



Pragma Email Design

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Document Version History

#	Date	Author	Reason	Version
1	04/10/17	Pragmasys	Initial Version	0.1

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1. INTRODUCTION

Purpose of this Guide

This user manual is designed to demonstrate how a pragma email designer can be used to trigger an email to the intended person. There are some OOTB email templates that occupies a lot of MS CRM memory space and third party image hosting is required, so to reduce the CRM memory space and avoid the third-party image hosting, pragma email designer has created an azure blob storage.

It illustrates the below:

- a. Configuration of Azure
- b. Email creation and updating

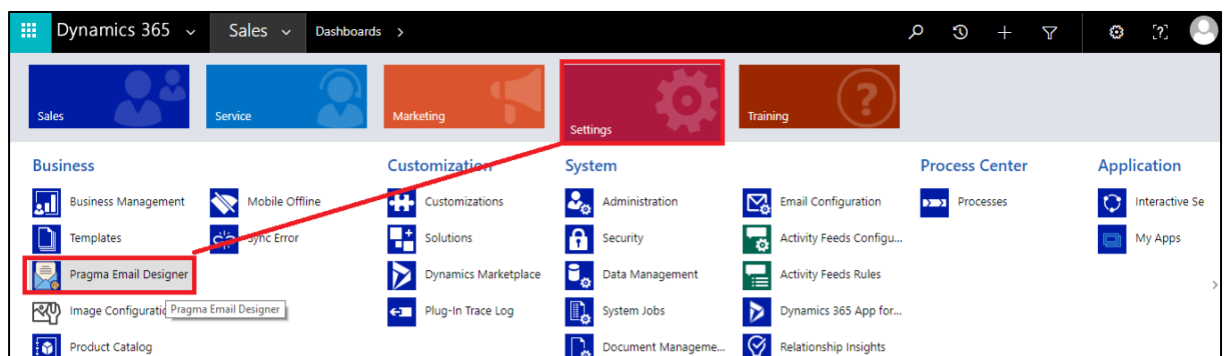
What is Azure Blob Storage?

Azure Storage is a Microsoft-managed cloud service that provides storage that is highly available, secure, durable, scalable, and redundant. Azure blob storage is used to for storing the image bytes and thereafter a uniform resource locator of the intended email is passed to it.

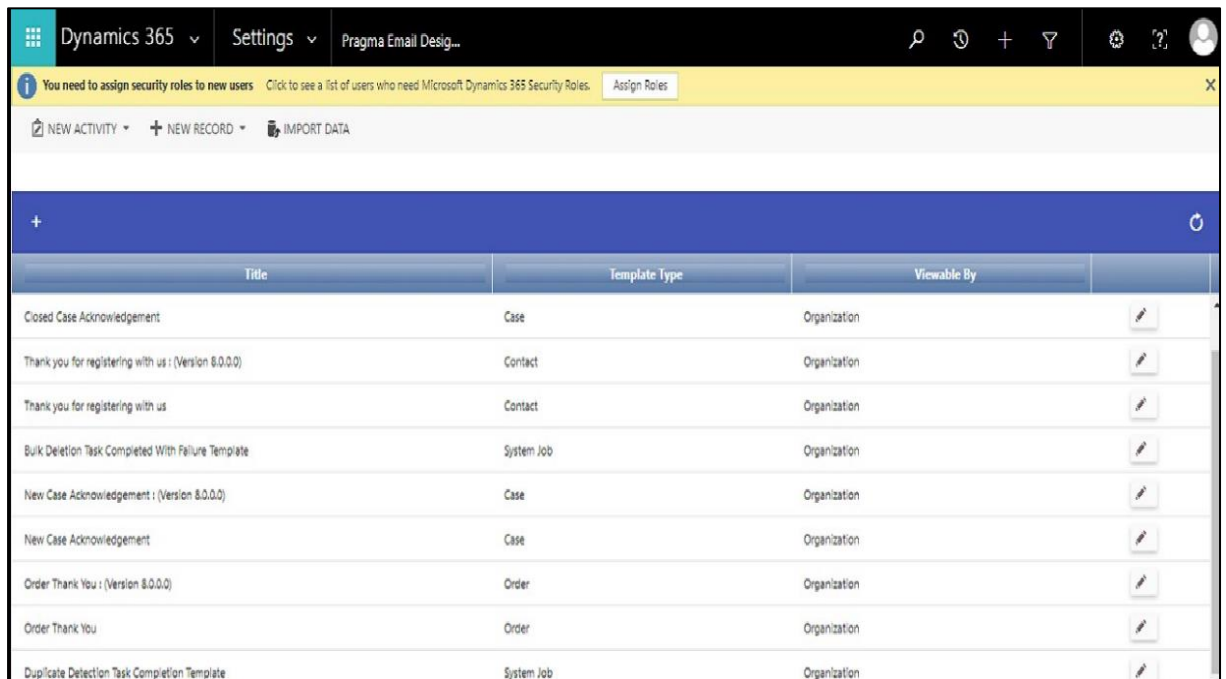
2. CREATION OF AN EMAIL TEMPLATE

Steps to follow:

- 1.) Click on Settings sitemap and click on the pragma email designer option
- 2.) Click on the '+' button to create a new template
- 3.) Select the required entity from the dropdown list and click on ok button
- 4.) Provide the title, description and subject content and save the template

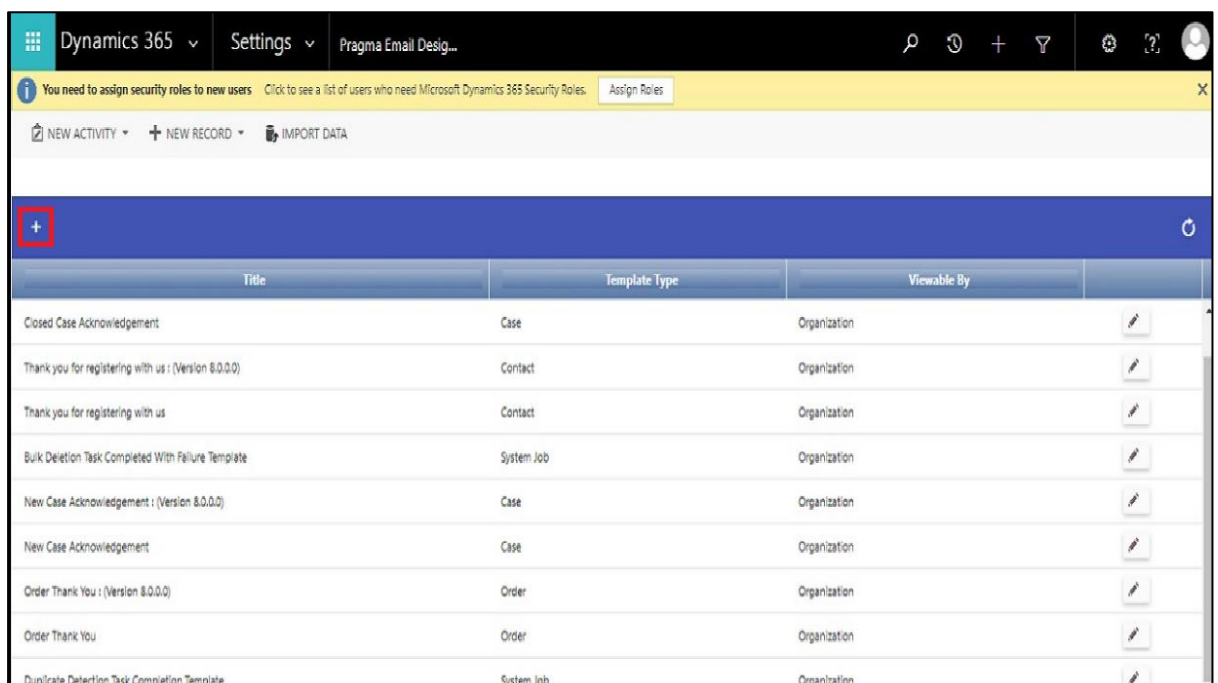


This is how the UI looks. Here all the out of box email templates are fetched.



