

User Guide



Document Version: 1.0

Solution Version: 365_072017_3_2



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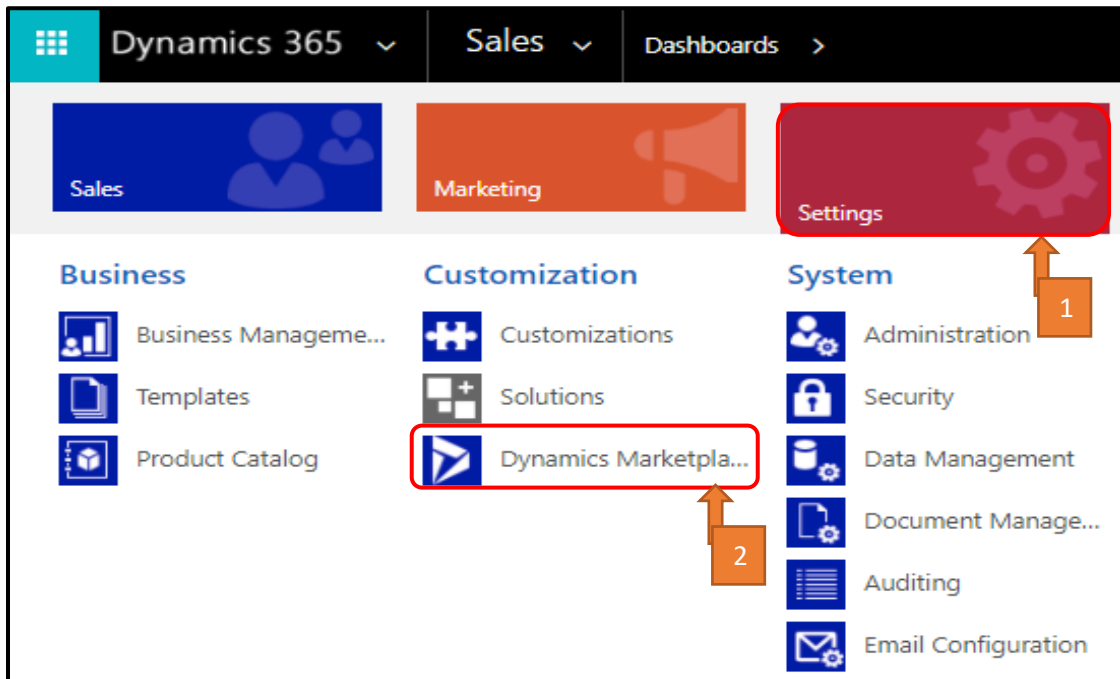
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How to Install Email Signature in your Dynamics 365?

To **Install** MTC's Email Signature Add-on solution into your Dynamics 365, please follow the below instructions.

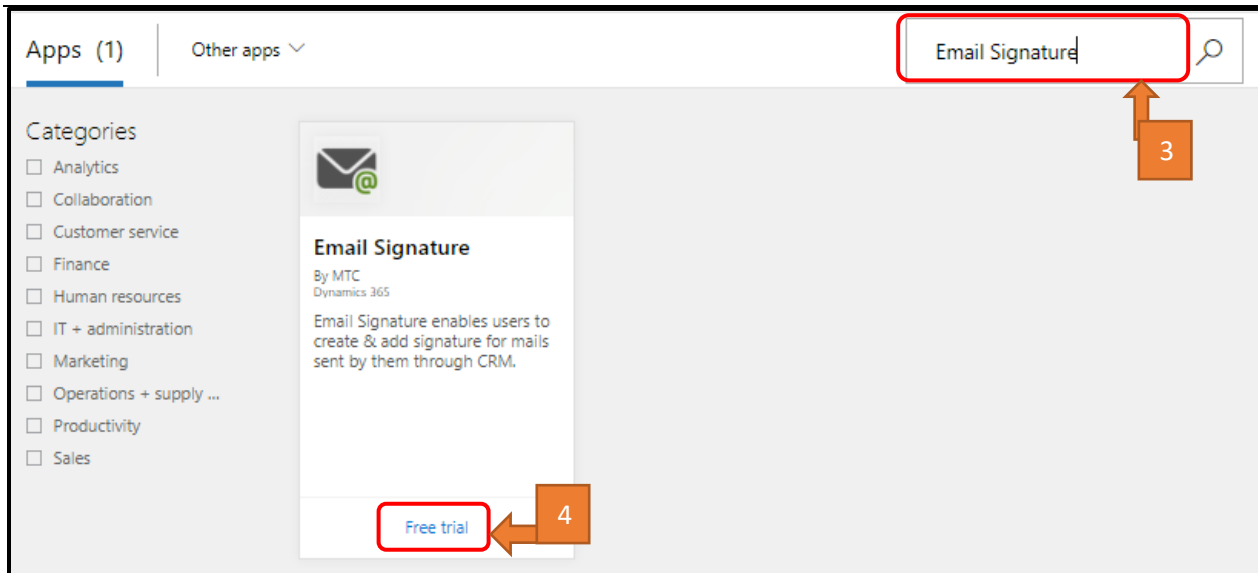
Step1:

- Navigate to **Dynamics 365** → **Settings** and click on **Dynamics Marketplace**.



