

Dynamics 365 Modern Email Interface

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 in Dynamics 365 CRM providing efficient and user-friendly Email management service. It enables user to draft and manage all 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.

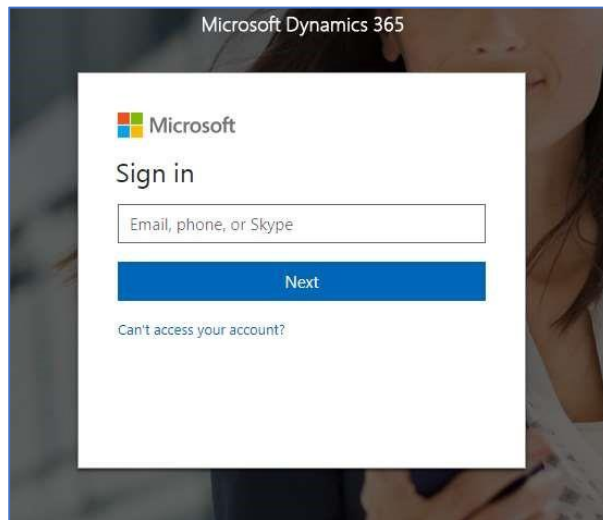
This solution, built on Dynamics 365, seamlessly works with Dynamics CRM 2016 version and later versions.

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

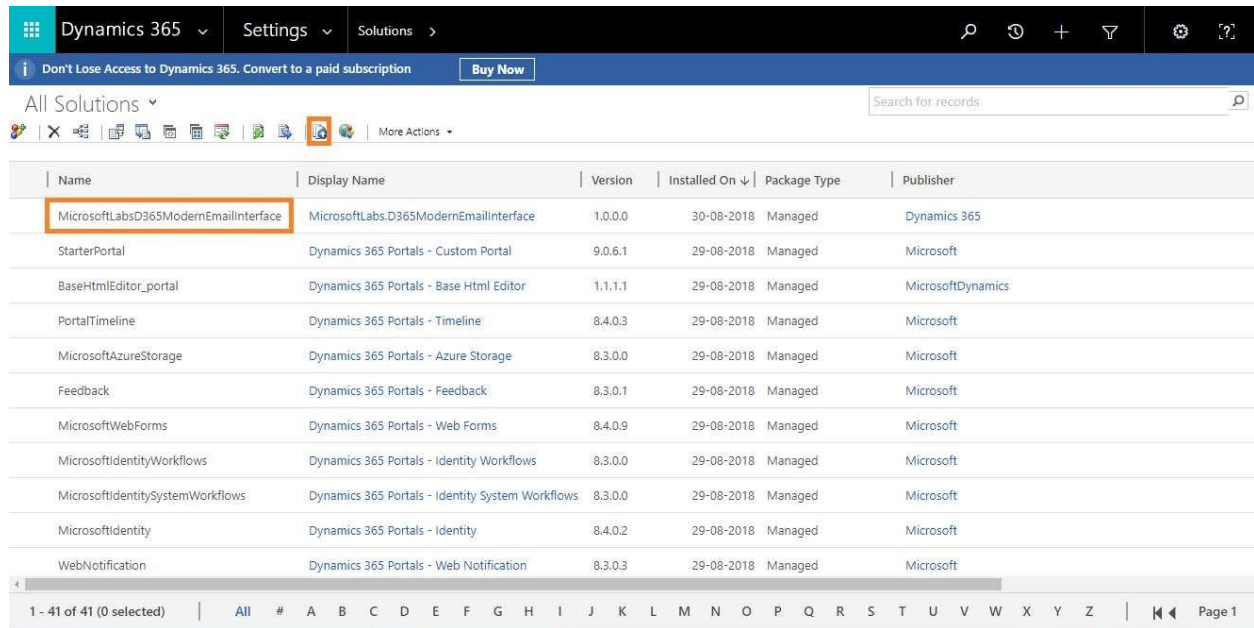
1. Log into CRM instance by giving the appropriate username and password.



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



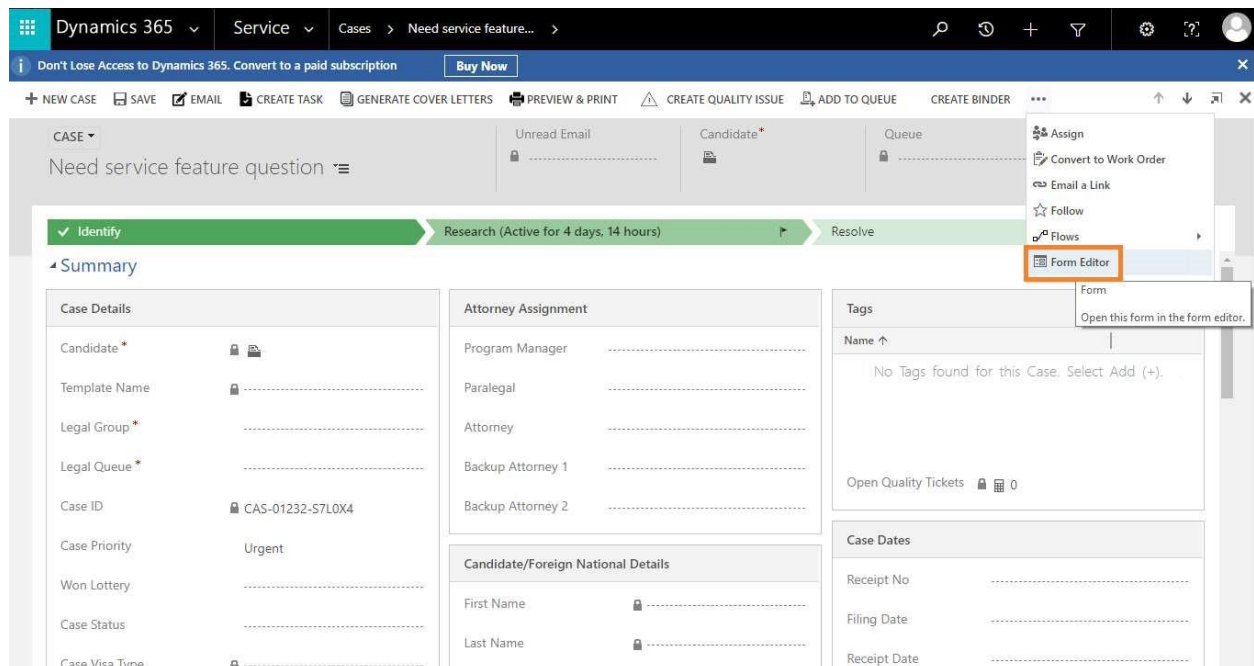
3. Now import D365 Modern Email Interface and Publish to avail the customizations.