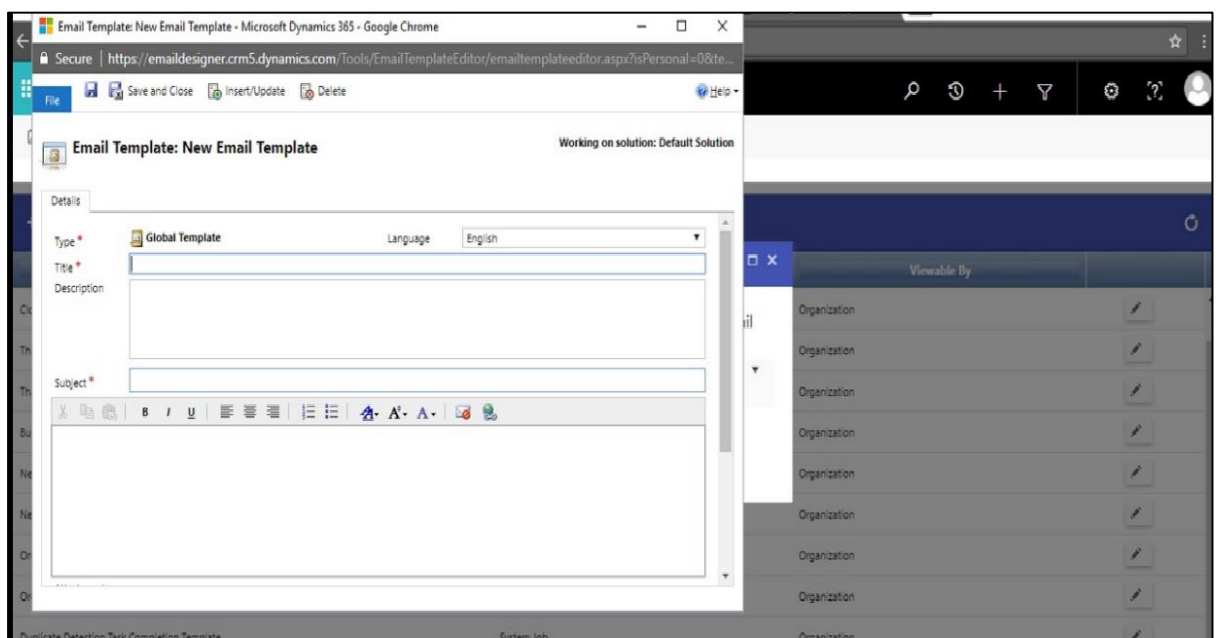
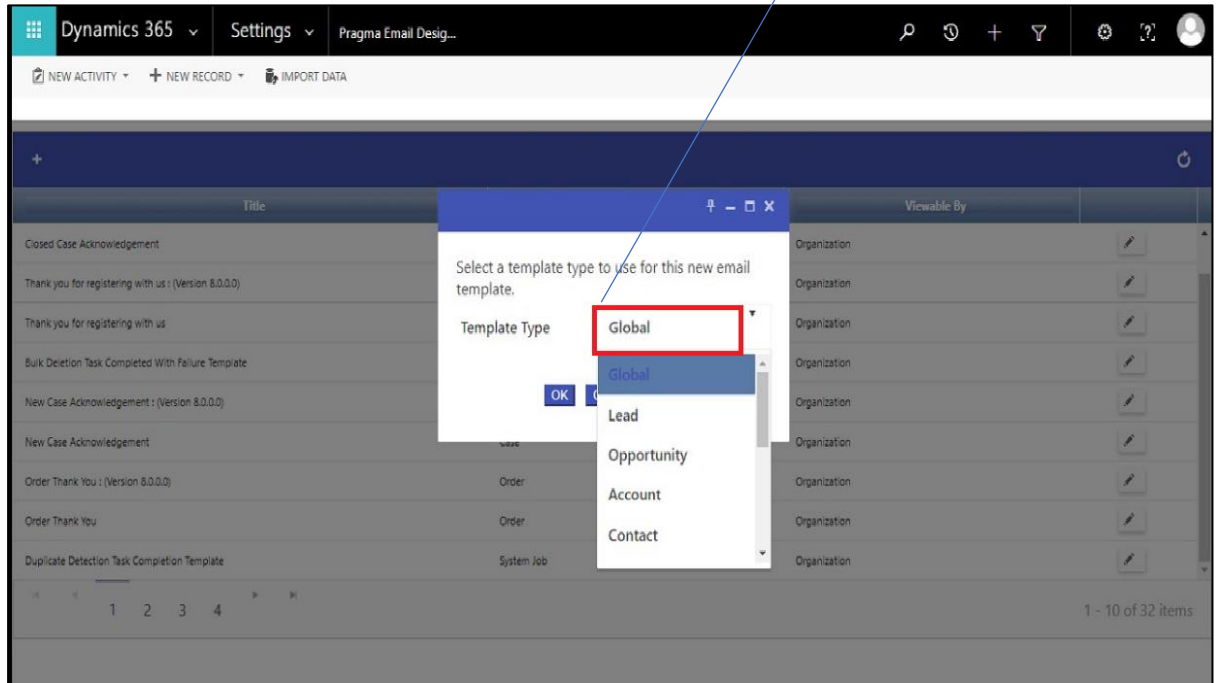
Title	Template Type	Viewable By	
Closed Case Acknowledgement	Case	Organization	
Thank you for registering with us : (Version 8.0.0.0)	Contact	Organization	
Thank you for registering with us	Contact	Organization	
Bulk Deletion Task Completed With Failure Template	System Job	Organization	
New Case Acknowledgement : (Version 8.0.0.0)	Case	Organization	
New Case Acknowledgement	Case	Organization	
Order Thank You : (Version 8.0.0.0)	Order	Organization	
Order Thank You	Order	Organization	
Duplicate Detection Task Completion Template	System Job	Organization	

Click on the '+' button



Title	Template Type	Viewable By	
Closed Case Acknowledgement	Case	Organization	
Thank you for registering with us : (Version 8.0.0.0)	Contact	Organization	
Thank you for registering with us	Contact	Organization	
Bulk Deletion Task Completed With Failure Template	System Job	Organization	
New Case Acknowledgement : (Version 8.0.0.0)	Case	Organization	
New Case Acknowledgement	Case	Organization	
Order Thank You : (Version 8.0.0.0)	Order	Organization	
Order Thank You	Order	Organization	
Duplicate Detection Task Completion Template	System Job	Organization	

List of entities



Email Template: New Email Template - Microsoft Dynamics 365 - Google Chrome

Secure | <https://emaildesigner.crm5.dynamics.com/Tools/EmailTemplateEditor/emailtemplateeditor.aspx?isPersonal=0&te...>

File Save and Close Insert/Update Delete Help

Email Template: New Email Template Working on solution: Default Solution

Details

Type * Global Template Language English

Title * Marketing Template

Description

Subject * Marketing Template

Rich text editor toolbar: Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Image, Video, Font Color, Background Color, Undo, Redo, Print, Help.

