

MICROSOFT LABS

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EMAIL ALERT

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

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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:

Manage User Roles What roles would you like to apply to the 1 User you have selected?								
Role Name	Business Unit							
Salesperson	1							
Schedule Manager								
Scheduler								
System Administrator								
System Customizer								
Vice President of Marketing								
Vice President of Sales		*						

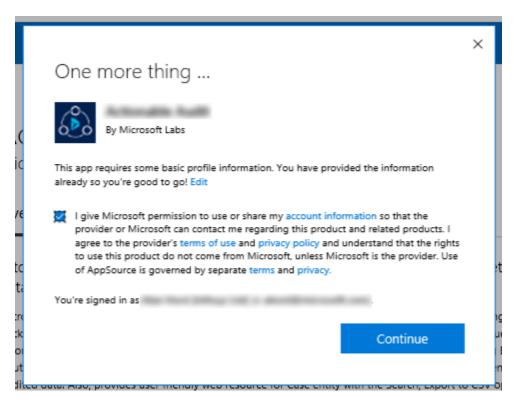
2. Go to AppSource (<u>https://appsource.microsoft.com/</u>) and search for the solution name, "Email Alert".

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.

Add the application to Dyn	namics 365	
Select the Dynamics 365 organization you wa	nt to add this application to.	
Connect to Dynamics 365 Organization to add the application to:	ali	~
You do not have install permissions to the Dy or sign up for a free trial and add it to that.	namics 365 organization. Send a note to ask you	ir admin to add the application,
	Send Note	Cancel

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.

Add the application to D	ynamics 365	
elect the Dynamics 365 organization you	want to add this application to.	
Connect to Dynamics 365		
Organization to add the application to:	Second Contract Second	~
Agree to Microsoft's Legal Terms and I	rivacy Statement	
Agree to Privacy Statement and Legal	Terms for importing solutions into Dynamics 365	
	Agree	Cancel

- 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.

Mana	Manage your solutions												
€	Manage your solution	S											
	Select a preferred solution to manage on selected instance:												
	SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS									
	Live Assist for Microsoft Dynamics 365	3.1.2.0	1/1/2050	Not installed	MicrosoftLabs.Email								
	Live Assist for Microsoft Dynamics 365	3.1.2.0	1/1/2050	Not installed	This solution contains all the components which								
	Metablast	1.0.87.1	1/1/2021	Not installed	are required for the "EmailAlert" tool.								
	MicrosoftLabs.ActionableAudit	1.0.0.0	1/1/2021	Installed	Created by: Microsoft								
	MicrosoftLabs.AttachmentManagement	1.7.0.8	1/1/2021	Installed	Learn more								
	MicrosoftLabs.CRMWordMerge	1.0.0.1	1/1/2021	Not installed									
	MicrosoftLabs.DataArchival	1.0.0.0	1/1/2021	Not installed									
	MicrosoftLabs.Dynamics365forBPO	1.0.0.2	1/1/2021	Not installed									
	MicrosoftLabs.EmailActivities	1.0.0.0	1/1/2021	Installed									
	MicrosoftLabs.EmailAlert	1.0.0.1	1/1/2021	Installed									
	MicrosoftLabs.EmailMachineLearning	1.0.0	1/1/2021	Not installed									

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.

Dynamics	365 ~	Setting	s v s	Solutions	>	Sande	30X	Q	Ş	+	∇	£.,;	[?]
All Solutions		. .	Ø 61	More Act	ions 🔹								Q
Name	Display N		Version	Insta	alled On 🗸	Package Typ	Publisher			Des	cription		
MicrosoftLabsEmailAlert	Microsoft	Labs.EmailAlert	1.0.0.1		5/23/201	8 Managed	Dynamics 365			This	solution cor	ntains all the o	components v

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

Solution: MicrosoftLabs.EmailAlert										
Pou cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow custor from another unmanaged solution.										
Solution MicrosoftLabs.Emai	Alert	Compo	onent Type Entity		~	View Customizable				
🐉 Information	~		Display Name 🛧	Name		chema Name				
Components		*	Display Name 1	Name						
Entities		×	Case	incident	1	ncident				
Option Sets			F			F				
🕍 Client Extensions		~	Email	email	1	Email				
Web Resources		à	Email Count	msdyn_emailcounts		msdyn_emailcounts				

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

Solution: Microsol		nailAlert			
You cannot directly edit from another unmanage		2	If the managed properties for solution o	omponents are set t	to allow custon
Solution MicrosoftLabs.Ema	ilAlert	Component Type Web Resour	ce	View (Customizable
Information Components	^	✓ Display Name ↑	Name	Туре	
 Entities Option Sets 		UnreadEmail	msdyn_unreadEmail.js	Script (JScript)	Manage
Client Extensions					

If the verification fails, go to <u>https://appsource.microsoft.com/</u> 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.

