



ServerSys

Microsoft Dynamics 365
Introducing the
App for Outlook

Microsoft Partner

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Dynamics 365 App for Outlook at-a-glance

Use the Dynamics 365 App for Outlook to access Dynamics while using Outlook across devices.

- **Simplify data capture** with reduced manual data entry.
- **Save time** by minimising switching between interfaces.
- **Quickly find CRM information** directly in Outlook.
- **Associate emails** with specific CRM records.
- **Manage Dynamics 365 tasks** from Outlook.
- **Save Outlook meeting invites** to related a Dynamics 365 record.



Opening the Dynamics 365 App for Outlook

Gavin Jones
To: Warren Butler

Hi Warren,

A month ago, I did approach you about being involved in the Innovation & Excellence Awards. I am not of my messages?

We still allowing entries in a number of open categories so if taking part was of interest then do let me

Kind regards,

Tue 11/06/2024 10:50

Click the apps icon from the email actions bar.

Select the Dynamics 365 app.

Copilot for Sales for Microsoft ...
Send to OneNote
Share to Teams
Viva Insights
Dynamics 365
Add apps +

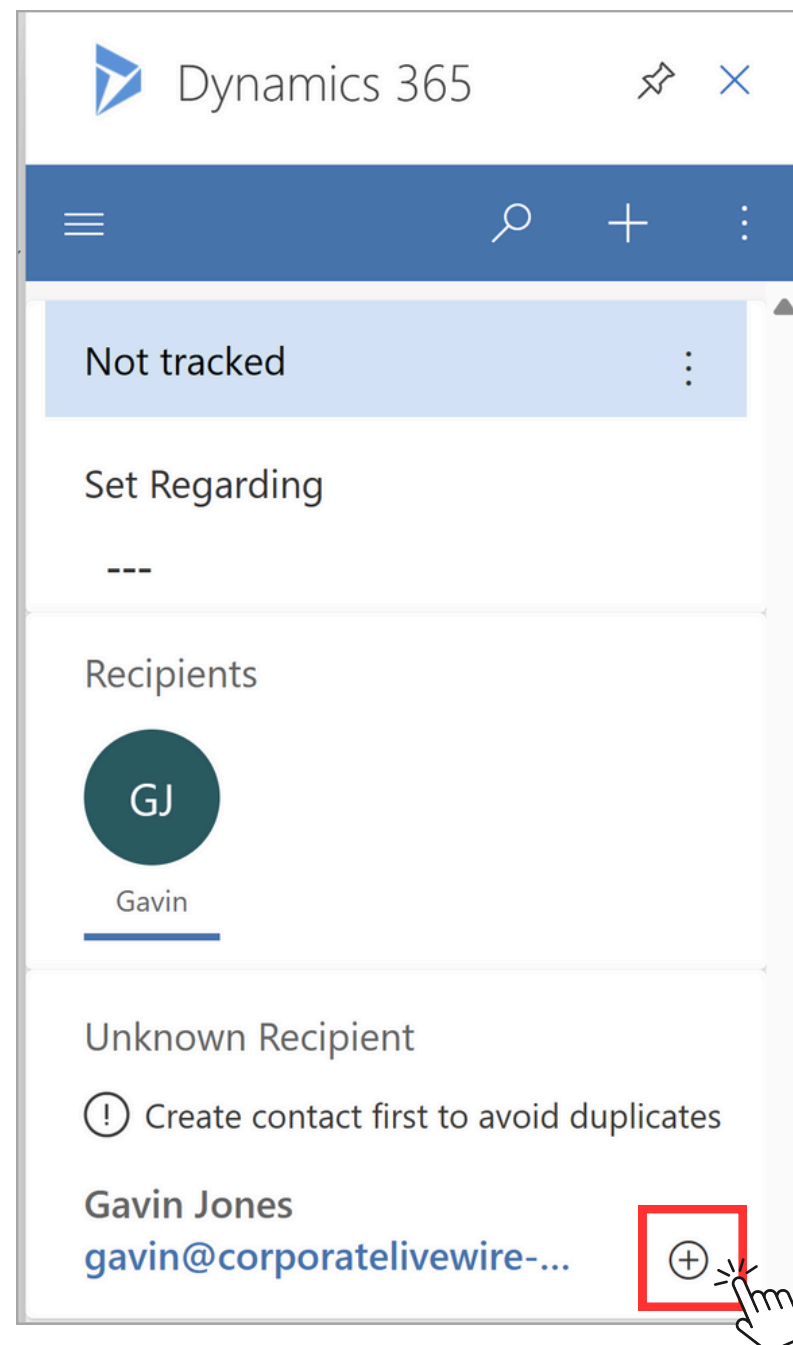
Opening the Dynamics 365 App for Outlook

Pin the Dynamics 365 app to the Outlook interface.

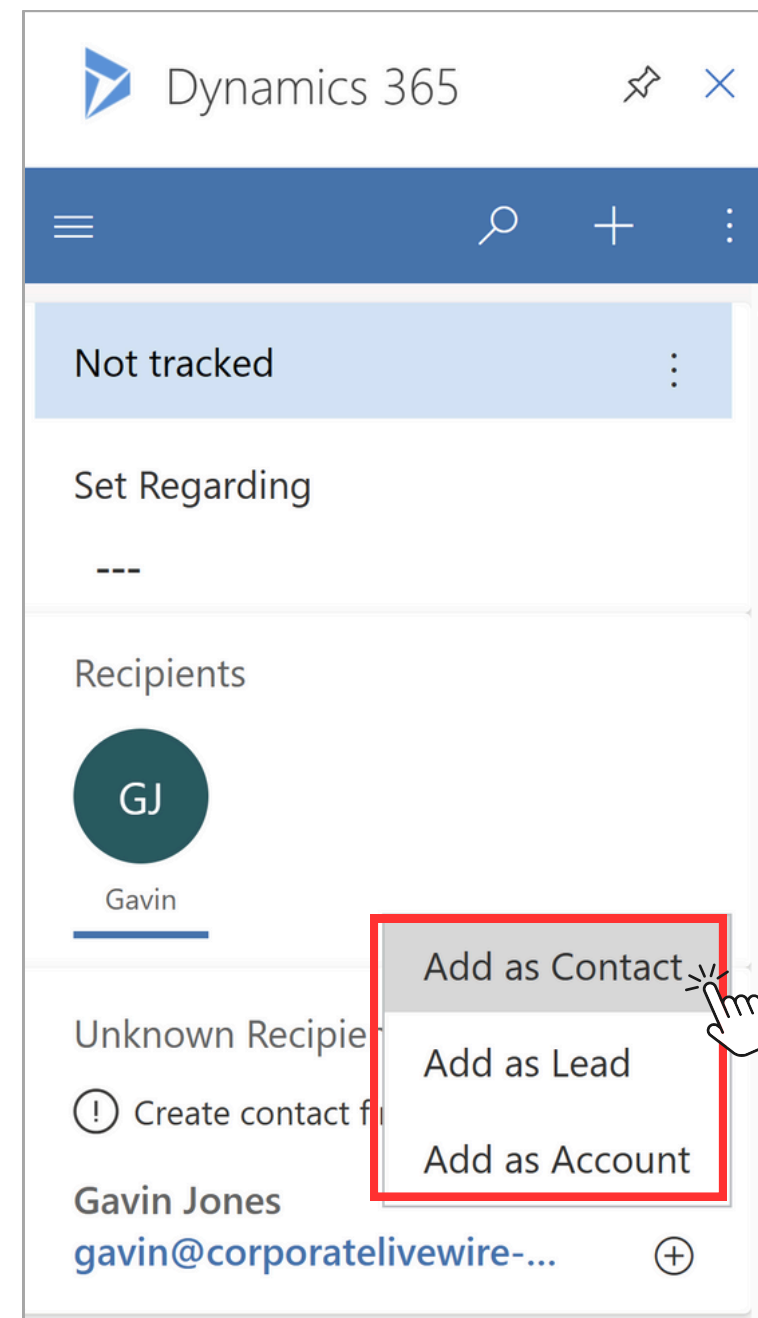
The screenshot displays the Outlook web interface. At the top, the 'ServerSys' logo is on the left, followed by 'Outlook' and a search bar. The main area is divided into three panes. The left pane shows the 'Home' tab with various action buttons like 'New', 'Delete', 'Report', 'Reply', 'Forward', 'Move', 'Sweep', 'Rules', 'Quick steps', 'Read / Unread', 'Flag', and 'Pin'. The middle pane shows an email from Gavin Jones to Warren Butler, dated Tue 11/06/2024 08:50. The right pane shows the Dynamics 365 app interface, which is currently unpinned. A red box highlights the 'Pin' icon (a pushpin) in the top right corner of the Dynamics 365 app header, and a hand cursor is shown clicking it. Below the app header, the Dynamics 365 interface shows a 'Not tracked' status, 'Set Regarding' options, and a list of recipients including 'Gavin Jones' and 'Unknown Recipient'.

