



# D365 Modern Email Interface

D365 Modern Email Interface is a solution providing inline options in case/ contact form enabling organization and management of emails in the same page in Dynamic 365 CRM.

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## Overview:

This Solution is an add-on feature to Dynamics 365 CRM to providing efficient and user friendly Email management service. It enables user to draft and manage all of the sent and received email messages within a case,contact or any other activity enabled entity. Furthermore, this solution provides organizations to manage their case specific emails within the same page without having to navigate to different windows or tabs thus facilitating navigation within a case or contact effectively.

### **Email Activity Management features and benefits:**

- Email management is possible in the same page on case,contact or any other activity enabled entity.
- Different views of the emails allowing better access and *normalization/organization*.
- Filtering options based on time line, priority and attachments.
- Prioritizing and filtering emails based on set priorities.
- Quicker drafting of emails using predefined email templates option.
- *Easy attachment handling with drag and drop feature.*

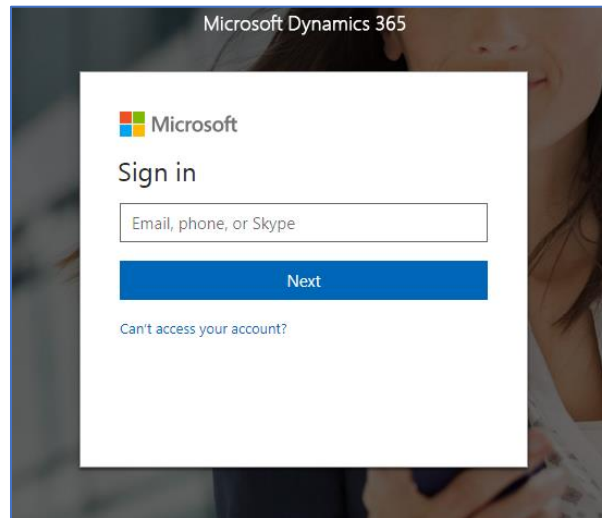
This solution, built on Dynamics 365, seamlessly works with Dynamics CRM 2016 version and later versions.

# D365 Modern Email Interface Configuration

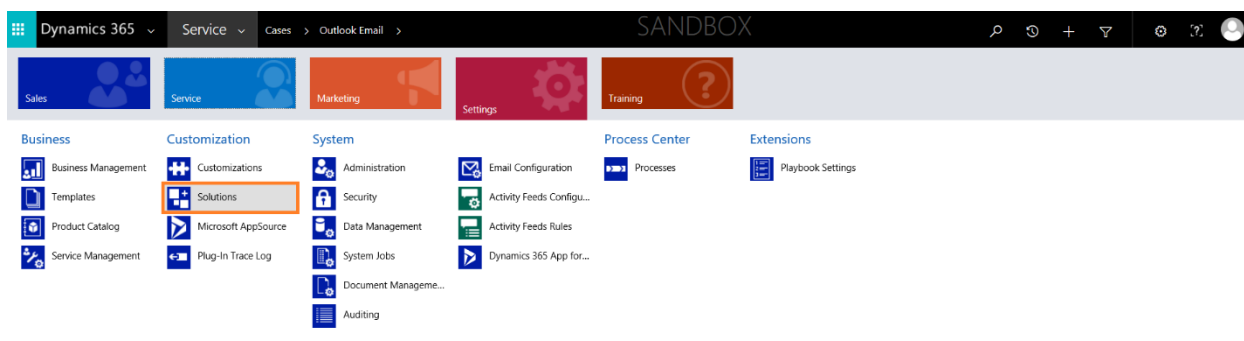
The Email Management solution can be used in case, contact or any other entities. This section outlines the steps to be performed by a System Administrator to make Solution available in Dynamics 365 CRM to the end users.

## UI Configuration

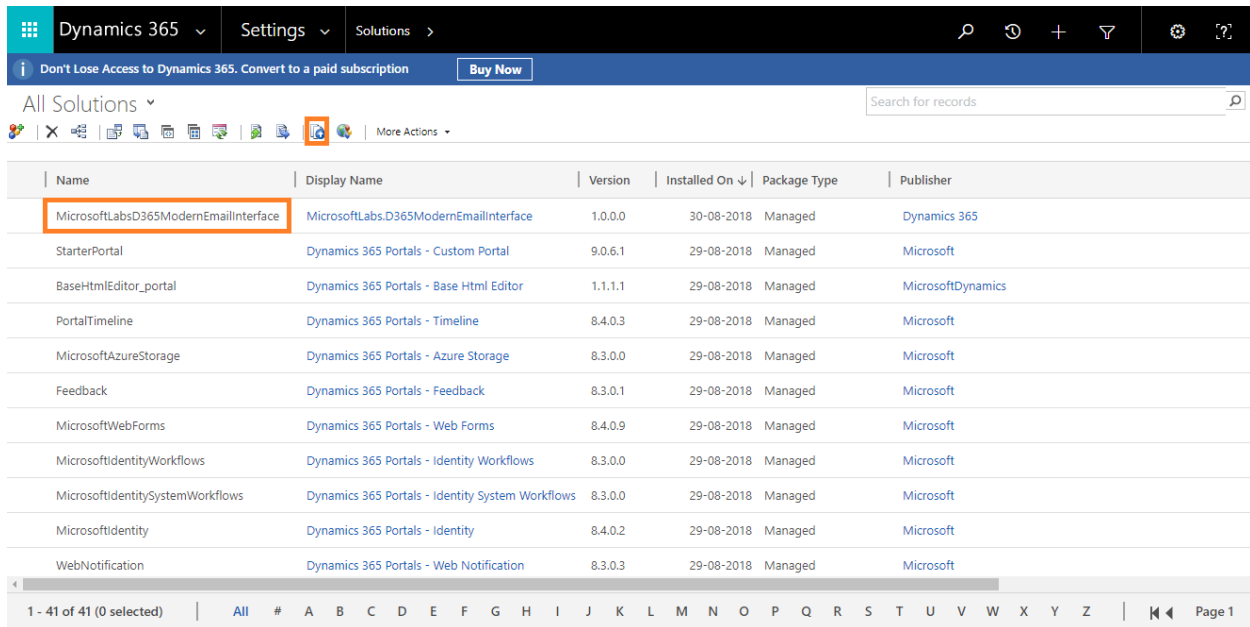
1. Log into CRM instance by giving the appropriate username and password with **admin** role.



