Global Preview v.1.0
for Microsoft Dynamics CRM 2011

User Manual

Contents

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 2011.

Global Preview for Microsoft CRM 2011 is a custom module which includes two features:

- Email Preview
- Preview Pane.

Email Preview allows you to work with your email quickly and effectively.

Email Preview provides the ability to:

- View email contents and attachments without opening the emails.
- Spell-check 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 2011 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 User 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 product.sales@akvelon.com.

Installation

Global Preview Installation if You Have Email Preview Installed

During installation, Global Preview will install Email Preview by default – this may cause certain compatibility problems.

So, if you already have Email Preview installed, you should deactivate and remove it before installing Global Preview + Email Preview:

First deactivate Email Preview:

1. Open your CRM web page – log on as a user with System Administrator privileges.
2. Open **Workplace** > **My Work** > **Email Preview**.
3. Press the **About** button.
4. Press the **Deactivate** button in the **License window** that opens – wait until deactivation is completed.

Then uninstall Email Preview:

1. Open **Control Panel** > **Programs** > **Programs and Features**.
2. Find **Global Preview** (Activity Preview is the old version) in the list of programs > select **Global Preview**.
3. Press the **Uninstall** button – wait until the uninstall process completes.

You can also check the **Uninstall Global Preview** section for additional information.

After Email Preview is deactivated and uninstalled, you can start Global Preview installation (see the **Global Preview Installation** section).

Please note: the license key for Email Preview cannot be used for Global Preview. Please contact us to get a new license key.

Please note: We strongly recommend emptying the cache in the IE browser before working with Global Preview (see the **Global Preview Installation** section).

Global Preview Installation

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

1. Log on to your Microsoft Dynamics CRM server using an account that has administrative privileges.
2. Run **GlobalPreview-x64.msi**. If UAC is enabled, right-click on the setup file and select "Run as Administrator."
3. Follow the installation wizard.
4. After installation, Global Preview should be activated. An activation window for the CRM server **default organization** will open after installation. If you need to activate Global Preview for a non-default organization you should open the activation page manually (see the **Activation** section for more details).
5. Give search rights to users (see the **Global Preview User Permissions** section).

Please note: In cases where Email Preview or Global Preview was previously installed on your computer, we strongly recommend clearing browser and Outlook cache before using the tool.

Internet Explorer: Make sure you first close Outlook > Tools > Internet Options > Browsing history area > press Delete > select two check boxes > press Delete.

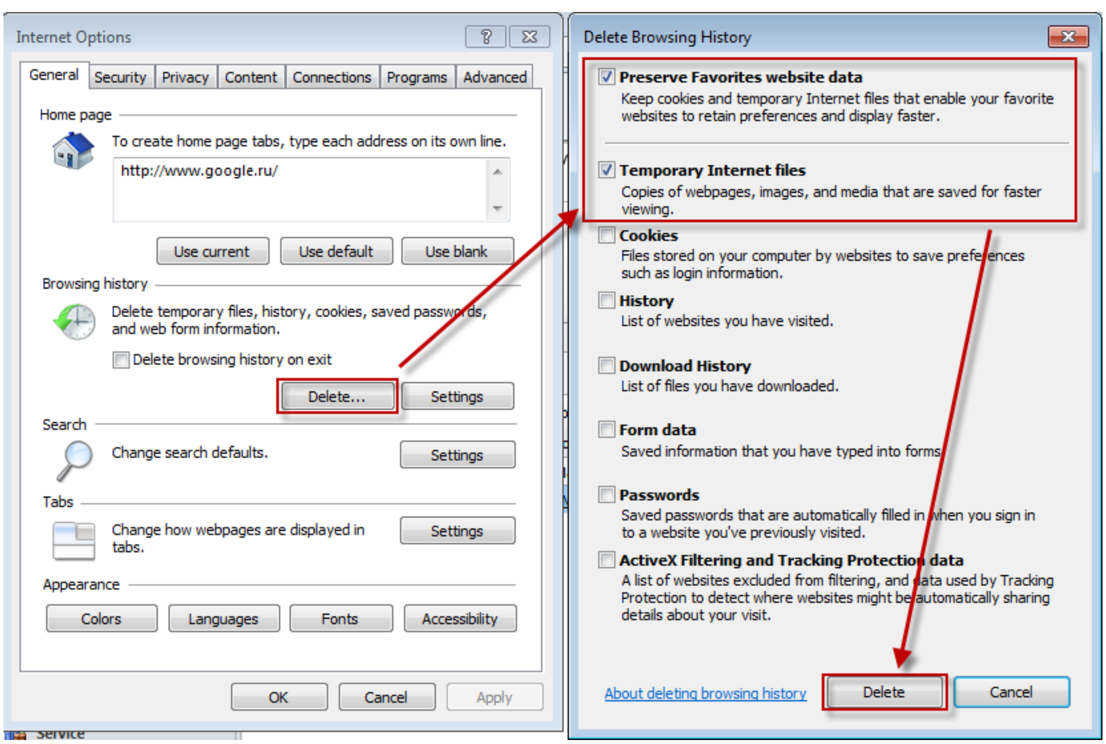


Figure 1. Clear Browser Cache

Outlook 2010: open File tab > Options > select Advanced > press “Custom Forms…” > “Manage Forms…” > press “Clear Cache” > restart Outlook.

Outlook 2007: click on Tools menu > Options > select “Other” tab > click on Advanced Options > press “Custom Forms…” > “Manage Forms…” > press “Clear Cache” > restart Outlook.

Then:

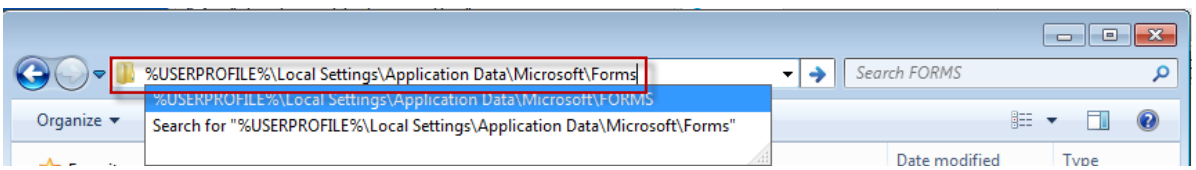
Close Outlook.

Open C:\Users\<username>\AppData\Local\ Microsoft\FORMS > delete FRMCACHE.DAT

Open C:\Users\<username>\AppData\Local\ Microsoft\Outlook > delete all files with .ost extension.

Start Outlook.

To quickly access these folders, copy, then paste the lines into the address bar of Windows Explorer:



%USERPROFILE%\Local Settings\Application Data\Microsoft\Forms

%USERPROFILE%\Local Settings\Application Data\Microsoft\Outlook

Activation

Activate Global Preview separately for each organization.

Please note: Only users with **CRM System Administrator** role can activate Global Preview.

To activate Global Preview for an organization, open the following page in your browser (the activation page for the server default organization will open when the installation is complete): **http(s)://CrmOrganizationAddress/ISV/Akvelon/Mail/Pages/Activator.aspx**
(For example: http://tds.crmdemo.akvelon.net/ISV/Akvelon/Mail/Pages/Activator.aspx).

On the activation page 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 (see Figure 2. License Window) and click **OK.**

