



# Dynamics 365 for Outlook (also known as Outlook COM add-in) Deprecation Playbook

Transition from the legacy Outlook COM add-in client to the modern Dynamics 365 App for Outlook

2020



# Purpose and scope

## THE SITUATION





Microsoft is deprecating the Dynamics 365 for Outlook also known as Outlook COM add-in.

This is a great opportunity for customers to transition to the modern Dynamics 365 App for Outlook which allows more use-cases, anywhere your users work today.

## PURPOSE

This playbook is intended to help customers plan and execute transitions from the legacy Dynamics 365 for Outlook COM add-in to the modern Dynamics 365 App for Outlook.

### Audiences:

-  Customers
-  Partners and System Integrators
-  ISV
-  Microsoft FastTrack, Customer Success, and Consulting teams

### In summary, this guide will help you:

- ✓ Understand why the legacy Outlook COM add-in is deprecated
- ✓ Understand the transitioning process
- ✓ Develop a strategy for discussions and the transition
- ✓ Ensure a smooth transition
- ✓ Manage user inquiries and potential objections effectively
- ✓ Find the resources that will support the process

## BASED ON EXPERIENCES TO DATE, A SOLID TRANSITION LARGELY DEPENDS ON 7 FACTORS:

### SUCCESS

- Understanding Dynamics 365 App for Outlook
- Seeing the value of Dynamics 365 App for Outlook
- Assessing the scope of transitioning to Dynamics 365 App for Outlook
- Managing the process of transitioning to Dynamics 365 App for Outlook
- Taking advantage of key benefits of Dynamics 365 App for Outlook
- Accommodating changes and gaps in Dynamics 365 App for Outlook
- Timely response to user inquiries and objections

## INSIDE THIS PLAYBOOK:

### APP FOR OUTLOOK

Understanding the value proposition of Dynamics 365 App for Outlook

### COMPARISON

Understanding the history of both integrations and key differences

### TRANSITION

Transitioning to the modern App for Outlook

### FAQ

Frequently Asked Questions

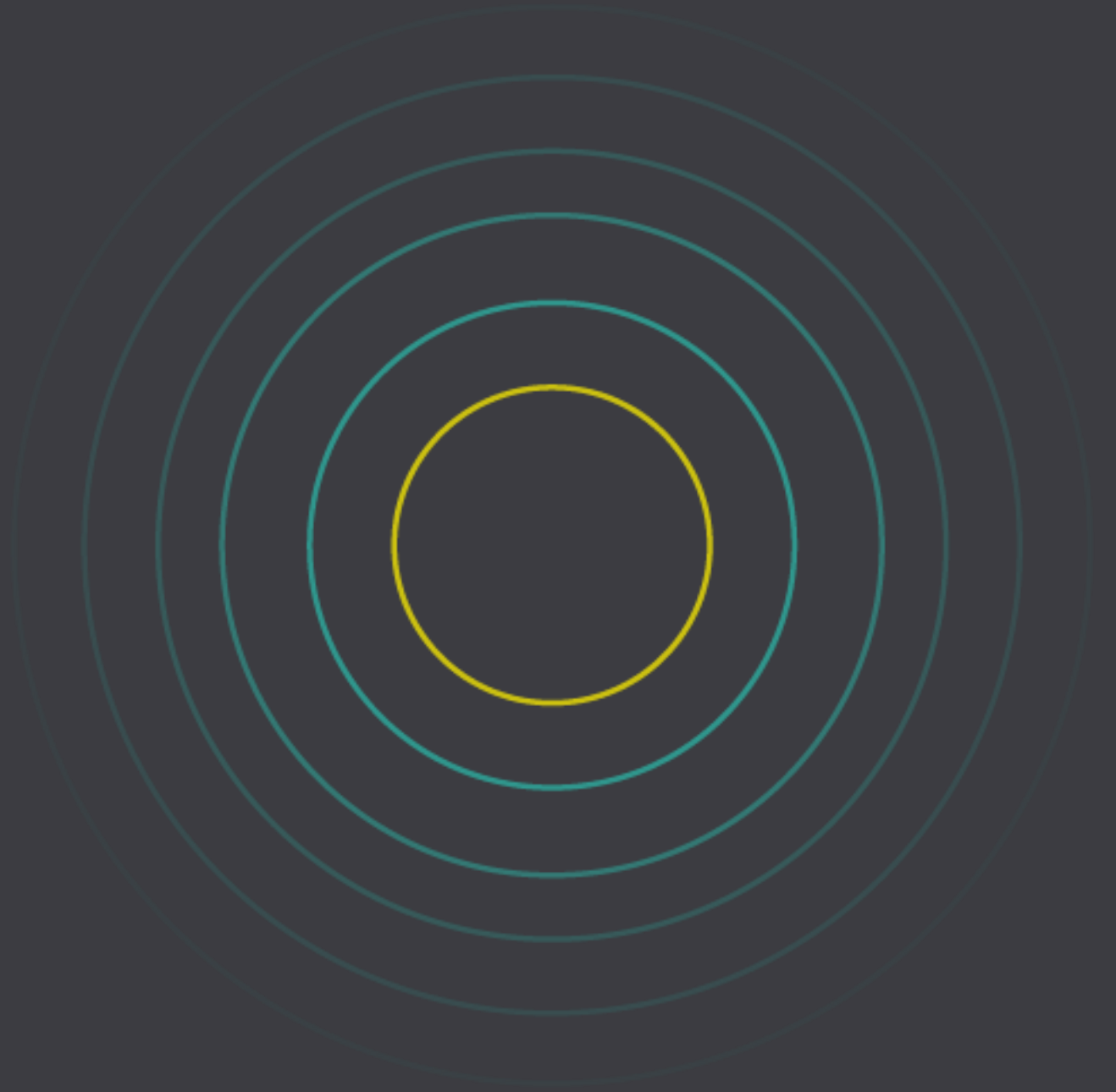
# Introduction

One of the key strengths of Dynamics 365 has always been its **tight integration with the Office applications**, especially with Outlook, where users can track customer interactions against records in Dynamics 365.

The **Outlook COM add-in** is relying on deprecated technology and has been known to affect the client machine's performance while being complex for customers to deploy and update.

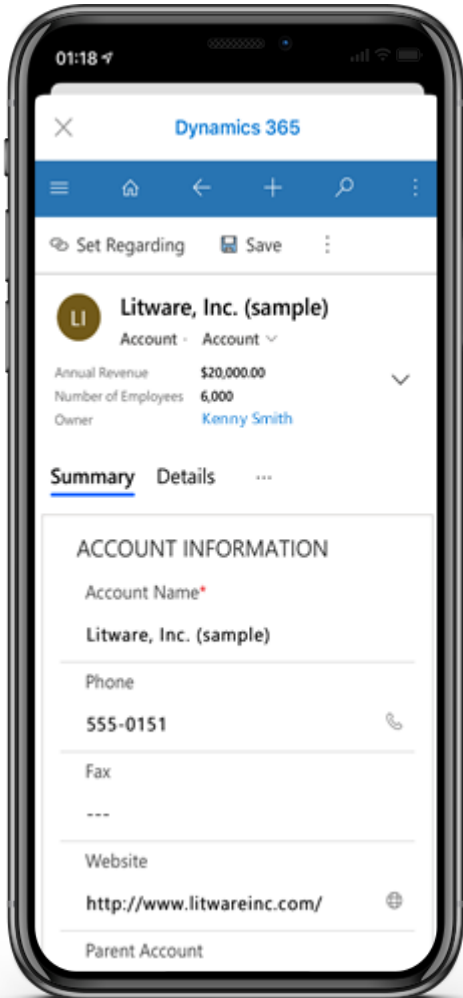
Introduced in 2015 and continuously updated, the modern **Dynamics 365 App for Outlook** is functionally on par with the Outlook COM add-in while bringing additional capabilities, such as seamless deployment, availability across desktop, web, and mobile, and runs on Unified Interface.