Create a new contact to Dynamics from an email

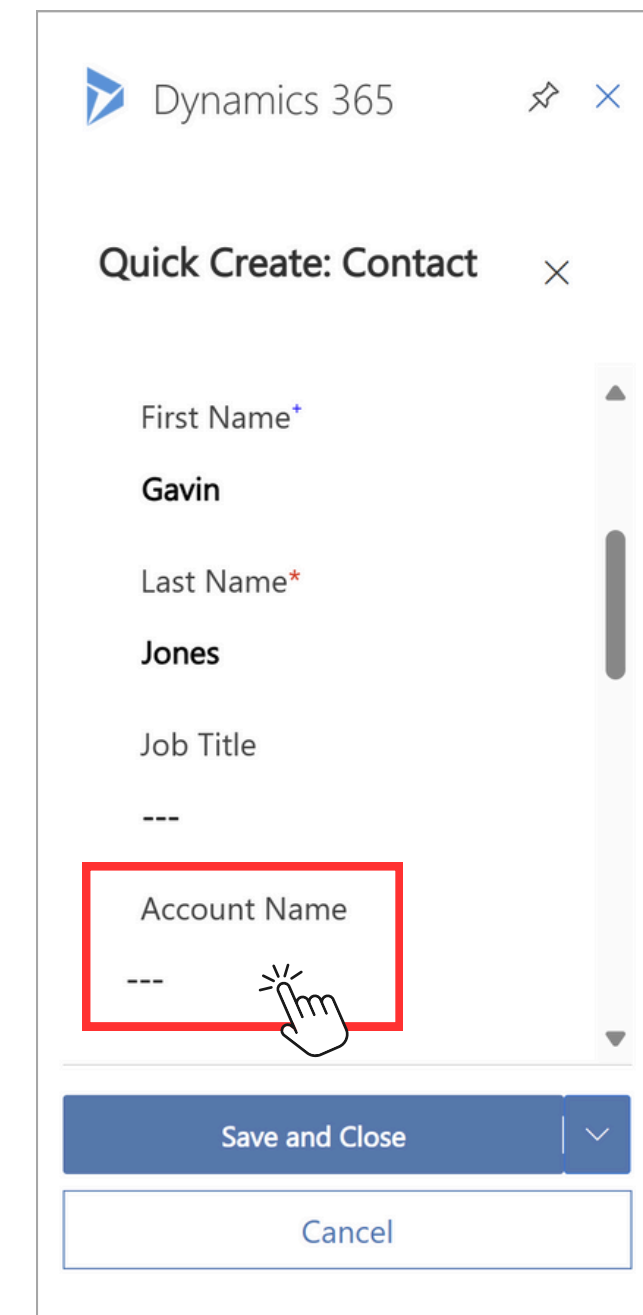
Click to create a CRM Contact from an Outlook email.



Select the option to add as a Contact.

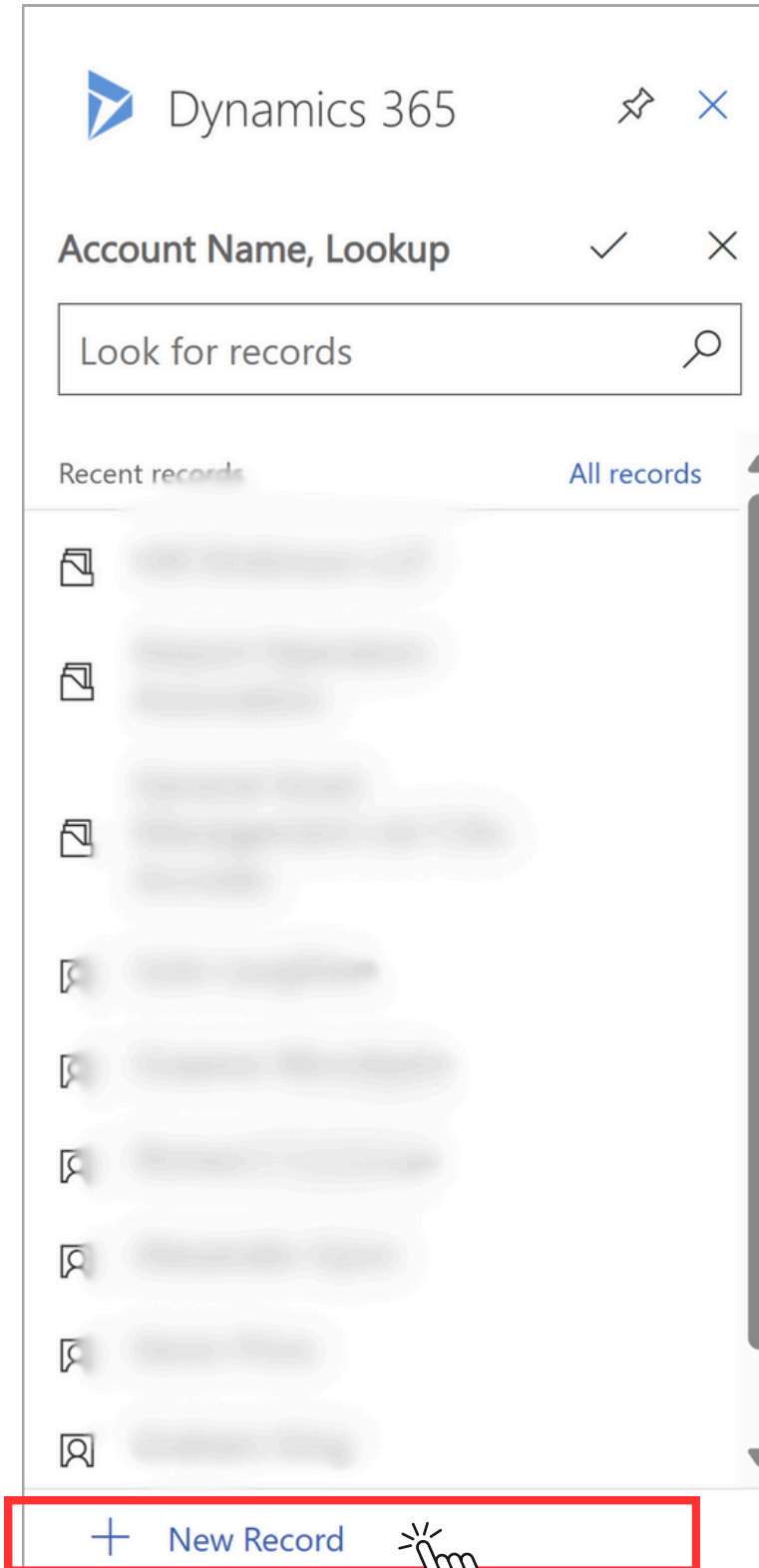


The Dynamics quick create form is part-populated with contact details from the email. Before saving the new contact a related Account record can also be added.



Creating a Dynamics account from an Outlook email

Click the New Record option.



