



# **Global Preview for Microsoft Dynamics CRM**

## User Manual

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## Overview

Welcome to the Akvelon Global Preview User Manual. With this guide, you can learn how to install, configure, and use Akvelon Global Preview for Microsoft Dynamics CRM.

Global Preview for Microsoft CRM is a custom module which includes two features:

- Email Preview
- Preview Pane

### Email Preview provides the ability to:

- ✓ View email contents and attachments without opening the emails.
- ✓ Search for emails by subject, body, and regarding fields.
- ✓ Organize emails multiple ways to increase efficiency.
- ✓ Perform certain actions with your emails: Add to Queue, Set Regarding, Assign to, and others, right from the Email Preview window.

Preview Pane allows you to view detailed information for any activity in one click, without opening any additional windows, and also to configure the preview pane in the way you like.

### Preview Pane provides the ability to:

- ✓ View the content of any entity with one touch including custom entities.
- ✓ View entity attributes and Notes.
- ✓ Preview open and closed entities for selected contacts, accounts, or any other entity.
- ✓ Preview open and closed entities for custom entities.
- ✓ Select entities and entity attributes to preview.

## Licensing

Whether you are using Microsoft Dynamics CRM in your production, development, or test environment, you always need licenses.

Each organization requires its own license for Global Preview. In a typical setup you have one single organization and only need one license. The license contains the organization name and you can only install the license on the organization with the specified name.

If you use multiple organizations, each organization requires a separate Global Preview license. However, you only need licenses for the organizations using Global Preview. If you have a single CRM server with four organizations and you want to use Global Preview in two of them, then you need two licenses.

Each organization license (except the trial one) contains a restricted number of client user licenses (CAL). Each user of an organization that uses Global Preview must have a valid license. If an organization has 100 users and 50 users have permissions to perform searches using Global Preview (see the **Global Preview Users Permissions** section), you need at least 50 Global Preview licenses, otherwise you will receive a license validation error.

When adding new users to CRM, be sure to verify that Global Preview also has corresponding licenses for those new users.

To request Global Preview licenses please contact [gs.support@akvelon.com](mailto:gs.support@akvelon.com).

# Installation

## Upgrading from previous version

To upgrade Global Preview you need to completely remove your current version of Global Preview:

1. CRM Settings → Global Preview Settings
2. Click the "About" button → Deactivate
3. Remove Global Preview using Programs and Features (Control Panel → Programs and Features).

**Note:** Before upgrading your CRM 2011 UR11 and older to a newer version (CRM 2011 UR12 and newer or CRM 2013) - you should update your current version of Global Preview to 1.0.3. Please see detailed instruction [HERE](#).

To upgrade you need to completely remove your current version of Global Preview (see Uninstall Global Preview section) and import new version of Global Preview (see Installation section below).

To upgrade from previous versions of Global Preview, download new version from [avocado.software.com](http://avocado.software.com) site and install it (NO NEED TO REMOVE previous version). During installation, select **the Maintain customizations (recommended)**, and check the "**Activate any processes and enable SDK messages...**" (see Global Preview Installation section for more details).

Contact [gs.support@akvelon.com](mailto:gs.support@akvelon.com) for more details and if you need assistance with upgrading Global Preview.

## Global Preview Installation

To set up Akvelon Global Preview on Microsoft Dynamics CRM, follow these steps:

1. Download Akvelon Global Preview by the following link: <http://avocado.software.com/global-preview/>
2. Log on to your Microsoft Dynamics CRM server using an account that has administrative privileges (System Administrator).
3. Allow pop-up windows in your web browser for CRM website:
  - Internet Explorer: <http://windows.microsoft.com/en-us/internet-explorer/ie-security-privacy-settings>
  - Google Chrome: <https://support.google.com/chrome/answer/95472?hl=en>
  - Mozilla Firefox: <https://support.mozilla.org/en-US/kb/pop-blocker-settings-exceptions-troubleshooting>
4. Go to **CRM Settings → Solutions**
5. Click the **Import** button (see Figure 1)

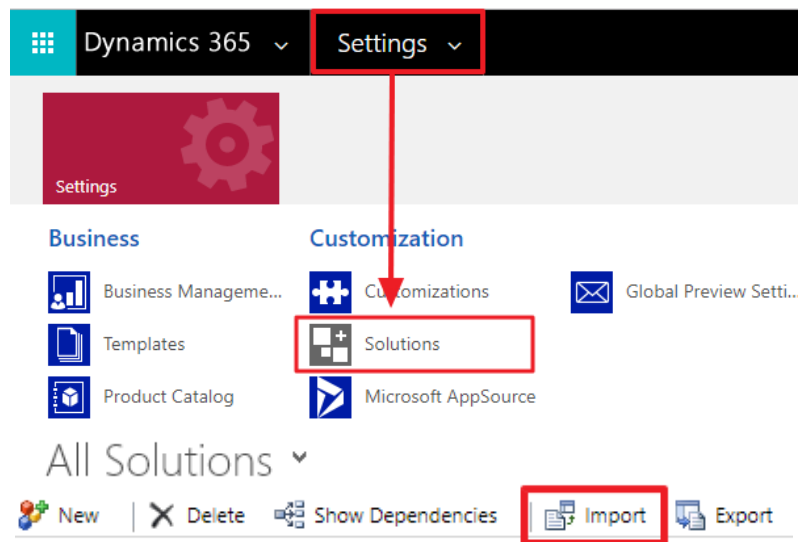


Figure 1 Import Global Preview Solution

6. Follow the Import Wizard.
  - 6.1. Click the **Choose File** button and select the path to Global Preview .zip file and click the **Next** button (see Figure 2).

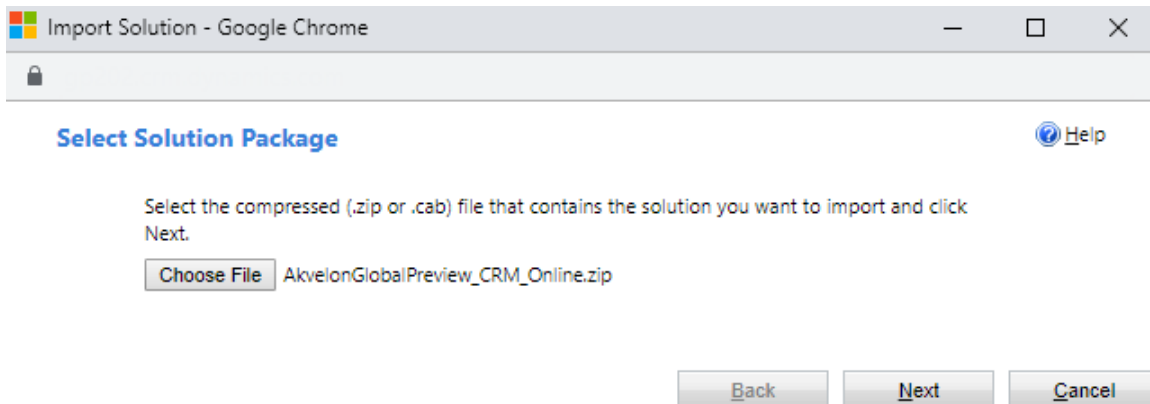


Figure 2 Select the Global Preview solution

- 6.2. Click the **Next** button again.
  - 6.3. Check the **"Enable any SDK message processing steps included in the solutions"** checkbox and click the **Import** button (see Figure 3)

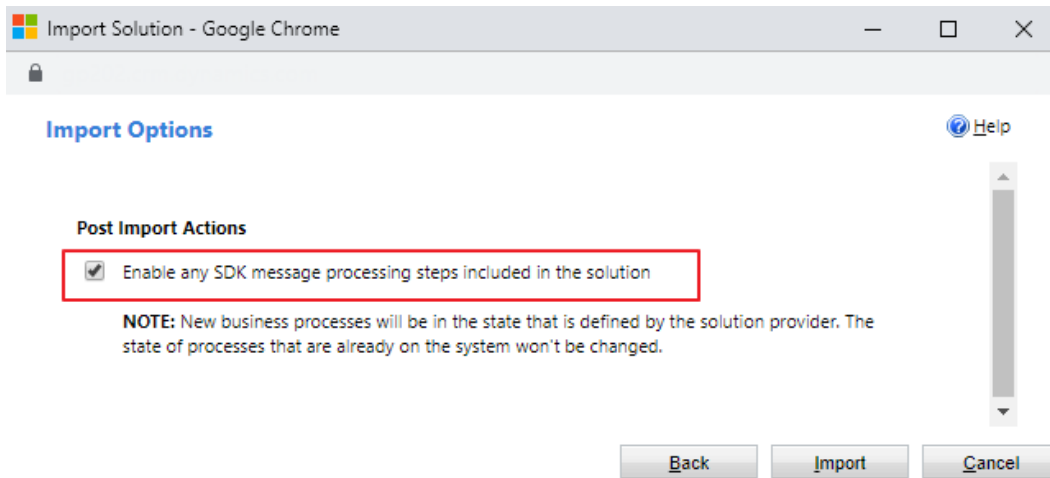


Figure 3 Activate any processes and enable SDK message

- 6.4. Click **Next** and wait while the solution is installed
- 6.5. Click the **Close** button
7. Refresh the browser page using Ctrl+F5.
8. After installation, Global Preview should be activated (see Activation section for more details).
9. Give search rights to users (see Global Preview Users Permissions section)

## Activation

Activate Global Preview separately for each organization.

