

Microsoft Dynamics 365 with outlook integration

In Microsoft Dynamics 365, Users can associate E-mails with their Dynamics Instance.

E-mailing is a preferred customer channel in Dynamics 365, and it is also an effective channel for lead nurturing and other sales activities. Switching back and forth between a CRM and a contact centre or email client is time consuming and can reduce productivity, but many CRM solutions integrate with email and bring additional benefits.

Approach to achieve this requirement:

- Security Role
- E-Mail Configuration
- Add Dynamic 365 App to Outlook
- Add an account with Outlook

1. Security Role:

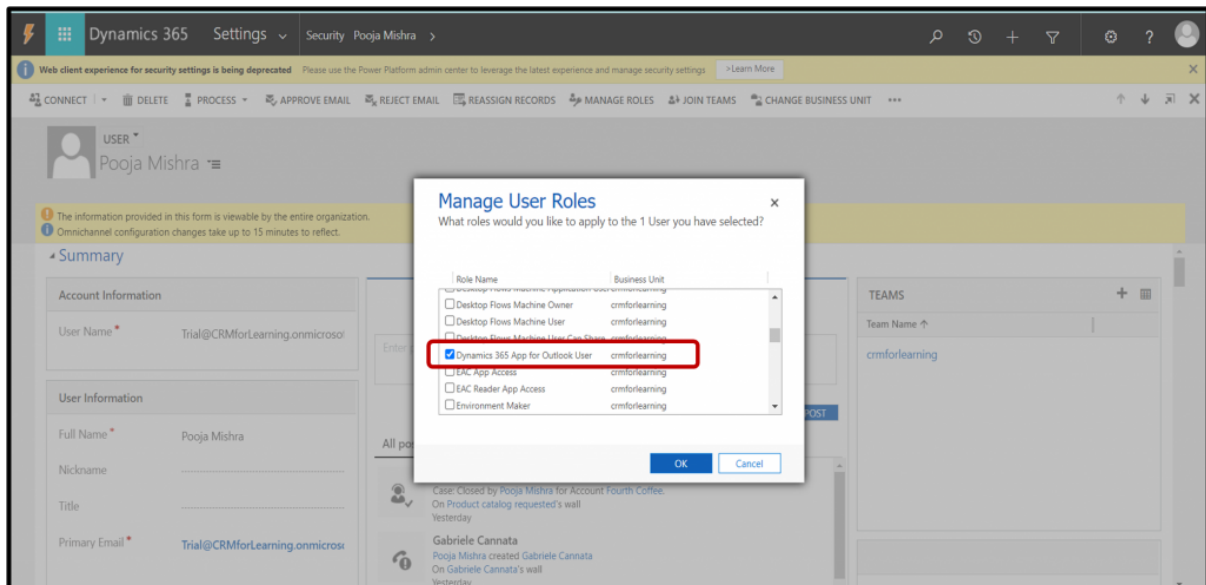
NAVIGATION STEPS:

Step 1: Navigate to Advanced Settings -> Security -> Users.

Step 2: Select the User.

Step 3: Navigate to Manage Roles.

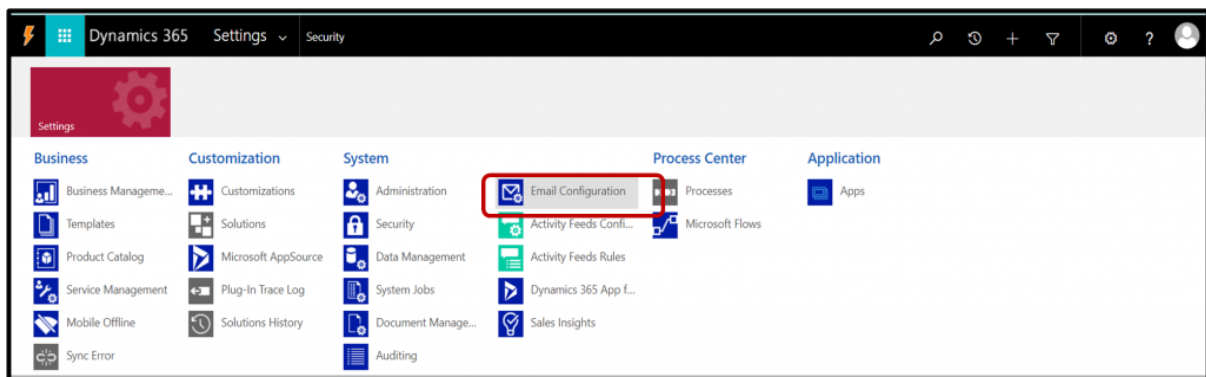
Step 4: Provide user a Security Role – Dynamics 365 App for Outlook User in your Dynamics.