Dynamics 365

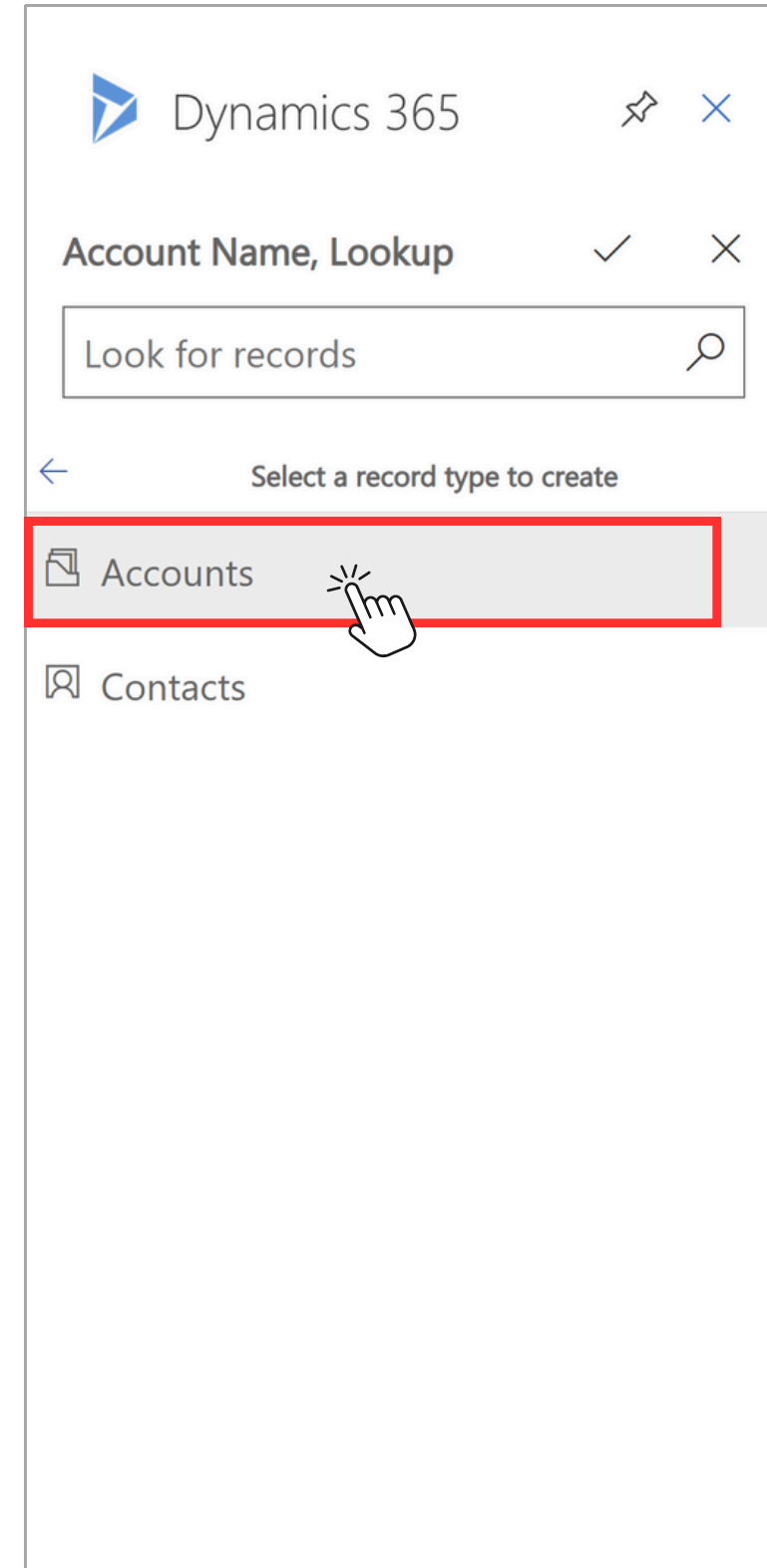
Account Name, Lookup ✓ ✕

Look for records 🔍

Recent records | All records

+ New Record

Select Accounts to open the Quick Create form.



Dynamics 365

Account Name, Lookup ✓ ✕

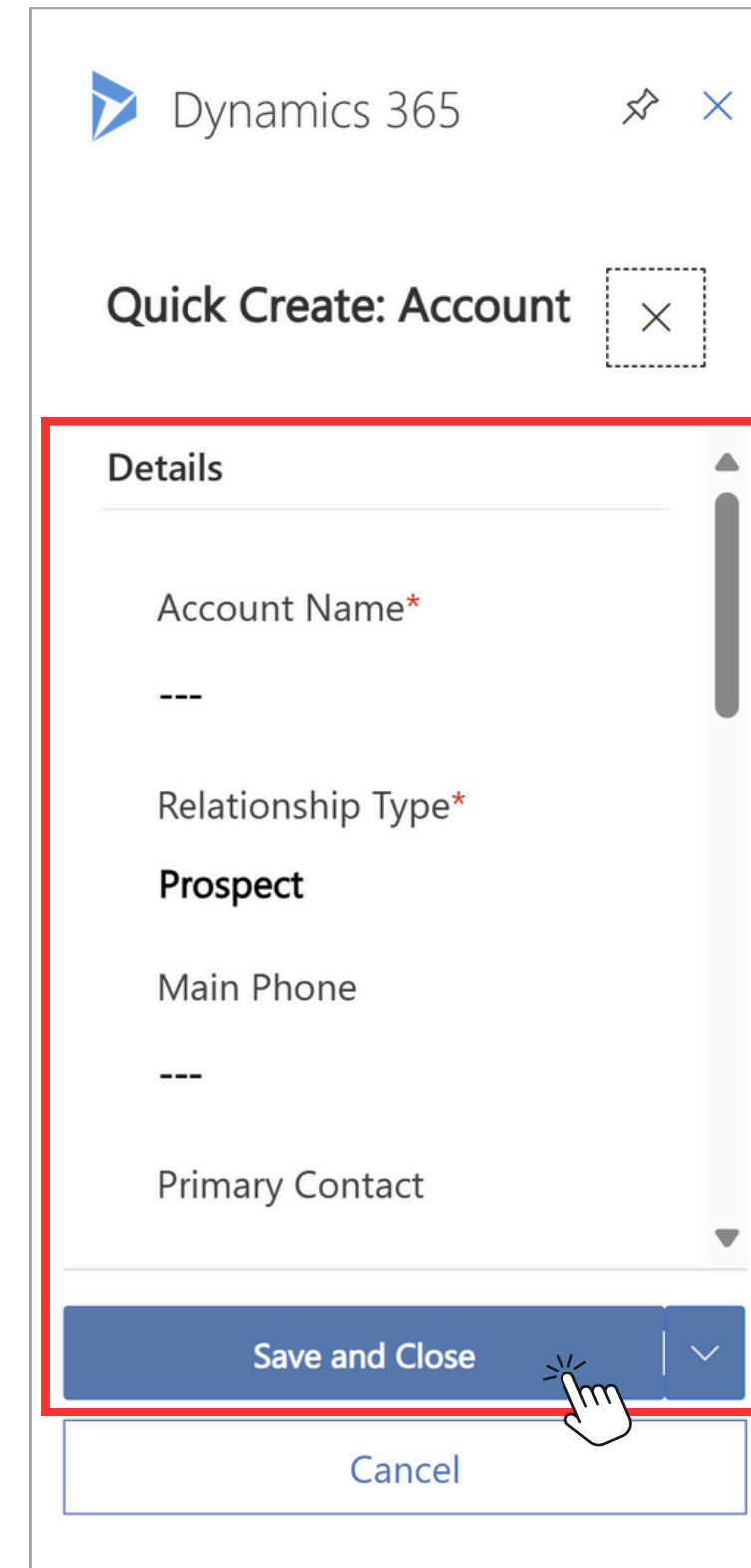
Look for records 🔍

Select a record type to create

Accounts

Contacts

Complete the Account form to save the record in Dynamics 365.



Dynamics 365

Quick Create: Account ✕

Details

Account Name*

Relationship Type*
Prospect

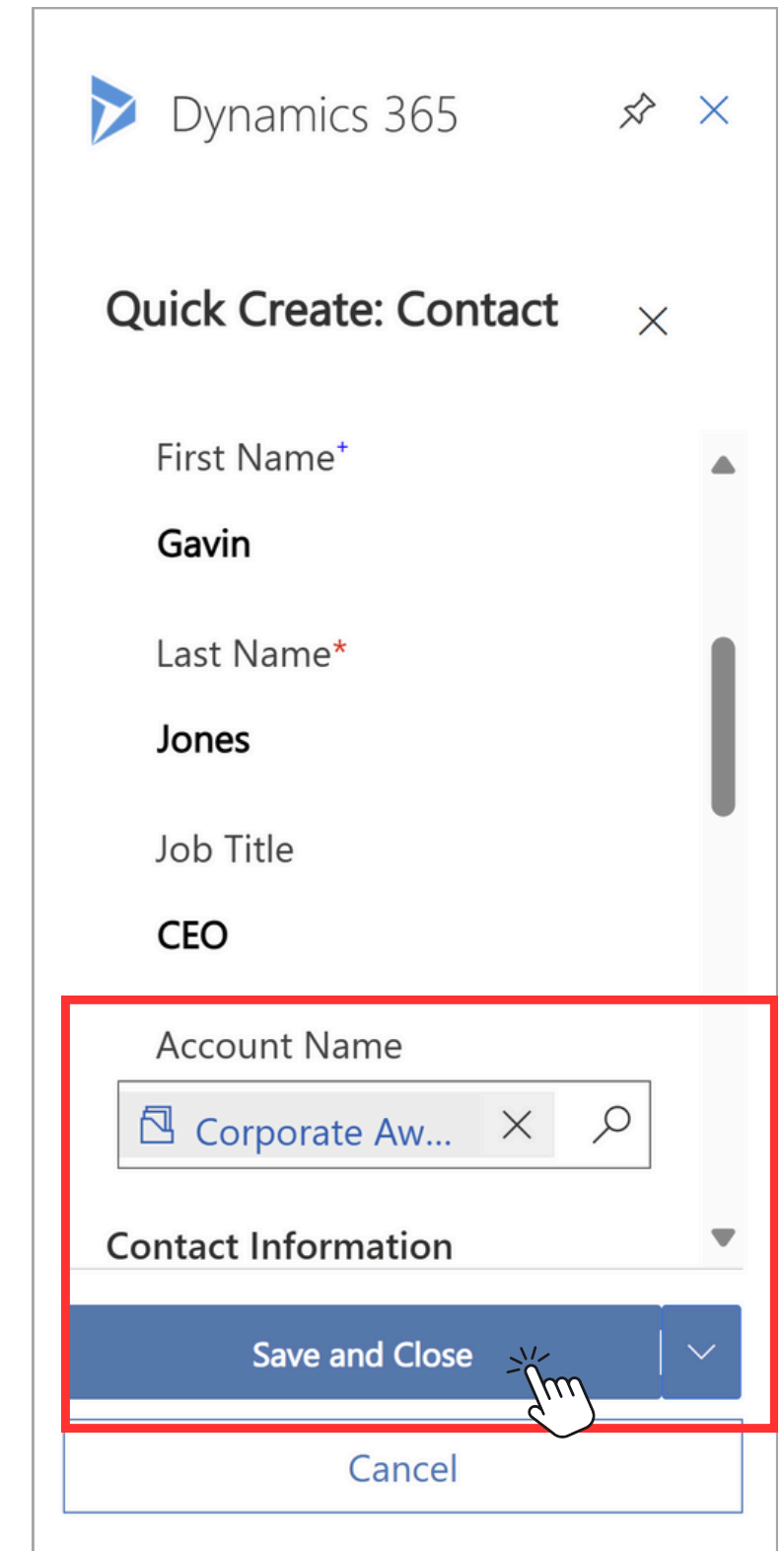
Main Phone

Primary Contact

Save and Close

Cancel

The new Contact can now be saved with related Account.