Before activation, **make sure that pop-ups are not blocked by your internet browser for your CRM site.**

To activate Global Preview for an organization, go to **Settings** → **Global Preview Settings** and click the **About** button at the upper right corner (see Figure 4).

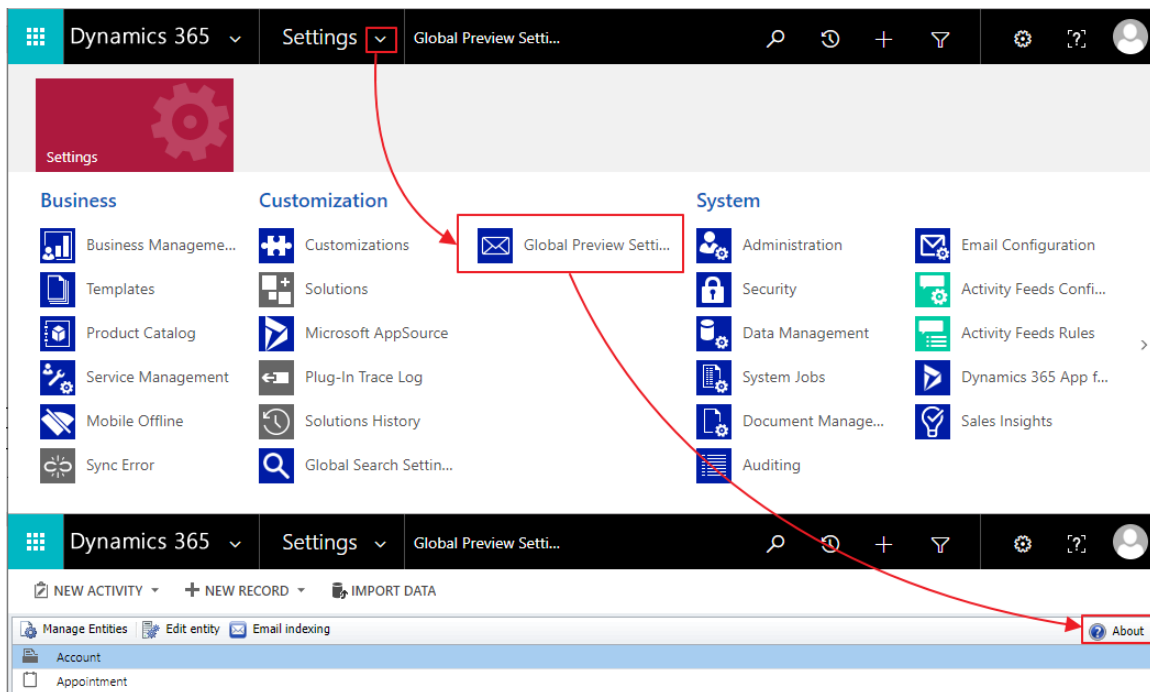


Figure 4 About button

You will see the **End User License Agreement**, please read and accept it using the checkbox, then click the **Activate** button. Input your Global Preview license into the open license window and click the **Update license** button (see Figure 5).

After you click Ok, a message indicating that Global Preview is activated will appear. Now you can use Global Preview.

### Please note:

1. You can get the free 14-day trial version of Global Preview from [avocado.software.com](https://avocado.software.com).
2. Visit [avocado.software.com](https://avocado.software.com) or contact [gs.support@akvelon.com](mailto:gs.support@akvelon.com) to purchase Akvelon Global Preview for Microsoft Dynamics CRM.



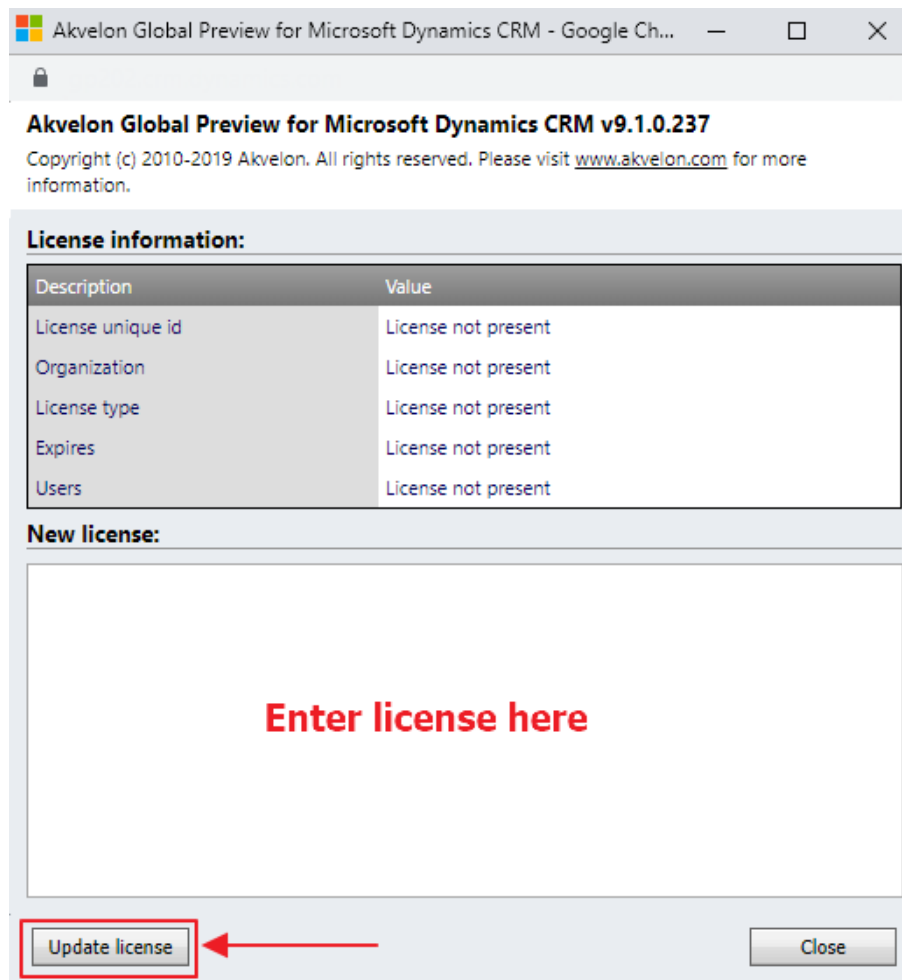


Figure 5 License window

## Updating License Data

If you need to update license data (e.g. to input commercial license instead of trial, update number of users, prolong your commercial license or enable search in attachment contents feature) go to **Settings → Global Preview Settings** and click the **About** button at the upper right-hand corner. Then click the **Update license** button, put the new license data into the license textbox (see Figure 6) and click the **Update license** button.

