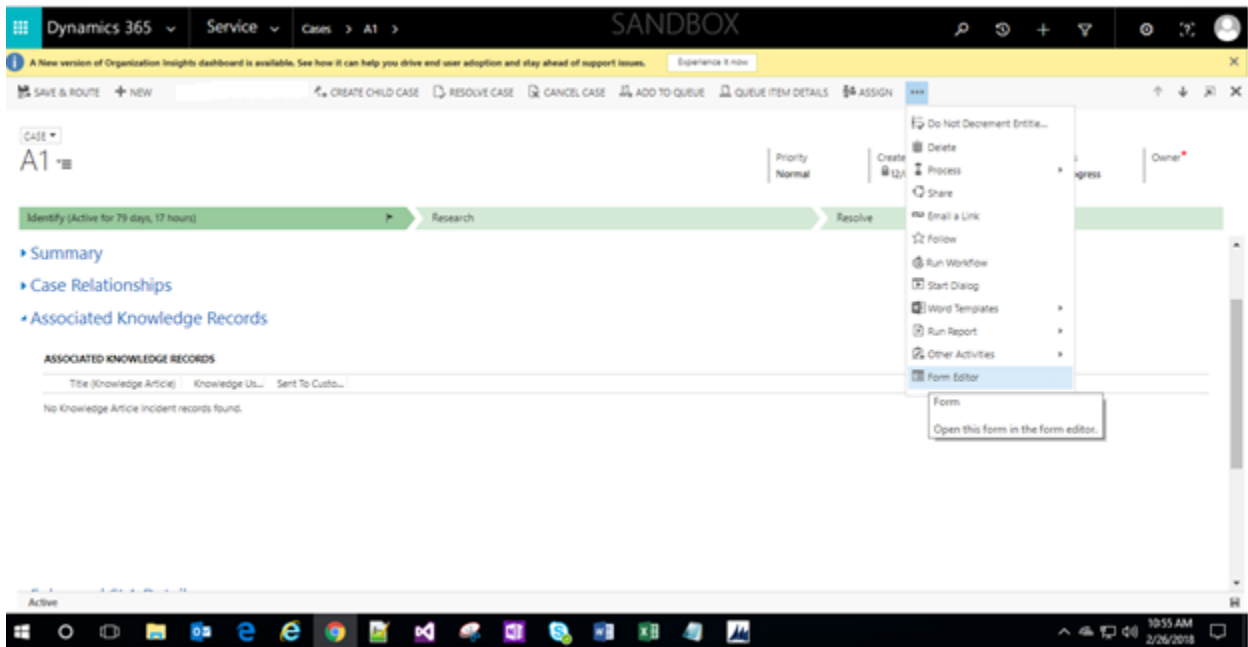
olution MicrosoftLabs.EmailActi...

Component Type All

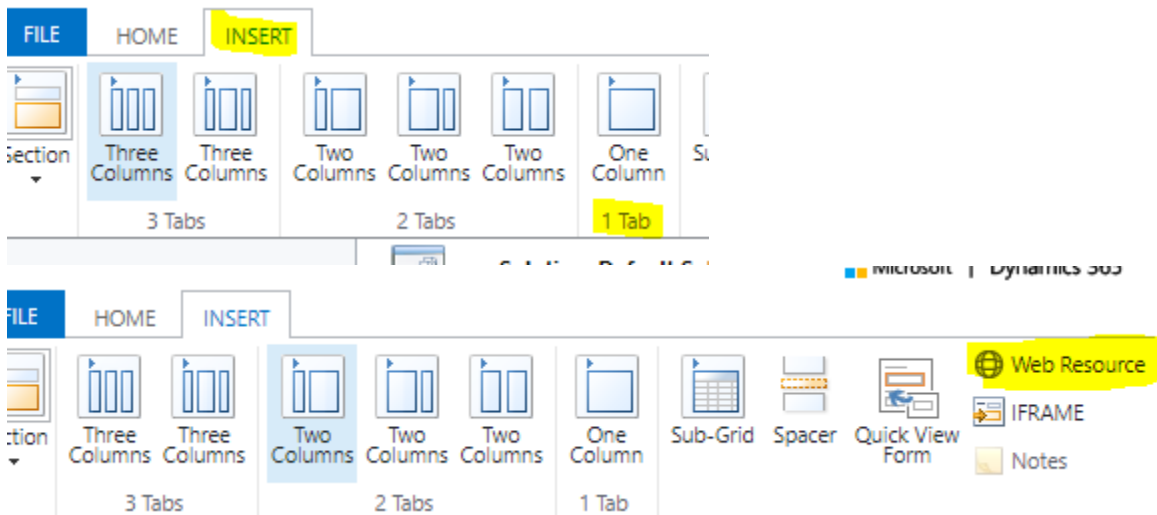
New Add Existing Delete Remove Publish Show Dependencies Add Required Components Managed Properties

