



mscrm-addons.com
Your company for MS-CRM ADD-ONS!

ActivityTools
for
Microsoft Dynamics CRM

ActivityTools

Goal: Simplify activity handling inside Microsoft Dynamics CRM

Why would I use it?

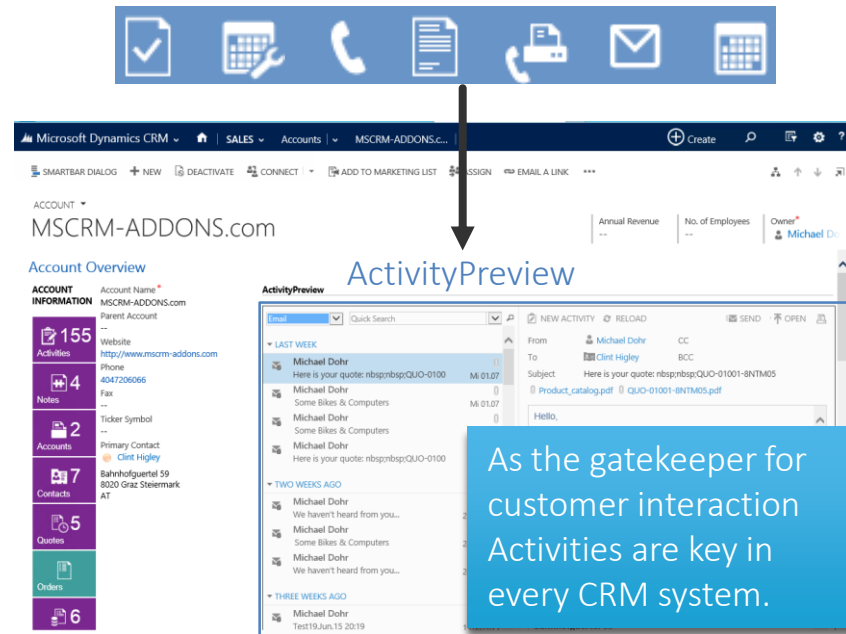
Increase productivity by providing tools to handle activities more efficiently

- Visualization

- Outlook like view of activities
- Quick and Advanced Search
- All activity-types supported (including custom activities)

- Email Features

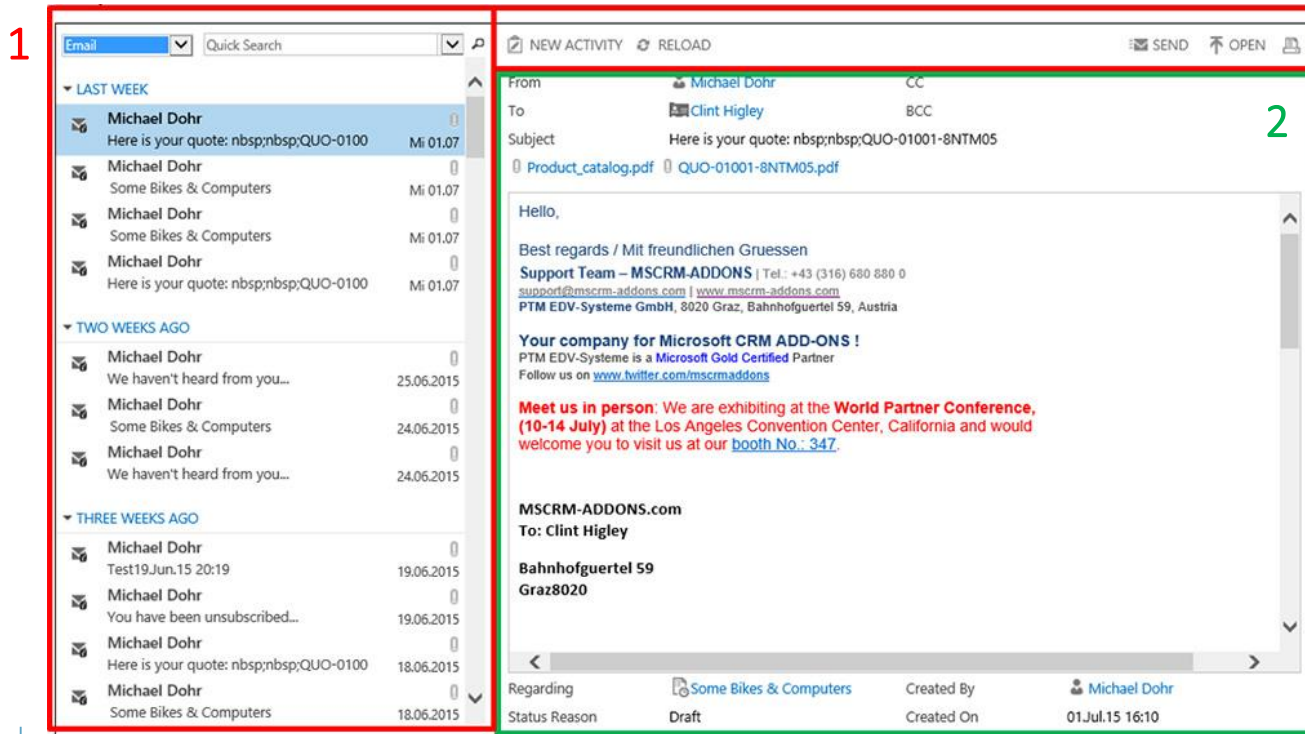
- Define personal Email signatures
 - HTML or Plain Text
- Define default signatures/senders



