



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.*

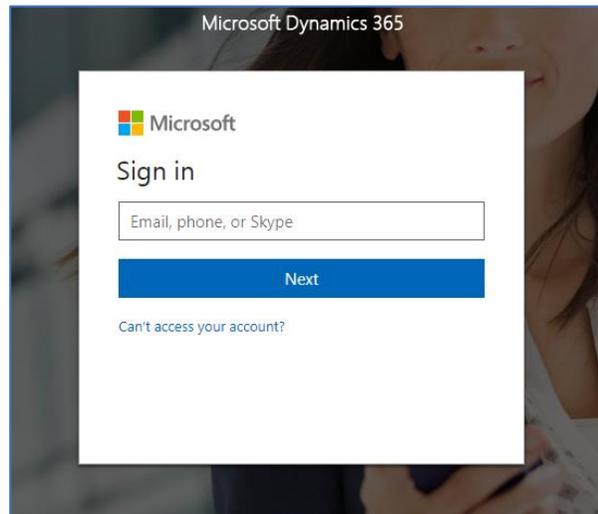
This solution, built on Dynamics 365, seamlessly works with Dynamics CRM 2016 version and later versions.

D365 Modern Email Interface Configuration

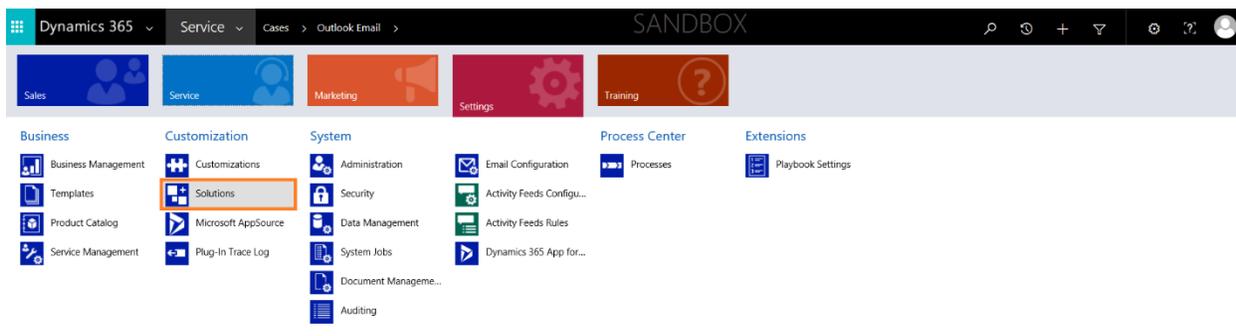
The Email Management solution can be used in case, contact or any other entities. This section outlines the steps to be performed by a System Administrator to make Solution available in Dynamics 365 CRM to the end users.

UI Configuration

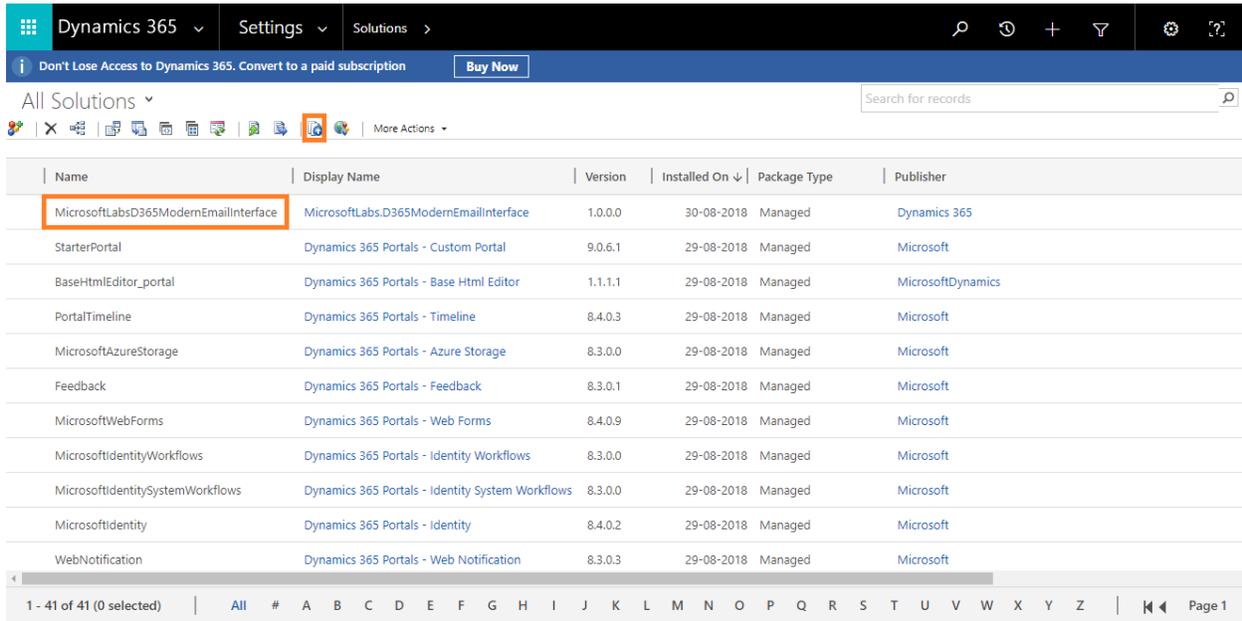
1. Log into CRM instance by giving the appropriate username and password with **admin** role.



