



DYNAMIC MAILBOX

USER GUIDE



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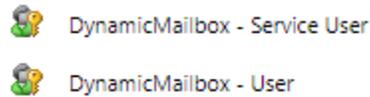
Security Role

In order to use Dynamic Mailbox, each user need to have the **Dynamic Mailbox User** security role.

Login to the system as the system administrator and then to **Settings, Security** and select **Users**.

Select the user you wish to give access and click on **Manage Roles** from the upper menu.

From the list of **Security Roles**, select **Dynamic Mailbox User** and click Ok.



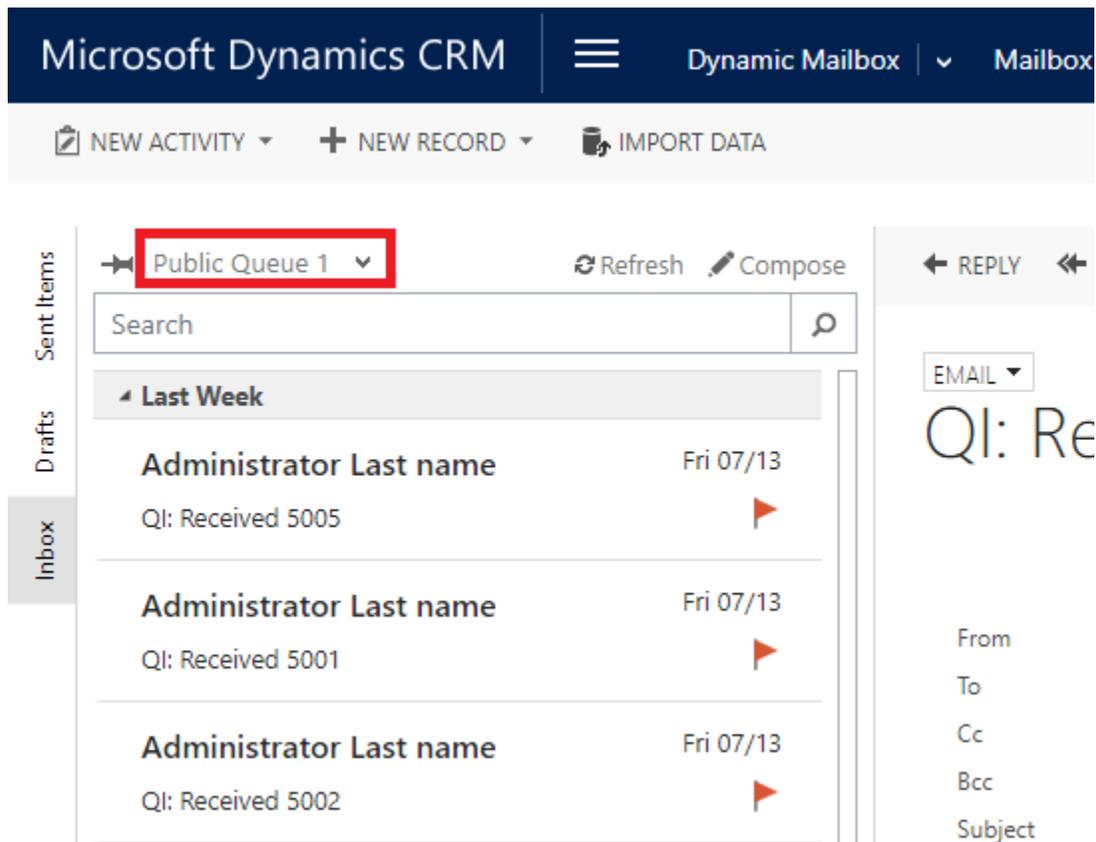
Mailbox Items

A user is able to quickly check sent and received emails of his own or for an active public queue.

