PROADDON

PROFESSIONAL ADDONS FOR
HIGH PERFORMERS

ProAddon

Dynamics 365 Solution User Guide

ProHashTag 1.1.82.x

Version 1.0

February, 2019

Table of Contents

List of Figures

1. Use ProHashTag

This section describes how to use ProHashTag to already existing entities. For the entities "Contacts", "Accounts" and "Leads" ProHashTag is preconfigured.

1.1. General

To be able to add and remove HashTags you need to be a member of the security role "ProHashTag Admin".
The role "ProHashTag User" can only use tags that are predefined by an Admin.

HashTags are separated per entity (e.g. contacts, accounts, etc.)., which means you cannot use the same HashTag e.g. for contacts and leads. Anyhow you can still use the same name for another entity. This means, you could for example use the name "Product B Potential" one time to create a HashTag for the entity contact and a second time to create a HashTag for the entity lead.

1.2. Creating HashTags

Applies to UserRole: ProHashTag Admin

A *HashTag* has the following properties:
- Name
  The name shown to the users, visible in the tags input on each record it has been added to.
- Linked entity
  The created *Hashtag* will only be useable and visible in the dropdown for this entity.
- Description (optional)
  A short description what the *HashTag* is used for. The first 50 characters will be visible during hovering over the entity in the tags input on the entity it relates to.

There are 2 ways to create a new HashTag:

1.2.1.   Create a new HashTag in the Settings area

Navigate to Settings / ProHashTag / HashTags

Click on "New" and create a new *HashTag*. It is necessary to name it and state with which entity it is connected.
Optional: Write down a short description for the *HashTag*. This description will then be displayed when hovering over the *HashTag* in the tags input on an entity.

Figure 1: Create a new HashTag

1.2.2.   Create a new HashTag directly in the entity

Navigate to a e.g. Contact Record you want to create a new *HashTag* for

To create a new *HashTag* on the entity form, click into the *Hashtag* area and type the word you want to use as a tag. When no *HashTags* appear in the dropdown, it means this name can be used as new *HashTag*. The *HashTag* will be created by pressing Enter.
Note: Creating a *HashTag* directly in the tags input will give you no optionality to add a description directly. To do so, navigate to Settings / HashTags / <The created HashTag>. Enter here the wanted description.
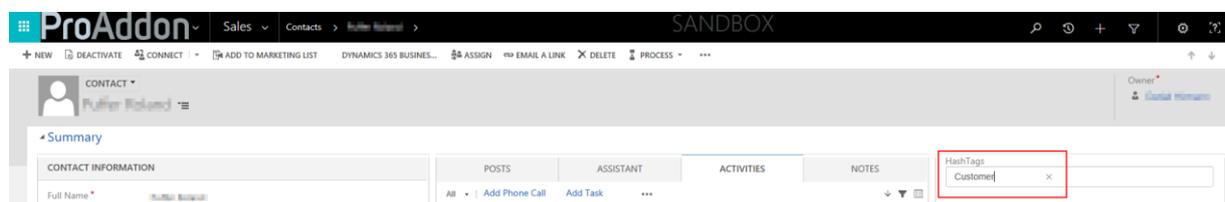
Figure 2: Create and add a new HashTag

1.3.   Adding HashTags to entities

Applies to UserRole: ProHashTag User, ProHashTag Admin

Navigate to a e.g. Contact Record which you want to tag.

To add a *HashTag,* click into the *Hashtag* area and type the name of the existing *HashTag*. A list of matches will appear below the input, simply select the wanted *HashTag*.
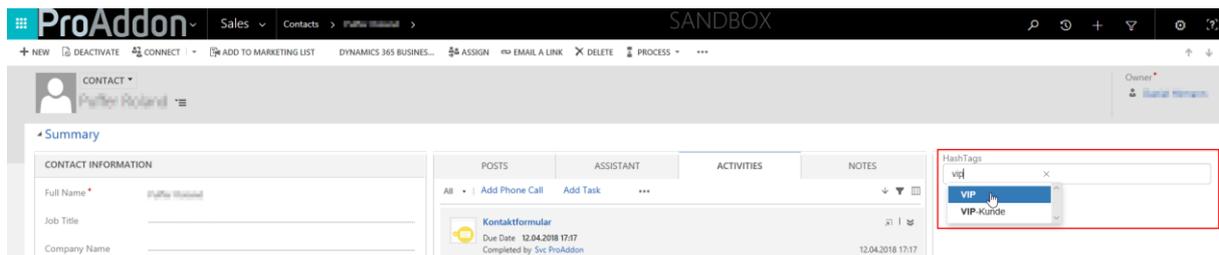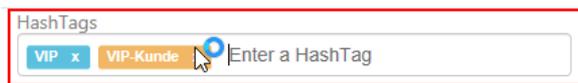