2. After a successful login, Navigate to **Settings** -> **Solutions**.

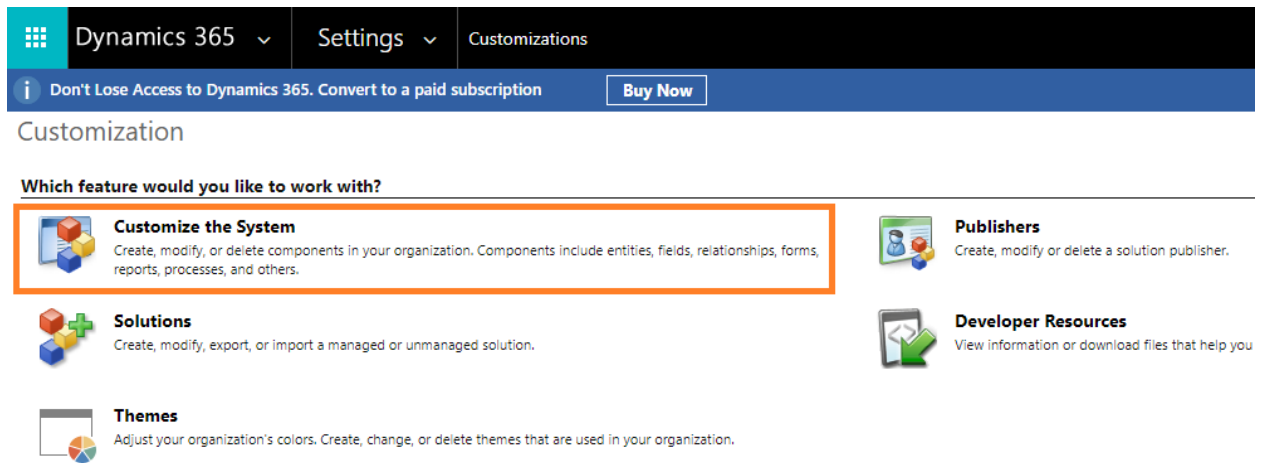


3. Now **import** D365 Modern Email Interface and **Publish** to avail the customizations.



Name	Display Name	Version	Installed On	Package Type	Publisher
MicrosoftLabsD365ModernEmailInterface	MicrosoftLabs.D365ModernEmailInterface	1.0.0.0	30-08-2018	Managed	Dynamics 365
StarterPortal	Dynamics 365 Portals - Custom Portal	9.0.6.1	29-08-2018	Managed	Microsoft
BaseHtmlEditor_portal	Dynamics 365 Portals - Base Html Editor	1.1.1.1	29-08-2018	Managed	MicrosoftDynamics
PortalTimeline	Dynamics 365 Portals - Timeline	8.4.0.3	29-08-2018	Managed	Microsoft
MicrosoftAzureStorage	Dynamics 365 Portals - Azure Storage	8.3.0.0	29-08-2018	Managed	Microsoft
Feedback	Dynamics 365 Portals - Feedback	8.3.0.1	29-08-2018	Managed	Microsoft
MicrosoftWebForms	Dynamics 365 Portals - Web Forms	8.4.0.9	29-08-2018	Managed	Microsoft
MicrosoftIdentityWorkflows	Dynamics 365 Portals - Identity Workflows	8.3.0.0	29-08-2018	Managed	Microsoft
MicrosoftIdentitySystemWorkflows	Dynamics 365 Portals - Identity System Workflows	8.3.0.0	29-08-2018	Managed	Microsoft
MicrosoftIdentity	Dynamics 365 Portals - Identity	8.4.0.2	29-08-2018	Managed	Microsoft
WebNotification	Dynamics 365 Portals - Web Notification	8.3.0.3	29-08-2018	Managed	Microsoft

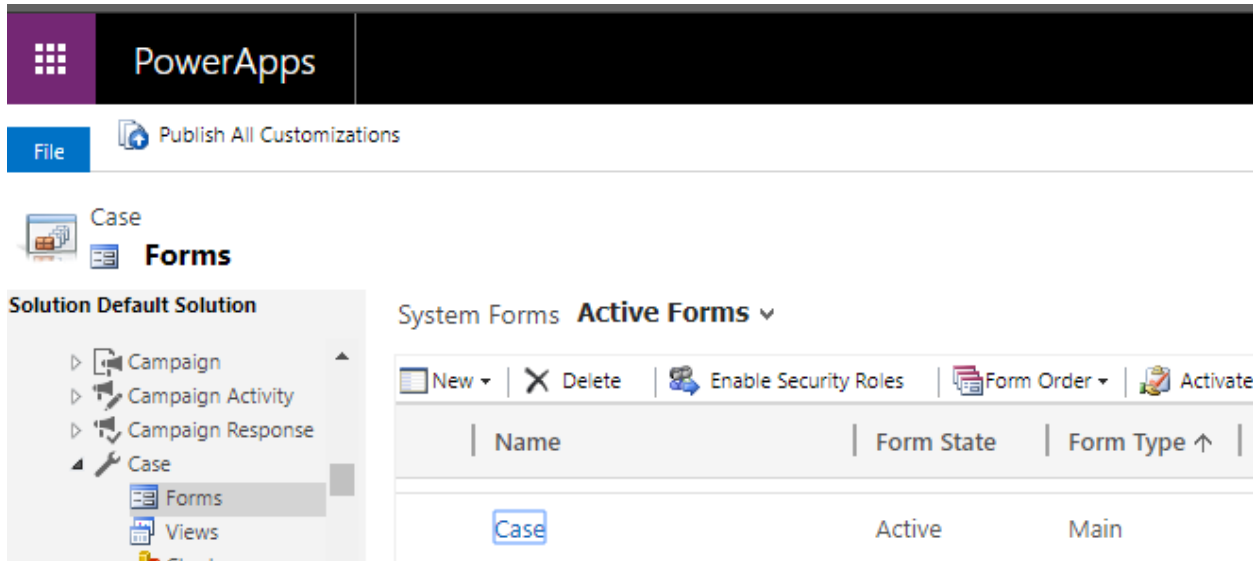
4. After successful import of the solution, go to **Settings>customization>customize the system**. Now select **Case** (entity where you need to add this Email Interfaces) and select the desired **form**. Now it will open Case customization form.