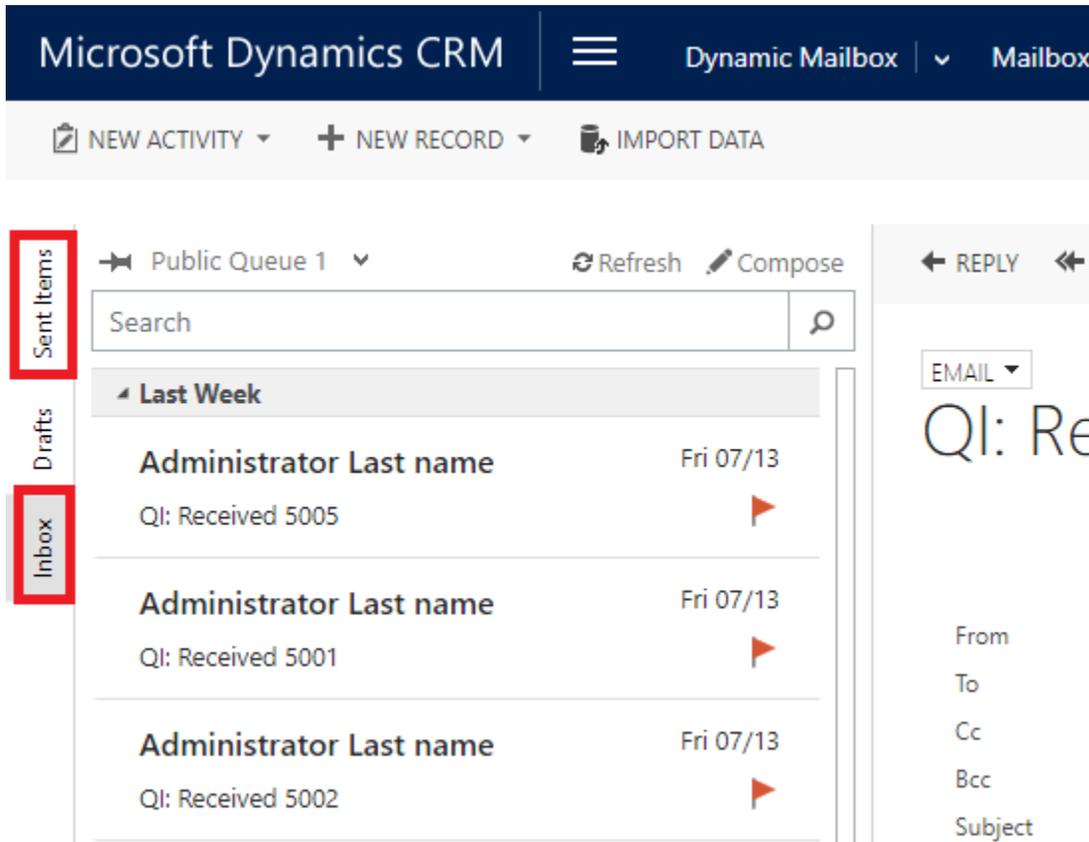
To select emails to be viewed, please follow the below steps:

Go to **Dynamic Mailbox** and select **Mailbox**.

From the Upper Left menu select the desired inbox **Public Queue** or **User** to check emails.



From the Upper Left side menu, select **Inbox** to check received emails of the selected inbox or **Sent Items** to check sent emails of the selected inbox or **Outbox** to check pending emails.



Select the email message to show its content on the right-hand side of the screen, where you can work with to Reply, Reply All, Forward, Convert To, Delete or Add to Queue.

N.B: You can double-click on the email to open it in a new window.