Figure 3: Add a HashTag to an Entity

Figure 4: HashTag states

After a new *HashTag* has been added to an Entity it can be in two states, as seen in Figure 3: Add a HashTag to an Entity, shown with different colors

- Blue state: The connection between the *HashTag* and entity has been created.
- Blinking orange state: The connection between the *HashTag* and entity is being created. This can still result into a failure.
  - *HashTags* in this state cannot be deleted from the entity, until it reaches the "blue" state.

1.4. Create Dynamic marketing lists

1.4.1. Based on a single HashTag

Applies to UserRole: ProHashTagAdmin

Navigate to Settings / ProHashTag / HashTags

Select a *HashTag* and press the ⌷ CREATE MARKETING LIST button. This creates a new dynamic marketing list with the name of the selected *HashTag*.

Note: This is only available for accounts, contacts and leads entities
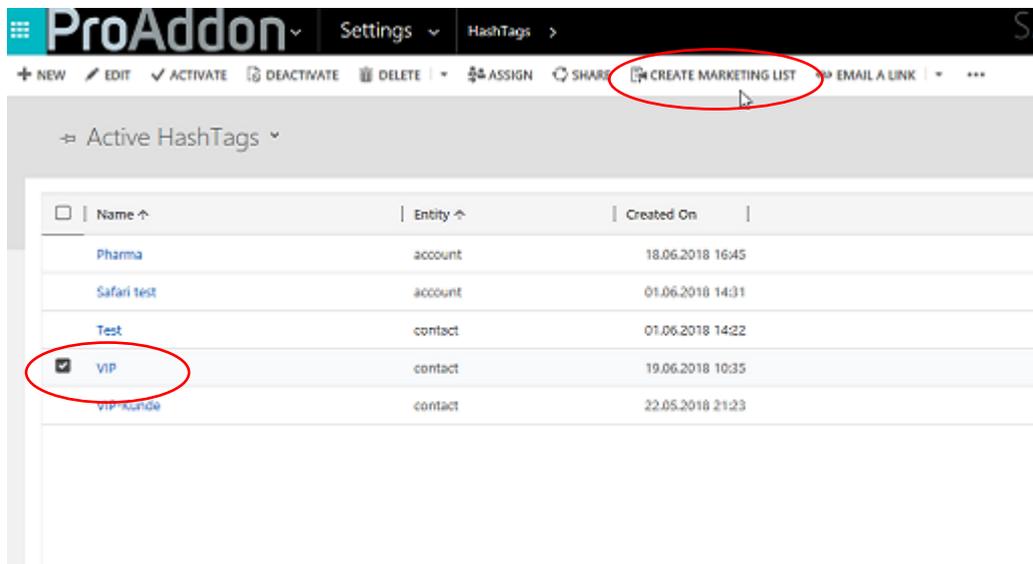

Figure 5: Create a new marketing list

1.4.2. Based on multiple HashTags

Applies to UserRole: ProHashTagAdmin
Create

Navigate to Settings / ProHashTag / HashTags

Select multiple *HashTags* of the same entity and press the CREATE COMBINED ML button. This will create a new dynamic marketing list, with a combination of the selected *HashTags* as name for the marketing list.
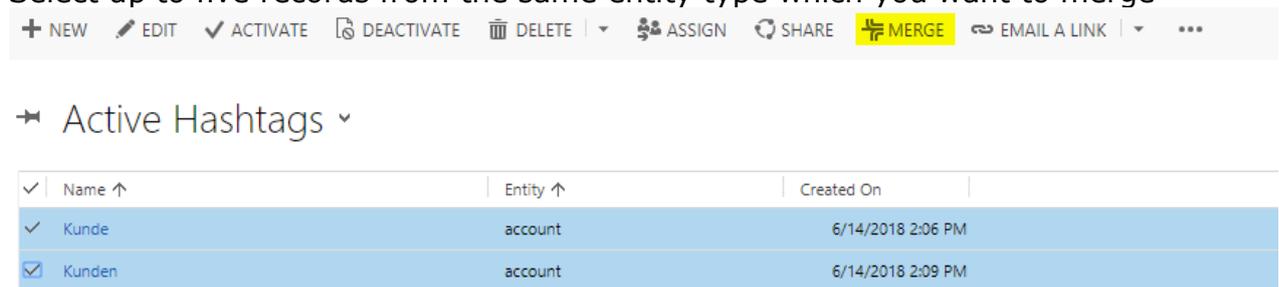
Note: This is only available for accounts, contacts and leads entities.

