



DYNAMICS 365 APP FOR OUTLOOK

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ABOUT ENCLOUD₉

Dynamics 365 Cloud Customer Relationship Management – Silver 2014 - present

12 years experience working with small to mid sized businesses to modernize sales, marketing customer service

Work with companies throughout the US and Canada

Primary focus is on Cloud-based Dynamics 365 Customer Engagement Platform

Microsoft
Partner

Silver Cloud Customer Relationship Management
Silver Small and Midmarket Cloud Solutions

ADD-IN VS APP

- Two Applications now exist to integrate Outlook with Dynamics 365
 - Add-In for Outlook
 - Dynamics 365 App for Outlook
- **Dynamics 365 Add-in for Outlook**
 - Track and Set Regarding emails, Appointments, Tasks
 - Create New Records
 - View and Edit CRM Data from Mailbox Area
 - Older Technology – COM App
 - Needs to be installed on each computer
 - Frequently deactivates itself with no notification!
 - Can only be used on one computer for tracking emails, tasks, appointments, and contacts
 - No mobile device support
 - Very Clicky!
 - **Dynamics 365 App for Outlook**
 - Track and Set Regarding emails, Appointments
 - Respects tracking settings in defined in Personal Settings
 - Create New Records
 - View and Edit CRM Data from Mailbox Area
 - Web App – One install for Organization – roll down to eligible users
 - Works on Desktop, Laptop, Mobile, Tablet
 - **Automatic Resolution** to contacts lead and account records
 - **One Click** Set Regarding
 - **Category Tracking** makes Tracked records visible in Outlook