Dynamics 365

Quick Create: Contact ✕

First Name+
Gavin

Last Name*
Jones

Job Title
CEO

Account Name
Corporate Aw... ✕ 🔍

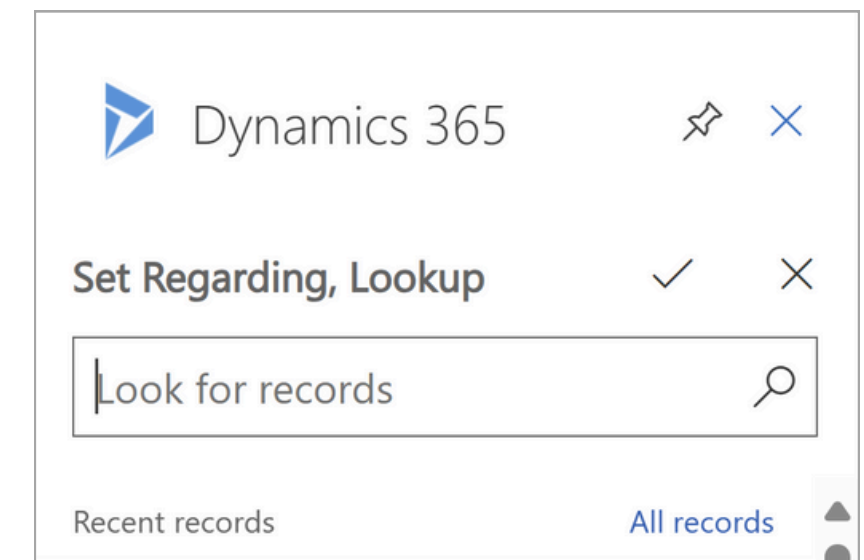
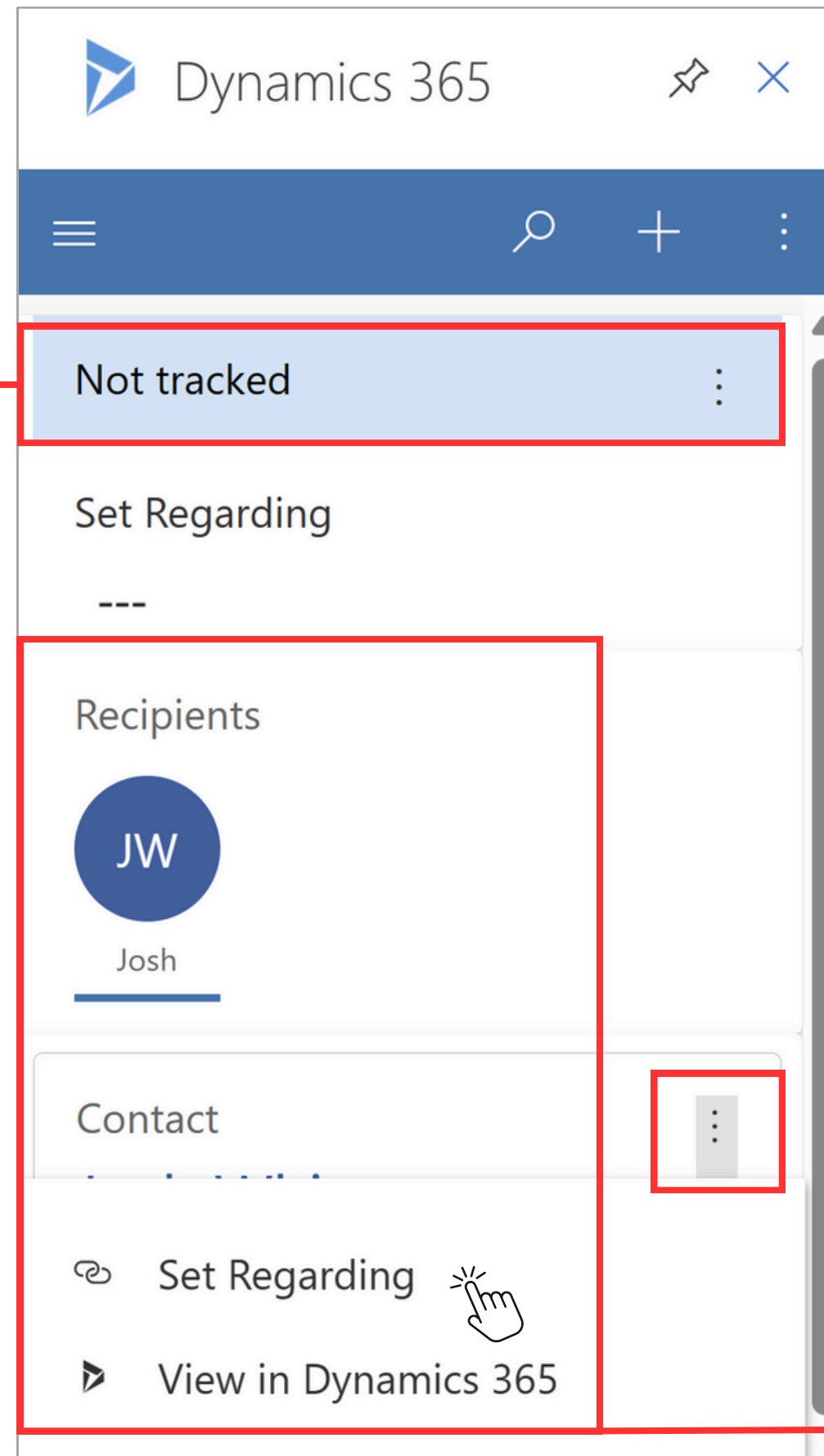
Contact Information

Save and Close

Cancel

Track an Outlook email to a Dynamics 365 contact

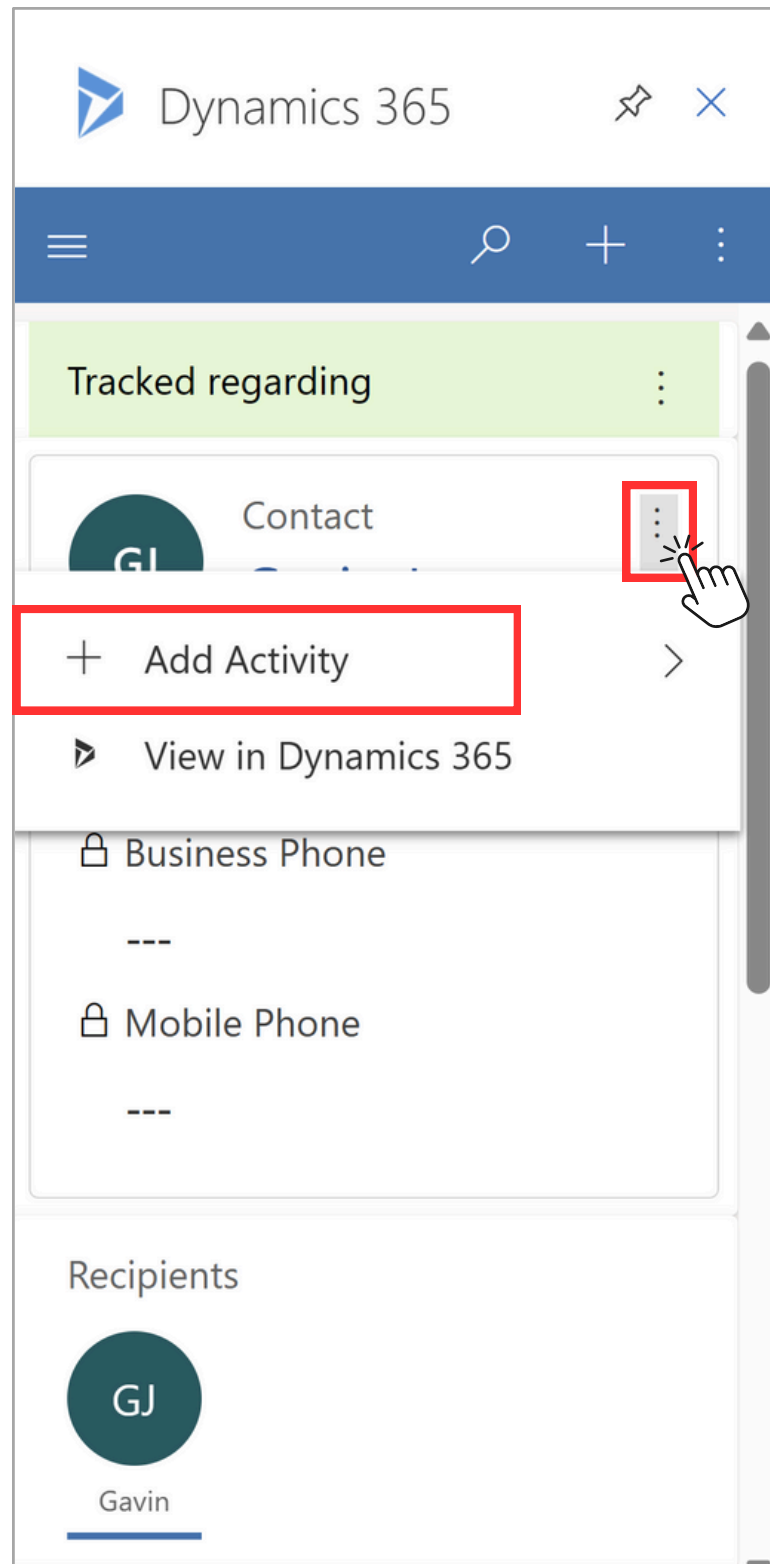
Quickly see if an email is tracked in Dynamics 365.