# Dynamics 365 App for Outlook

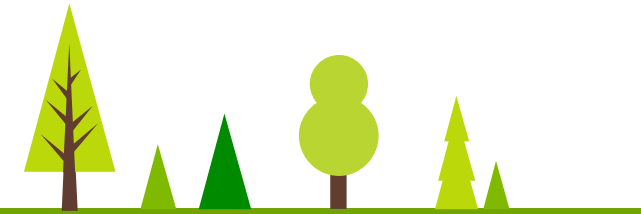


# Overview of the Dynamics 365 App for Outlook

With Dynamics 365 App for Outlook, you can:



- ✓ View information about Dynamics 365 app\* contacts and leads while you're working in Outlook. You can view this info in the context of an email message, meeting, or appointment. For example, view phone numbers, company name, last and next activities, and recent records from Dynamics 365 app.
- ✓ Track email messages, meetings, and appointments to a Dynamics 365 app record with a single click. For example, link an email message to a specific account, opportunity, or case. Dynamics 365 App for Outlook also supports custom entities.
- ✓ Open Dynamics 365 app records directly to find or enter more detailed information.
- ✓ Add a phone call, task, or appointment activity to Dynamics 365 app quickly.
- ✓ Create a new Dynamics 365 app record for any entity.
- ✓ Add email templates, knowledge articles, and sales literature when you create an email message or set up a meeting.
- ✓ Track Outlook address book contacts in Dynamics 365 app.
- ✓ Use the app without login prompts
- ✓ Deploy without client installation
- ✓ Deploy without client configuration



\* Dynamics 365 app represents Dynamics 365 Sales, Dynamics 365 Customer Service, Dynamics 365 Marketing, Dynamics 365 Field Service, or Dynamics 365 Project Service Automation.

# Before Dynamics 365 App for Outlook



Scrambling to find context and find relevance – searching manually across systems...

A screenshot of the Microsoft Outlook interface. The top ribbon shows the 'Home' tab with various email actions like 'New Email', 'Delete', 'Reply', and 'Forward'. The 'Dynamics 365' tab is also visible, with options like 'Quick Steps', 'Move', 'Tags', 'Groups', 'Untrack', 'Set Regarding', 'Convert To', 'Add Connection', and 'View in Dynamics 365'. The main area displays an email from 'Teddy Cornejo' with the subject 'Update on our issue' and the body text 'Hello Kenny, Could you let me know if we are ready?'. Below the email, there is a red box with three white question marks '???' overlaid on the interface. The bottom status bar shows 'Items: 3', 'All folders are up to date.', 'Connected to: Microsoft Exchange', and a zoom level of '100%'.

# After Dynamics 365 App for Outlook



Improve efficiency when working in Outlook

Automatic Sender recognition drives better context awareness allowing your users to quickly get context of the customer and navigate to their records from Dynamics 365 all without leaving the email or Outlook!



**Update on our issue**

Teddy Cornejo  
Wed 3/18/2020 12:38 AM  
Kenny Smith

Hello Kenny,

Could you let me know if we are ready?

Teddy

[Yes, we're ready.](#) [Yes, I will let you know.](#) [Yes, you are.](#)

Are the suggestions above helpful? [Yes](#) [No](#)

**Dynamics 365**

Not tracked

Set Regarding

Recipients

**Contact**  
**Teddy Cornejo**  
Group Purchaser  
555-1010  
Kenny Smith

**Account**  
Fabrikam

**Dynamics 365**

Set Regarding Save

**Teddy Cornejo**  
Contact · Contact  
Owner: Kenny Smith

**Summary**

**CONTACT INFORMATION**

First Name\*  
**Teddy**

Last Name\*  
**Cornejo**

Job Title  
**Group Purchaser**

Account Name  
**Fabrikam**

Email  
**teddy.cornejo@fabrikam...**

Business Phone



# Improve efficiency when working in Outlook

Quickly create new contacts, leads or accounts from unknown recipients

The App for Outlook allows to effortlessly capture of new Dynamics 365 contact, lead or account with prefilled information based on the recipient's data.

Your news and insights summary

Dynamics 365 AI for Market Insights Preview <MarketInsights@mic  
To: Kenny Smith  
Mon 12:04 PM

If there are problems with how this message is displayed, click here to view it in a web browser.

Microsoft | Dynamics 365 Market Insights Preview

### Recent developments in your business universe

**Fewer searches for Microsoft Dynamics 365 commonly include "finance"**  
Product insight • March 9  
"finance" appeared in 35% fewer searches with Microsoft Dynamics 365 this past week compared to the previous week.

**"finance"**  
35% fewer

Go to insight Share

Relevant articles for Microsoft Dynamics 365

**Three Challenges to Making Project for the Web Smarter**  
MPUG • Forum • 3/9/2020  
Project for the web is Microsoft's most recent cloud-based offering to help ...  
Project for the web data is stored in entities within Dynamics 365 Common

Dynamics 365

Not tracked

Set Regarding

Recipients

D3  
Dynamics

Unknown Recipient

ⓘ Create contact first to avoid duplicates

Dynamics 365 AI for Market Insig...  
MarketInsights@microsoft.com

Add as Contact  
Add as Lead  
Add as Account



# Improve efficiency when working in Outlook

Get full context and quickly create new Tasks and Activities without leaving an email