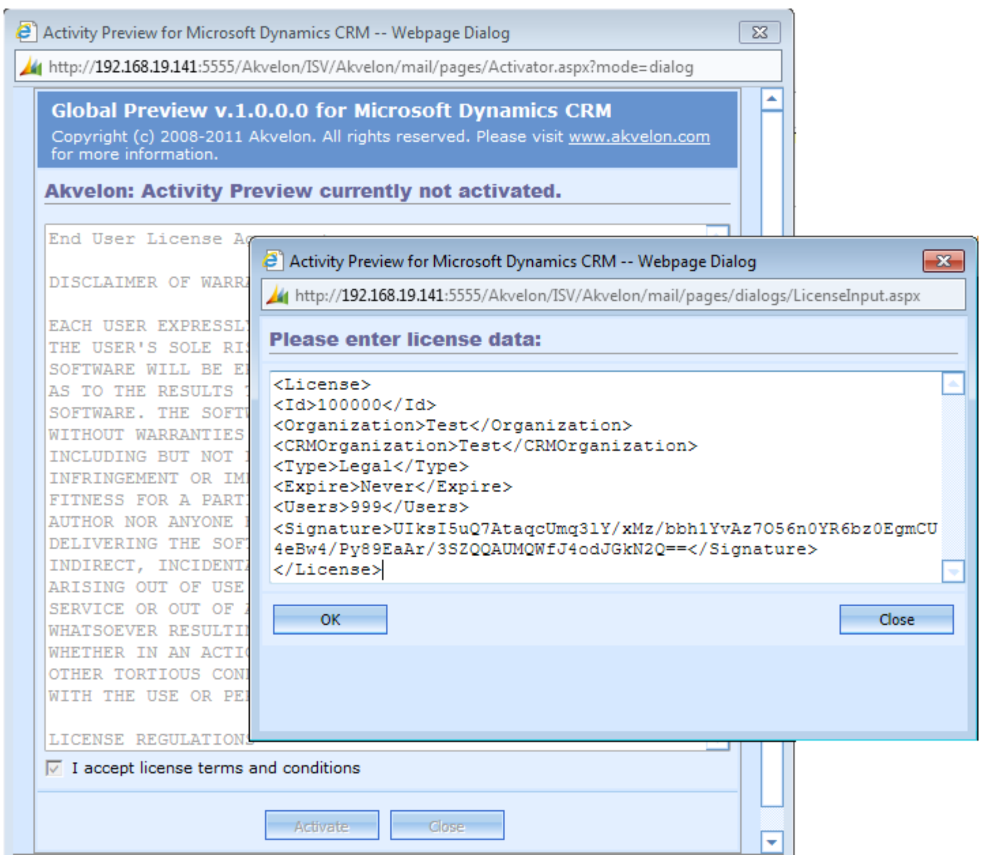


Figure 2. License Window

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

Updating License Data

If you need to update license data (e.g. to replace a trial license with a commercial license or to update the number of users) go to **Settings** > **Global Preview Settings,** and click the **About** button at the upper right-hand corner. Then click the **Update license** button, input the new license data into the license textbox (see Figure 3. License Information Window) and click the **Update license** button.

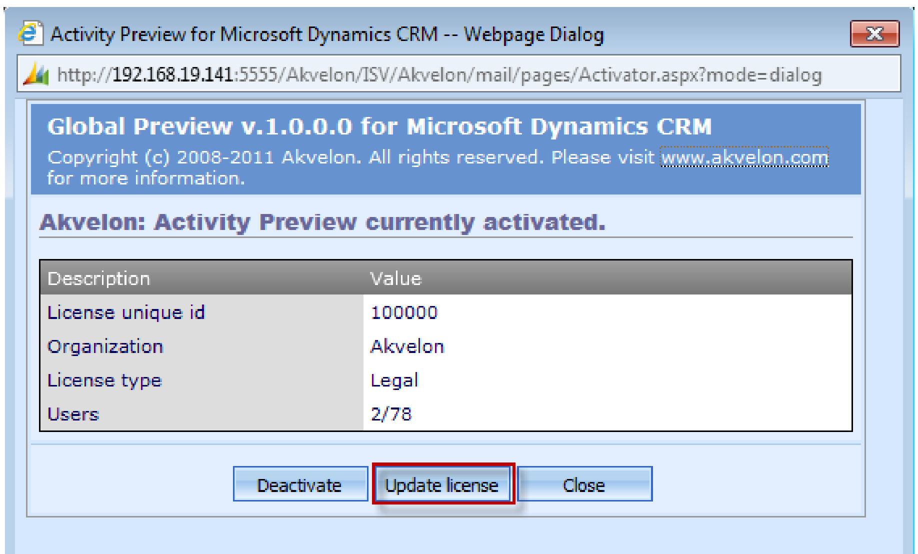


Figure 3. License Information Window

Global Preview Settings Backup/Restore

All configuration settings for Global Preview are stored inside the CRM database and do not require additional backup.

If you restore CRM from a backup to a new server you should install Global Preview (please see **Installation** section). All activation, license, and configuration data will be preserved.

Uninstall Global Preview

To uninstall Global Preview, please follow these steps:

1. **Deactivate Global Preview for ALL CRM organizations that have it enabled.**

   Please note: Only users with **CRM System Administrator** role can deactivate Global Preview.

   To deactivate Global Preview go to **Settings** > **Global Preview Settings** and click the **About** button at the upper right-hand corner. A window with license information will open (see Figure 4. License Information Window). Click the **Deactivate** button.

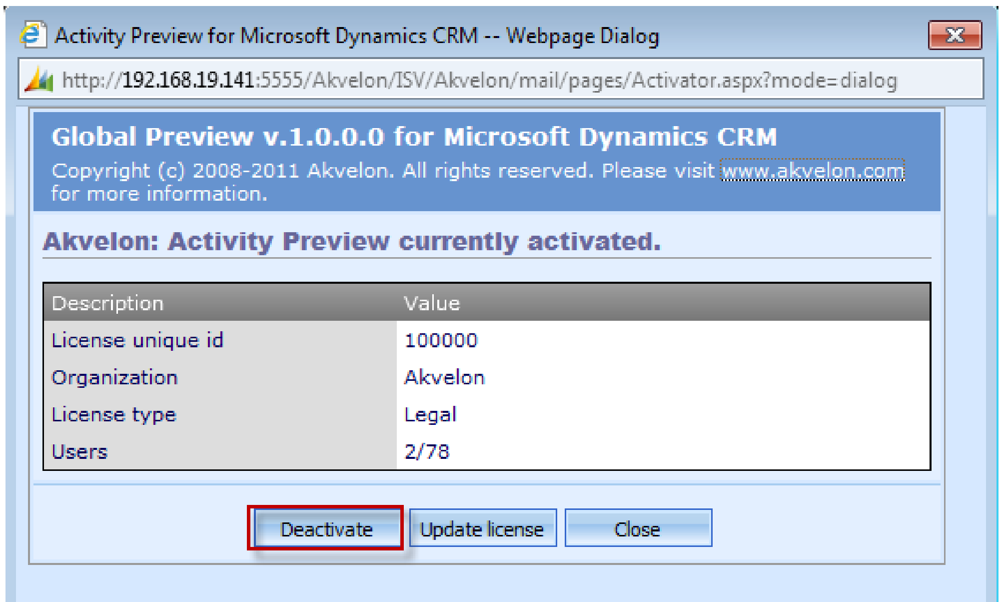


Figure 4. License Information Window

2. Uninstall Global Preview using the “Add/Remove Programs” utility in the Microsoft Windows Control Panel (name in programs list: “Global Preview”), or using the Global Preview installer.

Email Indexing

After you have installed and activated Email Preview, you should perform email indexing. Email indexing will significantly speed up your search.

For example, searching 10,000 emails may take 1- 5 minutes without indexing. It will take about 2 seconds after email indexing is performed.

To index emails (see Figure 5. Email Indexing)**:**

1. Go to **Workplace** > **Email Preview**
2. Click the **Settings** button at the upper right-hand corner
3. Press the **Enable Email Index** button

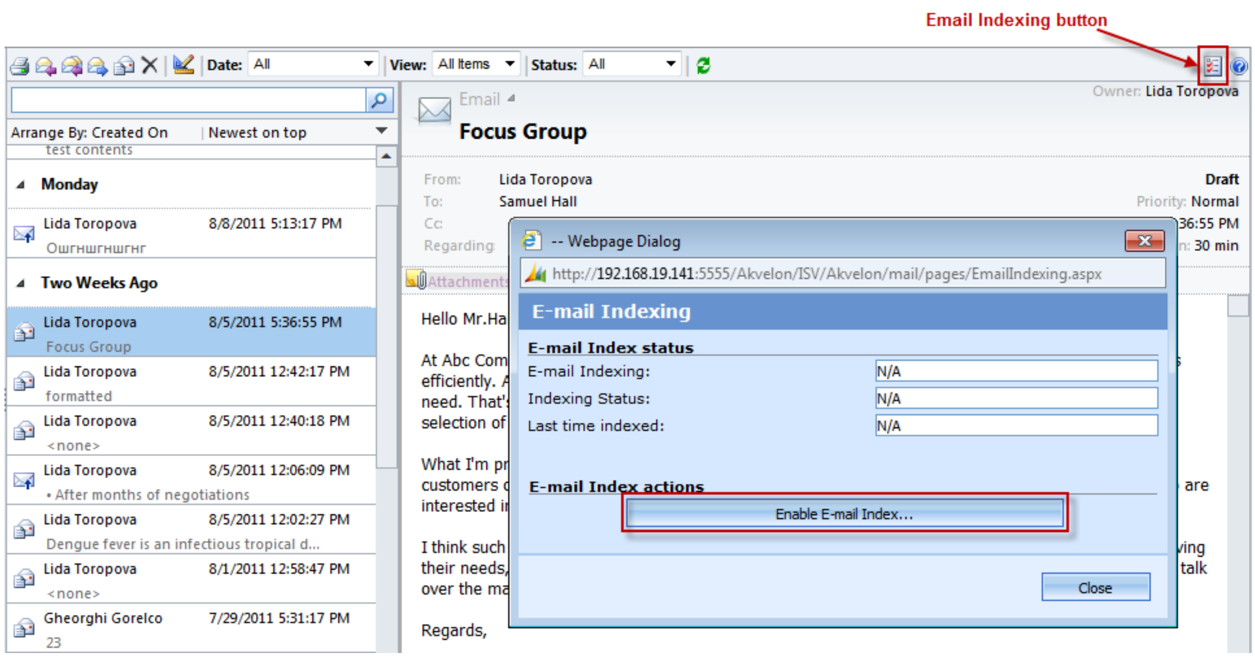


Figure 5. Email Indexing

Please Note: if the dialog window says that email indexing is enabled and completed even though you didn't enable it for Email Preview, you should disable indexing and then enable it again, otherwise Email Preview search may work incorrectly.