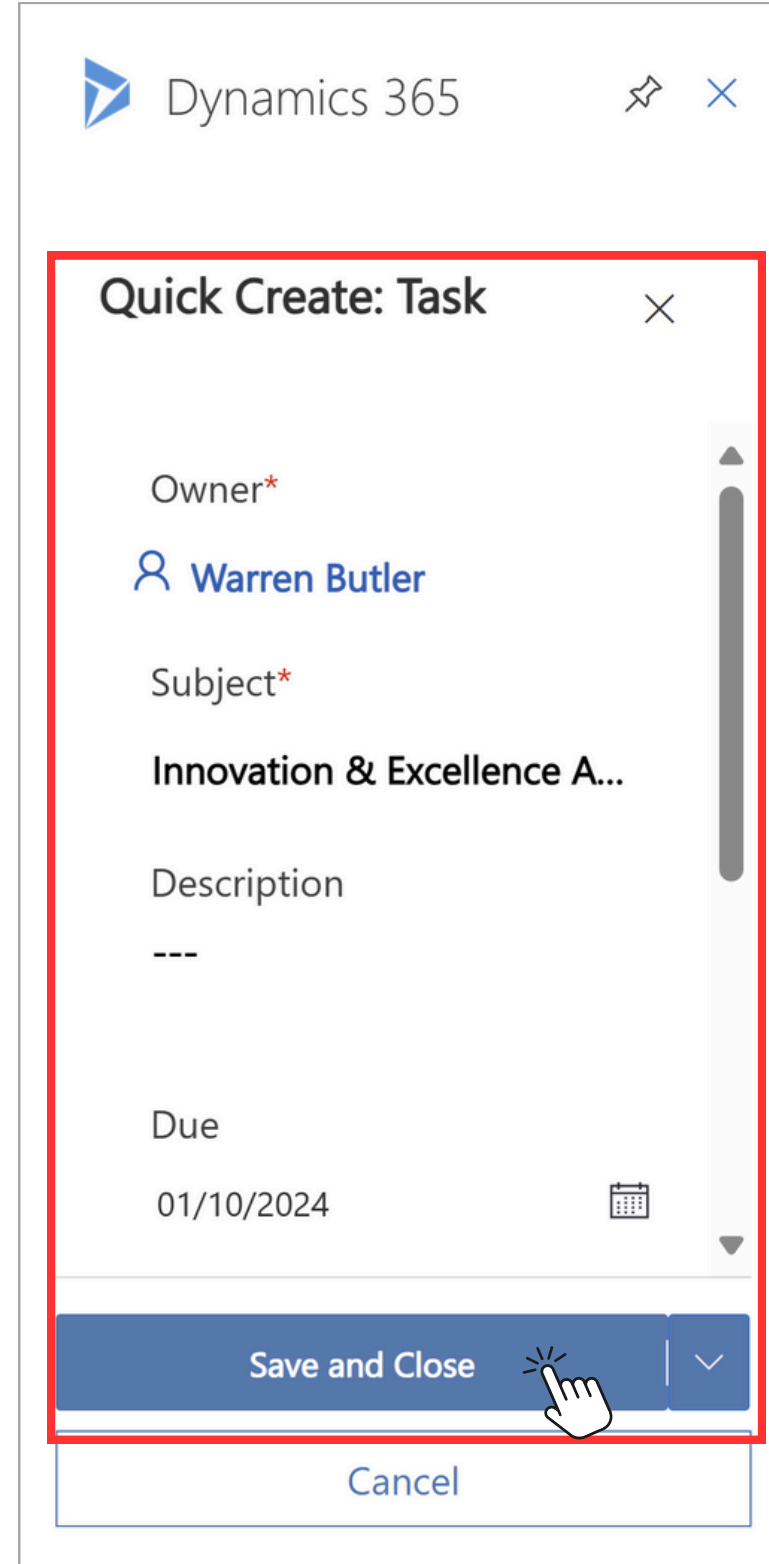
Select 'set regarding' to track the email to the matching contact or search to find another Dynamics 365 record.

Creating an activity from a tracked email

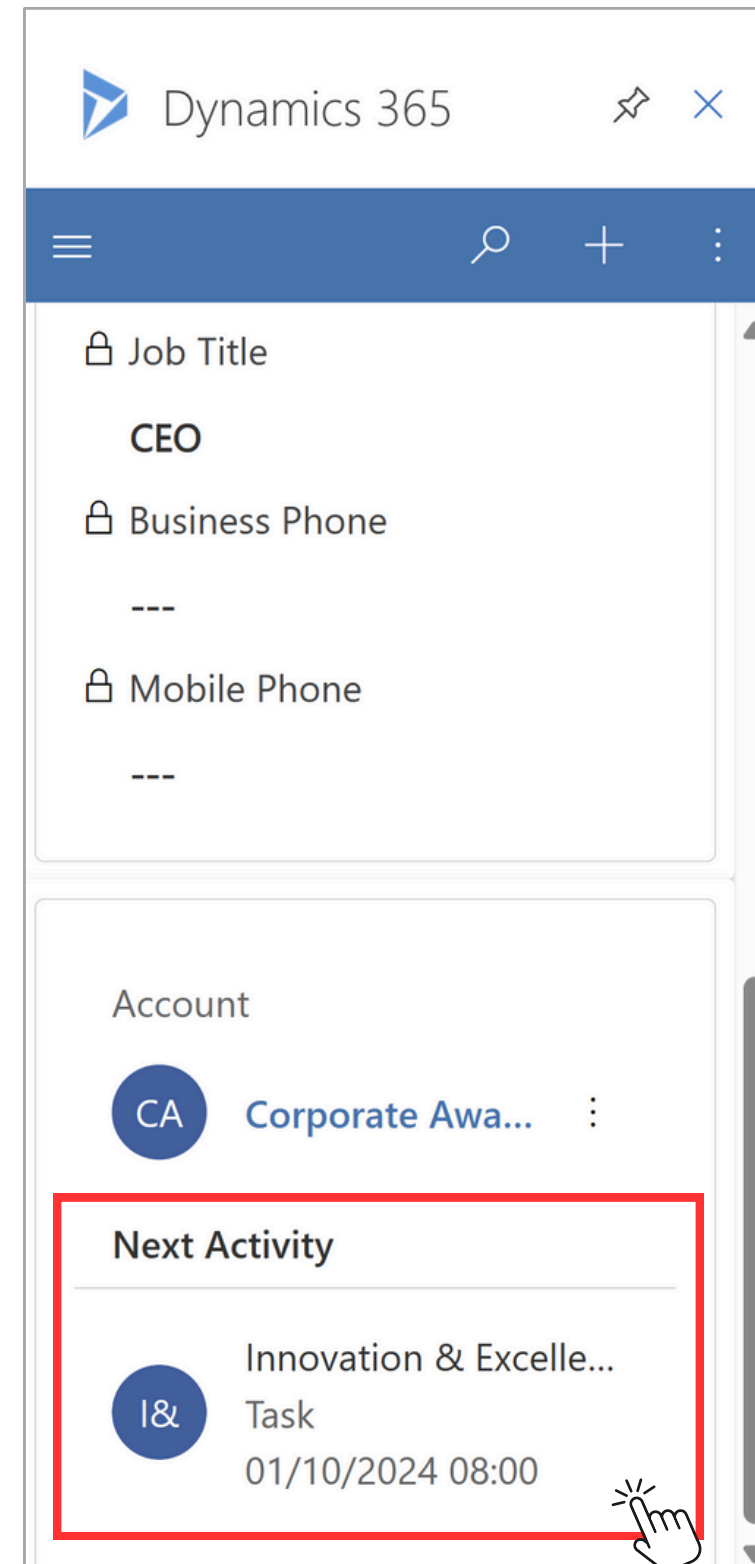
From a tracked email, add an activity to the related Dynamics record.



