



CRM Innovation, LLC

## **InLine Help User Manual**

**V1.0**

## InLine Help User Manual

### InLine Help

InLine Help provides guidance to a CRM user when they are filling out CRM forms by allowing the creation of custom tooltip messages that are displayed on mouseovers of form labels or controls. The tooltip messages are created from within a custom CRM entity (Tool Tips) and are viewable by users who are members of a CRM Team(s) that has been associated with a tool tip.

Tooltips can be of a simple text format or be stylized using HTML code that can be applied to the text. Stylized tool tips can even have hyperlinks to external files or sites. Tooltip creators are CRM users that have been granted rights to create and save tool tip entity records. No programming is required to create tool tips. All tool tip management occurs within the CRM interface.

This product can be used:

- by development teams to self document the customizations they are implementing,
- as an integral part of the initial user training documentation, or
- remedial assistance to support new users that join the system after the initial CRM rollout.

Once a user no longer needs a tool tip they can be removed from the CRM Team assigned to that tool tip and it won't be visible to them any longer. It is even possible to have more than one tool tip message per form attribute – thereby allowing the creation of an instructional message for different groups of people using the form (i.e. one for Sales and the other for Marketing).

This is a CRM 4.0 product which works when online, offline and in the IFD mode and is deemed to implemented in a manner that would qualify it as a supported ISV solution.

**Note:** It is necessary that the Tool Tip Custom entity be added to the security roles of those Users who will need to see a Tooltip. This is done through the standard CRM Security Role Interface.

#### **“Tooltip Settings” page:**

A CRM user that has been granted rights to the Settings page will be able to enable InLine Help for any all custom and customizable entities. The user can enable the entities for which they require to provide the Tooltips. Only entities enabled here and published would be displayed in the Entity picklist in the Tooltip entity for Tooltip settings.

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Layout of tooltip settings page is shown in the following screen.

Settings	Tooltip Settings	
Administration	<input type="checkbox"/>	<input type="checkbox"/>
Business Management	<input type="checkbox"/>	<input type="checkbox"/>
Customization	<input type="checkbox"/>	<input type="checkbox"/>
Templates	<input type="checkbox"/>	<input type="checkbox"/>
Product Catalog	<input type="checkbox"/>	<input type="checkbox"/>
Workflows	<input type="checkbox"/>	<input type="checkbox"/>
Data Management	<input type="checkbox"/>	<input type="checkbox"/>
System Jobs	<input type="checkbox"/>	<input type="checkbox"/>
Tool Tips	<input type="checkbox"/>	<input type="checkbox"/>
<b>Tooltip Settings</b>	<input type="checkbox"/>	<input type="checkbox"/>
autonumber	<input type="checkbox"/>	<input type="checkbox"/>
<b>Workplace</b>		
Sales	<input type="checkbox"/>	<input type="checkbox"/>
Marketing	<input type="checkbox"/>	<input type="checkbox"/>
Service	<input type="checkbox"/>	<input type="checkbox"/>
<b>Settings</b>	<input type="checkbox"/>	<input type="checkbox"/>
Resource Center	<input type="checkbox"/>	<input type="checkbox"/>

Save	Cancel	Entity Name
<input type="checkbox"/>	<input type="checkbox"/>	All Entities
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Account
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Address
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Appointment
<input type="checkbox"/>	<input type="checkbox"/>	autonumber
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Campaign
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Campaign Activity
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Campaign Response
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Case
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Competitor
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Contract
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Contract Line
<input checked="" type="checkbox"/>	<input type="checkbox"/>	E-mail
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Facility/Equipment
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Fax
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Invoice

The user will need to return to this page when the entity form has been updated with new attributes as it will be necessary to re-Publish the revised Form attributes. So the steps would be: return this page and select the check box in the Save column for those entities that need to have a refresh done as a consequence of Form changes. If not, then those 'new' attributes will not be available in the Tooltip form record entity picklist (subsequent step)