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



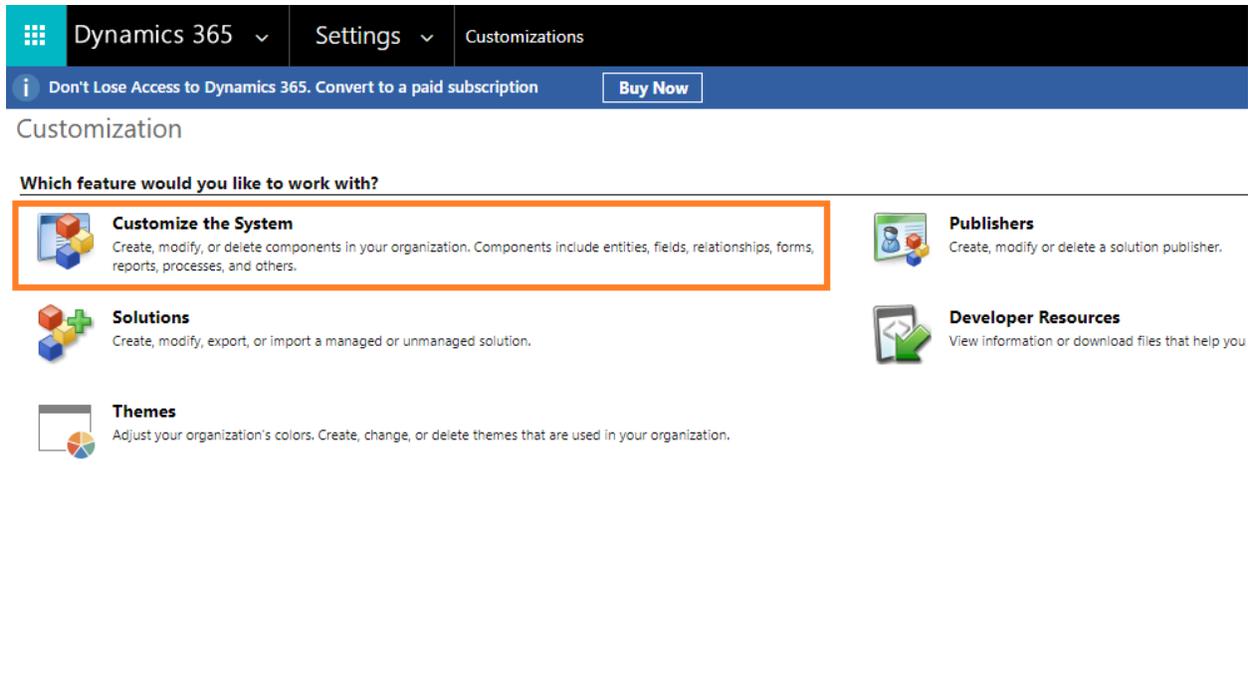
3. Now **import** D365 Modern Email Interface and **Publish** to avail the customizations.



The screenshot shows the Dynamics 365 interface with the 'Solutions' menu open. A table lists various solutions installed in the organization. The solution 'MicrosoftLabsD365ModernEmailInterface' is highlighted with an orange border. The table has columns for Name, Display Name, Version, Installed On, Package Type, and Publisher.

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.



The screenshot shows the Dynamics 365 'Customization' page. The 'Settings' menu is open, and the 'Customizations' option is selected. The page title is 'Customization'. Below the title, there is a section 'Which feature would you like to work with?' with four options: 'Customize the System', 'Solutions', 'Themes', 'Publishers', and 'Developer Resources'. The 'Customize the System' option is highlighted with an orange border.

Customize the System
Create, modify, or delete components in your organization. Components include entities, fields, relationships, forms, reports, processes, and others.

Solutions
Create, modify, export, or import a managed or unmanaged solution.

Themes
Adjust your organization's colors. Create, change, or delete themes that are used in your organization.

Publishers
Create, modify or delete a solution publisher.

Developer Resources
View information or download files that help you

Case

Forms

Solution Default Solution

- Campaign
- Campaign Activity
- Campaign Response
- Case
 - Forms
 - Views

System Forms **Active Forms** ▾

New ▾ | Delete | Enable Security Roles | Form Order ▾ | Activate

Name	Form State	Form Type ↑
Case	Active	Main

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

PowerApps

FILE HOME **INSERT**

Section Three Columns Three Columns Two Columns Two Columns One Column Sub-Grid Spacer Quick View Form Web Resource Bing Maps Navigation Link Social Insights Timer Knowledge Base Search ACI Control Relationship Assistant Predictive Lead Scoring

Solution 1-Column

Form: Insert a one-column tab.