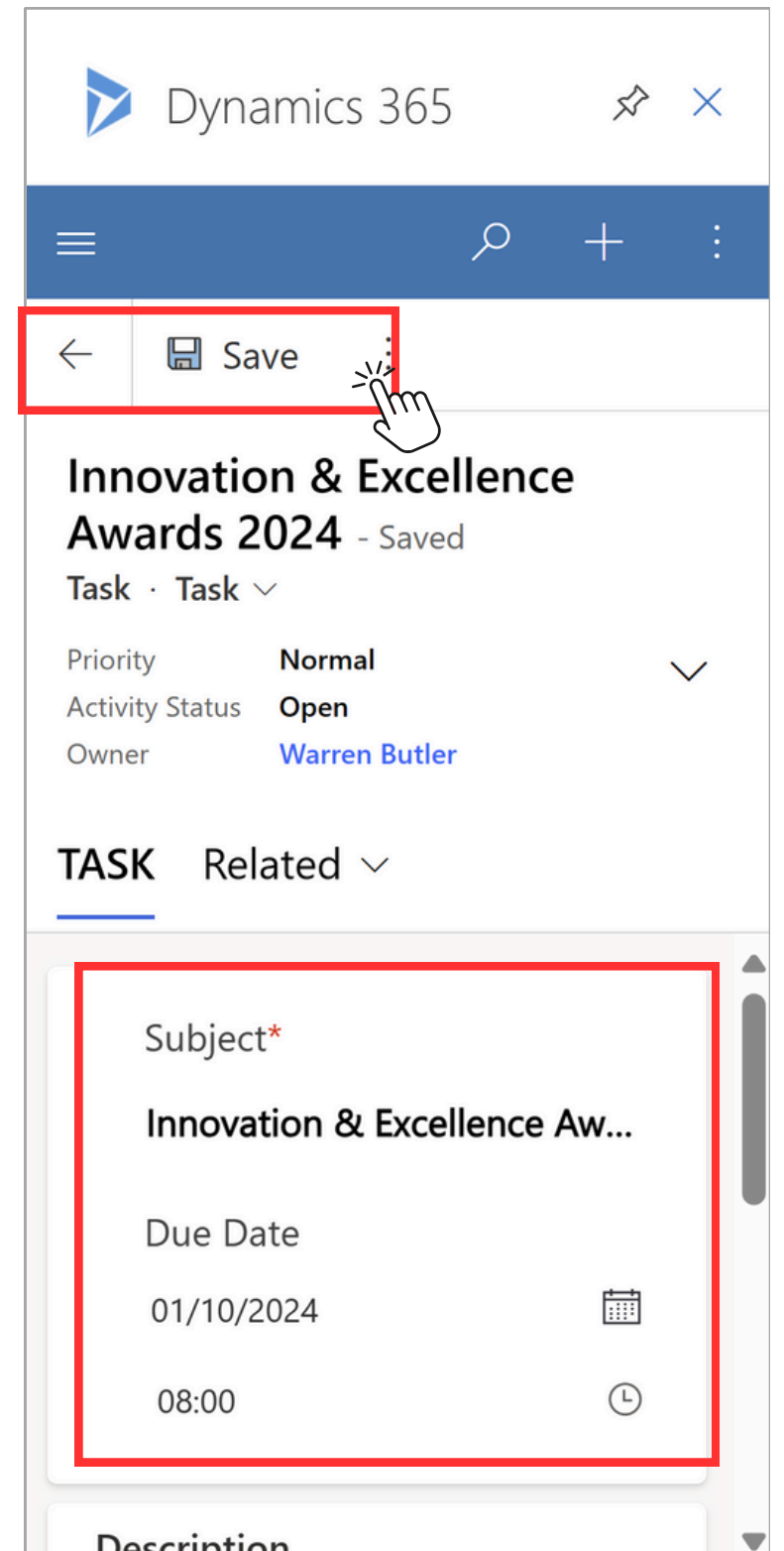
Complete the fields to save the activity record in Dynamics 365.



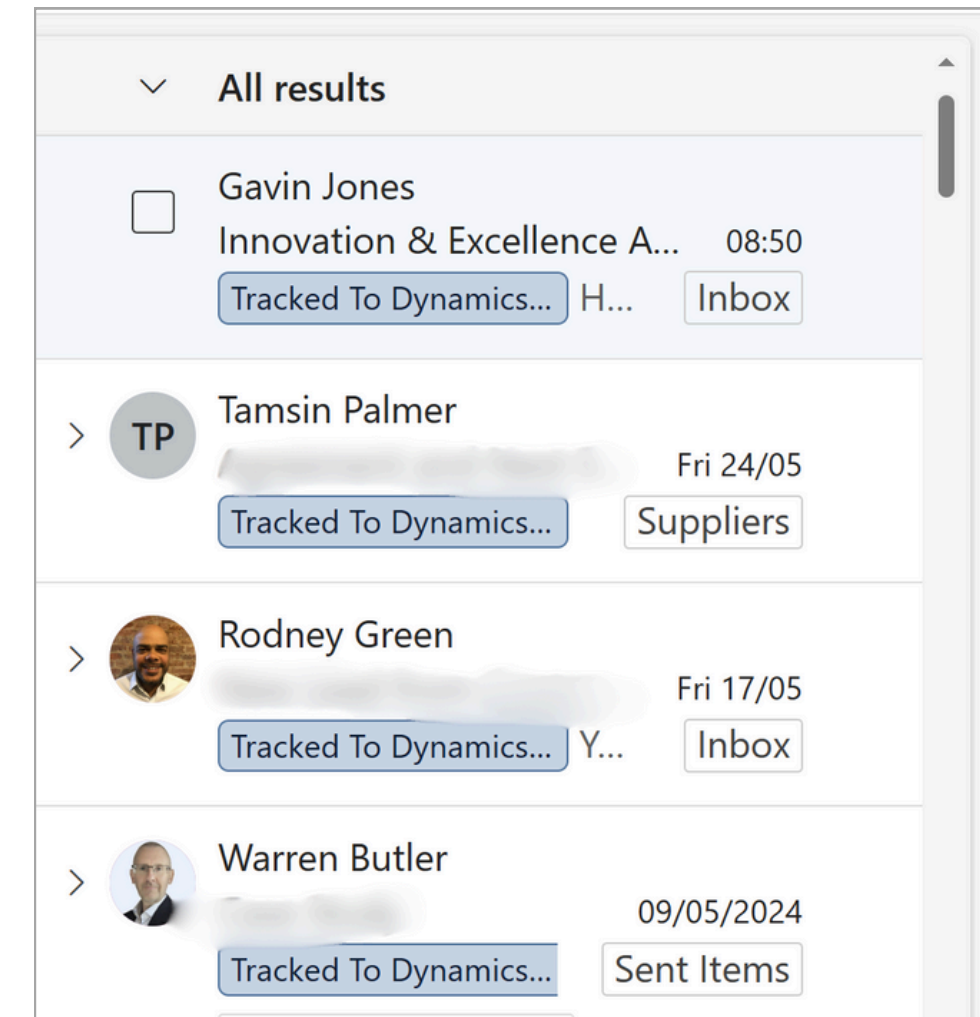
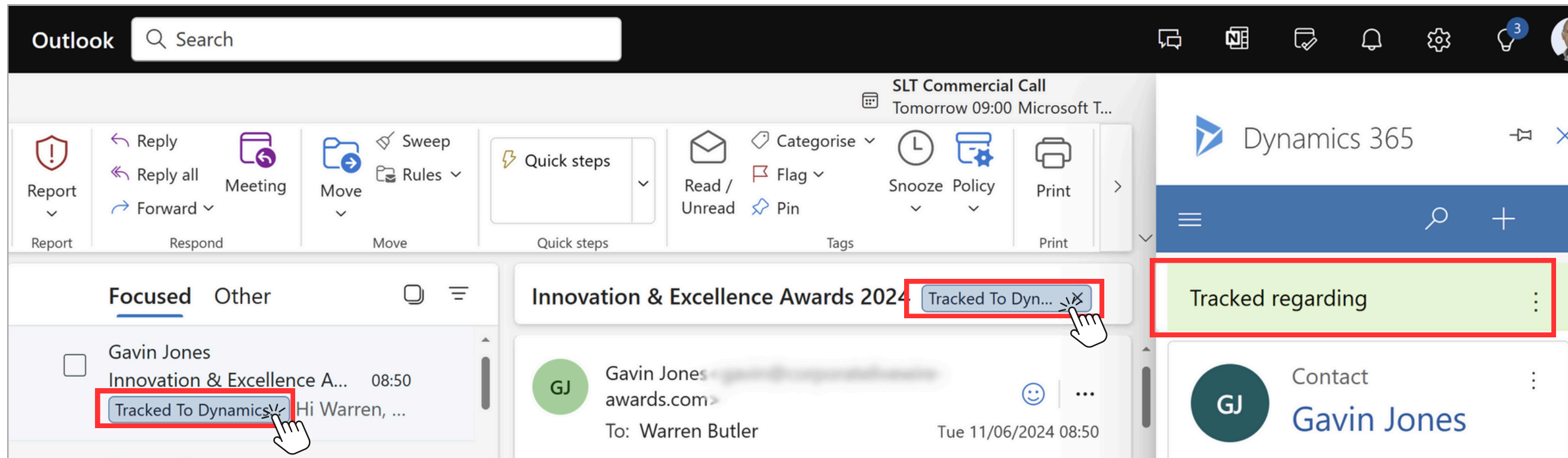
View related activities and other contextual records, such as leads or cases.