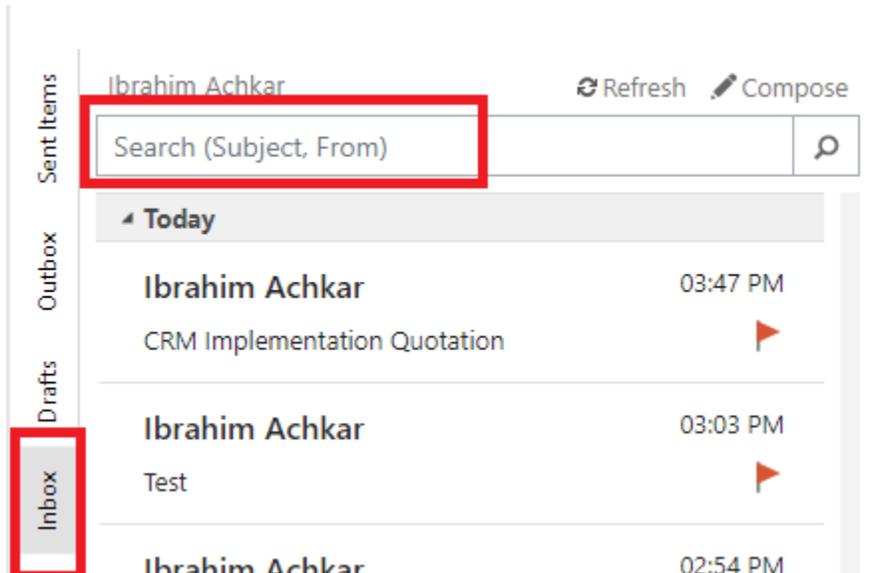


Search

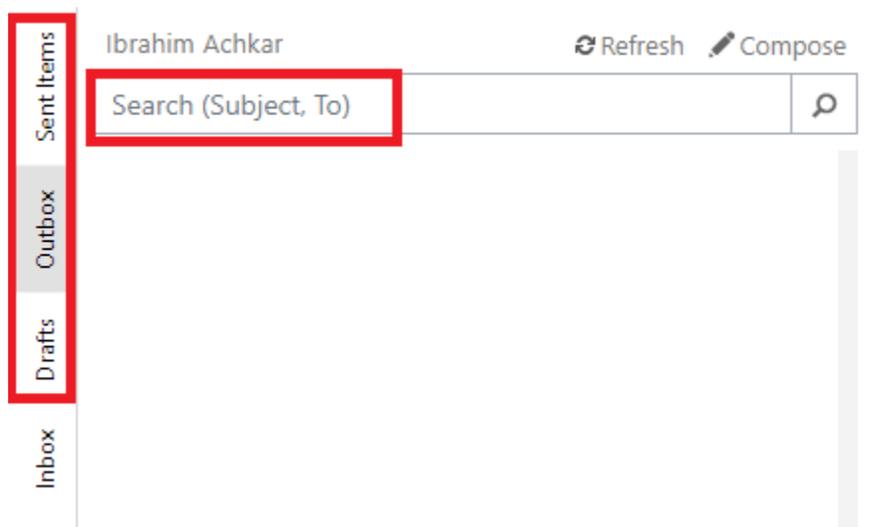
The search functionality in Inbox, Outbox, Sent Items and Draft tabs is simple.

In Dynamic Mailbox, beneath the Inbox selection; enter the search criteria you want and press Enter or click the Search button.

When searching Inbox, the system compares the entered data against the Subject of the emails or the name of the Sender.



When searching **Drafts**, **Outbox** and **Sent Items**, the system compares the entered data against the **Subject** of the emails or the **email address** of the **Receiver**.



Mark as Complete

A user is able to set emails as completed from personal and queue inboxes.

In **Dynamic Mailbox**, select the inbox (personal or queue), locate and click the email message you wish to set as completed.

Click on the **Red Flag** located on the message right hand side.

Wait until the flag becomes a **Green check mark**.

