EMAIL ALERT

A Microsoft Dynamics 365 CRM solution that provides the count of received unread emails on a Case form.

Contents

Introduction....2
Setup....2
Installation....2
Verifying Solution Installation....6
Follow-On....7
Configuration....7
Edit Case Main Form....7
Troubleshooting....9
Edit Email Main Form....11
Other than System Administrator....14
Email Alert Functionality....15
Scenario....16

Introduction

The *Email Alert* Solution is an add-on feature to Dynamics 365 CRM that counts and manages unread CRM emails received on a Case.

Feature Benefits:

- The Case form dynamically updates the unread Pending Email Count without having to go to the Email section.
- Option to change the status of Emails from Read to Unread, and back again, thus dynamically affecting the Pending Count.

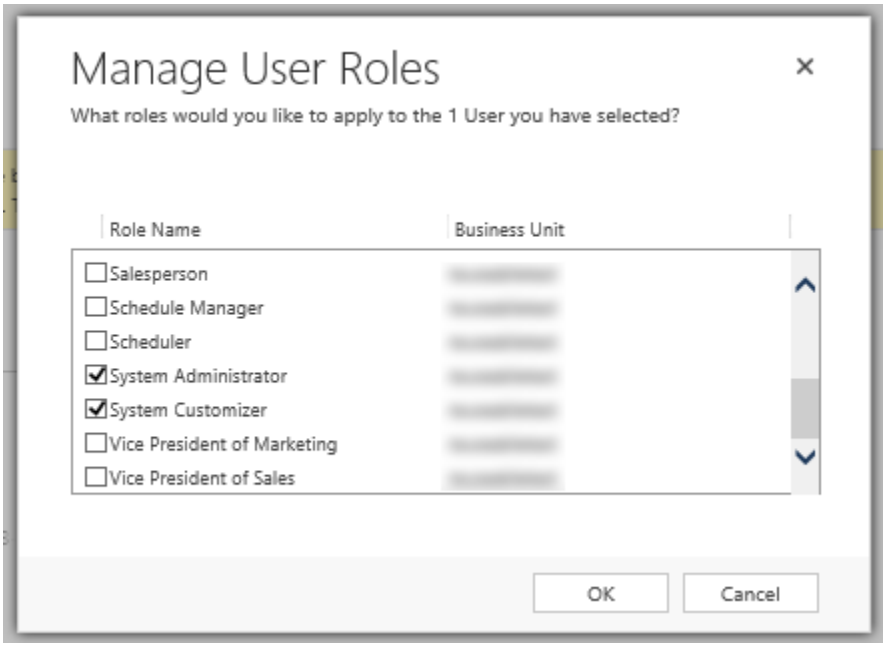
This solution is built on Dynamics 365 and seamlessly works on Dynamics CRM 2016 and above.

Setup

Installation

Install *Email Alert* into Dynamics 365 CRM from AppSource

1. To begin, the User must have the proper roles assigned to complete the Setup, otherwise alerts will appear and block progress. The following roles are required:

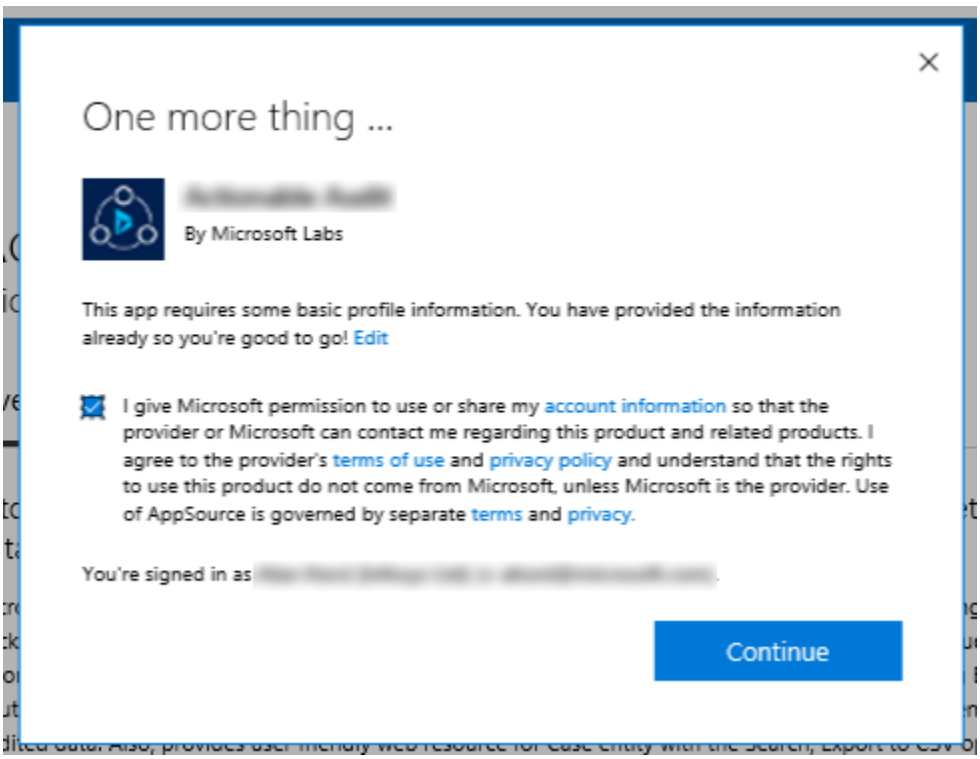


2. Go to AppSource (https://appsource.microsoft.com/) and search for the solution name, "Email Alert".

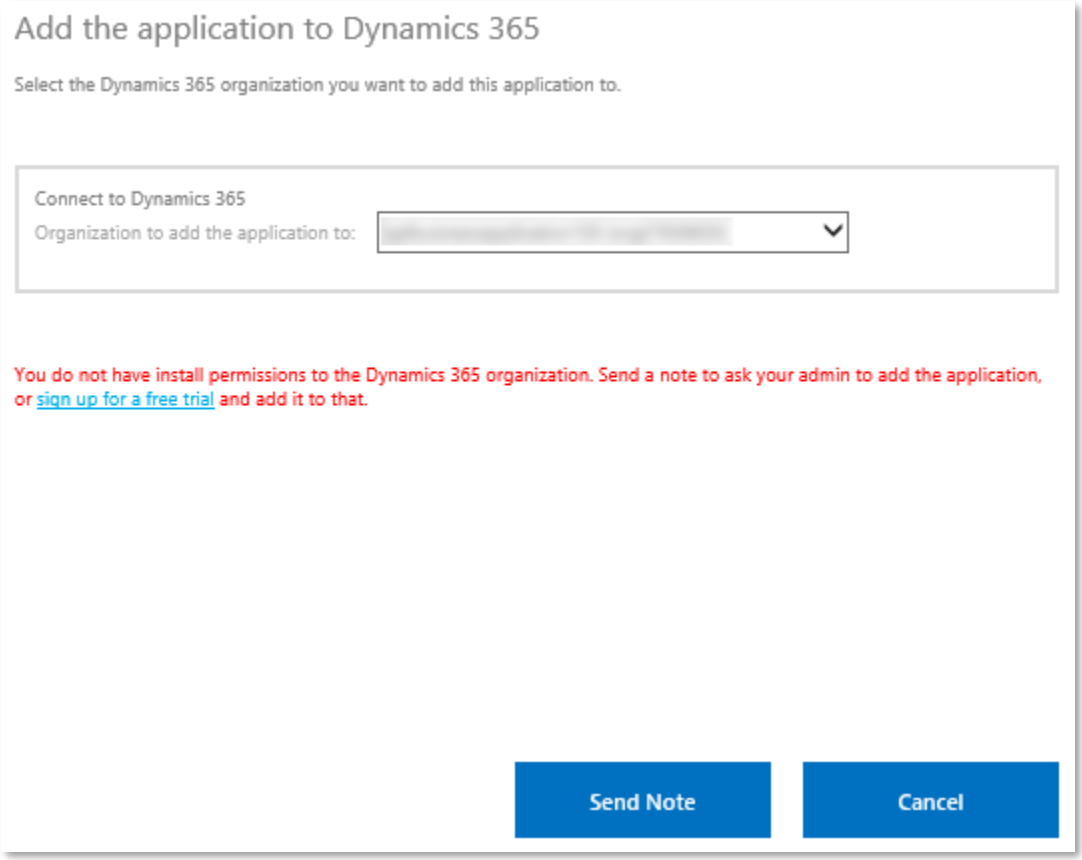
3. Follow the instructions to download and install the solution.

> **Note**
>
> This process is managed by the Dynamics 365 installation site, and may take several minutes for the solution to move through the queue and install on your organization's specific CRM instance.

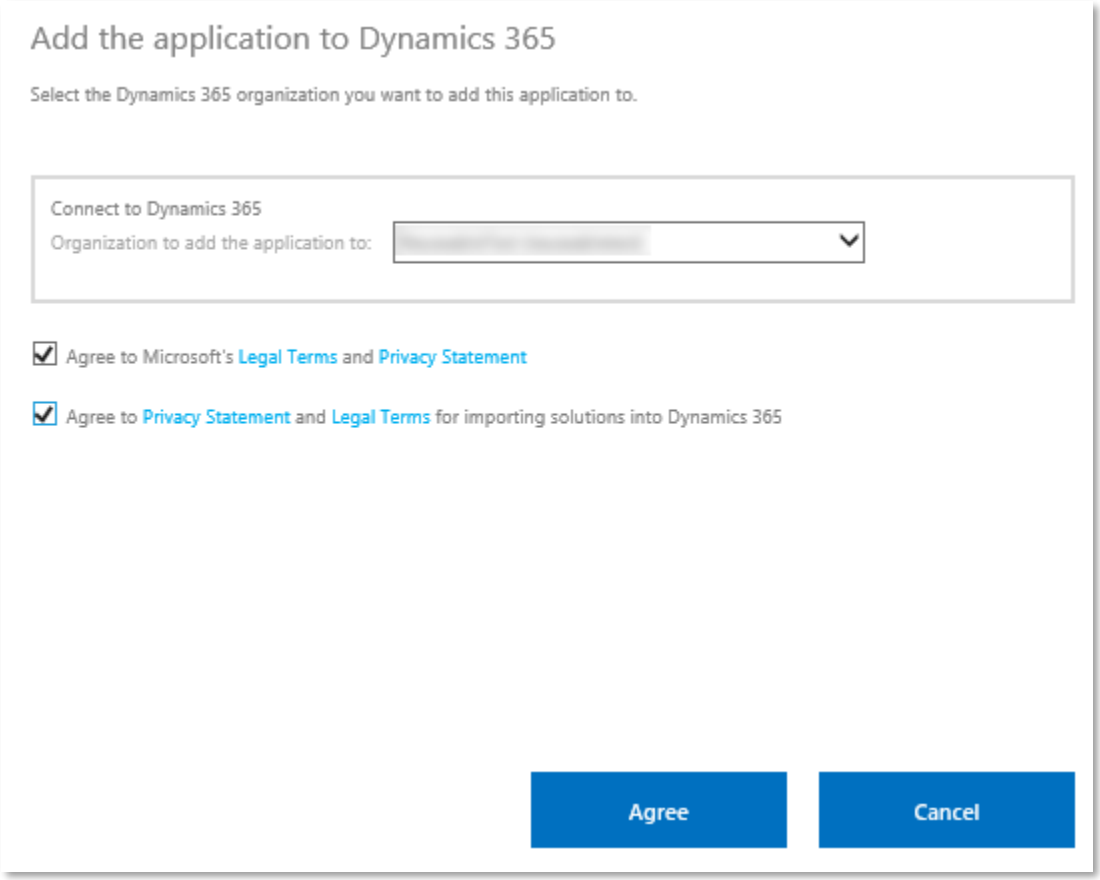
a. Click on the **GET IT NOW** button.
b. Agree to the Terms by clicking the checkbox, then click **Continue**. Example given below.



c. Scroll down to Add the application to Dynamics 365. From the dropdown list, select your organization.

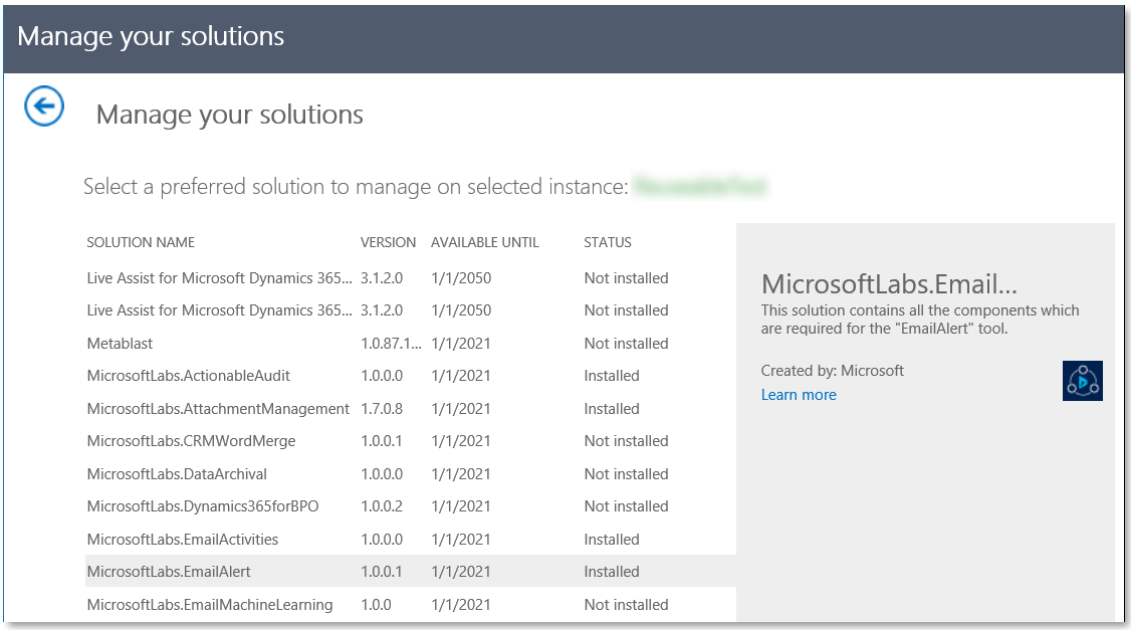


d. Click on both checkboxes to agree to the Terms, then click **Agree** to begin the installation. The screen will appear inactive for several minutes while the request is queued in the background.