Header

Unread Email	Candidate	Queue	Owner*
Unread Email	Candidate	Current Queue Name	Owner

Summary

Case Details	Attorney Assignment	Tags
Candidate	Program Manager	Tags
Template Name *	Paralegal	Tags
Template Name	Attorney	Tags
Category	Backup Attorney 1	Open Quality Tickets
Legal Group *	Backup Attorney 2	Open Quality Tickets
Legal Queue *		
Case ID	Candidate/Foreign National Details	Case Dates
Case Priority	First Name	Receipt No
H-1B Cap Type	Last Name	mims_USCISCaseStatusHyperlink

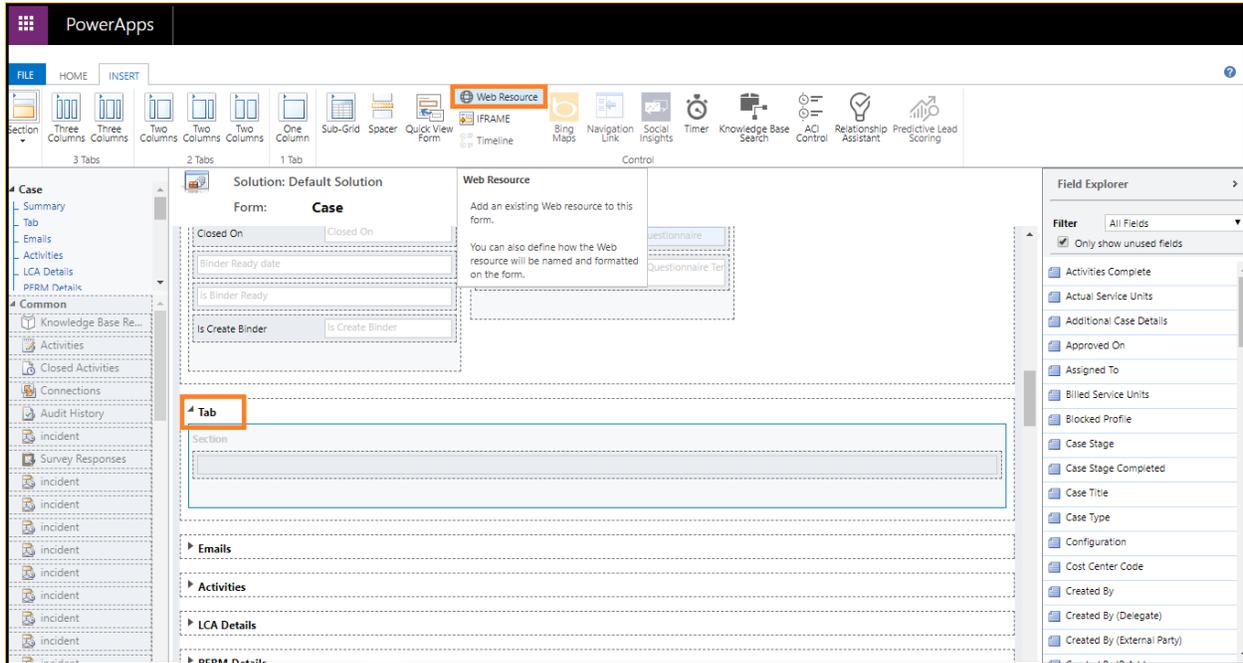
Field Explorer

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)
- Created By IP Address

- 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

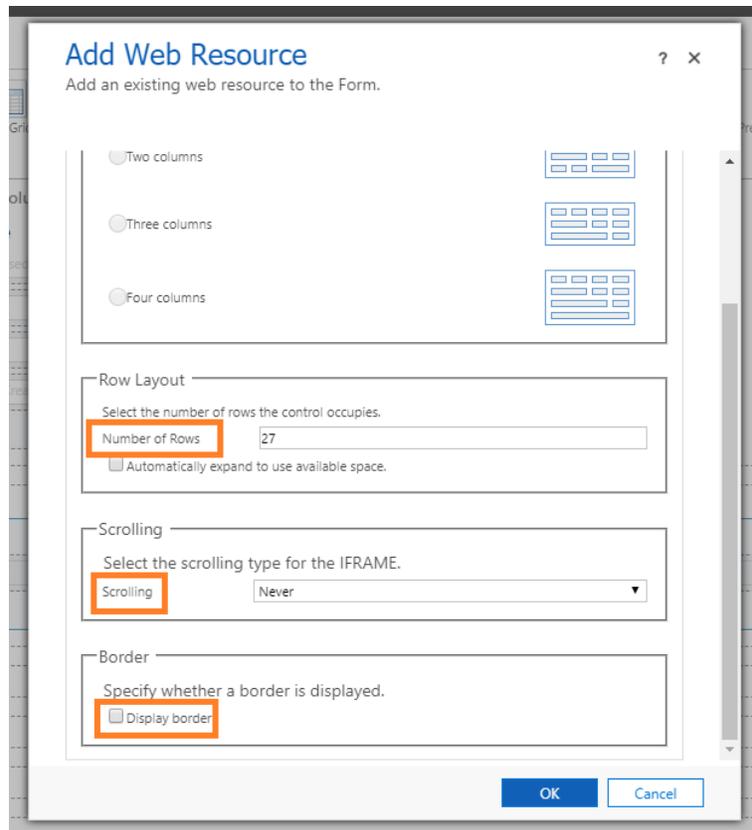
Custom Parameter(data)

Restrict cross-frame scripting, where supported.