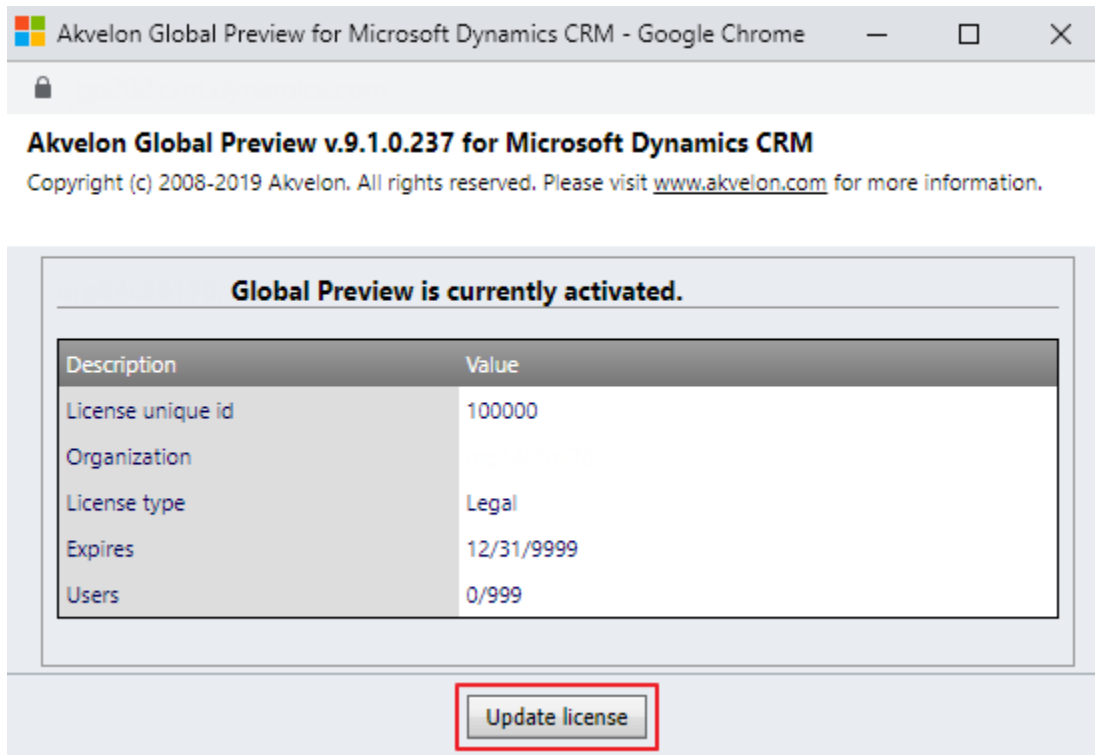


Figure 6 License Information window

## Uninstall Global Preview

To uninstall Global Preview, please follow these steps:

1. Go to **Settings** → **Solutions** page
2. Check the **AkvelonGlobalPreview** checkbox and click the **Delete** button (see Figure 7)

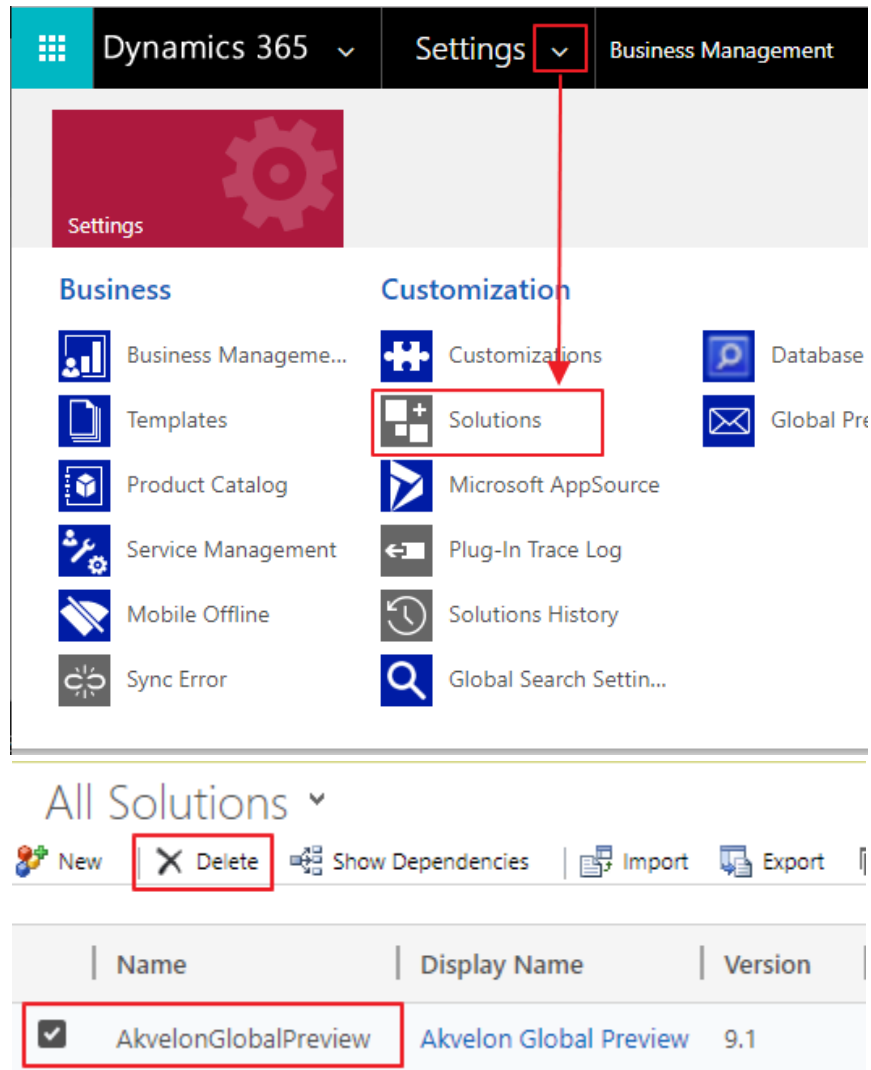


Figure 7 Uninstall Global Preview

3. Click **OK** in the confirmation dialog and wait until Akvelon Global Preview is removed (see Figure 8)

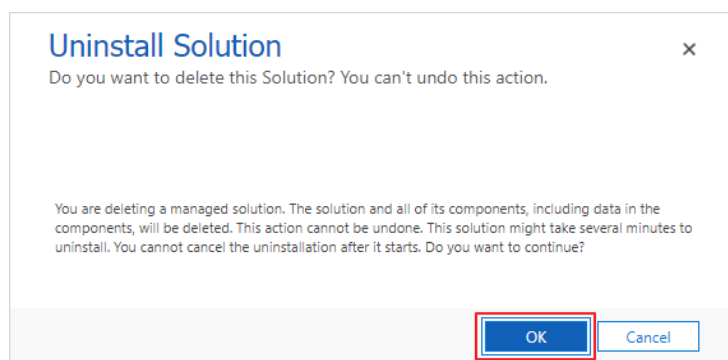


Figure 8 Confirm Deletion dialog

## Akvelon Email Preview

To use Email Preview, go to Site Map OR Workplace and click on the **Email Preview** icon (see Figure 9).

