



User Guide

Quick Email

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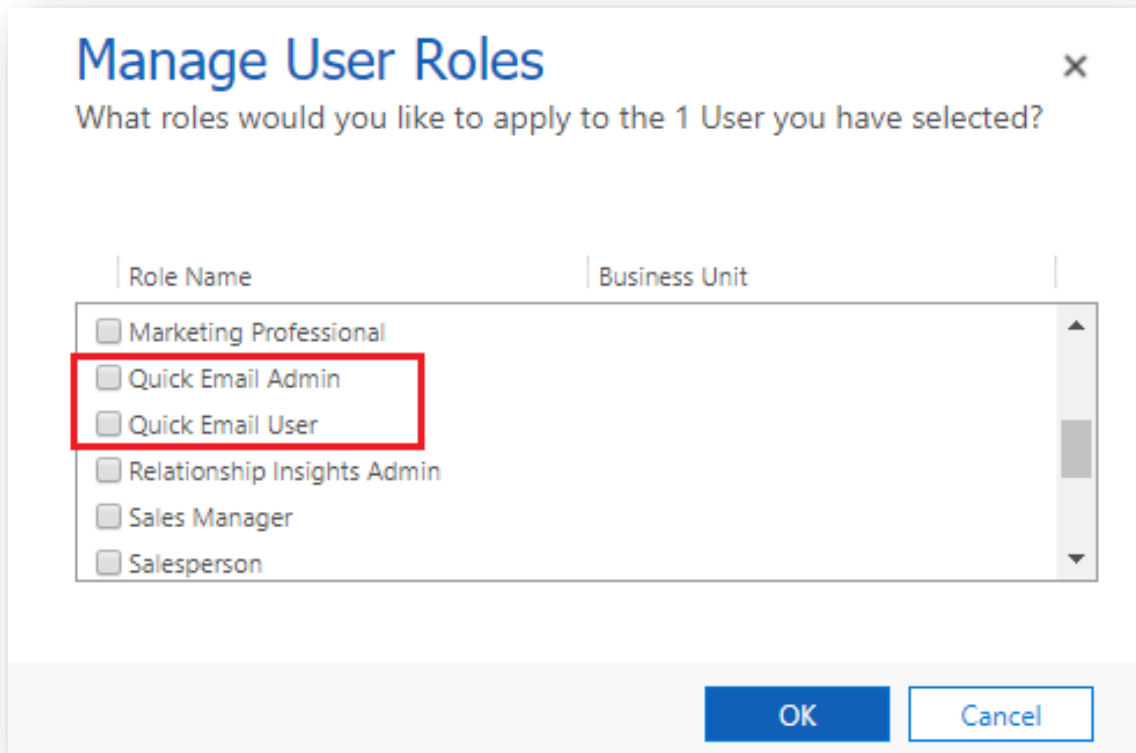
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1 Security Roles

Once Quick Email is successfully installed on the Dynamics 365 environment, System Administrator should assign security roles to every user who will be viewing or using Quick Email.



There are two different types of security roles:

1.1 Quick Email Admin

This security role will assign users full rights to configure Quick Email.

Note: To show Quick Email on the entity form, user need a 'System Administrator' or 'System Customizer' role.

1.2 Quick Email User

This security role needs to be assigned to the user who will be using the Quick Email.

User Types	Quick Email User	Quick Email Admin
Admin		✓
User / Support	✓	

Note: Additional security roles are required to access basic functionality in D365. Kindly contact your System administrator for more help.

2 Configuring Quick Email

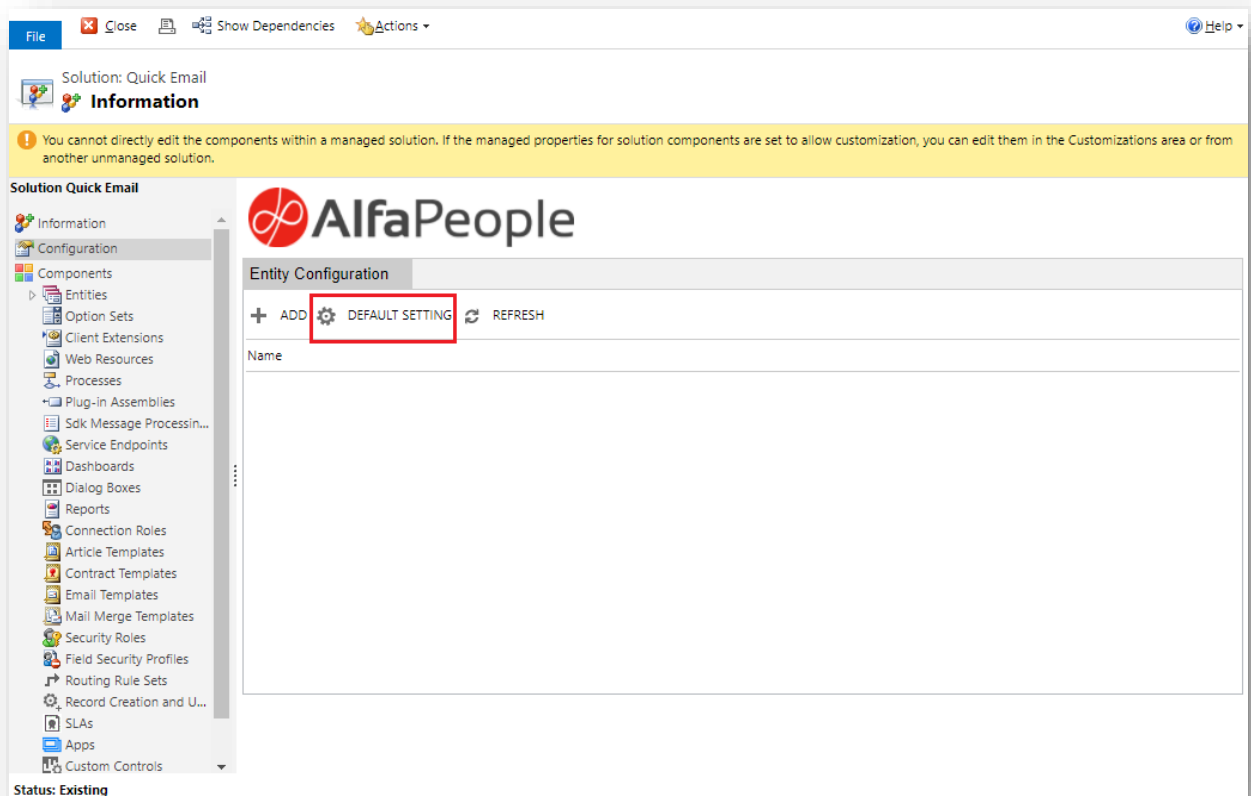
The user should have Quick Email Admin role to configure setup. This will allow the user to configure from/to/cc/subject fields to set a default value.