e. If the request has been successfully queued, the page redirects to *Manage your solutions*. This is a list of possible add-ons solutions provided with their version and status details. Scroll to the bottom of the list, page forward until the specific solution is found, and check the status for Installed or Pending.
    - Not installed: See Troubleshooting.
    - Installation pending: This is expected, and may take a few more minutes to complete.
    - Installed: Success!
    - Update available: See Troubleshooting.

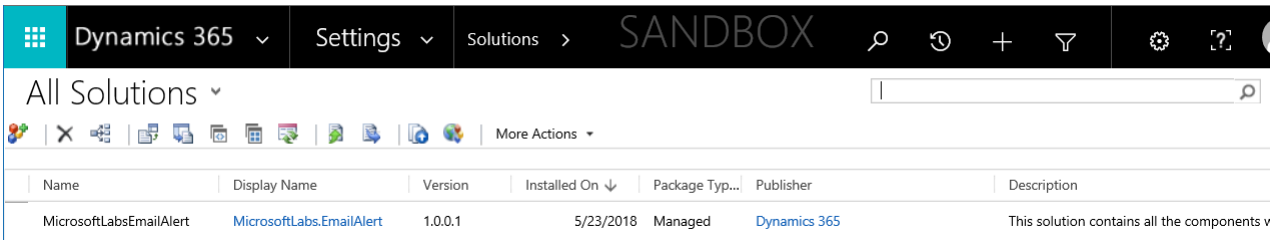
If pending, refresh the page and wait for a new update which can several minutes. Once the status changes to Installed, verify in CRM. Example of success given below.



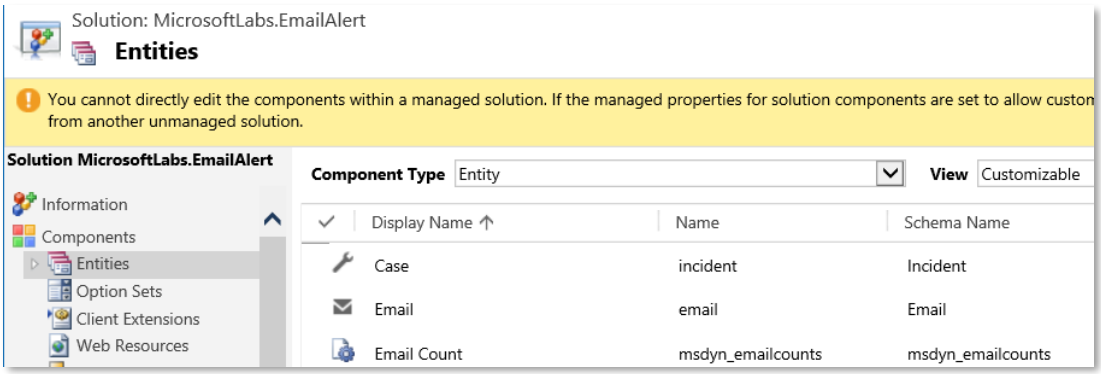
Verifying Solution Installation

To confirm that Email Alert is successfully installed in Dynamics 365

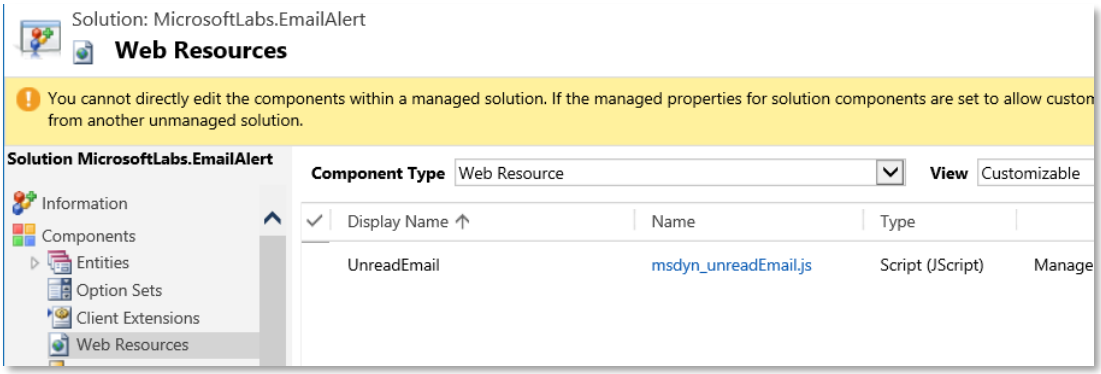
1. On the **Dynamics 365** menu, click **Settings**, then in Customization, click **Solutions**.
2. Check if **MicrosoftLabs.EmailAlert** is available.



3. Click on the **MicrosoftLabs.EmailAlert** link, and click on **Entities** to view the Components.



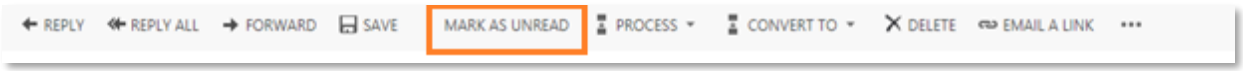
4. Finally, click on Web Resources and verify that **msdyn_unreadEmail.js** is listed.



If the verification fails, go to https://appsource.microsoft.com/ and search for the solution name, then follow the instructions for installation.

Follow-On

Future email activity will have **MARK AS READ** and **MARK AS UNREAD** buttons should be visible on the received email blade.