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

Email Features

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

ActivityTools Signature Editor for User **Michael Dohr**

Settings

General Options

Use Options

Maximize On Open

Sender

Signature

Signature Options

Use Signature

- Insert Default Signature

```
<div style="font-family: arial; color: #11497d; font-size: 10pt;">Hello</div>  
<div style="font-family: arial; color: #11497d; font-size: 10pt;"><br />  
<span style="font-family: arial;">Best regards / Mit freundlichen Gruessen<br />  
</span></div>  
<table border="1" style="width: 462px; font-family: arial; height: 167px; border-collapse: collapse; border: none;">  
<tbody>  
<tr>  
<td style="height: 165px;">  
<div style="font-family: arial; color: #11497d; font-size: 9pt;"><strong> Support Team &ndash; MSCRM-ADDONS</strong> <span style="font-family: arial;"> <span style="color: #777777; font-size: 8pt;">|</span> <span style="color: #a9a9a9; font-size: 8pt;"> </span> </span> <span style="font-family: arial; color: #777777; font-size: 8pt;"> Tel: +43 (316) 680 880 0<br />  
</div> <a href="mailto:support@mscrm-addons.com"> <span style="font-family: arial; color: #777777; font-size: 8pt;"> support@mscrm-addons.com</span> </a> <span style="font-family: arial; color: #777777; font-size: 8pt;"> &nbsp;<br />  
<span style="font-family: arial; color: #777777; font-size: 8pt;"> <span style="font-family: arial; color: #777777; font-size: 8pt;"> www.mscrm-addons.com</span></a> <br />  
<span style="font-family: arial; color: #11497d; font-size: 8pt;"> <span style="font-family: arial;"> PTM EDV-Systeme GmbH</span> <span style="font-family: arial;"> <span style="color: #404040; font-size: 8pt;"> 8020 Graz, Bahnhofguelte 59, Austria</span> <br />  
</td>  
</tr>  
</tbody>  
</table>  
<div style="font-family: arial; color: #11497d; font-size: 10pt;">Your company &nbsp; Microsoft CRM &nbsp; ADD-ONS |</div>  
<div style="font-family: arial;"> <span style="color: #404040; font-size: 8pt;"> PTM EDV-Systeme is a <span style="color: #0000ff; font-size: 8pt;"> Microsoft Gold Certified</span> <span style="color: #404040; font-size: 8pt;"></div>  
<div style="font-family: arial;"> <span style="font-size: 8pt;"> Partner</span> <span style="font-size: 8pt;"> </div>  
<div style="font-family: arial; color: #404040; font-size: 8pt;"> Follow us on <a href="http://www.twitter.com/mscrmaddons"> www.twitter.com/mscrmaddons</a> </div>  
<div style="margin-top: 10pt; color: red; font-size: 10pt;"> <b> Meet us in person</b>: We are exhibiting at the <b> World Partner Conference <br />  
(10-14 July)</b> at the Los Angeles Convention Center, California and would welcome you to visit us at our <a href="http://www.mscrm-addons.com/Expo/tabid/149/Default.aspx"> booth No: 347</a> .</div>  
</div>  
<td style="height: 165px;">&nbsp;</td>
```

Save | Cancel

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

The screenshot shows a CRM interface for a lead named Darren Gehring. The lead is currently in the 'Qualify (Active)' stage. The interface includes a summary section with contact and company details, and a central 'ACTIVITIES' pane showing a list of recent interactions. A right-hand pane displays details for a specific activity.

LEAD ▾
DARREN Gehring

Lead Source: Other | Rating: Hot | Status: New | Owner: Michael D

Qualify (Active) | Develop | Propose | Close | Next Sta

Summary

CONTACT

Topic * Mailed an interest card back for road bikes
Name * DARREN Gehring
Job Title Owner
Business Phone 123654877
Mobile Phone 555-6897
Email someone@example.com
[Open Calendar](#)

COMPANY

Company * Journey Sporting Goods
Website --
Address 5431 180th Ave SW
Bellevue, WA 20935
U.S.

ACTIVITIES NOTES

All (23) Search

NEW ACTIVITY RELOAD OPEN

Call From Michael D Phone Number 123654877
To DARREN G Direction Outgoing
Subject Convergence FU -key leads
vers interested

Regarding DARREN G Created By Michael D
Open

Activity	Date
Michael Dohr	04.05.2015
Michael Dohr	04.05.2015
Michael Dohr	04.05.2015
Michael Dohr	19.03.2015
Michael Dohr	19.03.2015
Michael Dohr	19.03.2015
Michael Dohr	19.03.2015
Michael Dohr	19.03.2015

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

Retail – Pricing

Perpetual License

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

Contact US

Support & Contact

- You can find us on the web at <http://www.mscrm-addons.com>
- Help-Center (Live-Chat, Support): <http://www.mscrm-addons.com/Support.aspx>
- Do not forget we have an awesome blog at <http://blogs.mscrm-addons.com>!



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