

# Introduction of Microsoft Dynamics 365 Customer Engagement

*Dynamics 365's customer engagement applications are customer focused business applications that are built on the **Microsoft Power Platform**. They are designed to help organizations more effectively engage their customers. The sales and marketing applications help identify sales prospects and turn them into long lasting relationships. Our service focused applications help your organization service your customers, whether you have a call center, service center, or are providing service in the field. Dynamics 365 customer engagement applications ensure that you have the tools necessary to fully engage your customers across all aspects of your business.*

## Why Microsoft Dynamics 365?

Microsoft Dynamics 365 is an innovative cloud-based enterprise software solution that brings ERP, CRM, and supporting business applications together as one streamlined product for a modern, simple, and unified experience. It helps run your entire business and deliver greater results by connecting products/services with people and data.

The real-time, predictive, and AI-driven insights that you derive will help you meet your business goals in sales, marketing, operations, services, and more. Microsoft Dynamics 365 is designed to provide you maximum flexibility and extensibility and can adapt to fit almost any business.

## Define customer engagement

A customer is an individual or company that receives, consumes, or buys a product or service. The primary goal of a commercial enterprise is to attract customers and maintain a strong relationship with them over-time, by ensuring they want to continue to do business with your organization.

Organizations accomplish this through customer engagement. Customer engagement represents the emotional connection between a customer and a brand.

How an organization engages their customers directly impacts their relationship with them. Highly engaged customers buy more and demonstrate more loyalty.

Many organizations leverage customer engagement software to assist them in engaging with their customers. Customer engagement applications help organizations fundamentally re-imagine how they engage customers. They help organizations create personalized marketing, sales, and service experiences using data and intelligence to improve every interaction.

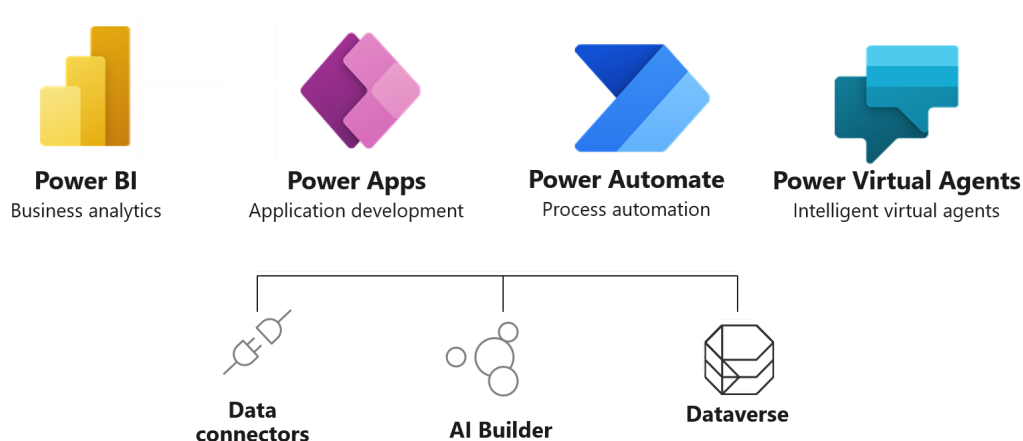
Dynamics 365's Customer engagement applications are Microsoft's first party applications built on the **Microsoft Power Platform**. Organizations can leverage these applications individually or together to create powerful end-to-end relationships with their customers.

#### Microsoft Dataverse

As mentioned previously, Dynamics 365's customer engagement applications are built on the Microsoft Power Platform. The Microsoft Power Platform is a low-code application development platform that not only spans Dynamics 365, but also Office 365, Azure, and standalone applications. It combines the power of PowerApps, Power BI, and Power Automate into one business application platform that provides quick and easy app building and data insights.

## Microsoft Power Platform

The low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications



One of the key elements to building applications on this platform is Microsoft Dataverse. Dataverse lets you securely store and manage data used by your business applications. For example, you might store all your customer data in Dataverse. Dataverse data is stored in tables. A table is a set of rows and columns. Each column in a table stores a specific type of data such as names, locations, ages, dates, salaries, and so on.

Dataverse includes a base set of standard tables that cover typical business scenarios such as accounts, contacts, and activities. The advantage to Dataverse is that organizations can also create custom tables specific to their needs and populate them with data.

For example:

- A real estate company might create tables to store the properties they sell, represent open houses, or store showings.
- A financial company might add tables to represent loan applications or bank accounts.
- An auto repair company might add tables to represent the parts they sell or the services they provide.

Application makers can use tools like Power Apps to build rich applications that leverage this data.

Leveraging Dataverse provides these benefits:

- Easy to manage: Both the metadata and data are stored in the cloud. You don't need to worry about the details of how they are stored.
- Easy to secure: Data is securely stored so users can only access what they need to. Role-based security allows you to control access to tables for different users within your organization.
- Rich metadata: Data types and relationships are used directly within Power Apps.
- Logic and validation: Define calculated columns, business rules, workflows, and business process flows to ensure data quality and drive business processes.
- Productivity tools: Tables are available within the add-ins for Microsoft Excel to increase productivity and ensure data accessibility.

Dynamics 365 first-party customer engagement applications such as Dynamics 365 Sales, Dynamics 365 Customer Service, or Dynamics 365 Marketing use Dataverse to store and secure their data. This enables you to build apps by using Power Apps and Dataverse directly against your core business data, which is already used within Dynamics 365, without the need for integration.

Examine the customer engagement apps

Dynamics 365 customer engagement applications help organizations fundamentally reimagine how they engage with customers.

Organizations can create personalized marketing, sales, and service experiences using data and intelligence to improve every interaction.

There are five core Dynamics 365 customer engagement applications:

- **Microsoft Dynamics 365 Sales:** Go beyond sales force automation to better understand customer needs, engage more effectively, and win more deals.
- **Microsoft Dynamics 365 Customer Service:** Built-in intelligence delivers faster, more personalized service and adds value to every interaction.
- **Microsoft Dynamics 365 Field Service:** Built-in intelligence helps you resolve service issues before they occur, reduce operational costs, and deliver positive on-site experiences.
- **Microsoft Dynamics 365 Project Operations:** Build trusted customer relationships and deliver outstanding project experiences by delivering profitable projects on time and within budget, while increasing employee productivity.
- **Microsoft Dynamics 365 for Marketing:** Find and nurture more sales-ready leads by moving beyond basic email marketing. Connect sales and marketing, automate processes, and make smarter decisions to maximize your marketing Return on Investment (ROI).

When used alone, each application empowers organizations to manage the daily aspects related to that item. For example, Dynamics 365 Sales helps you take control of, manage, and automate the tasks related to your sales cycle. However, when combined with Dynamics 365 Customer Service, you now have a complete solution that ensures you are providing high levels of service to your customers after they are sold. Service-related events can be used to trigger sales-related events so

sellers can get out and sell to customers. Even though each application provides a specific type of functionality, they each share common elements to provide a unified experience whether you are using them separately or together.

Work with customers and activities

Completed

As mentioned previously, a customer represents an individual or company that receives, consumes, or buys a product or service.

There are three ways organizations define customers:

- **Business-to-Business (B2B):** Customers are other businesses. For example, a business that sells and implements telecommunication equipment to hotels.
- **Business-to-Consumer (B2C):** Customers are individuals. These are businesses you likely come in contact with every day through activities such as purchasing groceries, getting a haircut, or stopping at a favorite coffee shop.
- **Hybrid:** Customers might be either businesses or individuals. For example, an automotive repair shop will certainly have customers who are individuals. Customers go there to get their oil changed, tires rotated, engines overhauled, and so on. What if that automotive business has their mechanics outsourced to organizations with fleets of trucks, buses or automobiles as well? In this example, they service both organizations, and people. Other examples might include: Software Vendors, Event Centers, Insurance Companies.

Dynamics 365 applications support all three customer models. There are two primary records used to support this functionality:

- **Account:** Represents a company or an organization that you do business with such as a customer, vendor, partner, or reseller.
- **Contact:** Represents a person. A contact can be a standalone person, or an individual at an organization.

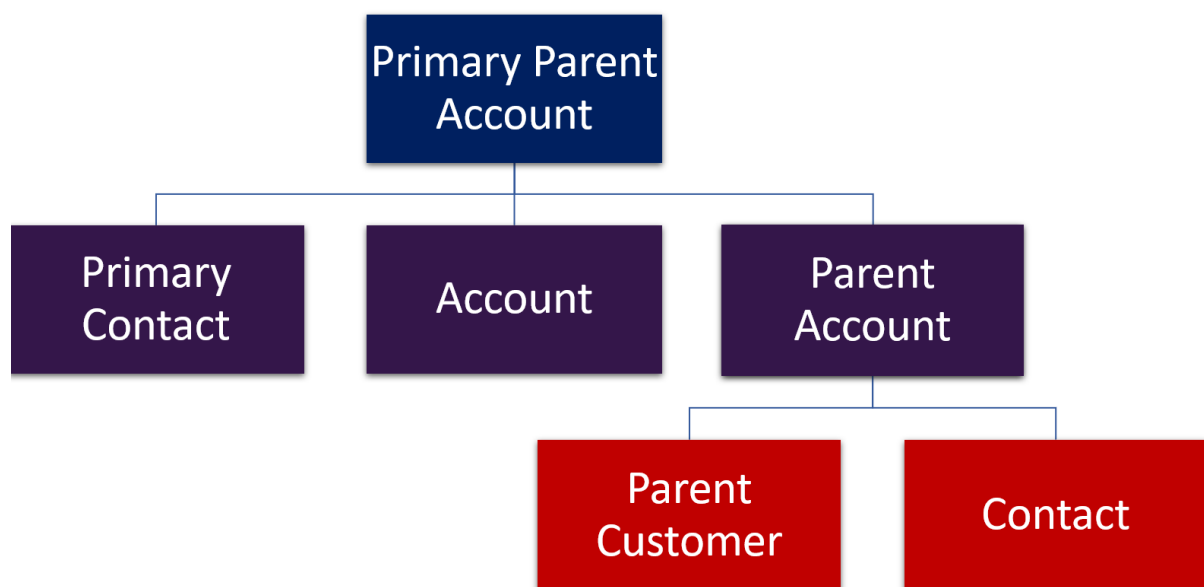
Accounts and contacts can be related to one another in various ways. Individual contacts can be associated with an account. For example, if Microsoft were an account within the Microsoft Dynamics 365 system, then the contacts might include

Bill Gates. Each contact record in Dynamics 365 includes the parent customer field that lets you link a contact to a specific account record.

While an account might have multiple contacts, it is likely that it will have a primary contact. The primary contact represents a key person at the organization that you primarily deal with. This might be the person you deal with as it relates to billing, sales, and so on.

While many accounts will be stand alone accounts, there are occasions where an account can be considered as the parent account to another account. This might occur when one account is a division or subsidiary of a parent company.

The image below shows what this might look like.



## Activities

Activities in Dynamics 365 help keep track of customer communications. For example, as you work with customers, you might do things like take notes, send email, make phone calls, set up appointments, or assign yourself tasks as you resolve a service case. By entering these activities in Dynamics 365, you will have a historic record of your communication with customers.

Activities can be filtered by date they are due as well as the Activity Type

Activity Type	Subject	Regarding	Priority	Start Date	Due Date
Email	Quote	Jason Dixon	Normal	---	---
Email	Looking to restock in inventory	Looking to restock in inve	Normal	---	---
Email	---	Jason Dixon	Normal	---	---
Phone Call	Introduction Phone Call	Counts Vong	Normal	---	---
Task	Evaluation Plan agreed upon (sample)	---	Normal	1/7/2021 4:00 AM	1/7/2021 4:00 AM
Phone Call	Likes some of our new products (sample)	---	High	1/7/2021 6:00 AM	1/7/2021 6:00 AM
Phone Call	availability of Product catalogs (sample)	---	High	1/9/2021 4:00 AM	1/9/2021 4:00 AM
Phone Call	Very likely will order from us (sample)	---	High	1/10/2021 8:00 AM	1/10/2021 8:00 AM
Task	Pain admitted by sponsor (sample)	---	Normal	1/10/2021 4:00 PM	1/10/2021 4:00 PM

Activities are often associated with contacts and accounts but, depending on the Dynamics 365 application you are using, they can also be associated with other types of records.

- In sales scenarios, activities might be added to records like leads, opportunities, or quotes.
- In service scenarios, activities might be added to records like cases, work orders, or projects.

As your organization's relationship with a customer builds over time, you and other people on your team can look through the record time-line to see the history of your interactions.

The Timeline displays all activities related to the current record in chronological order.

CONTACT INFORMATION

First Name: Jason

Last Name: Dixon

Job Title: CEO

Account Name: Fabrikam, Inc.

Email: dbormann@far.midco.net

Business Phone: 701 555-1234

Mobile Phone: 701 555-13652

Fax: ---

Preferred Method of Contact: Any

Address 1: Street 1

Timeline

Search timeline

Enter a note...