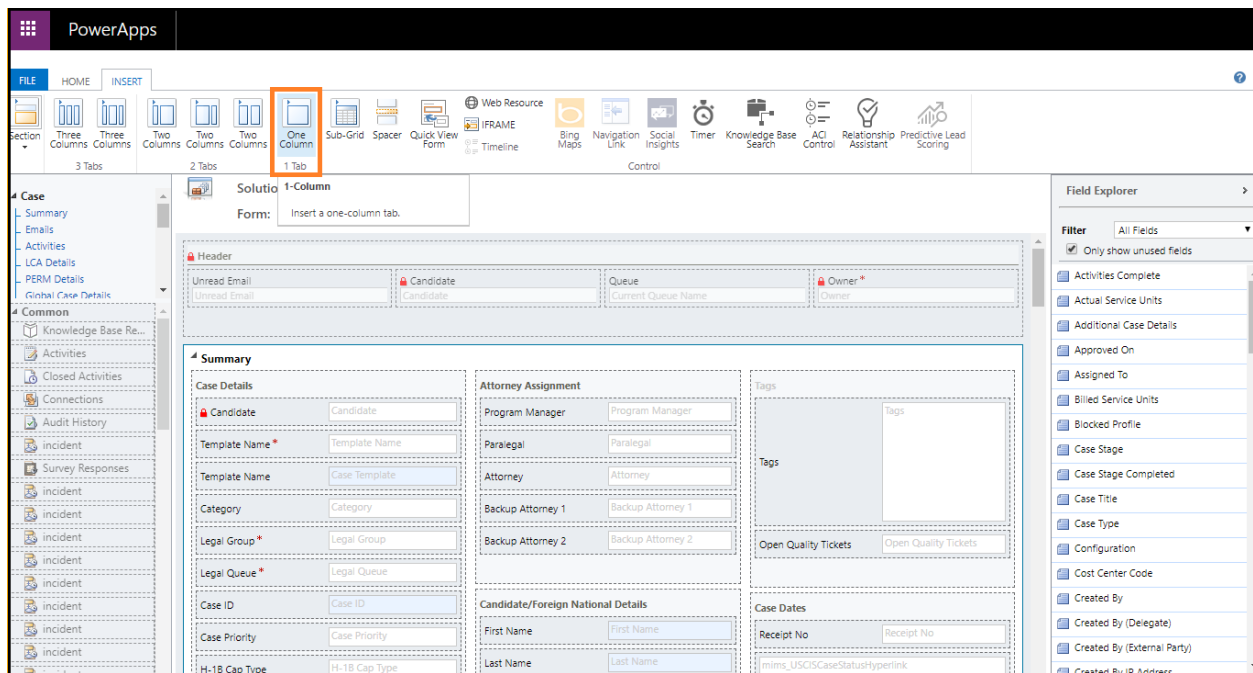
**Customization**

Which feature would you like to work with?

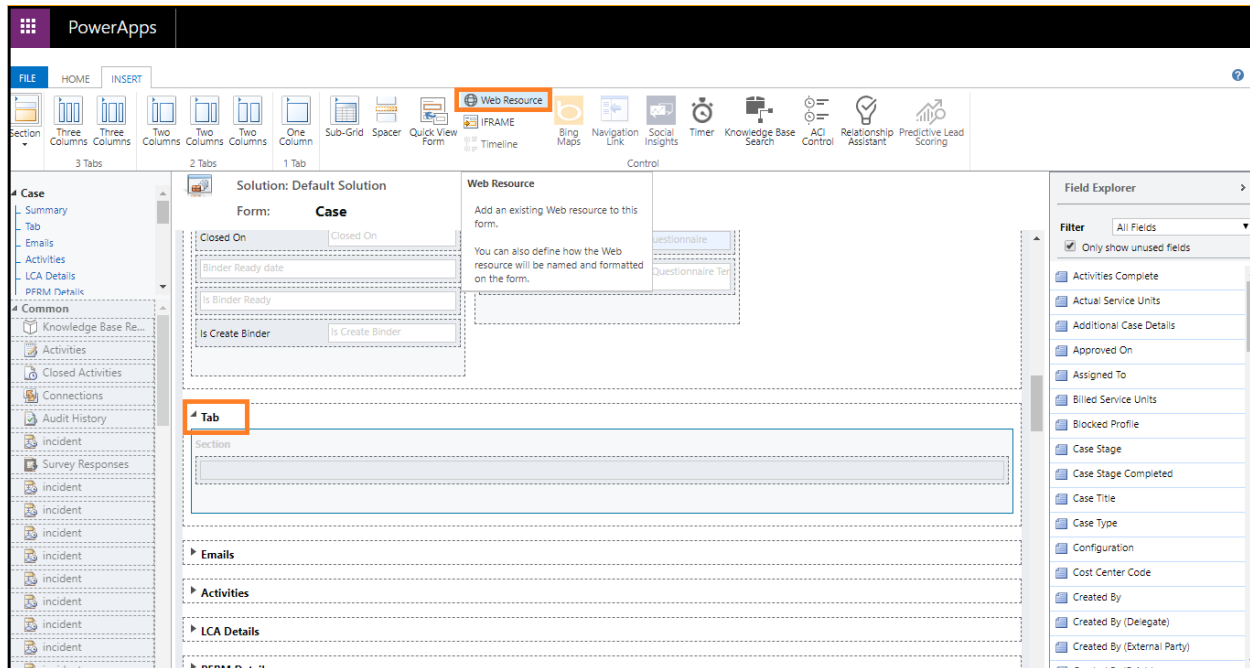
- Customize the System**  
Create, modify, or delete components in your organization. Components include entities, fields, relationships, forms, reports, processes, and others.
- Publishers**  
Create, modify or delete a solution publisher.
- Solutions**  
Create, modify, export, or import a managed or unmanaged solution.
- Developer Resources**  
View information or download files that help you
- Themes**  
Adjust your organization's colors. Create, change, or delete themes that are used in your organization.



