Dynamics 365 App for Outlook User Guide

Applies to Dynamics 365 for Customer Engagement apps version 9.x

Important

The latest release of Dynamics 365 App for Outlook, works with Dynamics 365 for Customer Engagement apps version 9.0 or later only. For a prior release that works with earlier versions of Dynamics 365 for Customer Engagement, see [Deploy Dynamics 365 App for Outlook](#).

Use Dynamics 365 App for Outlook to tap the power of Customer Engagement while you're using Outlook on the desktop, web, or phone. When Dynamics 365 App for Outlook is installed, depending on which version of the app you have installed, you'll see a **Customer Engagement** pane or window next to a selected Outlook email message, or when you're composing an email message or setting up a meeting or appointment.

For example, when you open an email message, view information from Customer Engagement about the email recipients. Or with a single click, link an Outlook email message or appointment to a specific Customer Engagement record. When you link an email message or appointment to a Customer Engagement record, the Outlook record appears as an activity for that record in Customer Engagement.

Known issues and FAQs

For known issues with this version of Dynamics 365 App for Outlook, see the [Dynamics 365 for Customer Engagement apps Readme](#).

For more information on FAQ's, see [Frequently Asked Questions about Dynamics 365 App for Outlook](#).

Prerequisites

Your Customer Engagement system administrator can make Dynamics 365 App for Out-look available to your organization or you can add it yourself if:

- You have the **Use Dynamics 365 App for Outlook** security privilege.

- Your organization synchronizes mailboxes with server-side synchronization.

   For more information, and for information on supported devices, browsers, and Outlook versions, see Deploy Dynamics 365 App for Outlook.

Add the app to Outlook

After the prerequisites have been met, you can add the app directly from Customer Engagement.

1. Click the **Settings** button

   Dynamics 365 for Customer Engagement apps web client Settings button   , and then click **Apps for Customer Engagement**.

2. On the **Apps for Customer Engagement** page, under **Dynamics 365 App for Outlook**, click **Dynamics 365 App for Outlook**.

   Note

   If you have trouble installing the app, see the troubleshooting section in Deploy Dynamics 365 App for Outlook.

Disable or remove the Outlook app

1. In Outlook, click **File**, and then click **Manage Add-ins**.

   Manage the Dynamics 365 App for Outlook add-in

This opens the **Office 365** dialog box where you can see all your Outlook add-ins. If you click the Customer Engagement row, you can see which Customer Engagement instance the app is connected to.

2. Do one of the following:

   ◦ To disable the app, in the Customer Engagement row, clear the **Turned on** check box.

   ◦ To remove the app, select the Customer Engagement row, and then click the Minus button.

Terminology

Term	Definition
Set regarding	Track and link the email or appointment to an existing record in Dynamics 365 for Customer Engagement apps.
Tracking	Create a copy of the email or appointment in Dynamics 365 for Customer Engagement apps.

Use the app for the first time

To display Customer Engagement data after you've added the app:

1. Select an existing email message in your Inbox, or create a new email message or appointment.

2. On the ribbon, click the **Customer Engagement** button.

   Dynamics 365 App for Outlook ribbon

   -Or-

   In Outlook on the web, click the **Customer Engagement** button in the email pane.

   Dynamics 365 for Customer Engagement apps button

The **Customer Engagement** pane appears on the right side of the screen and shows information about the recipients.

Notes:

If the recipient is a Customer Engagement user (as opposed to a contact or lead), it's indicated above their name:

Dynamics 365 for Customer Engagement apps user

If the recipient isn't known to Customer Engagement, click (+) and then select **Add as contact** or **Add as lead**. See: Add an email recipient as a contact or lead.

A quick tour of the interface

Much has changed in the app for Dynamics 365 for Customer Engagement apps version 9.0. Here's what you see when you first open Dynamics 365 App for Outlook.

The **Customer Engagement** pane appears under the menu bar and shows information about the recipients.