Search	Q
Mail Delivery System	01/07/2015
Undelivered Mail Returned to Sender	
Mail Delivery System	01/06/2015
Undelivered Mail Returned to Sender	
Mail Delivery System	12/17/2014
Undelivered Mail Returned to Sender	
Mail Delivery System	12/10/2014
Undelivered Mail Returned to Sender	

Draft Emails

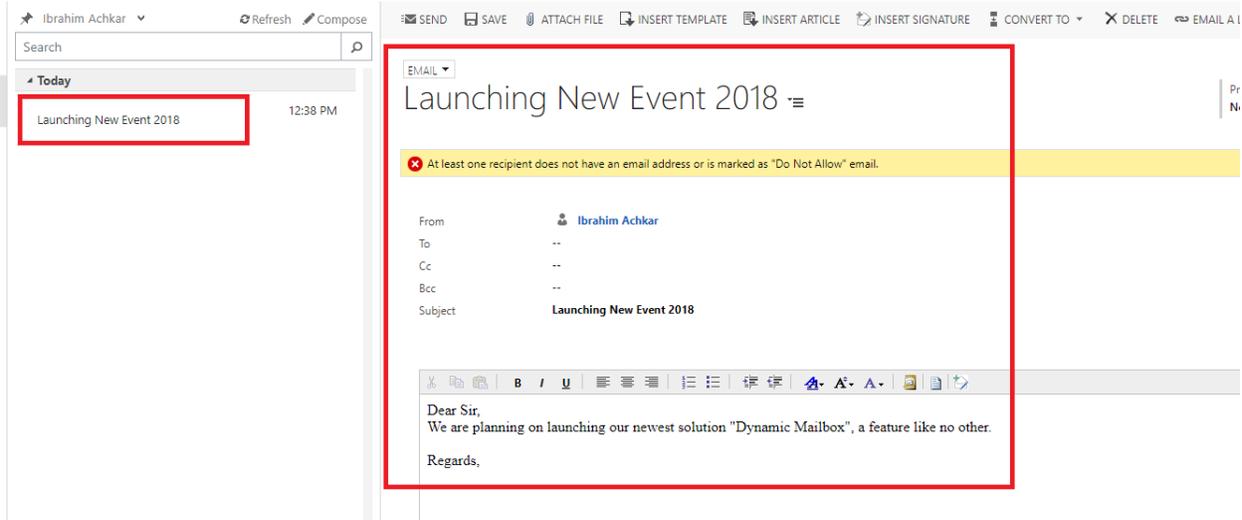
A user is able to check Draft emails, update and send emails from the Drafts section.

In **Dynamic Mailbox**, select **Drafts** section from Left Side Menu.

Select the email message you wish to **Review** and **Update** from the **left pane**; the **message contents** will be displayed on the **right-hand side**.

when the update is complete, click save if you wish to add more info to your email or attachments.

Click **Send** if you wish to send the email message from Dynamics 365.

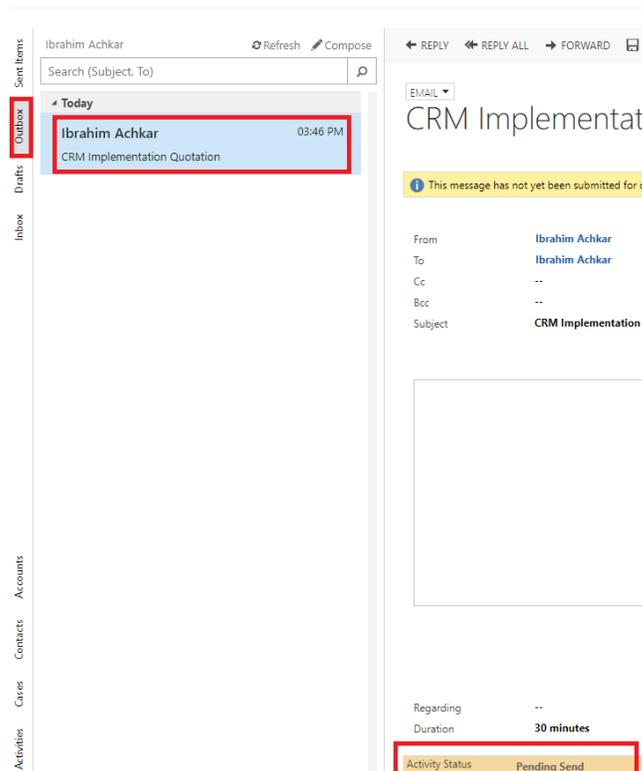


Outbox Emails

A user can check **Pending Send** and **Failed** emails from the **Outbox** section.