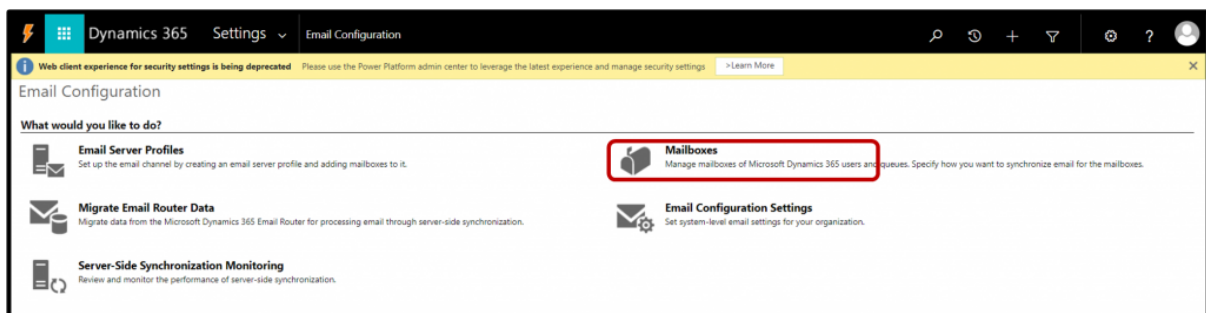
2. E-Mail Configuration:

NAVIGATION STEPS:

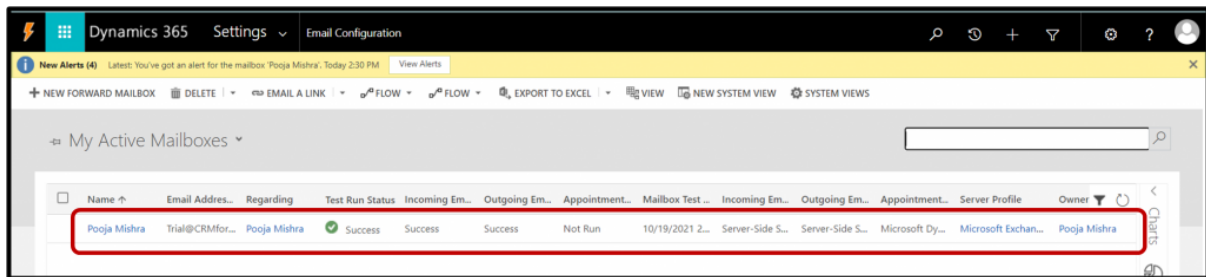
Step 1: Navigate to Advanced Settings -> Email Configuration.



Step 2: Navigate to Mailbox and open it.



Step 3: Select the required Mailbox and open it.



Step 4: Synchronization Method à Appointment, Contacts and Tasks.

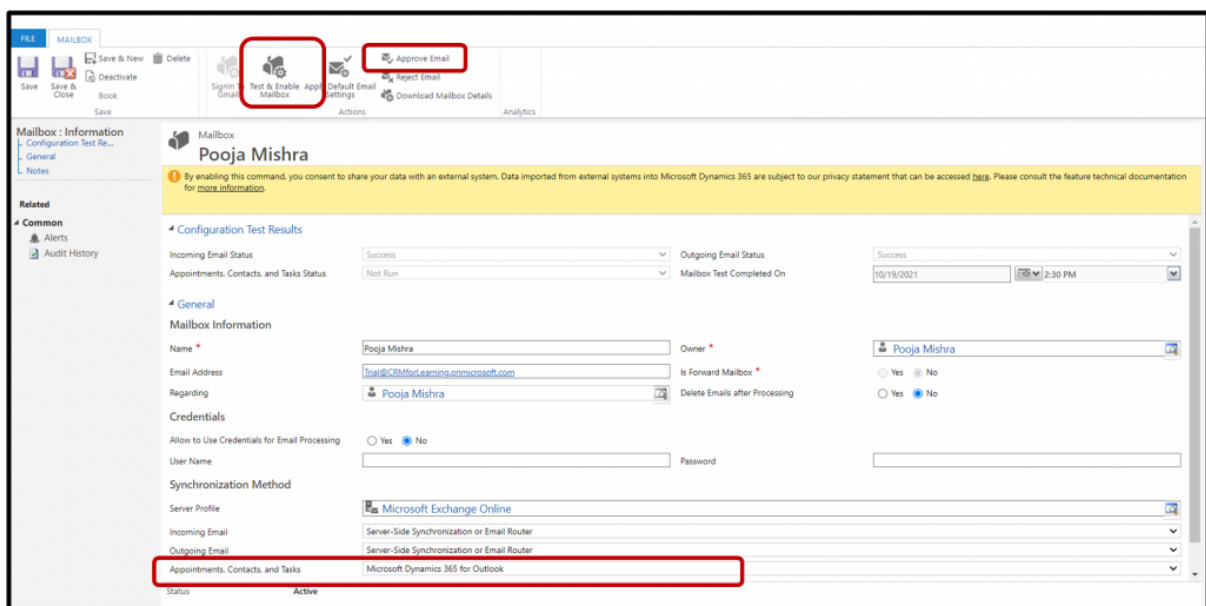
Step 5: Select MicrosoftDynamics 365 App for Outlook.