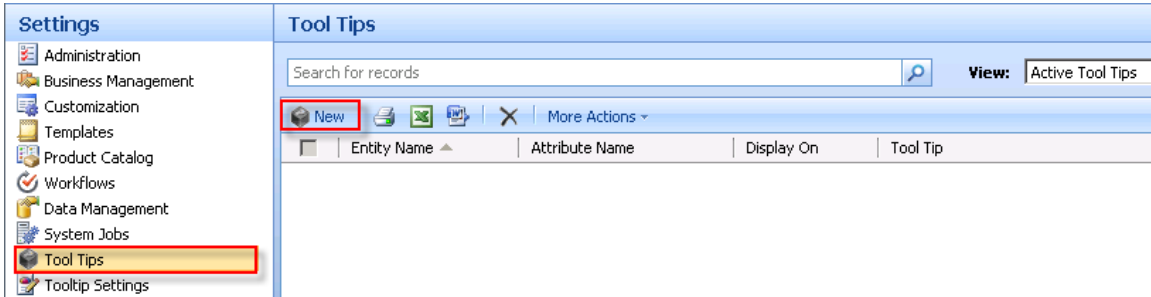
**Note:** If the user disables an entity that was previously enabled and there also exist Tooltips for the attributes of this entity we don't allow that entity to be unpublished before the existing Tooltip records are deleted (deactivating those records is not sufficient)

There is a check process on this form to validate that a user can disable an entity. If the validation fails a warning message will be displayed.

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## Tooltip Entity:

When InLine Help was installed it created a custom entity called Tooltips. Be sure to give all the users in your CRM system a security role that allows them to Read Tooltips. Users that need to have the rights to create Tooltips will need expanded privileges of course (create, write, append, append to). This entity behaves like a typical CRM custom entity.

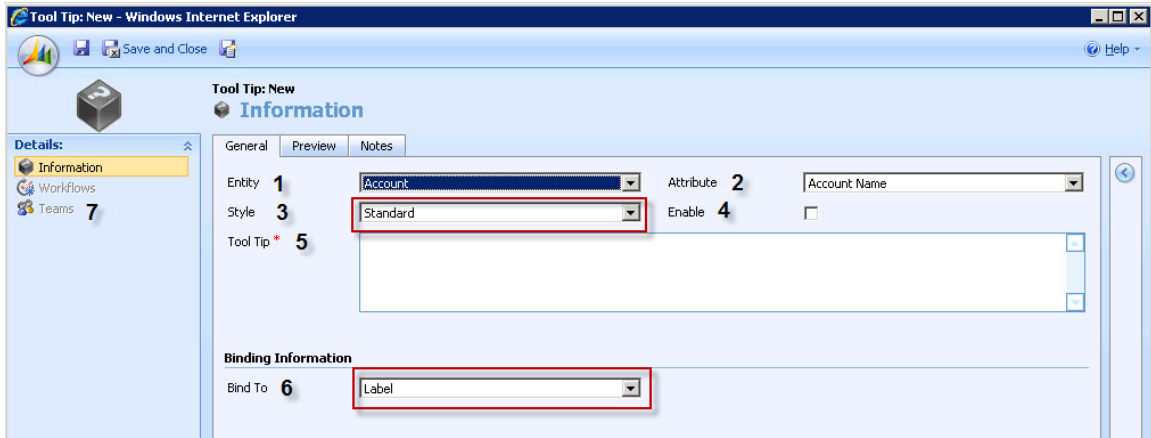


To create a new tooltip click on “New” option shown in above screen view and then user will see a new tooltip form.

Depending on the style selected (#3); the user will be allowed to set different features. By default “Standard” level is selected.

## Standard Tooltip:

For a “Standard” style the tooltip form will display as shown in the following screen.



Screen Reference	Attribute Name	Purpose
1	Entity	This is where you select the entity that will get a Tooltip. Only entities that have been selected and published from the Tooltip Settings screen from within the Settings area will be appear in this list. Any customizable entity (including custom entities) can be on this list.
2	Attribute	Select the attribute that will get the Tooltip. Any published attribute on the form can have one or more Tooltips associated with it. You can even have a Tooltip that is triggered off of the label and the control on one attribute. Note: This list uses the display name of the attribute. However, if there is more than one attribute on the form that has the same display name, after the first attribute we will use the schema name for those attributes in the pick list.