Dynamics 365 Settings Pragma Email Desig...

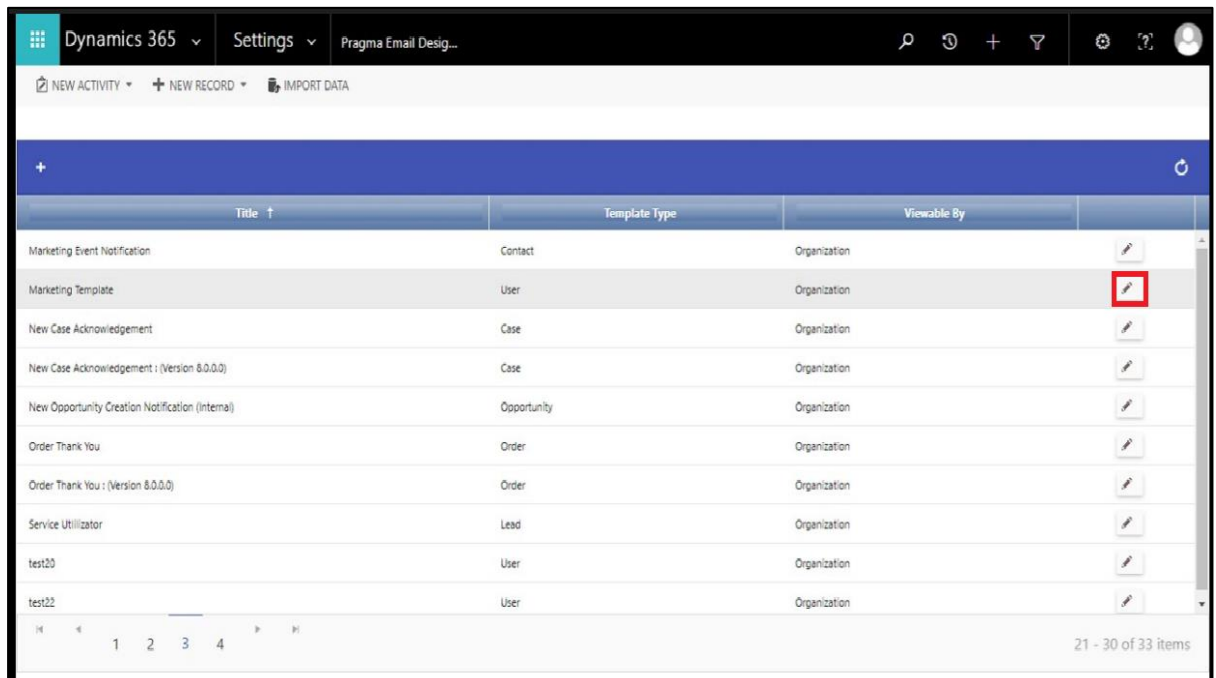
NEW ACTIVITY + NEW RECORD + IMPORT DATA











Title ↑	Template Type	Viewable By	
Marketing Event Notification	Contact	Organization	
Marketing Template	User	Organization	
New Case Acknowledgement	Case	Organization	
New Case Acknowledgement : (Version 8.0.0.0)	Case	Organization	
New Opportunity Creation Notification (Internal)	Opportunity	Organization	
Order Thank You	Order	Organization	
Order Thank You : (Version 8.0.0.0)	Order	Organization	
Service Utilizator	Lead	Organization	
test120	User	Organization	

3. UPDATION OF AN EMAIL TEMPLATE

Steps to follow:

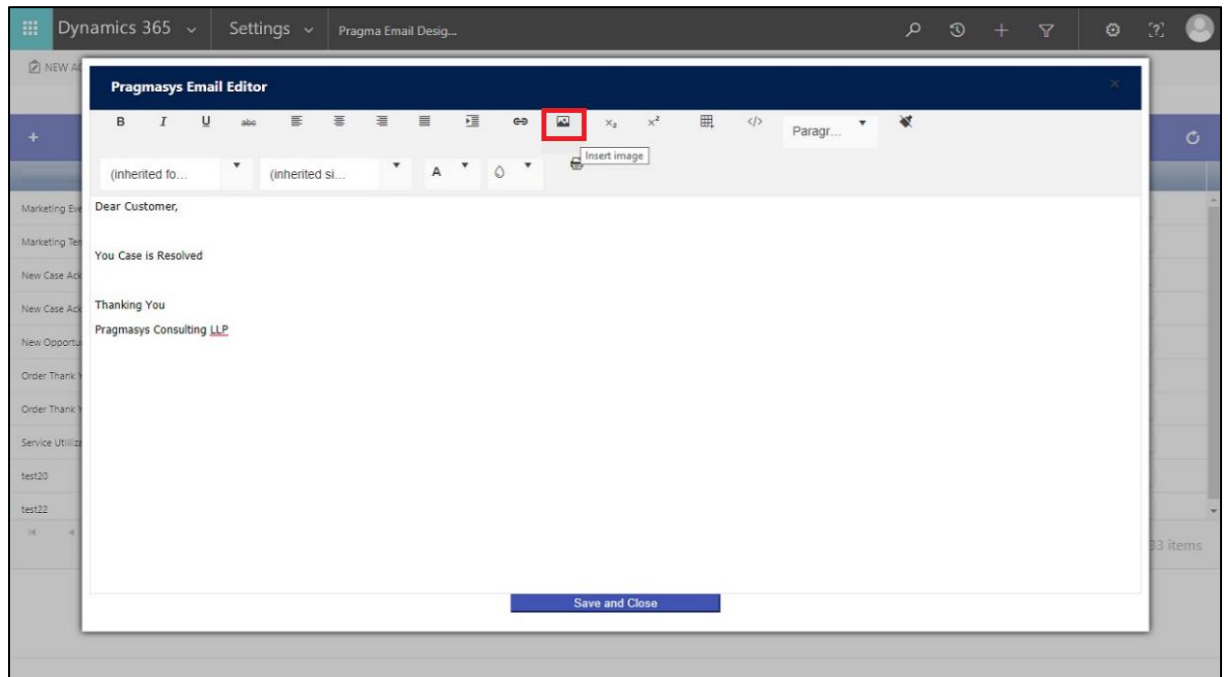
- 1.) Click on the edit icon as highlighted below of the created template to make amendments.
- 2.) Provide the updated content/add an image and click on 'save and close' button
- 3.) Click on the Ok button of the popup 'Template saved'



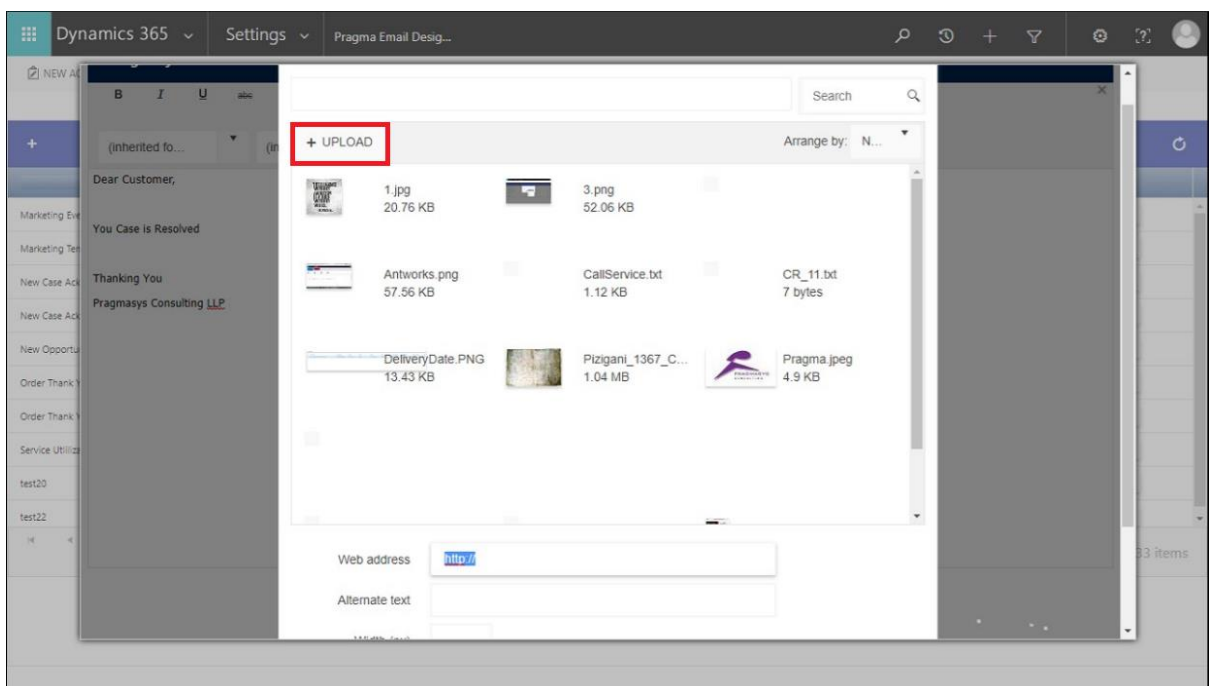
Title ↑	Template Type	Viewable By	
Marketing Event Notification	Contact	Organization	
Marketing Template	User	Organization	
New Case Acknowledgement	Case	Organization	
New Case Acknowledgement : (Version 8.0.0.0)	Case	Organization	
New Opportunity Creation Notification (Internal)	Opportunity	Organization	
Order Thank You	Order	Organization	
Order Thank You : (Version 8.0.0.0)	Order	Organization	
Service Utilizator	Lead	Organization	
test20	User	Organization	
test22	User	Organization	