Auto-post on Looking to restock in inventory  
Derik Bormann won Opportunity for Contact Jason Dixon: \$39,650.00. Con...  
1/10/2021 1:21 PM

Opportunity Completed by  
\$39,650.00  
Closed Opportunity: Looking to restock in inventory  
1/10/2021 1:21 PM

Quote closed by  
Quote Won (Won) - QUO-01000-T8C7K7  
1/10/2021 1:21 PM

Email from 1  
Looking to restock in inventory CRM:0001001  
Here is that Quote Jason.  
[Print quote for customer.pdf](#)  
1/10/2021 1:20 PM

Closed

No notifications or suggestions  
Check back later to see what's new and stay up to date.

Company  
Fabrikam, Inc.

Opportunities  
Looking to restock in invento...  
\$39,650.00  
1/13/2021

Cases

## **Microsoft Dynamics 365 Customer Engagement Architecture:**

Microsoft Dynamics 365 CE has a N-tier architecture which hasn't changed for a long time.

This N-tier architecture can be extended with the help of UI tools and code means developers can customize the standard CRM functionality by developing workflows, plugins and custom workflow activities.

Knowing the architecture of Dynamics 365 CE is quite important for the developers to extend/customize the application.

### **The 3 tiers ( or layers) of the Dynamics 365 CE architecture are:**

1. Web Tier
2. Application Tier
3. Data Tier

#### **Web Tier:**

Web Tier handles the web pages of the applications such as CRM entity forms, views, charts, dashboards and all other UI components. The web tier or web layer is configured on the IIS server which is responsible for the rendering of the web components.



**Application Tier:**

Application tier manages the business logic of the application such as plugin, processes, security and data elements. The access to the application layer is controlled through the web services, means to access any of these components the user has to be authenticated.

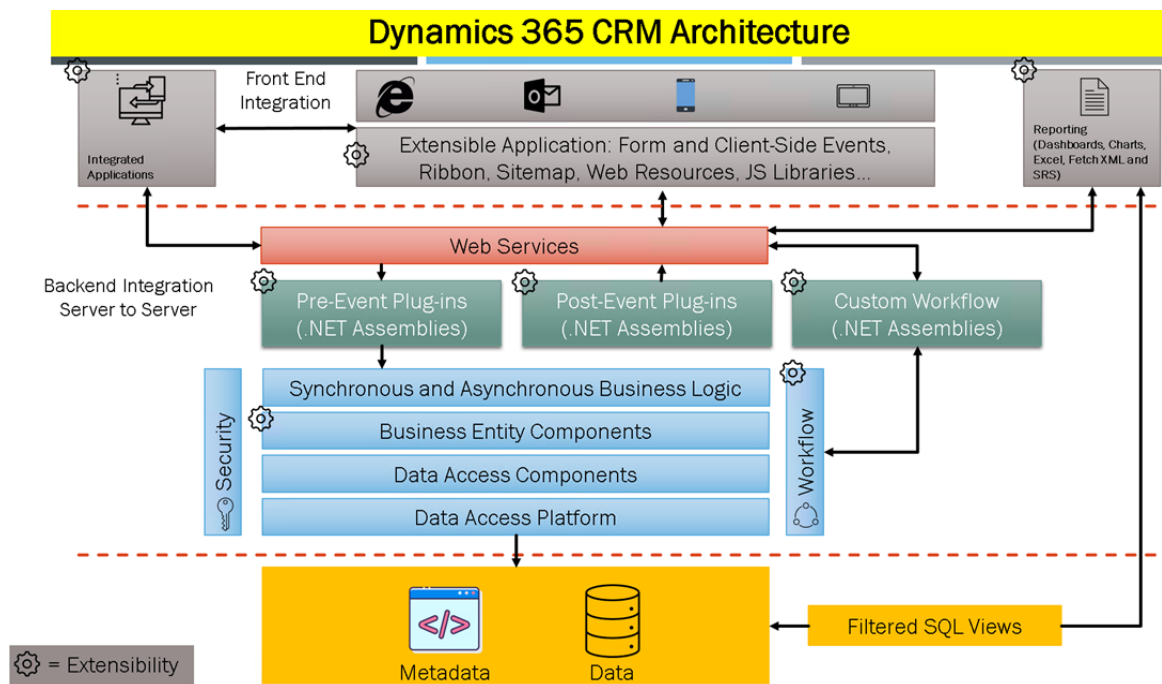
**Data Tier:**

The data or database layer is responsible for the storing the data and metadata of the Dynamics 365 CE application. The database used is SQL Server and the database will be configured when we install the CE application.

For every entity in the application there will be a corresponding table available in the application.

**D365 – Architecture Overview**

Following is an overview of D365 CRM architecture.



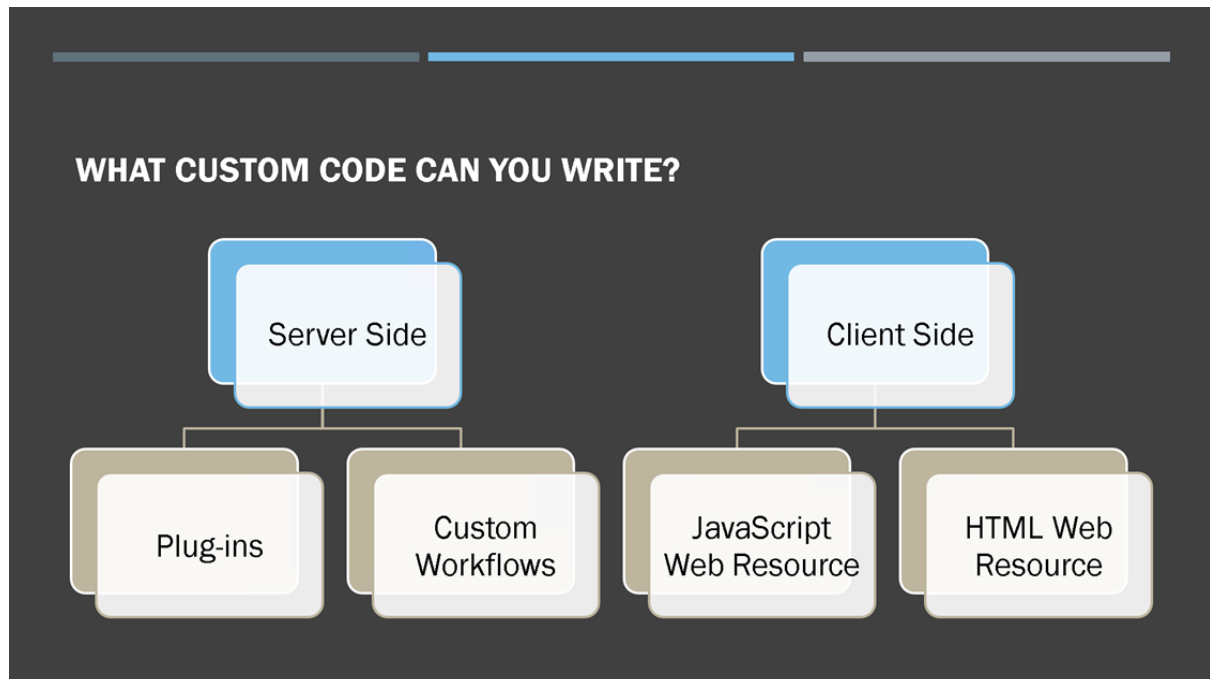
Understanding the architecture is important to understand the entire ecosystem of development tools here.

- So the first dotted line separates the client side components from the server side components.
- Wherever you see the gear icon, those components are customizable. So you can write some custom code where you see the gear icons and these components are available on client side as well as on the server side.
- Every D365 CRM instance has Metadata database and Data database. We don't need to do much with it as the platform takes care of these databases.
- Also, you cannot directly access or make changes to the database with any code.

What Custom Code can you Write?

You can broadly categorize the custom components into following types:

- Server Side
- Client Side



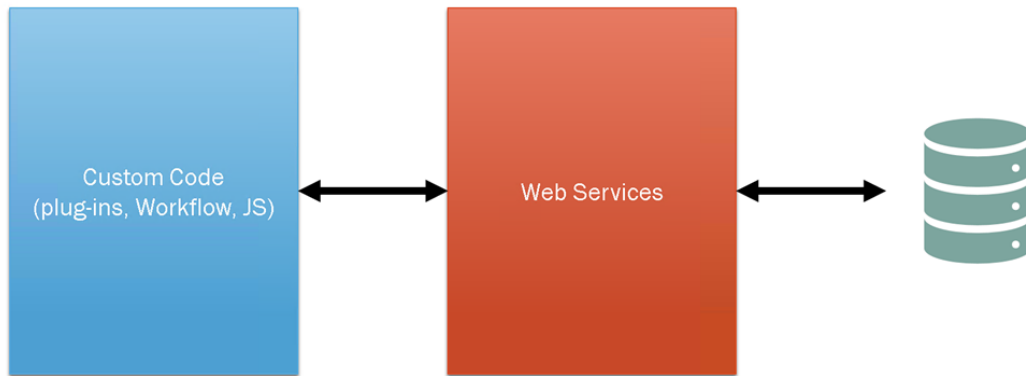
How does Custom Code access CRM data?

Custom code cannot access data directly from the D365 CRM database.

It can access data through API (Webservices) only. The connection between web services and databases is taken care of by the platform.

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## ACCESSING DATABASE THROUGH CUSTOM CODE



Second Week Content

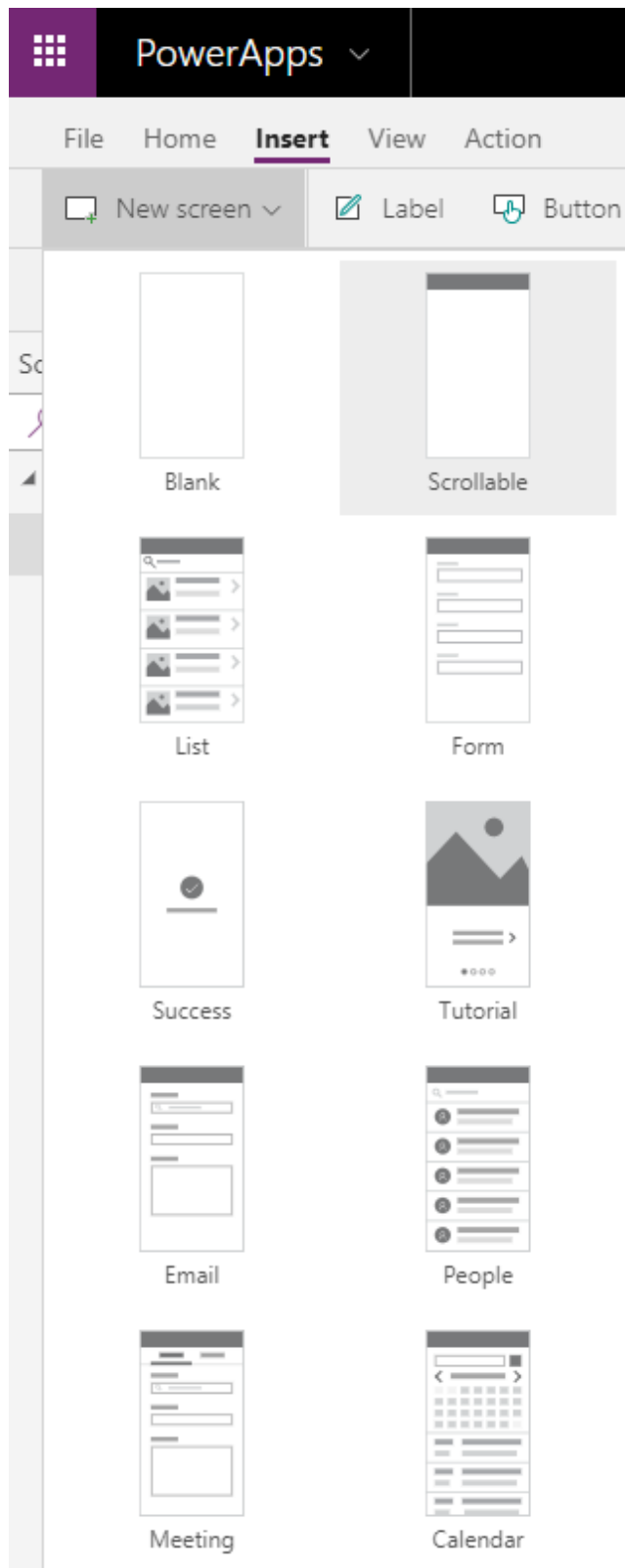
6 major components of PowerApps

### POWER APPS

If you want to embrace PowerApps, you first need to understand its anatomy and basic elements. With this post, I would like to highlight, what are, in my opinion, the major components of PowerApps one needs to understand first before creating the first app.