Click to open a related CRM record within Outlook to view and save changes.



Viewing Dynamics 365 tracked emails

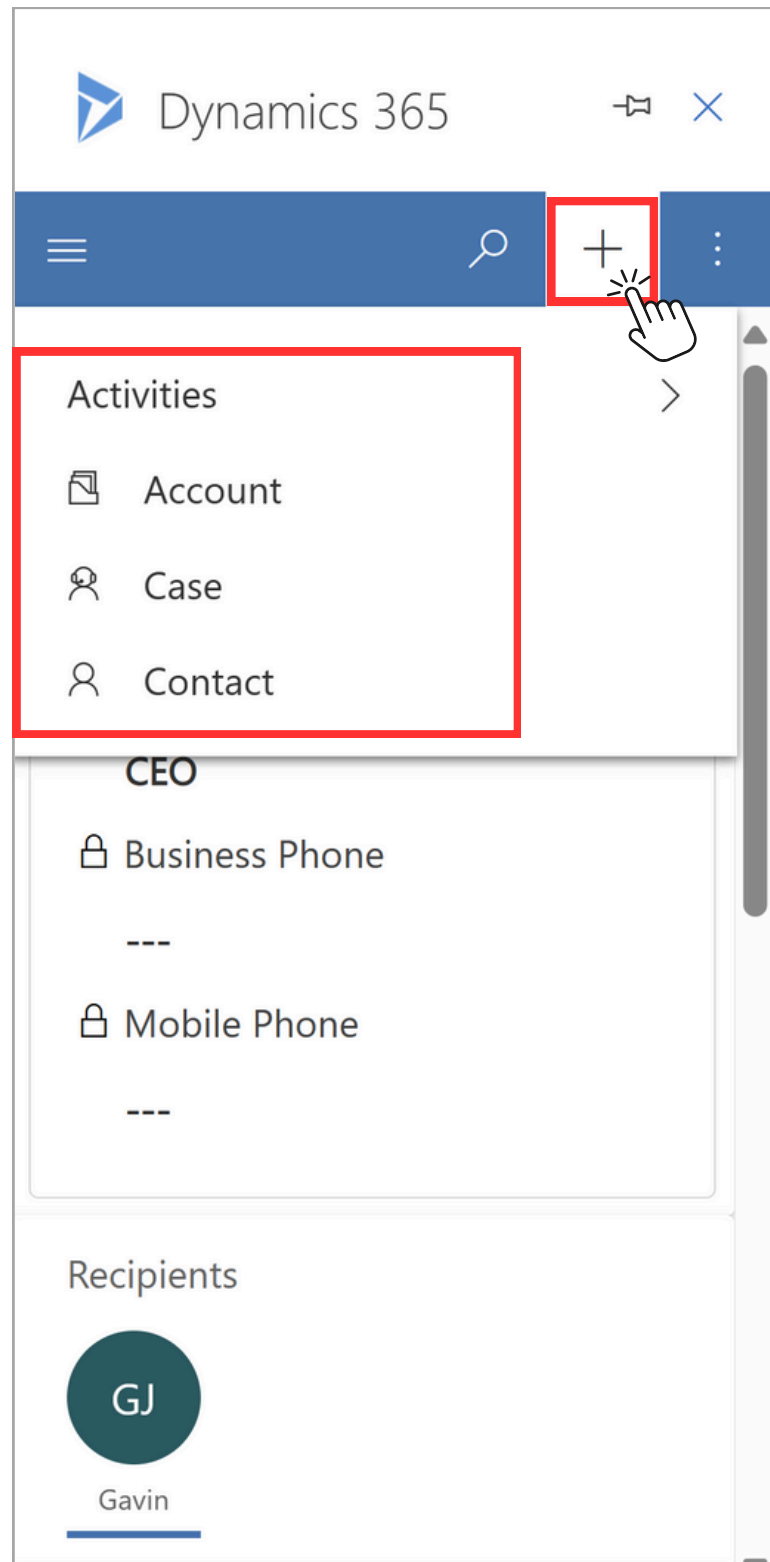


Quickly see if an Outlook email has been saved to Dynamics 365.

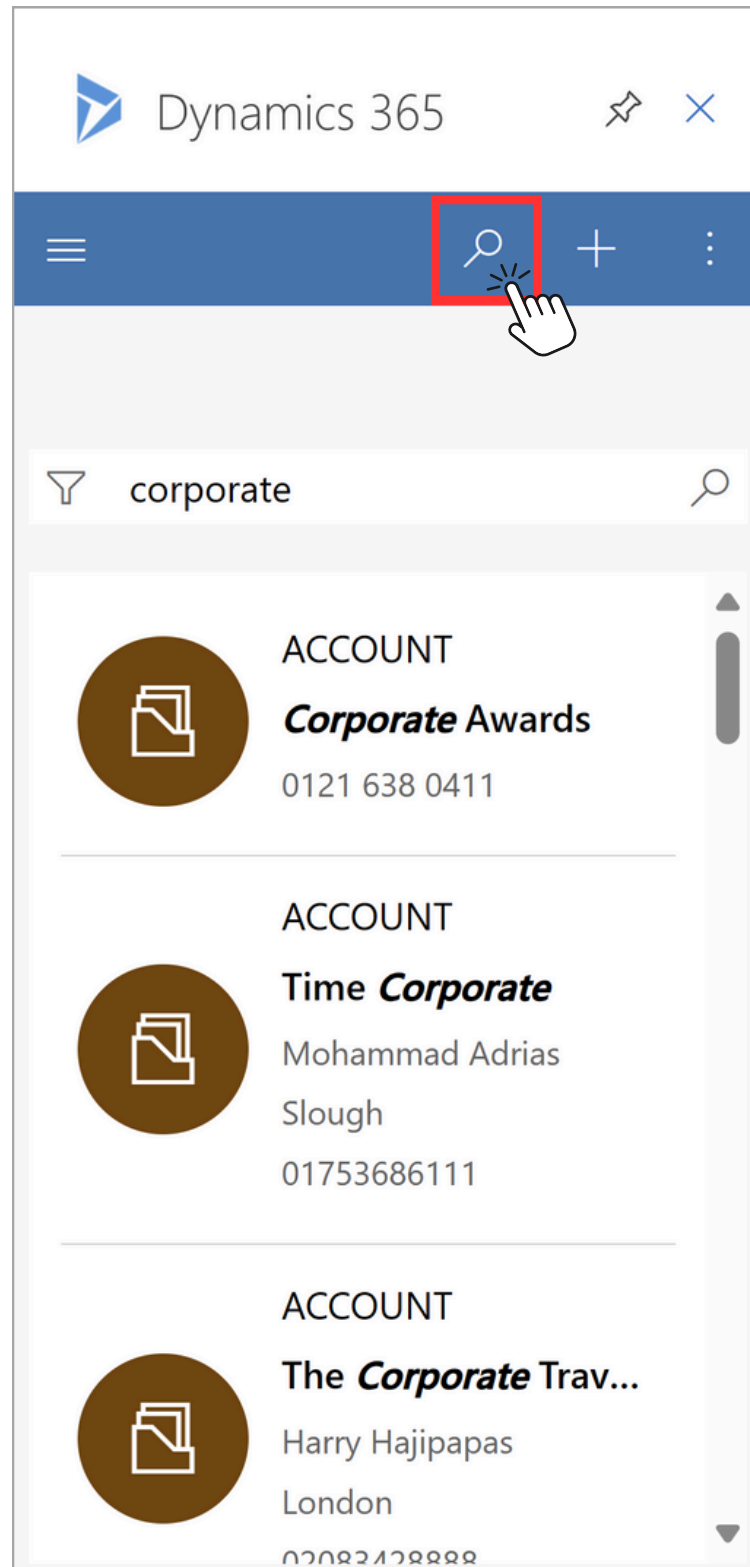
To filter your email list to only show emails tracked in CRM, click the 'Tracked to Dynamics' tag.