Dynamics 365 App for Outlook pane

Element	Description
1	The Dynamics 365 for Customer Engagement apps record this email is linked to.
2	Summary information about the recipient.
3	Summary information about the recipient's account.
4	Shows if the email message or meeting is linked to a record and if it's being tracked.
5	Click to set or change linking and tracking. You can also choose to view your email in Dynamics 365 for Customer Engagement apps version 9.0.
6	Click to add an activity.
7 & 8	Click and then select **Set Regarding** to link to the record.

Dynamics 365 App for Outlook pane

Element	Description

Element	Description
1	Your last activity with the recipient.
2 & 3	Recent records for the recipient.
4	Click for options related to list of activities.
5	Click for options related to the activity. The options vary by activity.
6 & 8	Click for options related to the list of records.
7 & 9	Click for options related to the record.

Let's go over the individual elements in the menu bar.

Experience App for Outlook as a pinnable taskpane

If you're running Outlook 2016 for Windows (click to run build 7668.2000 or later), App for Outlook will appear as a pinnable vertical taskpane to the right of an open message or appointment in Outlook. For more information, see Implement a pinnable taskpane in Outlook.

Add an email recipient as a contact or lead

One of the first things you might want to do when you receive a customer email, is add the person as a contact or lead to Customer Engagement. In the **Customer Engagement** pane, click (+) and then select **Add as contact** or **Add as lead**.

Add a contact or lead

Note

If the sender of the email is unknown to Customer Engagement, when you add the contact or lead, the email is automatically tracked in Customer Engagement and set regarding this contact or lead. To stop tracking, you can manually untrack the regarding email.

Link an email message or meeting to a specific Dynamics 365 for Customer Engagement apps record

You can link an email message or meeting to a specific Customer Engagement record, such as an account, opportunity, or case. This also tracks the email or meeting in Customer Engagement.

1. Create or select an email or meeting.

2. Click the **Customer Engagement** button in the email pane.

3. Click **Set Regarding** (---).

   Set Regarding

4. Enter search text. A list of related records appears.

   Search for related records

5. Use the left and right arrows to narrow search to cases, invoices, etc., and then select a record to automatically track the email or meeting, and link it to the record indicated in the **Customer Engagement** pane.

Find a different record to link to

1. Find the record to link in a list or using Search.

2. In Tracked regarding, click (...) > **Change Regarding**.

   Change Regarding

3. Click **Set Regarding** (---).

   Set Regarding

4. Enter search text. A list of related records appears.

   Search for related records

5. Use the left and right arrows to find related cases, invoices, etc., and then select a record to automatically track the email or meeting, and link it to the record indicated in the **Customer Engagement** pane.

Create a new record

1. Click **Quick Create**, and then select the type of record you want to create.

   Add new record

2. Fill in the information in the form.

   Create new record in Quick Create form

3. Click **Save**.

View the linked email in Dynamics 365 for Customer Engagement apps

1. Find the linked record in a list or using Search.

2. In Tracked regarding, click (...) > **View email in Dynamics 365 for Customer Engagement apps**.

   View email in Dynamics 365 for Customer Engagement apps

Untrack the regarding record

1. Find the record to link in a list or using Search.

2. In Tracked regarding, click (...) > **Untrack**.

   Untrack Regarding

Track signed S/MIME emails

Dynamics 365 App for Outlook can track S/MIME signed emails in Outlook Desktop and Outlook Web App (OWA). This is enabled on Click-to-Run Outlook 2016 build 16.0.8730.1000 or later. To determine your Outlook version, go to **File** > **Office Account** > **About Outlook**.

Compose an email message and link it to a Dynamics 365 for Customer Engagement apps record

Create an email message and then follow the steps in [Link an email message or meeting to a specific Dynamics 365 for Customer Engagement apps record](#).

Gain insights into your activities with relationship assistant

The relationship assistant is designed to deliver the most important and relevant information in relation to what you are doing right now. The assistant works by analyzing all of the data at its disposal and generating a collection of action cards, each of which includes a message summarizing what the card is about, plus a set of links for taking action. The assistant sorts the cards by priority and filters them for your current context.