#### 1. GALLERY

A **gallery** is a way of visualizing data in the app. It is a template of screens that allows you to see and navigate the data. For example, you might have a gallery that contains a screen to see all records, then a screen to view a given record and a screen to edit a record.



All of the screens combined make up a **gallery**. You have different galleries to choose from when you create a new app. When you create an app from SharePoint list, you get a default gallery already pre-built for you.

Projects		↺	↻	+
🔍 Search items				
Project Manager				
Gregory Zelfond				
Status				
Active				
Project Type				
Consumer				
Project Manager				
Mary Smith				
Status				
Inactive				
Project Type				
Commercial				

### Example of a Screen based on a certain Gallery template

#### 2. SCREEN

As alluded to in the previous section, a **screen** is a way to visualize a particular data set or record on a screen (mobile, iPad, Desktop). You typically have one to view all records, one to view a particular record, one to edit. Once again, when you create an app from the template, you have screens already pre-built for you (they are part of a gallery you choose above). But you can add additional screens if necessary.

×

Projects

✓

Project Manager

Gregory Zelfond

▼

Project Type

Consumer

▼

Status

Active

▼

Attachments

There is nothing attached.

📎 Attach file

### 3. CARD

A screen consists of **cards**. A **card** is an area on the screen that shows a given record from your [SharePoint list](#) or any other database you used to build an app. For example, if you had a SharePoint list storing project names and built a PowerApp from this list, a single card might contain a **Project Name** field or **Project Manager** field or **Project Type** field or a **Status** field.

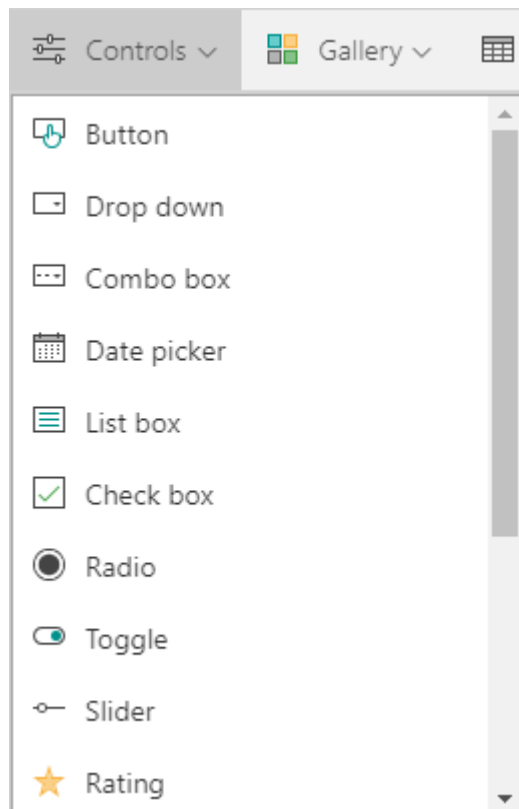
The image shows a mobile app interface for managing projects. At the top is a blue header with a close button (X) and a checkmark. Below the header, there are three main sections: 'Project Manager' with a dropdown menu showing 'Gregory Zelfond', 'Project Type' with a dropdown menu, and 'Status' with a dropdown menu showing 'Active'. A red rectangular box highlights the 'Status' field. A green text label 'CARD' points to this box. A tooltip with a lock icon and the text 'Card : Status' is positioned above the 'Status' field. Below these fields is an 'Attachments' section with the text 'There is nothing attached.' and an 'Attach file' button with a paperclip icon.

A card would contain all various attributes (called **Controls** in PowerApp – described below) related to the display of the record. For example, for **Status** field depicted in the image above, a card contains a **Drop-Down control** to enter Status as well as a **label** called “Status”.

#### 4. CONTROL

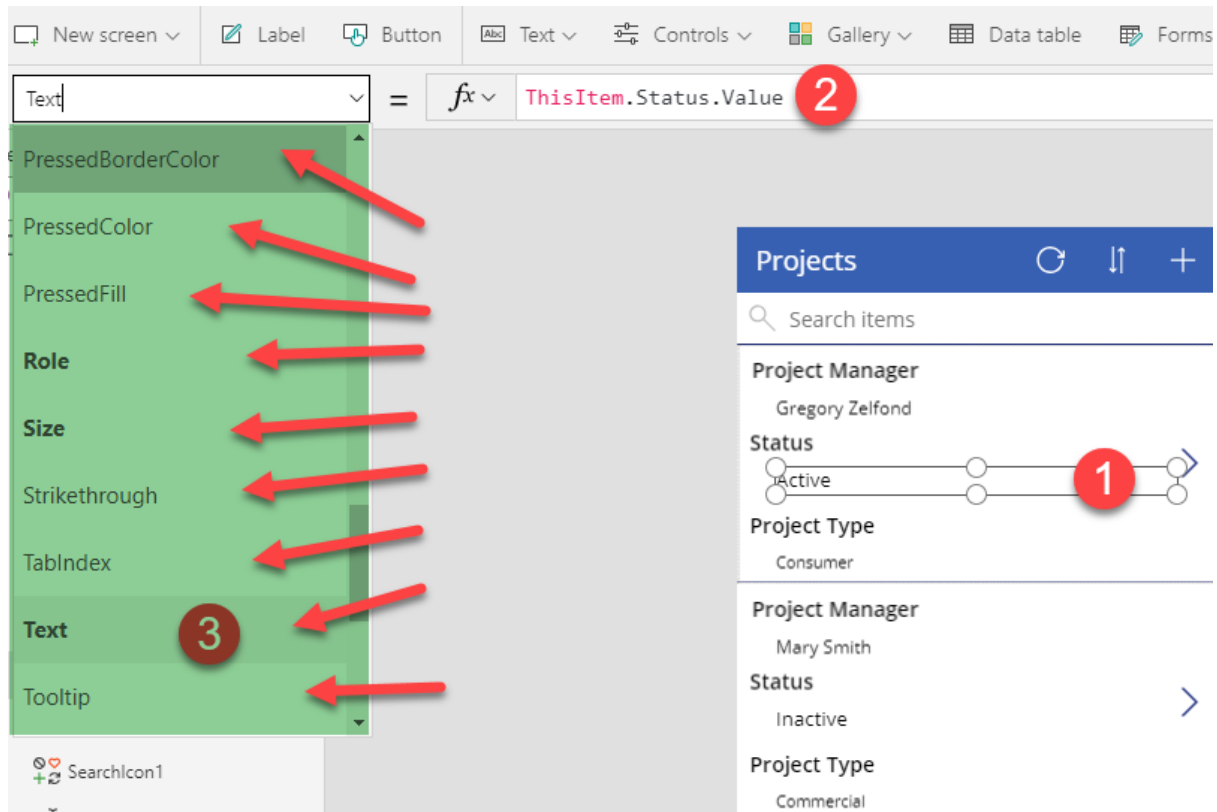
Controls is what allows you to visualize and interact with your records. Using the above **Status** field example, the **Drop-Down** to choose Project Status is a **control**. Depending on the type of your field, you can have different types of controls. For example, instead of a drop-down, I could have a radio button or toggle switch to make selection a bit more elegant on the phone app.



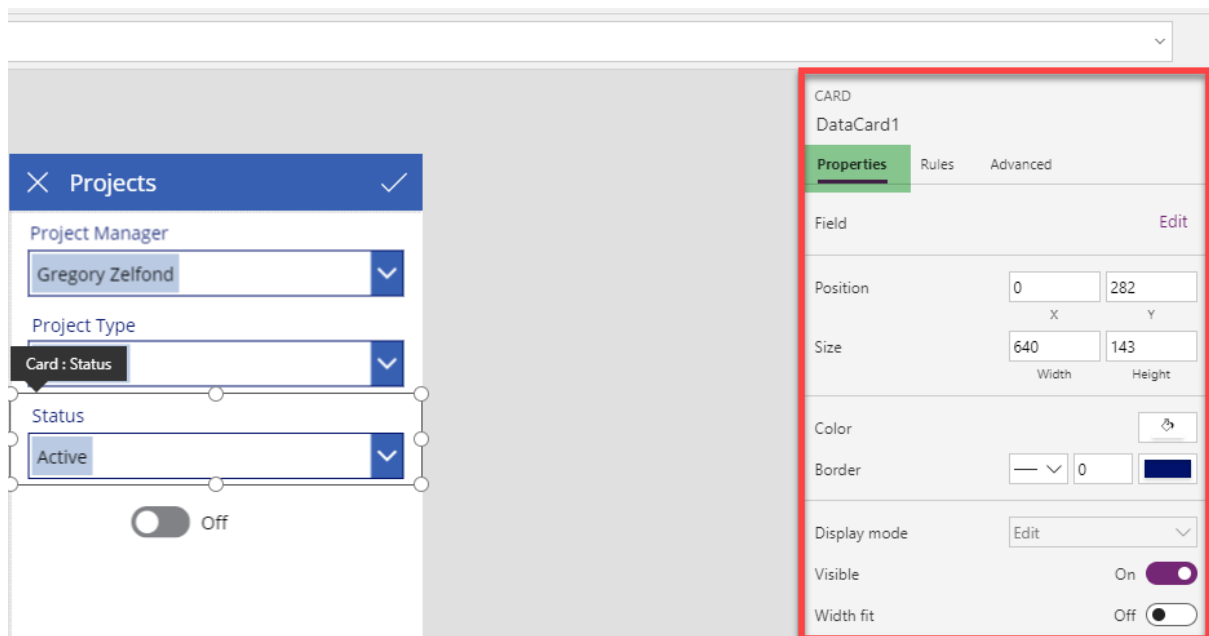


## 5. PROPERTY

Each control has **properties**. For example, a text entry box has a property for font size, text color, text box fill color and so on. Properties can be accessed and changed from the Properties drop-down on the left-hand-side of the screen as well as on the panel on the right-hand-side once the property is selected.



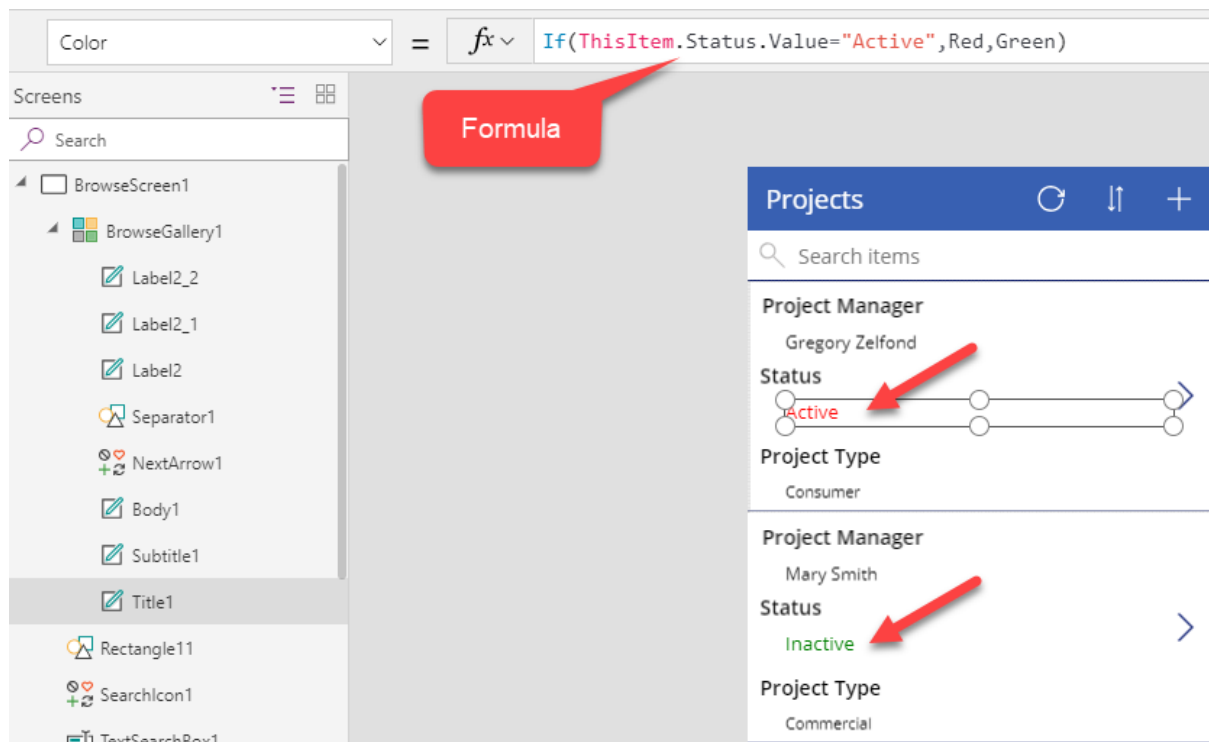
All the arrows point to properties of a certain control