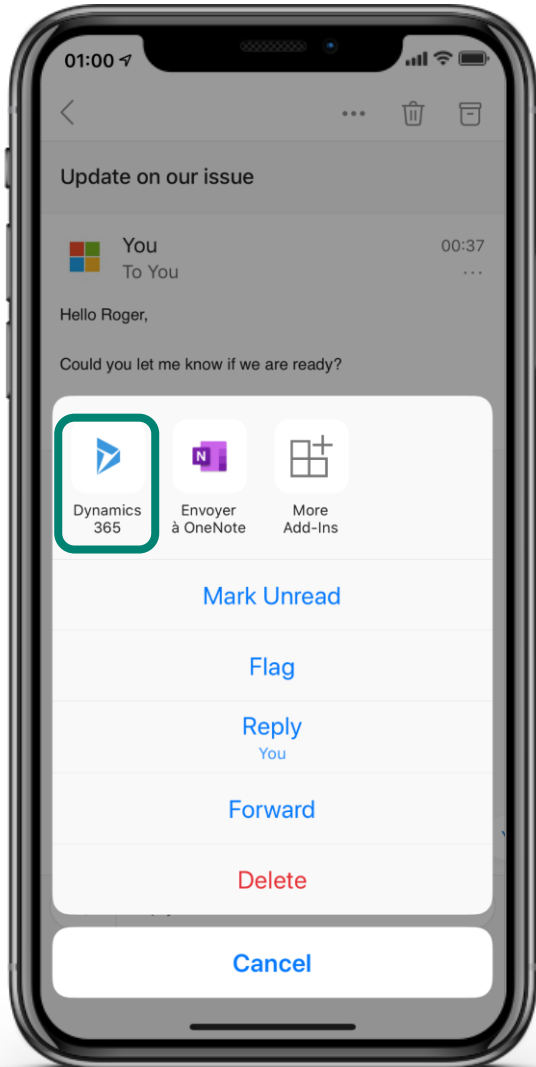


The screenshot displays the Outlook interface with a blue header bar. The left sidebar shows the 'Inbox' folder selected. The main pane shows an email from 'Teddy Cornejo' with the subject 'Update on our issue' and a 'Tracked To Dynamics 365' tag. The email content includes a greeting and a question: 'Could you let me know if we are ready?'. Below the text are three buttons: 'Yes, we're ready.', 'Yes, I will let you know.', and 'Yes, you are.'. A feedback prompt asks 'Are the suggestions above helpful?' with 'Yes' and 'No' options. On the right, a Dynamics 365 context menu is open, showing options to 'Add Task', 'Add Appointment', and 'Add Phone Call'. The 'Add Task' option is highlighted with a green border.

# Work on the go in Microsoft Outlook Mobile App



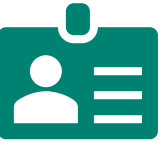
Now on the go!



Use the functionality of **Dynamics 365 App for Outlook** when working on your Mobile device to track emails and to access contextual information

# Track contacts with Dynamics 365 App for Outlook

Link contacts from your Outlook Address Book to Dynamics 365 accounts



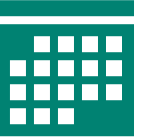
The screenshot displays the Dynamics 365 App for Outlook interface. The main pane shows a list of Outlook contacts under the heading 'Outlook Contacts'. The contact 'Carey Lindstrom' is highlighted with a green box. The 'Link' pane on the right shows 'My Active Accounts' with a list of Dynamics 365 accounts.

Tracked	Full Name	Title	Company	Business Phone	Email
<input type="checkbox"/>	Carey Lindstrom				
<input checked="" type="checkbox"/>	Alberto Gass				
<input checked="" type="checkbox"/>	Jim Glynn (sample)	Owner	<a href="#">Coho Winery (sample)</a>	555-0109	<a href="mailto:someone_j@example.com">someone_j@example.com</a>
<input checked="" type="checkbox"/>	Maria Campbell (sample)	Purchasing Manager	<a href="#">Fabrikam, Inc. (sample)</a>	555-0103	<a href="mailto:someone_d@example.com">someone_d@example.com</a>
<input type="checkbox"/>	Microsoft (do not reply)				<a href="mailto:maccount@microsoft.com">maccount@microsoft.com</a>
<input checked="" type="checkbox"/>	MyAnalytics				<a href="mailto:no-reply@microsoft.com">no-reply@microsoft.com</a>
<input checked="" type="checkbox"/>	Nancy Anderson (sample)	Purchasing Assistant	<a href="#">Adventure Works (sample)</a>	555-0102	<a href="mailto:someone_c@example.com">someone_c@example.com</a>
<input checked="" type="checkbox"/>	Patrick Sands (sample)	Owner	<a href="#">Alpine Ski House (sample)</a>	555-0110	<a href="mailto:someone_k@example.com">someone_k@example.com</a>
<input checked="" type="checkbox"/>	Patrick Sands (sample)	Marketing Specialist	<a href="#">A. Datum Corporation (sample)</a>	555-0200	<a href="mailto:MarketInsights@microsoft.com">MarketInsights@microsoft.com</a>
<input checked="" type="checkbox"/>	Paul Cannon (sample)	Purchasing Assistant	<a href="#">Alpine Ski House (sample)</a>	555-0107	<a href="mailto:someone_h@example.com">someone_h@example.com</a>

Account Name	Main Phone	Address 1: City
Litware, Inc. (sample)	555-0151	Dallas
Fourth Coffee (sample)	555-0150	Renton
Fabrikam, Inc. (sample)	555-0153	Lynnwood
Contoso Pharmaceuticals (sample)	555-0156	Redmond
Coho Winery (sample)	555-0159	Phoenix
City Power & Light (sample)	555-0155	Redmond
Blue Yonder Airlines (sample)	555-0154	Los Angeles
Alpine Ski House (sample)	555-0157	Missoula
Adventure Works (sample)	555-0152	Santa Cruz
A. Datum Corporation (sample)	555-0158	Redmond

# Track appointments with Dynamics 365 App for Outlook



Get contextual information on related record and attendees

The screenshot displays the Outlook interface with the Dynamics 365 app integrated into the meeting appointment window. The main window shows a meeting titled "Customer Visit" on Thursday, 3/12/2020, from 2:00 PM to 4:00 PM. The Dynamics 365 app window is open, showing the following information:

- Tracked regarding:** Account A. Datum Corporati...
- Attendees:** Rene Valdes (sample) (someone9@example.com), 555-0158, and Patrick (PS).

The background shows a calendar view with a blue bar for the "Customer Visit" appointment on Thursday, 3/12/2020.

# New! Delegate Access in App for Outlook



Set up delegate access in Outlook to **give someone permission to act on your behalf.**

*For example, you likely already set up an assistant to create and respond to email or meeting requests for you. This feature enables that same assistant to then also track these items into Common Data Service using Dynamics 365 App for Outlook.*

Manager

**Delegate:** Assistant

*Another example:*

Employee A (On Holiday)

**Delegate:** Employee B (Helping out)

The screenshot displays the Dynamics 365 App for Outlook interface. On the left, an email thread titled "Update on our issue" is shown. The sender is Teddy Cornejo, dated Wed 3/18/2020 12:38 AM, and the recipient is Kenny Smith. The email content includes a greeting "Hello Kenny," a question "Could you let me know if we are ready?", and a response "Teddy". Below the text are three buttons: "Yes, we're ready.", "Yes, I will let you know.", and "Yes, you are.". At the bottom of the email, there is a feedback prompt: "Are the suggestions above helpful? Yes No".