The screenshot shows the Dynamics 365 'Solutions' list. The 'MicrosoftLabsD365ModernEmailInterface' solution is highlighted with an orange box. The table lists various solutions installed on 30-08-2018, including StarterPortal, BaseHtmlEditor_portal, PortalTimeline, MicrosoftAzureStorage, Feedback, MicrosoftWebForms, MicrosoftIdentityWorkflows, MicrosoftIdentitySystemWorkflows, MicrosoftIdentity, and WebNotification.

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

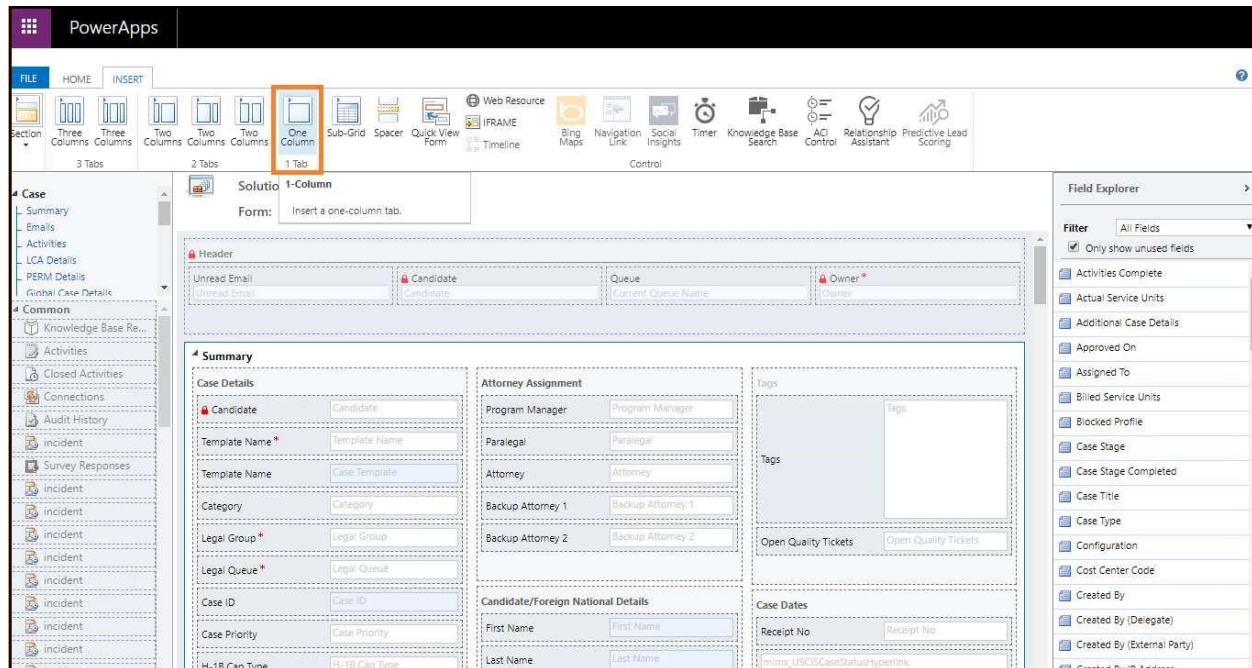
4. After successful import of the solution, go to Settings>Service> Cases (OR any activity enabled Entity) and open the form page by clicking the Form Editor button.