To do that:

- Press the **Disable Email Index** button
- wait until the index is disabled
- press the **Enable Email Index** button

4. Wait until emails are indexed.

Please note:

1. Only users with **CRM System Administrator** role can perform email indexing.

2. Email Indexing is performed in CRM Database for Subject, Body, and Regarding fields.
3. SQL Server Agent must be running.
4. Email Indexing can take from several minutes to several hours depending on the volume of emails in the system and their contents (about 1 hour for 10000 emails).
5. After the Email Index is created, it will be updated every 15 minutes to ensure newly created emails are also indexed.

Working with Akvelon Global Preview

Akvelon Global Preview includes two features:

- Email Preview
- Preview Pane

You can find the detailed information about these features in Akvelon Email Preview and the sections below.

Akvelon Email Preview

To use Email Preview, go to **Workplace** and click on the **Email Preview** icon (see Figure 6. Email Preview Link and Preview Pane).

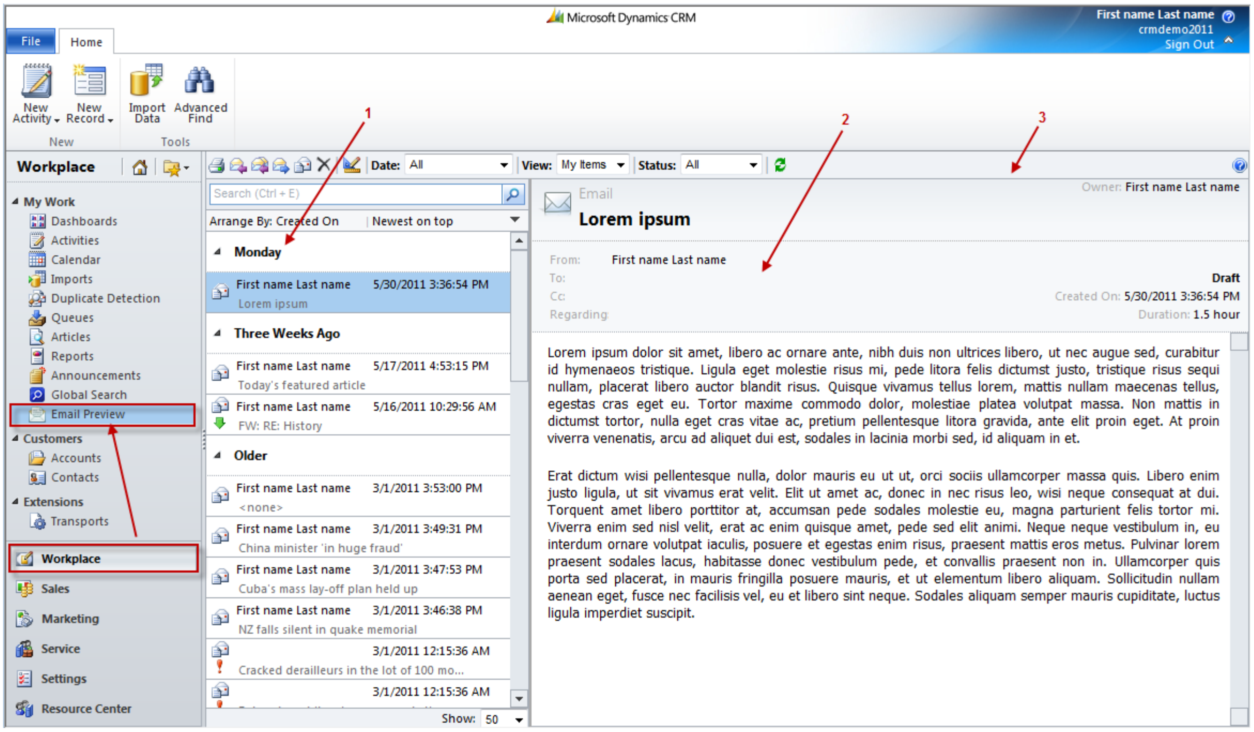


Figure 6. Email Preview Link and Preview Pane

The Email Preview window includes the following areas (see Figure 6. Email Preview Link and Preview Pane):

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 7. List of Emails). 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.

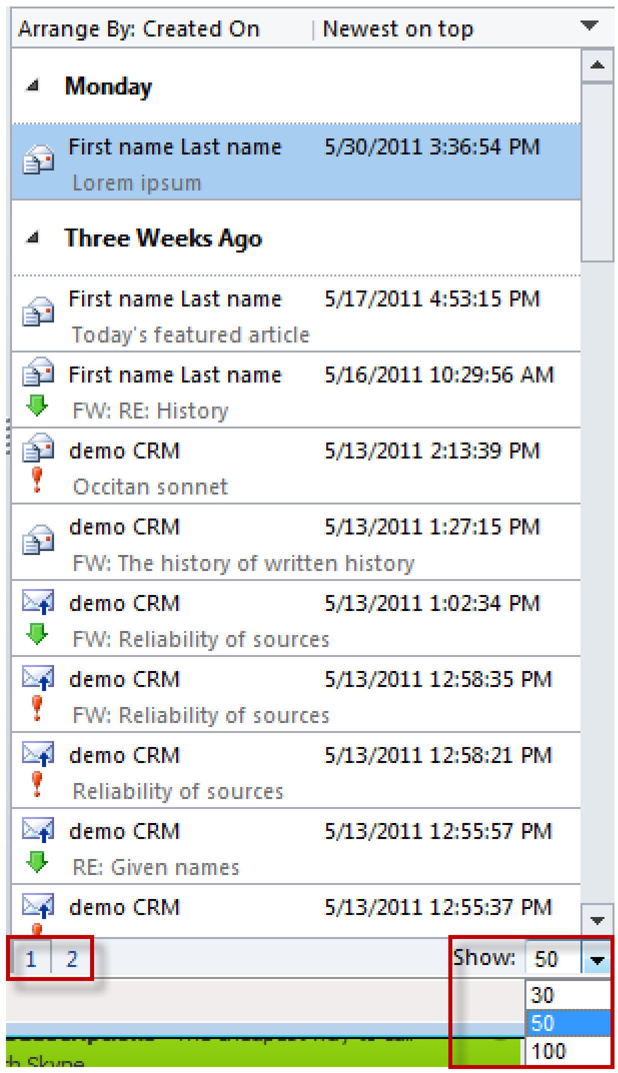


Figure 7. List of Emails

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 8. Filters):

Filter Name	Description
Date	Allows users to view emails created within a specified date range.
View	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).
Status	Allows users to view only emails with the specified status.