5. Click on **Insert** tab and choose the option **One column**.



- Click on the newly added one column tab and then click on the option **Web Resource**.



- Web resource popup will open, Select the existing web resource named "msdyn\_D365EmailActivity" from lookup. Also fill field name and properties section.

## Add Web Resource

Add an existing web resource to the Form.



General

Formatting

Dependencies

Web resource

Web resource \*

msdyn\_D365EmailActivity

Field Name and Properties

Name \*

WebResource\_

Label \*

☐ Display label on the Form

Visibility

☒ Visible by default

☐ Enable for mobile

Web Resource Properties

Custom Parameter(data)

☐ Restrict cross-frame scripting, where supported.

☐ Pass record object-type code and unique identifier as parameters.

OK

Cancel

- Now go to formatting Tab and fill below highlighted fields and click ok. This aligns the tab in the form.



### Add Web Resource

Add an existing web resource to the Form.

☐ Two columns
 ☐ Three columns
 ☐ Four columns

**Row Layout**  
 Select the number of rows the control occupies.  
 Number of Rows:   
☐ Automatically expand to use available space.

**Scrolling**  
 Select the scrolling type for the IFRAME.  
 Scrolling:

**Border**  
 Specify whether a border is displayed.  
☐ Display border

OK Cancel

- To name the newly created tab, click on the tab **Home** and then click on the new **Tab** and then **Change Properties**. The below pop up opens up and mark the **Label** field with the desired tab name.

PowerApps

FILE HOME INSERT

Save Save As Save and Close Publish Change Properties Remove Undo Redo Header Footer Body Footer Navigation Select

Solution: Default Solution

Form: Case

Is Create Binder Is Create Binder

Tab

Section

modyn\_OutlookEmailActivity

### Tab Properties

Modify this tab's properties.

Display Formatting Events

**Name**  
 Specify a unique name.  
 \*Name:   
 \*Label:   
☒ Show the label of this tab on the Form  
☒ Expand this tab by default

**Visibility**  
 Specify the default visibility of this tab.  
☒ Visible by default

**Availability**  
 Specify the default availability of this tab on phone.  
☒ Available on phone

OK Cancel

Field Explorer

Filter: All Fields

☒ Only show unused fields

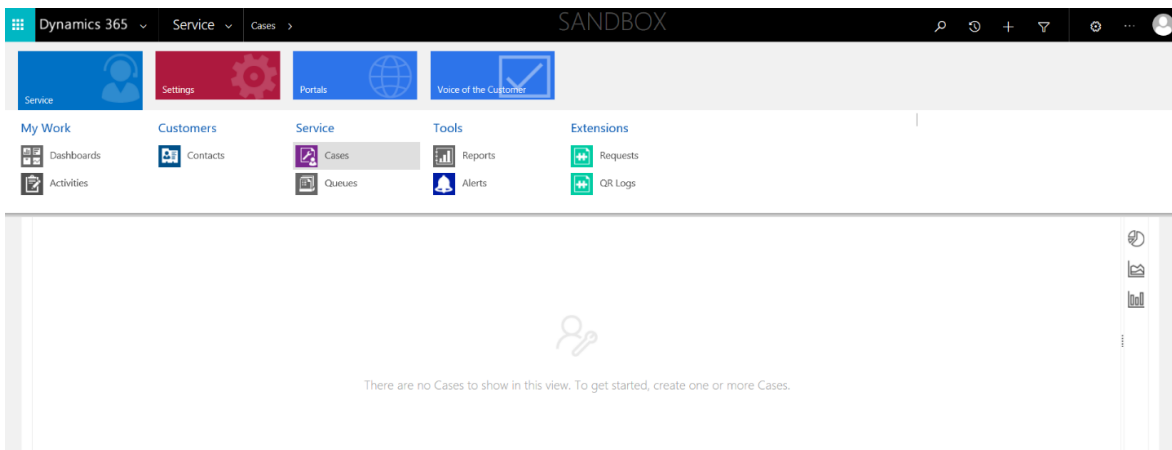
- Activities Complete
- Actual Service Units
- Additional Case Details
- Approved On
- Assigned To
- Billed Service Units
- Blocked Profile
- Case Stage
- Case Stage Completed
- Case Title
- Case Type
- Configuration
- Cost Center Code
- Created By
- Created By (Delegate)
- Created By (External Party)