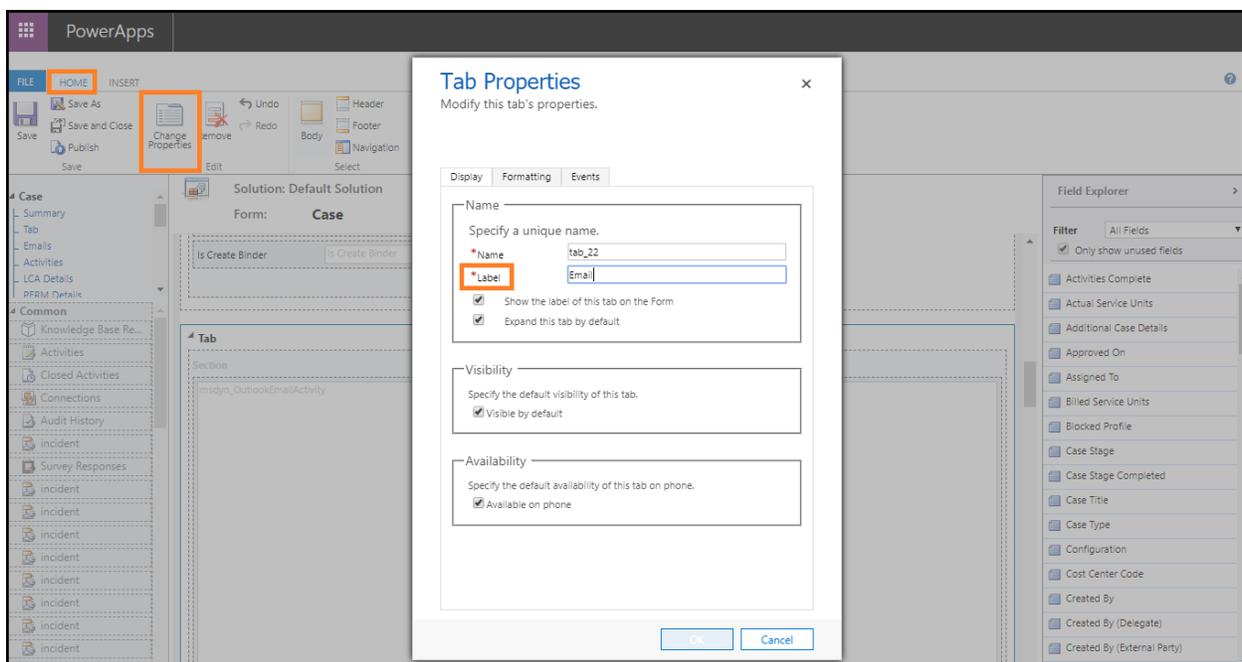
Pass record object-type code and unique identifier as parameters.

OK Cancel

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



9. 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.

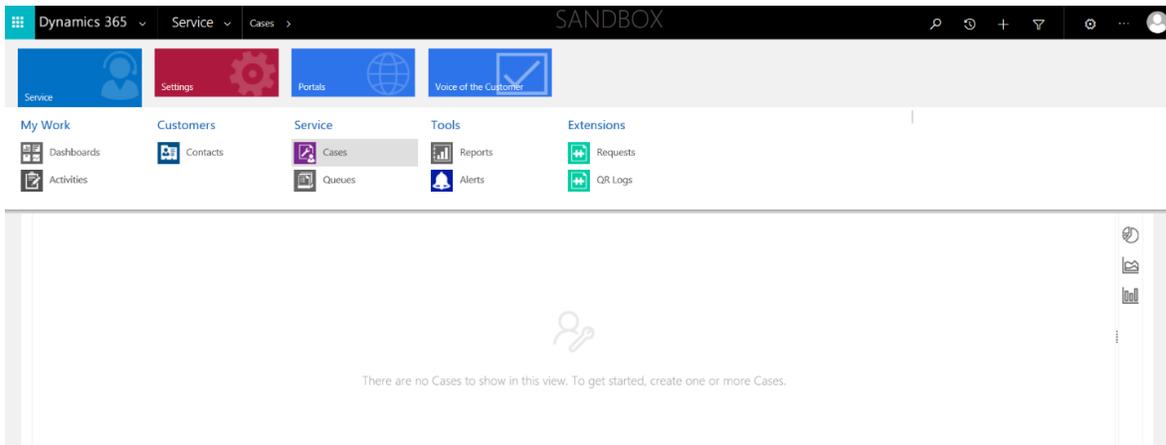


10. Save and publish the form.

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

User Experience

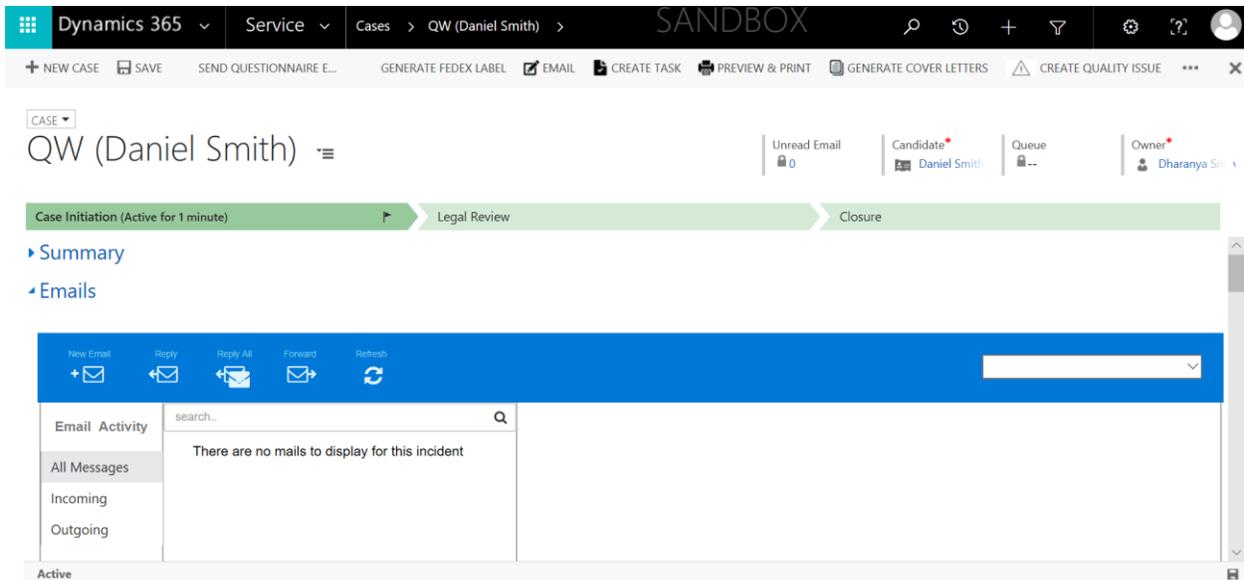
1. Navigate to **Services** -> **Cases**.