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3	Style	There are two different styles of Tooltips available - Standard or Stylized. The Standard style appears like the standard CRM tool tip, plain rectangular box with black text on a yellowish background. No additional formatting is allowed. The Stylized Tooltip is a balloon looking view with the capabilities of controlling the Font Family, Font Color and Font size. The Stylized Tooltip can only be associated with the control.
4	Enable	You can easily turn on/off the display of the Tooltip for all associated Teams by checking/unchecking the Enable box. If you create a Tooltip and enable it but don't assign a team, it won't show up for any users. Using the check box is a convenient way to either get Tooltips ready to be deployed or temporarily remove them from use without removing the Teams associated with the Tooltip. Once you select the Enable box we check to see if any Teams are associated with the Tooltip, if they aren't we display a reminder notification to do so. Alternatively, if you are completely done with the Tooltips you can either Deactivate it from the Grid View, More Actions button or possibly use the Delete function to completely remove it from the CRM system.
5	Tool Tip	This is where you enter the text to appear in the Tooltip. Use it like Notepad with the capability of including HTML tags to enhance the look of the text, like making it <code>&lt;strong&gt;bold&lt;/strong&gt;</code> . <code>&lt;MARQUEE&gt;</code> You can even go back to the original days of the Internet and make the text move across the tooltip <code>&lt;/MARQUEE&gt;</code> NOTE: the HTML commands are only interpreted when you bind the Tooltip to a control, not to the Label. It will work however within a Standard or Stylized Tooltip.
7	Teams	A Team must be associated with the Tooltip otherwise it will not be viewable by the users. Only the members of that Team will be able to see that Tooltip. Multiple Teams can be associated with one Tooltip.

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### Stylized Tooltip:

When you select Stylized as the Tooltip Style an expanded view of the Standard Style form is displayed. The function of fields 1-5 are identical to the previous function. The new fields are as follows:

Screen Reference	Attribute Name	Purpose
6	URL	The URL attribute appears when the Stylized Tooltip look is selected. You can enter any valid hyperlink in this field - Internet web page, Intranet web page, and link to a file, anything that can be referenced via a hyperlink. The hyperlink will be inserted automatically at the end of the Tooltip window, with the clickable text shown as <code>&lt;a href="http://www.crmInnovation.com"&gt; More Information&lt;/a&gt;</code> . The link will open in a new browser window.
7	Height	The Height setting becomes available when you select bind to Control only. This field is where you can enter the number of pixels high you want to set the tool tip to be. If you leave it blank or insert a value of 0 it will automatically wrap to the minimum size to display the text. If you enter a value then it will attempt to set the height of the tip to the number of pixels specified. Depending on the value you enter for the Width this may or may not generate scroll bars. Note: If the dimensions of the Tooltip creates scroll bars you won't be able to scroll the text unless you also enter a Timer value (measured in milliseconds). But the timer attribute only becomes available if you creating a Stylized Tooltip. So be sure to inspect the consequences of the width/height settings in the Preview tab prior to saving the Tooltip.
8	Width	The Width setting becomes available when you select Bind To Control only. This field is where you can enter the number of pixels wide you want to set the tool tip to be. If you leave it blank or insert a value of 0 it will automatically wrap to the minimum size to display the text. If you enter a value then it will attempt to set the width of the tip to the number of pixels specified. Depending on the value you enter for the Height this may or may not generate scroll bars. Note: If the dimensions of the Tooltip creates scroll bars you won't be able to scroll the text unless you also enter a Timer value (measured in milliseconds). But the timer attribute only becomes available if you creating a Stylized Tooltip. So be sure to inspect the consequences of the width/height settings in the Preview tab prior to saving the Tooltip.