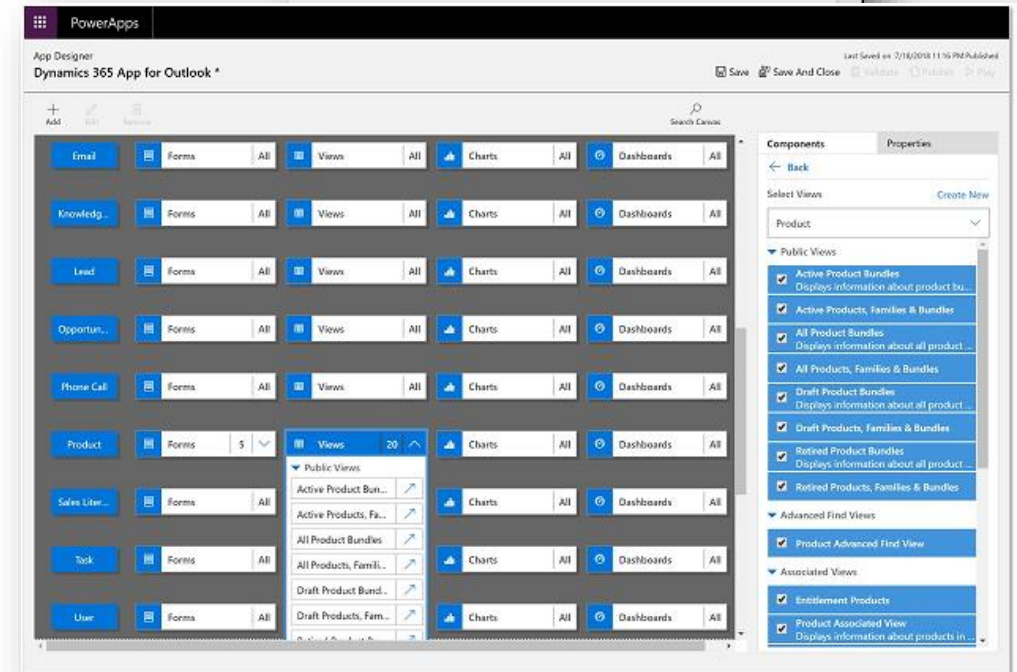
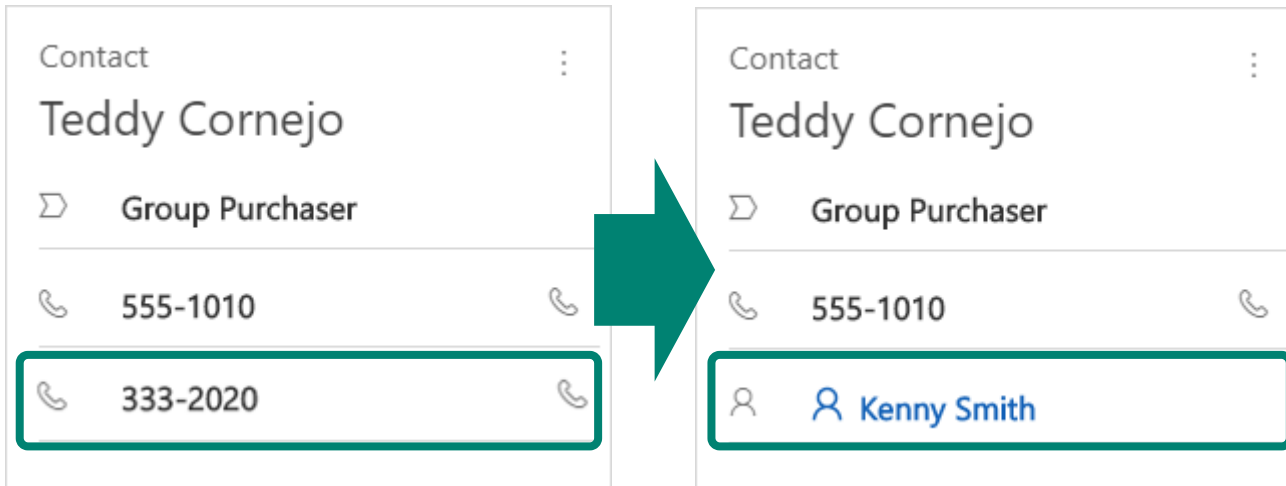
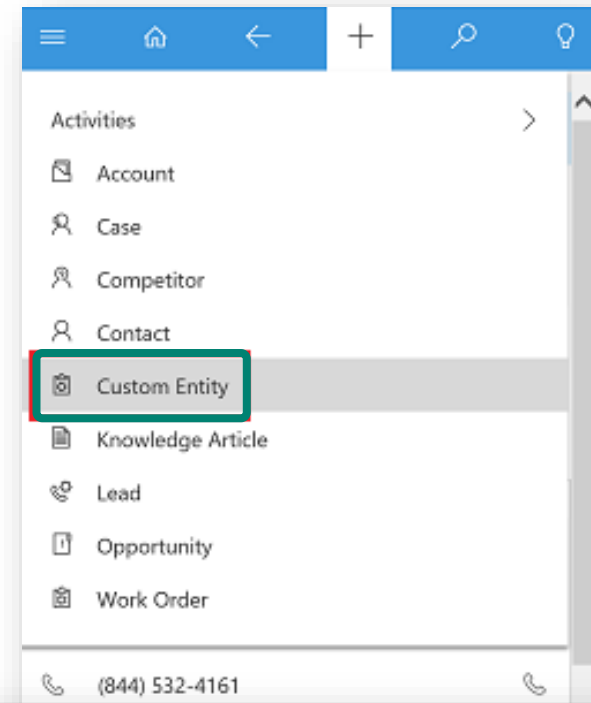
On the right, the Dynamics 365 app sidebar is visible. It shows the "Not tracked" status, "Set Regarding" options, and a "Recipients" section with a profile card for "Teddy" (Teddy Cornejo). Below this, the "Contact" section shows "Teddy Cornejo" with the role "Group Purchaser" and phone number "555-1010". A link to "Kenny Smith" is also present. At the bottom, the "Account" section shows the user "LI Fabrikam".

# Customize Dynamics 365 App for Outlook



**Dynamics 365 App for Outlook** is **customizable**, so that presented information is even more relevant to your users.

- ✓ Customize the **track regarding card**
- ✓ Customize which **entities appear in Quick create**
- ✓ Customize the **Regarding lookup** to add or remove entities
- ✓ **Expand the fields search** in Regarding lookup
- ✓ Ensure emails and appointments are tracked with a **mandatory Regarding record** in App for Outlook
- ✓ **Filter entities and views** that appear in App for Outlook



# BONUS: Tracking emails to Dynamics 365 using Categories



“Tracked to Dynamics 365” Category is easy and helps visualize records already tracked!

- ✓ Email
- ✓ Appointment
- ✓ Task

The screenshot displays the Outlook interface with a context menu open over an email. The 'Categorize' option is selected, showing a list of categories. The 'Tracked To Dynamics 365' category is highlighted with a green box. The Dynamics 365 sidebar on the right shows a record for 'Item defecti...' with a 'Tracked regarding' label also highlighted in green. The email content shows a conversation between Teddy Cornejo and Kenny Smith.

<https://docs.microsoft.com/power-platform/admin/use-outlook-category-track-appointments-emails>

# BONUS: Tracking emails to Dynamics 365 using Tracked Folders



Drag and drop Outlook items to synchronized folders so that they are tracked and associated with the relevant records in Dynamics 365:

- ✓ Email
- ✓ Appointment
- ✓ Task

## Folder-Level Tracking

Set rules for [redacted] onmicrosoft.com to track email messages in Microsoft Dynamics 365 that are from specified Exchange folders.