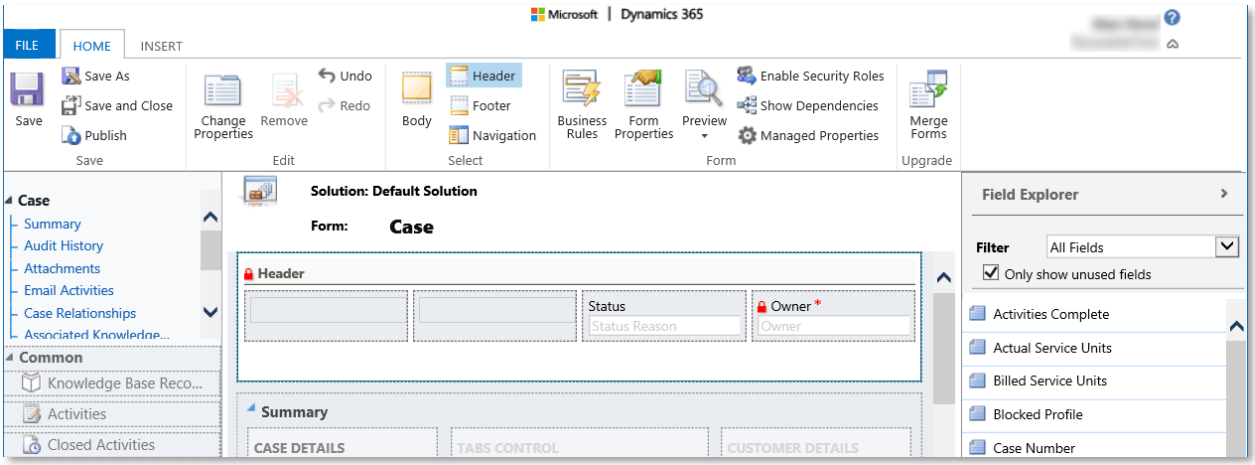


Configuration

To setup the email alert solution, we need to modify both the Case and Email main forms.

Edit Case Main Form

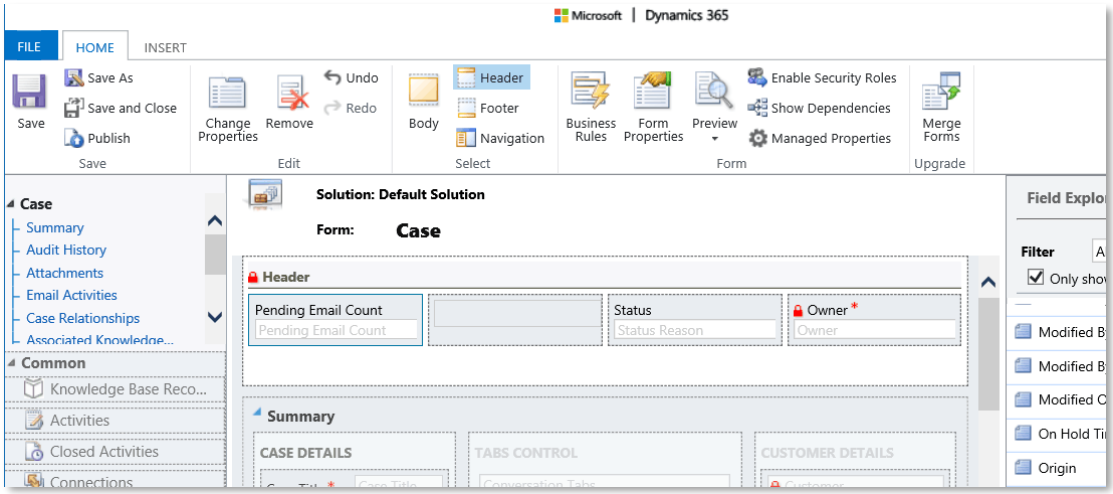
1. On the **Dynamics 365** menu, click **Settings**, in Customization, click **Customizations**, then click **Customize the System**.
2. On the left view below Components, click **Entities** to expand.
3. Click to expand the **Case** Entity.
4. Below Case, click **Forms**.
5. Edit the Case Main Form (Form-type: **Main**).
6. From the Top Menu, in the Home Tab, click on **Header** to edit that section.



Important

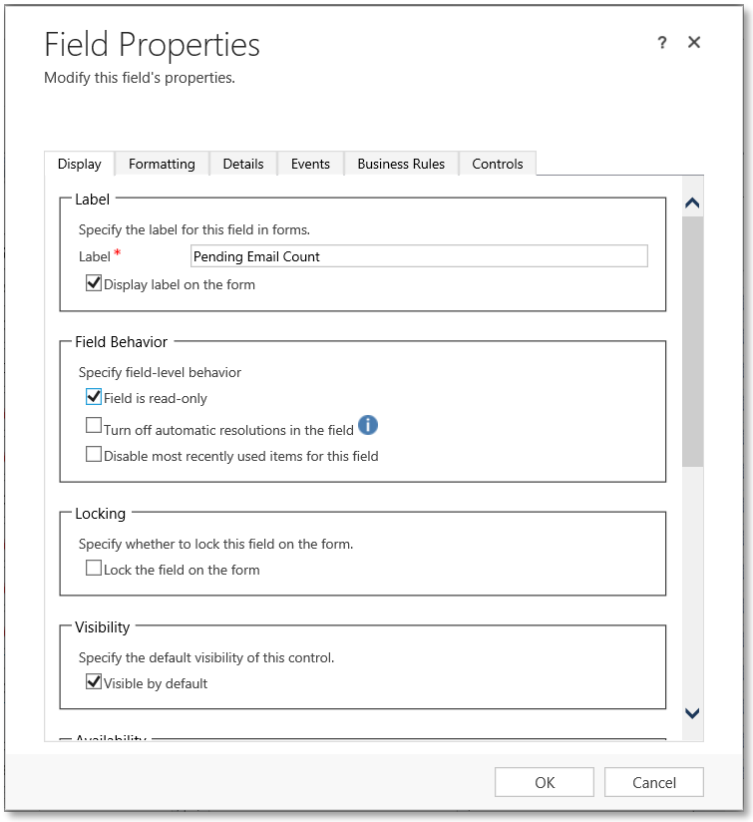
If the Header section is already populated with four fields, it will not be possible to add another. See *Troubleshooting* below for the workaround, and then return to complete this step.

7. Add the **Pending Email Count** field to the form.
   a. Using the *Field Explorer* on the right side of the form, double-click on **Pending Email Count**; this will add the field to the Header section.



   b. With the **Pending Email Count** selected, double-click, or click on **Change Properties** from the Top Menu to view the Field Properties, and set/confirm the following values:
      - **Label:** Pending Email Count
      - **Display label on the form:** Checked

