

# DYNAMICS 365 APP FOR OUTLOOK

Presented by Brian Begley – [www.encloudg.com](http://www.encloudg.com)



## ABOUT ENCLOUD<sub>9</sub>

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

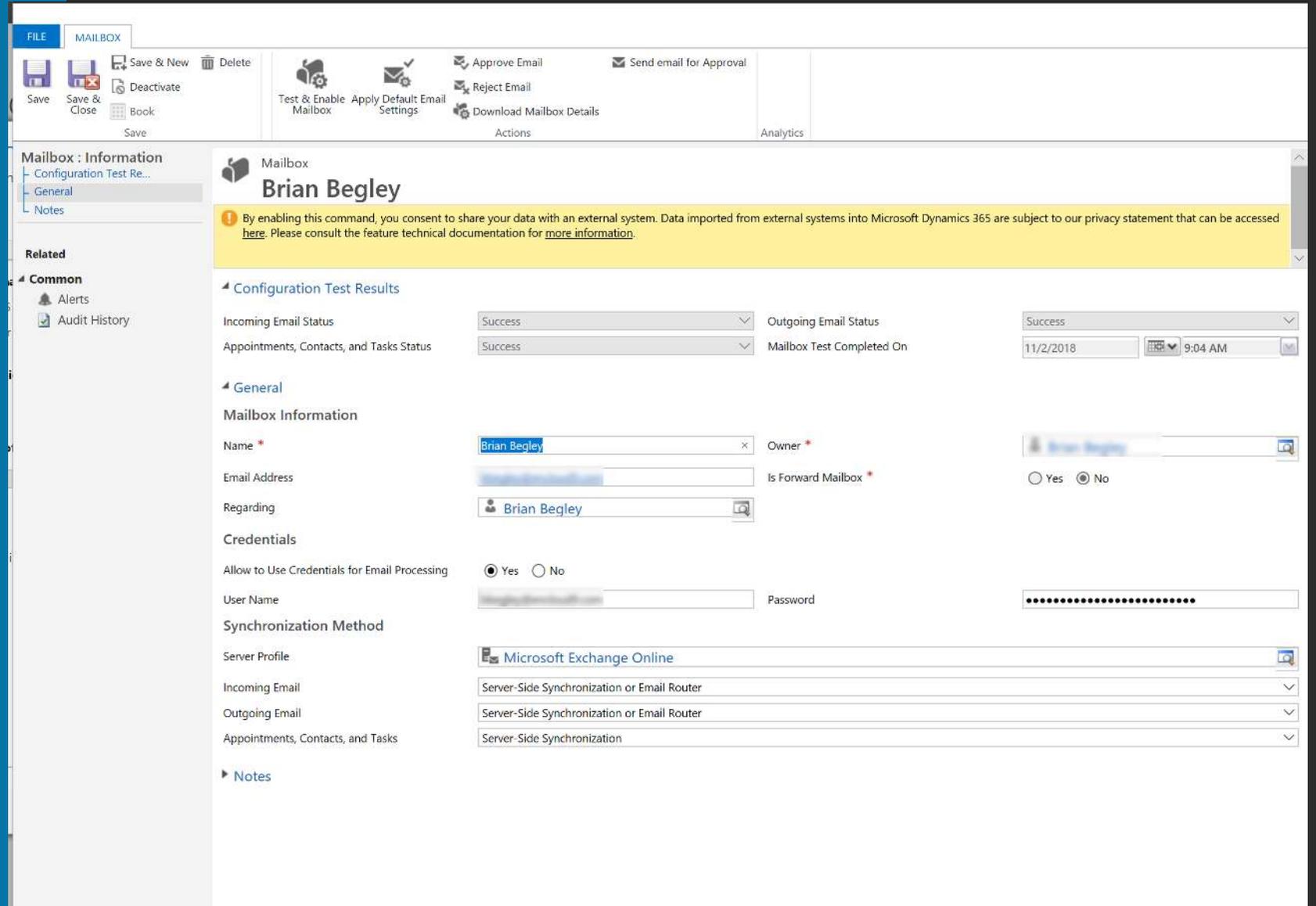
Silver Cloud Customer Relationship Management  
Silver Small and Midmarket Cloud Solutions