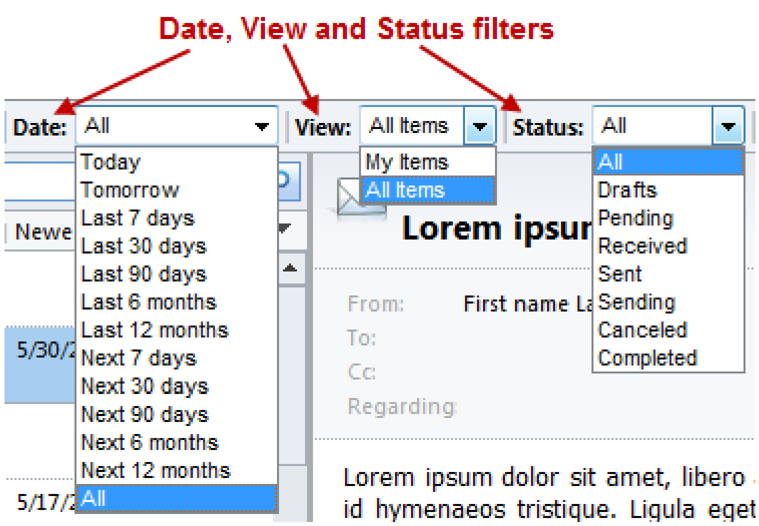


Figure 8. Filters

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
Print		Select **Print** 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.
Forward		Select **Forward** to send an existing email to another recipient(s). The text of the previous email(s) and all attachments will be automatically included.
Reply		Select **Reply** 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.
Reply All		Select **Reply All** 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 **Create New Email** 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 **Delete Email** to delete an email. In cases where the user doesn't have sufficient rights to delete emails, this button will be hidden.
Refresh		Select **Refresh** to reload the list of emails.
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.
Settings		Press this button to enable Email Indexing (see the **Email Indexing** section). In cases where the user doesn't have sufficient rights to perform this action, an error message will appear.
About		Press this button to view the license information and update or disable the Email Preview license (see the **Updating License Data** section). In cases where the user doesn't have sufficient rights to perform this action, an error message will appear.

Collaborate functionality

The Collaborate functionality includes the following actions:

Action	Icon	Description
Connect		Select **Connect** 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 **Assign** 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 **Share** 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 where the user doesn't have sufficient rights to execute all these actions, the corresponding buttons will be hidden.

Search

Please note: before searching, verify that email indexing is enabled (see the **Email Indexing** section).

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 9. Search).

Figure 9. Search

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**.

Please note: search is performed in all emails, but only a maximum of 450 matching emails will be displayed.

Wildcard Search

Wildcard Search is not available in this version of Email Preview.

Multiple Words Search

If several words are entered into the search text box, Email Preview will find all emails which contain 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 **Jack** or **London** or 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.
- "**Jack**" in the Subject, Body, or Regarding field and no **"London"** anywhere.

Please note: Multiple Words Search uses the "**OR**" principle. That means that every additional word in the search text box won't increase the specificity of the search, instead it will increase the number of emails found. To make a search query more specific, use quotation marks (see the **Search with Quotation Marks** section).

Search with Quotation Marks

When you know that the email you are searching for contains some specific text, you can easily find it using search with quotation marks.

For example:

You know for sure that the email contains the phrase **"wonderful. Evening"** in the text. Type in these words as a search query using quotation marks – you cannot use dots, commas, or other punctuation marks: just **"wonderful evening"**. Search will find all emails which have this text in the Subject, Body or Regarding fields.

Please note: matching text will be highlighted every time, except when either the search query or the matching text contains any punctuation marks or special symbols.

You can also combine **Search with Quotation Marks** with **Multiple Words Search**.

For example:

You may enter **“arranged the meeting” discuss** or **“arranged the meeting” “suns project”** – in these cases each part of search query will be accepted as a separate “word” and a search will be performed using the “OR” principle.

This search will find emails which have:

- **“arranged the meeting”** in the email body and **“suns project”** in the subject
- **“arranged the meeting”** in the subject and **discussion** in the body
- or both search terms in the Subject, Body, or Regarding fields
- as well as only one term, such as **“arranged the meeting”**.

Email Preview vs. Entities

Email Preview gives users the ability to view and work with emails which belong to a specified entity: account, contact, company, opportunity, etc. To open the Email Preview workspace for a specified entity, open any of the existing records – account or contact – and click on the Email Preview icon in the Common list at the left – the icon appears in all entities marked as activities when you install Email Preview. The window that opens will contain all emails in which the selected entity was a sender, recipient, CC recipient, or BCC recipient (see Figure 10. Emails for Specified Entity).

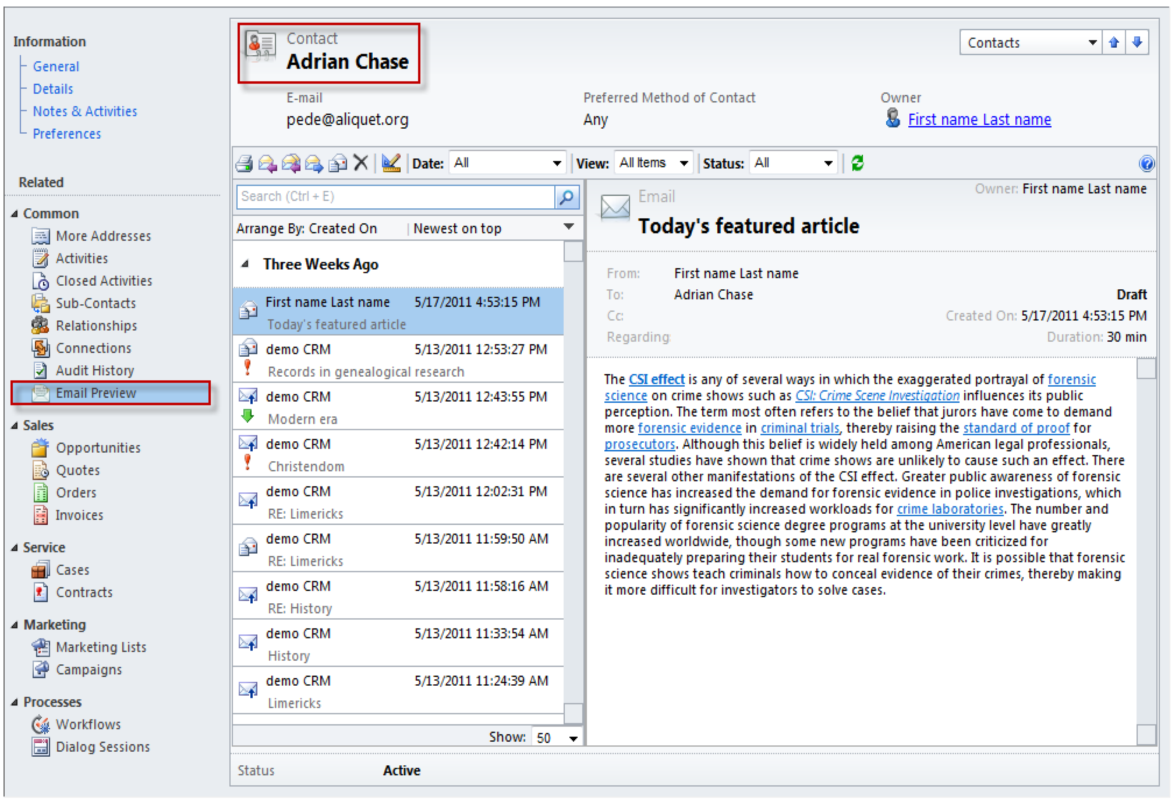


Figure 10. Emails for Specified Entity

For example, you have a contact, "Jack Smith", and when sending emails you selected him as a recipient twice, as a CC recipient five times, and as BCC recipient three times. So, if you open the record for "Jack Smith" and click on the Email Preview icon, you will see all ten emails concerning Jack Smith.

Spell Check

Email Preview provides you with the ability to check spelling in the body of emails.

To spell check, open any existing email or create a new one and press the **"Spelling"** button – Email Preview will begin spell checking. When an unknown word is found the Spell check dialog box will be displayed (see Figure 11. Spell Checking).