- **Field is read-only:** Checked
- **Visible by default:** Checked



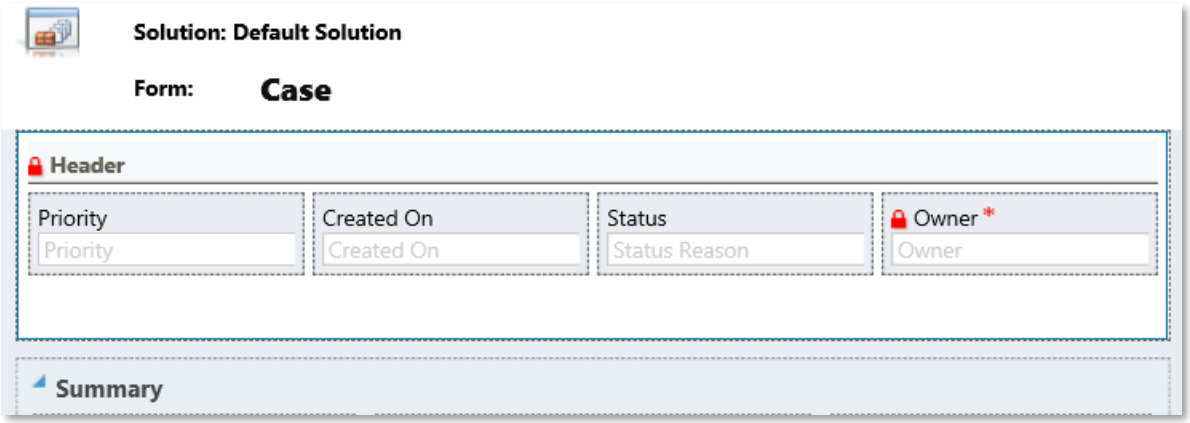
c. Click **OK** to save and continue.

8. **Save** and **publish** the Case Main form.

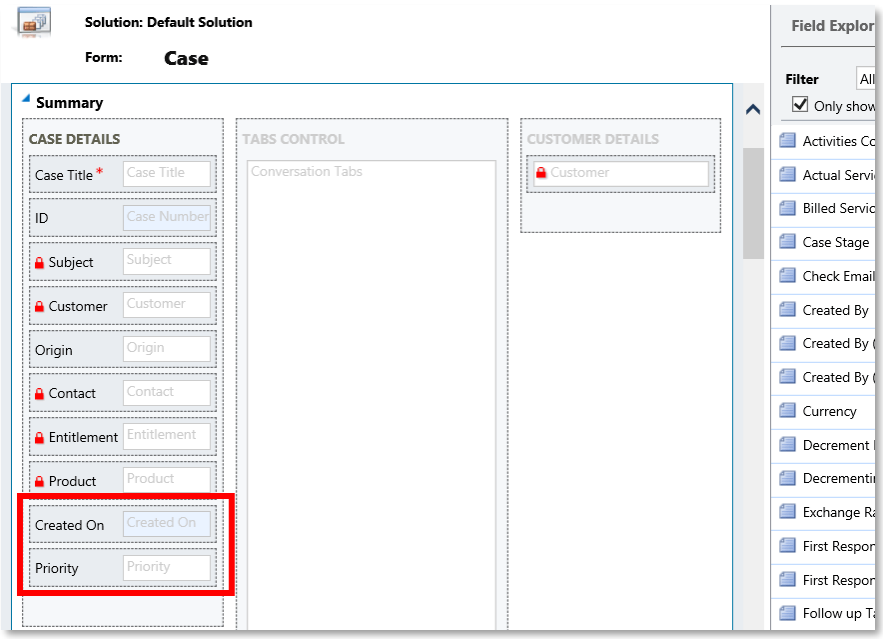
Troubleshooting

If the Header section is already populated with four fields, it will not be possible to add another. Given, the Header must have the at least the *Status* and *Owner* fields; these are required, and all other fields are optional. The method below demonstrates how to work around these issues by moving the fields from the Header section into the Body/Summary/Case Details section.

1. With the Main Case Form, (Form-type: **Main**), from the Top Menu, in the Home Tab, click on **Header** to edit that section.



2. Take note of the extra fields in the Header section, and their properties. In this example, *Created On* and *Priority* are considered optional fields. For each field:
   a. **Select** and click **Change Properties** to note and record their values.
   b. Next, **Select** and click **Remove**. Result: The fields will appear in the *Field Explorer* on the right side of the form as *Unused*.
   c. From the Top Menu, in the Home Tab, click on **Body** to edit that section. The *Summary* section should be selected by default.
   d. Select **CASE DETAILS** so that it has the focus.
   e. Use the *Field Explorer* on the right side of the form, and double-click on the unused field *Priority* for example.

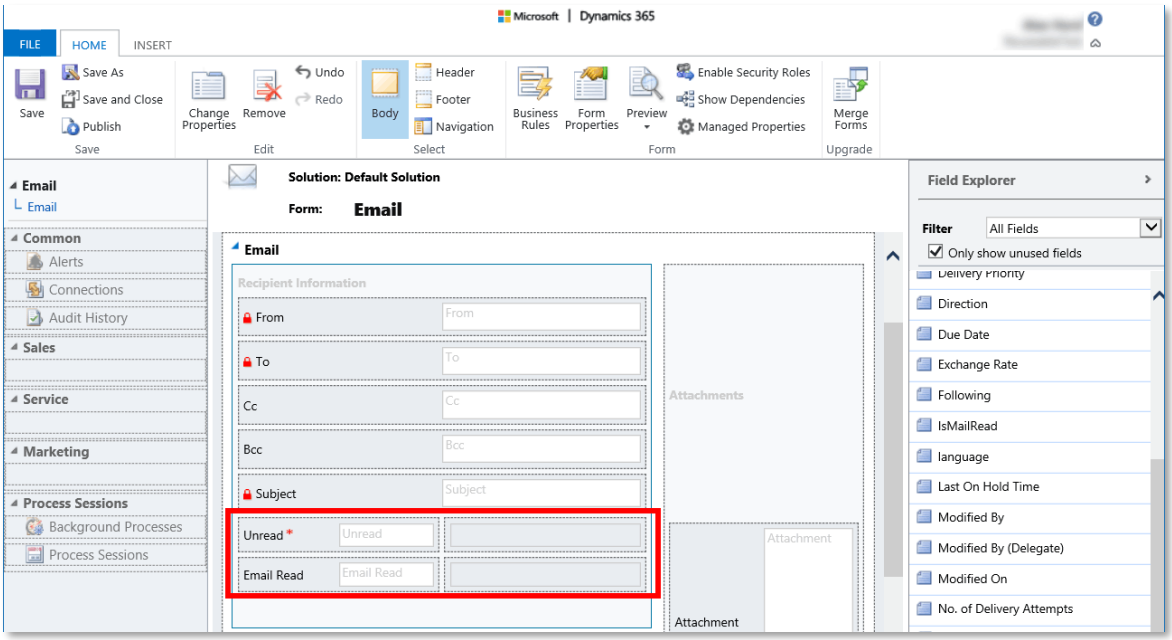


   f. Once placed in the Summary section, double-click, or click on **Change Properties** from the Top Menu to view the Field Properties, and set the values as they once were.
3. Click **Save** to preserve the changes.

