



AXPEXchangeSync

Product description

1 Overview

The product AXPEXchangeSync is designed to automate the process of synchronizing Dynamics 365 for Operations activities and contact information with Microsoft Exchange appointments, tasks, emails and contacts of mailboxes which are managed by client tools like Microsoft Outlook.

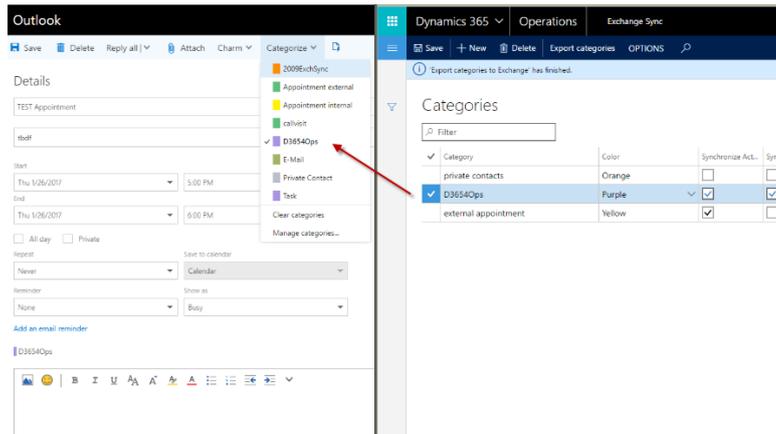
The process of synchronization is managed by batch jobs inside Dynamics 365 for Operations which communicate with Microsoft Exchange Server, which makes the process independent of the online status of the user or the platform the user uses to run Dynamics 365 for Operations and Microsoft Outlook client (e.g. Citrix).

2 Functions

2.1 Appointments

The user can create appointments in Dynamics 365 for Operations with attendees defined in the attendee table. When the appointment is marked to be synchronized with the Exchange mailbox (done by categories) of the owner of the activity, the batch job will export the appointment to the corresponding mailbox and send the invitations to the attendees.

The user can create an appointment in his outlook client and mark the appointment for synchronization (done by categories), as soon as his outlook client is synchronized with the Exchange Server, the appointment is ready for synchronization into Dynamics 365 for Operations.



The batchjob will import the appointment to Dynamics 365 for Operations and create a new activity connected to the employee attached to the mailbox. If the email-address of the attendees is recognized in Dynamics 365 for Operations contacts the activity will automatically be associated with the corresponding contact person, customer, vendor etc.

Updates of existing appointments can be done in Dynamics 365 for Operations or in the mailclient and will be updated on the other side.

2.2 Tasks

The user can create tasks in Dynamics 365 for Operations and mark them for synchronization. The batch job will export the task to the mailbox in Exchange server of the owner of the task.

The user can create tasks in his Outlook client and mark them for synchronization. As soon as his Exchange mailbox is updated from Outlook the task is ready for import to Dynamics 365 for Operations. The batch job will create a new activity with type task in Dynamics 365 for Operations for the employee connected to the mailbox.

Updates on existing tasks can be done in Dynamics 365 for Operations or in the mailclient and will be updated on the other side.

2.3 E-Mail import

The user can mark an email in his mailclient to be imported to Dynamics 365 for Operations. The batchjob will create a new activity in Dynamics 365 for Operations with type event. If the E-mail address is recognized in Dynamics 365 for Operations contacts, the activity will be associated to the contact person, customer, vendor etc.

2.4 Contact details

2.4.1 Private contact folder

The user is able to add a contact person in Dynamics 365 for Operations to his private contacts. Therefore the contact person has to have a category that is allowed to add to private contacts (so not all contact informations can be exported). When added to the private contact person, the Exchange batch job will export the contact information to the private contact folder of the employees Exchange mailbox.

The user can add new contacts in his private contact folder in his mailclient and mark them for synchronization. The Exchange batch job will import the new contact and create a new contact person in



Dynamics 365 for Operations, as the company detailed in contact information on Exchange side is known in Dynamics 365 for Operations.

Contact information on existing contacts can be updated on Dynamics 365 for Operations or Exchange side and will be updated on the other.

2.4.2 Public contact folders

Through a query, a range of contact persons can be defined, which will be exported to a public contact folder on Exchange Server, e.g. contact persons from devined sales districts.

Through Exchange Server security settings you can define which employees will have access to which contact folder with which rights (read, update, create, delete).

Contact information on existing contacts can be updated on Dynamics 365 for Operations or Exchange side and will be updated on the other.