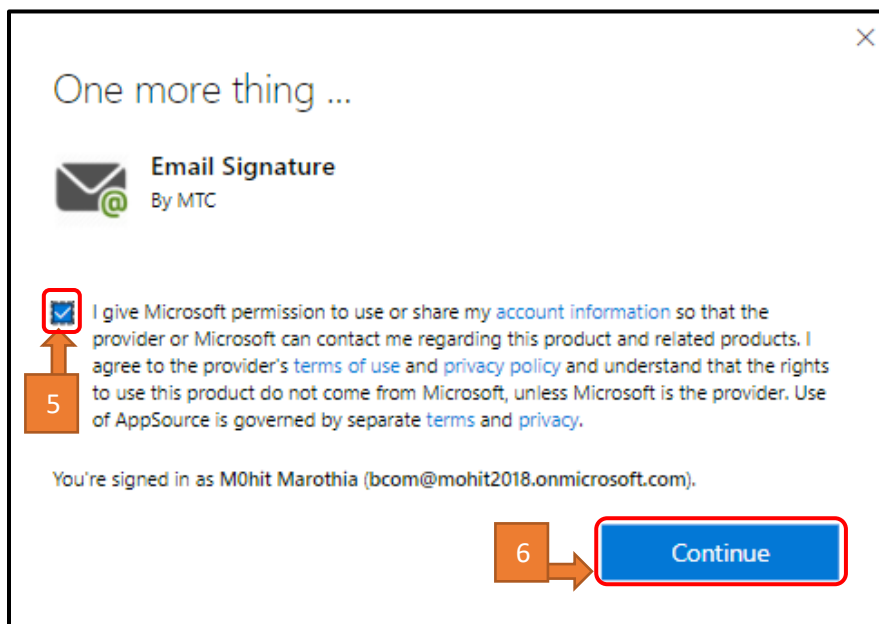
Step2:

- In search box search for **Email Signature by MTC** and click on **free trial**.



Step3:

- Tick the **Check Box** to give permissions and click on **Continue**.



Step4:

- Tick the two check boxes to agree **Microsoft Legal Terms and conditions** and agree to **Privacy Statement and Legal Terms** and click on **Agree** for importing the solution.

Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365

Organization to add the application to: MTC (org727206c2)

☒ Agree to Microsoft's [Legal Terms](#) and [Privacy Statement](#)

☒ Agree to [Privacy Statement](#) and [Legal Terms](#) for importing solutions into Dynamics 365

7

8
Agree
Cancel

- After clicking on agree the **Installation Process Begins**.

Dynamics 365 Portals - Par...	8.3.0.215	1/1/2050	Not installed
Dynamics 365 Sales Applic...	9.0.0.2	1/1/2050	Installed
Email Signature	365.52016.3.1	1/1/2050	Installation pending
Field Service	7.0.0.213	1/1/2050	Not installed
Gamification	2017.5.15	1/1/2050	Not installed
LinkedIn Lead Gen Forms	1.1.19.0	1/1/2020	Not installed

- After completing the installation, you will notice that **licensing solution** also installed along with **Email Signature Solution**.

Step5:

- To get the free trial Click on **licensing solution**.

Dynamics 365 Settings Solutions

Don't Lose Access to Dynamics 365. Convert to a paid subscription [Buy Now](#)

All Solutions

New Delete Import Export Clone a Patch Clone Solution Apply Solution Upgrade Import Translations

Name	Display Name	Version	Installed On	Package ...	Publisher
EmailSignature	Email Signature	365.0820...	10/10/2017	Managed	Management Technology Co...
<input checked="" type="checkbox"/> Licensing	Licensing	1.0.5.5	10/9/2017	Managed	Management Technology Co...
ResourceScheduling...	Field Service Demo ...	1.2.0.1	10/1/2017	Managed	Microsoft Dynamics
ProjectServiceDemo...	Project Service Dem...	1.1.0.0	10/1/2017	Managed	Microsoft Dynamics
SiteMapCustomizati...	Trial Site Map Custo...	9.1	10/1/2017	Managed	Microsoft Dynamics 365

- You will be redirected to Account Registration window.

Step6:

- Please fill up the **Account Information** and click on **submit**. "This will be a onetime activity."

LICENSE INFORMATION

First Name*	Last Name*
<input type="text" value="mohit"/>	<input type="text" value="marothia"/>
Phone*	Company*
<input type="text" value="548445488"/>	<input type="text" value="MTC"/>
Website*	Email*
<input type="text" value="www.mtccrm.com"/>	<input type="text" value="mohit@mtccrm.com"/>
City*	State/Province*
<input type="text" value="Hyderabad"/>	<input type="text" value="tellengana"/>
Country*	Zip/Postal Code*
<input type="text" value="India"/>	<input type="text" value="500050"/>
<input type="button" value="Submit"/>	

- The account registration window refreshes and loads up with MTC products just below the account details.
- You can notice Email Signature Solution status as **Installed**.

