

TRACKING EMAILS FROM OUTLOOK TO CAPCONNECT

Emails that have been sent or received (Inbox and Sent Items) in Outlook can be tracked to records in CAPConnect (Microsoft Dynamics 365). You can link an email to the following record types:

- Clients, Contacts, Leads, Opportunities

To link or track an email, select the email in your box or open the email. Under the Home tab if selecting the email in your box, or under the Message tab if you open the email, click the Dynamics 365 button.

Home

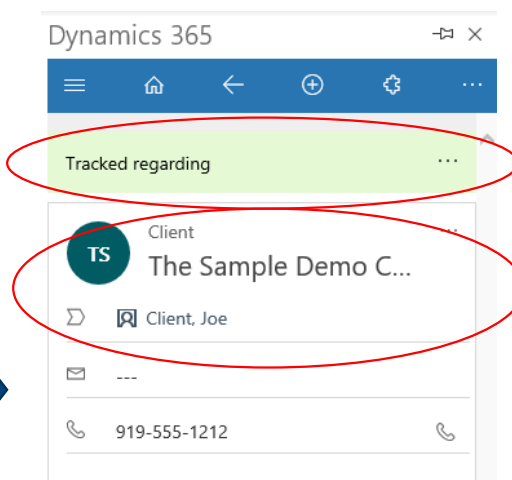
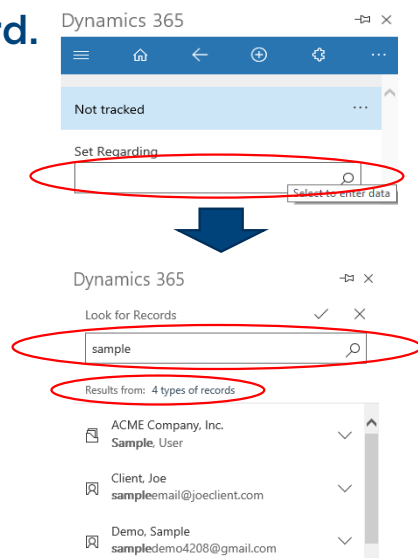
or

Message

click



A window will open on the right. Under Set Regarding, click in the field to search your record.




This will search all 4 record types. You can filter the record type by click on the Results From field below the search.

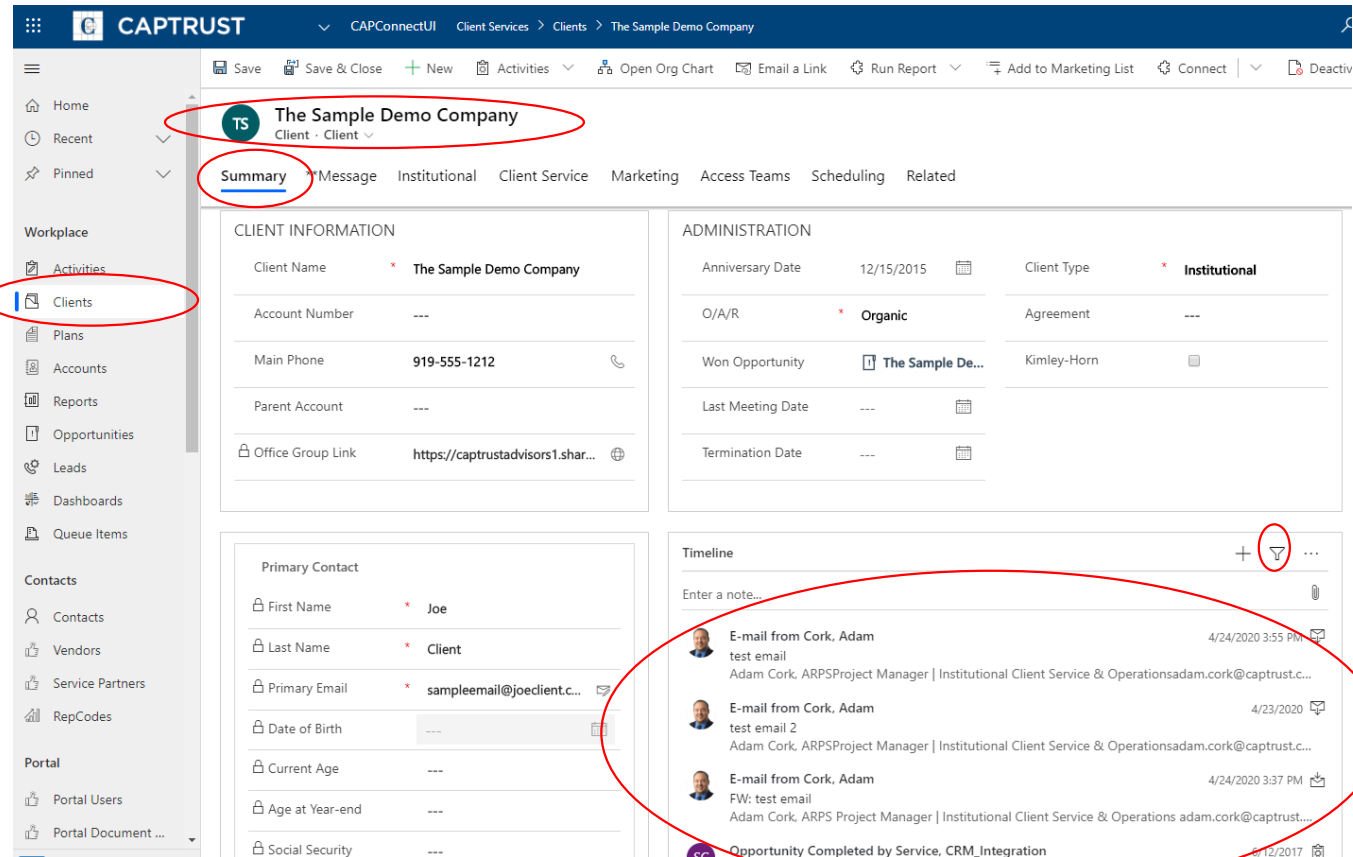
Once you select your record a green box will appear that says Tracked Regarding and the record tracked will appear below.