# 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

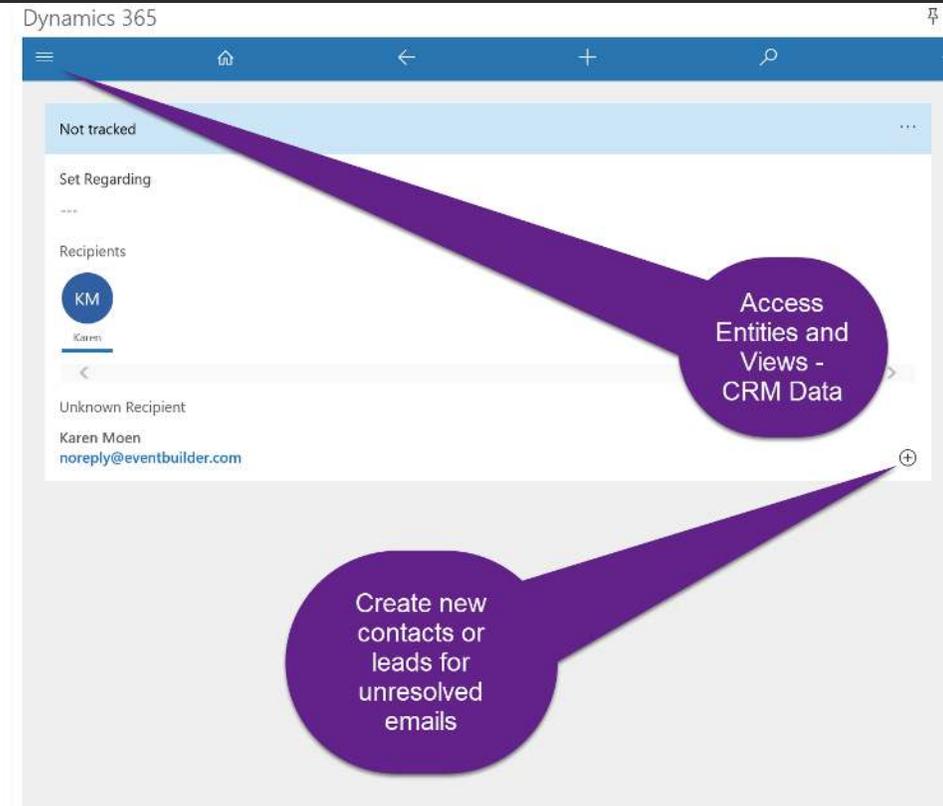
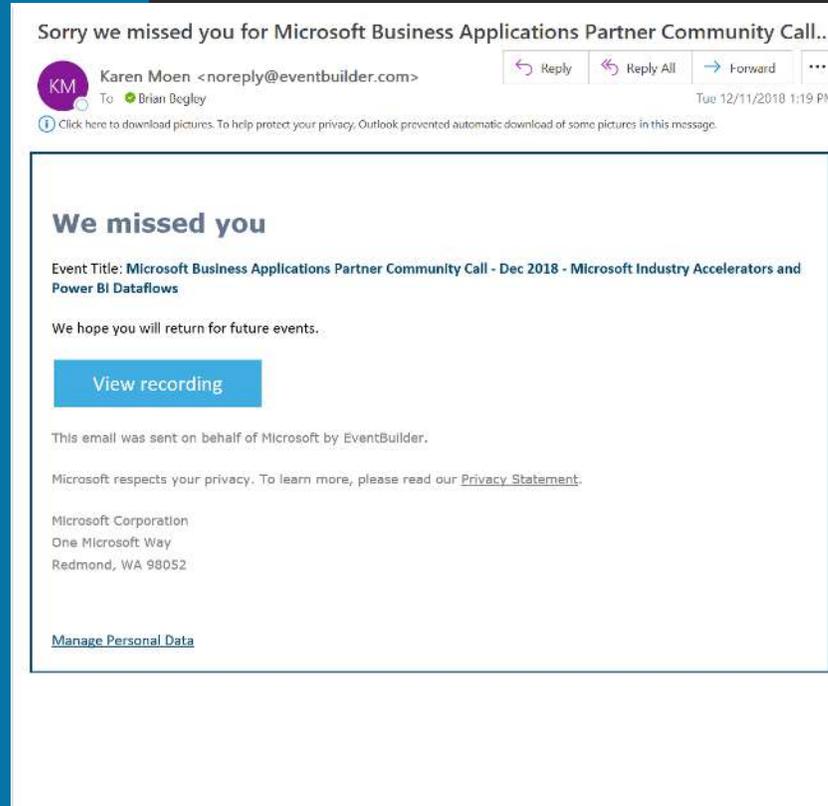
# PREREQS