10. Save and publish the form.

11. Refresh the UI form in the case to see the newly created **Email** tab.

## User Experience

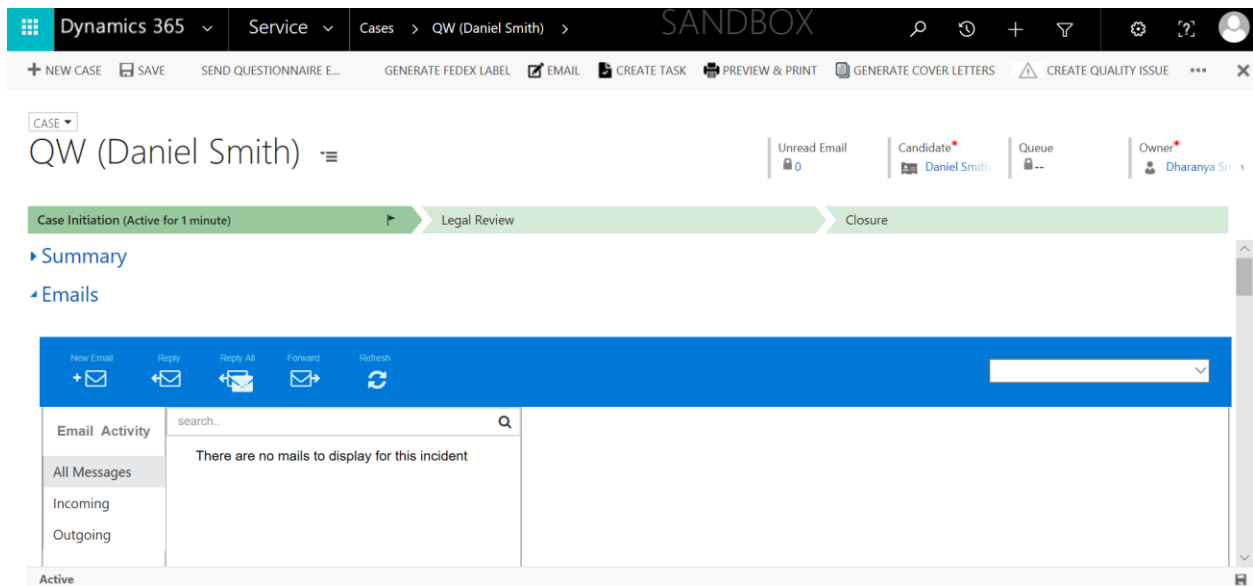
1. Navigate to **Services** -> **Cases**.



2. The **Active cases** view opens up listing all the active cases assigned to the current user.

Case ID	Full Name (Candidate)	Case Priority	Candidate	Current Case Stage	Case Stage Completed	Unread Email	Status Reason
CAS-01029-V9Y6H2	. Aga Ali Jaffer	Normal	. Aga Ali Jaffer				In Progress
CAS-01031-R0W0B5	. Anil Purushotham	Normal	. Anil Purushotham				In Progress
CAS-01032-Y2G9Q8	. Aga Ali Jaffer	Normal	. Aga Ali Jaffer				In Progress
CAS-01033-Y2W7C4	. Aga Ali Jaffer	Normal	. Aga Ali Jaffer				In Progress
CAS-01034-G2W1M4	. Aga Ali Jaffer	Normal	. Aga Ali Jaffer				In Progress
CAS-04295-R9C7Y8	Dharanya Srinivasan	Normal	Dharanya Srinivasan	Case Initiation -		0	In Progress

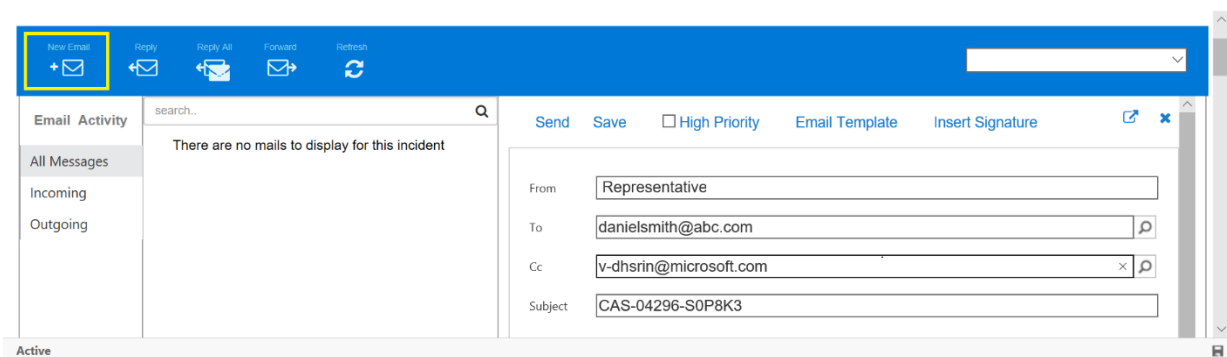
3. Double Click on any case record and we will be able to see the email management solution as a separate tab named as **'Email'**.