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9	Horizontal	Using the Horizontal/Vertical settings you can position the Tooltip to the left or the right or top or bottom relative to the label or the control. This setting is available for either type of Tooltip - Standard or Stylized, but only when bound to the control. The default setting is Right/Bottom. This Tooltip is positioned Left/Top.
10	Vertical	Using the Horizontal/Vertical settings you can position the Tooltip to the left or the right or top or bottom relative to the label or the control. This setting is available for either type of Tooltip - Standard or Stylized, but only when bound to the control. The default setting is Right/Bottom. This Tooltip is positioned Right/Top
11	Bind To	The Bind To is where you select to trigger the Tooltip mouseover using either the attribute's label or control. Standard style Tooltips can be triggered via either one, Stylized Tooltips can be triggered only by the control.
12	Timer	Enter a value in the Timer field that will cause the Tooltip to be displayed in that number of milliseconds (i.e. 5000 = 5 seconds). Use this feature when you embed a HTML hyperlink in the Tooltip and don't use the URL link feature to do it. The Timer allows the user than to move their mouse off of the trigger location (label or control) and find and click on the link in the Tooltip. The Timer field is only visible for Stylized Tooltips. Or alternatively use the Timer to let the use to read through the data entry guidance. The Tooltip will disappear when the Timer value runs out or if the user clicks on the mouse, whichever comes first. This Tooltip has a Timer value of 8 seconds.
13	Font Family	When you select a Stylized Tooltip you can control the look of the text further by picking a Font Family: Tahoma, Arial, Times New Roman, and Font Size: 8-12, and Font Color: Black, Green, Red, and Purple. The default settings are: Tahoma, Black, 11. This one is set to: Times New Roman, Red, 10. Customization Note: It is possible to add more fonts to this list. Go into the Tooltip entity in the customizations area and add the name of the Font Family to the picklist. The same can be done for Font Color and Font Size.
14	Font Size	When you select a Stylized Tooltip you can control the look of the text further by picking a Font Family: Tahoma, Arial, Times New Roman, and Font Size: 8-12, and Font Color: Black, Green, Red, and Purple. The default settings are: Tahoma, Black, 11. This one is set to: Times New Roman, Red, 10. Customization Note: It is possible to add more fonts to this list. Go into the Tooltip entity in the customizations area and add the name of the Font Family to the picklist. The same can be done for Font Color and Font Size.
15	Font Color	When you select a Stylized Tooltip you can control the look of the text further by picking a Font Family: Tahoma, Arial, Times New Roman, and Font Size: 8-12, and Font Color: Black, Green, Red, and Purple. The default settings are: Tahoma, Black, 11. This one is set to: Times New Roman, Red, 10. Customization Note: It is possible to add more fonts to this list. Go into the Tooltip entity in the customizations area and add the name of the Font Family to the picklist. The same can be done for Font Color and Font Size.

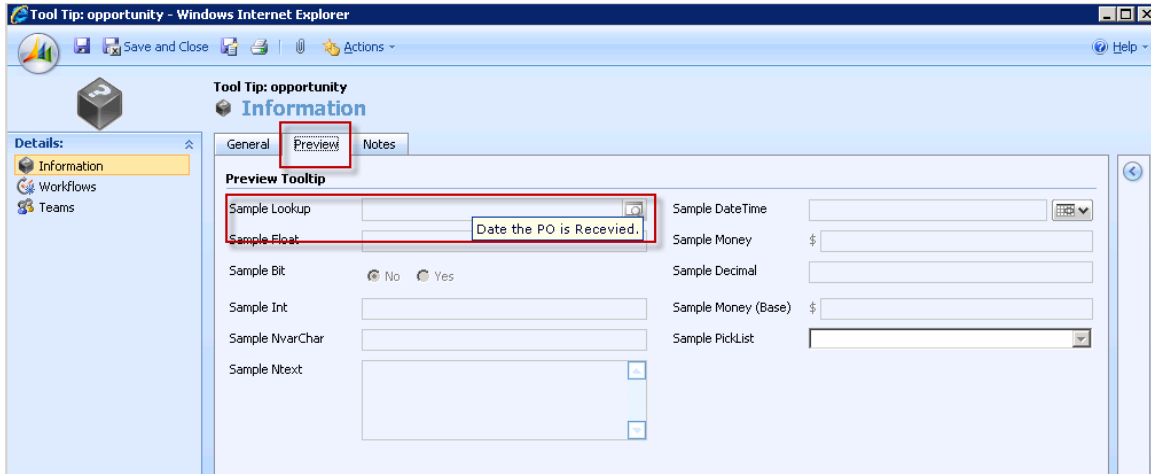
The screenshot shows the configuration interface for an InLine Help tooltip. It has three tabs: 'General', 'Preview', and 'Notes'. The 'General' tab is active. The settings are as follows:

- Entity:** Account (dropdown)
- Attribute:** Account Name (dropdown)
- Style:** Standard (dropdown, highlighted with a red box)
- Enable:**
- ToolTip \*:** A large text area for the tooltip content.
- ToolTip Size/ Position:**
  - Height:** [Empty text box]
  - Width:** [Empty text box]
  - Horizontal:** Right (dropdown)
  - Vertical:** Bottom (dropdown)
- Binding Information:**
  - Bind To:** Control (dropdown, highlighted with a red box)

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## Preview Functionality:

A preview functionality is built into the Tool Tip, navigate to the Preview tab and you can test out the look of the Tooltip before you leave the form. The preview function responds immediately to any changes you make on the General tab, you do not have to save the record to see the effect of the change(s).



## Teams Reminder:

After you check the Enable box, the system will determine if there are already any Teams associated with this Tooltip, if not you will receive a reminder to associate a Team with this Tooltip.