+ REP	LY 🛛 🛠 REPLY ALL	➔ FORWARD	SAVE	MARK AS UNREAD	PROCESS -	CONVERT TO 👻	X DELETE	🖘 EMAIL A LINK	•••	
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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.

FILE HOME INSE	RT		Microsoft Dynamics 365			2	
Save As Save As Save As Save and Clos Save Save Save	ک ا	Undo Redo Body Elect Header Footer Navigation Select	Business Form Preview	Enable Security Roles Bhow Dependencies	Merge Forms Upgrade		
Case Summary Audit History Attachments	Solu Form	tion: Default Solution n: Case			•	Field Explorer Filter All Fields ☑ Only show unused fields	>
Email Activities Case Relationships Associated Knowledge Common	-		Status Status Reason	Owner *		 Activities Complete Actual Service Units 	^
Knowledge Base R	eco Summary					Billed Service Units Blocked Profile	
👌 Closed Activities	CASE DETAIL	TABS CONTRO	DL C	USTOMER DETAILS		📒 Case Number	

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.

FILE HOME INSERT		1	Microsoft Dynamics 365			
Save As Save As Save and Close Publish Save	Change Properties Edit	Body Header Body Footer Navigation Select	Business Rules Properties Preview Form	Show Dependencies Managed Properties	Merge Forms Upgrade	
Case Summary Audit History Attachments	Solution: D Form:	efault Solution				Field Explor Filter A
Email Activities Case Relationships Associated Knowledge Common	Pending Email Count Pending Email Count		Status Status Reason	Owner *		Modified B
Knowledge Base Reco	CASE DETAILS	TABS CONTR	201			Modified C
Connections		Title Conversation				Origin

- 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

Field Properties ? Modify this field's properties.	×
Display Formatting Details Events Business Rules Controls	
Label	~
Specify the label for this field in forms.	
Label * Pending Email Count	
Display label on the form	
Field Behavior	
Specify field-level behavior	
Field is read-only	
Turn off automatic resolutions in the field	
Disable most recently used items for this field	
Specify whether to lock this field on the form.	
Visibility	
Specify the default visibility of this control.	
✓ Visible by default	
	~
- Availability	
OK	el

- 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.

a	Solution: Default Solution					
	Form:	Case				
🔒 Header						
Priority Priority		Created On Created On	Status Status Reason	Owner*		
Summ	ary					

- 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.

Summary				~	Filter Only sh
CASE DETAILS		TABS CONTROL	CUSTOMER DETAILS		Activities
Case Title *	Case Title	Conversation Tabs	Customer		🗐 Actual Se
ID	Case Number				📒 Billed Ser
🔒 Subject	Subject				🗐 Case Sta
	Customer				Check En
Customer					Created I
Origin	Origin				Created I
🔒 Contact	Contact				Created I
🔒 Entitlement	Entitlement				Decreme
A Product	Product				Decreme
Created On	Created On				🗐 Exchange
					🗐 First Resp

- 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.

FILE HOME INSERT			Microsoft Dynamics 365			@ &	
	ange perties Edit	Body Eect	Business Form Preview	ble Security Roles w Dependencies naged Properties Upgrade			
⊿ Email L Email		efault Solution Email				Field Explorer	>
Common Alerts Onnections	Email Recipient Information	DU			^	Filter All Fields Image: Only show unused fields Image: Only show unused fields Image: Delivery Priority Image: Only show unused fields	~
Audit History Sales	From	From				Direction Due Date	
▲ Service	Cc	To Cc	Attachn	ients		Exchange Rate Following	
Marketing	Bcc	Bcc				 IsMailRead Ianguage 	
Process Sessions Background Processes	Subject	Subject		Attachment		Last On Hold Time Modified By	
Process Sessions	Email Read En	nail Read				 Modified By (Delegate) Modified On 	
			Attachn	nent		No. of Delivery Attempts	

- 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

Field Properties Modify this field's properties.	? X
Display Formatting Details Events Business Rules Controls Label Specify the label for this field in forms.	
Label * Unread	
Field Behavior Specify field-level behavior Field is read-only	
Locking Specify whether to lock this field on the form. Dock the field on the form	
Visibility	
Availability Specify the default availability of this field on phone. Available on phone	
ОК	Cancel

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.