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

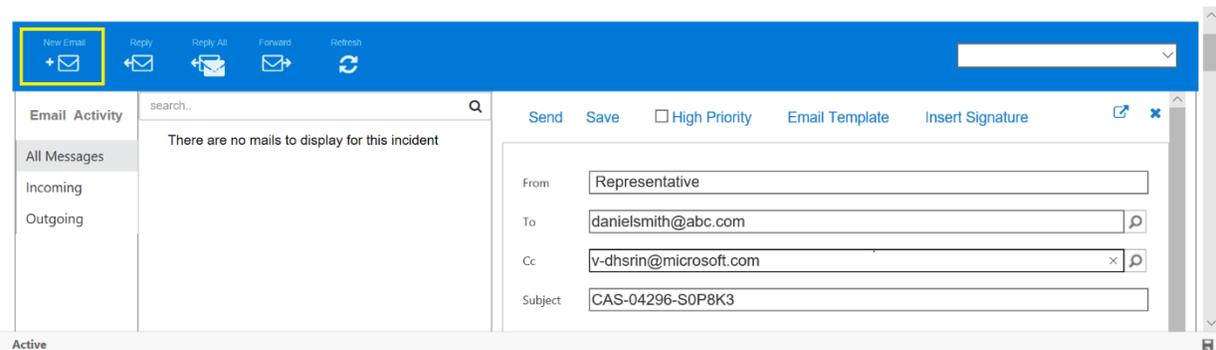
3. Double Click on any case record and we will be able to see the email management solution as a separate tab named as **'Email'**.



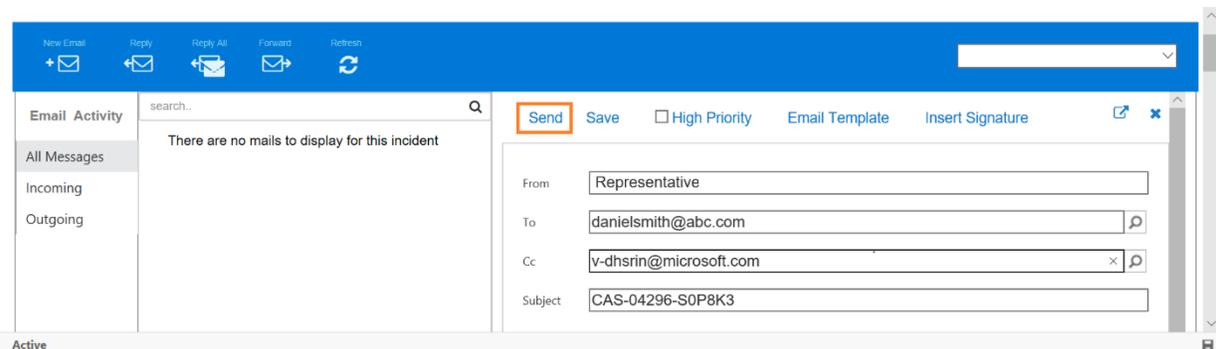
Email Management Features

Emailing options

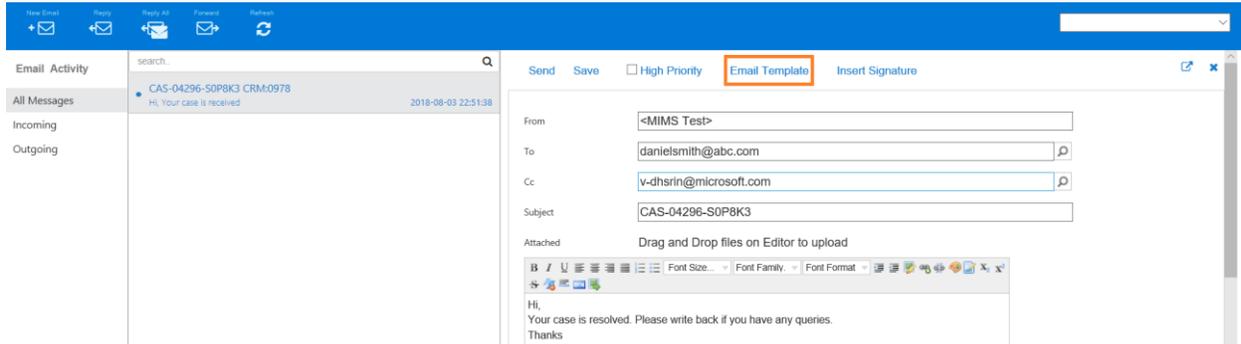
1. Click on **New Email** button on the ribbon header to create a new Email.