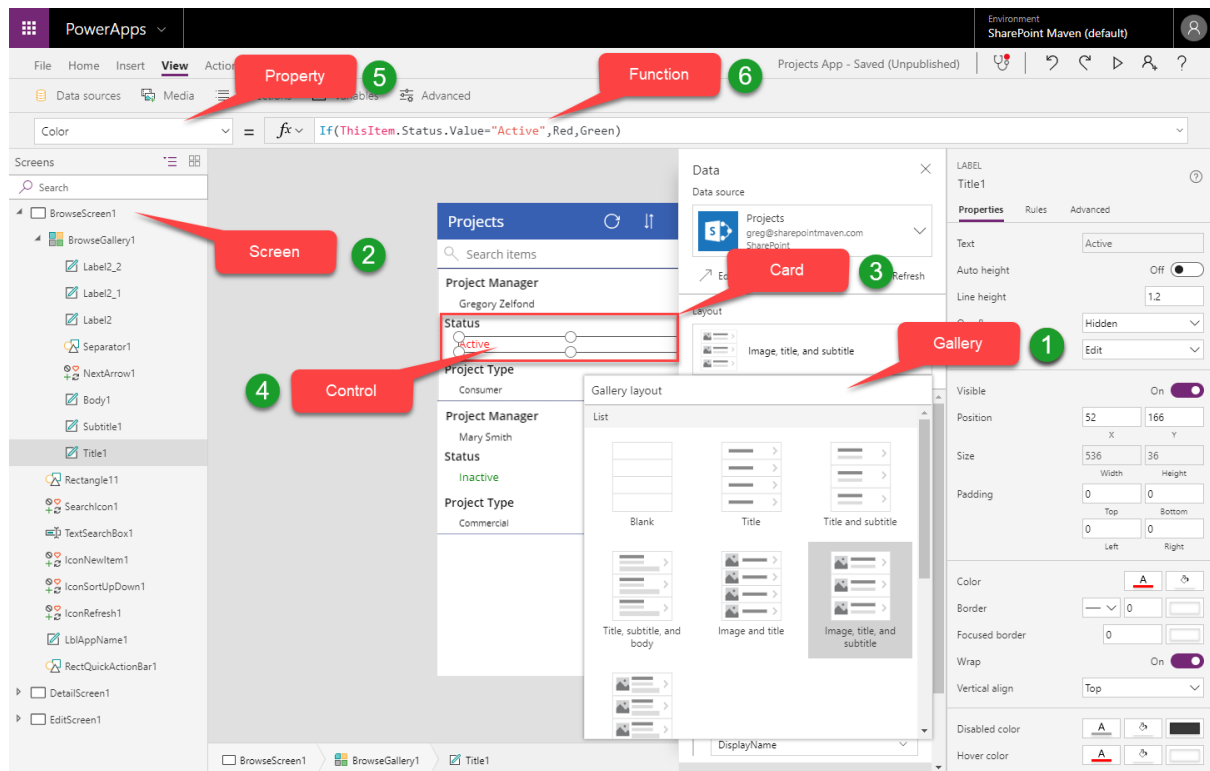
Another way to edit properties for the card

## 6. FUNCTION

Functions is how you interact with and change the properties. If you are familiar with Excel, you are in luck as the syntax for PowerApps functions is kind of similar to Excel. Below is an example where I use the **Formula** (If Statement) to change **Property** (Color) of a **Control** (Text) depending on the value of the field.



And now, putting it all together:



Tweet

## Custom Components in PowerApps

PowerApps can be a powerful tool for creating fast prototypes, small business apps, and proof of concepts. There are a lot of built-in components that are useful but often require a lot of configuration if you want more than just the default functions and style.

Enter PowerApps components. Components let you create your own reusable components which can be exported and

imported to different projects, and make maintenance a lot easier for developers.

Components are useful in building larger apps that have similar control patterns. If you update a component definition, all instances in the app reflect your changes. You can also improve performance by using one or more components because you don't copy and paste controls, which duplicates overhead.

Components are isolated instances that are decoupled from your app. This means that a custom component can't access variables declared in your app unless they are parsed as properties into the component.

## **custom connectors in Power Platform**

**Power Platform** has become one the most set of tools that many organizations are leveraging. Power Platform has the robust power of **Power Apps**, **Power Automate** and **Power BI** into one powerful business application platform that helps citizen developers as well as pro developers in providing quick and easy app building and data insights.

Microsoft Power Platform is low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications a shown below

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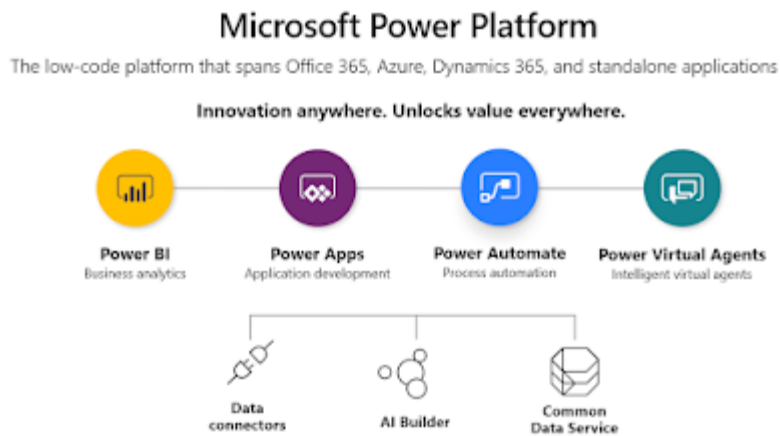


Figure 1 Credit: Microsoft

The best thing about Microsoft Power Platform is that it's catered not only for **citizen developers** but also for **professional developers** as shown:



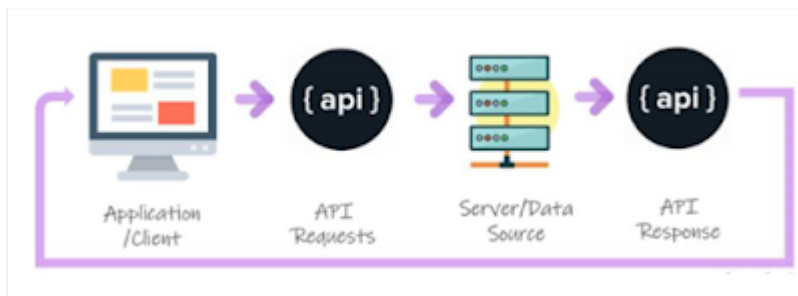
## Why needs an API in Power Platform?

Power Platform leverages Microsoft services to connect to other services such as SharePoint, OneDrive as 3<sup>rd</sup> party services such as **MailChimp**, Adobe Sign etc.

## What is an API?

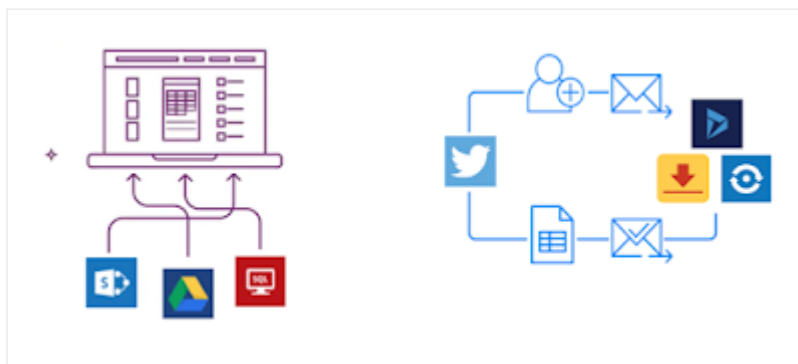
**API** (Application Programming Interface) that allows **two applications** to talk to **each other**.

for e.g. A user initiates **Power Apps** (Application) to get a signature **leveraging Adobe Sign**, this will be the API call from Application (Power Apps) and **Adobe Sign as a data source** as shown below.



## What is a connector?

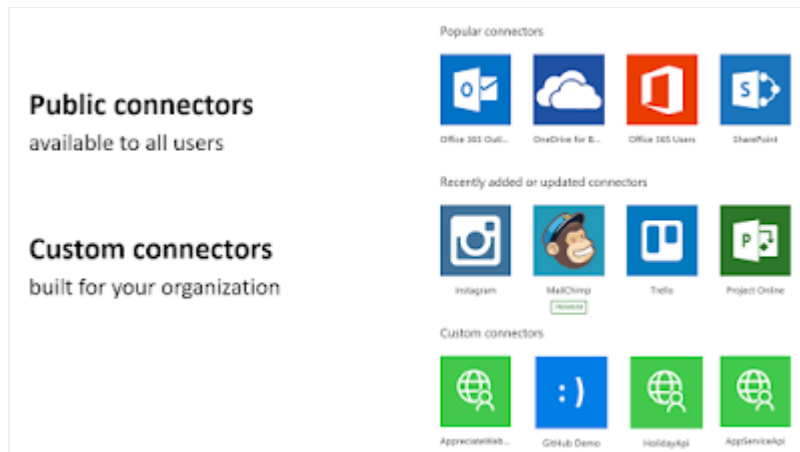
A connector is a **wrapper around an API** that allows the underlying service to talk to **Power Automate** and **Power Apps**.



## Type of connectors

You have 2 types of connectors.

1. **Public connectors (available to all)**
2. **Custom connectors (built for your organization)**



## Introduction of Variables

With the introduction of PowerApps, more and more users are moving into PowerApps development for easy and no-code development tools. However, users from a coding background found it difficult, as there were no variables in PowerApps. Not now, with the introduction of variables in PowerApps, it has become a Powerful no-code tool. So let's understand PowerApps Variables and how they work.

## Types of Variables

Just as we have different scopes of variables in the programming language in PowerApps, we also have different scoped variables the three different types of variables which are available in PowerApps, as mentioned below:

Global variable	App	This is similar to a global variable in programming language and it can hold a number, text string, Boolean, record, table, etc as a data value	Set
Context variables	Screen	This is similar to the parameter which we pass to methods or procedure and this variable can be referenced from only one screen	UpdateContext Navigate



Collections	App	This variable can store table which can be referenced across anywhere in the app	Collect ClearCollect
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### Creating and Removing Variables

In all programming languages, we declare a variable before using the variable but such is not the case with PowerApps. So, in PowerApps we never declare variables explicitly. In terms of typing, PowerApps has implicit typing. So, we do not require to specify the type of variable for example `int a = 0` in programming language indicated the variable is of type integer but in PowerApps we do not require to specify the type of variable.

To create a variable, we just need to run the function:

- `Set(global Variable, "Hello World")`
- `UpdateContext({context Variable:"Hello World"})`
- `Collect( collection Variable, "Hello World" )`

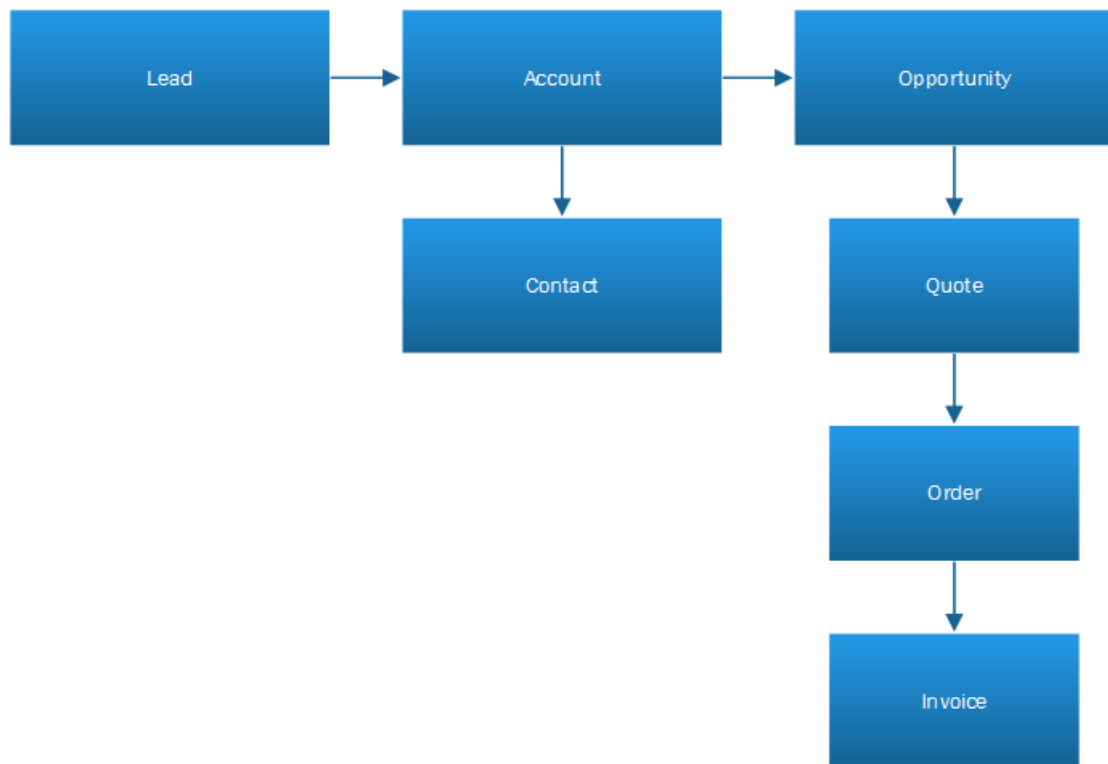
Where X is the variable name and Hello World is the value of that variable.