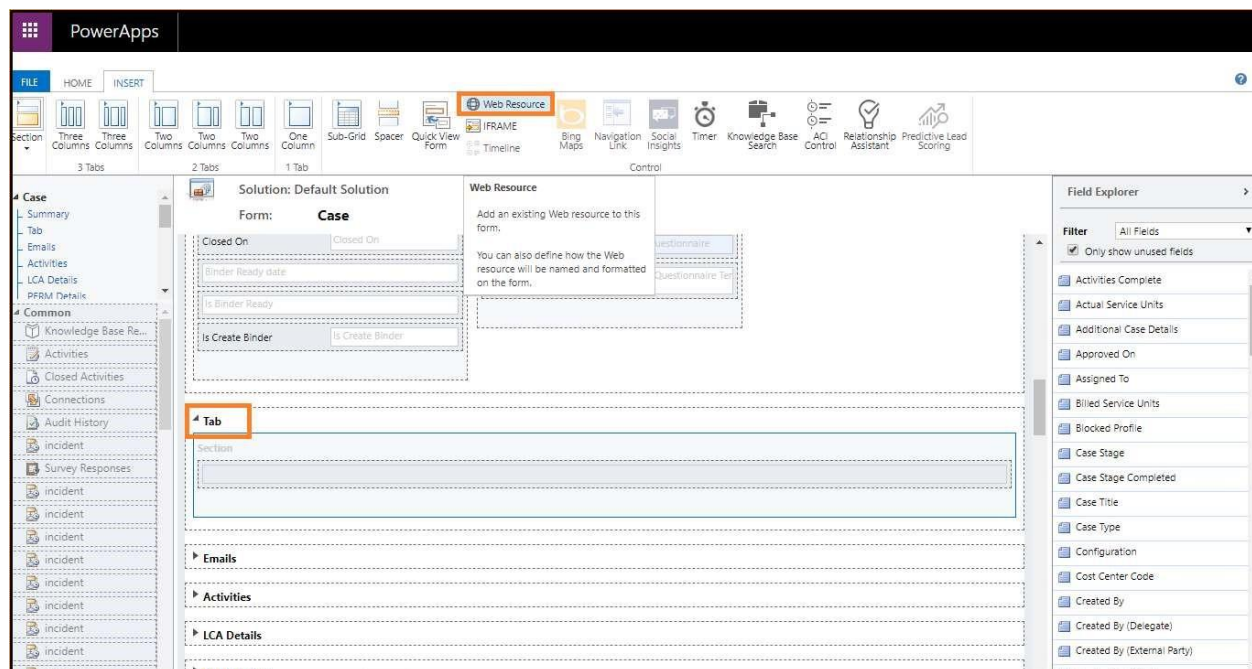
The screenshot shows the Dynamics 365 'Cases' form for a 'Need service feature question'. The 'Form Editor' button in the right-hand pane is highlighted with an orange box. The form includes sections for Case Details, Attorney Assignment, Candidate/Foreign National Details, Tags, and Case Dates.

Case Details	Attorney Assignment	Candidate/Foreign National Details	Tags	Case Dates
Candidate *	Program Manager	First Name	Name	Receipt No
Template Name	Paralegal	Last Name	No Tags found for this Case; Select Add (+).	Filing Date
Legal Group *	Attorney			Receipt Date
Legal Queue *	Backup Attorney 1			
Case ID	Backup Attorney 2			
CAS-01232-S7L0X4				
Case Priority				
Urgent				
Won Lottery				
Case Status				
Case Visa Type				

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



6. Click on the newly added one column tab and then click on the option Web Resource.



7. 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

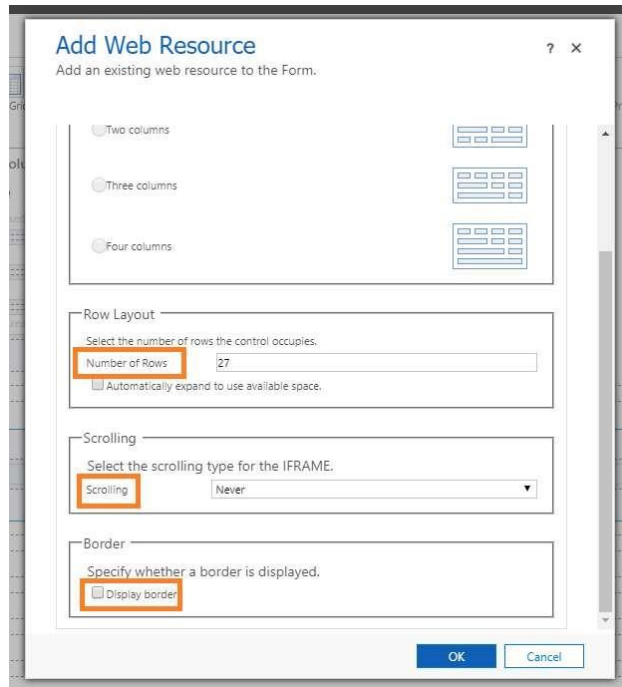
Custom Parameter(data)

☐ Restrict cross-frame scripting, where supported.

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

OK Cancel

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



Add Web Resource
Add an existing web resource to the Form.