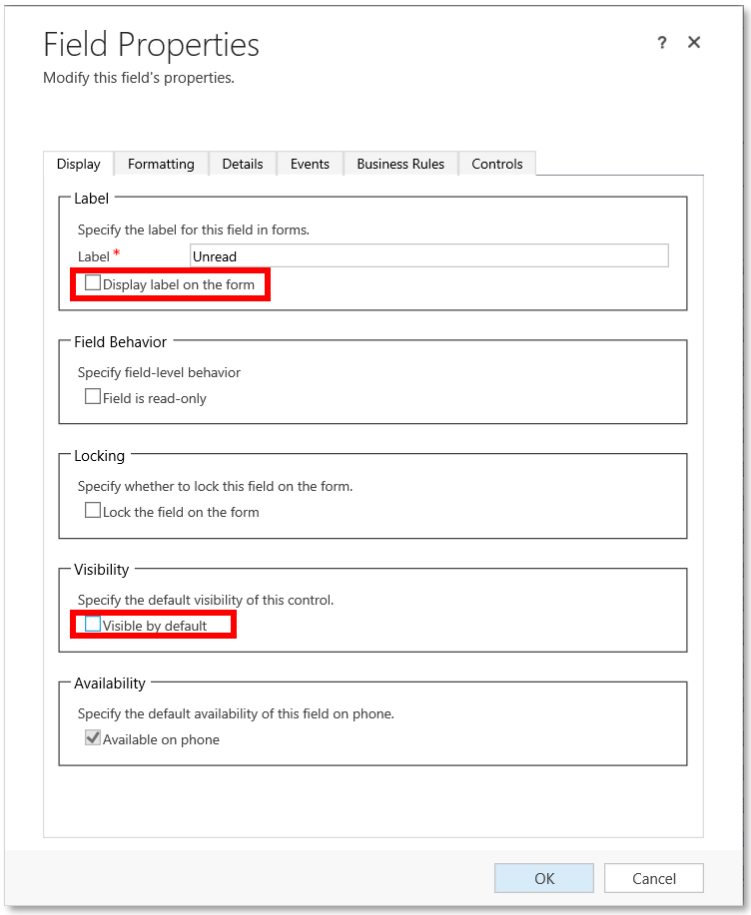
You are now ready to complete the original modification.

Edit Email Main Form

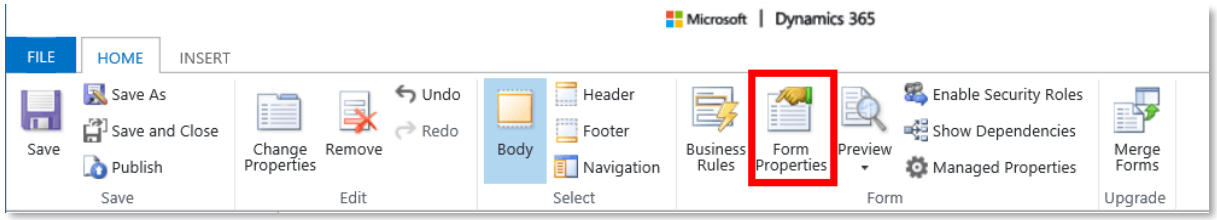
1. On the **Dynamics 365** menu, click **Settings**, in Customization, click **Customizations**, then click **Customize the System**.
2. On the left view below Components, click **Entities** to expand.
3. Click to expand the **Email** Entity.
4. Below Email, click **Forms**.
5. Edit the Email Main form (Form-type: **Main**).
6. Add **Unread** and **Email Read** fields to the form.
    a. The *Email* section in the Body should be selected by default. Select the **Recipient Information** section.
    b. Using the *Field Explorer* on the right side of the form, double-click on **Unread** and **Email Read** fields to add them.



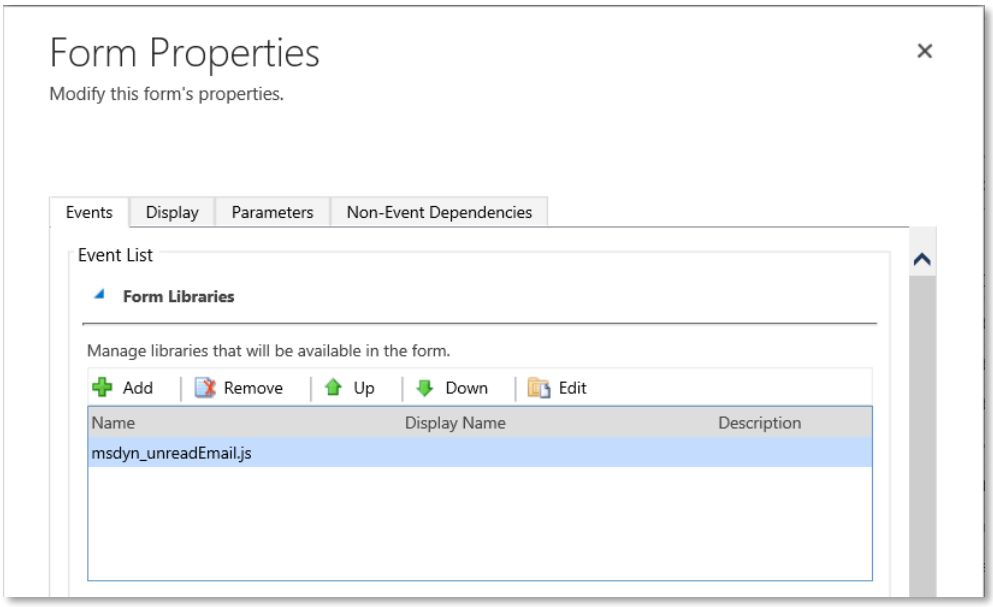
    c. For each new field, double-click, or click on **Change Properties** from the Top Menu to view the Field Properties, and set the values as follows:
        - **Display label on the form:** Unchecked
        - **Visible by default:** Unchecked



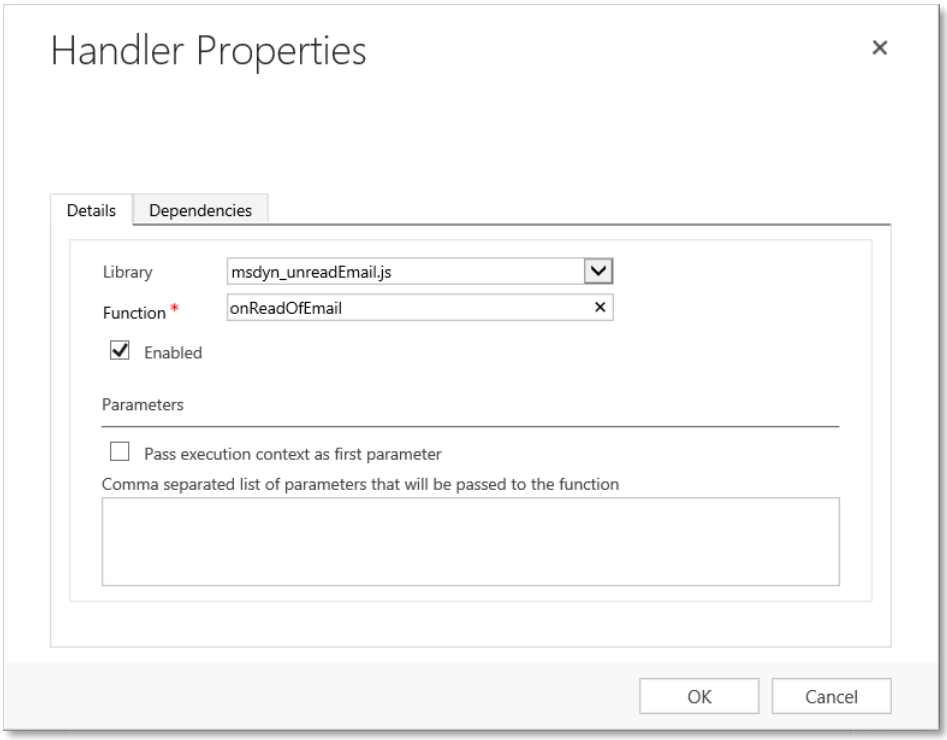
7. From the Top Menu, click **Form Properties**.