Using the Dynamics 365 App for Outlook navigation bar

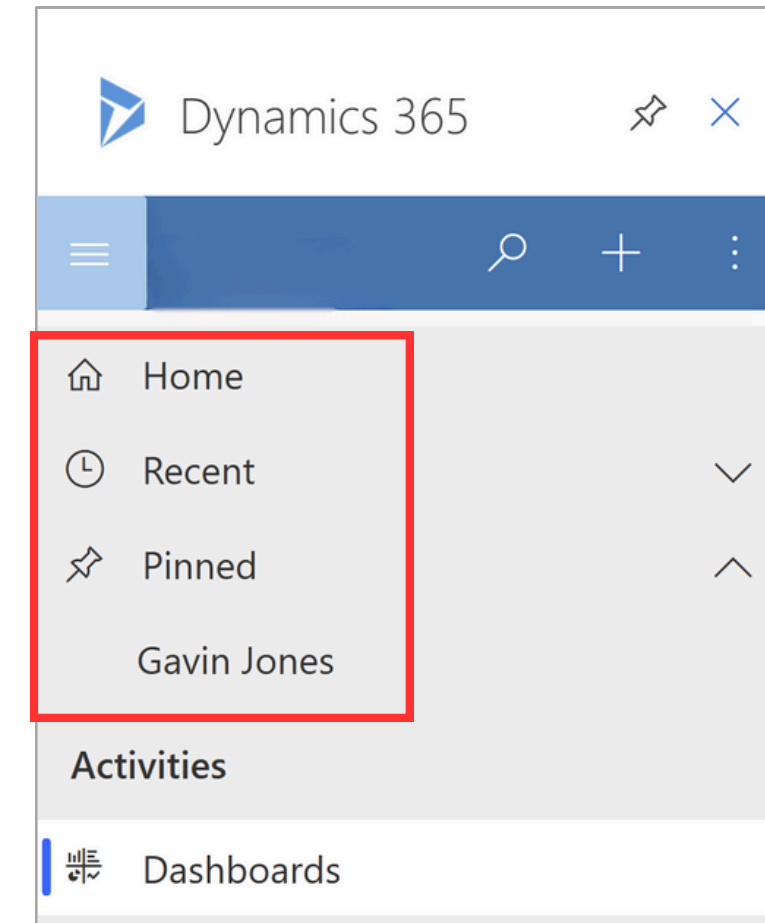
New Dynamics records can also be created from the nav bar. This can be configured to support any type of record.



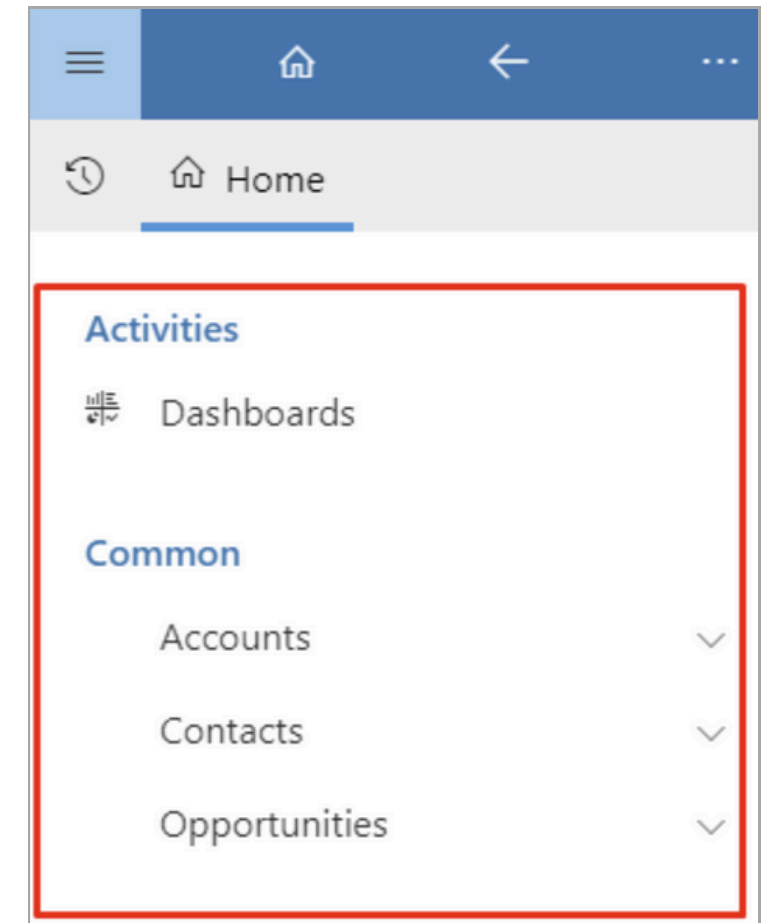
Search across multiple Dynamics 365 record types and open these CRM records directly in Outlook.



Quickly access Dynamics 365 records from the site map.

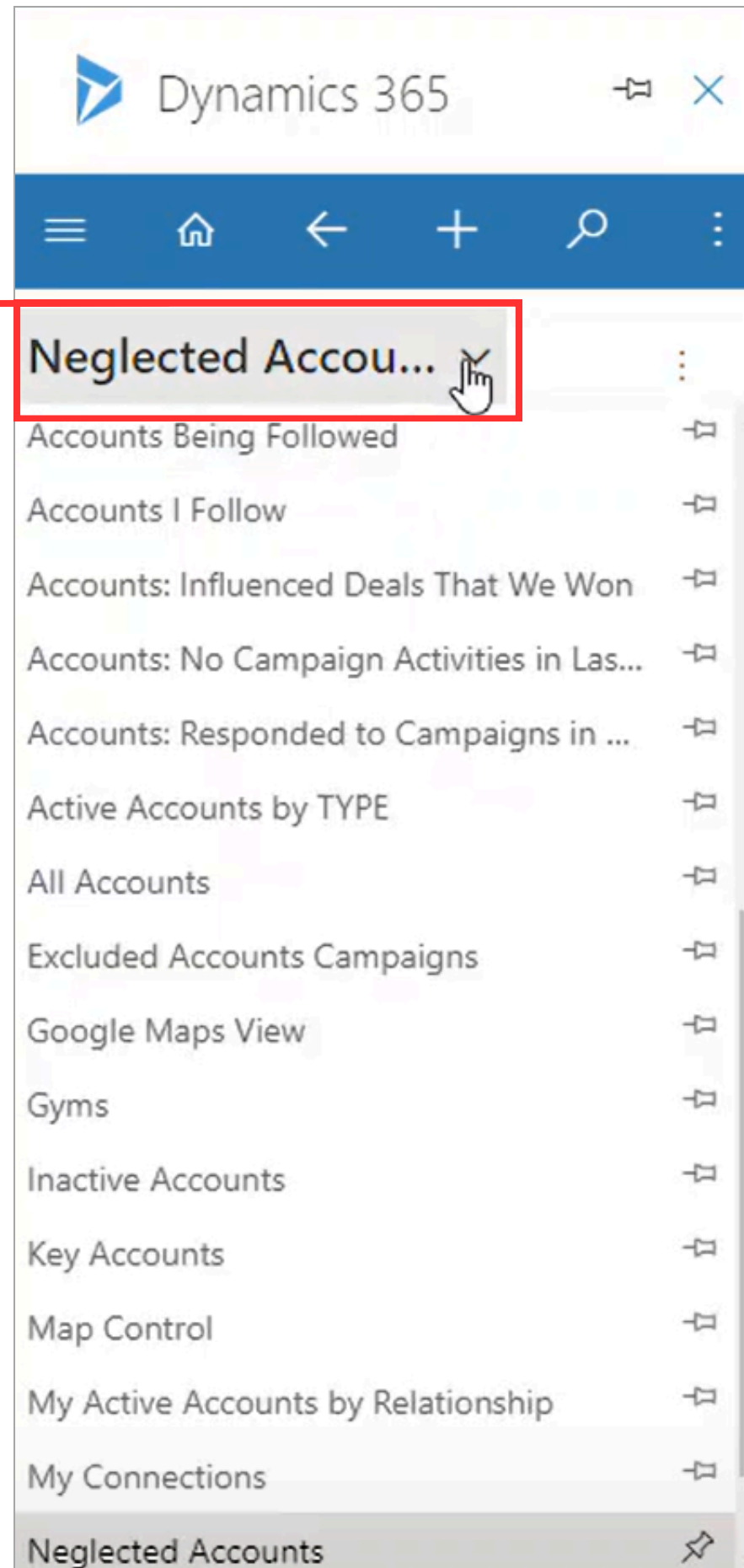


Customise the site map to enable access to more Dynamics records, such as opportunities and leads.



Using the Dynamics 365 App for Outlook navigation bar

From the site map, access your Dynamics 365 saved views for any record type to find the relevant records quickly.



Sync Outlook Events to Dynamics 365

The screenshot shows the Outlook interface for creating a meeting. The main window is titled "Account Review" and is set to be sent from "Calendar (Warren.Butler@serversys.com)". The meeting is for "Josh White" and is marked as "Optional". Three suggested times are shown: Tue 11/06 16:00 - 16:30, Tue 11/06 16:30 - 17:00, and Wed 12/06 08:00 - 08:30, all marked as "Available: Everyone". The meeting details include a date of 11/06/2024, a time of 15:30, an "All day" toggle, and "Time zones" options. There are also options for "Don't repeat" and "In-person event". A "Teams meeting" toggle is visible at the bottom. On the right, the Dynamics 365 sidebar is open, showing a "Tracked regarding" section and a contact card for "Josh White" with fields for Job Title, Business Phone, and Mobile Phone.

Link Outlook meeting invites and other events to related contacts, accounts, leads and other record types in Dynamics 365



Want to know more?

Speak to ServerSys to learn more about how you can use the Dynamics 365 App for Outlook.

Contact us today on
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