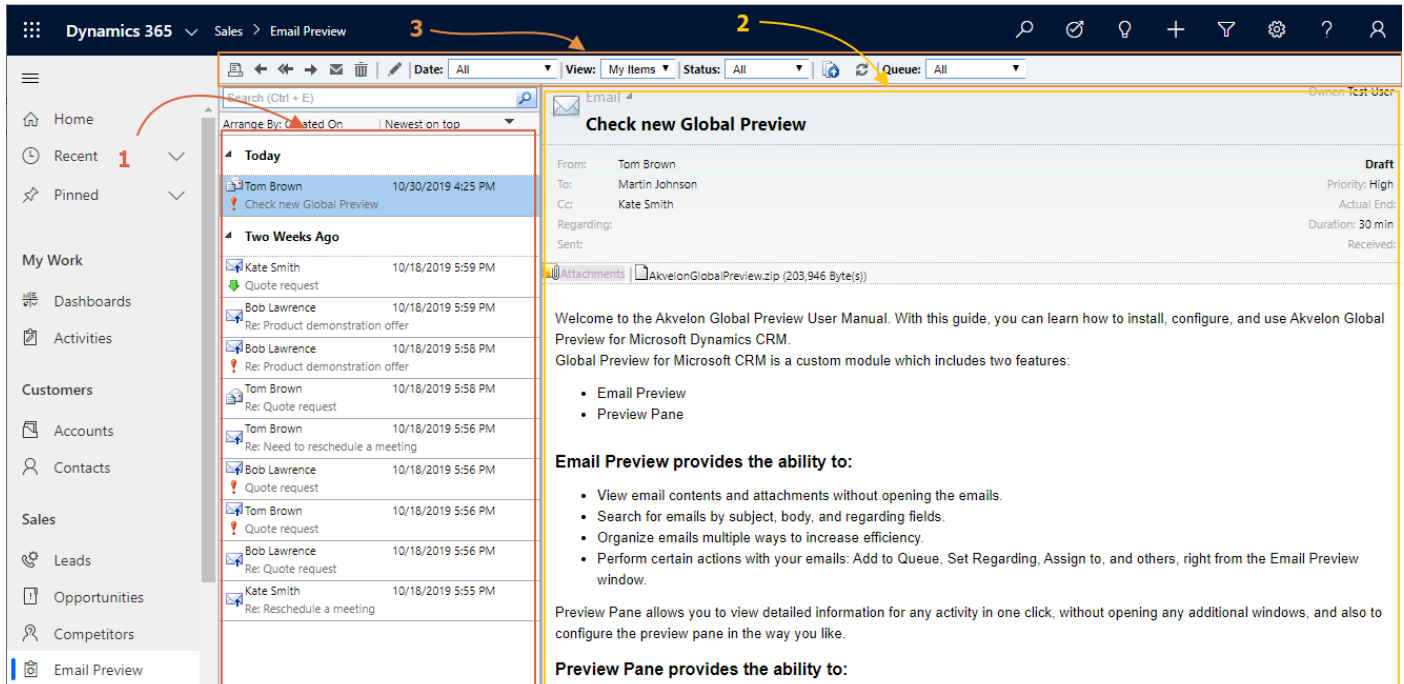


Figure 9 Email Preview in the CRM navigation Panel

The Email Preview window includes the following areas

1. List of emails
2. Preview pane
3. Tool bar

### List of Emails

This displays the list of emails created in the system. When an email is selected in the list, its body is displayed in the Preview pane. The pane's header includes information about email properties (subject, to, cc, status, date of creation, priority) and a list of files attached. To open an attachment, just click on it.

Email Preview displays 50 emails per page by default. If there are more than 50 emails, Email Preview will spread the emails out on separate pages. To navigate through them, click on the page links provided (see Figure 10). Users can change the number of emails displayed; to do that just click on the **Show** dropdown list at the bottom and select any of three options: 30, 50, or 100 emails per page.

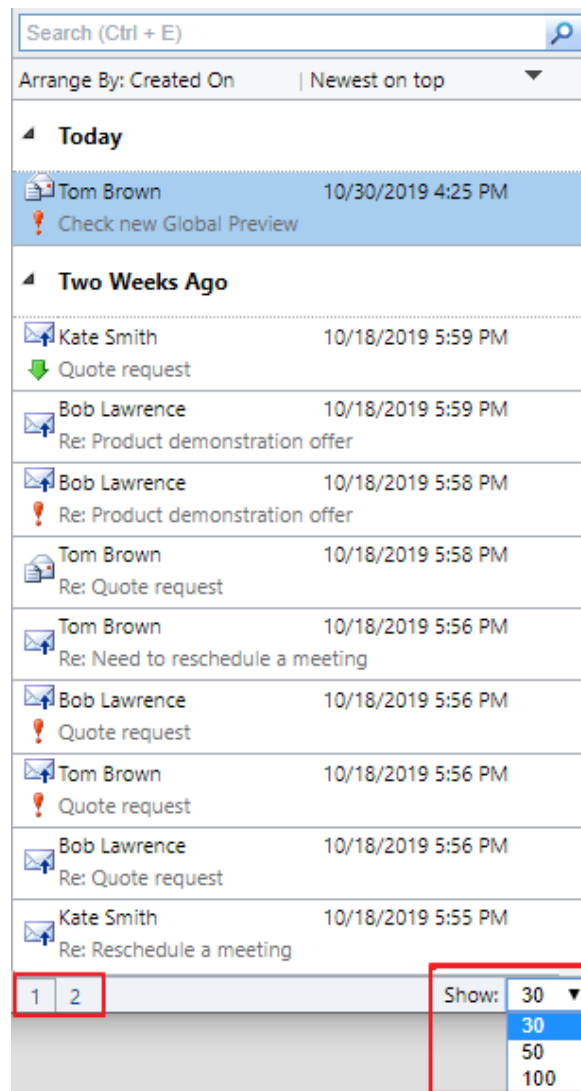


Figure 10 List of Emails

## Arranging Emails

### Sorting

By default Email Preview sorts emails by relevance, with the most relevant emails listed on top. To sort by a different condition, select a sorting condition by clicking on the **Arrange By** button and then select a sort order by clicking on the button to the right.

You can sort emails by one of the following conditions: From, To, Subject, Regarding, Scheduled Start, Scheduled End, Created On, Actual Start, Actual End, Priority, Status.

### Filtering

Email Preview allows users to narrow the number of emails in the **List of Emails** using filters.

The following filters are available (see Figure 11):

Filter Name	Description
<b>Date</b>	Allows users to view emails created within a specified date range.
<b>View</b>	Depending on the option selected, allows users to work with all emails ("All Items" option) or emails created by the current user only ("My Items" option).
<b>Status</b>	Allows users to view only emails with the specified status.

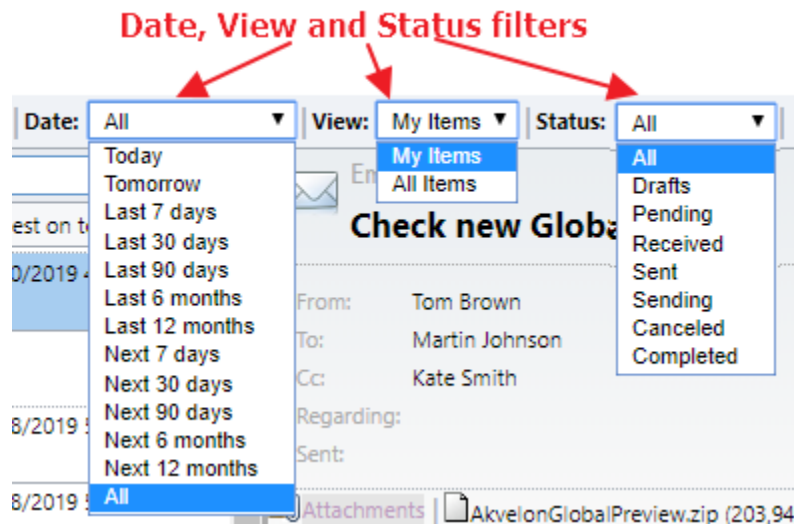





Figure 11 Filters

For example, if you want to view emails which you created today and have not sent yet, select Date = **"Today"**, View = **"My Items"**, Status = **"Draft"**. Emails which match the filters will be displayed in the **List of Emails**.

**Please note:** Filters can be used together with search.

## Tool Bar Functionality

The Tool Bar allows you to perform the following actions:

Action	Icon	Description
<b>Print</b>		Select <b>Print</b> to print your email. Information about email properties (subject, to, cc, status, date of creation, priority) and a list of files attached will be included into the printout.
<b>Forward</b>		Select <b>Forward</b> to send an existing email to another recipient(s). The text of the previous email(s) and all attachments will be automatically included.
<b>Reply</b>		Select <b>Reply</b> to send a response email to the person who sent you the email. The text of the previous email(s) and all attachments will be automatically included.

Action	Icon	Description
Reply All		Select <b>Reply All</b> to send a response email to the person who sent you the email and also to everyone else who received the same email that you did. The text of the previous email(s) and all attachments will be automatically included.
Create New Email		Select <b>Create New Email</b> to create a new email. In cases where the user doesn't have sufficient rights to create new emails, this button will be hidden.
Delete Email		Select <b>Delete Email</b> to delete an email. In cases where the user doesn't have sufficient rights to delete emails, this button will be hidden.
Collaborate		Press this button to perform standard actions that can be performed on entities in CRM. They are described in the table below. In cases where the user doesn't have sufficient rights to perform all these actions, this button will be hidden.
Save View Preferences		Press this button to save current Filtering and Sorting configuration (see Arranging Emails for more details). Next time you open Email Preview window – saved configuration will be opened.
Refresh		Select <b>Refresh</b> to reload the list of emails.

### Collaboration functionality

The Collaborate functionality includes the following actions:

Action	Icon	Description
Connect		Select <b>Connect</b> to link an email to any other entity that exists in CRM: account, contact, opportunity, etc.
Add to Queue		Select this to add an email to the queue.
Assign		Select <b>Assign</b> to change the owner of the email. The original user loses ownership of the email but automatically shares it with the new owner.
Share		Select <b>Share</b> to share an email with other CRM users or teams. When you share email with another user or team, you set which permissions that user/team will receive.
Set Regarding		Select this to fill in the Regarding field in an email.
Copy a Link		Select this to copy a link that will open the email in the clipboard.