☐ Two columns
☐ Three columns
☐ Four columns

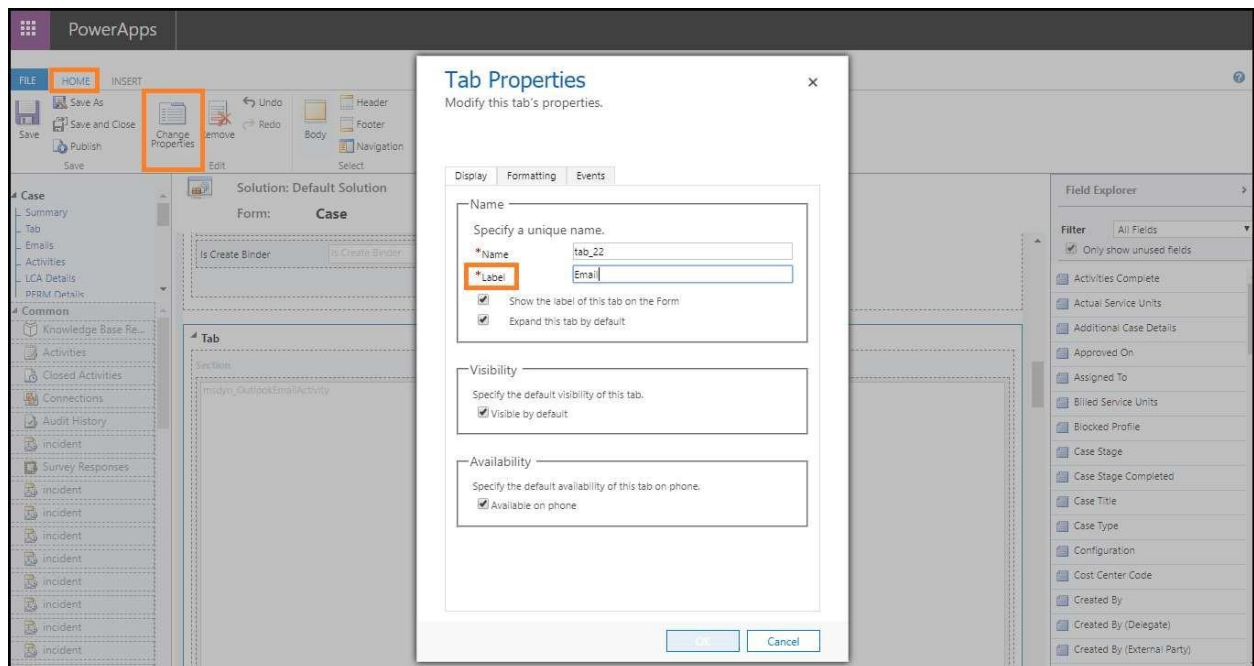
Row Layout
Select the number of rows the control occupies.
 27
☐ Automatically expand to use available space.

Scrolling
Select the scrolling type for the IFRAME.
 Never

Border
Specify whether a border is displayed.
☐ Display border

OK Cancel

- 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.



PowerApps

FILE HOME INSERT

Save Save As Save and Close Publish Save Change Properties Remove Undo Redo Header Footer Body Navigation Select

Solution: Default Solution
Form: Case

Is Create Binder Create Binder

Case

- Summary
- Tab
- Emails
- Activities
- LCA Details
- PRM Details

Common

- Knowledge Base Re...
- Activities
- Closed Activities
- Connections
- Audit History
- incident
- Survey Responses
- incident
- incident
- incident
- incident
- incident
- incident
- incident
- incident
- incident
- incident
- incident

Tab

Section

mdyn_OutlookEmailActivity

Tab Properties
Modify this tab's properties.

Display Formatting Events

Name
Specify a unique name.
 *Name tab_22
 *Label Email

☒ Show the label of this tab on the Form
☒ Expand this tab by default

Visibility
Specify the default visibility of this tab.
☒ Visible by default.

Availability
Specify the default availability of this tab on phone.
☒ Available on phone.

OK Cancel

Field Explorer

Filter All Fields

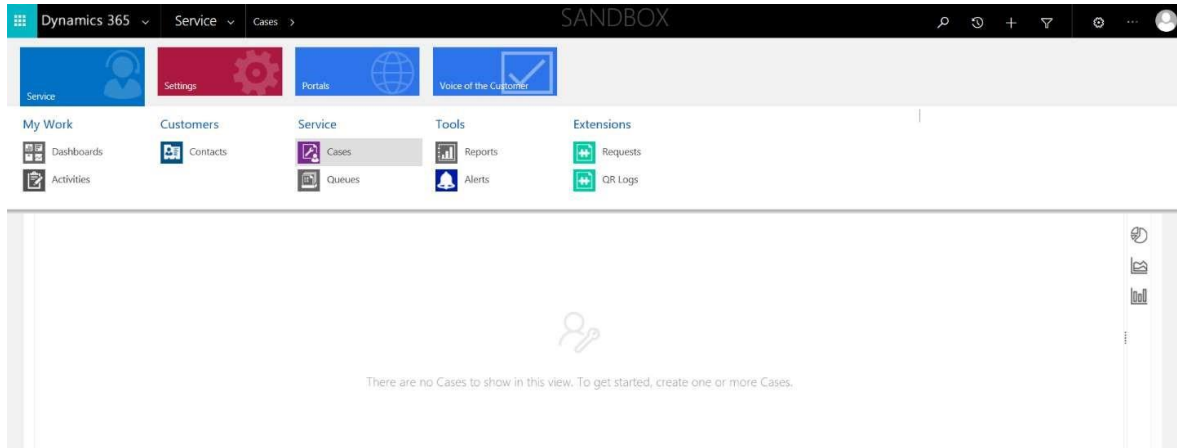
☒ Only show unused fields

- 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)