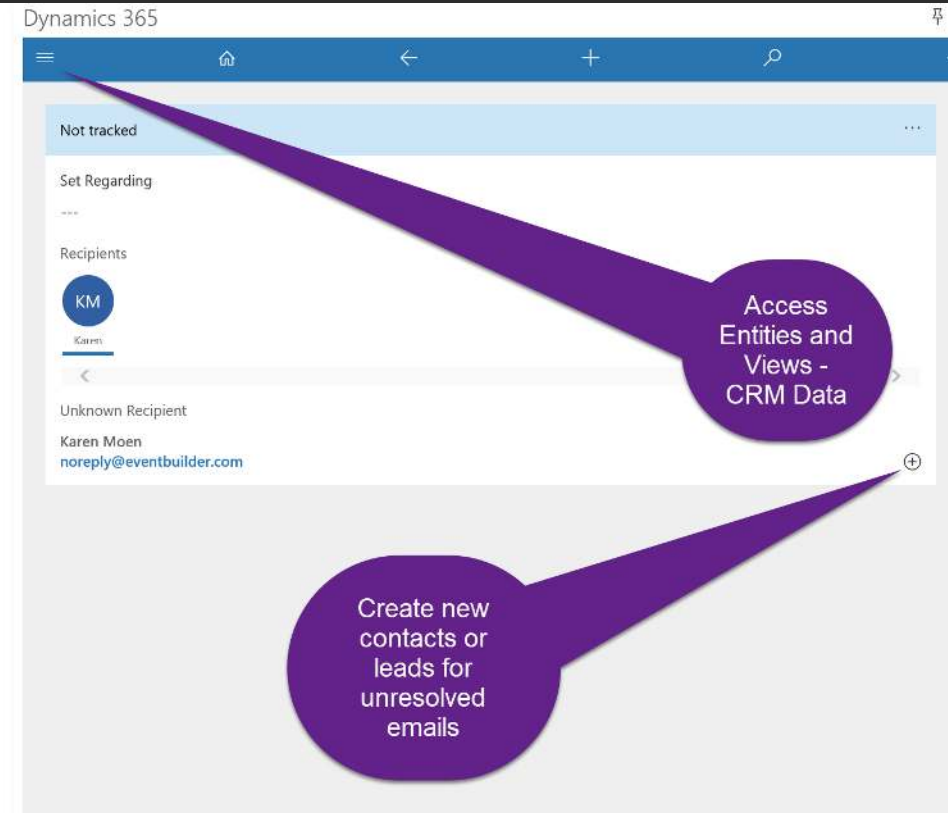
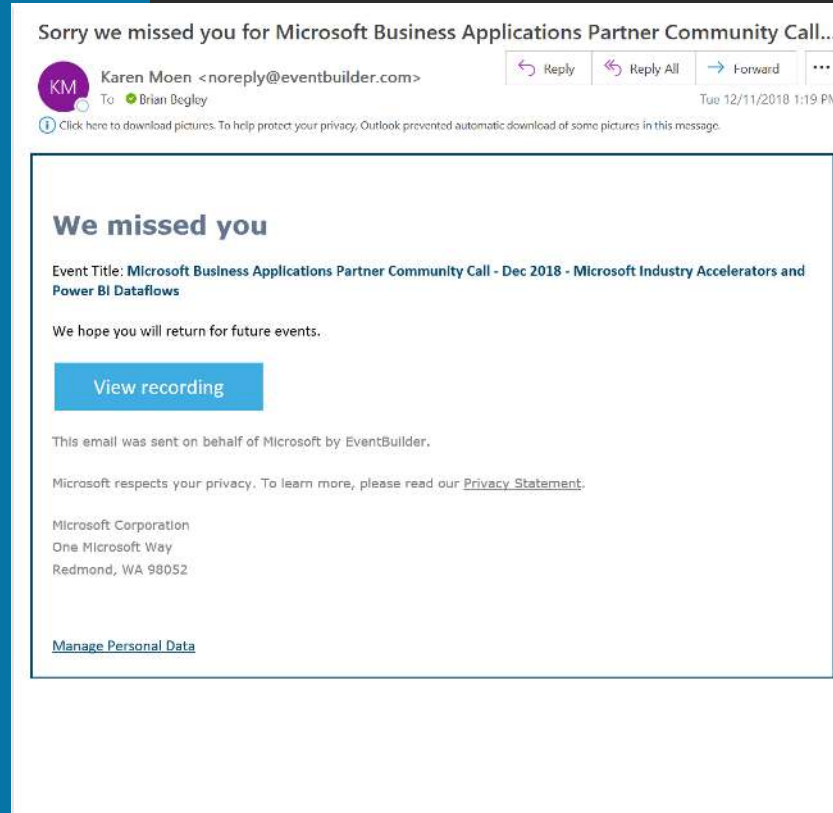
PREREQS

- Best Experience is using Office 365
- Works with On Premise and Hybrid scenarios
- Users mailboxes Must use **Server Side Sync**
- Approve, Test and Enable each mailbox
- Enable the App for Outlook in Settings
- Add App to Outlook for Users

The screenshot shows the 'Mailbox : Information' configuration page in Microsoft Dynamics 365. The page is titled 'Mailbox Brian Begley' and includes a warning banner about data sharing. The configuration is organized into sections: 'Configuration Test Results', 'General', and 'Notes'. The 'Configuration Test Results' section shows 'Incoming Email Status' and 'Outgoing Email Status' both set to 'Success', with a 'Mailbox Test Completed On' date of 11/2/2018 at 9:04 AM. The 'General' section includes fields for 'Name' (Brian Begley), 'Owner' (Brian Begley), 'Email Address', 'Regarding' (Brian Begley), 'Is Forward Mailbox' (No), 'Allow to Use Credentials for Email Processing' (Yes), 'User Name', 'Password', 'Synchronization Method' (Microsoft Exchange Online), and 'Incoming/Outgoing Email' settings (Server-Side Synchronization or Email Router).