2.1 Default Configuration

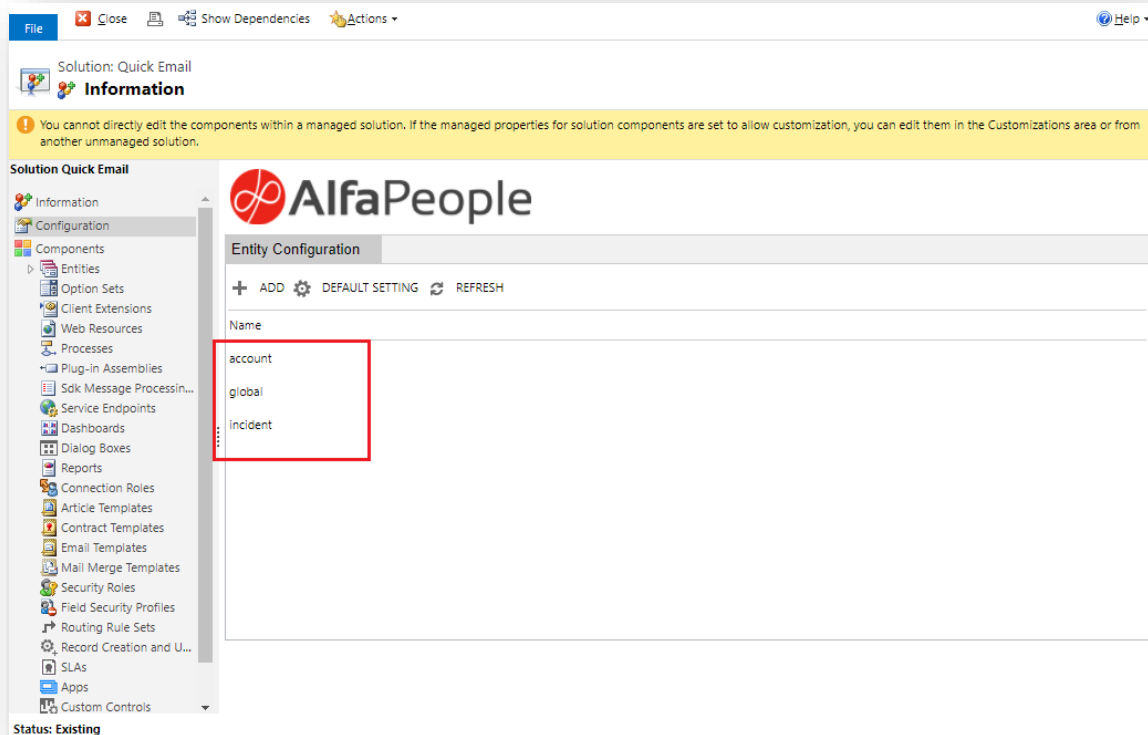
The First step is to load default setting for Quick email. This will create a default configuration for account/incident/global.

Note: 'global' entity configuration will applicable to all entities in D365. To configure setting for specific entity, create a new entity configuration record or update existing one.

Click on Default Setting button to create a default configuration for 'Quick Email'.



Default configuration records will be created for 'Quick Email'. The User can create a new configuration for a specific entity by clicking on '+ Add' button.



2.2 Field Configuration

Field configuration will allow a user to set default values for email fields to speed up the time.

Field	Value
Email	Latest Email by date field (Example : createdon)
From/To/Cc	Field/GUID/Current User
Subject	Field/Text/Separator (User can specify multiple fields by Order number)

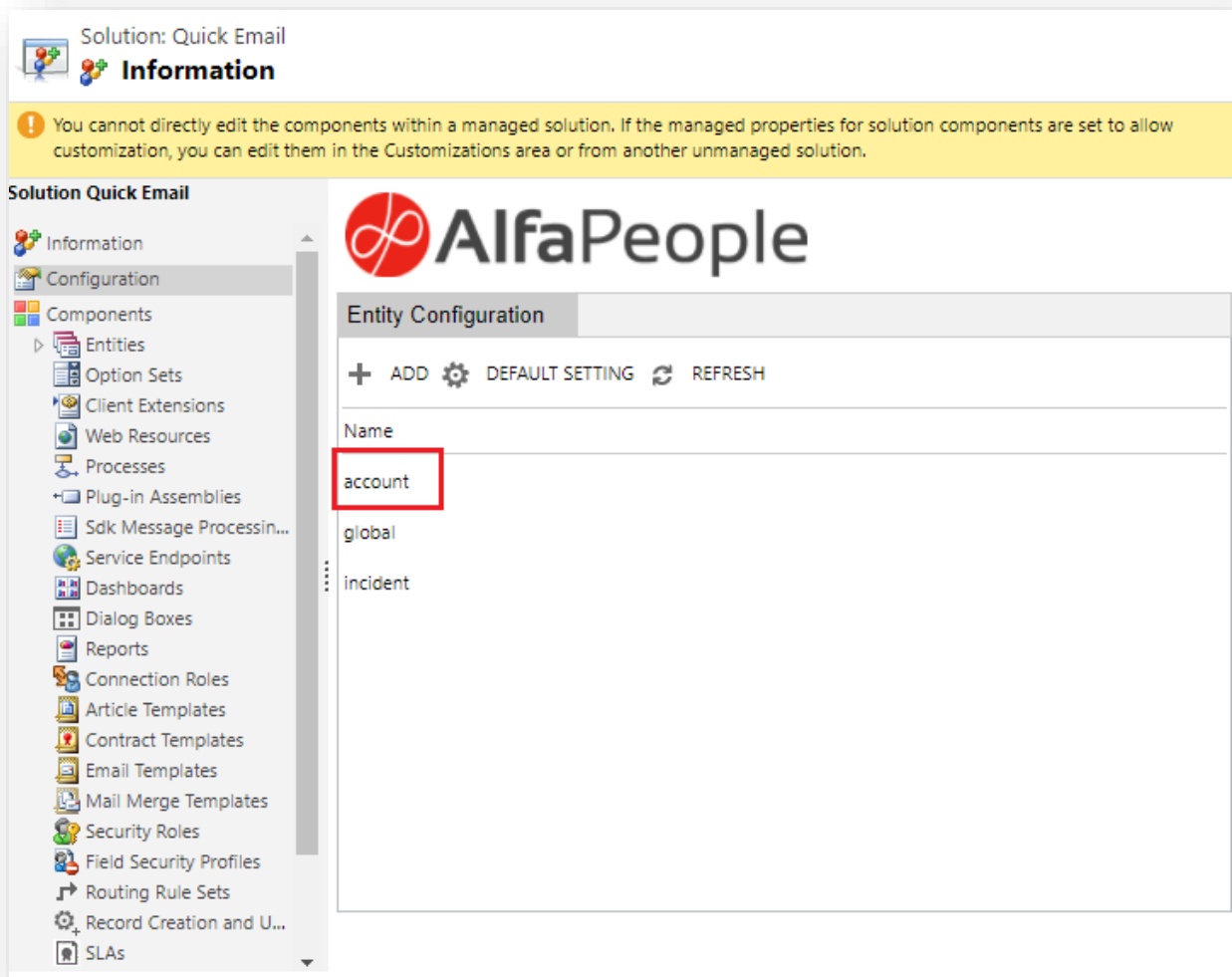
Note: Field value must be logical name of the attribute.