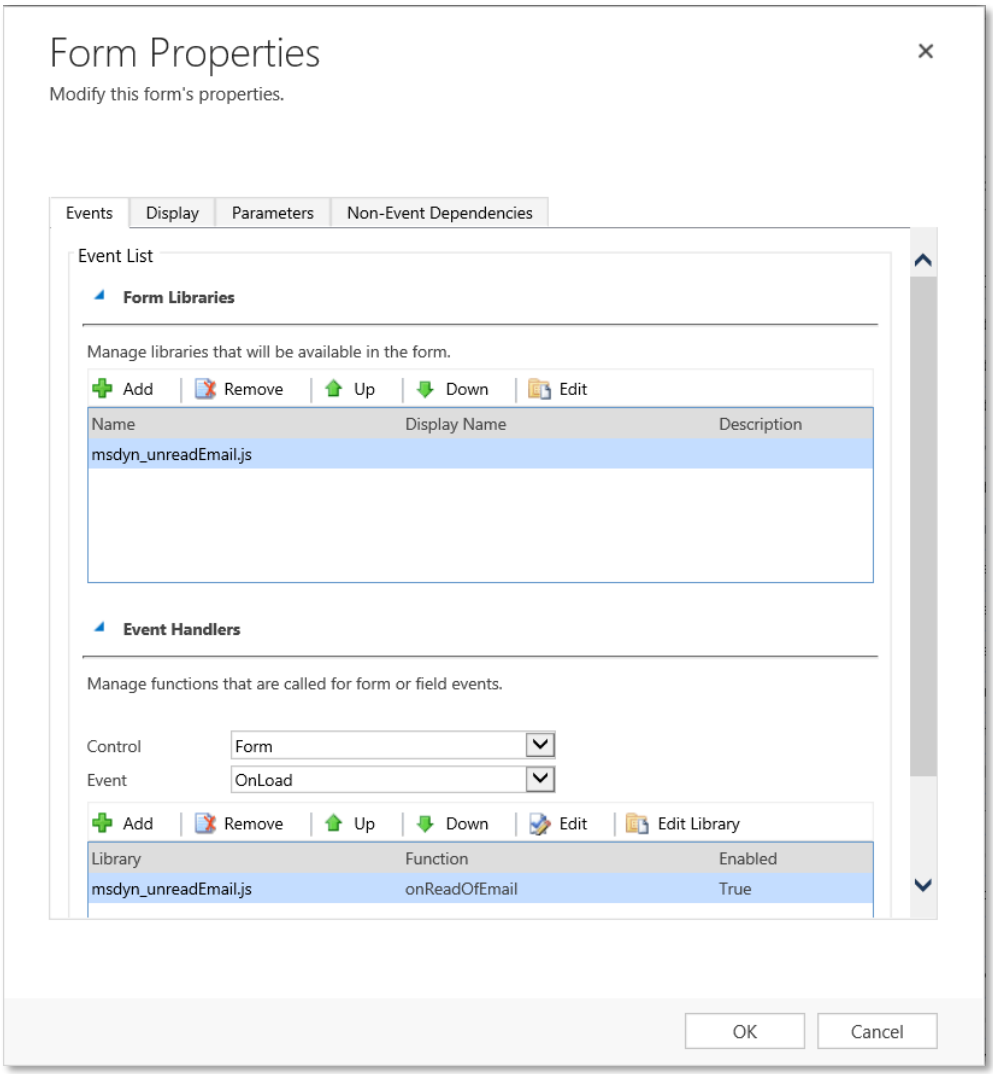
a. With the focus on the Event Tab in the Event List, add "**msdyn_unreadEmail.js**" to the *Form Libraries* section.



b. Again, in the Event List, *Event Handlers* section, with the Event set to *OnLoad*, add "**msdyn_unreadEmail.js**" and set the Function value to **onReadOfEmail**.



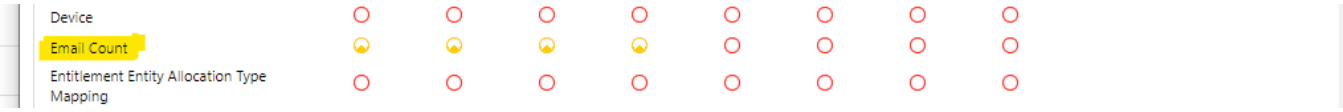
When completed the Form Properties will appear configured as below.



8. **Save** and **publish** the Email Main form.

Other than System Administrator

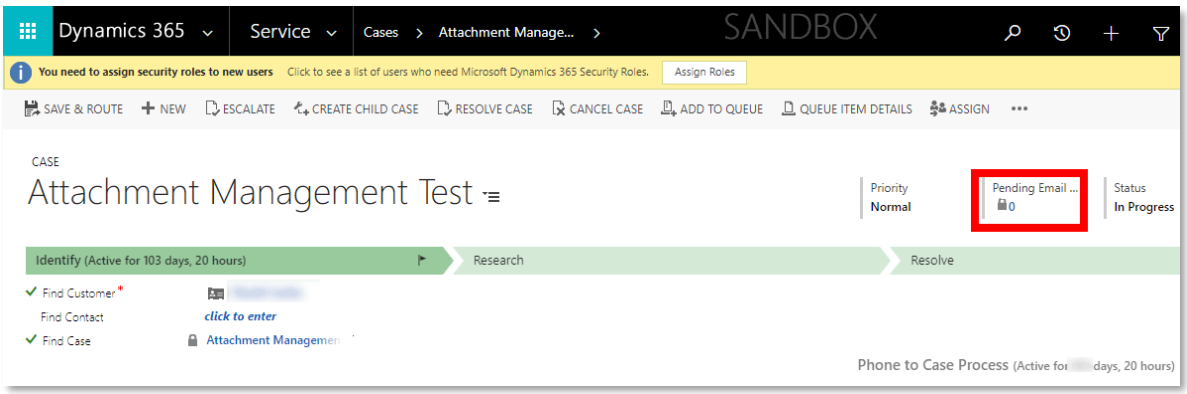
Admins need to provide User Level access on Email Count (msdyn_emailcounts) Entity for selected Security Role other than System Administrator as shown below