Display Name ↑	Name	Type	State	Customizable	Description
Email	email	Entity	Managed	True	Activity that is delivered using ema
msdyn_email	msdyn_email	Web Resource	Unmanaged	True	
msdyn_EmailActivities_Reply.png	msdyn_EmailActivities_Rep...	Web Resource	Unmanaged	True	
msdyn_EmailActivities_ReplyAll.png	msdyn_EmailActivities_Rep...	Web Resource	Unmanaged	True	
msdyn_EmailActivityGrid	msdyn_EmailActivityGrid	Web Resource	Unmanaged	True	
msdyn_EmailDescription	msdyn_EmailDescription	Web Resource	Unmanaged	True	
msdyn_niceedit.js	msdyn_niceedit.js	Web Resource	Unmanaged	True	

Now go to case and open the edit form page to add the web resource of Email Activities Grid.



Under the Case Edit Form add New Tab and insert the web resource.



Web resource popup will open, Select the existing web resource named "***msdyn_EmailActivityGrid***" from lookup and click on OK.(Which will come when import the solution)

Web Resource Properties

? X

Modify this Web resource's properties.

General Formatting Dependencies

Web resource

Web resource *

Field Name and Properties

Name *

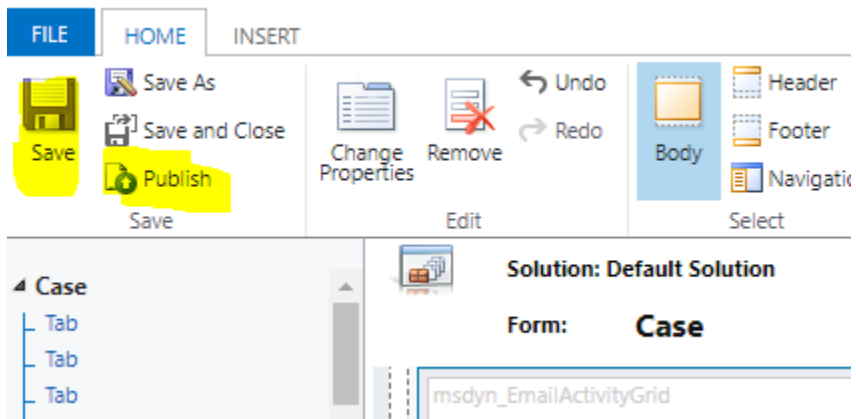
Label *

Display label on the Form

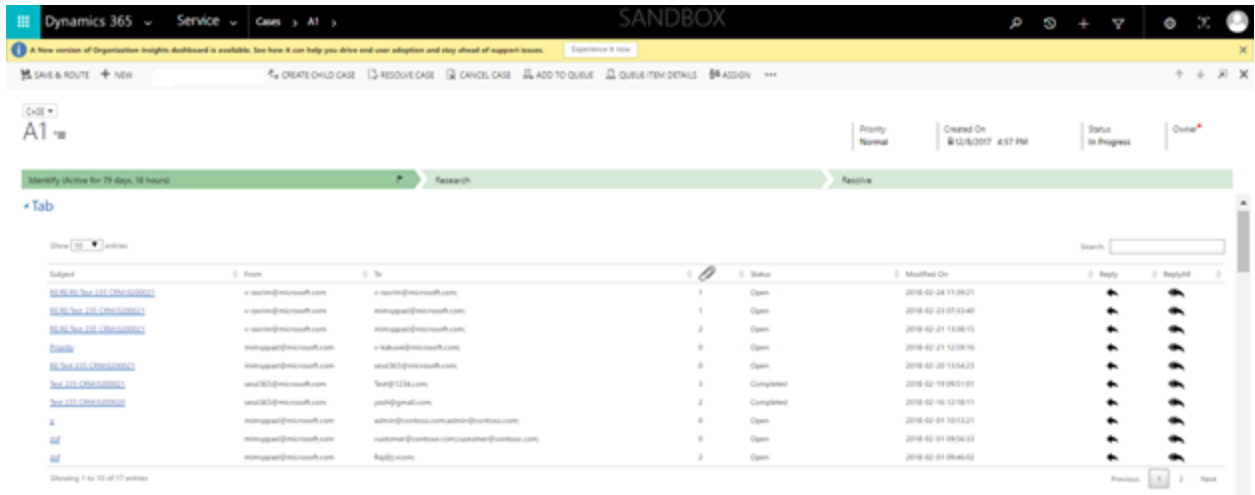
Visibility

Visible by default

Now Save and publish the form.



Refresh the case form to see the email activities Grid.