In cases the user doesn't have sufficient rights to execute all these actions, the corresponding buttons will be hidden.



## Searching Through Emails

Email Preview enables users to search for emails. Search is performed by Subject, Body, and Regarding fields. Email Preview performs case-insensitive searches using the word-beginning search principle.

For example, if you type “hand” in the search text box you can find emails that contain “Hand”, “handicraft”, “HANDY”.

### To search:

1. Type the search query into the search text box – the query should contain two or more characters.
2. Press **Search** or hit **Enter**.

Emails that match the search query will appear in the **List of Emails**. The first email in the list will be displayed in the Preview Pane by default. The matching text found in the emails will be highlighted in yellow (see Figure 12).

If filters were applied, only emails which match those filters will be shown.

### For example:

If you search for “old” and the Date filter is set to “**Today**”, only today’s emails with “old” in the Subject, Body, or Regarding field will be shown. Yesterday’s emails with “old” won’t be displayed.

To clear the results of the search, erase the text in the search text box and press **Clear** or hit **Enter**.

Subject, Body, or Regarding field will be shown. Yesterday’s emails with “old” won’t be displayed.

To clear the results of the search, erase the text in the search text box and press **Clear** or hit **Enter**.

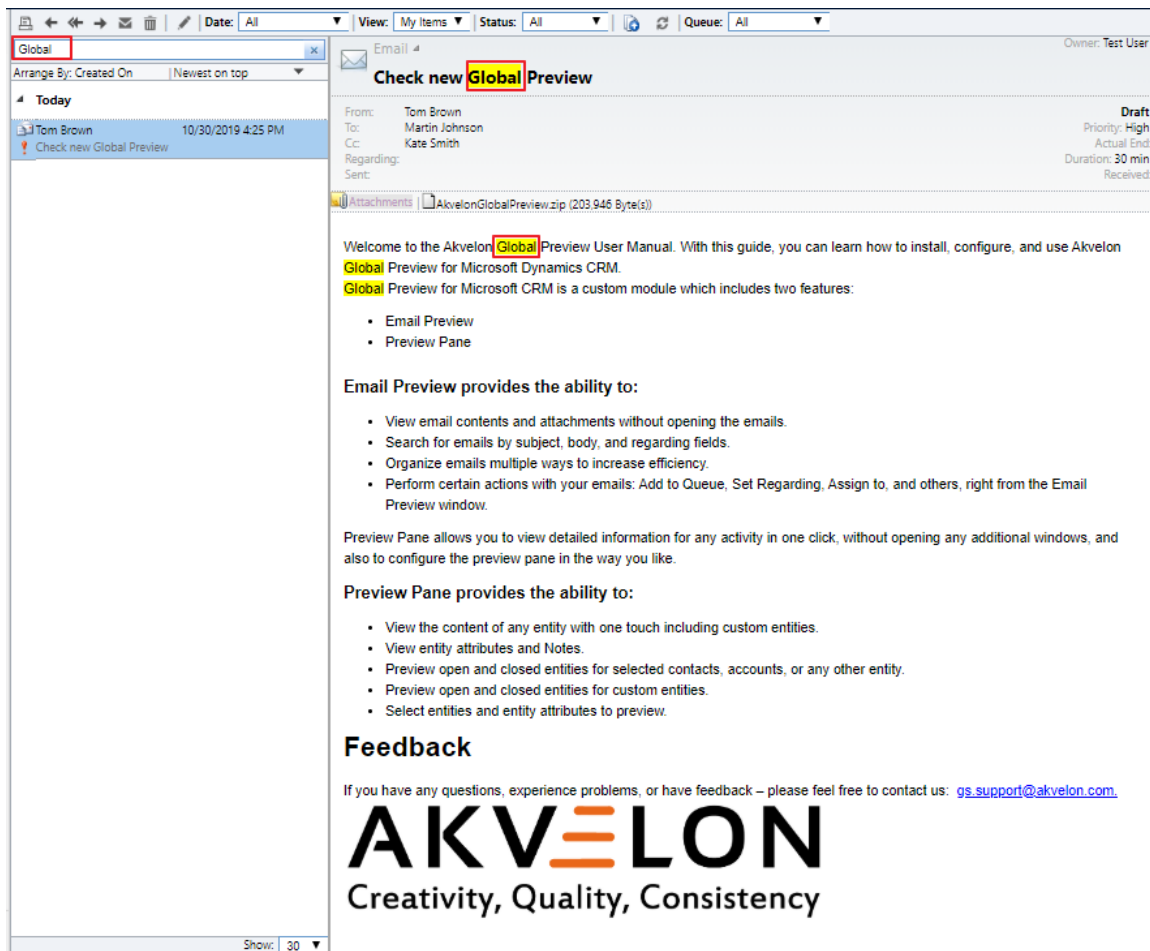


Figure 12 Email Searching

## Multiple Words Search

If several words are entered into the search text box, Email Preview will find all emails which contain both of those words in their Subject, Body, or Regarding fields.

### For example:

If you type **Jack London** into the search text box, search will find emails which have both **Jack** and **London** in their Subject, Body, or Regarding fields.

Search will find emails which have:

- "London is the capital of Great Britain. And Jack lives there."
- "Jack" in the subject and "London" in the body.

## Preview Pane

Preview Pane allows you to see the content and attributes of the selected entity.

### Preview Pane Locations

Preview Pane is available in views and forms:

#### 1. Inside Views:

- Open any view/grid on the Workplace, Sales, Marketing, or Service pages: Activities, Contacts, Accounts, Leads, Contracts, Opportunities, etc.
- Select any entity in the opened view – a preview pane for the entity will appear at the bottom (see Figure 13).

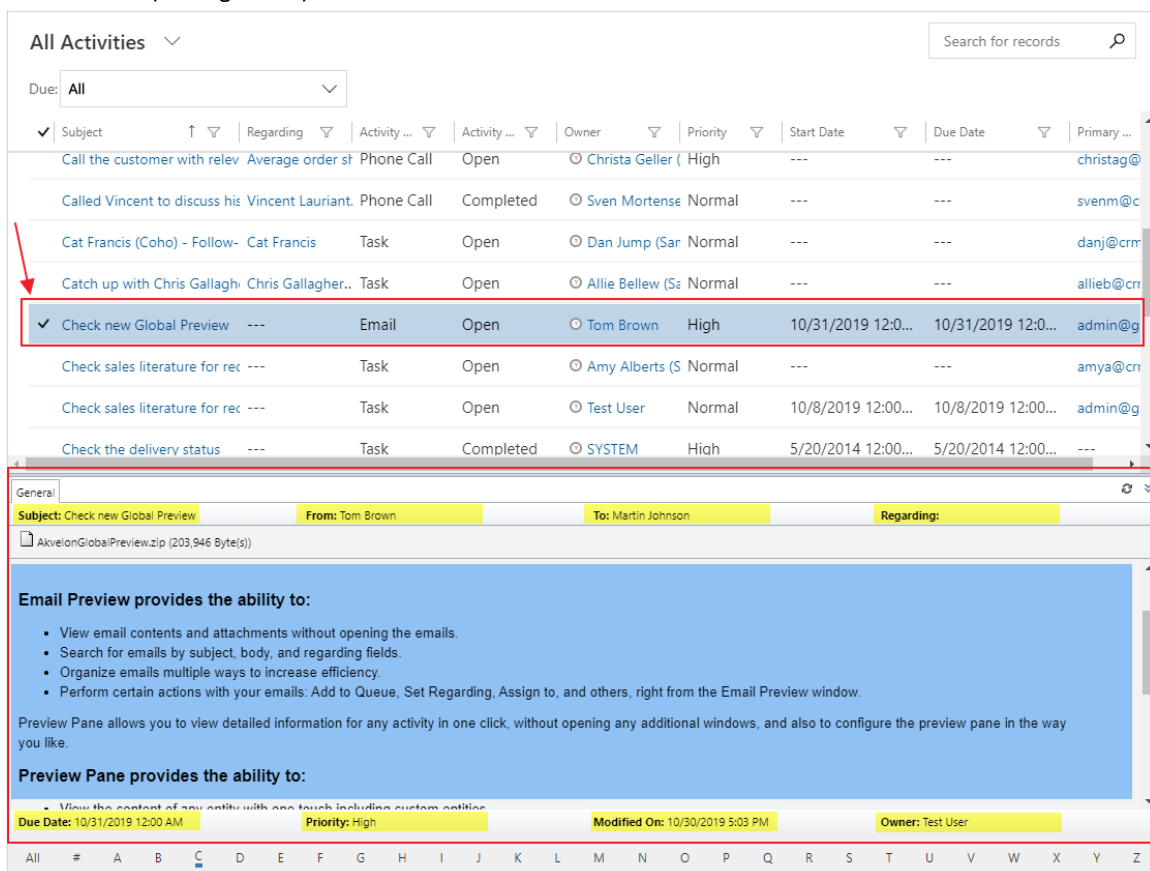


Figure 13 Preview Pane

#### 2. Inside Forms:

- Open any form (entity): Account, Contact, Opportunity, Lead, etc.
- Click any item related to an opened entity in the menu at the left: Activities, Closed Activities, Sub-Accounts, Connections, etc.
- Select any entity in the window that opens – a preview pane will appear at the bottom (see Figure 14).