21 - 30 of 33 items

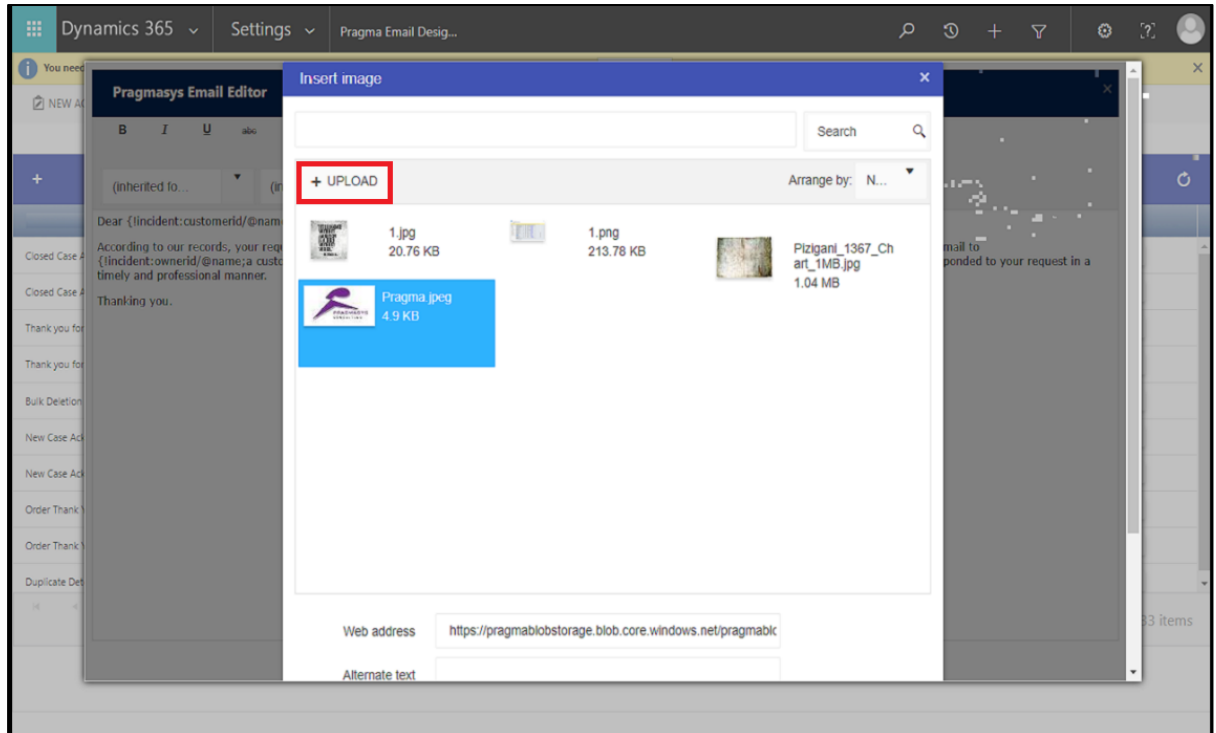
The body part of the email template is updated and an image can be added to the template if required. Click on the insert image icon as highlighted below.



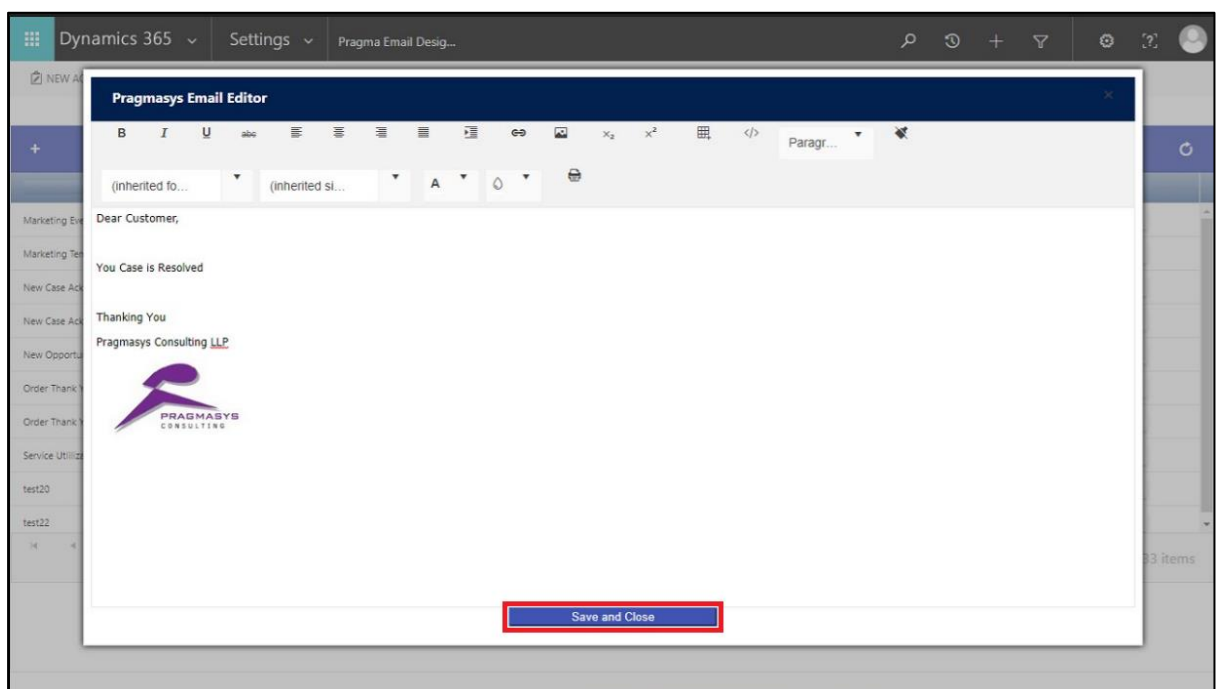
User can even upload an image from the +UPLOAD button available