For removing the variable, we are required to remove all Set, UpdateContext, Navigate, Collect, or ClearCollect functions that implicitly establish the variable. If these functions are not present then there is no variable. We must even remove the variable reference if used in other places.

## 3rd Week Content

### Sales life cycle

Generally, the sales life cycle starts with Lead generation. A lead is your potential customer. When an individual or a company shows any interest in your product/service and provides some details for further communication, then it is considered a lead:



The salesperson either manually enters the details of the lead into the CRM or captures the details through mails, websites, phone calls, campaigns, and so on. It requires a lead name (first name and last name) and a topic that describes the lead.

After lead creation, the salesperson does multiple activities to convert it to a customer. This can be done in form of appointments, ...

### **The Accounts & Contact:**

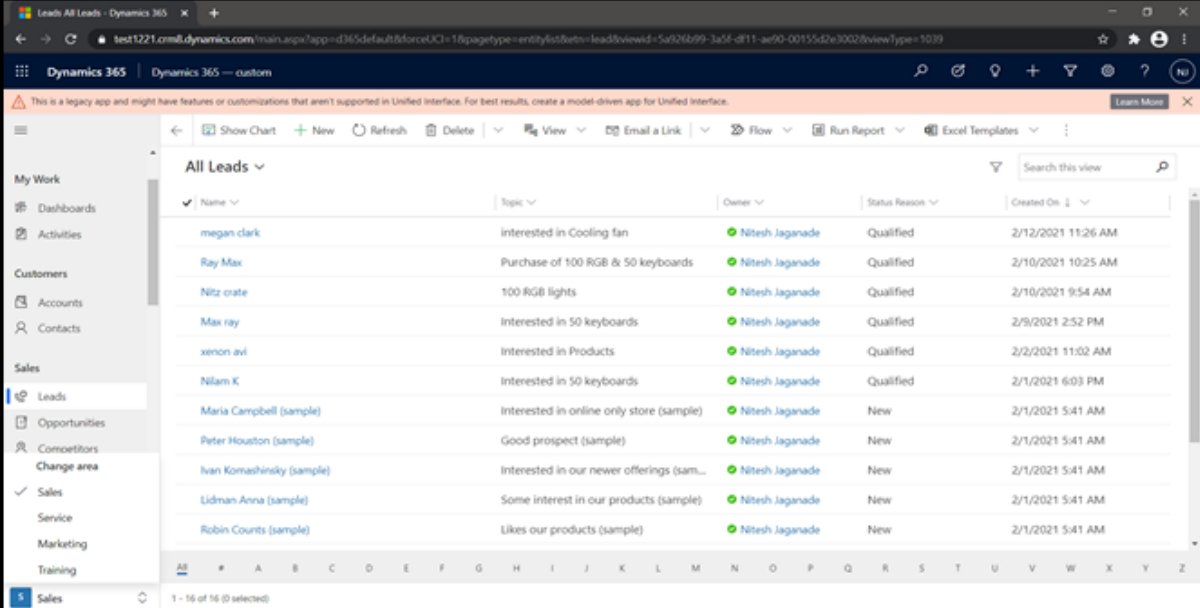
Accounts are entities with which your organization has a relationship. In Dynamics CRM, this is where all account information is stored in the database. Accounts can include prospects, vendors, business partners, and more.

Contacts are individuals with whom your organization has a relationship; these are generally customers or contacts of customers. Contacts are often related to an account, but certain

organizations and businesses may serve or sell to individual consumers as well.

Navigation steps for [Sales Process Life cycle](#):

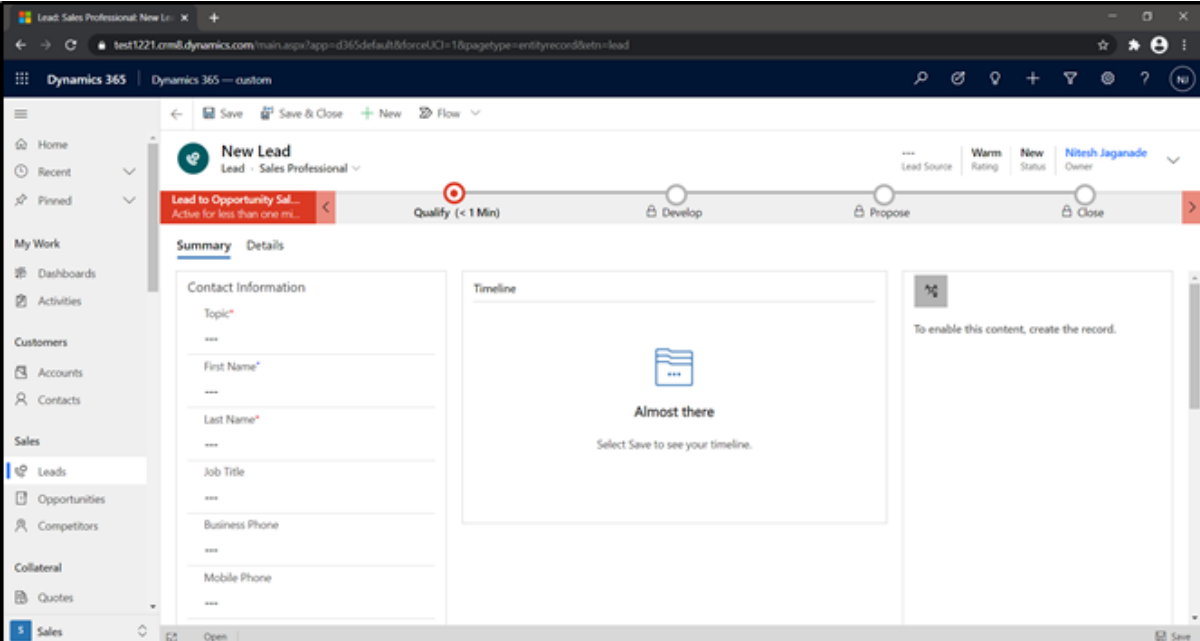
First Select Area -> Sales, from left bottom (change area)



Name	Topic	Owner	Status Reason	Created On
megan clark	Interested in Cooling fan	Nitesh Jaganade	Qualified	2/12/2021 11:26 AM
Ray Max	Purchase of 100 RGB & 50 keyboards	Nitesh Jaganade	Qualified	2/10/2021 10:25 AM
Nitz crate	100 RGB lights	Nitesh Jaganade	Qualified	2/10/2021 9:54 AM
Max ray	Interested in 50 keyboards	Nitesh Jaganade	Qualified	2/9/2021 2:52 PM
xenon avi	Interested in Products	Nitesh Jaganade	Qualified	2/2/2021 11:02 AM
Nilam K	Interested in 50 keyboards	Nitesh Jaganade	Qualified	2/1/2021 6:03 PM
Maria Campbell (sample)	Interested in online only store (sample)	Nitesh Jaganade	New	2/1/2021 5:41 AM
Peter Houston (sample)	Good prospect (sample)	Nitesh Jaganade	New	2/1/2021 5:41 AM
Ivan Komashinsky (sample)	Interested in our newer offerings (sam...	Nitesh Jaganade	New	2/1/2021 5:41 AM
Lidman Anna (sample)	Some interest in our products (sample)	Nitesh Jaganade	New	2/1/2021 5:41 AM
Robin Counts (sample)	Likes our products (sample)	Nitesh Jaganade	New	2/1/2021 5:41 AM

Navigate to Leads -> click on new from the top

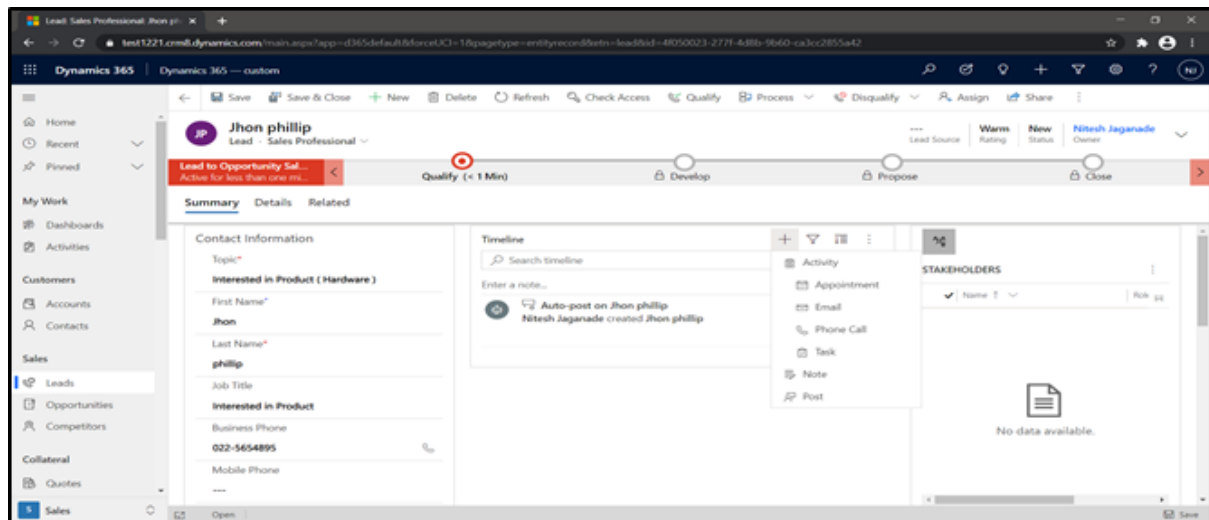
(form will appear regarding lead information)



Fill all the details of a Lead then click on Save button.

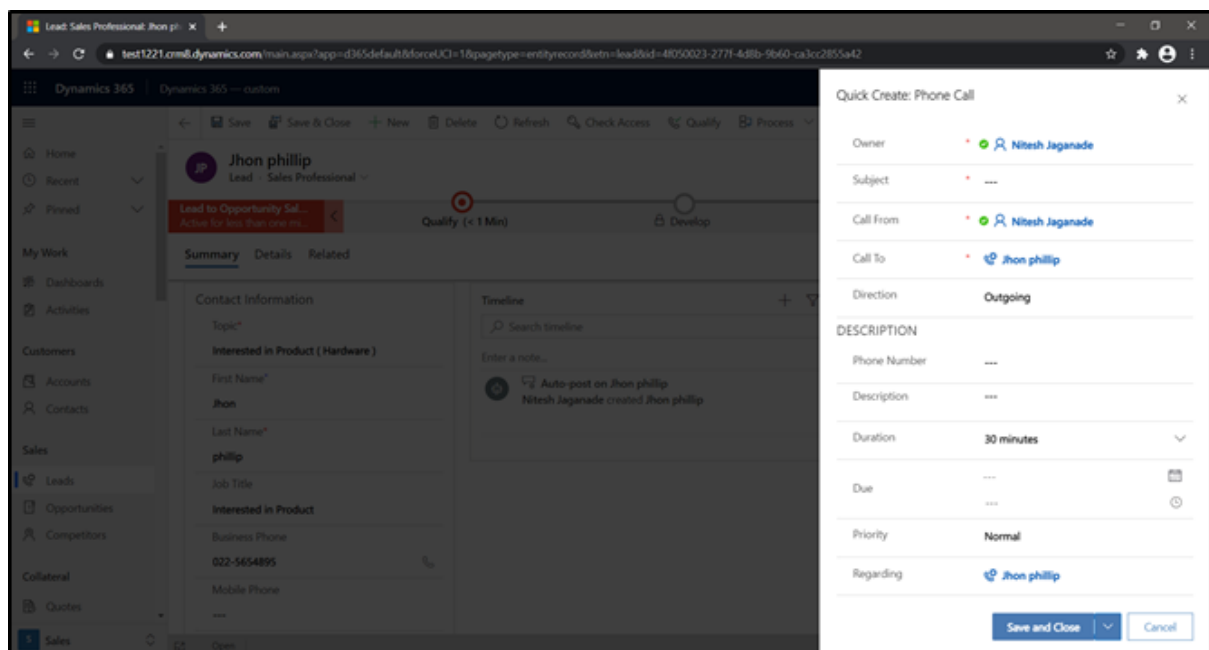
After saving the details of lead it will get converted into An Opportunity based on approach.

Using the Activity options from Timeline we can set call, email, appointment & task.