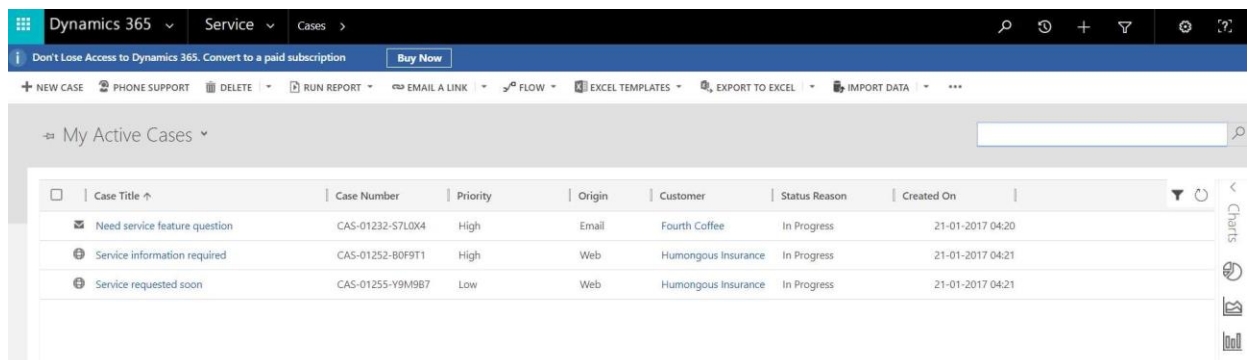
- Save and publish the form.
- Refresh the UI form in the case to see the newly created Email tab.

User Experience

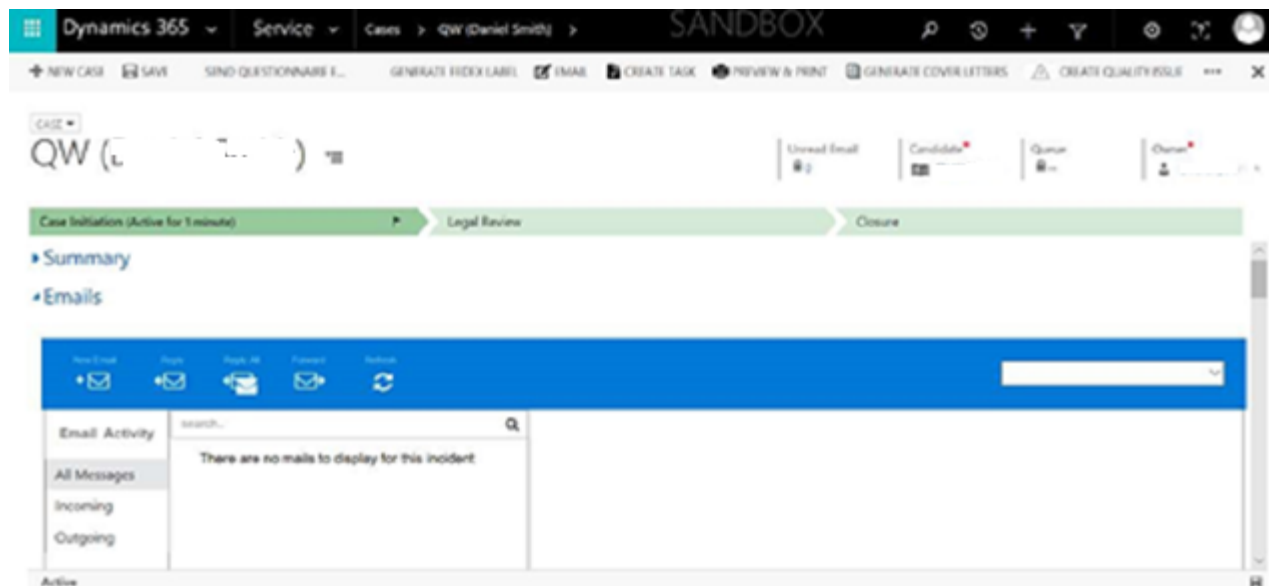
1. Navigate to Services -> Cases.



2. The Active cases view opens listing all the active cases assigned to the current user.



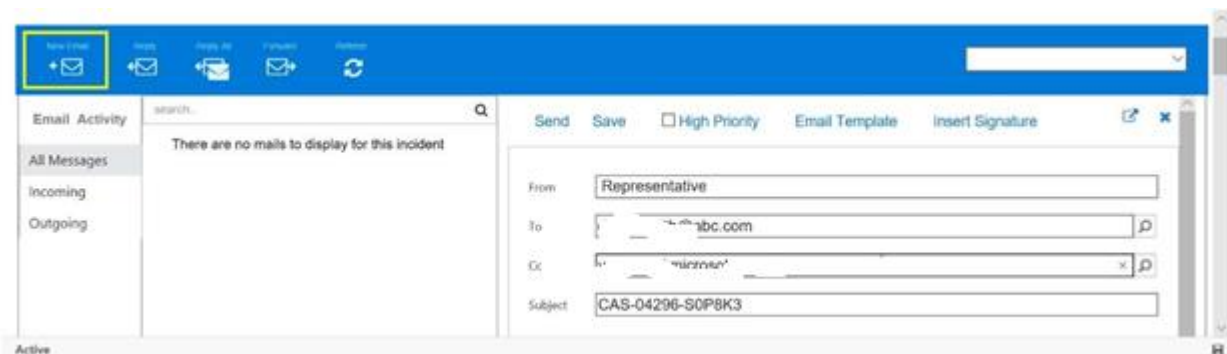
3. Double Click on any case record and we will be able to see the email management solution as a separate tab named as 'Email'.