EMAIL

- App automatically resolves email address to Lead, Contact or Account
- Panel displays related records – cases, opportunities, etc.
- One Click Tracking and set regarding by clicking the link icon
- Unresolved emails can be created as a lead or contact on tracking (using Quick Create forms)
- Once tracked, new related records and activities can be created
- Uses email templates, KB Articles and Sales Literature
- Follows personal settings



APPOINTMENTS

- Open Appointment from Calendar
- Uses same tracking process as email tracking
- Tracked meetings show in selected Category color
- Cant track appointments made by other Dynamics 365 users

The screenshot displays the Microsoft Outlook 'Meeting' ribbon with the following details:

- Title:** Outlook App Webinar
- Required:** James I. [redacted]
- Optional:** [empty]
- Start time:** Wed 12/12/2018, 2:00 PM. Includes checkboxes for 'All day' and 'Time zones'.
- End time:** Wed 12/12/2018, 3:00 PM. Includes a 'Make Recurring' button.
- Location:** [empty]

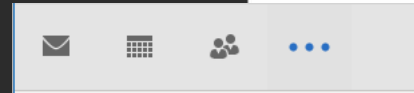
The ribbon includes various tabs: File, Meeting, Scheduling Assistant, Tracking, Insert, Format Text, Review, and Help. The 'Meeting' tab is active, showing options like 'Cancel Meeting', 'Forward', 'Skype Meeting', 'Teams Meeting', 'Meeting Notes', 'Contact Attendees', 'Address Book', 'Check Names', 'Response Options', 'Show As: Busy', 'Reminder: 10 minutes', 'Recurrence', 'Categorize', 'Private', 'High Importance', 'Low Importance', 'Dictate', and 'Dynamics 365'.

On the right side, a 'Dynamics 365' sidebar is visible, showing a list of attendees for the meeting:

- Track pending...
- Lead JAMES BEGLEY (with contact info: begley co, dad, etc.)
- Attendees: JAMES (with contact info: begley co, dad, etc.)

CONTACTS

- Contacts are tracked through an addin – not from the Contact List
- View Outlook Contacts that are not tracked against Dynamics 365 Contacts
- Update tracked contacts with parent account

The screenshot shows the Dynamics 365 Outlook interface. The top ribbon includes 'File', 'Dynamics 365', 'Add-ins', and 'Help'. The 'Dynamics 365' ribbon has 'Tracking' (Track, Untrack, Link) and 'Create' (Email, Appointment) groups. The main area is titled 'Outlook Contacts Dynamics 365 Contacts' and shows a dropdown menu for 'Untracked Contacts'. Below this is a table of contacts.

<input type="checkbox"/>	Tracked	Full Name	Title
<input type="checkbox"/>	Not Tracked	Alex	Projet Ma
<input type="checkbox"/>	Not Tracked	Anton	Manager
<input type="checkbox"/>	Not Tracked	Brad	Executive
<input type="checkbox"/>	Not Tracked	David	Chief Cor
<input type="checkbox"/>	Not Tracked	Eli Ga	Wellness
<input type="checkbox"/>	Not Tracked	Jason	It
<input type="checkbox"/>	Not Tracked	Karla	Wellness
<input type="checkbox"/>	Not Tracked	Keith	Informati
<input type="checkbox"/>	Not Tracked	Kimb	Logistics
<input type="checkbox"/>	Not Tracked	Mattl	Wellness
<input type="checkbox"/>	Not Tracked	Shella	Toxicolog
<input type="checkbox"/>	Not Tracked	Steven Forsyth	VP Oper

WORKING WITH CRM DATA

- Full CRM UI functionality available throughout
 - Views, Records
- Shrink and Expand window to view more data
- Pin the App to keep it open when working
- Edit Site Map to add additional entities

The screenshot displays the Outlook interface on the left and the Dynamics 365 interface on the right. The Outlook window shows an email from Todd Collins at Rockne Construction, Inc. with an attached invoice statement. The Dynamics 365 window shows a lead record for Bob Webinar, currently in the 'Quality (1 Hrs)' stage. The lead details include contact information, business phone, mobile phone, email, and address. A 'Budget Amount' of 38500 is shown with a green progress indicator, and the lead is marked as a 'Good Fit' with a 'Yes' rating. A map of the lead's location is visible in the bottom right corner of the Dynamics 365 window.