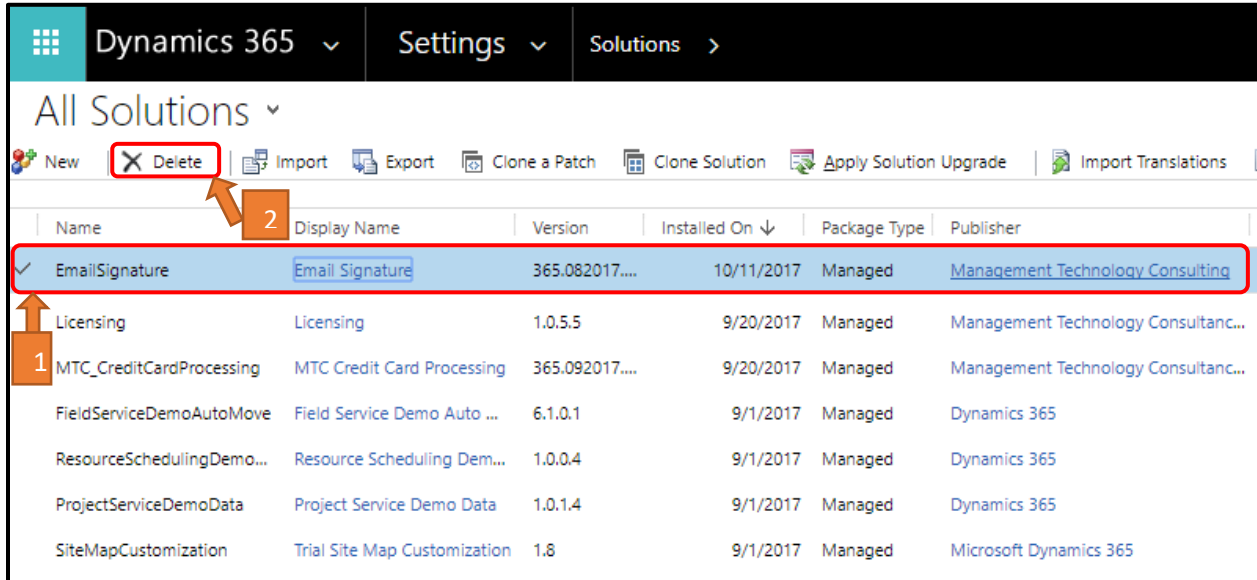
Editable Grid Pro		Get it Now
Email Attachment		Get it Now
Email Signature		Installed
Email Editor		Get it Now
Email To Case		Get it Now
Export DataTool		Get it Now

Note: The free trial license key is generated and activated on the first use of the product.

How to Configure Email Signature in your Dynamics 365?

Step1:

- Navigate to Dynamics 365 → Settings → Solutions.
- Click on Email Signature Solutions.



The screenshot shows the Dynamics 365 interface with the 'Solutions' tab selected. The 'All Solutions' section is active, displaying a table of installed solutions. The 'EmailSignature' solution is highlighted with a red box and a checkmark. An orange arrow labeled '1' points to the 'EmailSignature' row, and another orange arrow labeled '2' points to the 'Delete' button in the top toolbar.

Name	Display Name	Version	Installed On	Package Type	Publisher
✓ EmailSignature	Email Signature	365.082017....	10/11/2017	Managed	Management Technology Consulting
Licensing	Licensing	1.0.5.5	9/20/2017	Managed	Management Technology Consultanc...
MTC_CreditCardProcessing	MTC Credit Card Processing	365.092017....	9/20/2017	Managed	Management Technology Consultanc...
FieldServiceDemoAutoMove	Field Service Demo Auto ...	6.1.0.1	9/1/2017	Managed	Dynamics 365
ResourceSchedulingDemo...	Resource Scheduling Dem...	1.0.0.4	9/1/2017	Managed	Dynamics 365
ProjectServiceDemoData	Project Service Demo Data	1.0.1.4	9/1/2017	Managed	Dynamics 365
SiteMapCustomization	Trial Site Map Customization	1.8	9/1/2017	Managed	Microsoft Dynamics 365

Step2:

- A Configuration window opens up. Select **Signature Settings**.



The screenshot shows a configuration window titled 'Which feature would you like to work with?'. It contains two options: 'Licensing' and 'Signature Settings'. The 'Signature Settings' option is highlighted with a red box and an orange arrow labeled '3' pointing to it.



Licensing
Apply Licensing.



Signature Settings
Place a unique signature and enable the plug in for it.

Step3:

- Type in or Write the Signature Holders Name in between “\$\$.....\$\$” symbol.
- For example we have taken the Signature as “MTC” Hence it will be like “\$\$MTC\$\$”
- If you wish to enable this Signature to your Plugins then click the Tick box against Enable Plug in.
- Click **Save**.

Signature Settings

Place Holder(Signature)