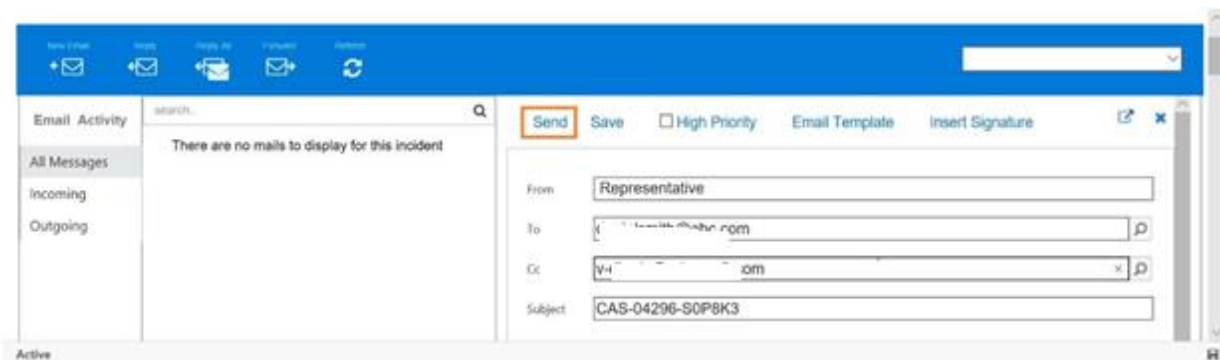
Modern Email Interface Features

Emailing options

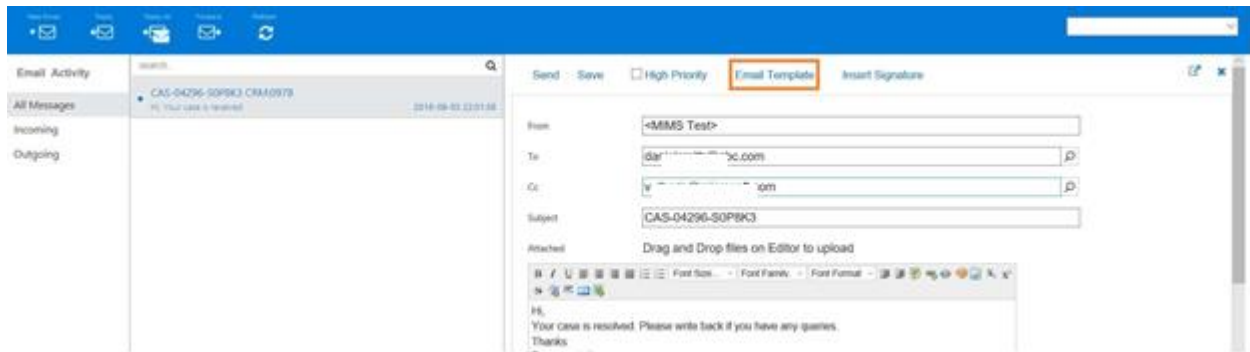
1. Click on New Email button on the ribbon header to create a new Email.



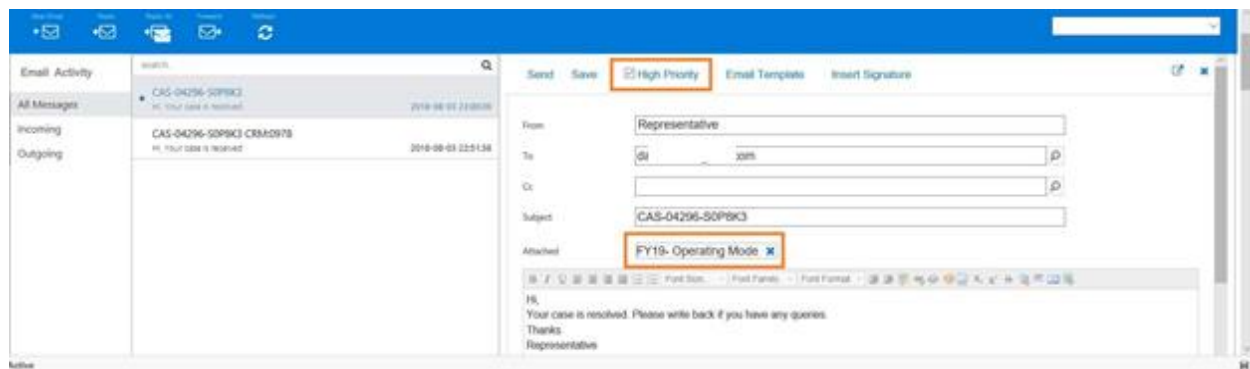
2. Draft the email, add the recipients and click on Send to send an Email.



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



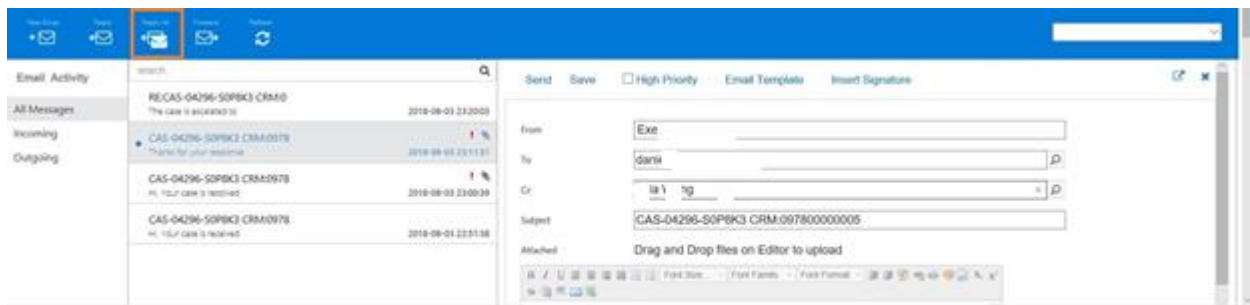
4. Drag and drop the files on the editor to upload the documents as Attachments. The priorities can be marked using the High Priority check box.