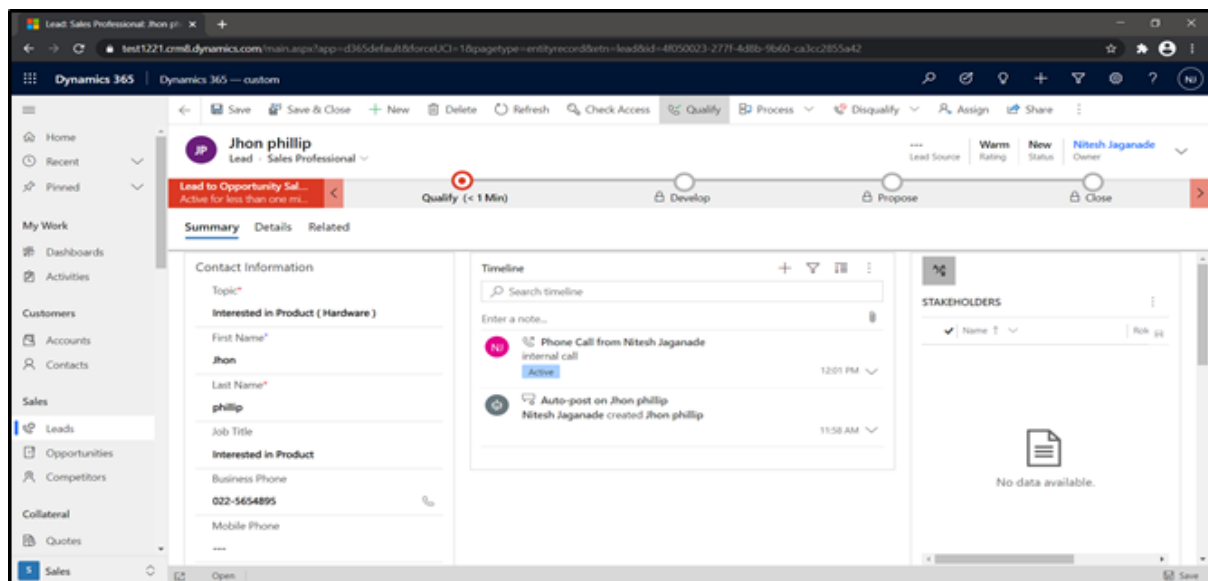


For example, if we try to create a phone call with the lead.

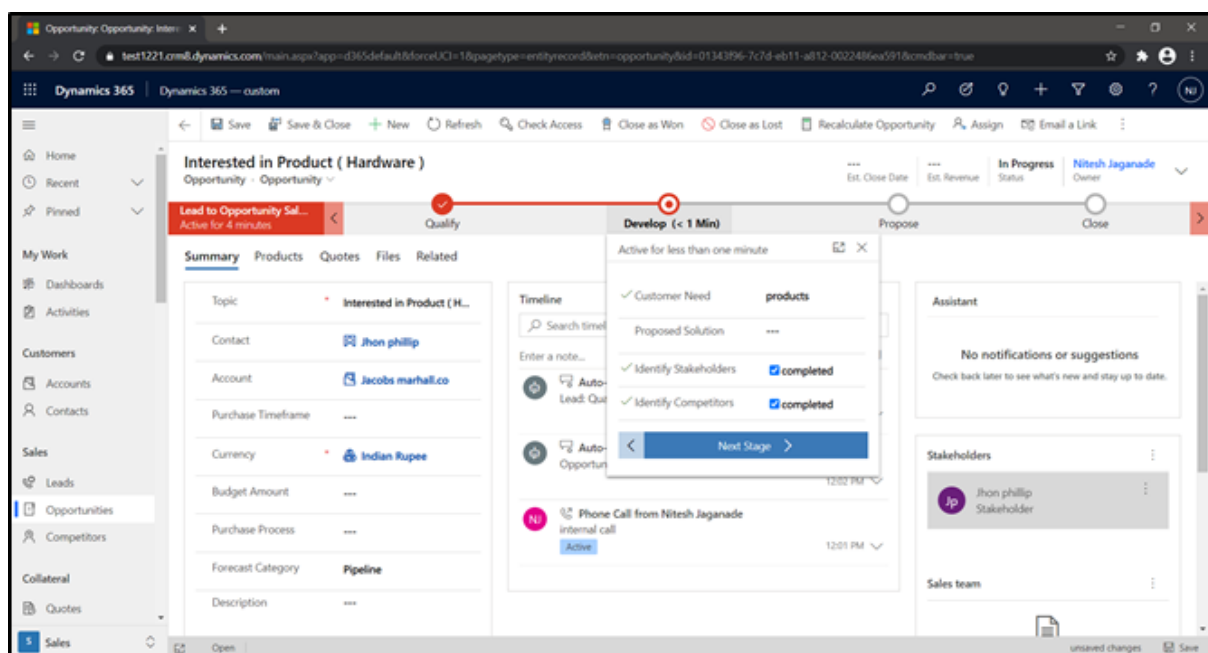
Activity->Phone call ([Quick create form](#) will open)



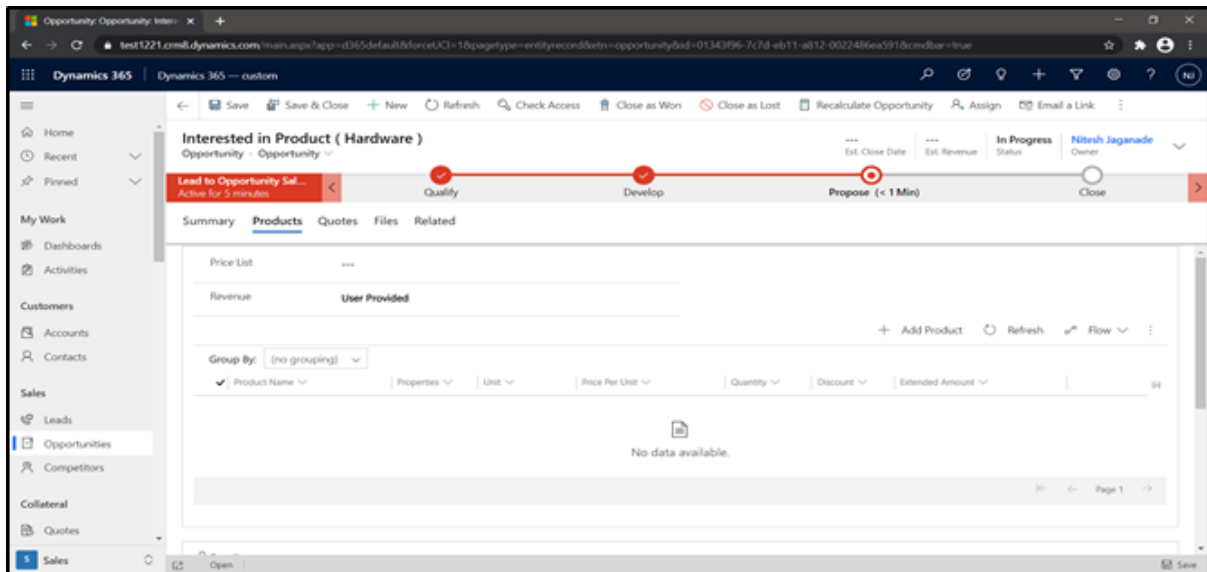
After entering all the call details -> Save and close. All the updated tasks will now appear in Timeline. (as shown in image)



After confirming, select Qualify from top tab -> click on Develop from BPF & complete all requirements -> next stage.

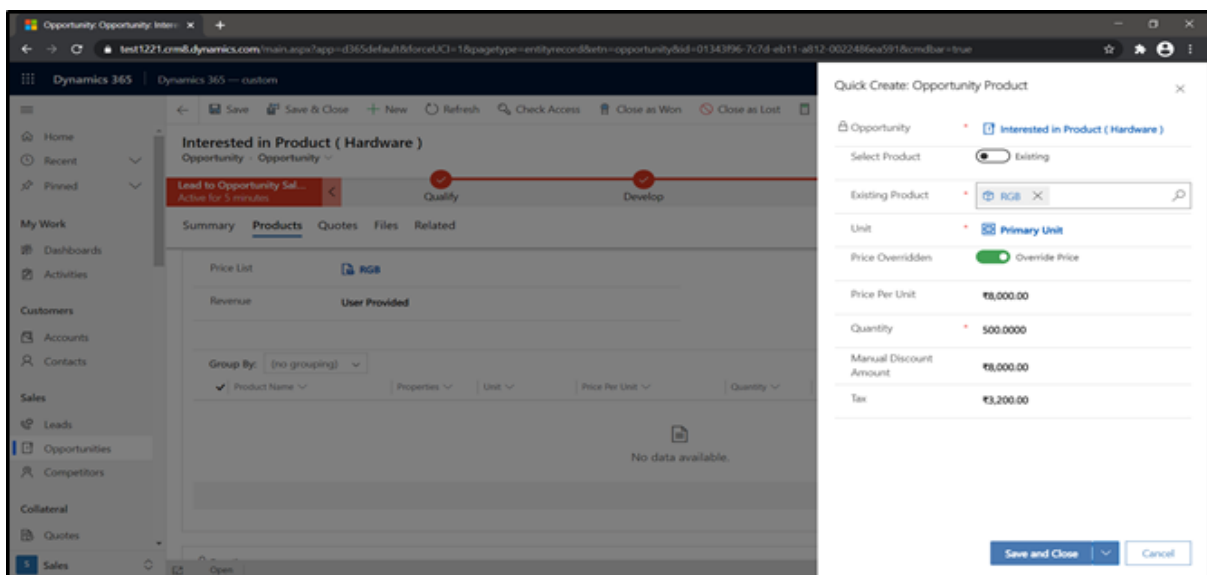


Now the Product Tab will appear beside summary, select Products.



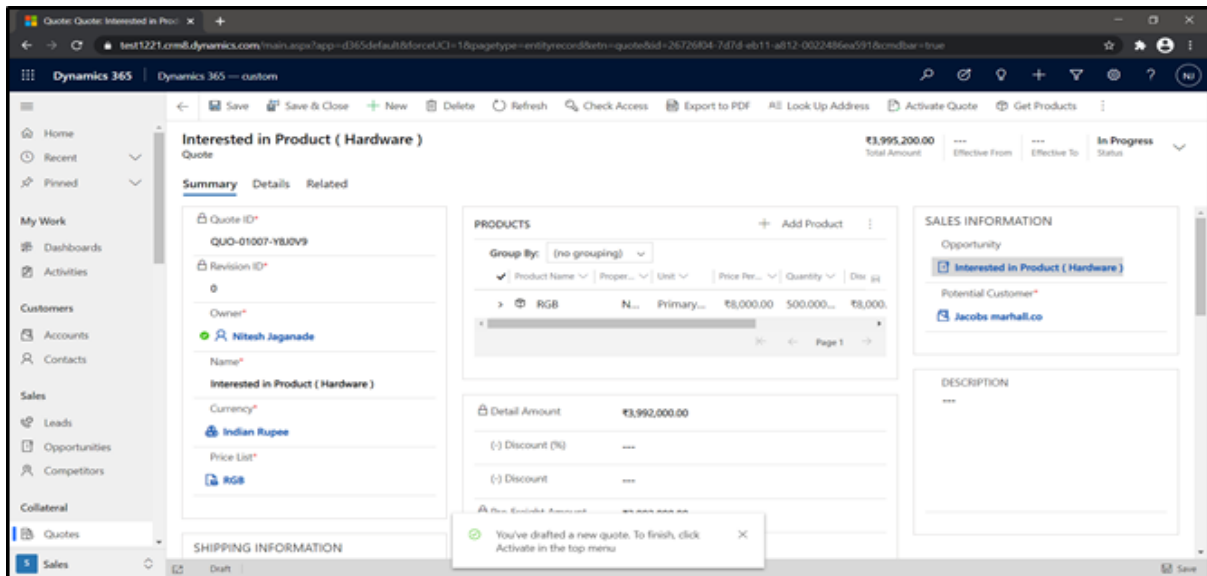
Set price list->Revenue ->add Product.

After selecting add Product, the Quick create form will appear (as shown in image).



Fill in all the required details of Product & Quantity-> Save and Close.