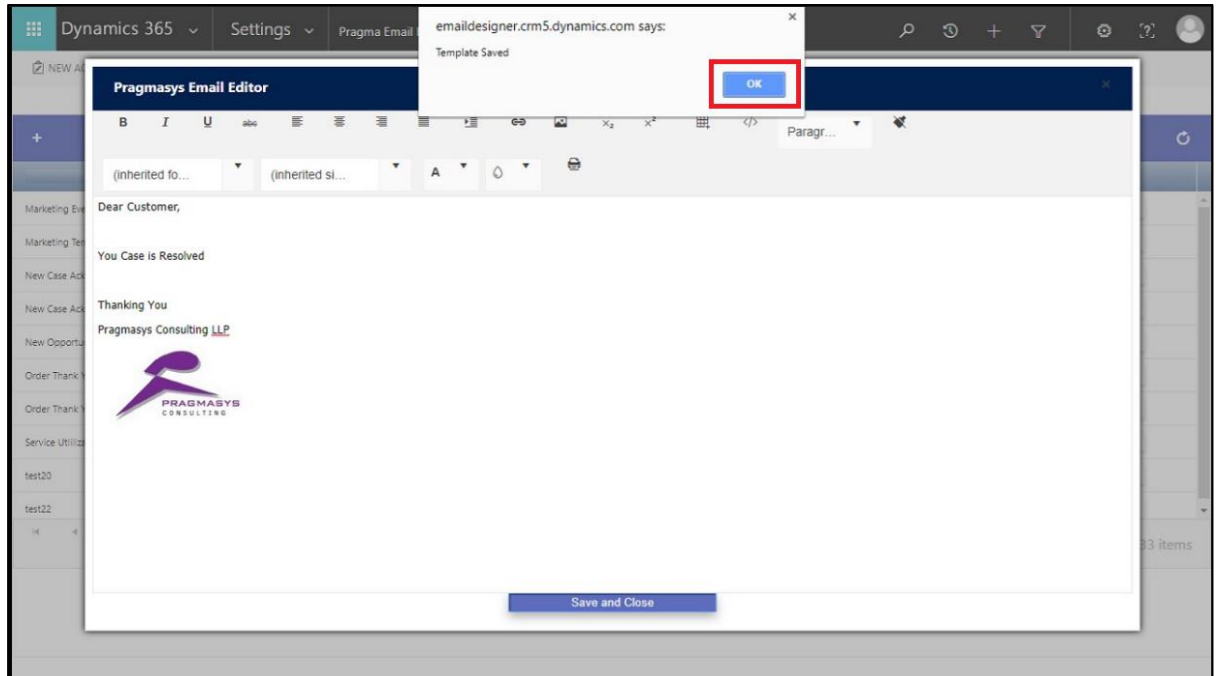
Select the image and insert the image into the email template



Click on save and close button



Click on Ok button



4. FEATURES OF PRAGMA EMAIL DESIGN TEMPLATE

Below are the features of this designed email template:

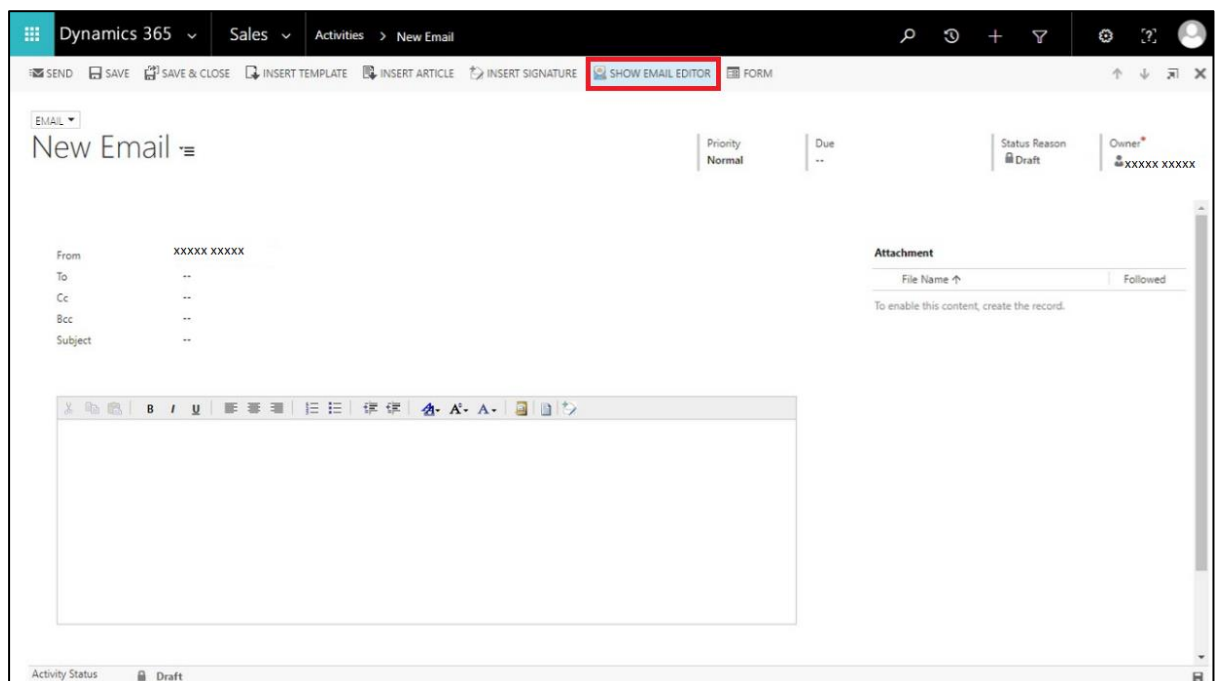
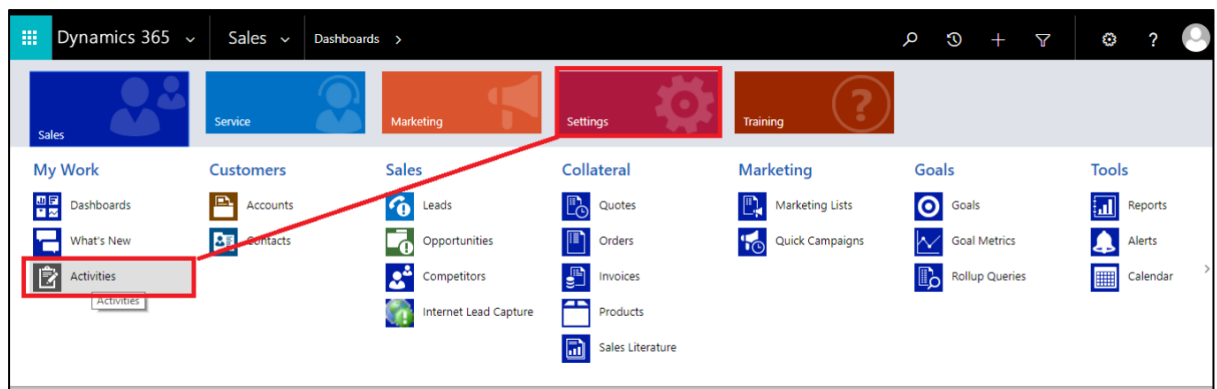
- There is no need of external server for image hosting i.e. only one time setup is required
- Blob(Cloud) platform is available for all time
- Easy to configure Azure Connection in Azure Configuration Entity
 - a. Storage Key
 - b. Storage Account
 - c. Container Name
 - d. Blob Path
- Easy to configure Azure Connection in Azure Configuration Entity
- Easy to check the attachment in the Azure Cloud by clicking on the view attachment button on an entity.
- This gives a good look and feel to the user interface.

5. Rich HTML design using Email form

User can even design a Rich HTML content in email from email form

Steps to follow:

- 1.) Click on Settings → Activities
- 2.) Click on Email → Show Email Editor



Dynamics 365
Sales
Activities > New Email

SEND
SAVE
SAVE & CLOSE
INSERT TEMPLATE
INSERT ARTICLE
INSERT SIGNATURE
HIDE EMAIL EDITOR
FORM

EMAIL
New Email

Priority: Normal
Due: --
Status Reason: Draft
Owner: XXXXX XXXXX

From: XXXXX XXXXX
To: --
Cc: --
Bcc: --
Subject: --

Attachment

File Name	Followed
To enable this content, create the record.	

Pragmasys Email Editor

B
I
U
abc
[Text Alignment Icons]
[Link Icon]
[Image Icon]
x₂
x²
[Table Icon]
</>

Format
(inherited fo...)
(inherited sl...)
A
[Color Picker]
[Image Icon]

[Large Text Area]

Activity Status: Draft