

DYNAMICS 365 APP FOR OUTLOOK

Presented by Brian Begley – www.encloud9.com



ABOUT ENCLOUD9

Microsoft Partner

Silver Cloud Customer Relationship Management Silver Small and Midmarket Cloud Solutions 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

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
- Approve, Test and Enable each mailbox
- Enable the App for Outlook in Settings
- Add App to Outlook for Users

FILE MAILBOX				
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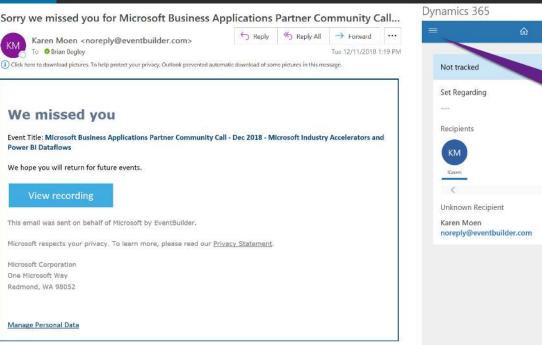
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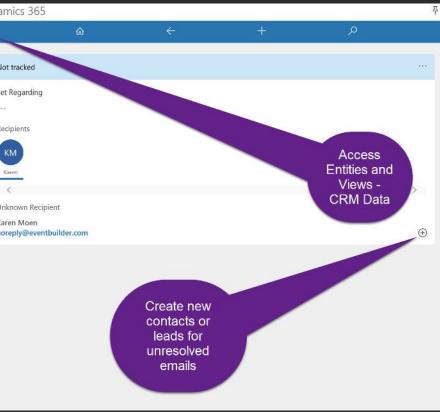




EMAIL

- 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



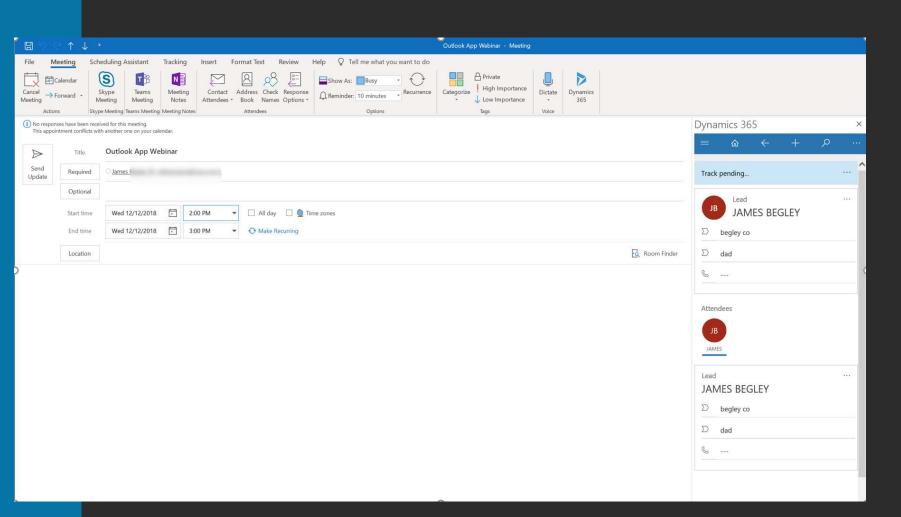




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APPOINTMENTS

- 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

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- 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

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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

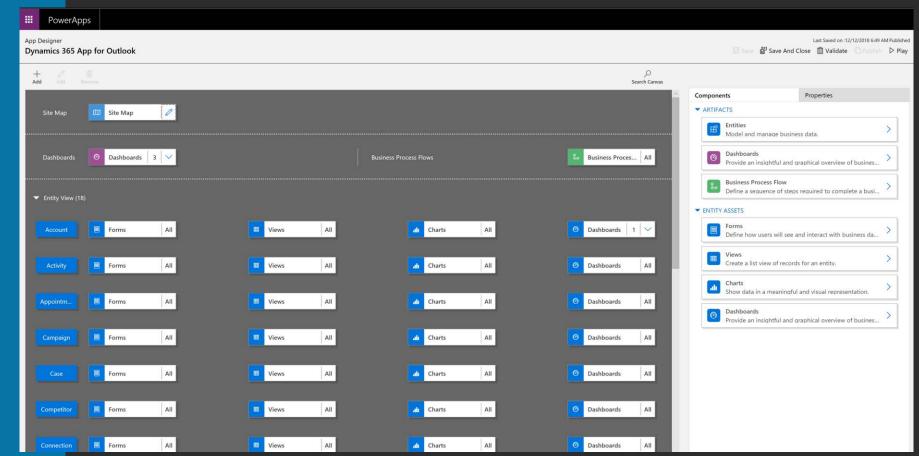
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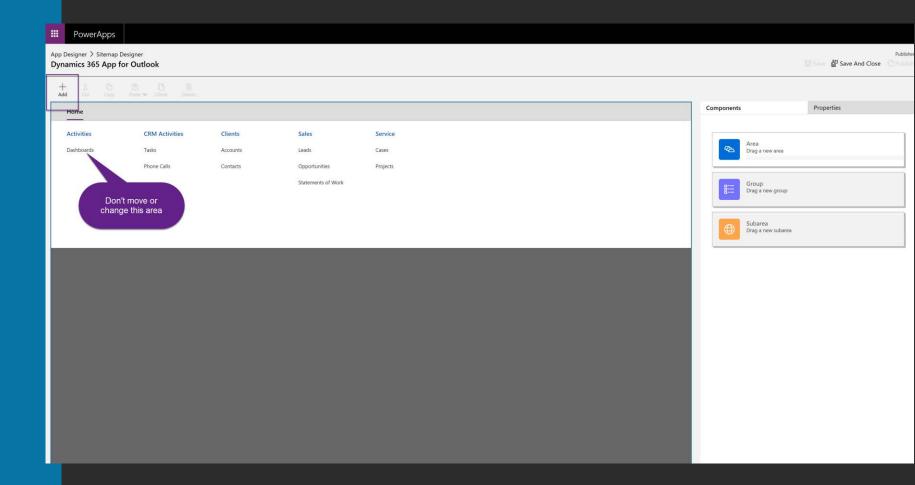




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RESOURCES

- Questions? Contact us at support@encloud9.com
- 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/
- October 2018 Release Notes <u>https://docs.microsoft.com/en-us/dynamics365/customer-engagement/outlook-app/overview</u>
- Category based tracking https://docs.microsoft.com/enus/dynamics365/customer-engagement/admin/use-outlookcategory-track-appointments-emails
- Microsoft Community Site https://community.dynamics.com/
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