Consideration for Field configuration with an example.

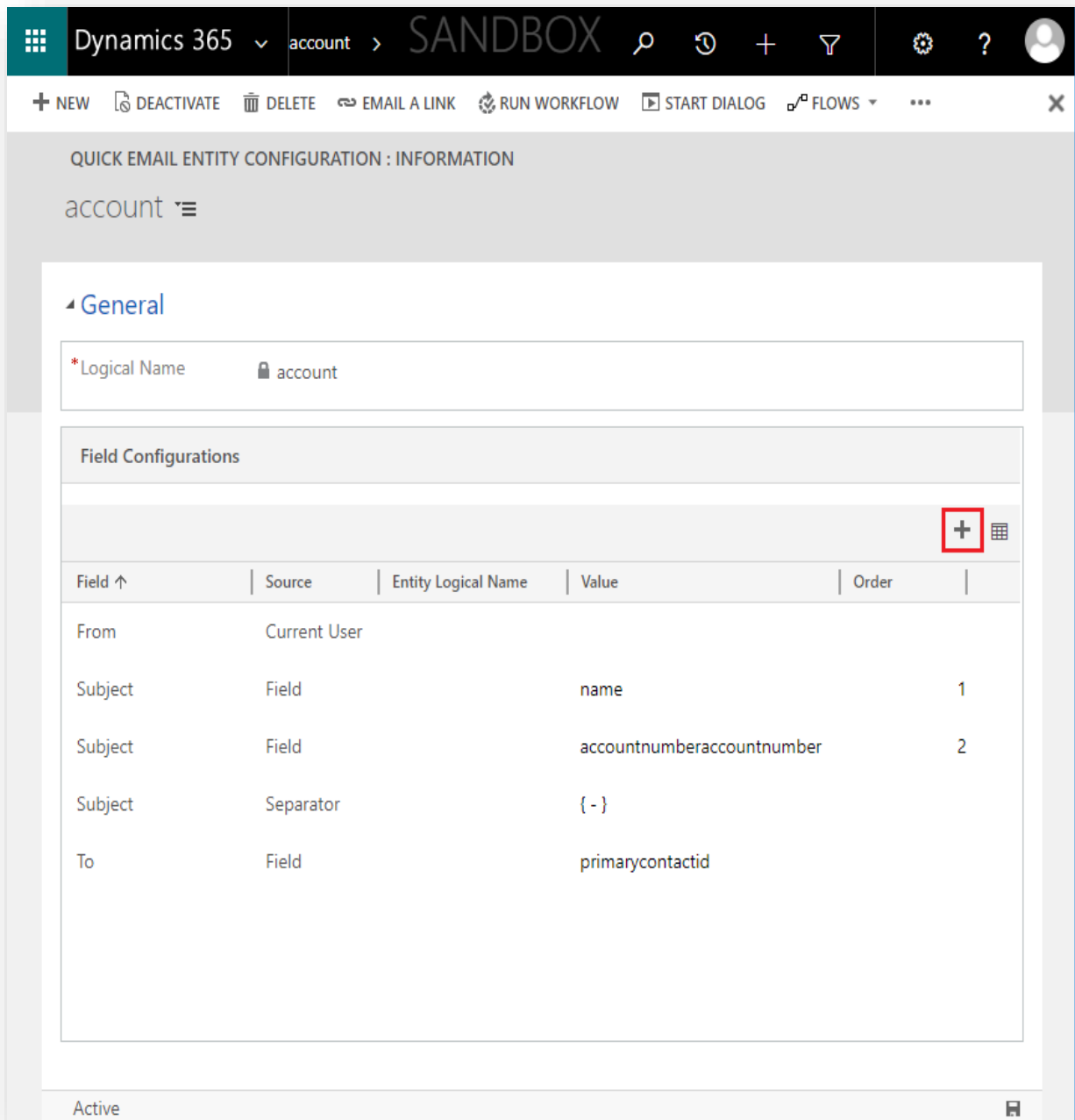
Field	Source	Entity Logical Name	Value	Order by	Purpose/Reason
From	Current User	N/A	N/A	N/A	Always send email from logged in user.
To	Field	N/A	primarycontact	N/A	Set default to primary contact.
Cc	Guid	systemuser	139e5998-e055-4e19-a278-f0f5803aa301	N/A	Cc to support manager.
Subject	Field	N/A	accountnumber	1	Email subject should start with an account number.
Subject	Field	N/A	name	2	Email subject should contain name follow by account number.
Subject	Separator	N/A	{ - }		Separator for email subject fields. Email separator must be enclosed in curly brackets. Example { - }
Subject	Text	N/A	ap		Add company short name suffix at the end of the subject line.
Email	Field	N/A	createdon		Allow a user to select the latest email from the email list.

Below are the steps to configure cc field for account entity.