CUSTOMIZING THE APP

- Customize the site map through Dynamics 365 Customization Tool
- Model-Driven App – “Dynamics 365 App for Outlook”
- Add and Remove Entities
 - Custom entities
 - Select Views and forms
- Edit Site Map
 - Keep Dashboards as first item on Site Map

The screenshot displays the PowerApps customization tool interface. The top navigation bar includes 'File', 'Save and Close', 'Show Dependencies', 'Export Solution', 'Translations', 'Publish All Customizations', and 'Actions'. The main area is titled 'Solution: Default Solution' and 'Model-driven Apps'. A left-hand navigation pane lists various components like 'Entities', 'Option Sets', 'Web Resources', 'Processes', 'Plug-in Assemblies', etc. The main pane shows a table of Model-driven Apps with columns for 'Display Name', 'Name', 'Type', 'State', 'Customizable...', and 'Description'. The 'Dynamics 365 App for Outlook' is highlighted with a red box. The status bar at the bottom indicates 'Status: Existing' and '1 - 9 of 9 (0 selected)'.

Display Name	Name	Type	State	Customizable...	Description
ClickDimensions	cdi_clickdimensions	Model-driven App	Managed		Marketing Automation
CRM Hub	CRMHub	Model-driven App	Managed		Mobile app that provides core CRM functionality...
Customer Service Hub	Customerservicehub	Model-driven App	Managed		A focused, interactive experience for managing y...
Dynamics 365 App for Outlook	AppforOutlookModule	Model-driven App	Managed		Provides access to Dynamics 365 App for Outloo...
Dynamics 365 Portals	Dynamics365Portals	Model-driven App	Managed		Configure and manage your online platform to c...
Project Resource Hub	msdyn_TimeExpense	Model-driven App	Managed		Project Resource Hub Module
Project Service Automation	projectservice	Model-driven App	Managed		Engage customers and deliver billable projects o...
Sales Hub	msdynce_saleshub	Model-driven App	Managed		Modernize the sales experience with this mobile...
Voice of the Customer	msdynce_voc	Model-driven App	Managed		Provides Voice of the Customer capabilities usin...