- 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



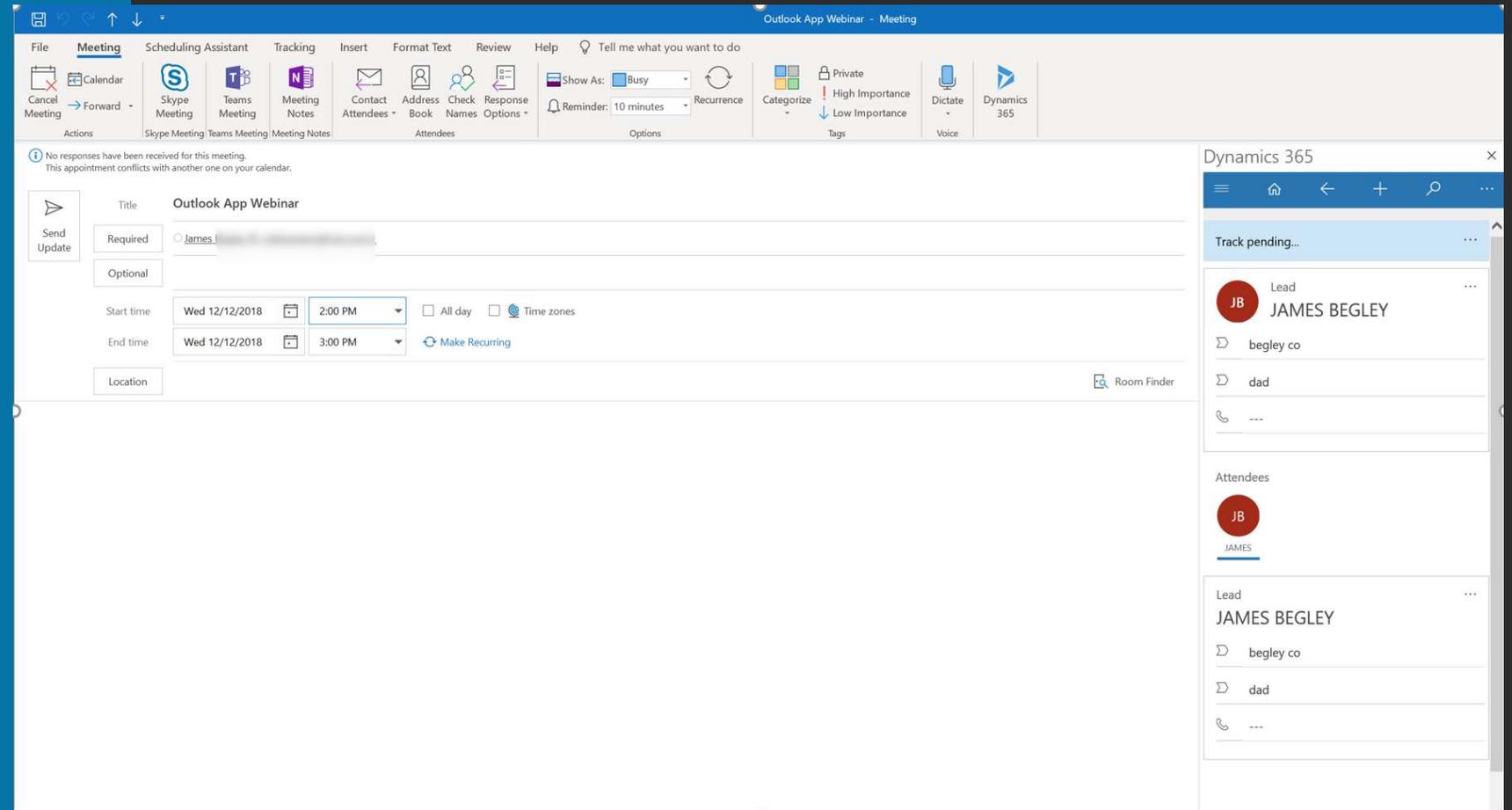
# EMAIL

- 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



# 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 for 'Untracked Contacts'. Below 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 CRM 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 record includes contact information, a business phone number, a mobile phone number, an email address, and a street address. A map view is also visible at the bottom right of the Dynamics 365 interface.

# 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 shows the PowerApps interface for a 'Default Solution'. The 'Model-driven Apps' section is active, displaying a list of components. The 'Dynamics 365 App for Outlook' component is highlighted with a purple border. The table below lists the components:

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...
<b>Dynamics 365 App for Outlook</b>	<b>AppforOutlookModule</b>	<b>Model-driven App</b>	<b>Managed</b>		<b>Provides access to Dynamics 365 App for Outloo...</b>
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...

At the bottom of the table, it shows '1 - 9 of 9 (0 selected)' and 'Page 1'.