In **Dynamic Mailbox**, select **Outbox** section from Left Side Menu.

Select the email message you wish to **check its status** from the **left pane**; the **message contents** will be displayed on the **right hand side** with the **status** at the **left button** corner of the message.



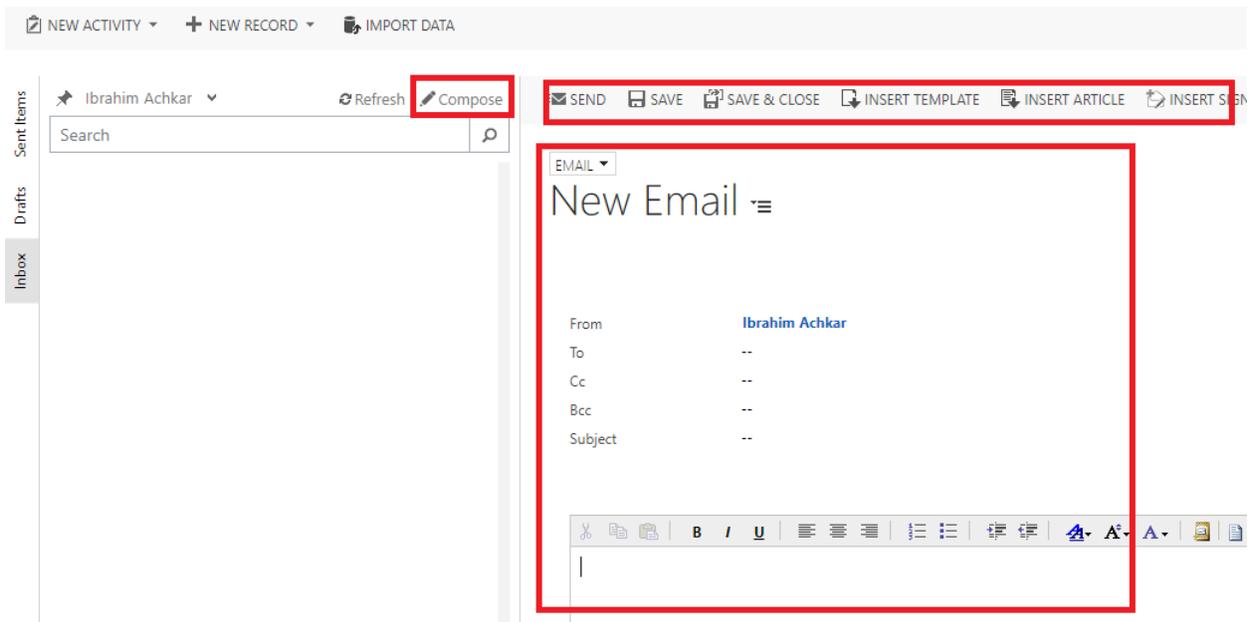
Upon **Update** completion, click save if you wish to add more info to your email or attachments. Click **Send** if you wish to send the email message from Dynamics 365.

Composing New Emails

A user can compose a new email directly from Dynamic Mailbox.

In **Dynamic Mailbox**, click **Compose**.