Exchange Folder	Regarding Record in Dynamics 365
Alpine Ski House (sample)	Alpine Ski House (sample)

Outlook interface showing a tracked folder 'Alpine Ski House (...)' and an email from MyAnalytics. A green arrow points from the folder to the email, and a green box highlights the email.

Dynamics 365 account page for 'Alpine Ski House (sample)'. The timeline shows an email from MyAnalytics tracked to the account. A green box highlights the email record.



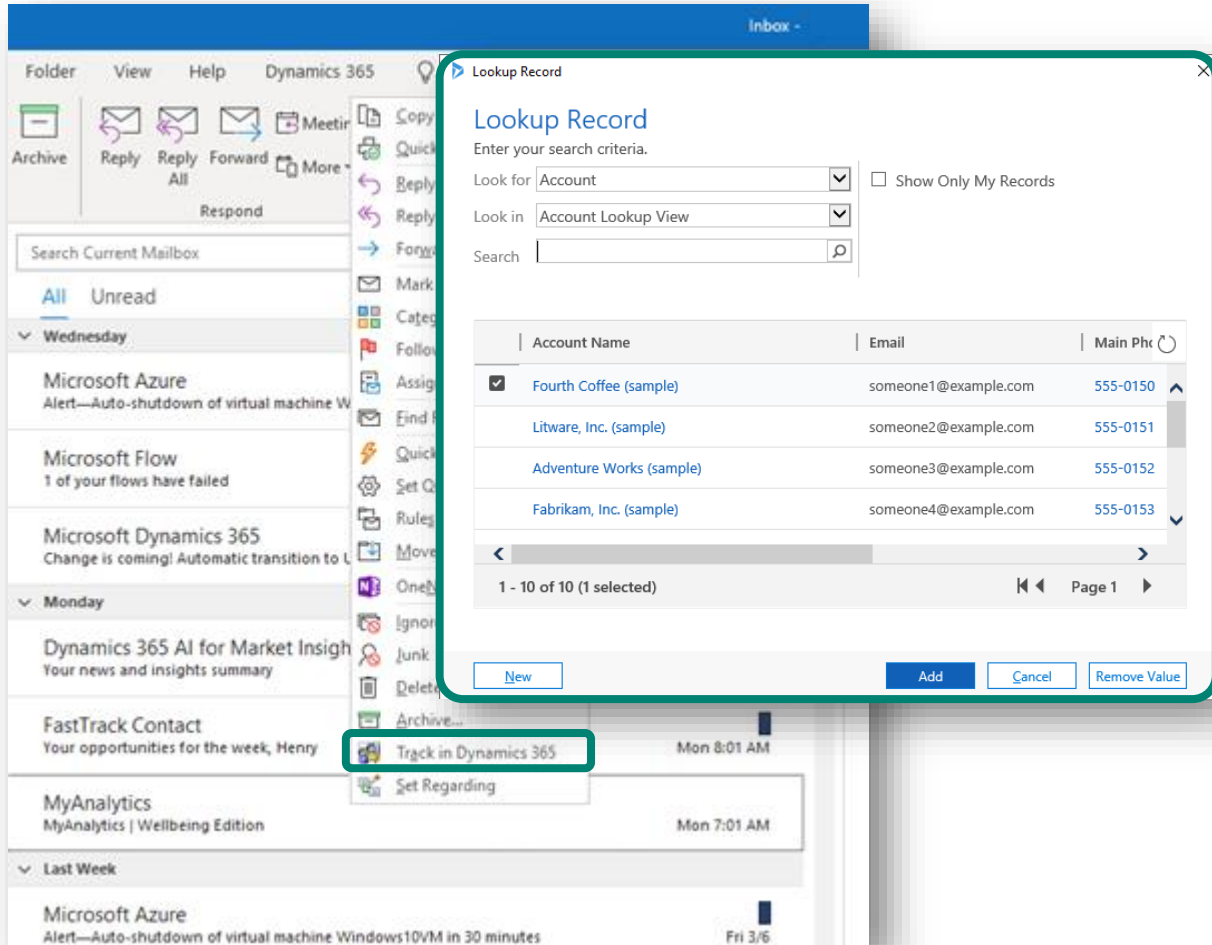
# Comparison between the Outlook COM add-in and Dynamics 365 App for Outlook