Step 6: Save the Form.

Step 7: Click on Approve Email option. A pop-up message Approve Primary Emailwill appear then click on OK.

Step 8: Click on Test & Enable Mailbox. A note will reflect, check the note, and click on OK.

Step 9: Save & Close the form.

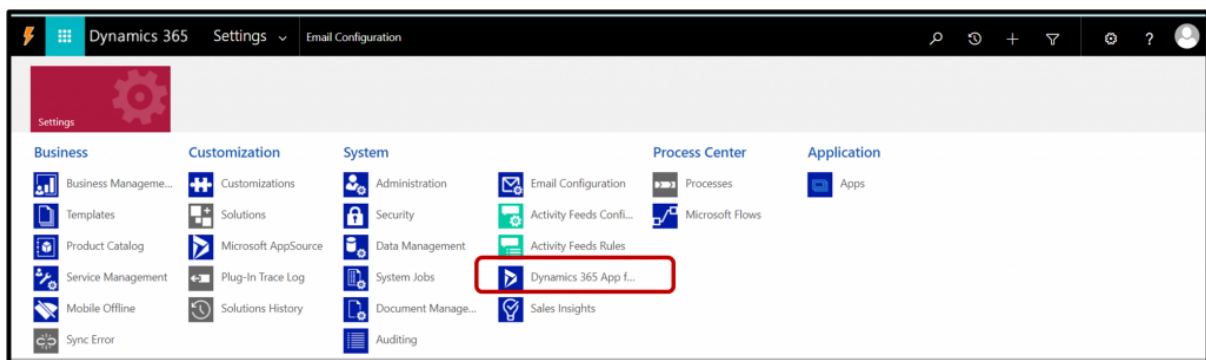
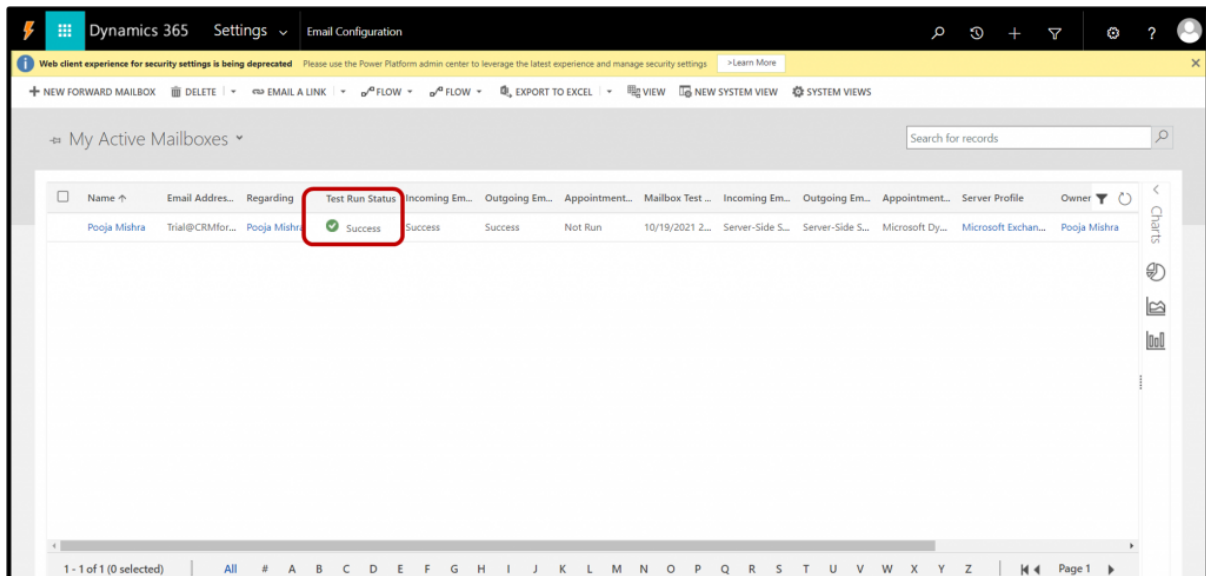


Step 10: Refresh the page and your Test Run Status will be successful.