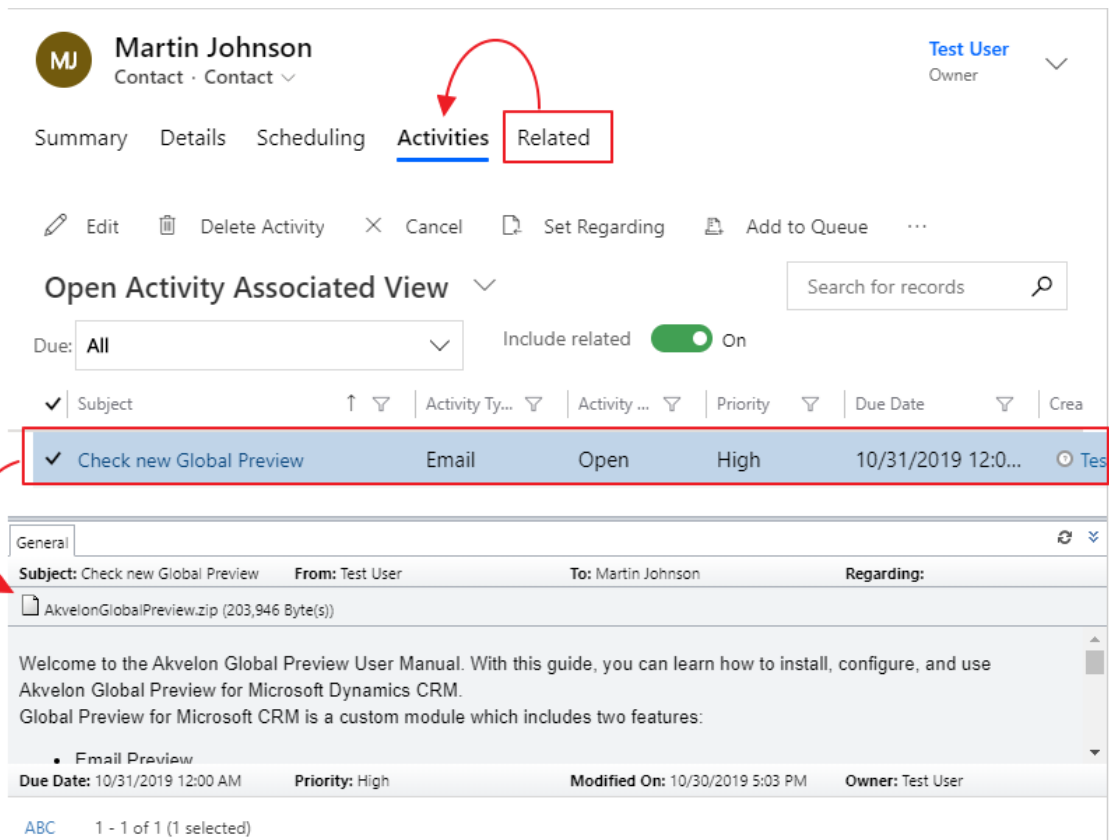


Figure 14 Preview Pane in opened entity

Preview Pane is also available for custom entities. You can add custom entities for preview via Global Preview Settings (see Switching Preview Pane On/Off for Entities section for more details).

## Preview Pane Window

The Preview Pane window contains two tabs:

**General Tab** – displays entity content and attributes.

**Notes Tab** – displays entity Notes information. The number shows how many notes the entity has (see Figure 15). If the entity doesn't have any Notes, the Notes tab will not be displayed.

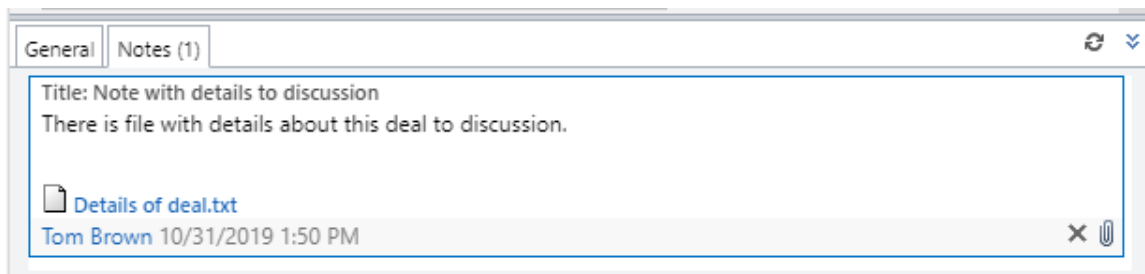


Figure 15 Notes tab

**General Tab** consists of three areas:

- the header
- the description area
- the footer

Entity attributes are displayed in the header and the footer. By default, there are four attributes in the header and four in the footer (see Figure 16).

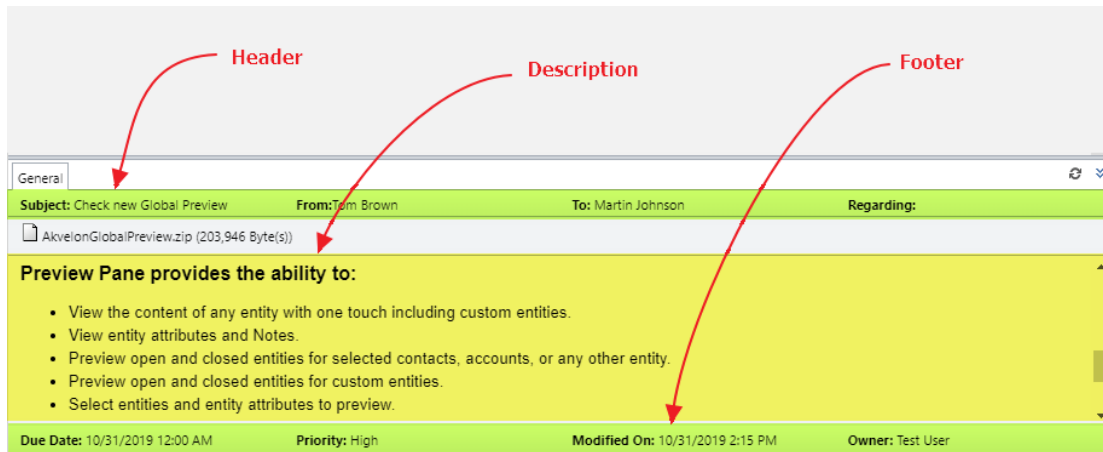


Figure 16 Entity attributes

The attributes shown can also be changed or switched off – select “**hidden**” in the **Global Preview Settings** area (for detailed information, see the Configuring Entity Attributes section).

The **Description** area contains entity description information: text, links, pictures, etc. It also may contain formatted text or an html page. The description area can also be hidden (see Figure 17).