1. Open Quick Email Solution and double click 'account' entity name.



2. Click '+' sign to create field configuration



QUICK EMAIL ENTITY CONFIGURATION : INFORMATION

account

General

*Logical Name account

Field Configurations

Field ↑	Source	Entity Logical Name	Value	Order
From	Current User			
Subject	Field	name		1
Subject	Field	accountnumberaccountnumber		2
Subject	Separator	{ - }		
To	Field	primarycontactid		

Active

3. Select the required fields

Dynamics 365 > account > SANDBOX

Quick Create: Quick Email Field Configuration

*Field: To, Cc, Subject, Email

*Source: [Red X]

*Entity: account

Save Cancel

Field	Source	Entity Logical Name	Value	Order
Subject	Field	name		1
Subject	Field	accountnumberaccountnumber		2
Subject	Separator	{ - }		
To	Field	primarycontactid		

Active

Dynamics 365 > account > SANDBOX

Quick Create: Quick Email Field Configuration

*Field: Cc

*Source: Field

*Value: ownerid

*Entity: account

Save Cancel

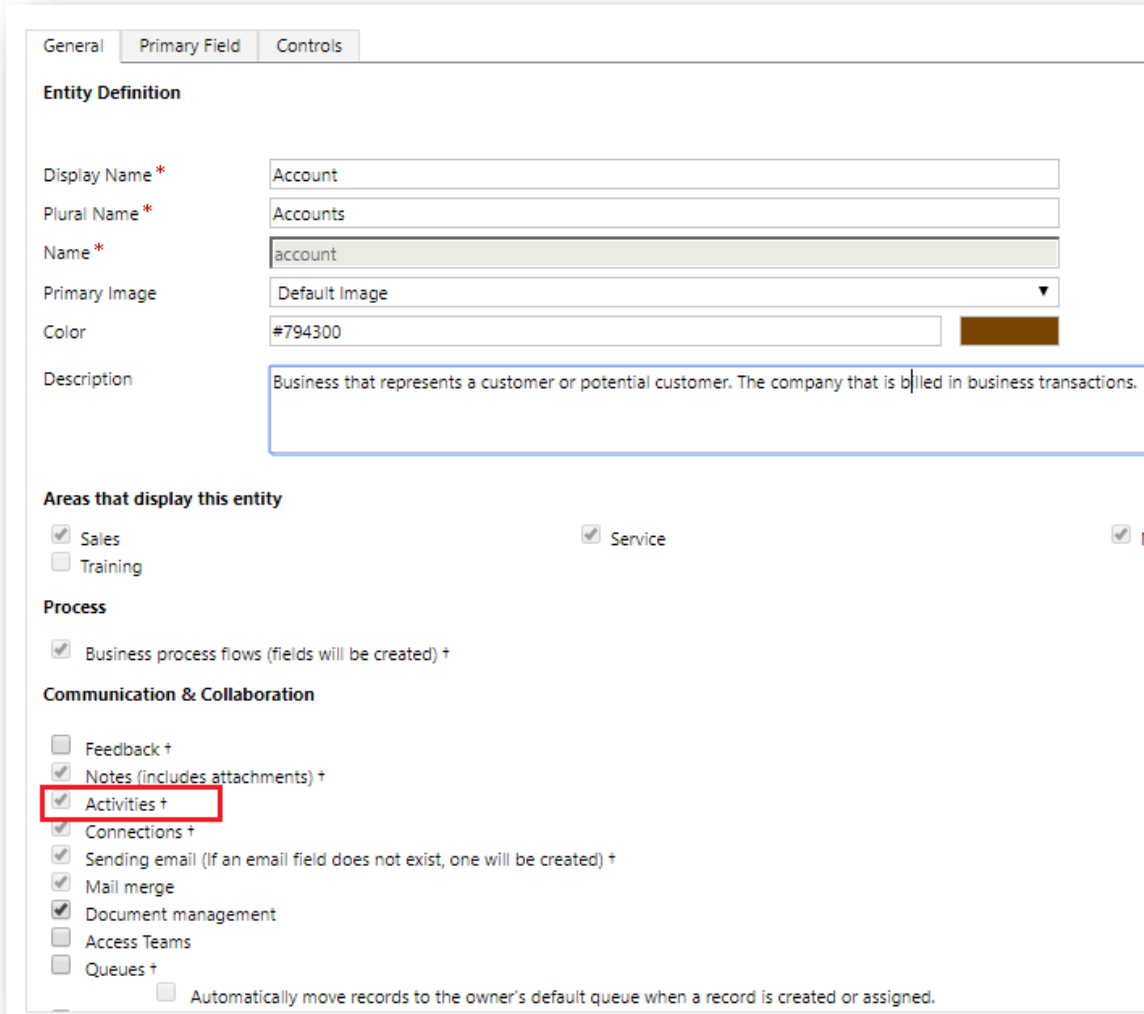
Field	Source	Entity Logical Name	Value	Order
From	Current User			
Subject	Field	name		1
Subject	Field	accountnum...		2
Subject	Separator	{ - }		
To	Field	primarycont...		

Active

2.3 Show Quick Email

Prerequisites

1. A User with 'System Administrator' or 'System Customizer' role.
2. An Entity with 'Activities' option checked.

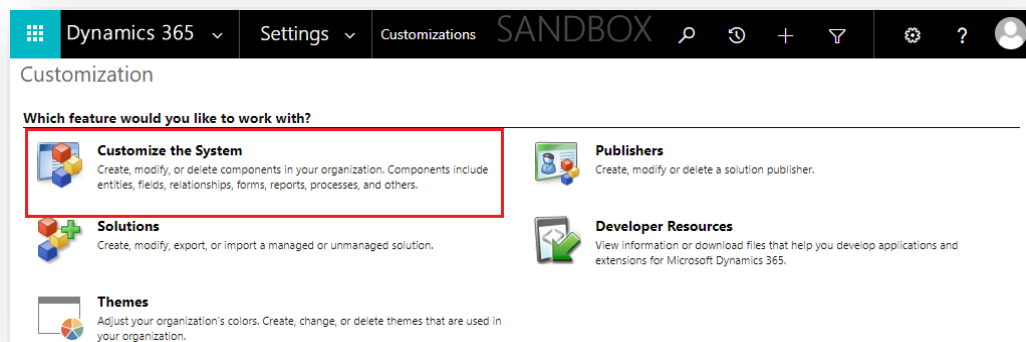
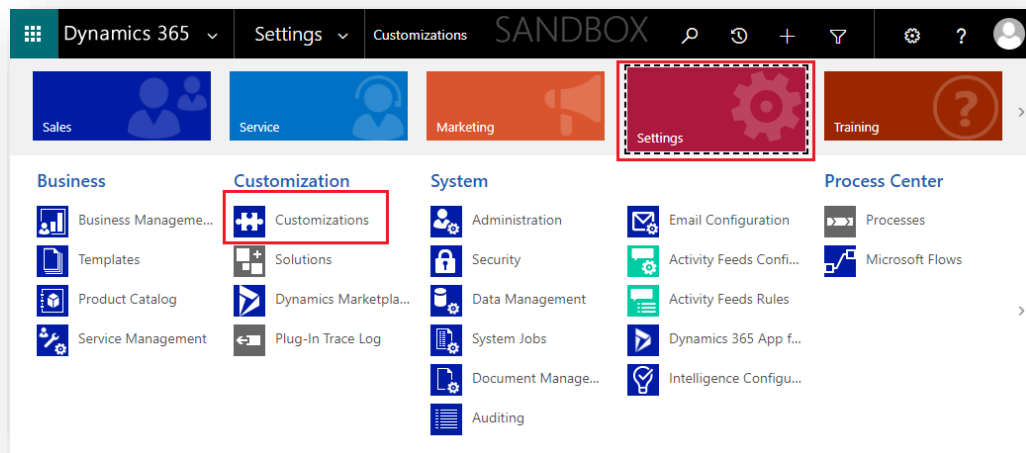