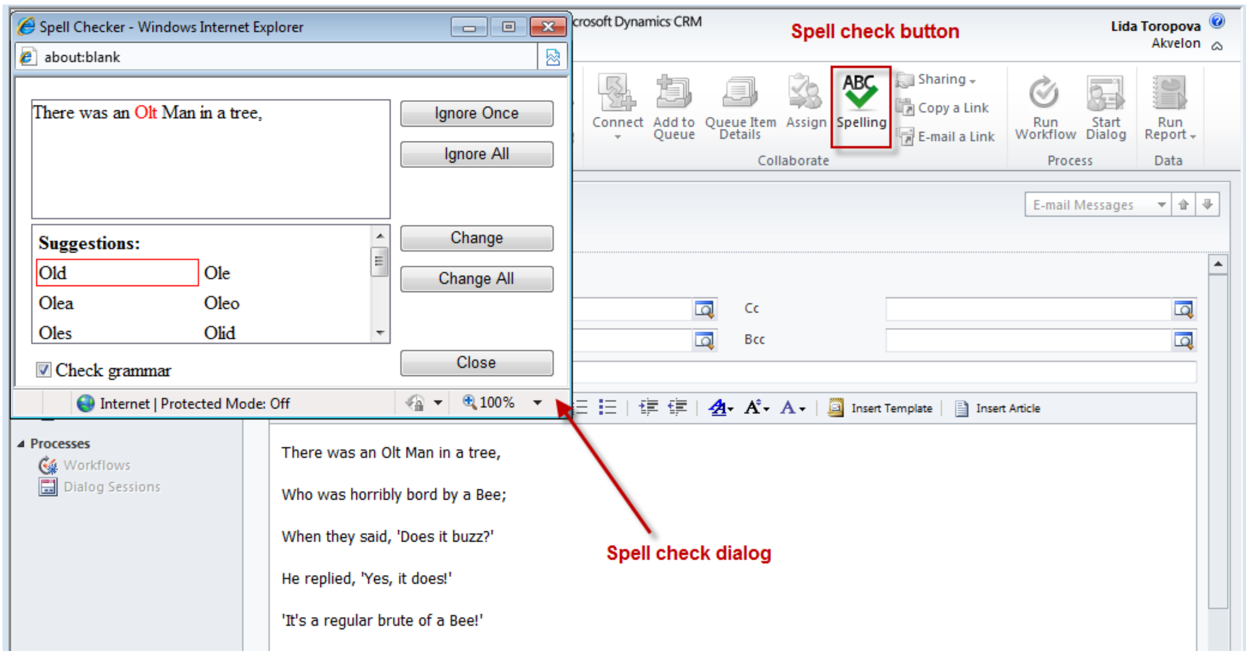


Figure 11. Spell Checking

The dialog suggests several options:

Option	Description
Ignore Once	Select **Ignore Once** to skip this occurrence of the unknown word without correcting it and continue spell checking.
Ignore All	Select **Ignore All** to skip the unknown word and all future occurrences of the word. This rule is applied for the current spell check session only.
Change	Select **Change** to change this occurrence of the unknown word and continue spell checking. You can type a word manually in the text field at the top or click on a word in the Suggestions list.
Change All	Select **Change All** to change both this occurrence and all future occurrences of the unknown word without prompting for confirmation. This rule is applied for the current spell check session only.
Check grammar	Select **Check grammar** to check grammar and punctuation in the text.
Close	Select **Close** to stop spell checking.

Please note: Corrections confirmed while spell checking will be applied after the spelling window is closed (either because spell check is finished or if you press the Close button to stop checking).

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. **In Views:**
   - open any view 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 12. Preview Pane).

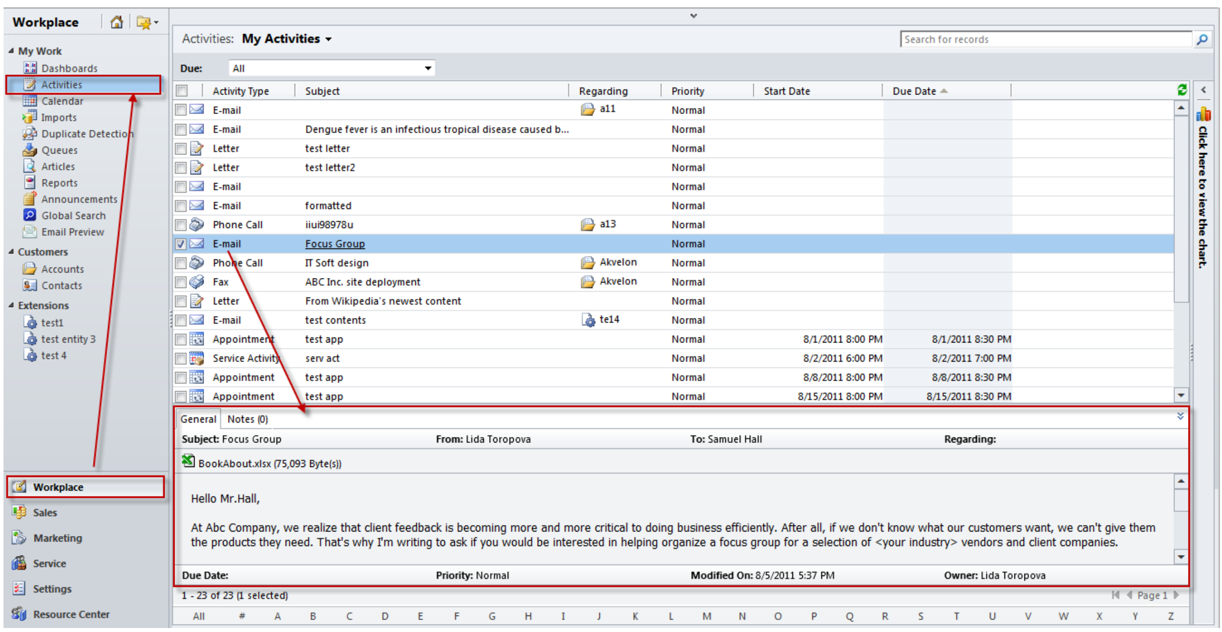


Figure 12. Preview Pane

2. **In Forms:**
   - open any form (entity): Account, Contact, Opportunity, Lead, etc.
   - click on 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 13. Preview Pane in Forms)

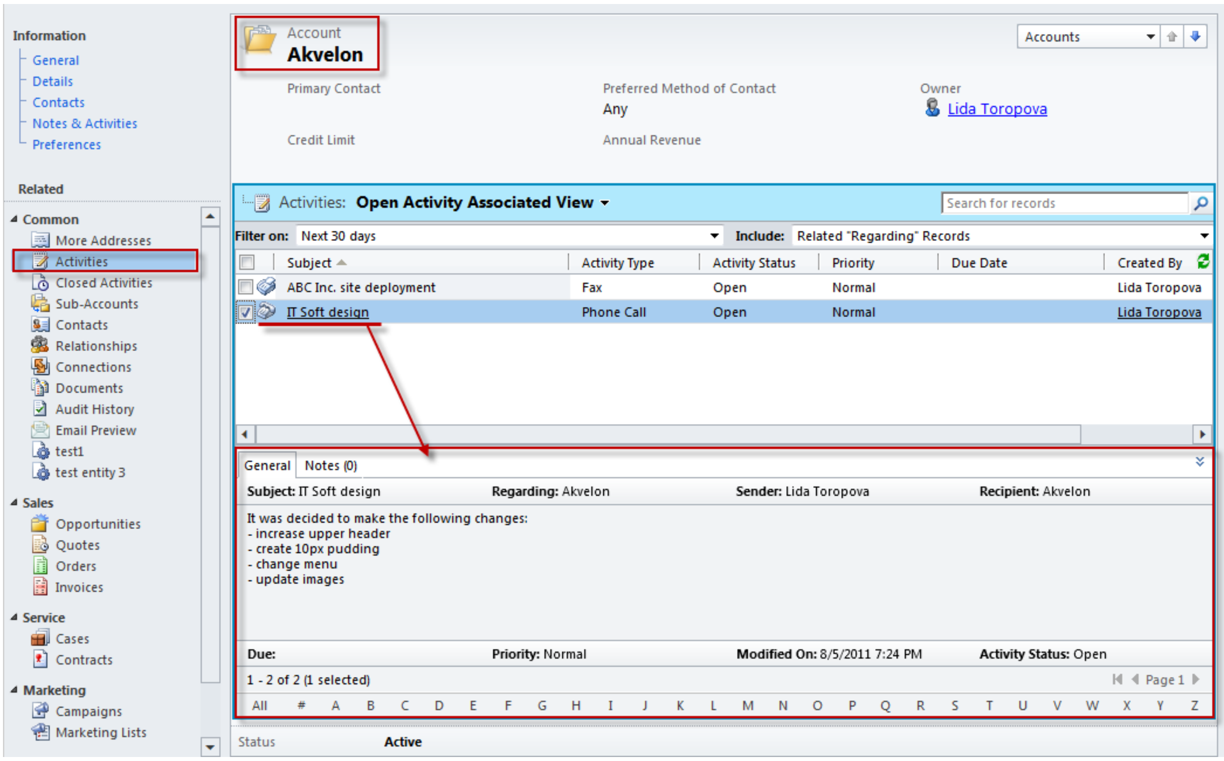


Figure 13. Preview Pane in Forms

Preview Pane is also available for custom entities.

Entities Available in Preview Pane

By default, the following entities are available in the Preview Pane:

- Accounts
- Appointments
- Cases
- Contacts
- E-mail Messages
- Faxes
- Leads
- Letters
- Notes
- Opportunities
- Phone Calls
- Tasks

Other entities, including newly created custom entities, are switched off by default, but they can be switched on in the **Global Preview Settings** area (for detailed information, see the **Switching Preview Pane On/Off for Entities** section).

