DYNAMICS 365 APP FOR OUTLOOK

Presented by Brian Begley – www.encloud9.com

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
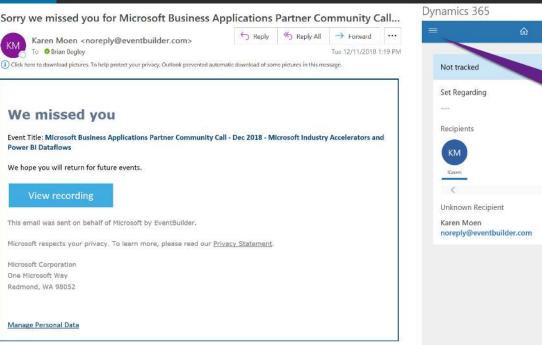
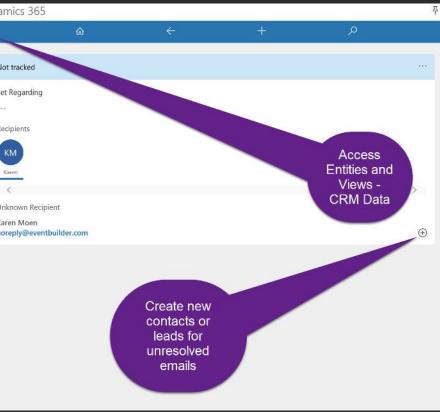- Add App to Outlook for Users

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EMAIL

- App **automatically** resolves email address to Lead, Contact or Account

- Paneldisplays 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

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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

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

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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

CUSTOMIZING THE APP

- Customize the site map though 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
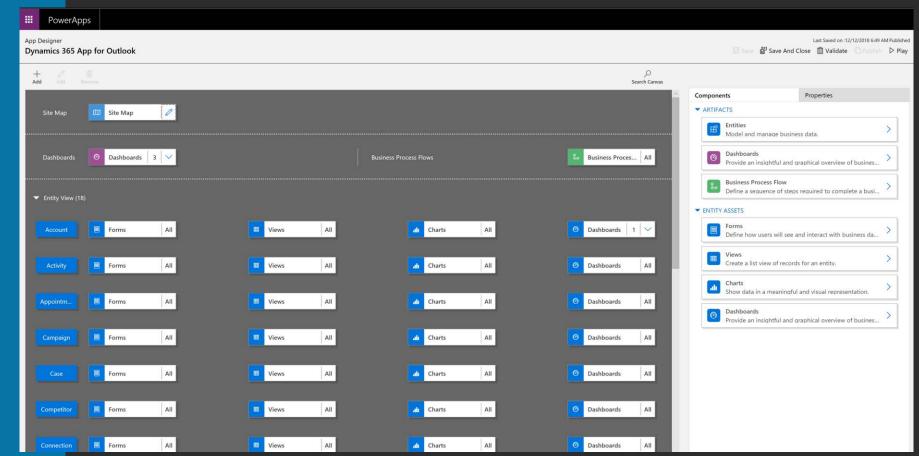 - Keep Dashboards as first item on Site Map

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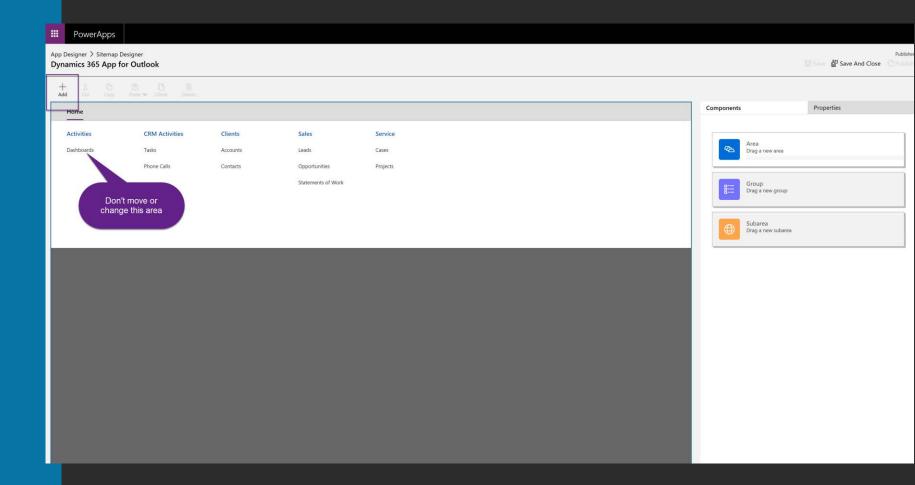 - Keep Dashboards as first item on Site Map

RESOURCES

- Questions? Contact us at support@encloud9.com

- enCloud9 events - encloud9.com/about-encloud9/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/

- October 2018 Release Notes - 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

- Microsoft Community Site - https://community.dynamics.com/

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