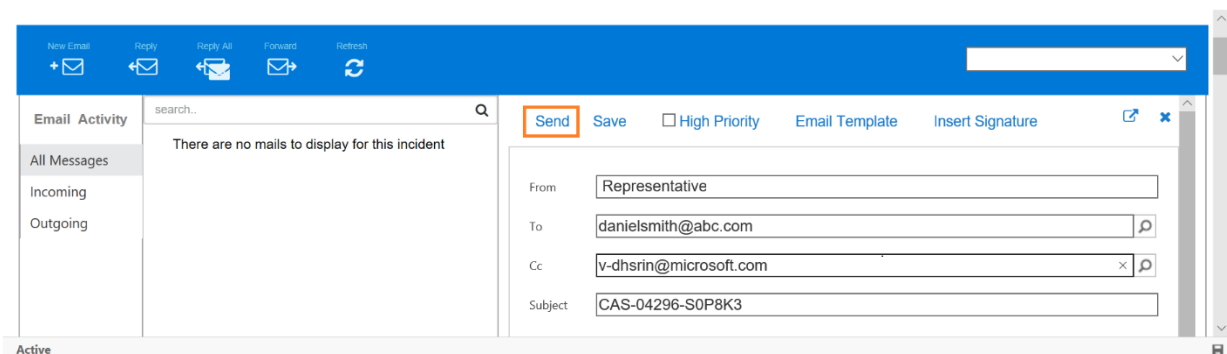
## Email Management Features

### Emailing options

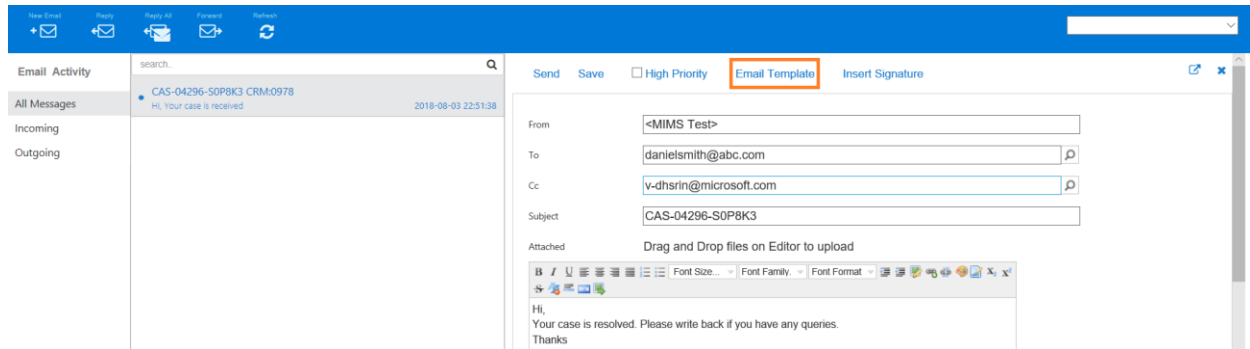
1. Click on **New Email** button on the ribbon header to create a new Email.



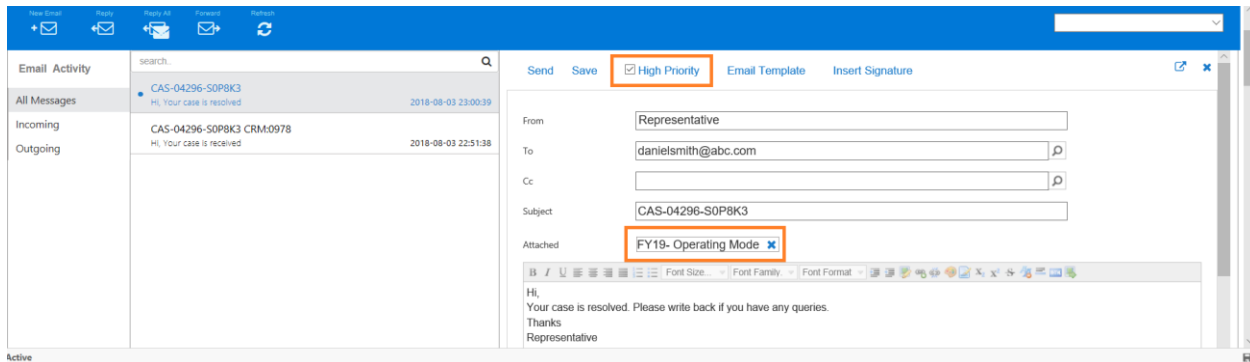
2. Draft the email, add the recipients and click on **Send** to send an Email.



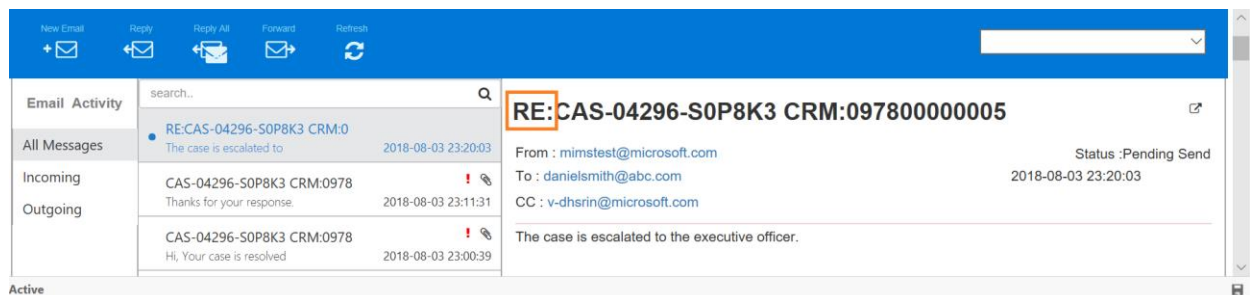
3. You can also add predefined emails by clicking on Email Template and choosing the appropriate email.



4. Drag and drop the files on the editor to upload the documents as **Attachments**. The priorities can be marked using the **High Priority** check box.

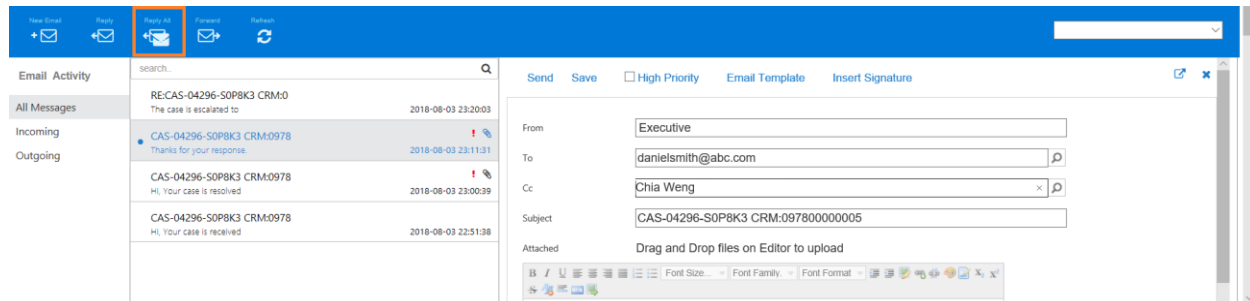


5. Click on **Reply** button to reply to an Email.
  - a. **To** address will be auto populated from the existing details and
  - b. **Subject** is appended with **RE:** as prefix in the subject line after email is posted.