# Compares Experiences: tracking items

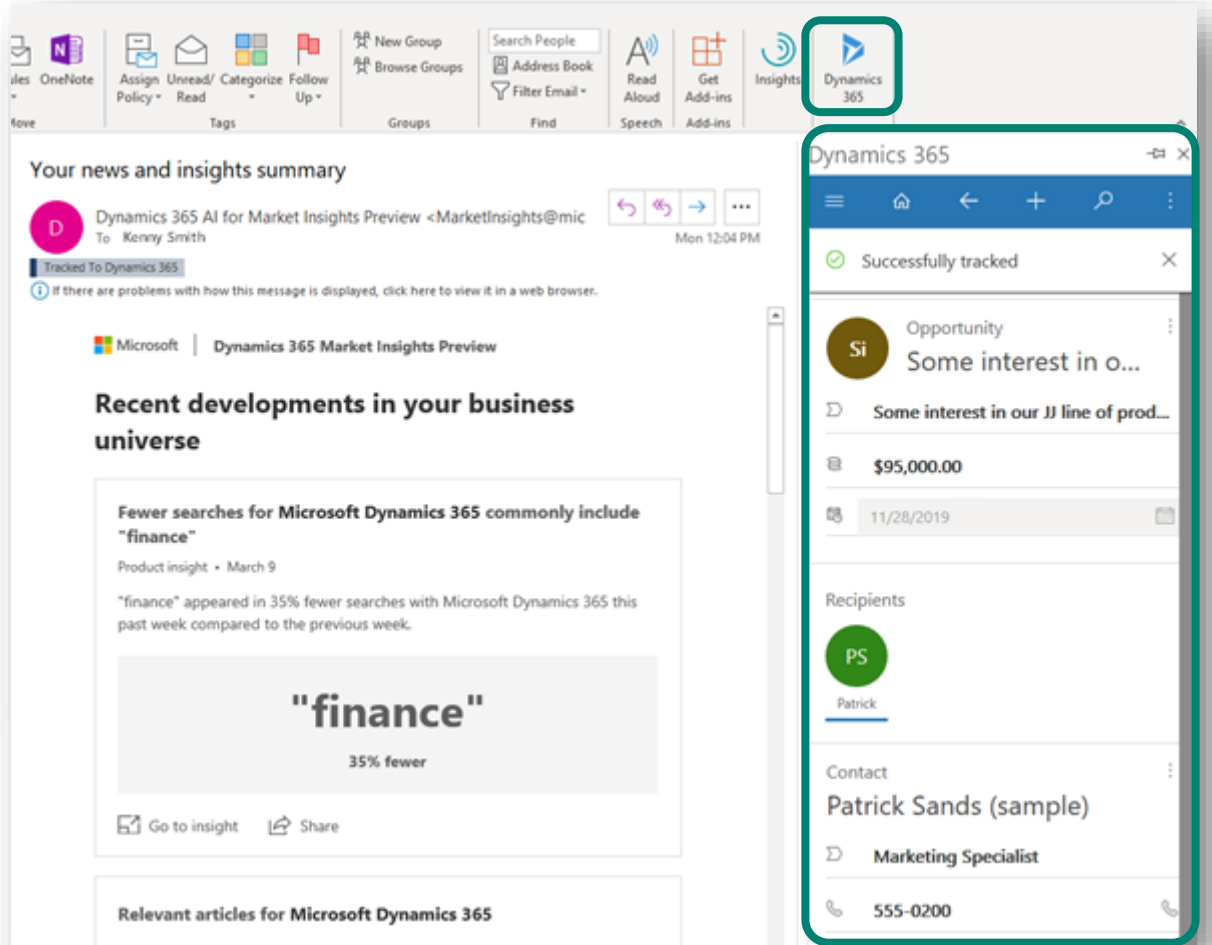
## Outlook COM add-in Tracking Email

Heavy but limited integration

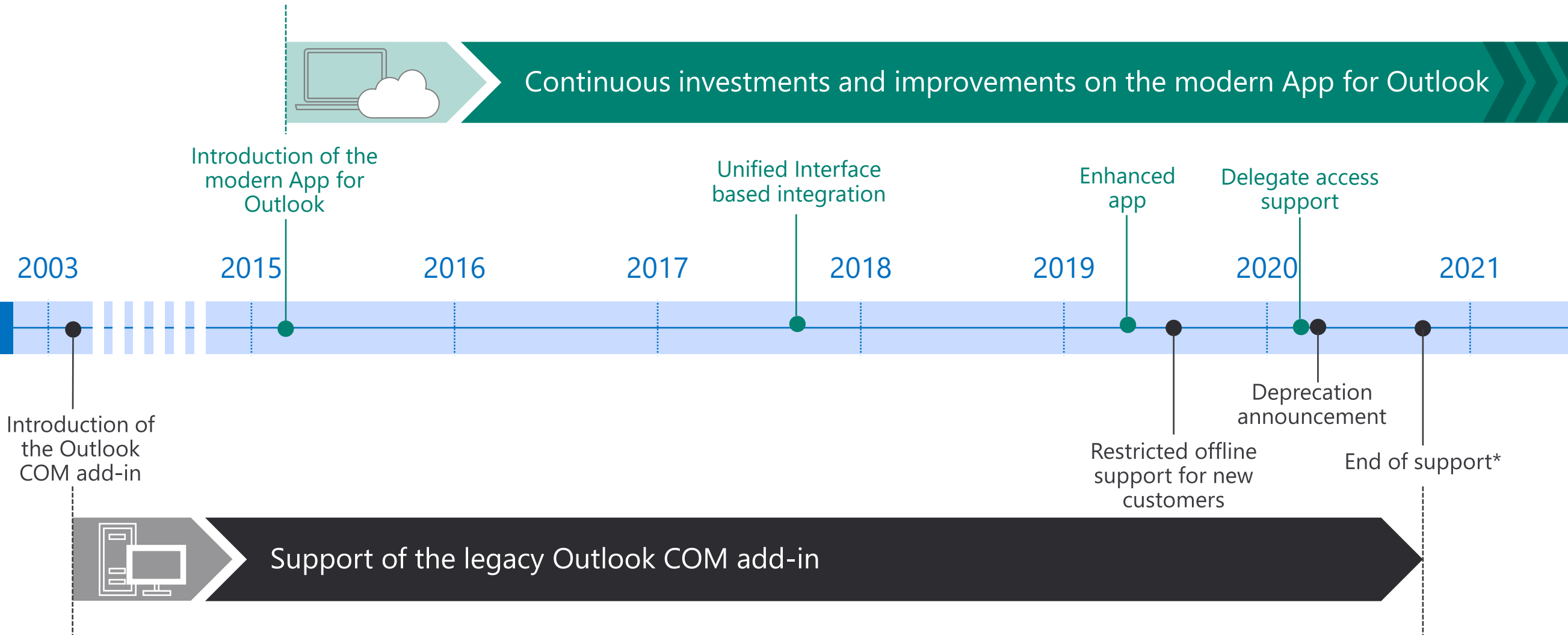


## App for Outlook Tracking Email

Lightweight and contextual



# A history of integration with Outlook





\* The end of support for the Outlook COM add-in described on this slide only applies to Dynamics 365 online customers. For on-premise customers, the Outlook COM add-in lifecycle is tied to the related on-premise product lifecycle (<https://support.microsoft.com/lifecycle/search>)

# Dynamics 365 for Outlook vs App for Outlook



## Older on-premise application model

## Modern SaaS approach

	<b>Dynamics 365 for Outlook (Outlook COM add-in)</b> 	<b>Dynamics 365 App for Outlook</b> 
<b>Technology</b>	Based on COM/VSTO, a legacy Outlook integration model without any active development	Cross-platform Office Add-ins model (Web-based JS/HTML)
	Based on legacy web client ( <u>deprecated</u> )	Based on Unified Interface
	Depends on SQL Server Compact 4.0 ( <u>End of extended support in 2021</u> )	No dependencies on end-of-life features
<b>Performance</b>	Known to affect the client machine's performance	Lightweight integration
<b>Client(s)</b>	Windows + Outlook Desktop	Windows & Mac OS, Outlook Web Access, Smartphone & tablet (iOS/Android)
<b>Deployment</b>	Client installation	Centralized deployment and distribution
	Expensive to deploy and support	Easy deployment and delivery
<b>Security</b>	Full access in client machine/native code	Sandboxed, access through standard Office.js API