\$\$MTC\$\$

Enable Plug In ☒

4

➔

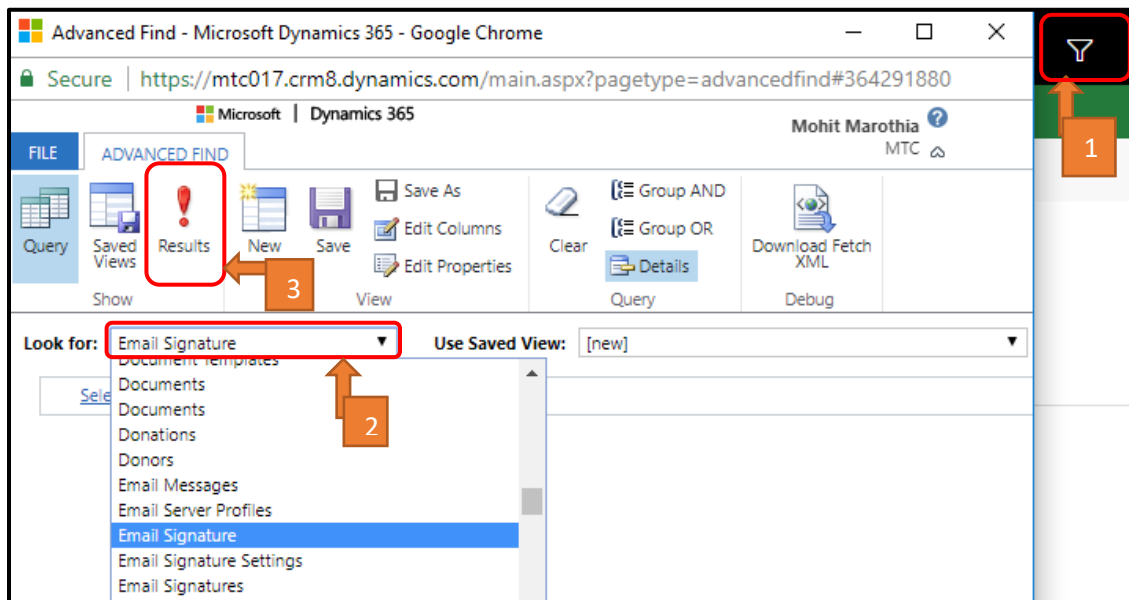
Save

Email Signature Functionality

One Time Settings for Users:

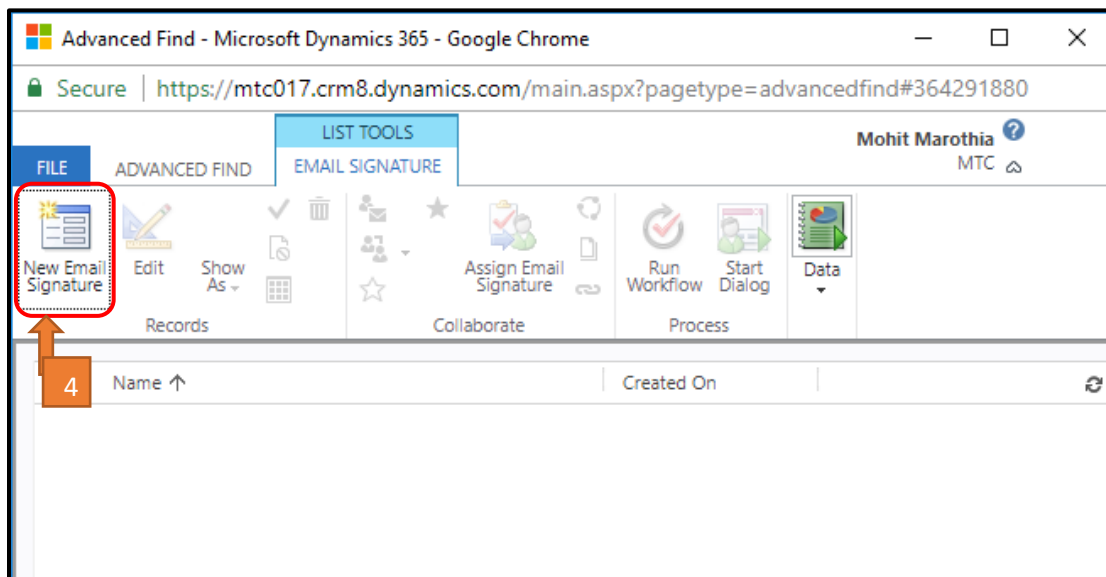
Step1:

- Click **Advance Find** in your Dynamics 365.
- Search for **Email Signature** from the **Look for** option and click on **Results**.



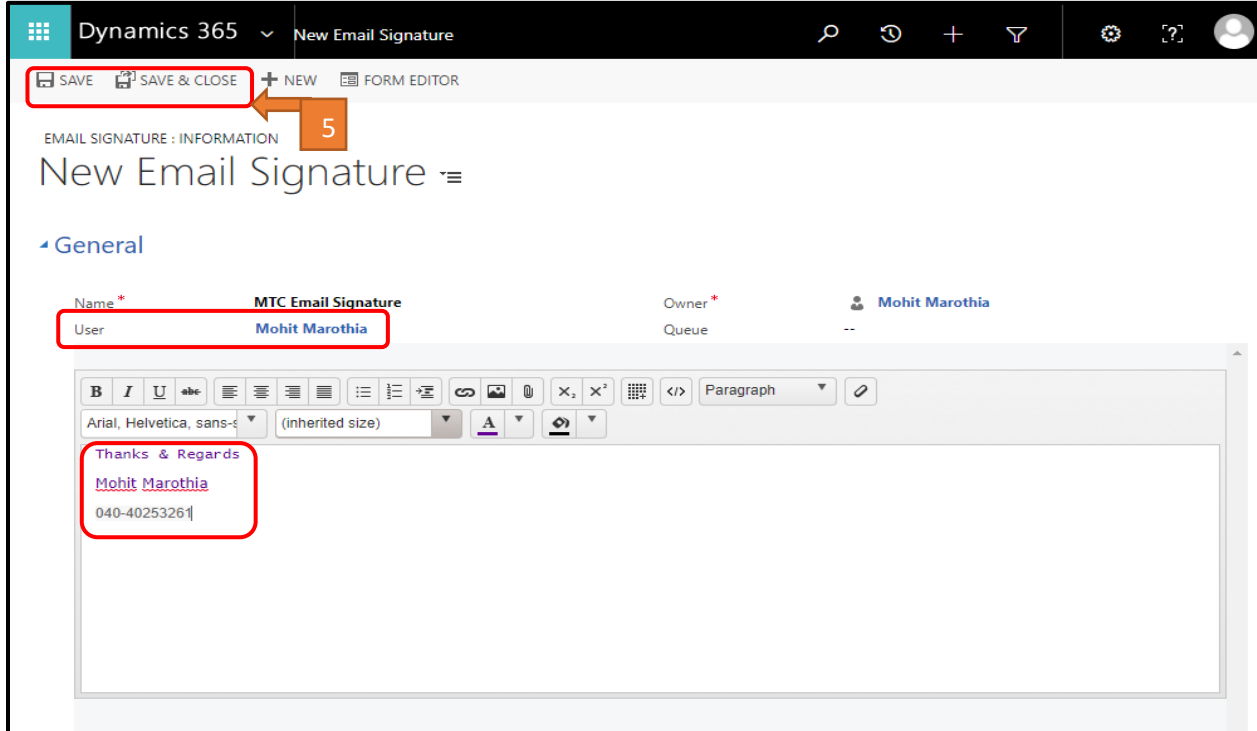
Step2:

- Click on **New Email Signature**.



Step3:

- Fill up the required details such as **Name** and **User**.
- Type in the Signature Message such as shown below.
- You can also Edit, Format, and your own design with the format box.
- Finally click **SAVE** or **SAVE & CLOSE**.



Dynamics 365 | New Email Signature

SAVE SAVE & CLOSE NEW FORM EDITOR

EMAIL SIGNATURE : INFORMATION

New Email Signature

General

Name * MTC Email Signature Owner * Mohit Marothia

User Mohit Marothia Queue --

B I U abc [list icons] [link icon] [image icon] [table icon] [code icon] Paragraph

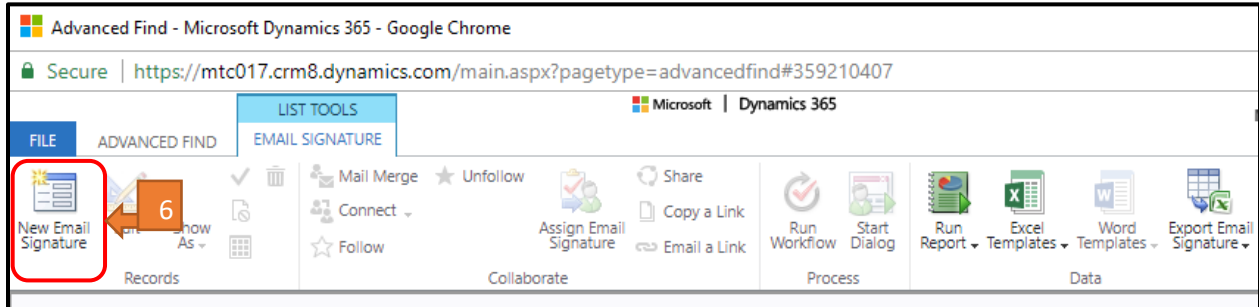
Arial, Helvetica, sans-serif (inherited size) A [background color icon]

Thanks & Regards
Mohit Marothia
040-40253261

One Time Settings for Queue:

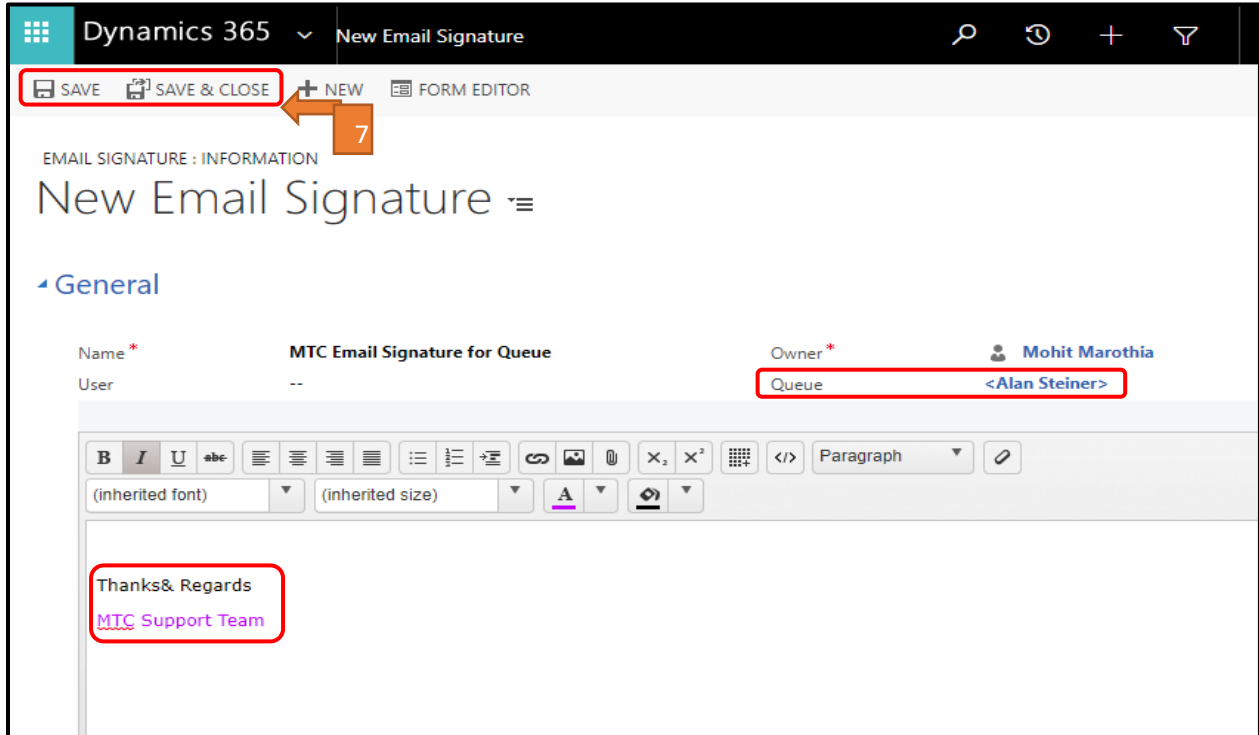
Step4:

- Click **Advance Find** in your Dynamics 365.
- Search for **Email Signature** from the **Look for** option and click on **Results**.
- Click on **New Email Signature**.



Step5:

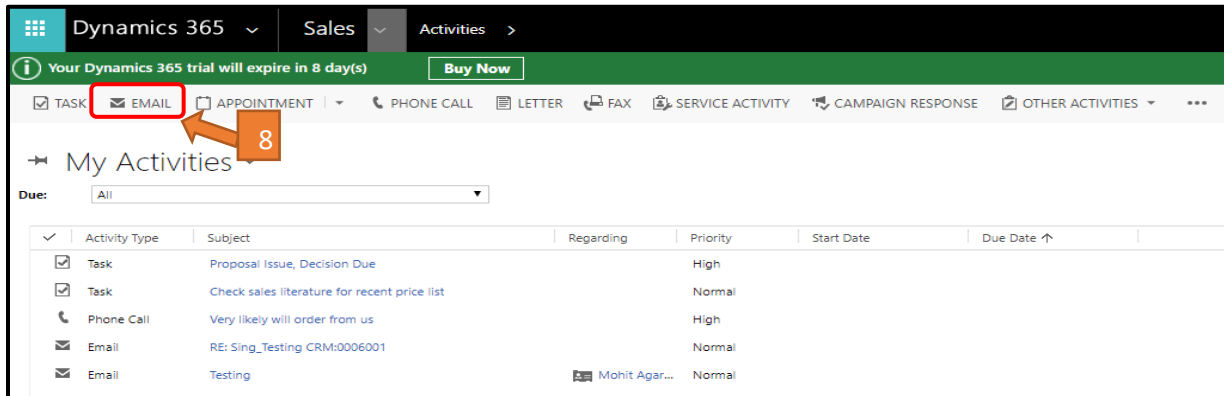
- Fill up the required details such as **Name** and **Queue**.
- Type in the Signature Message such as shown below.
- You can also Edit, Format, and your own design with the format box.
- Finally click **SAVE** or **SAVE & CLOSE**.



Sending Mails from CRM

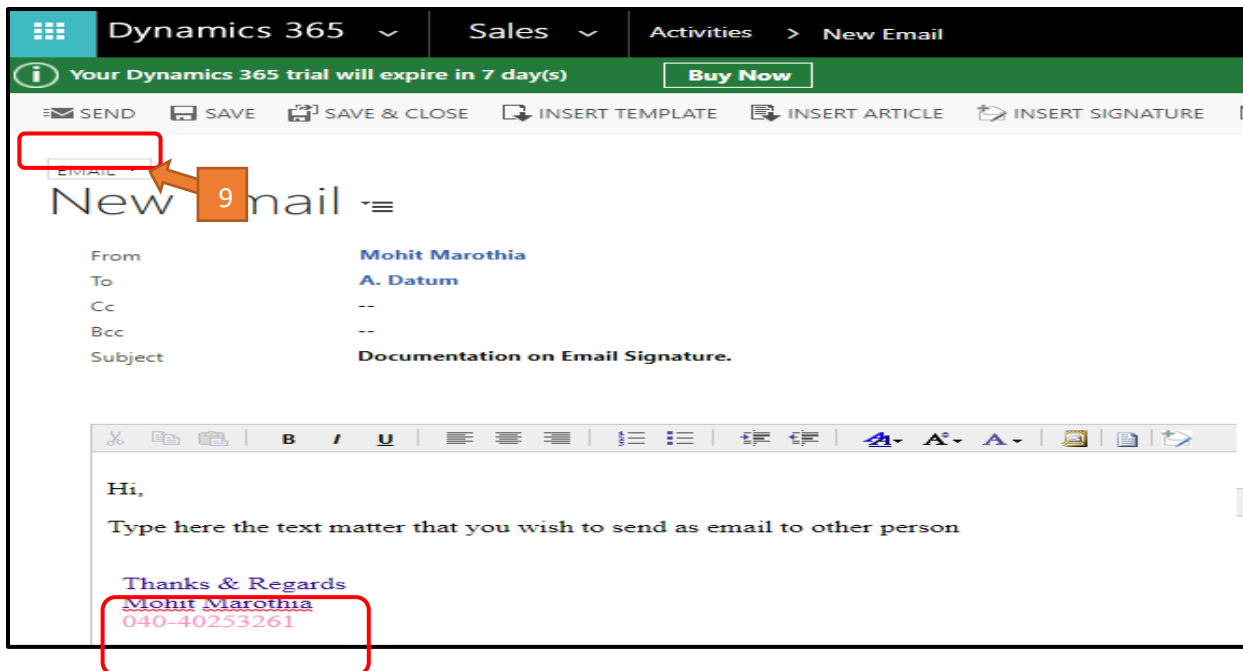
Step6:

- Navigate to Dynamics 365 → Sales → Activities.
- Select **EMAIL** to send an Email to your desired contact.