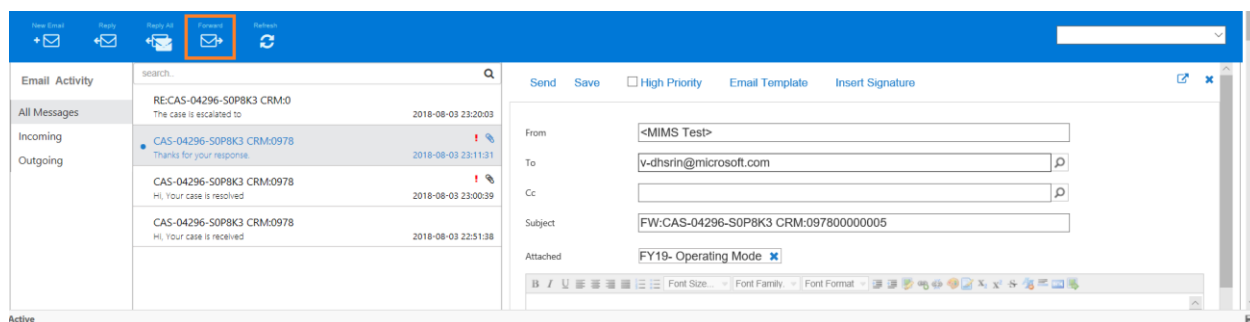


6. Click on the **Reply All** button on the ribbon header to reply everyone in the Email

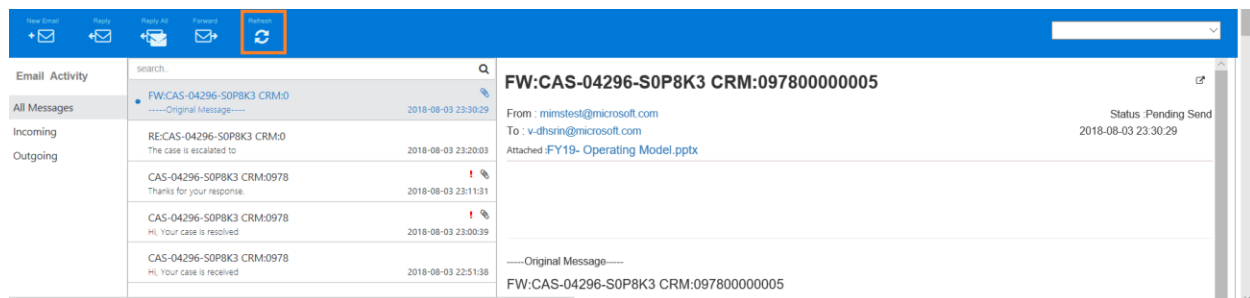
- a. To and CC are populated from the original email.
- b. Subject line is appended with RE: as prefix after post action.



7. Click on the **Forward** button to forward any email. We can add new attachments and remove the existing attachments in the forward Email if needed.



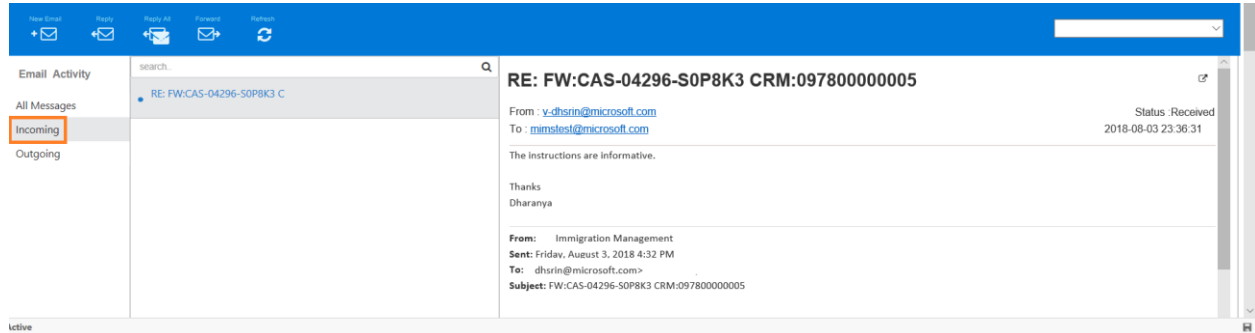
8. Click on the **Refresh** button to load or pull all the latest Emails till date. It refreshes the email activity and reloads with the latest emails.