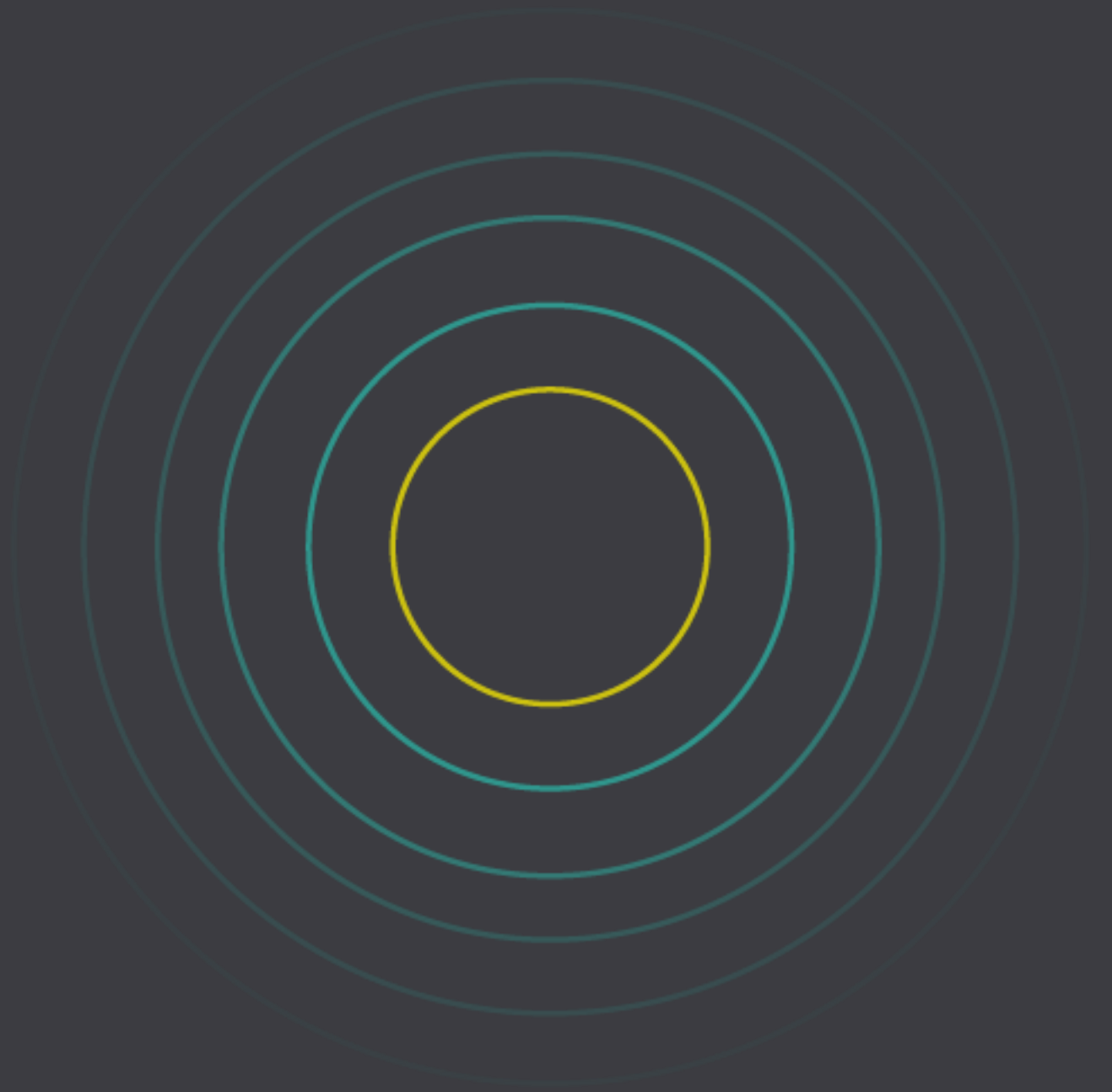
# New Improved Online Solution Available

## App for Outlook and Outlook COM add-in

		 Outlook COM add-in	 App for Outlook
Deployment and Available platforms	One-click install (server-driven deployment)	✗	✓
	Runs Unified Interface	✗	✓
	Role-based access	✗	✓
	Automatic deployment	✗	✓
	Contextual dashboard, customizable	✗	✓
	Presence in Outlook Web Access, Outlook for Mac and Outlook Mobile	✗	✓
Core capability	Track and Set Regarding for emails/appointments/contacts	✓	✓
	Work offline	✓	💡
	Delegate Access	✓	✓
	Track tasks	✓	✓
Productivity	One-click set regarding	✓	✓
	Track multiple items a time against a record	✓	💡
	View recipients' summary	✗	✓
	View regarding record summary in the email/appointment	✓	✓
	View and create Dynamics 365 records	✓	✓
	Insert email templates/sales literature/KB articles	✓	✓
Dependent features	Use custom forms and business logic	✓	✓
	Create Word mail-merge documents ( <u>deprecated</u> )	✓	💡
	Excel Dynamic Worksheet / PivotTable	✓	💡

💡 = Alternative solution available

**TRANSITION**



# Determine the transition path

## Targeted user groups – Incremental approach/Production Pilot

### Benefits

- Easier to get started
- End-user impact is minimized as transition is done in waves
- Areas impacted by issues or gaps can be avoided
- Team learns from experience

### Drawbacks

- Two integrations to support and maintain
- Users on legacy Outlook COM add-in do not get the performance and usability benefits from Dynamics 365 App for Outlook

## Full transition – replace the legacy Outlook COM add-in entirely

### Benefits

- Single integration between Outlook and Dynamics 365 to support and maintain
- All users get the performance and usability benefits from Dynamics 365 App for Outlook

### Drawbacks

- “Big bang” approach is riskier, all issues and gaps need to be considered
- All end users are impacted (training, change management)

## For on-premise customers migrating online

### Benefits

- Dynamics 365 App for Outlook on Dynamics 365 Customer Engagement (on-premise) v9 already uses Unified Interface. As there is a need to move to Unified Interface during an on-premise to online migration, this reduces the efforts to maintain customizations for legacy web client and Unified Interface
- End-user impact is reduced as change management is expected

### Considerations

- Adding the transition to Dynamics 365 App for Outlook does add to the migration workload, but it is offset by less deployment complexity.

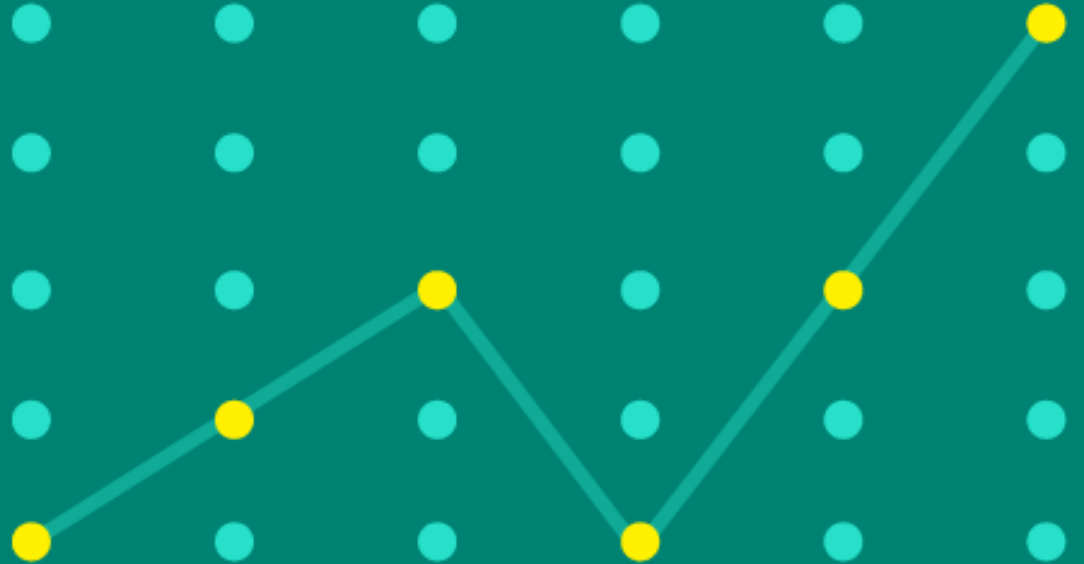
# Establish a workplan for a successful transition to Dynamics 365 App for Outlook