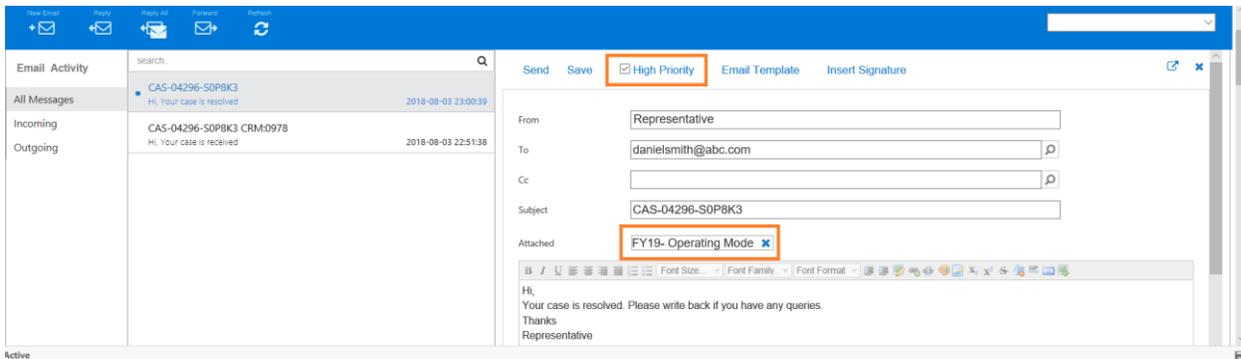
2. Draft the email, add the recipients and click on **Send** to send an Email.



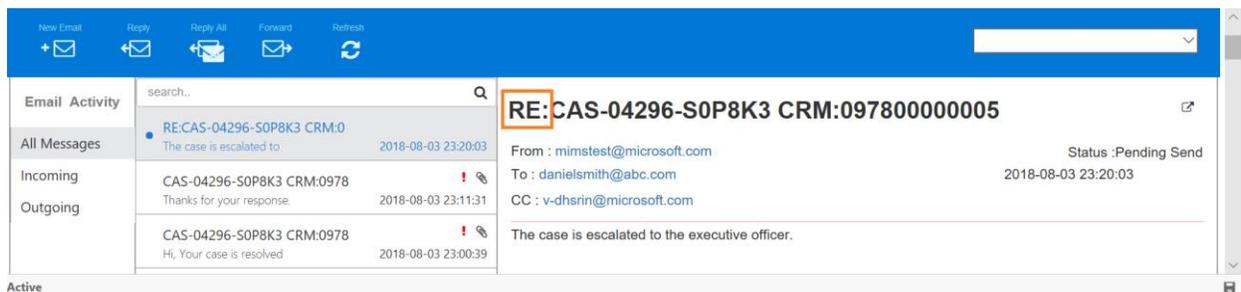
- You can also add predefined emails by clicking on Email Template and choosing the appropriate email.



- 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.

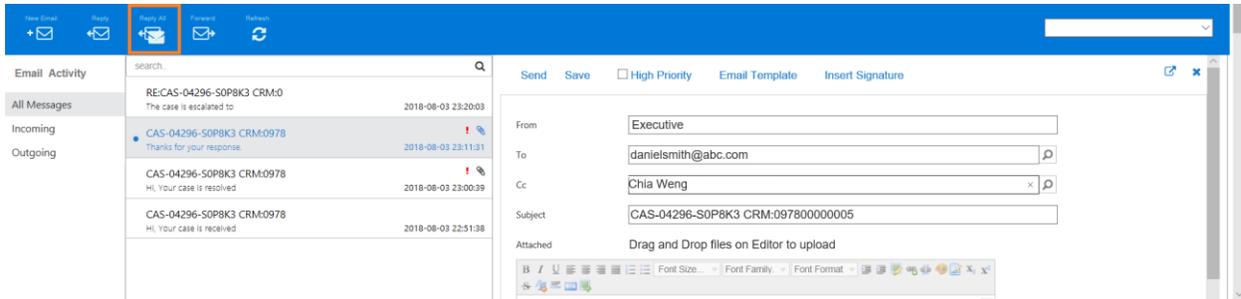


- Click on **Reply** button to reply to an Email.
 - To** address will be auto populated from the existing details and
 - Subject** is appended with **RE:** as prefix in the subject line after email is posted.

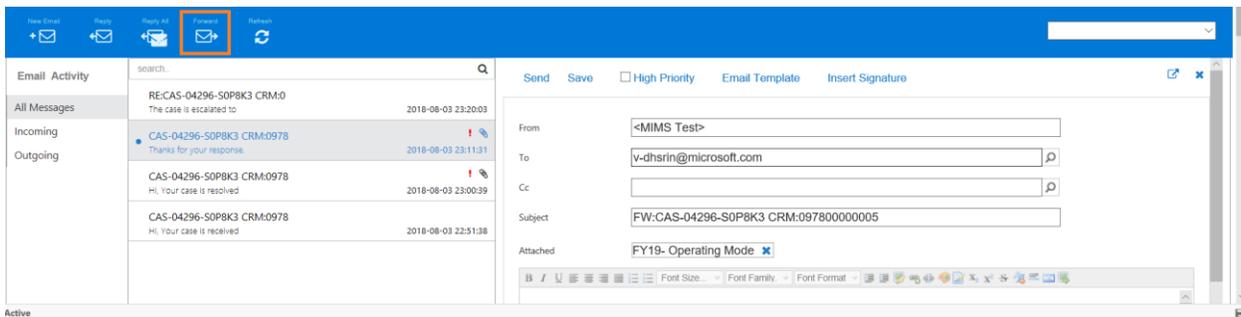


- Click on the **Reply All** button on the ribbon header to reply everyone in the Email