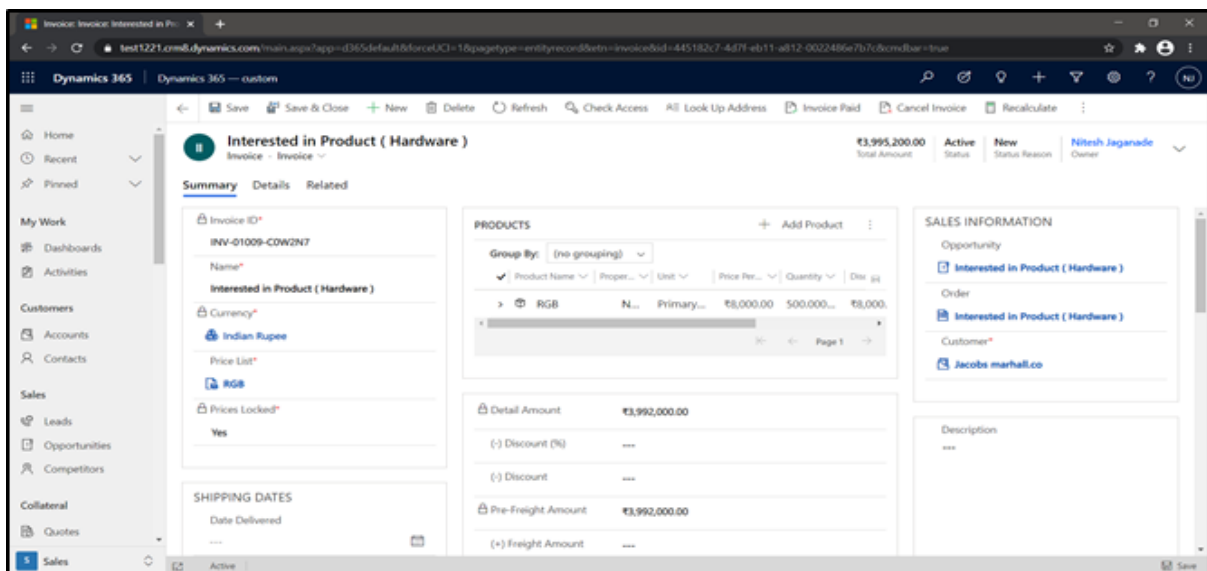
Quote will appear (as shown in image).



Select Activate Quote from top-> Propose the Quote after getting approval for it -> click on Create order.

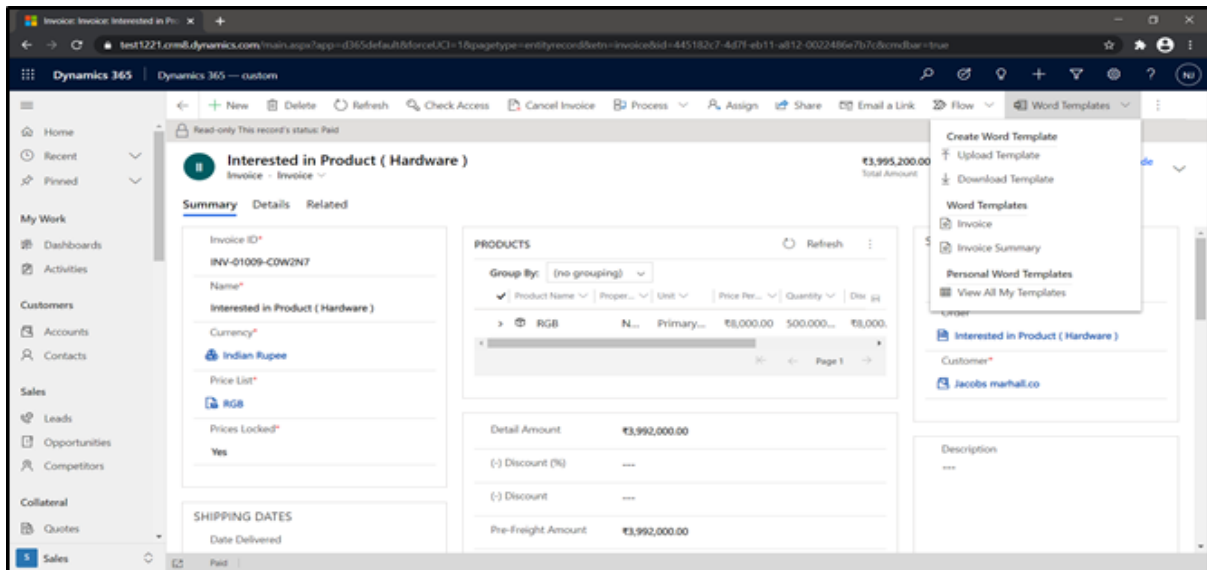
Create order -> Full fill order (after fulfilling order)

Select Create Invoice, it will get created (as shown in image)

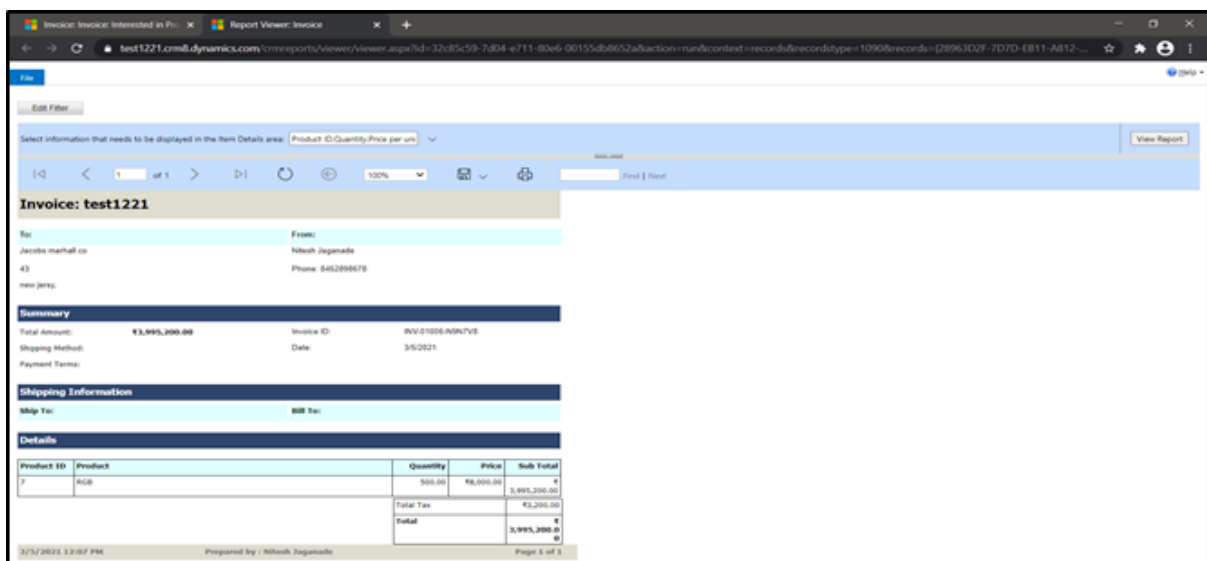


After getting paid for certain order, select Invoice Paid from the top (also the amount paid status can be set from there).

From the word template, we can get all the templates.



After selecting an invoice from the list, the invoice will appear, you can view it in the default viewer or save it to the system.



The Sales Process Flow gets complete.



# **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:

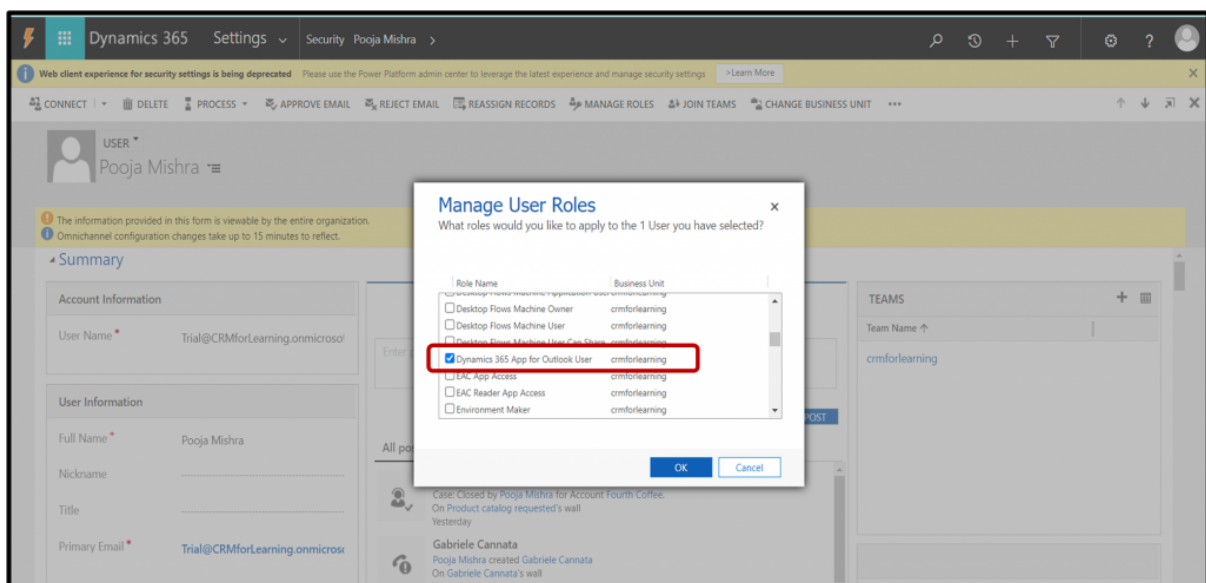
NAVIGATION STEPS:

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

Step 2: Select the User.

Step 3: Navigate to Manage Roles.

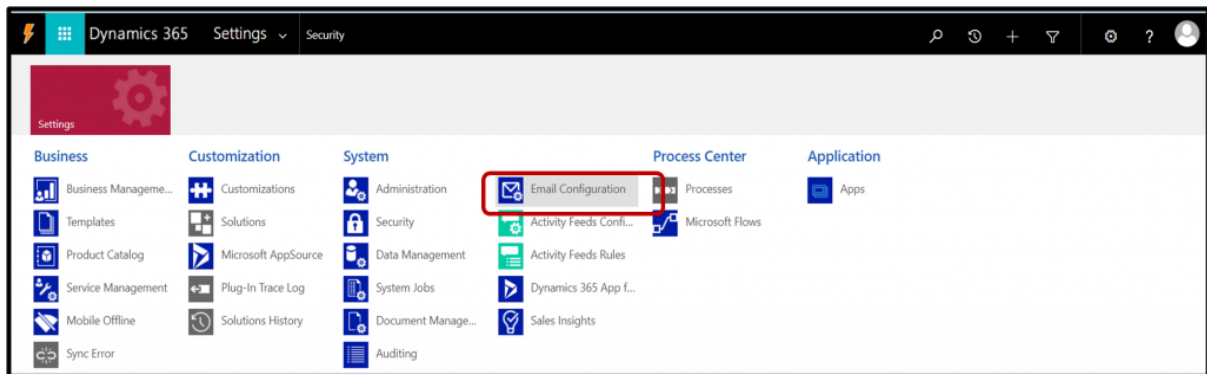
Step 4: Provide user a Security Role – Dynamics 365 App for Outlook User in your Dynamics.



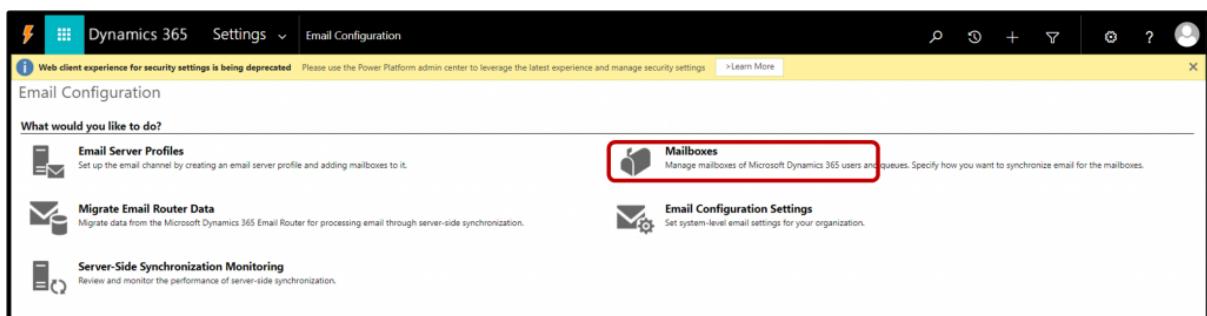
## 2. E-Mail Configuration:

### NAVIGATION STEPS:

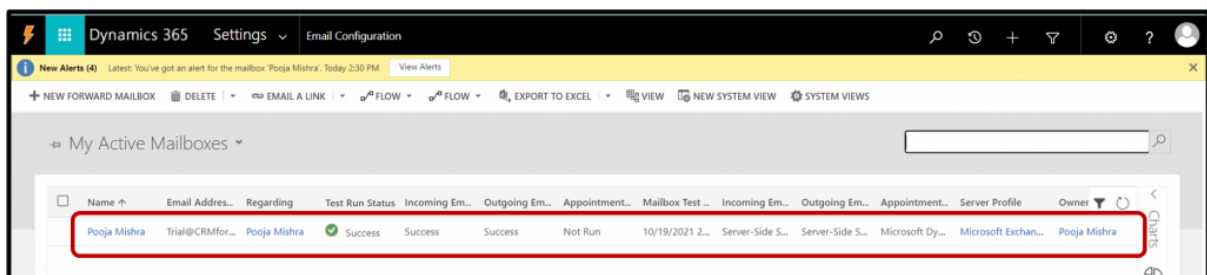
Step 1: Navigate to Advanced Settings -> Email Configuration.