The screenshot shows the 'General' tab of the configuration interface for an entity named 'Account'. The 'Entity Definition' section includes fields for 'Display Name' (Account), 'Plural Name' (Accounts), 'Name' (account), 'Primary Image' (Default Image), 'Color' (#794300), and 'Description' (Business that represents a customer or potential customer. The company that is billed in business transactions.). The 'Areas that display this entity' section has checkboxes for 'Sales', 'Training', 'Service', and 'Marketing'. The 'Process' section has a checkbox for 'Business process flows (fields will be created)'. The 'Communication & Collaboration' section has checkboxes for 'Feedback', 'Notes (includes attachments)', 'Activities' (highlighted with a red box), 'Connections', 'Sending email (If an email field does not exist, one will be created)', 'Mail merge', 'Document management', 'Access Teams', and 'Queues'. There is also an option to 'Automatically move records to the owner's default queue when a record is created or assigned.'.

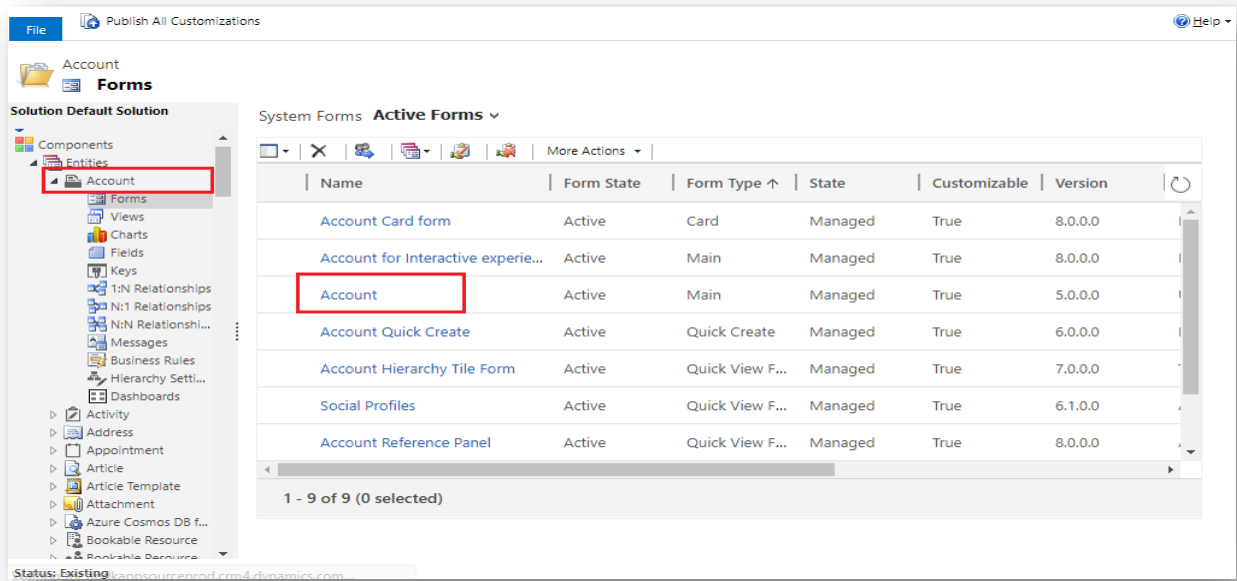
Note : You can add 'Quick Email' to any custom or system entity form.