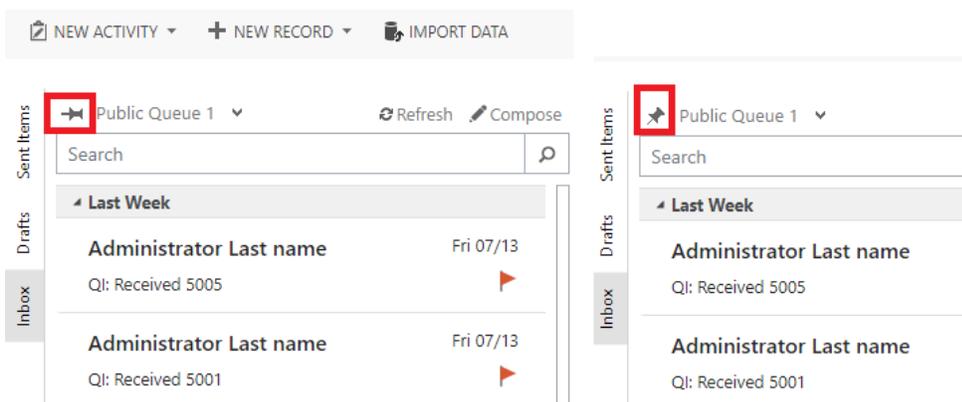
A new CRM email activity record opens on the right-hand side, fill in the details and click on **Save** or **Save & Close** if you want to finish it later or click **Send** if you completed your message.



Pin A Default Mailbox

Each user has the ability to pin a default mailbox.

In **Dynamic Mailbox**, select the **Mailbox** you want to pin as **Default**.

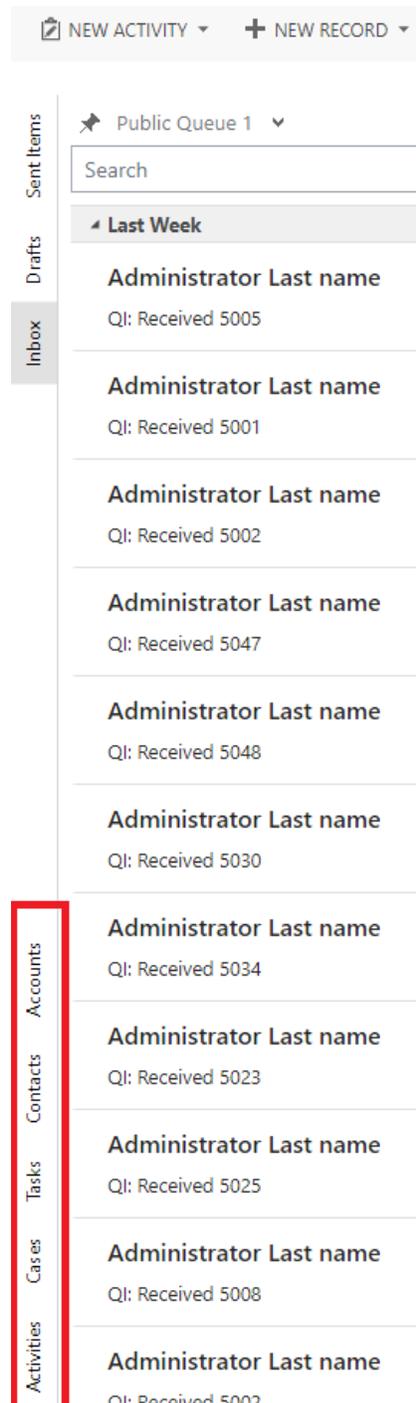


Entity Navigation Tab

The entity navigation tab is found on Dynamic Mailbox bottom left corner.

In **Dynamic Mailbox**, locate the **record type** (These are configured by your administrator) you wish to review on the **lower left side corner** of your Dynamic Mailbox screen.

Clicking on the record type will open the default view of that record type in a new tab.



NEW ACTIVITY ▾ + NEW RECORD ▾

Public Queue 1 ▾

Search

◀ Last Week

Administrator Last name
QI: Received 5005

Administrator Last name
QI: Received 5001

Administrator Last name
QI: Received 5002

Administrator Last name
QI: Received 5047

Administrator Last name
QI: Received 5048

Administrator Last name
QI: Received 5030

Administrator Last name
QI: Received 5034

Administrator Last name
QI: Received 5023

Administrator Last name
QI: Received 5025

Administrator Last name
QI: Received 5008

Administrator Last name
QI: Received 5002

Sent Items
Drafts
Inbox
Accounts
Contacts
Tasks
Cases
Activities