Events	Display	Parameters	Non-Event D	ependencies	1		
Mana	ge libraries th	at will be availa	ble in the forr	۱.			- 1
	Add 🛛 🔿 🛙	Remove 1	Up 🛛 🐥	Down	📑 Edit		
- 🕂 /	luu 🚺 r						
Nam		1 -	Disp	ay Name		Description	

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**.

Hand	dler F	Properties	×
Details	Depende	encies	
\checkmark	ary ction * Enabled ameters	msdyn_unreadEmail.js	
	Pass exec	cution context as first parameter ted list of parameters that will be passed to the function	
		ОК	Cancel

When completed the Form Properties will appear configured as below.

Event List					
Form Lil	oraries				
Manage libra	ries that will be avai	lable in the form.			
🕂 Add	👔 Remove	🚖 Up 🛛 🐺 Dov	wn 🛛 📴 Edit		
Name		Display N	lame	Description	
Event Harden	Indlers				
		for form or field eve	ents.		
		for form or field eve	ents.		
Manage funct	ions that are called	for form or field eve			
Manage funct	ions that are called	for form or field eve	V V	Edit Library	
Manage funct Control Event	Form OnLoad		> >	Edit Library	

8. Save and publish the Email Main form.

Other than System Administrator

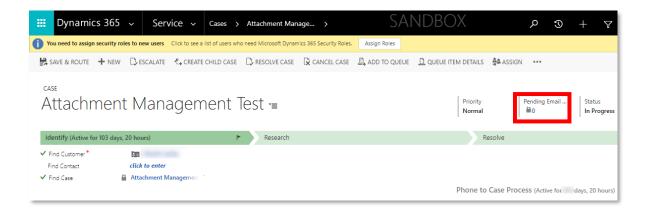
Admins need to provide User Level access on Email Count (msdyn_emailcounts) Entity for selected Security Role other than System Administrator as shown below

	Device	0	0	0	0	0	0	0	0
_	Email Count	\bigcirc	\bigcirc	\bigcirc	\bigcirc	0	0	0	0
_	Entitlement Entity Allocation Type Mapping	0	0	0	0	0	0	0	0

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.



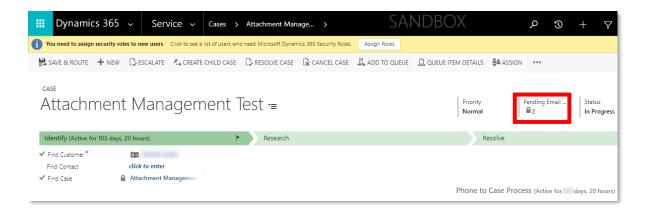
4. Send the email from the Case to any external user.

Ⅲ Dynamics 365 ∨	Service ~	Activities > New Email		Sande	SOX		Q	\odot	+	\mathbf{V}
You need to assign security roles to ne	ew users Click to see a	list of users who need Microsoft Dyn	amics 365 Security Roles.	Assign Roles						
🖾 SEND 🔒 SAVE 🎤 CONVERT 1	TO CASE 📲 SAVE &	CLOSE 🕞 INSERT TEMPLATE	INSERT ARTICLE	أ⊘ INSERT SIGNATURE	🍨 SPEECH TO	TEXT START	E FORM			
^{EMAIL} ▼ New Email -=					Priority Normal	Due 			Statu Di	s Reason raft
From							Attachment			
То	and the second second						File Name	• 1		
Cc							To enable this o	ontent, cr	eate the re	cord.
Bcc										
Subject Detected Language 🔒										
sentiment										
Sentiment Emoticons	<mark>0 8</mark>									
Translated Email Text 🔒										
Activity Status		: 谆 谆 <u>タ</u>. A. A.	- 2 2 3							

5. Reply to the mail from an external environment.

Cĩ P	op (Dut 🗙 Dis	card				
1		То					
Sen		Cc					
	_	Subject	RE: CaseTest 27th July 2017 - Cocurrency Test outgoing Mail CRM:0053004				
Te	Test Email						

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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