Follow the below steps to Show Quick Email on Entity Form

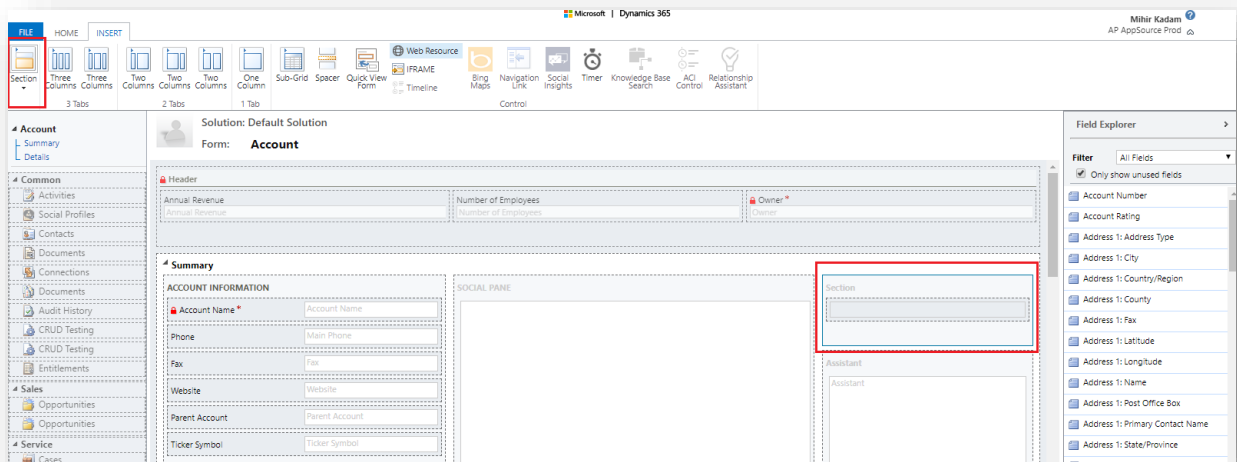
1. Go to settings and customization tab



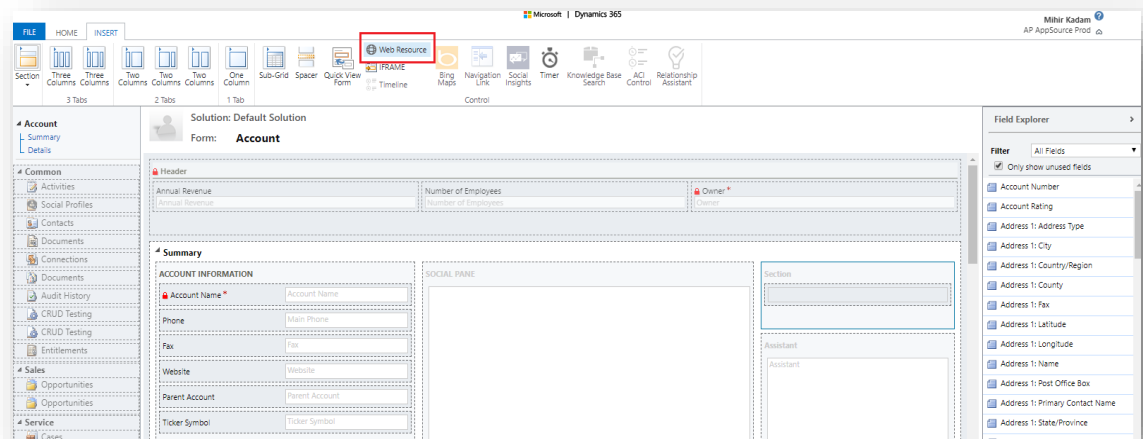
2. Select account entity then click on the main form.



3. Add section on the form



4. Click on 'Web Resource' option



5. Add Web Resource to the form



Web Resource Properties

Modify this Web resource's properties.

General
Formatting
Dependencies

Web resource

Web resource *


ap_/QuickEmailForD365/QuickEmail/index.html


Field Name and Properties

Name *

WebResource_QuickEmail

Label *

QuickEmail

☐ Display label on the Form

Visibility

☒ Visible by default
☐ Enable for mobile

Web Resource Properties

Custom Parameter(data)

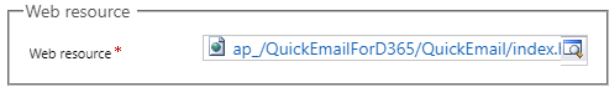
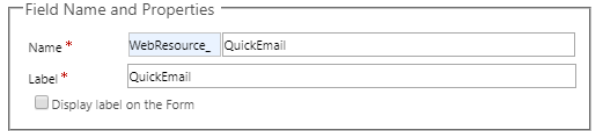
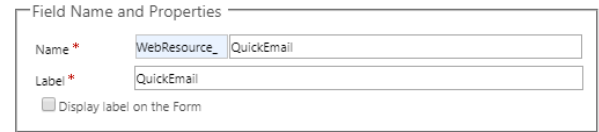
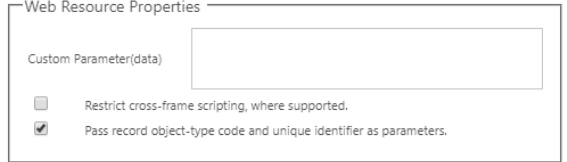

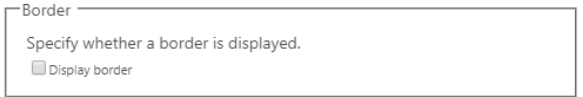
☐ Restrict cross-frame scripting, where supported.
☒ Pass record object-type code and unique identifier as parameters.

OK

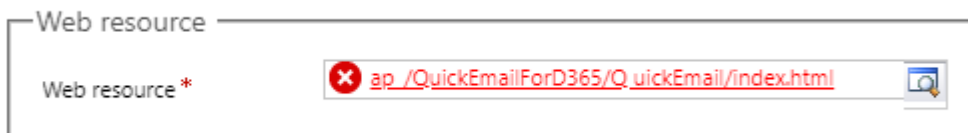
Cancel

Note: Enter a webresource URL as `ap_/QuickEmailForD365/QuickEmail/index.html`

Kindly refer below table to set values in WebResources.

Tab	Name	Value	Screen Capture
General	Web resource	Copy the web resource URL from the Note section.	
	Name	QuickEmail	
	Label	QuickEmail	
	pass record object	Checked	
Formatting	Number of Rows	20	
	Display Border	Unchecked	

If



Note: Adjust the tab width in percentage according to the requirement. Save and publish the form to reflect the customization changes

Microsoft | Dynamics 365

Mihir Kadam
AP AppSource Prod

FILE HOME INSERT

Save Save As Save and Close Publish Save

Change Properties Remove Undo Redo

Header Footer Navigation Select

Business Rules Form Properties Preview Form

Enable Security Roles Show Dependencies Managed Properties Merge Forms Upgrade

Solution: Default Solution
Form: Account

Header

Annual Revenue Annual Revenue Number of Employees Number of Employees Owner* Owner

Field Explorer

Filter All Fields

Only show unused fields

Account Number

Account Rating

Address 1: Address Type

Address 1: City

Address 1: Country/Region

Address 1: County

Address 1: Fax

Address 1: Latitude

Address 1: Longitude

Address 1: Name

Address 1: Post Office Box

Address 1: Primary Contact Name

Address 1: State/Province

Address 1: Street 1

Address 1: Street 2

Address 1: Street 3

Address 1: Telephone 2

Address 1: Telephone 3

Address 1: UPS Zone

Address 1: UTC Offset

New Field

Summary

ACCOUNT INFORMATION

Account Name Account Name

Phone Main Phone

Fax Fax

Website Website

Parent Account Parent Account

Ticker Symbol Ticker Symbol

ADDRESS

Address 1

Map View

SOCIAL PANE

Section

ap_QuickEmailForD365/QuickEmail/index.html

Quick email on Account Form.

Dynamics 365 Sales Accounts Contoso

SANDBOX

NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE FORM PROCESS

ACCOUNT Contoso

Annual Revenue Number of Employees Owner John Hanson

Summary

ACCOUNT INFORMATION

Account Name Contoso

Phone

Fax

Website

Parent Account ABC TV

Ticker Symbol

ADDRESS

Address 1

POSTS ACTIVITIES NOTES

Enter post here

POST

All posts Auto posts User posts

Performance issue
Case: Created by John Hanson for Account Contoso.
On Performance issue's wall
Yesterday 12:50:08

Contoso
Account: Created By Mihir Kadam.
On Contoso's wall
14/03/2018 17:44:24

SEND SAVE INSERT TEMPLATE RESET CLEAR ALL

Email

From John Hanson

To

CC

Subject Contoso

Reply All

User

Account

Account

B I U Calibri 11

Thanks & Regards,

John Hanson,
Support Engineer

www.alfapeople.com

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3 How to Use

Find the Quick Email editor by opening entity form. Please refer below consideration while using Quick Email.

The table consists of filter condition/sorting option/display columns and searching option for the email fields.