Some of what the assistant can do for you:

- reminds you of upcoming activities
- evaluates your communications and suggests when it might be time to reach out to a contact that's been inactive for a while
- identifies email messages that may be waiting for a reply from you
- alerts you when an opportunity is nearing its close date

When you start your day by signing in to Dynamics 365 for Customer Engagement apps, the assistant draws your attention to your most important items and tasks, drawn from all areas of the application.

To access the assistant, on the nav bar, click   Menu - Insights   > **Relationship Assistant**.

Relationship Assistant

Add an email template when you create an email message

If you frequently send the same type of email, you can save time by using an email template. When you use an email template, Dynamics 365 App for Outlook automatically inserts the Customer Engagement information such as contacts or set regarding information in the email message.

For example, you could use a Thank you template to save time whenever you want to send a thank you message to a customer.

Email template in Dynamics 365 App for Outlook

Note

You must have the appropriate permissions to add email templates.

Add an email template

1. Create an email message as you normally would in Outlook.

2. At the top of the **Customer Engagement** pane, click **Document** > **Add Template**.

   Add an email template

3. Select the record type (entity). The default is the set regarding record. Then, click **Select**.

   Select the entity

4. Start a search for the template you want. Under **Search Template**, click (---).

Select search

5. Search for and select the template you want.

Search for email template

6. Accept the selected email template.

Accept the template

7. Click **Add to Email** to add the template to your email.

Add the template to email

The template text appears in your email.

Template text in email

For information on creating email templates in Customer Engagement, see [Create templates for email](#).

Add sales literature or a knowledge base article when you create an email message

When you're working with a customer, you might want to send them some sales literature or a knowledge base article.

Note

You must have the appropriate permissions to add sales literature or knowledge base articles to an email message.

1. Create an email message as you normally would in Outlook.

2. At the top of the **Customer Engagement** pane, click **Document**.

Add a document

3. Select **Add Sales Literature** or **Add Knowledge Article**, and then follow the steps to add or insert the literature or article.

Add a phone call, appointment, or task activity to Dynamics 365 for Customer Engagement apps

1. For the record you have linked and are tracking, in Tracked regarding, click (…) > **Add Activity**.

   Click Add Activity

2. Select an activity.

   Select activity

3. Fill in the information in the form.

4. Click **Save**.

Track Outlook contacts in Dynamics 365 for Customer Engagement apps

You can track Outlook contacts in Customer Engagement by using the Customer Engagement add-in, an Outlook solution module. The add-in is automatically installed when you install Dynamics 365 App for Outlook. You can access it as described below.

Note

Delegated users can not use Dynamics 365 App for Outlook to track emails.

Using the add-in, you can:

- View a list of Microsoft Office contacts or Customer Engagement contacts, and see which contacts are tracked

- Link contacts to accounts in Customer Engagement

- Open the Customer Engagement contact or account record with a single click

When the Customer Engagement add-in is installed, you'll see a new **Customer Engagement** tab on the Outlook ribbon. Click the tab to see information about contacts.

Dynamics 365 App for Outlook add-in overview screen

Element	Description
1	Click to see all your Outlook contacts (contacts displayed in your default contacts view in Customer Engagement).
2	Click to see all your Customer Engagement contacts.
3	See whether a contact is tracked or not, or whether tracking status is pending.
4	Open a Customer Engagement account record.
5	Click to call.
6	Click to email.

Note

To use the add-in your admin must enable your Customer Engagement mailbox for appointments, contacts, and tasks.

Access the add-in

In the lower-left corner of the Outlook window, click the **Dynamics 365 for Customer Engagement apps add-in**.

Click Dynamics 365 for Customer Engagement apps add-in

See the Dynamics 365 for Customer Engagement apps contact card for a contact

1. In the contacts list, select the check box next to the contact. The contact details appear on the right side of the screen.