Step5:

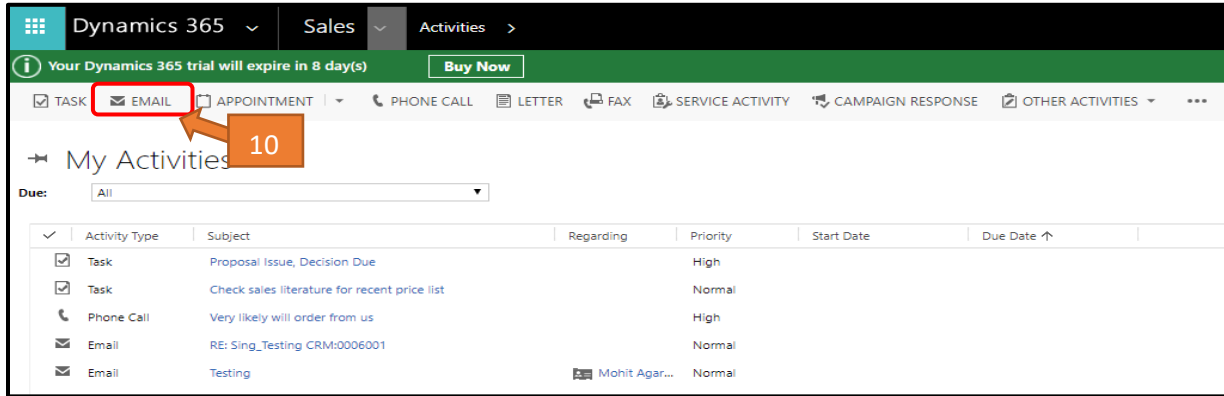
- New Email window screen opens.
- You can Notice the Signature is automatically displayed because of prior settings done.
- Fill up the Mail body content and do not forget to select the **To** field with the help of Look up.
- Click on **SEND** button.



Sending Mail from CRM Queue

Step6:

- Navigate to **Dynamics 365** → **Sales** → **Activities**.
- Select **EMAIL** to send an Email to your desired Queue.



Step7:

- New Email window screen is opened.
- Change the Field "From". Type "<" and press enter to get a drop down list, Select One of the Queue from the List.
- For Example, we have Selected <Alan Steiner>.
- You can Notice the Signature is automatically displayed because of the Prior settings done.

Dynamics 365 | **Sales** | **Activities** > **New Email**

Your Dynamics 365 trial will expire in 7 day(s) [Buy Now](#)

SEND **SAVE** **SAVE & CLOSE** **INSERT TEMPLATE** **INSERT ARTICLE** **INSERT SIGNATURE** **FORM**

EMAIL

New Email

From <Alan Steiner>

To A. Datum

Cc --

Bcc --

Subject Documentation on Email Signature

Hi,

Type here the text matter that you wish to send as email to the other person.

Thanks& Regards
MTC Support Team

➤ In Advance find you can view that both the above mails are sent.

Advanced Find - Microsoft Dynamics 365 - Google Chrome

Secure | <https://mtc017.crm8.dynamics.com/main.aspx?extraqs=%3fDataProvider%3dMicrosoft.Crm.Application.Controls..>

Microsoft | Dynamics 365 Mohit

FILE **ADVANCED FIND** **EMAIL MESSAGES**

LIST TOOLS

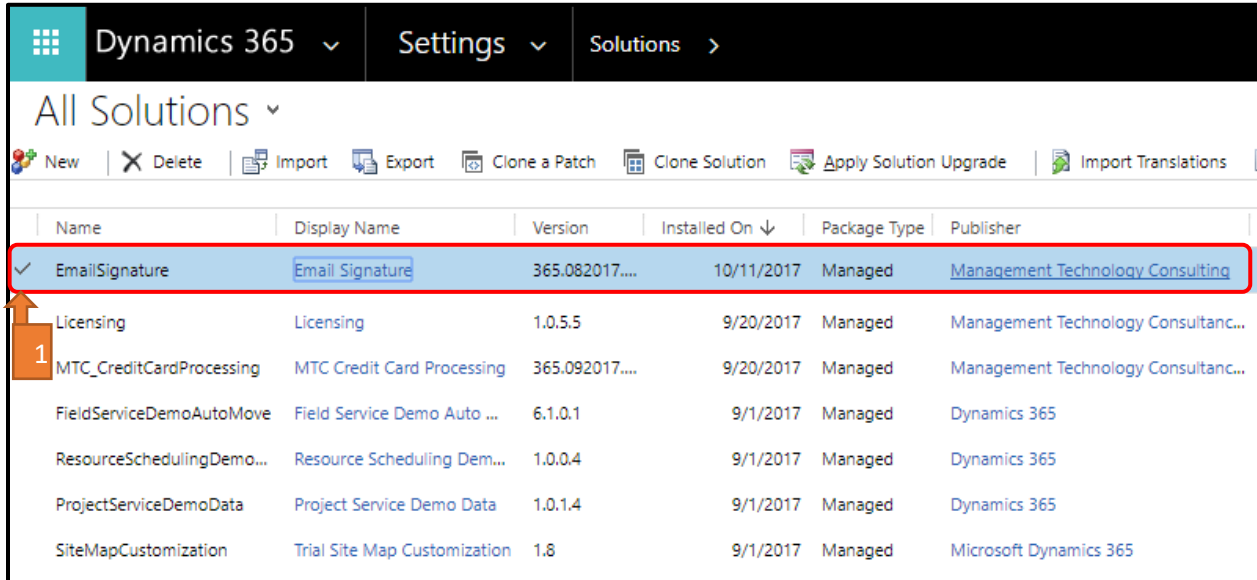
Records **Collaborate** **Process** **Data**