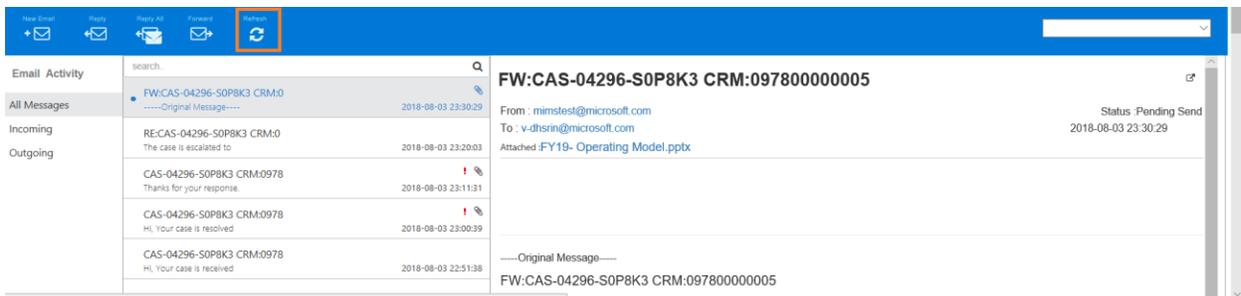
- a. To and CC are populated from the original email.
- b. Subject line is appended with RE: as prefix after post action.



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.



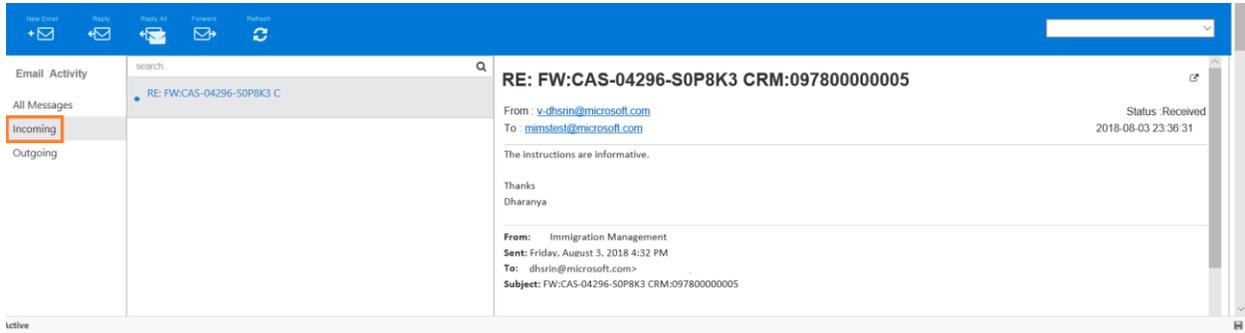
8. Click on the **Refresh** button to load or pull all the latest Emails till date. It refreshes the email activity and reloads with the latest emails.