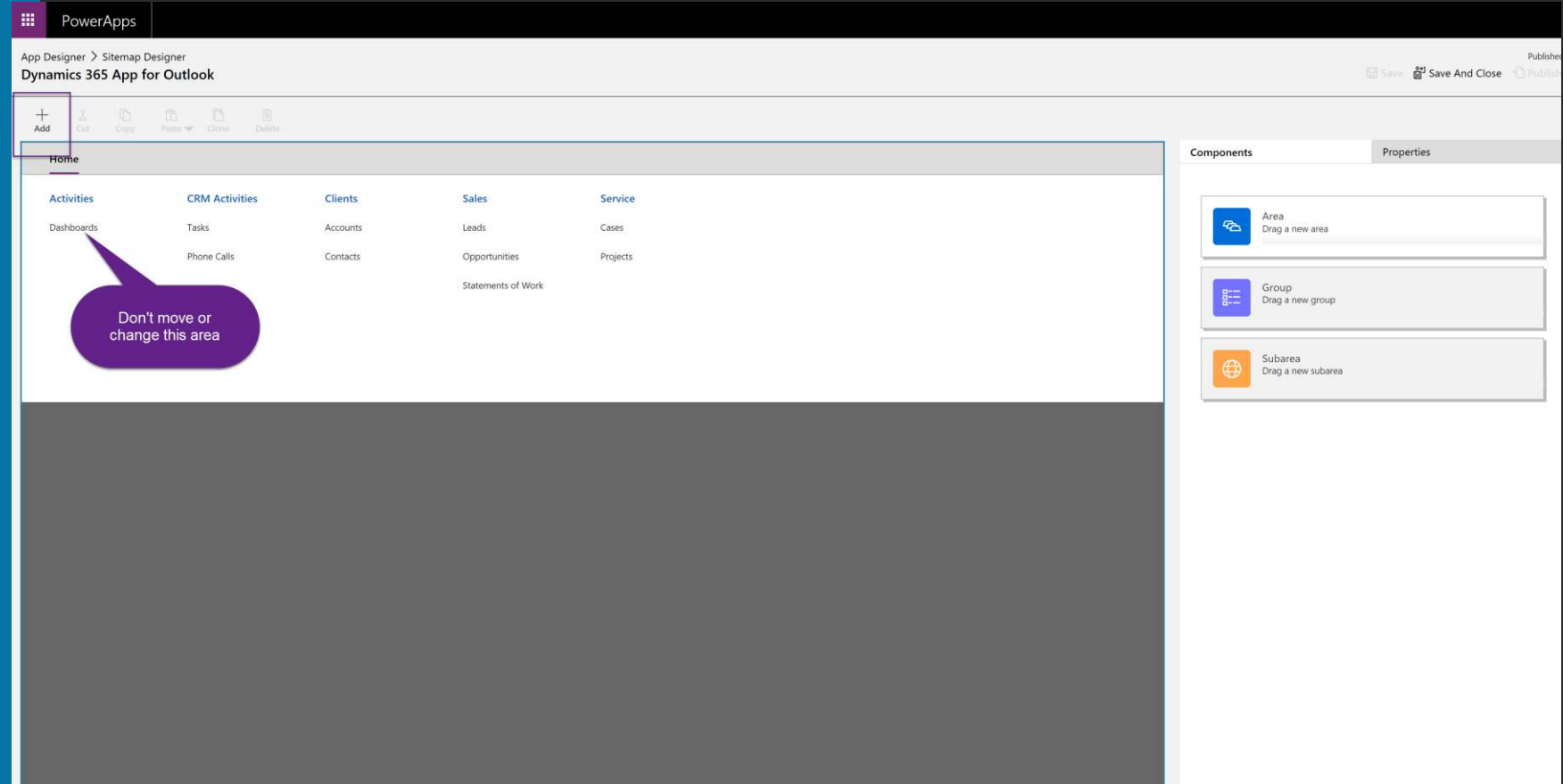
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The screenshot displays the PowerApps App Designer interface for a Dynamics 365 App for Outlook. The main canvas shows a site map with a grid of components. The components are organized into sections: Site Map, Dashboards (3), Business Process Flows (Business Proces...), and Entity View (18). The Entity View section contains a grid of components for each entity: Account, Activity, Appointment, Campaign, Case, Competitor, and Connection. Each entity has associated Forms, Views, Charts, and Dashboards. The right-hand side of the interface shows a Components panel with Artifacts and Entity Assets. The Artifacts section includes Entities, Dashboards, and Business Process Flow. The Entity Assets section includes Forms, Views, Charts, and Dashboards.

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RESOURCES

- [Questions?](mailto:support@encloudg.com) Contact us at support@encloudg.com
- [enCloudg events](https://encloudg.com/about-encloudg/events/) - encloudg.com/about-encloudg/events/
 - 12/19/18 – Building PowerApps and Hubs for Dynamics 365
- [Aaron Richards 8 Part Series on Outlook App](https://blogs.msdn.microsoft.com/crminthefield/)
<https://blogs.msdn.microsoft.com/crminthefield/>
- [October 2018 Release Notes](https://docs.microsoft.com/en-us/dynamics365/customer-engagement/outlook-app/overview) - <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/outlook-app/overview>
- [Category based tracking](https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/use-outlook-category-track-appointments-emails) <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/use-outlook-category-track-appointments-emails>
- [Microsoft Community Site](https://community.dynamics.com/) - <https://community.dynamics.com/>
- [Brian Begley](mailto:bbegley@encloudg.com) – bbegley @ encloudg.com
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