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 14 Notes Tab). If the entity doesn't have any notes, the Notes area will be empty and the Notes tab will have a "Notes (0)" label.

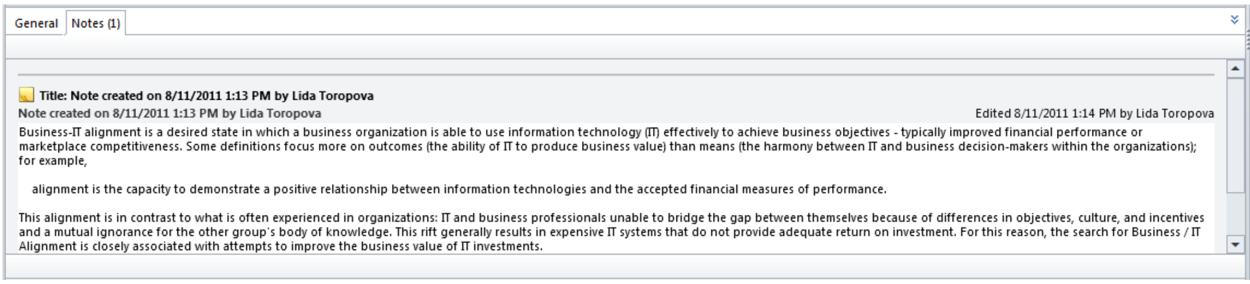


Figure 14 Notes Tab

If the entity doesn't have a Notes area, the Notes tab will not be displayed (see Figure 15. Entity without Notes Tab).

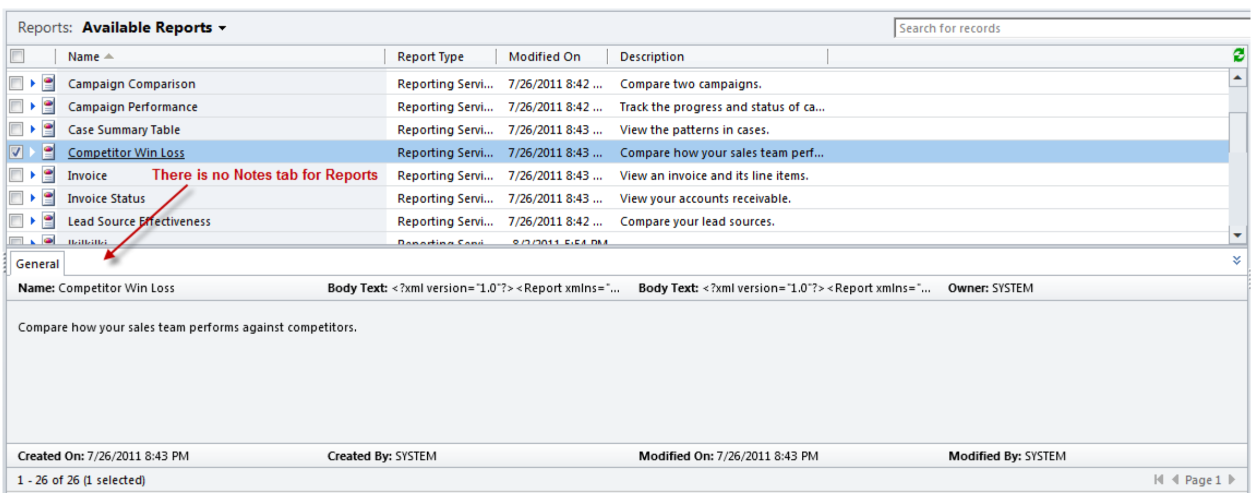


Figure 15. Entity without Notes Tab

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. Entity Attributes).

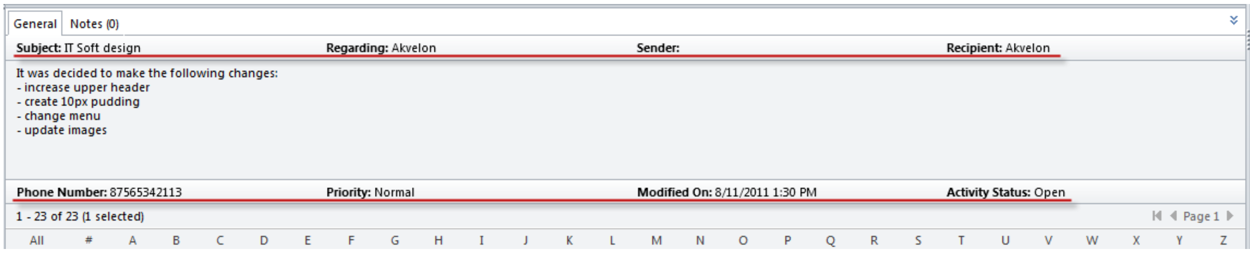


Figure 16. Entity Attributes

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). Such attributes won't be displayed on the preview pane (see Figure 17. Hidden Attributes, and compare that view with Figure 16. Entity Attributes).

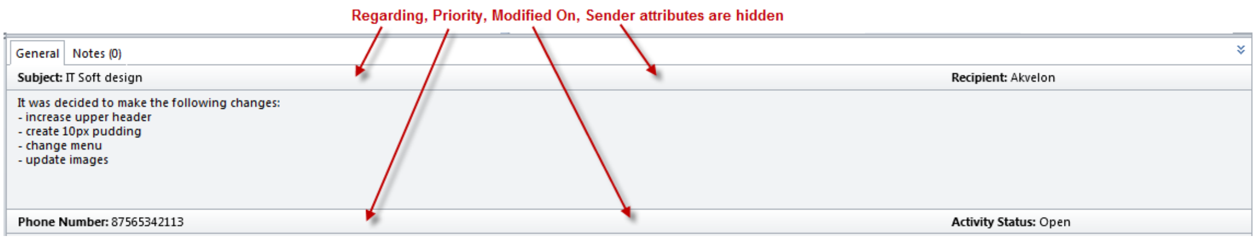


Figure 17. Hidden Attributes

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 18. Description).

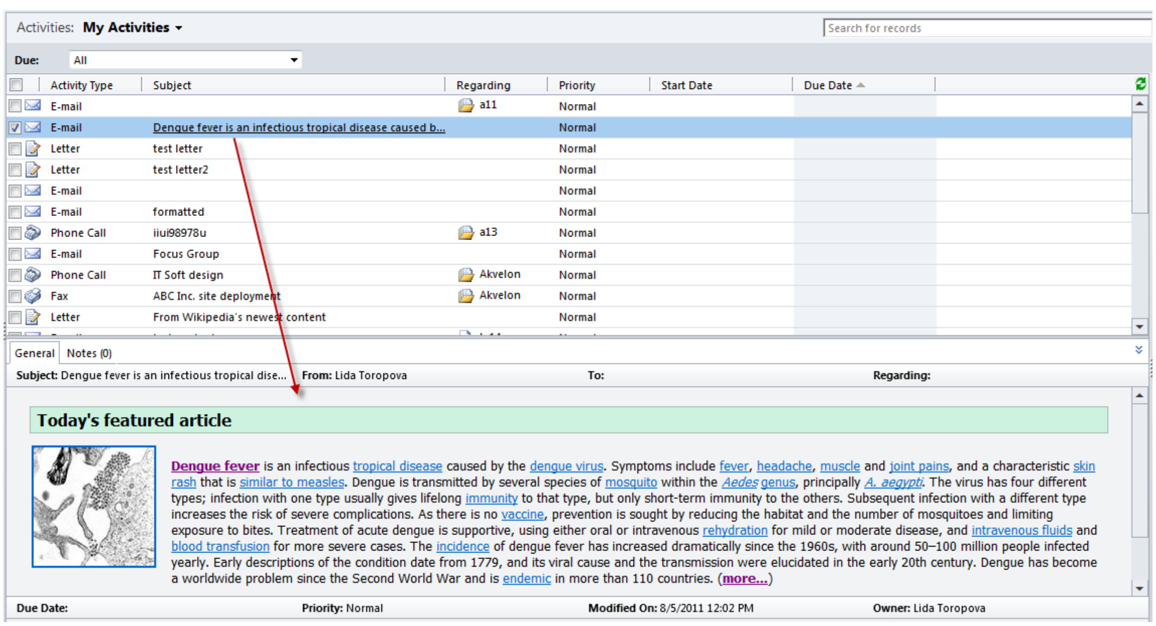


Figure 18. Description

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 19. Refresh Button).

