ActivityTools
for
Microsoft Dynamics CRM

ActivityTools

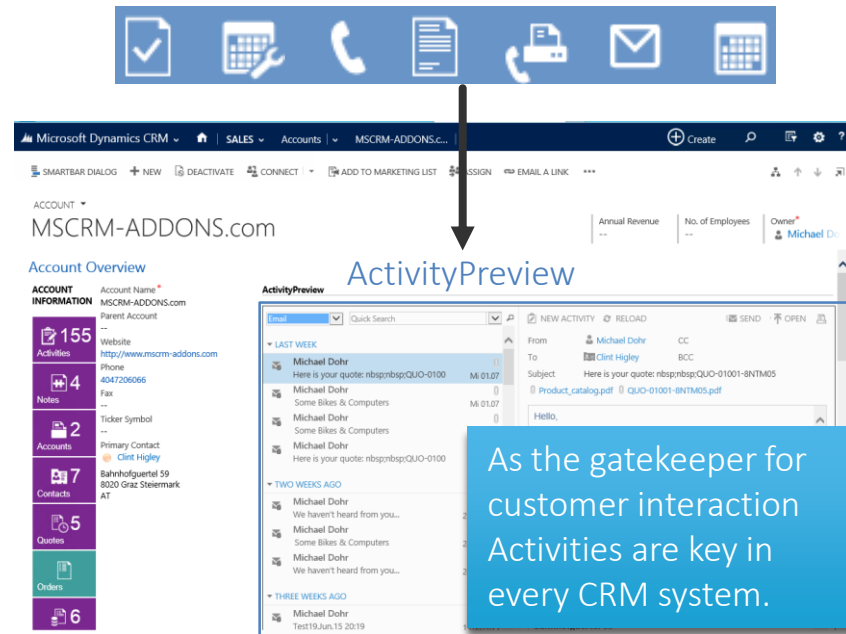## Why would I use it?

Increase productivity by providing tools to handle activities more efficiently

- Visualization
    - Outlook like view of activities
    - Quick and Advanced Search
    - All activity-types supported (including custom activities)
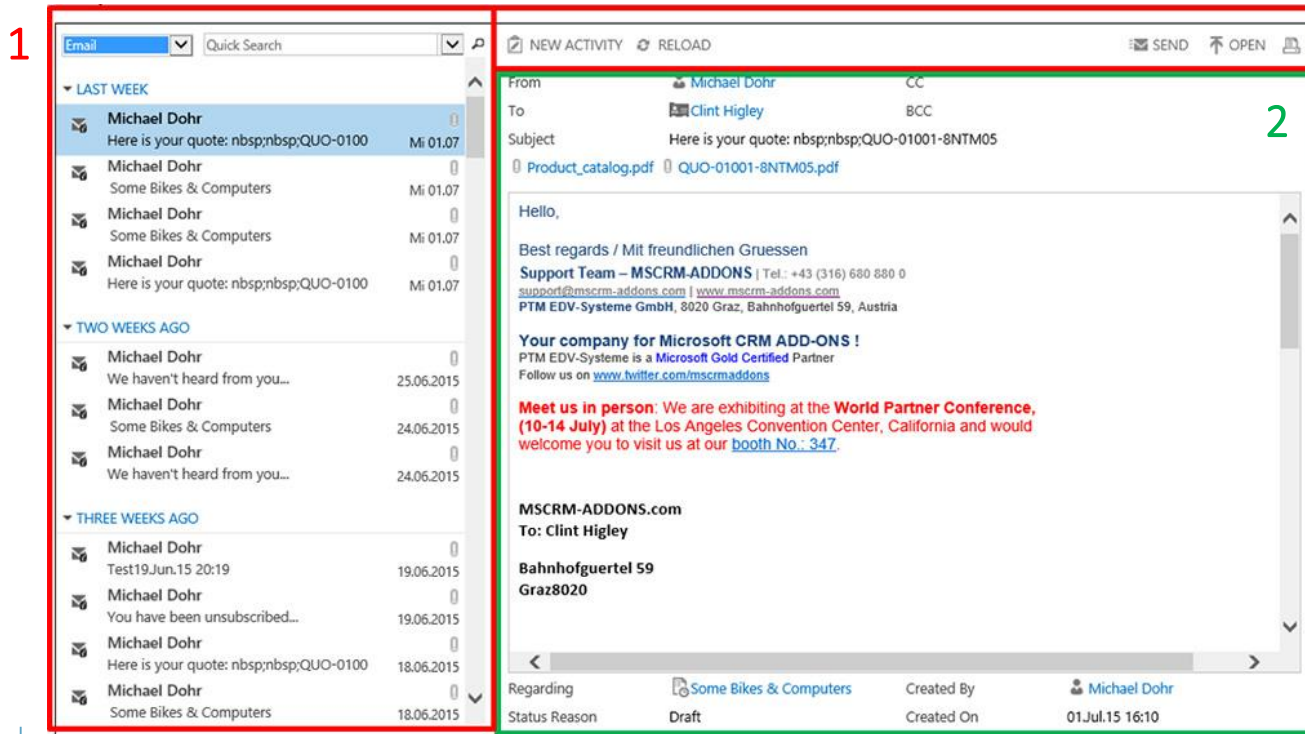
- Email Features
    - Define personal Email signatures
        - HTML or Plain Text
    - Define default signatures/senders

As the gatekeeper for customer interaction Activities are key in every CRM system.

ActivityPreview

Activity-Preview

The Outlook like experience when handling activities in Dynamics CRM

1. **Overview (Left Pane, marked red)**
   - List of activities (standard & custom)
   - Search capabilities

2. **Preview (Right Pane, marked green)**
   - Direct access to attachments and related records (from,to,cc,bcc…)
   - Customizable layout

ActivityTools

- <u>Signature Editor (Accessible on CRM User Form</u>
  - Create personalized signatures for Users or teams. (Plain Text and HTML supported)
  - Define default senders (Support or Sales teams)

How to Deploy to CRM

Deploy to CRM forms, the SocialPane or add Activity Tools to the NavBar

- Embed into Entity Forms or Social Pane

- Embed into CRM NavBar by referencing the „ptm_ActivityTools/Mainpage.html" webresource

Retail – Pricing

Perpetual license

Component	Price / license	Support & Maintenance*
Per Site license (must cover all active users)	$ 50	$ 17
Per User license (minimum of 10 users)	$ 100	$ 34

*Support & Maintenance is included for the first year

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