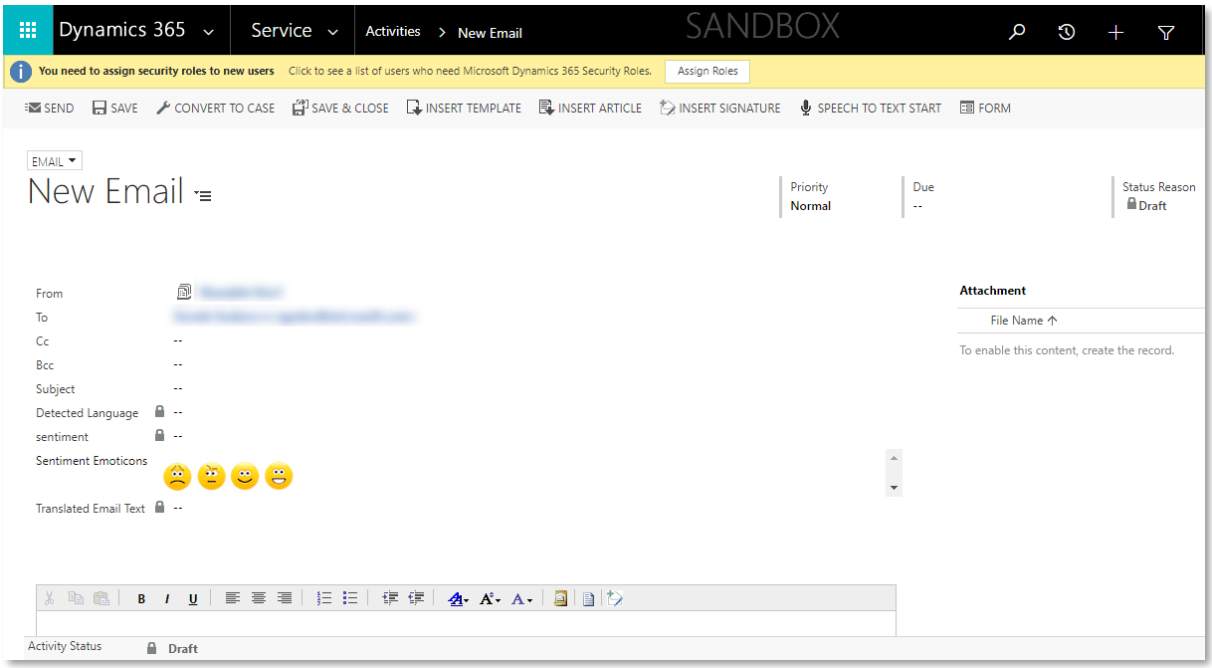
Email Alert Functionality

To use the email alert functionality

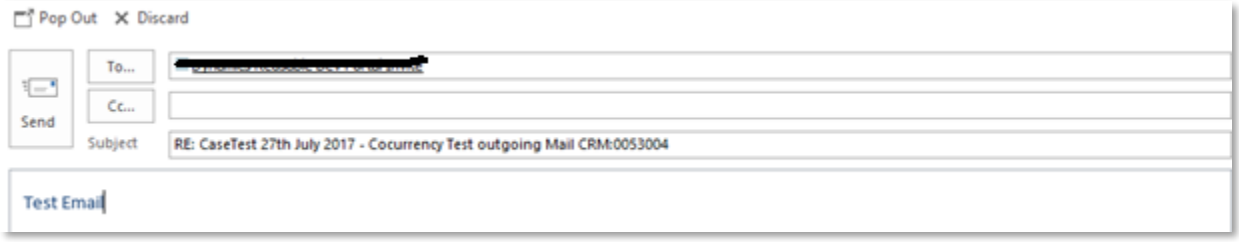
1. Login to your **Dynamics 365** application.
2. Click **Service** and then click **Case**.
3. Create a new case and step it forward. Note the pending email count.



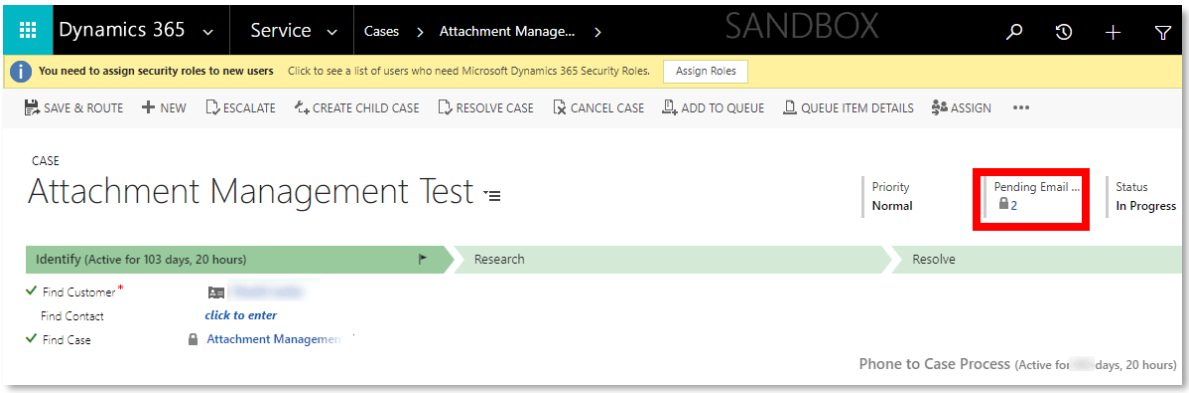
4. Send the email from the Case to any external user.



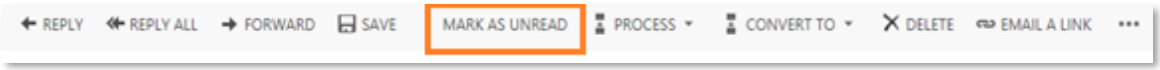
5. Reply to the mail from an external environment.



The **Pending Email Count** field *updates* when the user receives unread email relative to that case.



The **Pending Email Count** field *decreases* as incoming email is read. This count can be changed by selecting the **MARK AS READ** or **MARK AS UNREAD** from the menu.



Scenario

User receives email about a pending case, which they open to view. However they cannot act on it right away, so they wish to change the status as Unread.

- The User can change the status by clicking **MARK AS UNREAD** on the Email form. This action dynamically *increases* the **Pending Email Count** field on the Case.
- The User can change the status back using **MARK AS READ**, dynamically *decreases* the **Pending Email Count** field on the Case.

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