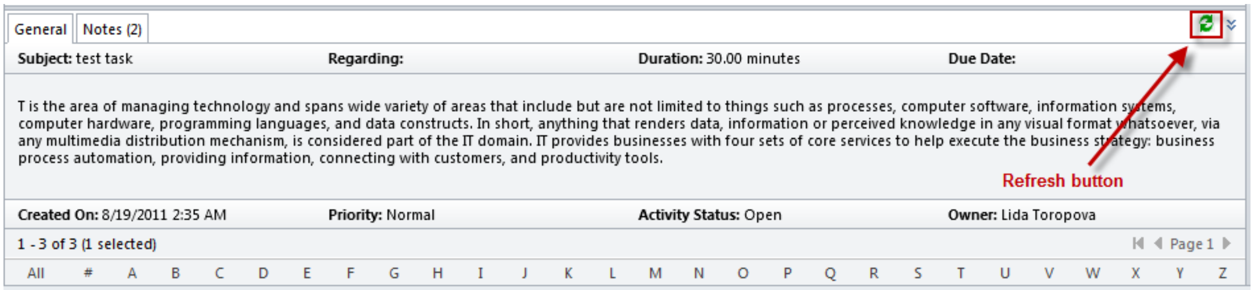


Figure 19. Refresh Button

Configuration

This section describes how to configure the Global Preview roles, entities, and attributes displayed in the Preview Pane.

Global Preview User Permissions

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

1. Go to **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 the user to the appropriate role:

   - 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.
4. After you assign a role, click the **OK** button (see Figure 20. User Roles).

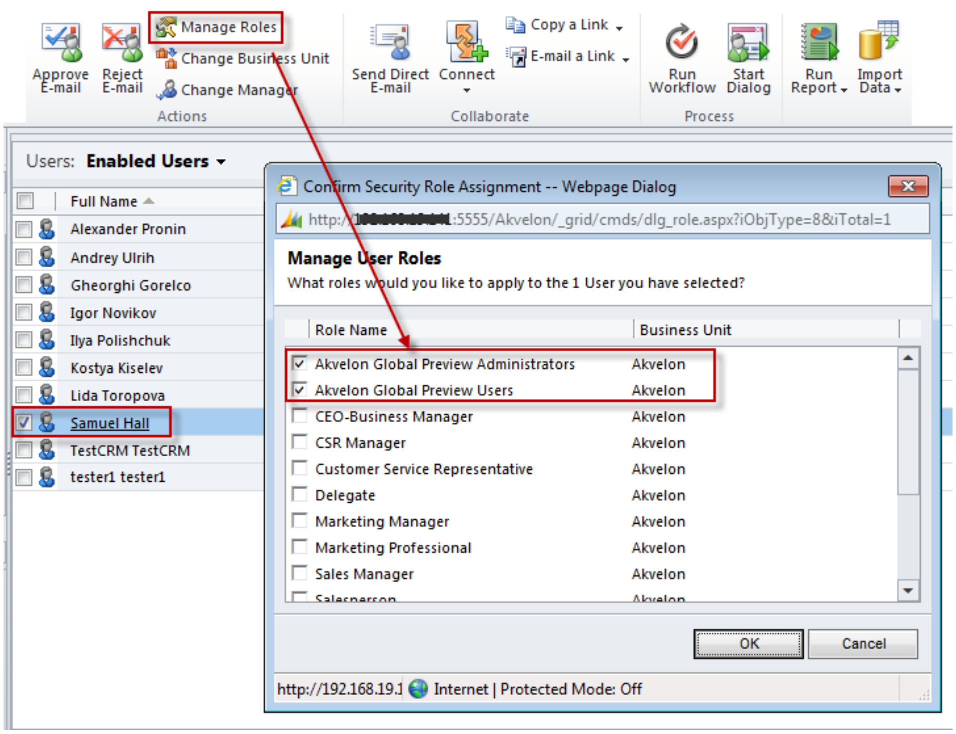
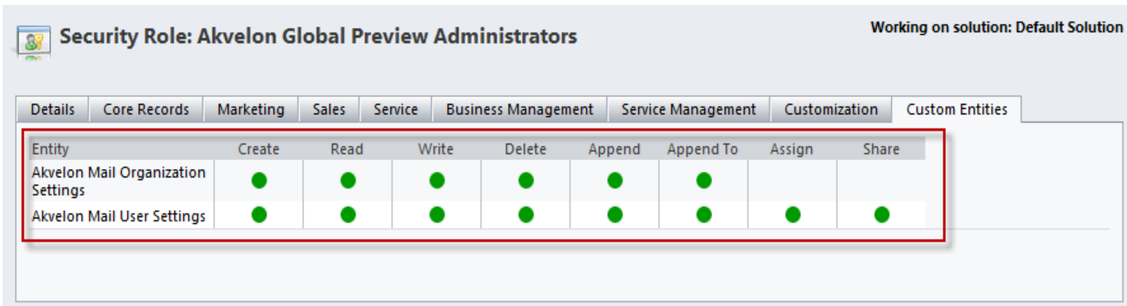


Figure 20. User Roles

Please note:

1. **Akvelon Global Preview Administrators** and **Akvelon Global Preview Users** roles should have organization level privileges for **Akvelon Mail Organization Settings** and **Akvelon Mail User Settings** entities (see Figure 21. Akvelon Mail Privileges).



Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Akvelon Mail Organization Settings	●	●	●	●	●	●		
Akvelon Mail User Settings	●	●	●	●	●	●	●	●

Figure 21. Akvelon Mail Privileges

2. The **Akvelon Global Preview Administrators** role provides the selected user with rights to manage THEIR OWN Settings.

3. The **Akvelon Global Preview Administrators** role doesn't provide the selected user with rights to Activate/Deactivate or Update the Global Preview license or with rights to enable/disable Email Indexing. One needs to have a “System Administrator” role to be allowed to do that.

4. **Akvelon Global Preview Administrators** – doesn't influence number of Global Preview licenses. **Akvelon Global Preview Users** – influences number of Global Preview licenses.

For example: you purchased 10 Global Preview licenses, and you have **2** users with the **Akvelon Global Preview Administrators** role, and **4** users with the **Akvelon Global Preview Users** role **– only 4 licenses are being used in this case. 6 licenses are available for additional Global Preview users.**

Switching Preview Pane On/Off for Entities

You can select entities to display the Preview Pane according to your business needs.

To switch on/off Preview Pane for entities do the following (see Figure 22. Manage Entities)**:**

1. Open **Settings >** click on the **Global Preview Settings**.
2. Press the **Manage Entities** button.
3. In the **Entities Manager dialog** that opens:

   - **check** 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**.

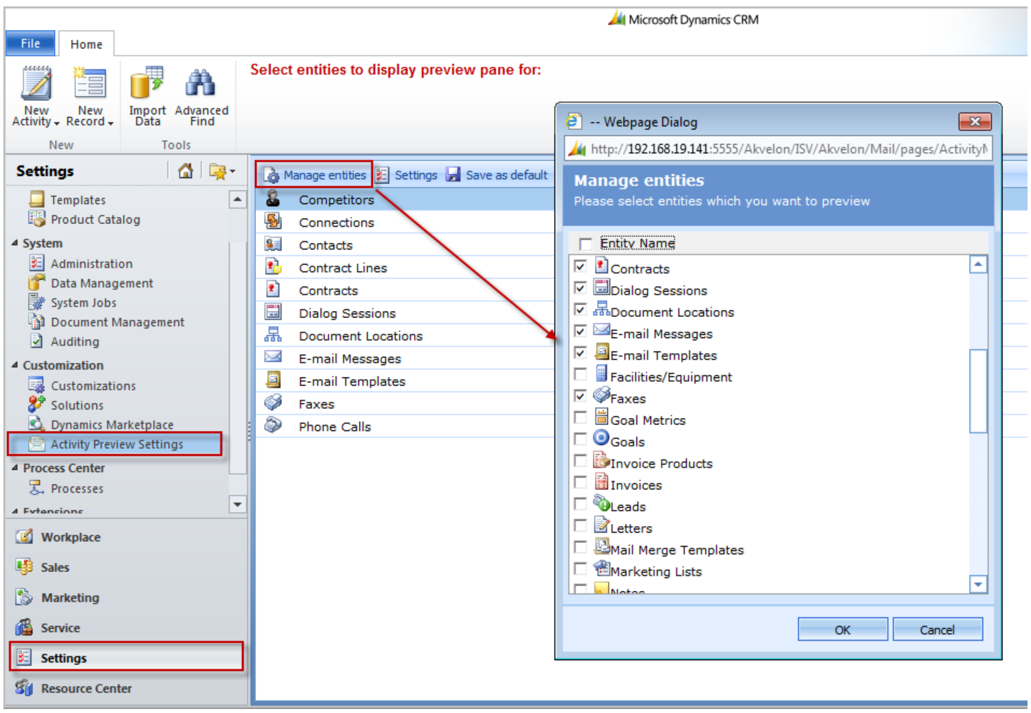


Figure 22. Manage Entities

Custom Entities: If you added a custom entity and can't find it in the **Entities Manager** dialog box – perform the deactivation/activation process to let Global Preview know about this new entity.