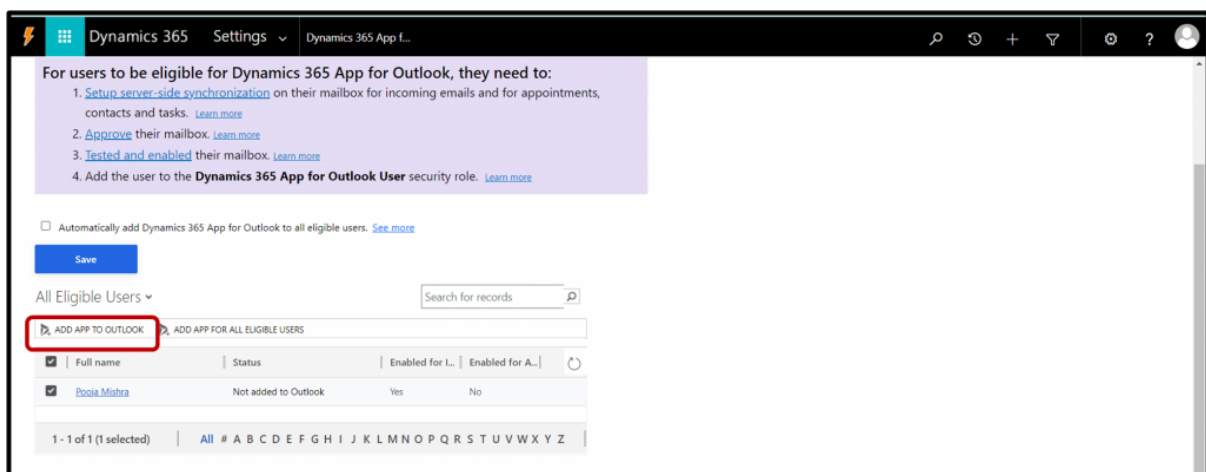
3. Add Dynamic 365 App to Outlook:

NAVIGATION STEPS:

Step 1: Navigate to Settings -> Dynamics 365 App for Outlook.



Step 2: Select the user and then click on ADD APP TO OUTLOOK.

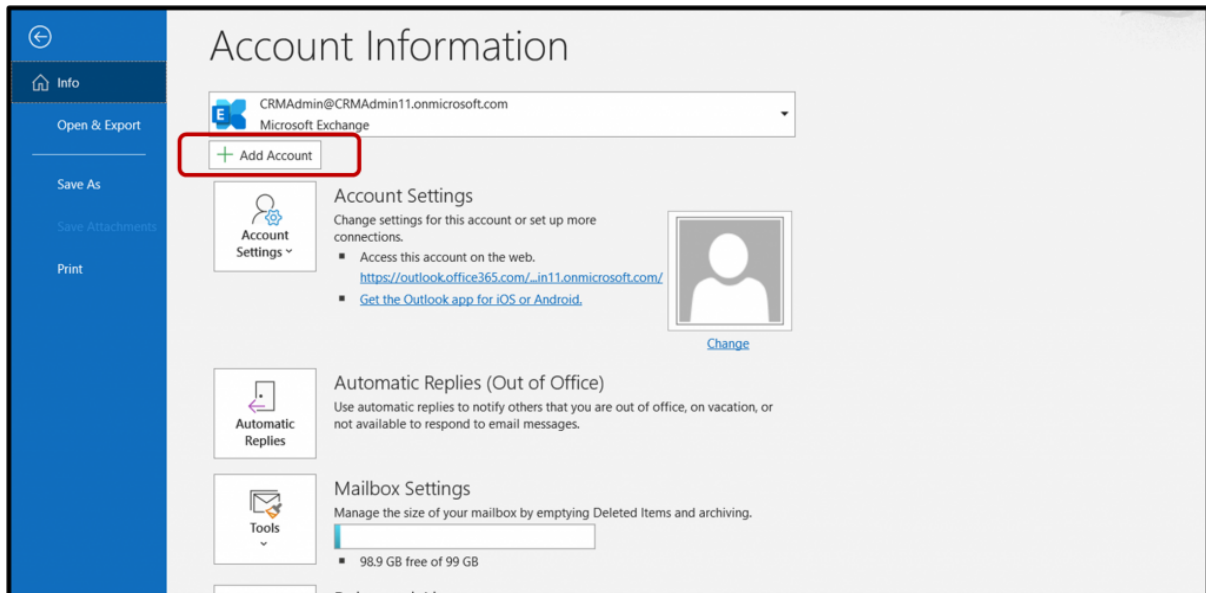


4. Add an account with Outlook:

NAVIGATION STEPS:

Step 1: Open your Outlook.

Step 2: Navigate to File à Add Account.



Step 3: Add your new Microsoft Dynamics 365 account by providing Username and password.

Step 4: Refresh Outlook and your connection is ready.