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 Microsoft Dynamics 365 App for Outlook.

Step 6: Save the Form.

Step 7: Click on Approve Email option. A pop-up message Approve Primary Email will 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.

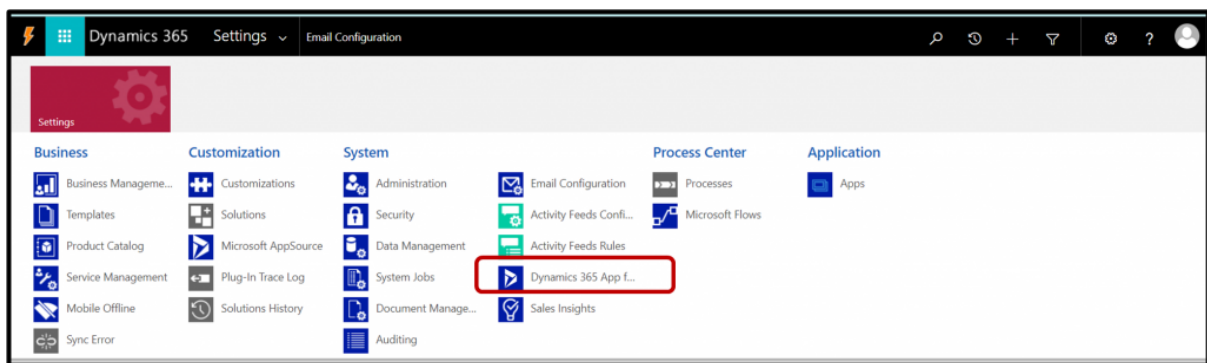
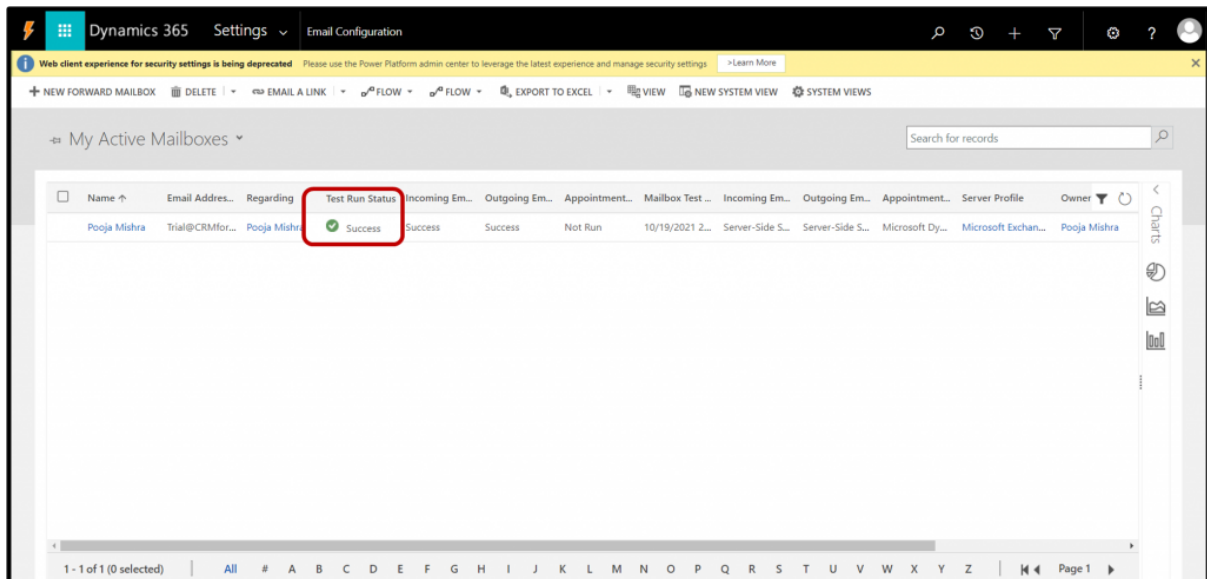
The screenshot displays the 'Mailbox' configuration form for 'Pooja Mishra'. The top toolbar contains several buttons: 'Save & New', 'Delete', 'Save', 'Save & Close', 'Deactivate', 'Book', 'Save', 'Signin Email', 'Test & Enable App Mailbox' (highlighted with a red box), 'Default Email Settings', 'Approve Email' (highlighted with a red box), 'Reject Email', and 'Download Mailbox Details'. The main content area is divided into sections: 'Configuration Test Results' showing 'Incoming Email Status' as 'Success' and 'Outgoing Email Status' as 'Success', and 'General' section with 'Mailbox Information'. The 'Outgoing Email' dropdown menu is highlighted with a red box, showing options: 'Server-Side Synchronization or Email Router' and 'Microsoft Dynamics 365 for Outlook'.

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

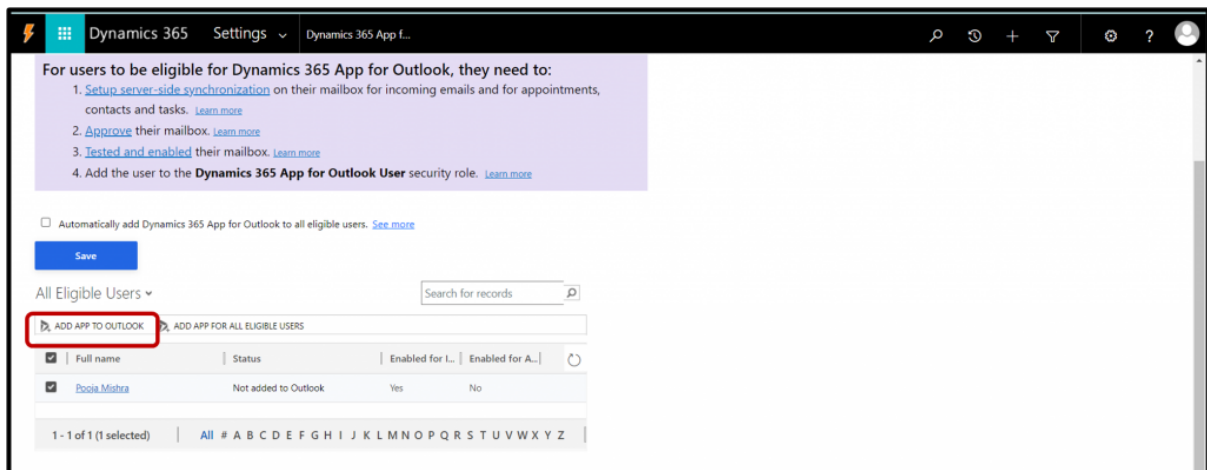
### 3. Add Dynamic 365 App to Outlook:

#### 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.

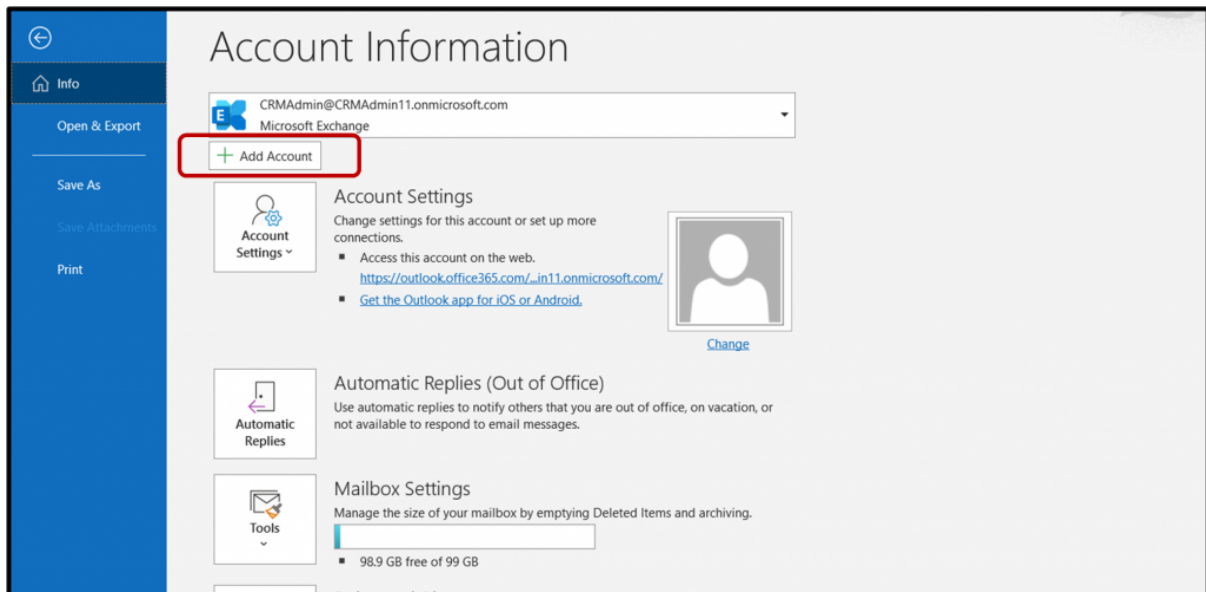


4. Add an account with Outlook:

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.

## Microsoft flow OR Power Platform

Microsoft flow helps you to simplify your day to day **repetitive tasks** to flows, that can run or execute automatically without much manual intervention.

But Flow is not just meant for SharePoint, Microsoft flow allows you to **connect and communicate with other services** like Google, Gmail, Facebook, Twitter, and many more business applications.

By using flow, you can **send automatic notifications**, push notifications or emails, ask for **approvals** from designated persons, and many more things you can do.

## What is Power Automate?

What is Power Automate? **Power Automate is nothing new, Microsoft just renamed Microsoft Flow to Power Automate.**

Why use Microsoft Flow?

Why use Microsoft Flow? **We can use flow to automate lots of business processes by adding various flow actions with stages and steps. Now only this we can also use flow to send just email notifications or push notifications.**

Apart from this, we can also use Microsoft flow to **start simple to complex approvals**, even we can start various multilevel approval processes.

Not only this we can also use other services to **capture information**. For example, we can use Microsoft flow to capture data from Twitter or Facebook on a specific hashtag.

Even we can **store email attachments** from your email to SharePoint document library by using flow. We can create a flow that will trigger whenever you will receive an email with an attachment, this will store the attachment in SharePoint.

Even we can also **copy files between one drive for business and SharePoint** or even we can sync new OneDrive files to Google drive files. And, we can also upload photos to OneDrive for Business on a button flow.

Office 365 uses Microsoft Teams. We can even use flow to communicate with the Microsoft team from other applications. Like, we can Microsoft flow to **post messages to Microsoft teams when a new task is created in Planner**. Or we can **alert the team when a specific documents are uploaded**. Or even we can **post message to Microsoft Teams when an email arrives in Office 365 Outlook**.

But any time you can customize the flow according to your business needs.

Few flow templates are:

- Send myself a reminder in 10 minutes
- Start approval when a new item is added
- Send a customized email when a new SharePoint list item is added
- Save Gmail attachments to your Google Drive
- Save tweets to a Google sheet
- Copy files from Google Drive to Onedrive on a daily basis

- Block out my Office 365 calendar for an hour
- Start approval for new documents and notify via Teams, etc.

### Microsoft flow connectors

Microsoft provides flow connectors to connect with various services like Twitter, RSS, SQL Server, Google Calendar, Google Drive, Yammer, Slack, GitHub, Google Tasks, Asana, Twilio, etc.

There are nearly 250 connectors are available to work with various other services in Microsoft flow or Power Automate.

### Standard flow connectors

These are the connectors that are available with your flow license to use. Examples of a few **standard flow connectors** are Twitter, LinkedIn, Google Calendar, OneDrive for Business, Mail, Gmail, Dropbox, Trello, Instagram, Box, Buffer, Campfire, etc.

### Microsoft flow Premium Connectors

**Flow premium connectors** require an additional license to use those connections. All premium connectors marked as Premium so that you can separate it from standard connectors. A few premium flow connectors are Azure DevOps, Dynamics 365, Salesforce, Agile, AirSlate, Ally, [Azure VM](#), Chainpoint, Chatter, etc.

### Custom flow connectors

You can also create your own custom flow connectors and can access various applications.

### **Type of Flows**

We can create different types of flows for your business processes.

- **Automated flows:** We can easily create an automated flow that will trigger automatically. For example, you can create a flow that will trigger automatically whenever someone inserted an item to a SharePoint Online list.

- **Instant Flows:** Microsoft Instant flows will trigger on a button click. On a button click you can send a notification to your manager regarding work from home email.
- **Scheduled Flows:** Microsoft scheduled flows will trigger automatically on a specific scheduled time. For example, you can copy items from one SharePoint library to OneDrive for business on monthly basis.
- **Business process flows:** You can create a flow for your organization and ensure that everyone in the company follows the same steps. IT Support ticket systems.
- **UI flows:** In a UI flow, you can record clicks and keyboard strokes from your desktop and web applications and then you can automate the playback of manual steps on legacy software.