Subject	From	To	Regarding	Priority
Documentation on Email Signture CRM:0006004	<Alan Steiner>	A. Datum		Normal
Documentation on Email Signature. CRM:00060...	Mohit Marothia	A. Datum		Normal

How to Uninstall Email Signature in your Dynamics 365?

Step1:

- Navigate to Dynamics 365 → Settings → Solutions.
- Click on **Email Signature Solution** and click on **Delete**.

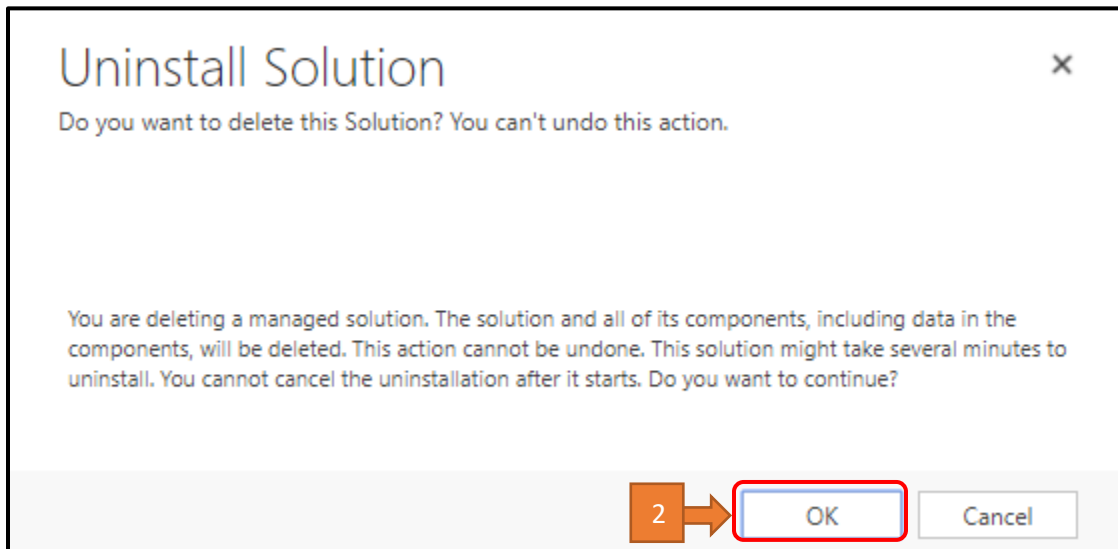


The screenshot shows the 'All Solutions' page in Dynamics 365. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. Below the navigation bar, there are tabs for 'New', 'Delete', 'Import', 'Export', 'Clone a Patch', 'Clone Solution', 'Apply Solution Upgrade', and 'Import Translations'. A table lists the installed solutions. The first row, 'EmailSignature', is highlighted with a blue background and a red border. An orange arrow labeled '1' points to the checkmark in the first column of this row.

Name	Display Name	Version	Installed On	Package Type	Publisher
✓ EmailSignature	Email Signature	365.082017....	10/11/2017	Managed	Management Technology Consulting
Licensing	Licensing	1.0.5.5	9/20/2017	Managed	Management Technology Consultanc...
MTC_CreditCardProcessing	MTC Credit Card Processing	365.092017....	9/20/2017	Managed	Management Technology Consultanc...
FieldServiceDemoAutoMove	Field Service Demo Auto ...	6.1.0.1	9/1/2017	Managed	Dynamics 365
ResourceSchedulingDemo...	Resource Scheduling Dem...	1.0.0.4	9/1/2017	Managed	Dynamics 365
ProjectServiceDemoData	Project Service Demo Data	1.0.1.4	9/1/2017	Managed	Dynamics 365
SiteMapCustomization	Trial Site Map Customization	1.8	9/1/2017	Managed	Microsoft Dynamics 365

Step2:

- Click on **OK** to delete the Email Signature Solution.



The screenshot shows the 'Uninstall Solution' dialog box. The title is 'Uninstall Solution' and the message is 'Do you want to delete this Solution? You can't undo this action.' Below the message, there is a warning: 'You are deleting a managed solution. The solution and all of its components, including data in the components, will be deleted. This action cannot be undone. This solution might take several minutes to uninstall. You cannot cancel the uninstallation after it starts. Do you want to continue?'. At the bottom right, there are two buttons: 'OK' and 'Cancel'. An orange arrow labeled '2' points to the 'OK' button.