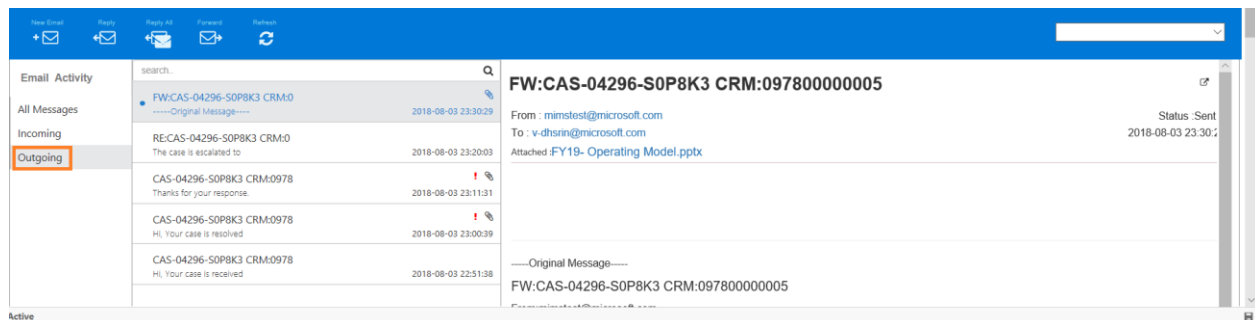
## Email Views and Filters

### Views

1. Click on the **Incoming** tab on the left panel to filter and view only the incoming Emails.

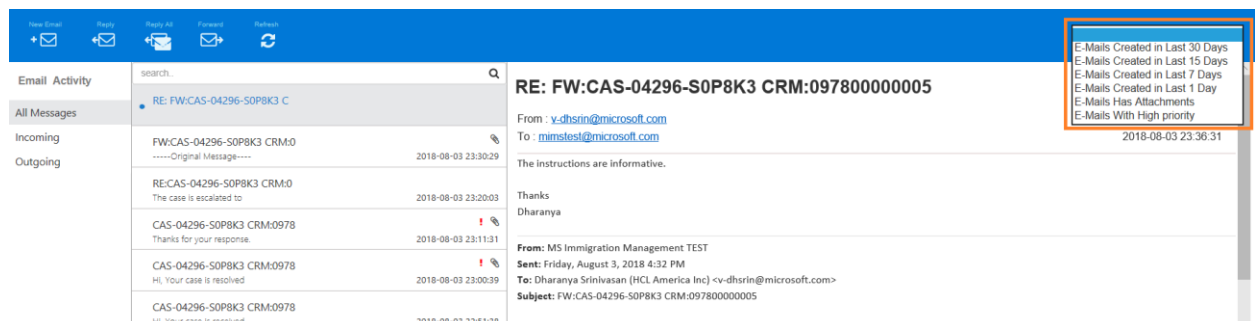


2. Click on the **Outgoing** tab on the left panel to view only the outgoing Emails.

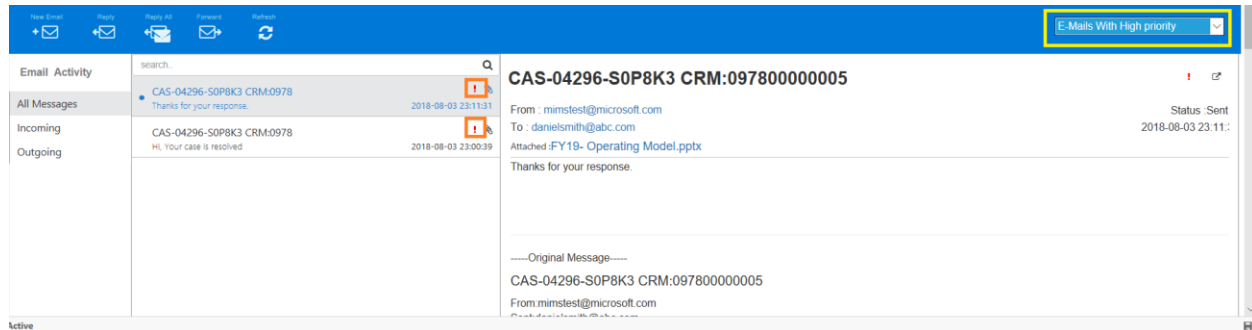


### Filters

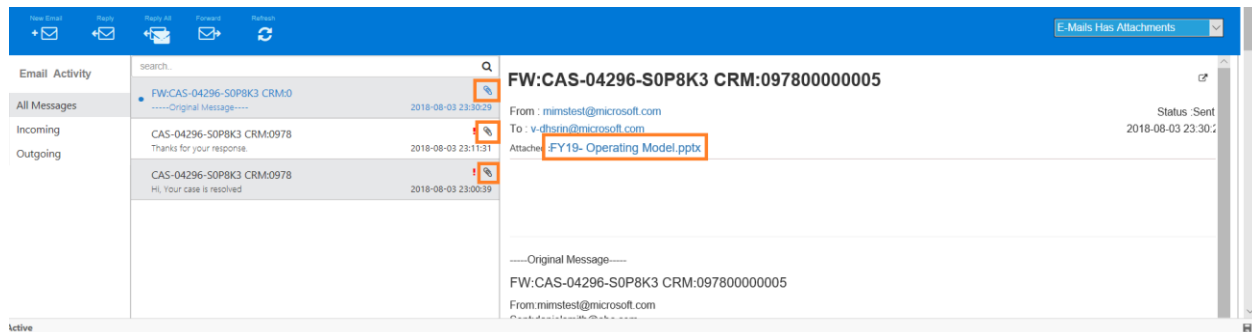
1. For filtering emails, we have an option on the top right corner of the ribbon header. The **filter** option provides, filtering based on **timeline**, **priorities** and added **attachments**.



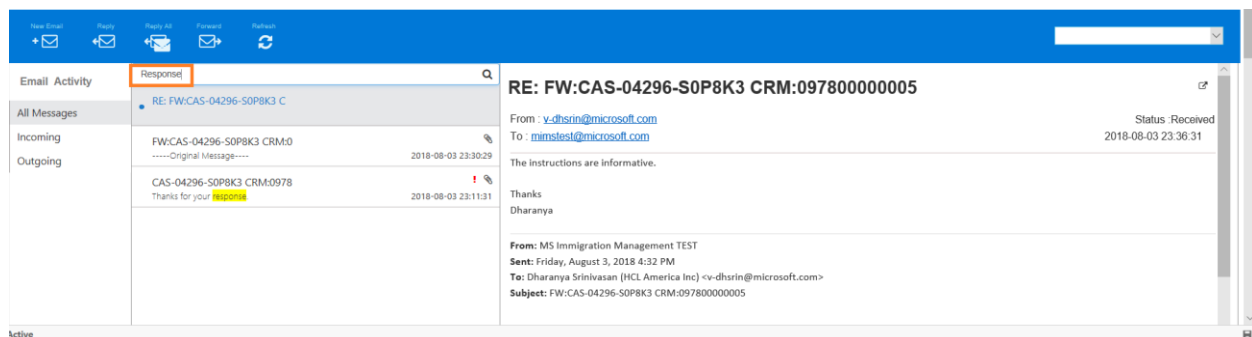
2. If we select the filtering option, '**E-Mails with High Priority**', then it pulls all the Email with high priority and display them. You can also see the emails marked as high priority are tagged with a '!'.



3. Select the option, '**Emails created in the last 7 days**', to filter all the Emails which are created in the last 7 days. Likewise, other selections filter emails in a similar fashion.
4. Select the option, '**Email has Attachments**', then it filters all the Emails which have attachments.



5. We have a **search** bar below the ribbon header and we should enter the keyword to filter and view the emails with that text.



End of Document.