To Switch Off (hide) Preview Pane for all entities (see Figure 23. Entity Name)**:**

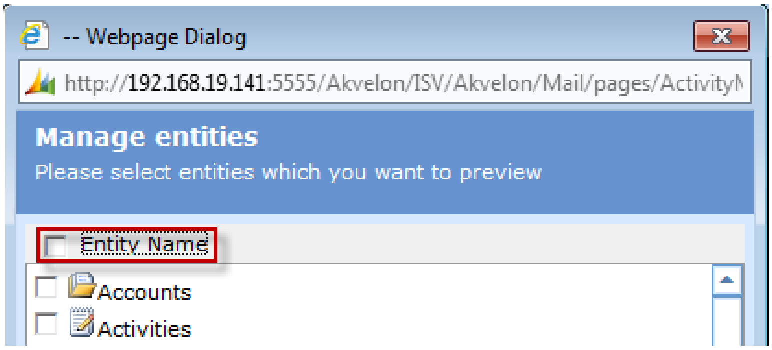


Figure 23. Entity Name

1. In the **Entities Manager** dialog box: find the **Entity Name** check box.
2. If the **Entity Name** check box is checked – uncheck it.
3. If the **Entity Name** check box is not checked, but there are entities checked in the list – check the **Entity Name** check box so that all entities are selected, then uncheck it to switch off preview pane for all entities at once.
4. Press **Ok**.

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 24. Entity Settings)**:**

1. Open **Settings >** click on **Global Preview Settings**.
2. Double click on the entity to configure.
3. In the **Entities Manager** dialog that opens:

   - 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**.

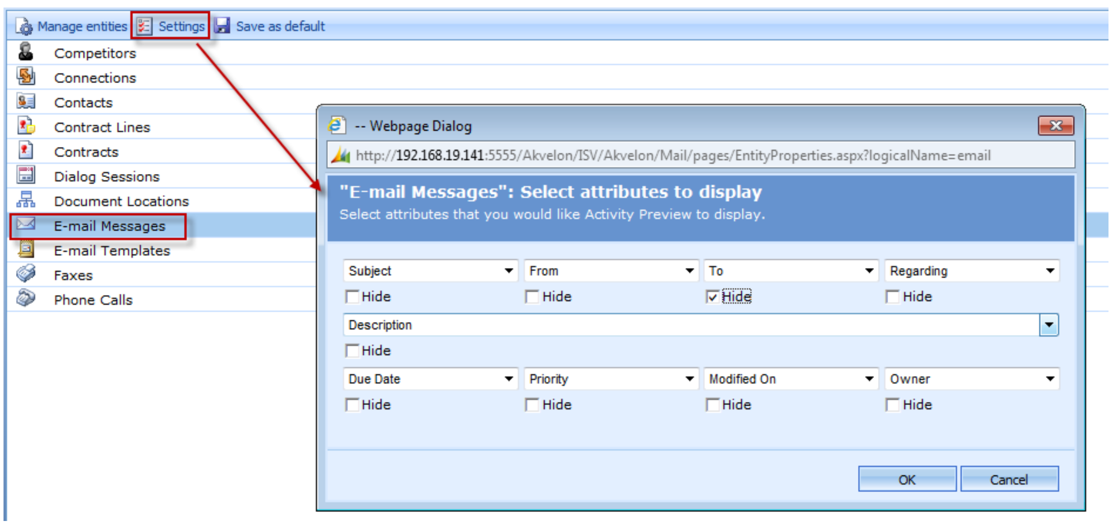


Figure 24. Entity Settings

Note: Global Preview won't allow you to hide all fields (attributes) – at least one should be selected (see Figure 25. Hide All Fields).

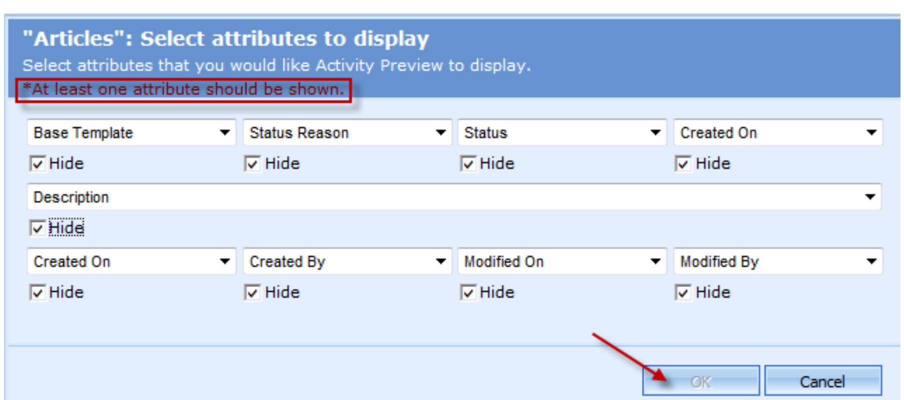


Figure 25. Hide All Fields

Save as Default Settings

By default, Global Preview configurations that you set will be applied only to your user account, other users will have their own configurations.

If you want your configurations to be applied to all CRM users you should press the **Save as default** button (see Figure 26. Save as default button).

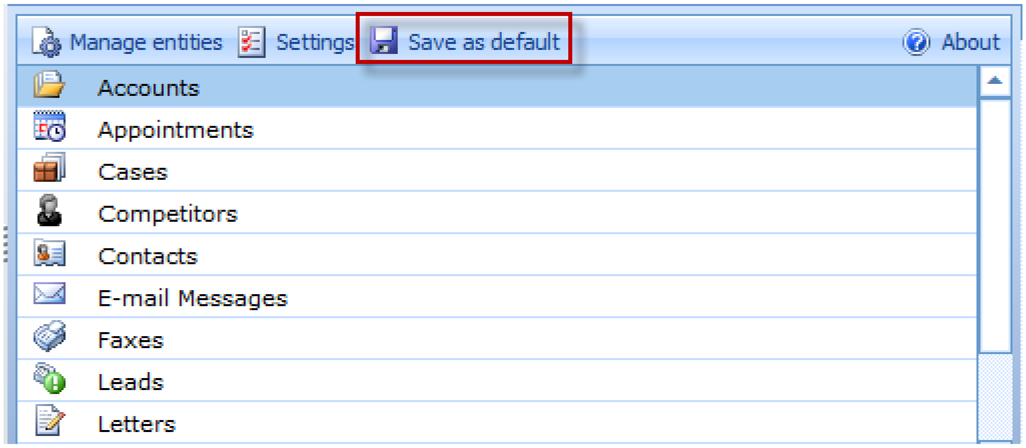
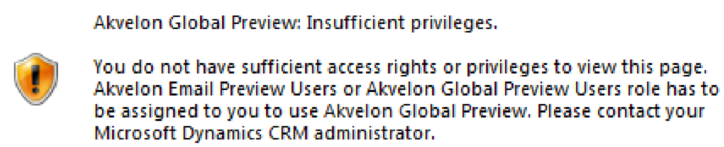


Figure 26. Save as default button

Troubleshooting

Issue	Solution
When installing Global Preview, you get an error: “The source was not found, but some or all event logs could not be searched. To create the source, you need permission to real all event logs to make sure that the new source is unique. Inaccessible logs: Security.”	Right click on **GlobalPreview-x64.msi** and select **Troubleshoot Compatibility** item. Then press **Start the program…** button in the dialog appeared.
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 **Global Preview Installation** section.
Preview Pane doesn’t appear for a selected entity.	Verify that this entity is selected in Global Preview Settings, see the **Switching Preview Pane On/Off for Entities** 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 **Configuring Entity Attributes** 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, see the **Save as Default Settings** section.
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 **Switching Preview Pane On/Off for Entities** section.
You updated an Attachment or Note, but Preview Pane displays the old information.	Press the refresh button to update Preview Pane.
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:	Verify you’ve assigned Global Preview roles to this user, see **Global Preview User Permissions** 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 **Global Preview User Permissions** section.

Feedback

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

AKVELON

Creativity, Quality, Consistency