Any replies to a tracked email will also be tracked to the same record selected.

Tip: When searching for a record, to search the entire name, put a * in front of the word in your search. For example: if you search Sample, the name of the record needs to begin with Sample, so The Sample will not show up. If you instead search *Sample, then the entity The Sample will appear in the search.

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To locate the tracked email in CAPConnect, open the record you tracked the email to and on the Summary tab under the Timeline section you will see a list of activities for that record. By clicking the filter button  you can filter by Activity Type and select E-mail.







The screenshot displays the CAPTRUST CAPConnectUI interface. The top navigation bar shows the breadcrumb path: CAPConnectUI > Client Services > Clients > The Sample Demo Company. The left sidebar contains a menu with 'Clients' highlighted. The main content area shows the 'Summary' tab for 'The Sample Demo Company'. It includes sections for 'CLIENT INFORMATION' and 'ADMINISTRATION'. The 'Timeline' section at the bottom is circled in red and contains a list of activities, including three 'E-mail from Cork, Adam' entries and one 'Opportunity Completed by Service, CRM_Integration' entry. A filter button (funnel icon) is located at the top right of the timeline section.

CLIENT INFORMATION	
Client Name	The Sample Demo Company
Account Number	---
Main Phone	919-555-1212
Parent Account	---
Office Group Link	https://captrustadvisors1.shar...

ADMINISTRATION	
Anniversary Date	12/15/2015
O/A/R	Organic
Won Opportunity	The Sample De...
Last Meeting Date	---
Termination Date	---

Primary Contact	
First Name	Joe
Last Name	Client
Primary Email	sampleemail@joeclient.c...
Date of Birth	---
Current Age	---
Age at Year-end	---
Social Security	---

Timeline	
Enter a note...	
	E-mail from Cork, Adam test email Adam Cork, ARPSProject Manager Institutional Client Service & Operationsadam.cork@captrust.c... 4/24/2020 3:55 PM
	E-mail from Cork, Adam test email 2 Adam Cork, ARPSProject Manager Institutional Client Service & Operationsadam.cork@captrust.c... 4/23/2020
	E-mail from Cork, Adam FW: test email Adam Cork, ARPS Project Manager Institutional Client Service & Operations adam.cork@captrust.c... 4/24/2020 3:37 PM
	Opportunity Completed by Service, CRM_Integration 6/12/2017

Timeline

Enter a note...

Filter by

Record type ▾

Activity type ^

☒ E-mail (7)

☐ Opportunity Close (1)

☐ Task (1)