Under Activities | Email, one new form will be created with the name **“Email_desc”**.

Here in this Email_desc form we can use attachments drag and drop.

Functionality:

Email Activity Grid with Outlook like features

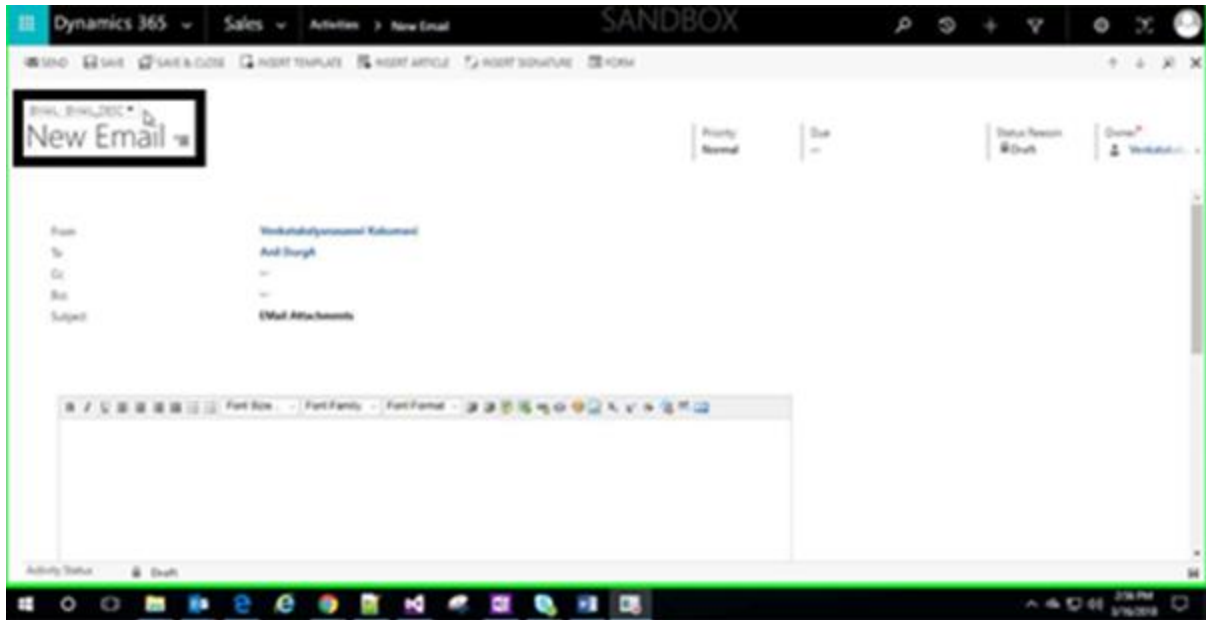
• Email Activities

Subject	From	To	Status	Modified On	Reply	ReplyAll
test CRM:0012010	rdevuat@microsoft.com	v-sgudur@microsoft.com	Sent	2018-03-26 02:36:11	👤	👤
REtest mail CRM:0012004	v-sgudur@microsoft.com	rdevuat@microsoft.com	Received	2018-03-26 17:26:22	👤	👤
REtest mail CRM:0012004	v-sgudur@microsoft.com	v-sgudur@microsoft.com	Received	2018-03-26 17:26:21	👤	👤
REtest mail CRM:0012004	v-sgudur@microsoft.com	rdevuat@microsoft.com	Draft	2018-03-19 21:11:56	👤	👤
REtest mail CRM:0012004	v-sgudur@microsoft.com	rdevuat@microsoft.com	Sent	2018-03-26 17:24:57	👤	👤

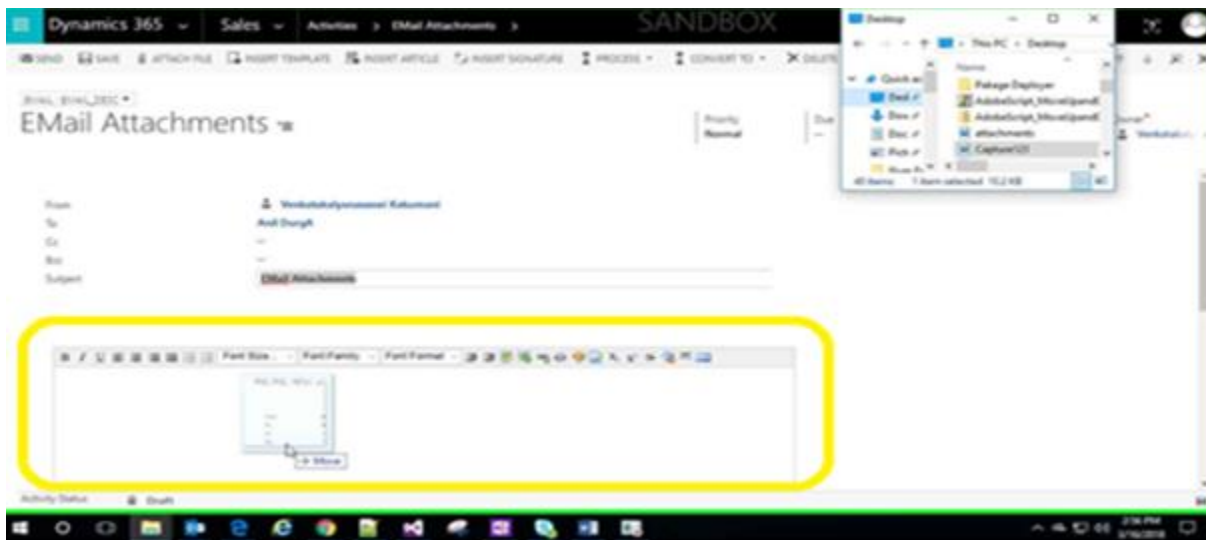
Drag and drop attachments:

When user drag and drop files, it will attach to email. Below are the steps

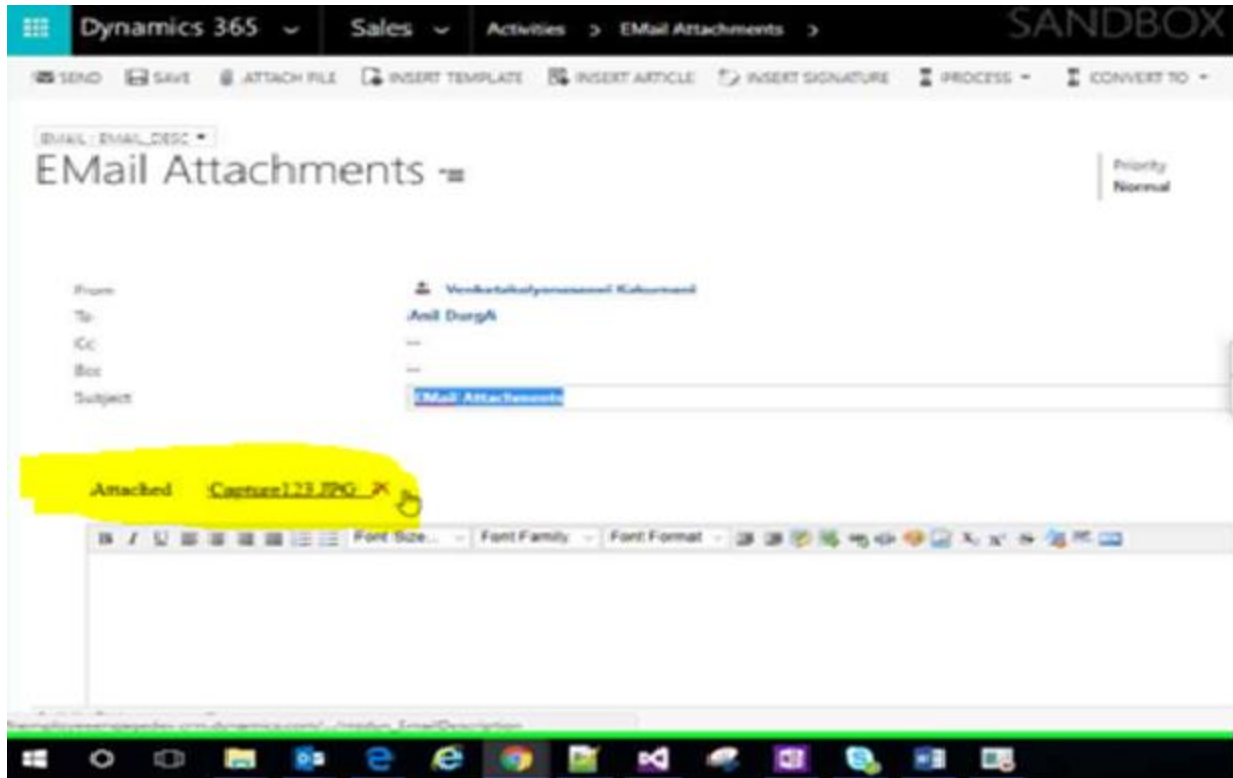
Sales | Activities | New Email | Select Email_desc Form.



Now enter From, TO and subject fields. Now drag and drop any file into the description place as shown in below image (yellow highlighted area)



Now the file will be added to the email as shown in below Screen shot:



Preview the attachment:

When user places the mouse over attachments under Email It will show preview (as of now only images and PDF formats are showing preview)

Download the attachment:

When User clicks on attachments under Email It will, attachment will be downloaded.