**Automatic generation/update of a Microsoft Outlook invite for a session upon a session registration in Dynamics 365 Marketing**

**Purpose/Scenario:**

This solution automates sending of an outlook invite for an event when a participant uses portal to register for a session through the portal or Event Manager adds Event Registration record manually through MDA or through Excel import.

After an outlook invite is sent, if critical session fields in Dynamics 365 Marketing are updated (such as start time, end time), an updated meeting invite gets automatically triggered.

**Assumption:**

SessionRegistration record creation

**Or**

Session is updated and “Critical Field” flag is set and event status is “Live”

**Solutions:**

**Unmanaged Solution:** InviteonSessionRegistration\_1\_0\_0\_0.zip

**Managed Solution:** InviteonSessionRegistration\_1\_0\_0\_0\_managed.zip

**Prerequisite:**

Marketing solution should be installed in the organization on which the above solution is being imported on

**Steps:**

This solution automates the process to send out outlook invite when a user registers for a session. Time-zone calculations are also performed based on the time and time-zone set at the event level in Dynamics 365 Marketing

1. Import the solution “MSFT Invite on Session Registration”
2. This solution contains the following components

Graphical user interface, text, application, email

Description automatically generated

1. This solution will install two connection references i.e., Microsoft Dataverse and Office 365 Outlook. Post installation of the solution you must configure the above two connection references with the respective users by clicking on the ellipsis and select Edit

Graphical user interface, text, application, email

Description automatically generated

1. Two cloud flows
2. Create Invitation when Session Registration is created- This flow triggers when an record gets created in the Session Registration table and sends out the outlook calendar invites to the registered contact for a particular session. This also updates a field “Outlook Calendar Id” present in the Session Registration table. Using this column, we can identify whether the invites has been sent or not

Graphical user interface, text, application, email

Description automatically generated

These steps have to be followed for activating the flows

1. Configure the connection references as mentioned in step 3 and choose the valid references here

Graphical user interface, application

Description automatically generated

For outlook

Graphical user interface, application

Description automatically generated

1. Please select the Calendar Id. This has to be done manually because once the connection changes this Id gets changed automatically.

Graphical user interface, application

Description automatically generated

1. This Create Event has a generic Email body. If you wish to change you can change it by modifying the body below

Graphical user interface, application

Description automatically generated

1. In this step we are updating outlook calendar id on Session registration to track whether the invites have been sent or not

Graphical user interface, application

Description automatically generated

Post these steps you can click on Save and Turn on the flow by clicking on “Turn on”

Graphical user interface, text, application

Description automatically generated

1. Once the flow gets triggered the contact will be receiving a outlook calendar invite with the sample body as below.

Graphical user interface, text, application, email

Description automatically generated

1. [MSFT][IOSR] Send Invitation on Critical Update of Session

This flow will trigger when Critical Update field on Session is set to Yes and Session Status is set to Live. Main usage of flow is to send out the updated outlook invites to all participants(contacts) of session added as rows in Session Registration table when any details like session timings are updated.

Graphical user interface, application

Description automatically generated

Graphical user interface, text, application

Description automatically generated

These steps have to be followed for activating the flows

1. Choose the respect connection references for Microsoft dataverse and office 365 outlook
2. Please select the Calendar Id. This has to be done manually because once the connection changes this Id gets changed automatically.

Graphical user interface, application

Description automatically generated

1. This Create Event and update event actions has a generic Email body. If you wish to change you can change it by modifying the body below

Graphical user interface, application

Description automatically generated

1. After all these are performed you can save the flow the Turn on as performed in the above flow steps
2. Once this flow gets successfully executed, the critical update flag on the session is set to No by using the below action

Graphical user interface, text, application, email

Description automatically generated

Note: All these flows will perform time zone calculations based on the Time Zone field present on Event table