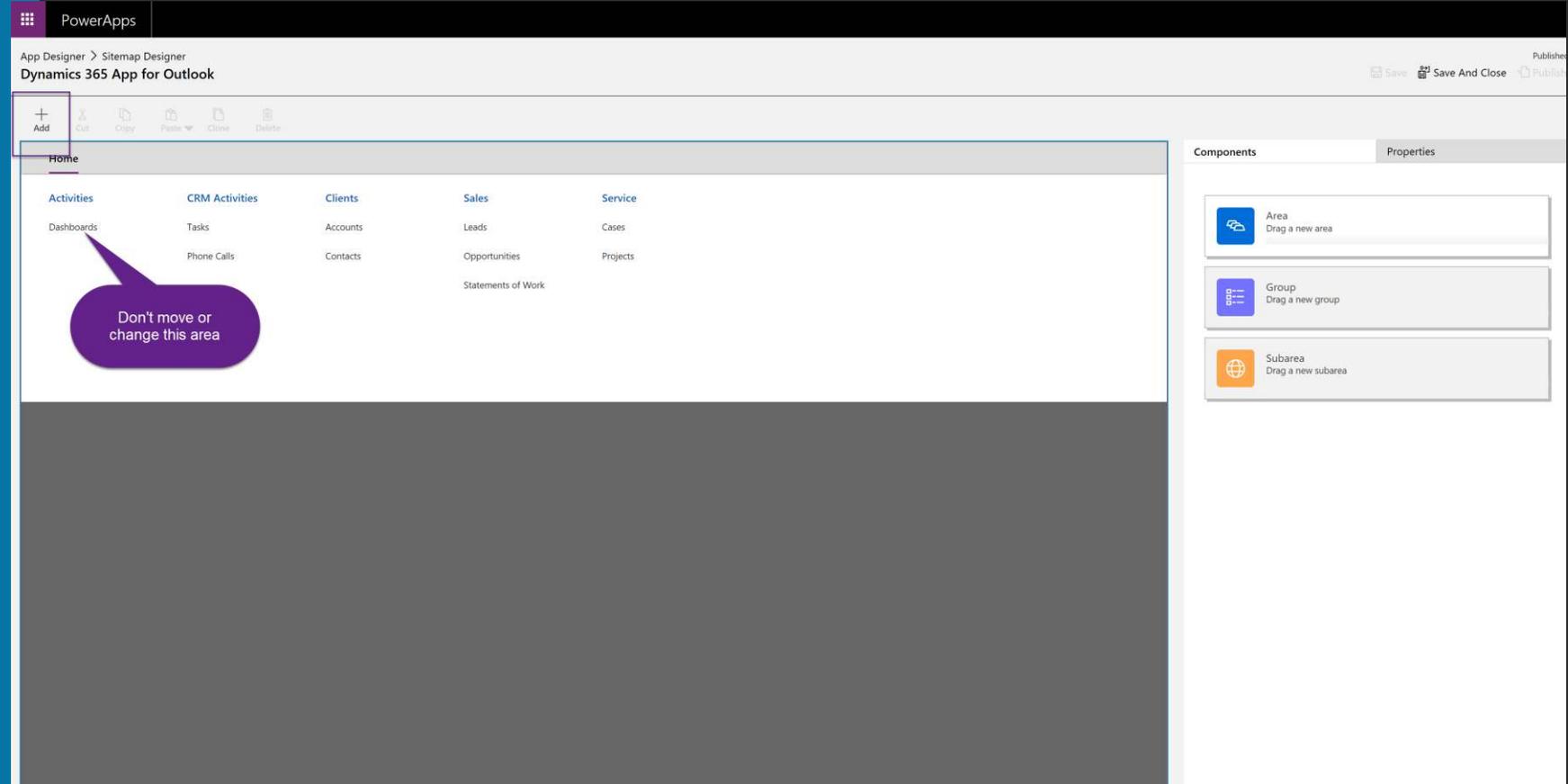
# CUSTOMIZING THE APP

- 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 App Designer interface for a Dynamics 365 App for Outlook. The main canvas shows a Site Map at the top, followed by a Dashboards section with 3 items, and an Entity View (18) section. The Entity View section contains a grid of components for various entities, including Account, Activity, Appointment, Campaign, Case, Competitor, and Connection. Each entity has options for Forms, Views, Charts, and Dashboards. The right-hand pane shows Components and Properties, with Artifacts and Entity Assets listed.

# 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



# 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
- [LinkedIn](https://www.linkedin.com/in/brianbegleydynamicscrm) [linkedin.com/in/brianbegleydynamicscrm](https://www.linkedin.com/in/brianbegleydynamicscrm)