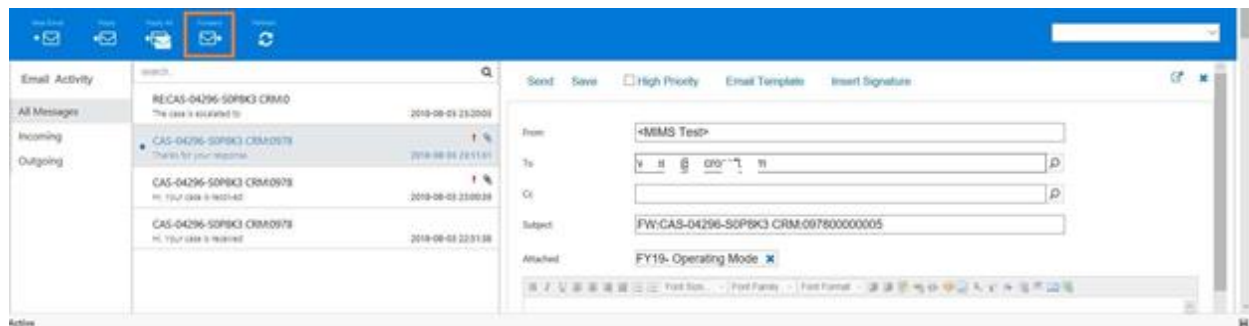
5. Click on Reply button to reply to an Email.
 - a. To address will be auto populated from the existing details and
 - b. Subject is appended with RE: as prefix in the subject line after email is posted.



6. 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.



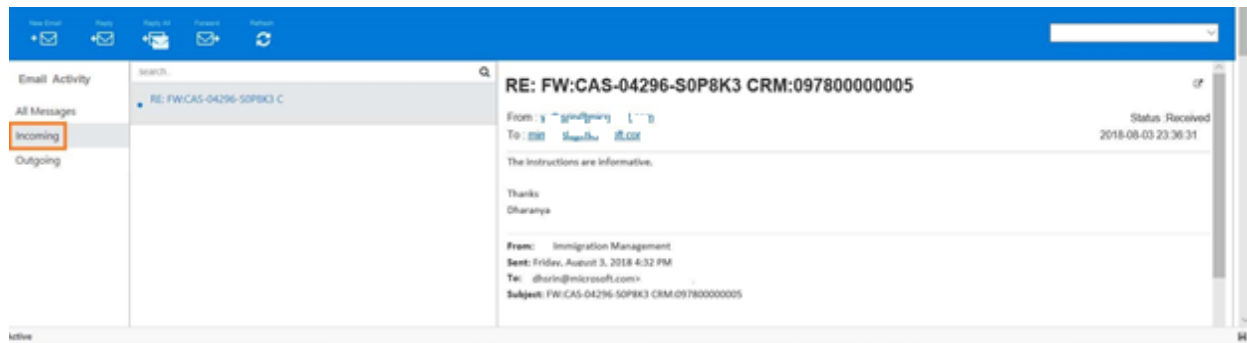
- Click on the Refresh button to load or pull all the latest Emails till date. It refreshes the email activity and reloads with the latest emails.



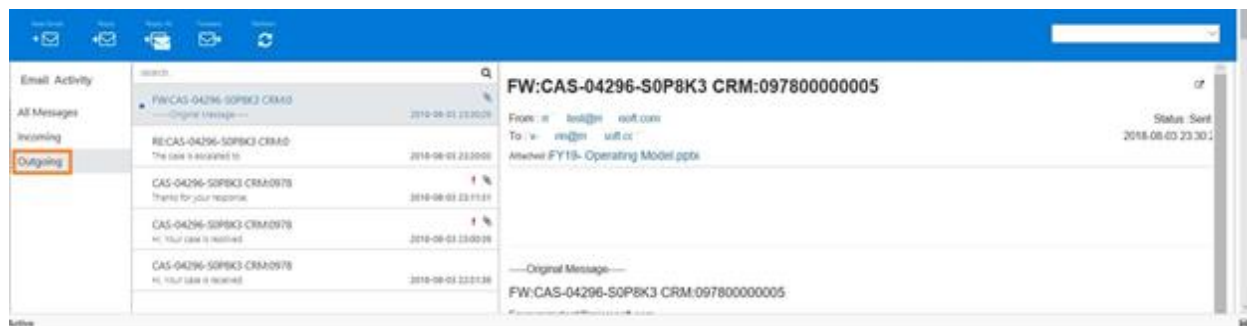
Email Views and Filters

Views

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

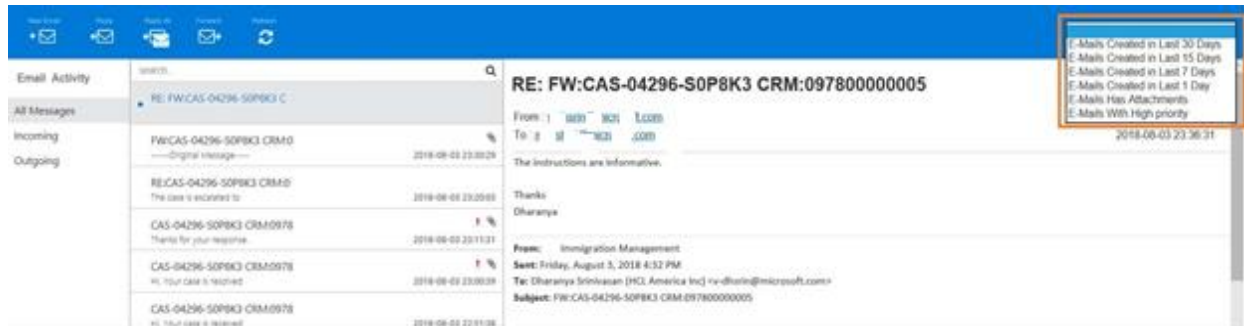


- Click on the Outgoing tab on the left panel to view only the outgoing Emails.