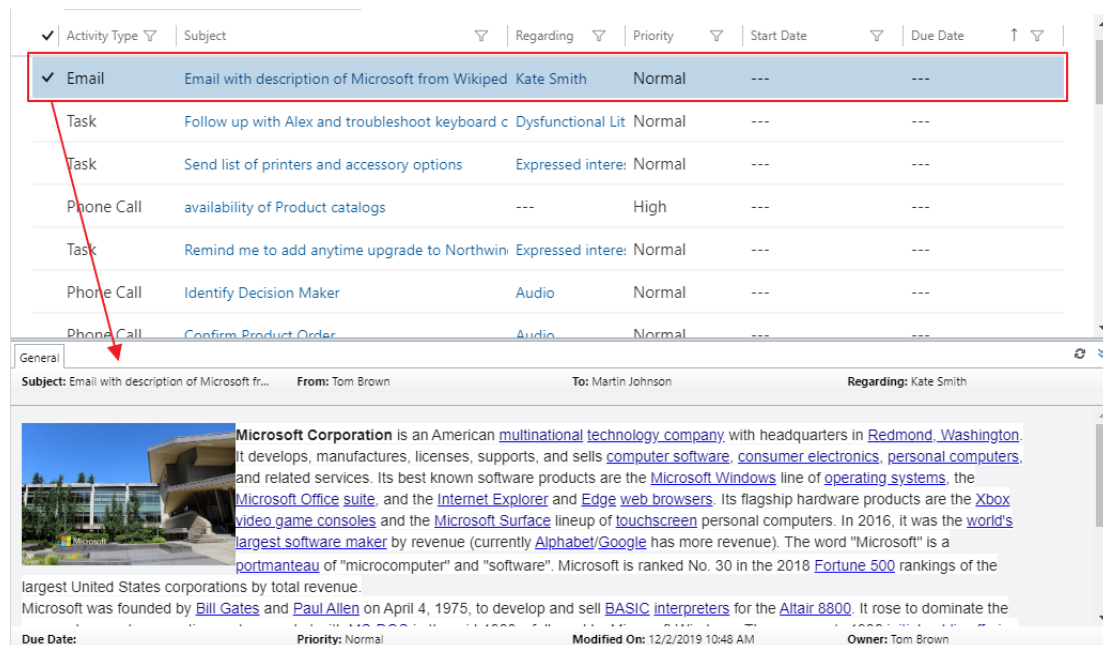


Figure 17 Description area

Users can tweak the Preview Pane Window size. **To resize** the Preview Pane Window, just drag the top border of the preview pane up or down.

**Please Note:** if you changed the entity by adding or editing notes, updating email attachments, etc., press the Refresh button to update the Preview Pane (see Figure 18).

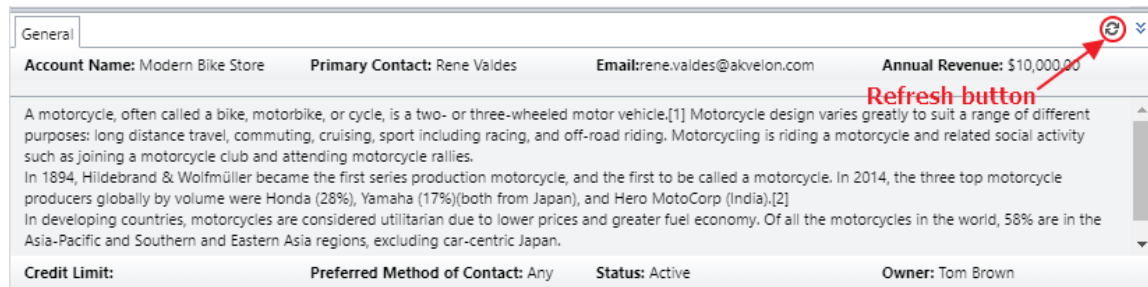


Figure 18 Refresh button

## Configuration

This chapter describes how to configure Global Preview roles, entities, attributes to search by, and attributes to display, within results.

### Global Preview Users Permissions

To allow users to work with Global Preview, you must assign them special permissions:

1. Go to **Settings → Security → Users**.  
If you use Dynamics CRM 2015 and lower, go **Settings → Administration → Users**
2. Select the user you want to provide with Global Preview permissions and press **Manage Roles** on the upper CRM menu.
3. Add appropriate role to the user:
  - assign the **Akvelon Global Preview Administrators** role to allow the user to change Global Preview settings (the user won't be allowed to work with Email Preview or view the Preview Pane)
  - assign the **Akvelon Global Preview Users** role to allow the user to work with Email Preview and the Preview Pane. Access to Global Preview settings won't be available for this user.

After you assign a role, click the **OK** button (see Figure 19).

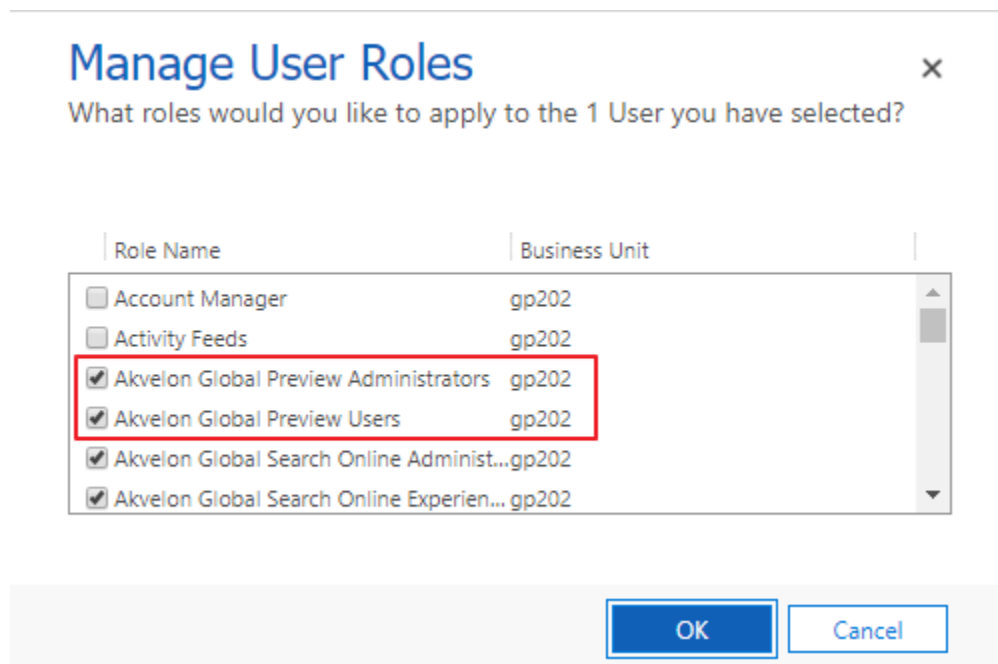


Figure 19 Global Preview Roles

4. In case you want to activate Email Preview link in the left navigation panel of opened entity (Account, Lead, Case, etc.) you should add ISV Extensions privilege to the security role (see Figure 20) assigned to your CRM users (e.g. Salesperson or custom role):
  - Open CRM Security Roles → Open specified security role (e.g. Salesperson)
  - Go to Customizations tab → Add ISV Extensions privilege





2. Press the **Manage Entities** button
3. In the **Entities Manager dialog** that opens:
  - **Select** entities you want to display the Preview Pane (switch on)
  - **Uncheck** entities you don't want to display the Preview Plane (switch off)
4. Press **Ok**

Changes will be applied for all Global Preview users.