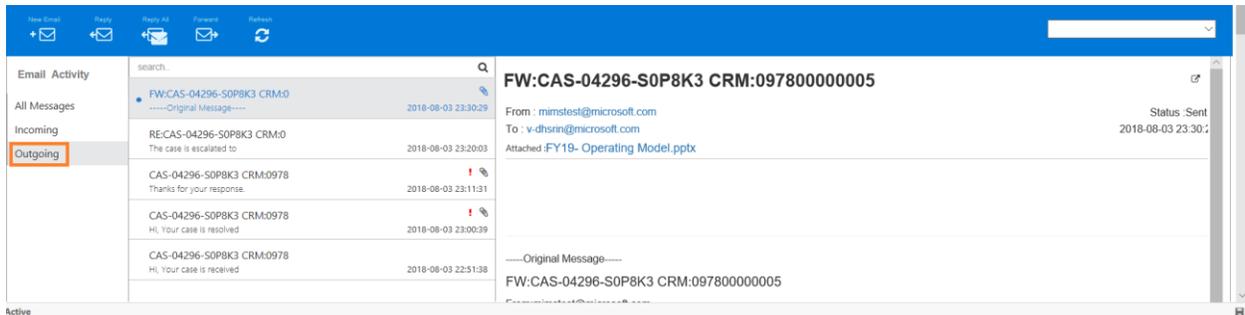
Email Views and Filters

Views

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

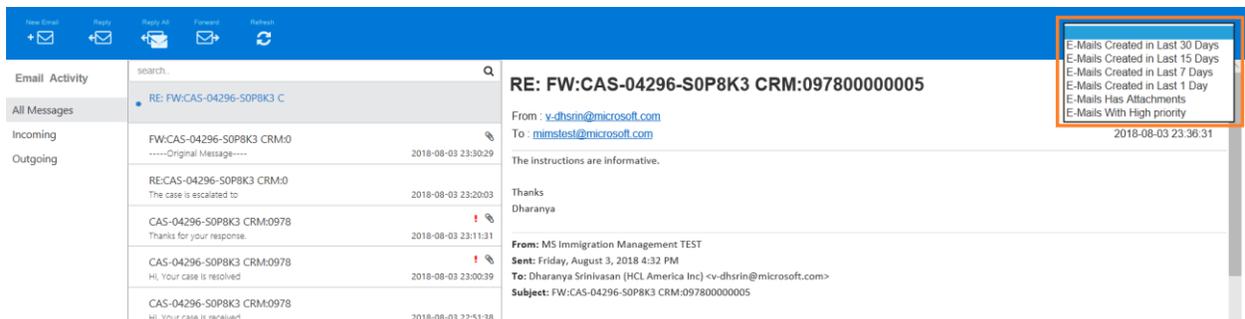


2. Click on the **Outgoing** tab on the left panel to view only the outgoing Emails.

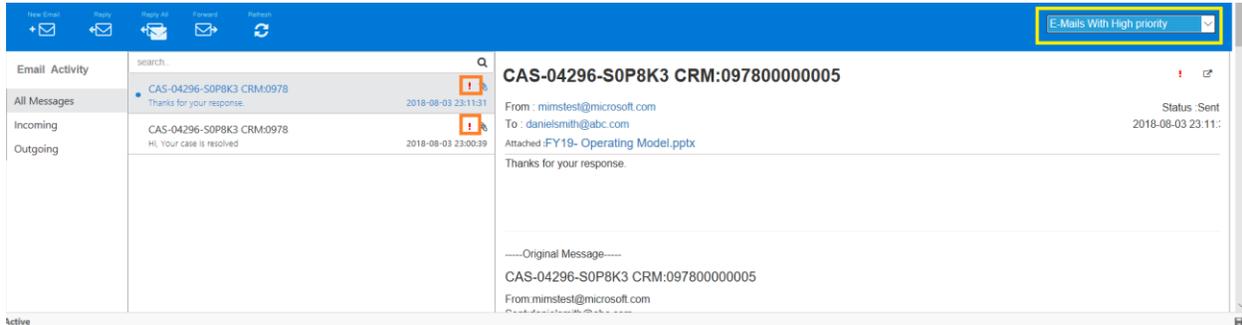


Filters

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**.

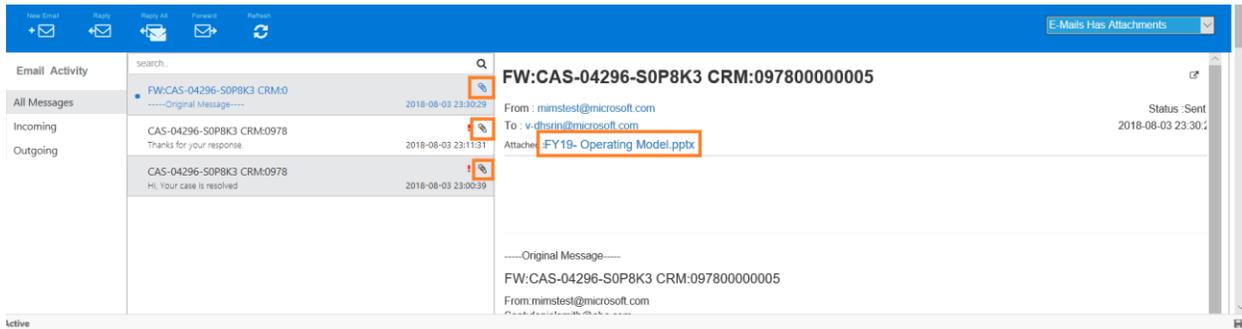


- If we select the filtering option, '**E-Mails with High Priority**', then it pulls all the Email with high priority and display them. You can also see the emails marked as high priority are tagged with a **!**.

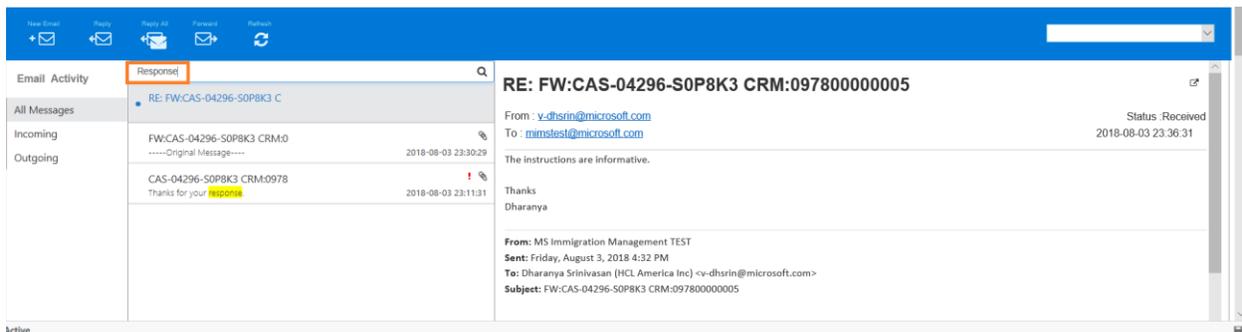


- Select the option, '**Emails created in the last 7 days**', to filter all the Emails which are created in the last 7 days. Likewise, other selections filter emails in a similar fashion.

- Select the option, '**Email has Attachments**', then it filters all the Emails which have attachments.



- 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.