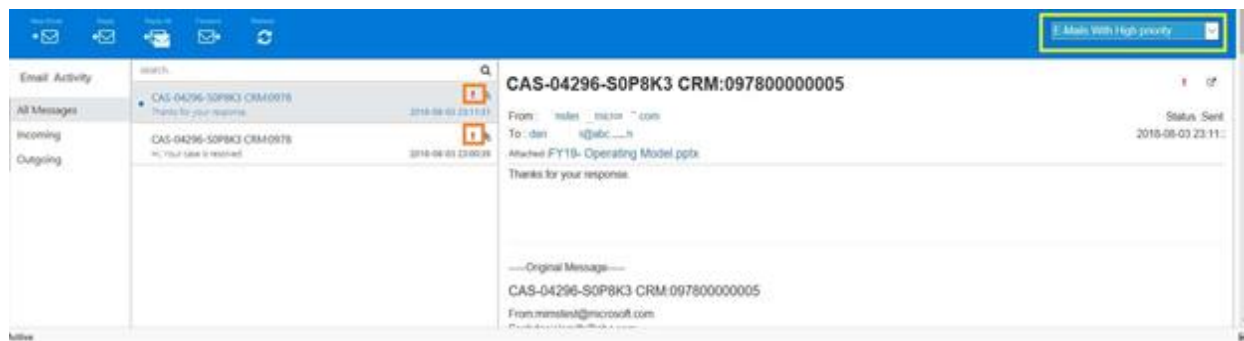


Filters

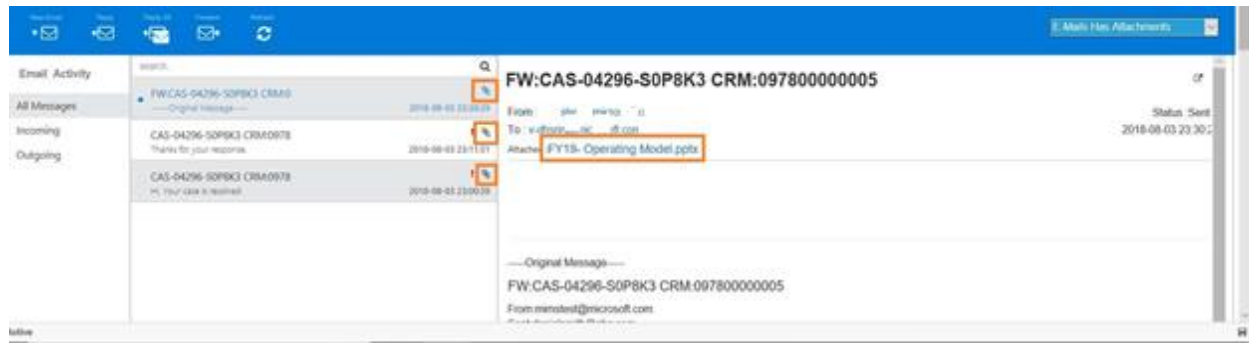
1. For filtering emails, we have an option on the top right corner of the ribbon header. The filter option provides, filtering based on timeline, priorities and added attachments.



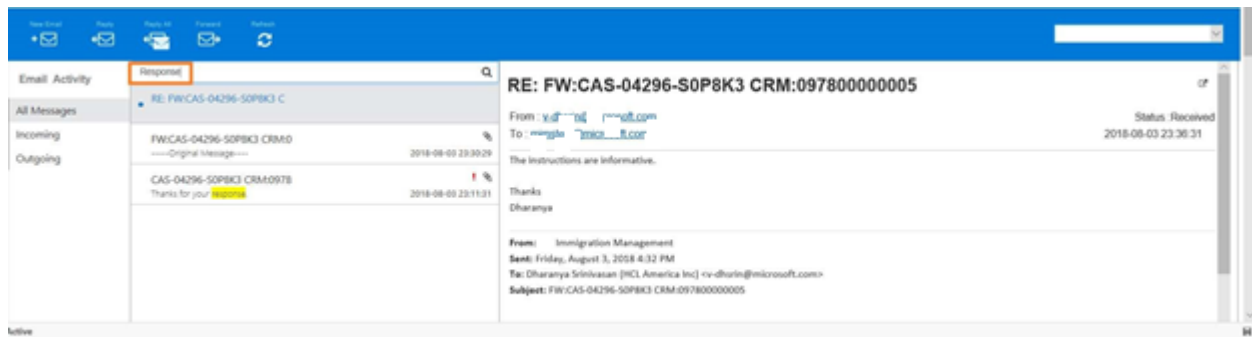
2. If we select the filtering option, 'E-Mails with High Priority', then it pulls all the Email with high priority and display them. You can also see the emails marked as high priority are tagged with a '!'.



3. 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.
4. Select the option, 'Email has Attachments', then it filters all the Emails which have attachments.



5. 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.