1.5. Merging HashTags

Applies to UserRole: ProHashTagAdmin

Navigate to Settings / ProHashTag / HashTags

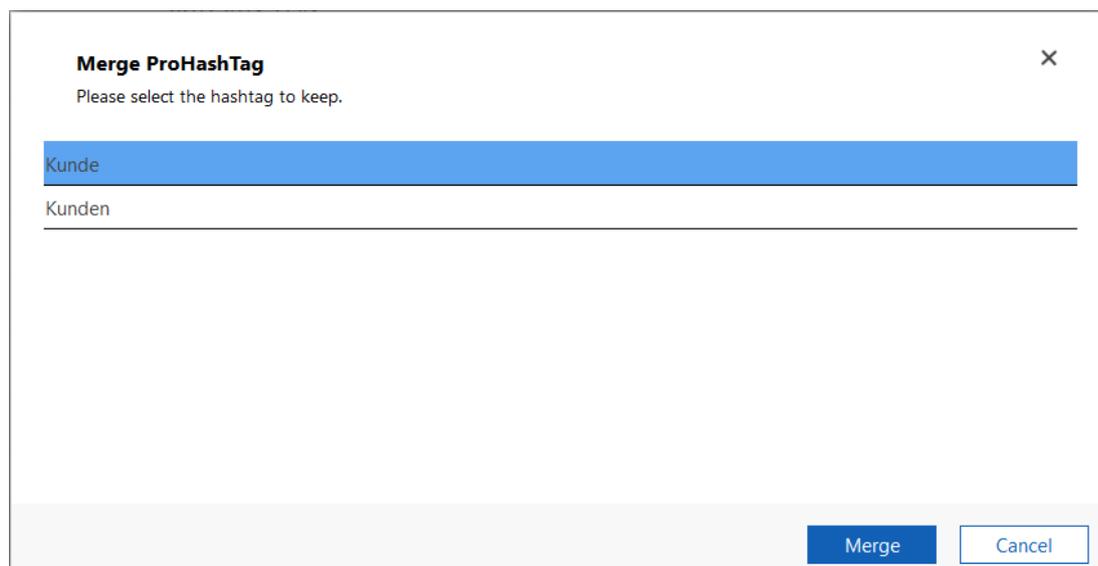Select up to five records from the same entity type which you want to merge

Figure 6: Merge HashTags

Click the "Merge" Button and select the *HashTag* you want to keep

Figure 7: Select record to merge HashTags

1.6.　　Remove HashTags

Applies to UserRole: ProHashTagAdmin

Navigate to Settings / ProHashTag / HashTags

Select the records which you want to remove and click the Button "Deactivate"

The *HashTag* will be deactivated, the Tag will be removed on all records (e.g. Contacts, Accounts, etc.)

1.7.　　Import HashTags

Applies to UserRole: ProHashTagAdmin

By using the standard Dynamics 365 import functionality for contacts, accounts or leads you can import entities already connected with *HashTags* by using the field "pht_import" (Tag Import).
Multiple *HashTags* can be imported with the ";" as a delimiter.

1.8.　　Add ProHashTag to other Entities

Applies to UserRole: CRM System Customizer

Navigate to Settings / Customizations / Customize the System

Open the form of the entity you want to add ProHashTag to.

Add a new Web Resource to the form. The Web Resource source is `pht_/tagsinput/tagsinput.html`.

Set the formatting of the Web Resource as following:

> Number of Rows: 1
> Automatically expand to use available space
> Scrolling: Never
> No border

2. Support, Feedback

We are happy to hear from you! If you have any questions, don't hesitate to contact us: support@proaddon.com