Fields	Description	Entity Supported	Filter Criteria	Order By	Lookup data	Search By
Email	Reply, reply all and forward to existing email associated with the current record	Email	1. Activity Status: Completed 2. Regarding: Current record	Created On (Configurable)	1. Subject 2. From 3. Created On/Sent on	1. Subject 2. From
From	Email Sender	1. User 2. Queue	User: 1. Is Disabled: false 2. Primary Email: Contains data Queue 1. Status: Active 2. Email Address: Contains data	Name (Primary Field)	Name	1. Name (Primary Field) 2. Email address
To	Email Recipient	1. Account 2. Contact 3. Entitlement 4. Equipment 5. Knowledge Article 6. Lead 7. Queue 8. User 9. Custom Entity	Status: Active Email Address: Contains Data	Name (Primary Field)	Name	1. Name (Primary Field) 2. Email address
Cc	Email Recipient	1. Account 2. Contact 3. Entitlement 4. Equipment 5. Knowledge Article 6. Lead 7. Queue 8. User 9. Custom Entity	Status: Active Email Address: Contains Data	Name (Primary Field)	Name	1. Name (Primary Field) 2. Email address

3.1. Quick Email for OOB and Custom entity

Quick Email can be configured to work with any entity in D365. Please follow the steps described in [Show Quick Email](#)

3.2. Set Default Value

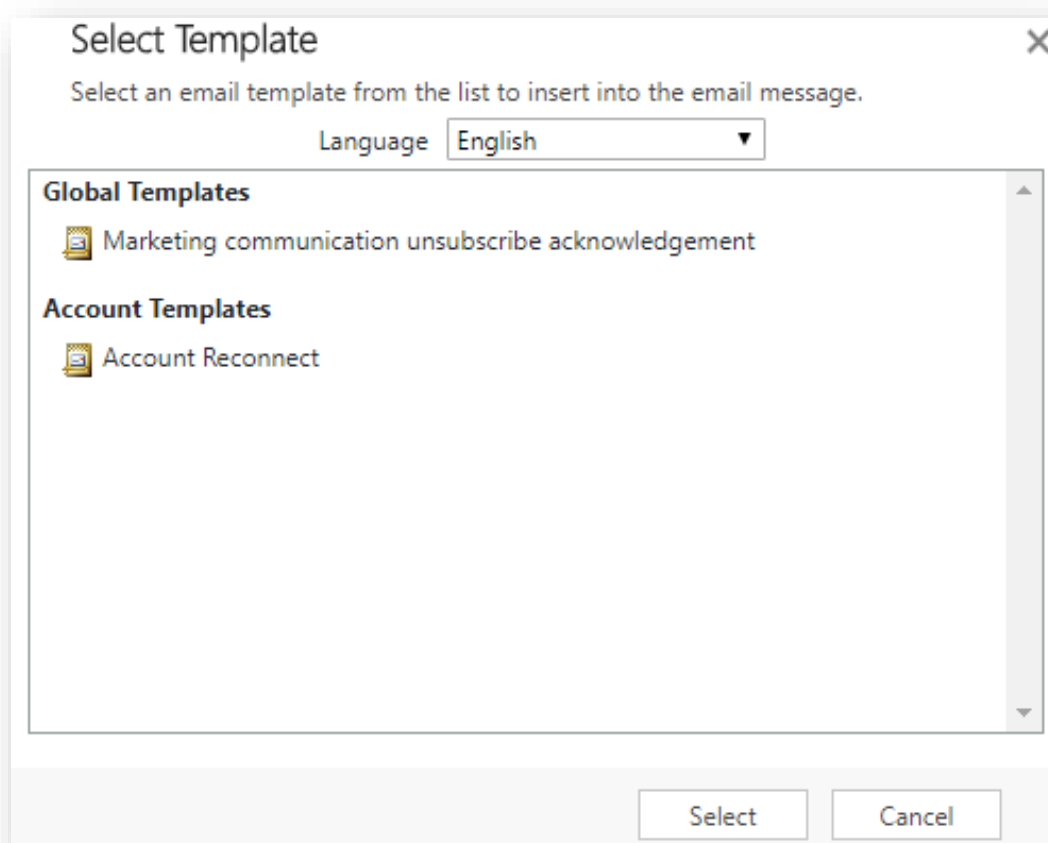
The user can configure default value for From/To/Cc/Subject and email fields to quickly send an email to the customer. Kindly follow the steps provided in [Field Configuration](#) section.

3.3. Email Template

The user can add email template to quick email by clicking on Button 'Insert Template'.

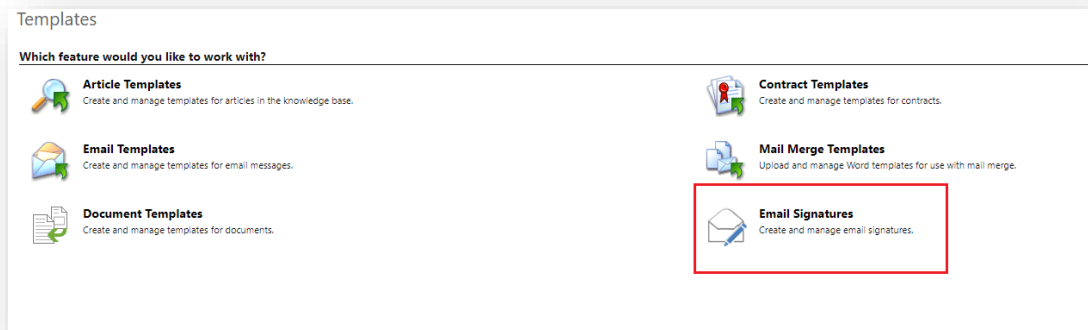


The user can select any 'Global Template' or 'Current Entity' specific template as per requirement.