    Dynamics 365 App for Outlook contact tracking contact card

Track or untrack a contact

1. Click the **Outlook Contacts** tab.

2. In the contacts list, select the check box next to the appropriate contact(s).

3. On the ribbon, click **Track** or **Untrack**.

   Dynamics 365 App for Outlook contact tracking ribbon

   Important

   Do not navigate outside the page while tracking or untracking the contact. Otherwise, it won't be tracked or untracked.

Link a contact to an account or change the account that a contact is linked to

1. Click the **Outlook Contacts** tab.

   Note

   You can't select a contact listed under the **Customer Engagement Contacts** tab.

2. In the contacts list, select the check box next to the appropriate contact.

3. On the ribbon, click **Link**.

4. Do one of the following:

   - On the right side of the screen, select the account to link to, and then click **Link** at the bottom of the screen.

     -Or-

   1. To create a new account, on the right side of the screen, click **New** at the bottom of the screen.

   2. Enter the new account name.

3. Click **Save**.

4. Click the **Refresh** button.

Note

If the contact isn't already tracked, the contact will be tracked immediately and will be linked to the account. The account record will be synchronized in the next synchronization cycle.

Send email or schedule an appointment

1. Click the **Customer Engagement Contacts** tab, or the **Outlook Contacts** tab, and then select the check box next to the appropriate contact(s).

2. On the ribbon, click **Email** or **Appointment**.

Regardless of which tab you selected in step 1, the email, task, or appointment will be sent from Outlook, not Customer Engagement.

Search for a contact

- Enter a value in the search box. You can search for data stored in the **Full name**, **Company**, **Department**, and **Business address** fields. You can't search for data stored in the **Tracking status**, **Business phone**, or **Email** fields.

Filter by all contacts, tracked contacts, or untracked contacts

1. Click the arrow next to the view drop-down.

2. Select the view you want.

Dynamics 365 App for Outlook with contract tracking filter drop-down

Track appointments from another person in your organization

You can track appointments from another person in your Dynamics 365 for Customer Engagement apps organization using Dynamics 365 App for Outlook. To enable this capability, you need to enable the OrgDBOrgSetting in your organization. Dynamics 365 for Customer Engagement apps provides the OrgDBOrgSettings tool that gives administrators the ability to implement specific updates that were previously reserved for registry implementations.

1. Follow the instructions in this article for steps to extract the tool.
2. After extracting the tool, enable the *OrgDBOrgSetting TrackAppointmentsFromNonOrganizer*.

You can also use this tool to edit the *OrgDBOrgSetting TrackAppointmentsFromNonOrganizer*.

After the *OrgDBOrgSetting* is enabled, when you open Dynamics 365 App for Outlook on an appointment created by another user in your organization, you can track the appointment. You will no longer see the banner blocking you from tracking the calendar item.

Track appointments

Synchronization and tracking

The Dynamics 365 App for Outlook tracks and synchronizes your mail and calendar data between Outlook (Exchange) and Dynamics 365 for Customer Engagement apps. Server Side Synchronization is an asynchronous service that runs in the background approximately every 15 minutes to synchronize items between Exchange and Dynamics 365 for Customer Engagement apps. In most scenarios, the Outlook item is immediately created in Dynamics 365 for Customer Engagement apps. However, in some cases, Server Side Synchronization service is used to promote the item to Dynamics 365 for Customer Engagement apps and keep it synchronized, which may take up to 15 minutes. The below table provides a brief explainer of the behavior.

Outlook app sync

Note

Server Side Synchronization is used to promote emails when Microsoft Outlook includes images in email signatures as attachments.

If the Dynamics 365 App for Outlook uses Server Side Synchronization to track an item to Dynamics 365 for Customer Engagement apps, the track status of the item will be "Pending".

Outlook app server side sync

See also

[Deploy Dynamics 365 App for Outlook](#)
[Set up server-side synchronization (admins)](#)