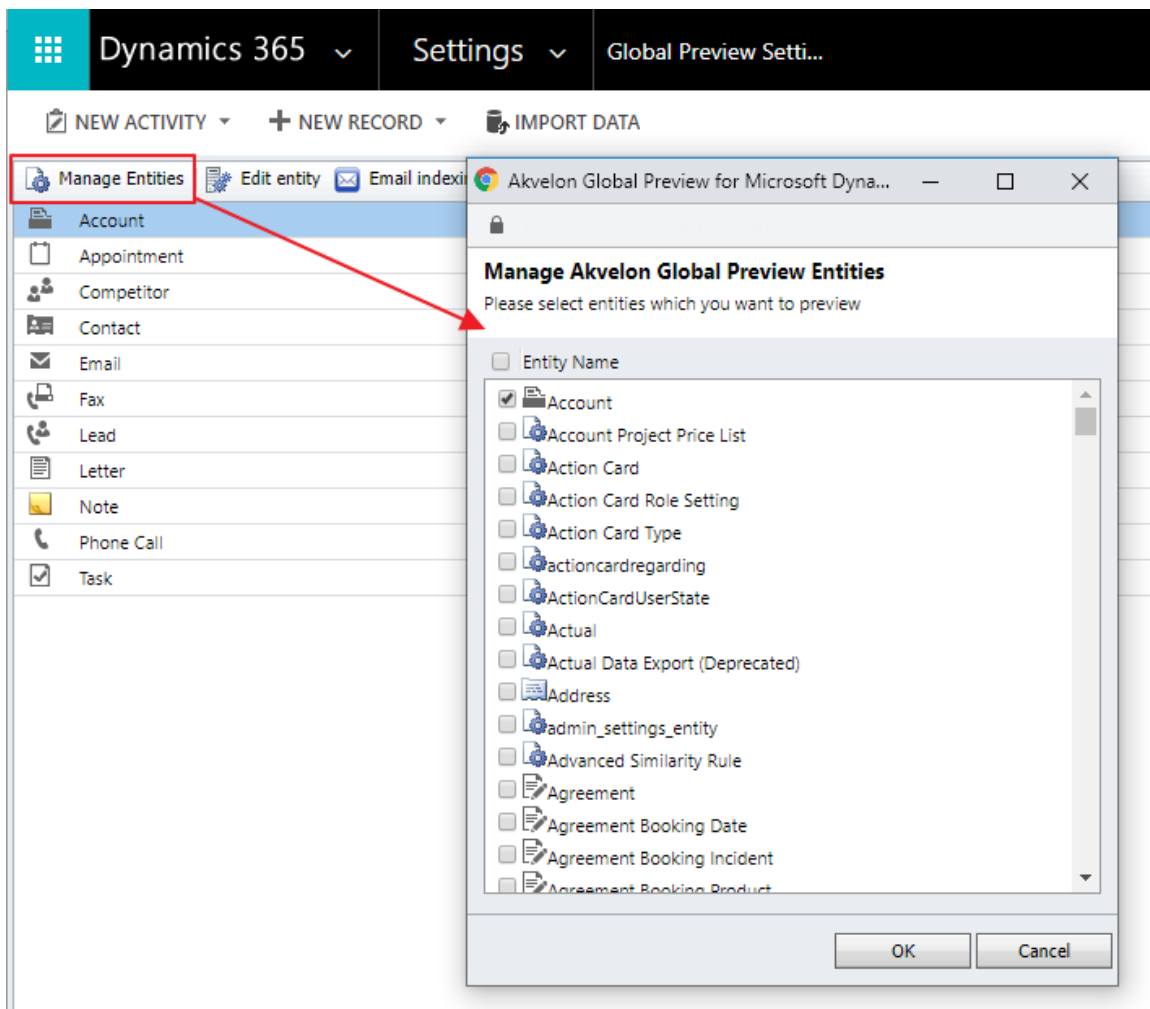


Figure 21 Manage Entities

## Configuring Entity Attributes

You can select entity attributes and how many of them to display in the Preview Pane.

**To change/hide attributes to display do the following** (see Figure 22):

1. Open **Settings** → click on **Global Preview Settings**.
2. Double click on the entity to configure (or select the entity and click the “**Edit entity**” button).
3. In the **Entities Manager dialog** that opens:
  - here you can edit header, description and footer areas;

- select any field (attribute) from the dropdown list to change the entity attribute to display;
  - check the **Hide** checkbox to hide this attribute in the Preview Pane.
4. Press **Ok**.

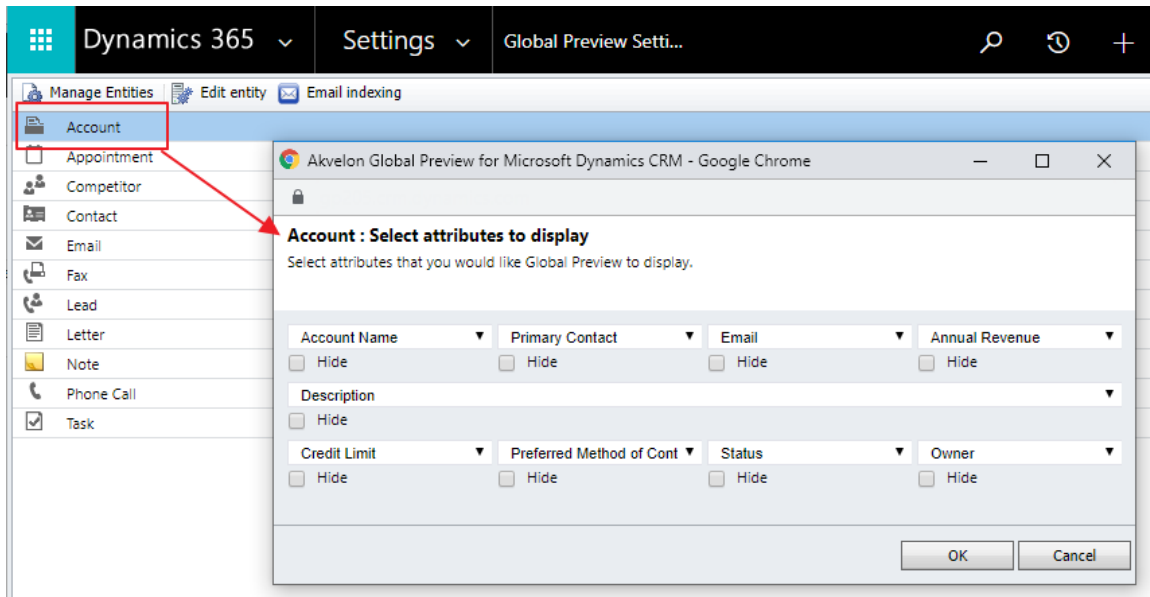



Figure 22 Manage attributes to preview

## Troubleshooting

Issue	Solution
Buttons Reply to, Reply All, Forward, New email are not working in the Email Preview.	Verify, that you added your CRM web site to exceptions of your browser pop-up blocker. Visit you browser support web-site to get more information: <ul style="list-style-type: none"> <li>• <a href="#">Mozilla Firefox</a></li> <li>• <a href="#">Google Chrome</a></li> <li>• <a href="#">Internet Explorer</a></li> <li>• <a href="#">Safari</a></li> </ul>
In Internet Explorer 11 doesn't show license status and it is not possible to activate or update the license.	Add your CRM web-site to Compatibility view exception, following <a href="#">this instruction</a> .
Preview Pane doesn't appear for a selected entity or appears with errors; when you click on buttons in Settings, they don't work or errors appear.	Verify you cleared the cache in Outlook and IE, see the <b>Upgrading from previous version</b> section.

Issue	Solution
Preview Pane doesn't appear for a selected entity.	Verify that this entity is selected in Global Preview Settings, see the <b>Switching Preview Pane On/Off for Entities</b> section.
Preview Pane appears, but some fields are not displayed – there is empty space in their places.	That may happen if the “Hide” check box is checked for those fields, see the <b>Configuring Entity Attributes</b> section.
You configured your Global Preview Settings one way, but after a while your settings changed – and you didn't change anything.	That may happen if another user pressed the “Save as default” button and his/her configurations were applied to all users.
Preview Pane is not displayed inside a custom entity form.	You should deactivate and re-activate Global Preview to make it “recognize” this new custom entity and show the Preview Pane for it.
You selected multiple rows in the view, but Preview Pane is not displayed for them.	Preview Pane is displayed for the first entity in the list of selected. Verify that the first entity is selected in Global Preview Settings, see the <b>Switching Preview Pane On/Off for Entities</b> section.
You updated an Attachment or Note, but Preview Pane displays the old information.	Press the refresh button to update Preview Pane.
<p>Preview Pane doesn't appear when you click on an entity, and when you click on the Email Preview link, you see this error message:</p>  <p>Akvelon Global Preview: Insufficient privileges. You do not have sufficient access rights or privileges to view this page. Akvelon Email Preview Users or Akvelon Global Preview Users role has to be assigned to you to use Akvelon Global Preview. Please contact your Microsoft Dynamics CRM administrator.</p>	Verify you've assigned Global Preview roles to this user, see <b>Global Preview Users Permissions</b> section.
You can work with Email Preview, but can't view Preview Pane. When click Global Preview Settings link, you get “Insufficient privileges.” error.	Verify Global Preview roles have organization level privileges for Akvelon Mail Organization Settings and Akvelon Mail User Settings entities. See <b>Global Preview Users Permissions</b> section.

## Feedback

If you have any questions, experience problems, or have feedback – please feel free to contact us: [gs.support@akvelon.com](mailto:gs.support@akvelon.com).

The Akvelon team encourages and appreciates leaving feedback about Akvelon Global Search at the [App Source](#) site.