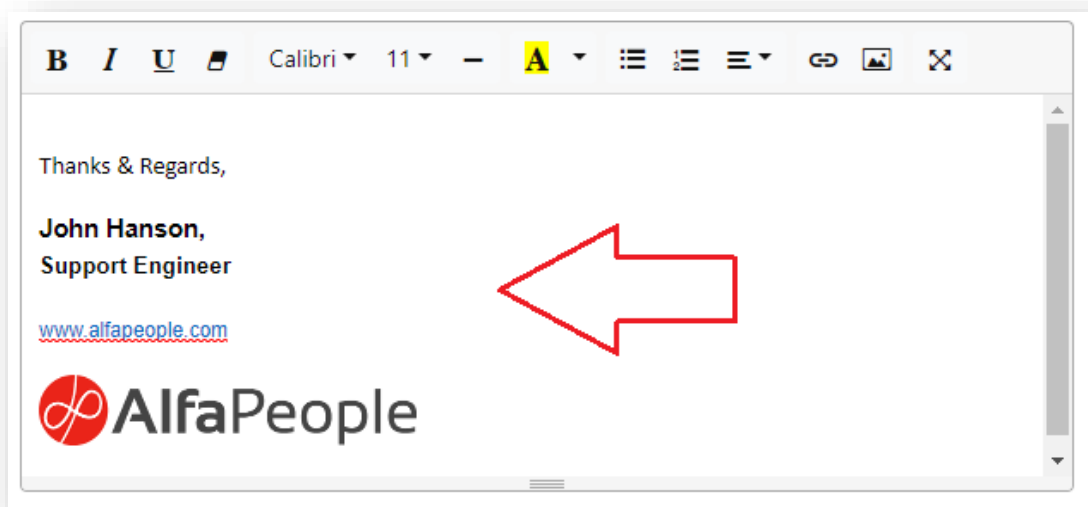
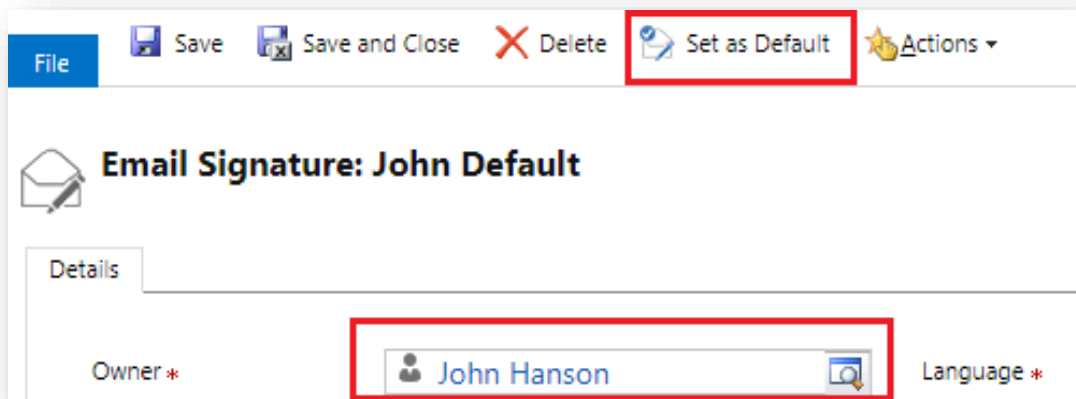


3.4. Default Email Signature

Default email signature will be auto-populated based on 'Current User'. It retrieves the default email signature defined in 'D365 Email Signature' entity.



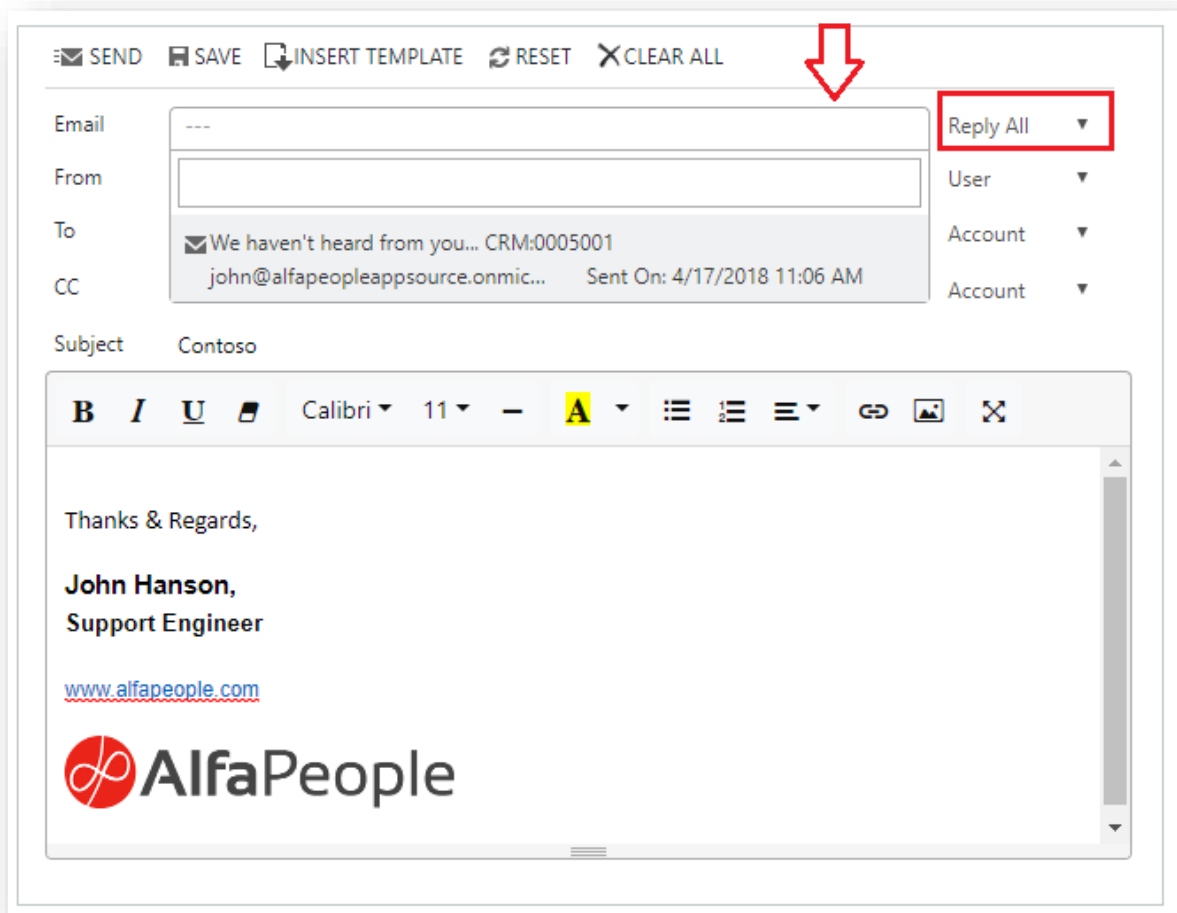
Note: Make sure that 'Set as Default' and 'Owner' properly set in the Email signature.



3.5. Reply/Reply All/Forward

The User can select existing email from the drop-down and perform an appropriate action such as reply all, reply and forward.

Note : Please refer the consideration table provided in [How to Use](#) section for filter condition, columns to display, sorting and searching options.



4. Uninstalling Quick Email

Uninstalling the solution from D365 does not affect Email activities. It will remove all components related to Quick Email.

Note: Kindly remove web resource reference from the entity form.