- ✓ **Assess your technical landscape** (i.e. version of Windows, Outlook, Exchange, Form Scripts...)
- \* **Technical landscape: if necessary, plan and perform required updates**
- ✓ **Identify your functional use cases.** Ask your users too, as you could have surprises.
- ✓ **Map used functionalities with App for Outlook capabilities**
- \* **Dynamics 365 App for Outlook capabilities: if there are any gaps, identify workarounds and new alternatives.**
- ✓ **Configure and test Dynamics 365 App for Outlook on a sandbox environment**  
Configure Server-Side Configuration and Dynamics 365 App for Outlook on a sandbox environment
- ✓ **Perform User Acceptance Testing**
- ✓ **Communicate & train your users**
- ✓ **Switch & deploy to all users**
- ✓ **Uninstall the Dynamics 365 for Outlook COM add-in from client machines**
- ✓ **Update your new user onboarding process**





# Assess your technical landscape



# Assess your technical landscape

## What are your current versions?



**Exchange Version(s)**



**Desktop OS**



**Outlook Version(s)**



**Supported browser  
version(s)**

# Assess your technical landscape

## Email Server, Email Client and Browser (Outlook Web Access) Requirements

<b>Email Server</b>	<ul style="list-style-type: none"><li>• <b>Exchange Server 2013</b> CU 14 or greater</li><li>• <b>Exchange Server 2016</b></li><li>• <b>Exchange Online</b></li></ul>
<b>Email Client</b>	<ul style="list-style-type: none"><li>• <b>Outlook 2019</b></li><li>• <b>Outlook 2016 (C2R)</b> version 16.0.93330.2073 or higher (on Windows 7 or higher client OS with IE 11 installed) <i>This is the minimum version supported for delegate access.</i></li><li>• <b>Outlook 2016 (MSI)</b> version 16.0.4266.1001 or higher (on Windows 7 or higher client OS with IE 11 installed)</li><li>• <b>Outlook 2013 (MSI)</b> version 15.0.5023.1000 or higher (on Windows 7 or higher client OS with IE 11 installed) <i>Support for 2013 versions of Office 365 ProPlus ended February 28, 2017</i></li><li>• <b>Outlook for MAC</b></li><li>• <b>Outlook for iOS</b> (with Exchange Online, on Apple iPhone 6S or higher, running iOS version 8 or higher)</li><li>• <b>Outlook for Android</b> (with Exchange Online, on Android phones running Android 4.4,5.0,6.0,or 7.0)</li></ul>
<b>Browser (Outlook Web Access)</b>	<ul style="list-style-type: none"><li>• <b>Microsoft Edge</b> (with Exchange on premise 2016 or higher and Exchange Online)</li><li>• <b>Internet Explorer 11</b> (with Exchange on premise 2016 or higher and Exchange Online)</li><li>• <b>Google Chrome</b></li><li>• <b>Mozilla Firefox</b></li></ul>

# Assess your technical landscape

## Supported configurations with Microsoft Exchange

**Dynamics 365 Customer Engagement apps (Online)**



**Exchange Online**

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**Dynamics 365 Customer Engagement apps (Online)**



**Exchange Server** (on-premise), version 15.0.1236.3.32 (Cumulative Update 14 for Exchange Server 2013) or greater

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**Dynamics 365 for Customer Engagement (on-premise)**  
With Internet Facing Deployment



**Exchange Online**

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**Dynamics 365 for Customer Engagement (on-premise)**  
With Internet Facing Deployment



**Exchange Server** (on-premise), version 15.0.1236.3.32 (Cumulative Update 14 for Exchange Server 2013) or greater

# Assess your technical landscape

## Additional Requirements for consuming Exchange Application “Dynamics 365 App for Outlook”

### Enable OAuth in Exchange

- **Dynamics 365 App for Outlook is an Outlook add-in that uses Exchange Web Services (EWS) to interact with Microsoft Exchange. This requires OAuth be enabled on Microsoft Exchange.**  
For more information regarding this dependency, see [Authentication and permission considerations for the makeEwsRequestAsync method.](#)

### Internet Explorer 11

- **On Windows clients, Internet Explorer 11 should be installed and enabled but not necessarily the default browser.**  
For more information about this dependency, see [Requirements for running Office Add-ins.](#)

# Assess your technical landscape

## Feature support per client

	<b>Received email</b> (view information and track)	<b>Compose email</b> (view information, track, and add templates, knowledge base articles, and sales literature)	<b>Appointments and meetings</b> (view information and track)	<b>Address book contacts</b> (view information and track) Users can still track to new or existing Contacts in Dynamics 365
<b>Outlook 2016</b> (desktop client)	O and M	O and M <sup>1</sup>	O and M <sup>1</sup>	O <sup>3</sup> and M <sup>2</sup>
<b>Outlook 2013</b> (desktop client)	O and M	O and M <sup>1</sup>	O and M <sup>1</sup>	
<b>Outlook for Mac</b> (desktop client)	O and M			
<b>Outlook on the web</b> <sup>4</sup> (OWA)	O and M	O and M <sup>1</sup>	O and M <sup>1</sup>	
<b>Mobile Outlook app</b> <sup>5</sup>	O			

**(O)ne:** Dynamics 365 Customer Engagement apps (Online), Exchange Online with both in the **same** tenant (Multi-tenant configuration of Dynamics 365 Customer Engagement apps (Online) and Exchange Online being in different tenants is not supported)

**(M)ixed:** Dynamics 365 for Customer Engagement, Exchange Server 2013/2016

<https://docs.microsoft.com/dynamics365/outlook-app/deploy-dynamics-365-app-for-outlook#requirements>

(1) Tracking email in compose mode and tracking appointments requires Exchange Server 2013 CU14 or Exchange Server 2016.

(2) Tracking contacts is supported only on Exchange Server 2016 CU3 and Outlook 2016 16.0.6741.1000 C2R version or later. Or, Outlook 2016 MSI version 16.0.4444.1000 or higher with the following KBs installed. For more information, see these KB articles: [KB3118330](#), [KB3118374](#), [KB3118375](#), [KB3115500](#).

(3) Supported only on Outlook 2016 16.0.7426.1049 or later.

(4) Not supported on mobile Outlook Web Access.

(5) Supported on iPhones 6S or higher, with iOS 8 or higher.

# Assess your technical landscape

## Supported browsers for Outlook on the web

You can use Dynamics 365 App for Outlook with Outlook on the web on the following browsers:

- **Internet Explorer 11, or Microsoft Edge**

The following configuration is supported:

- Protected Mode is enabled for Internet security zone. To enable Protected Mode: in IE 11, go to Tools > Internet options > Security tab > Internet.
- Protected Mode is enabled for Local intranet security zone. To enable Protected Mode: in IE 11, go to Tools > Internet options > Security tab > Local intranet.
- Some important URLs should be in the Local intranet security zone list of trusted websites: in IE 11, go to Tools > Internet options > Security tab > Local intranet > Sites > Advanced.

Your Dynamics 365 apps URL, <https://login.windows.net>, \*.microsoftonline.com, and when applicable the ADFS URL and the Exchange on-premise EWS domain.

More information : <https://support.microsoft.com/help/4035750/something-went-wrong-during-sign-in-error-using-dynamics-365-app-for-o>

- **Google Chrome** (latest version) on Windows
- **Firefox** (latest version) on Windows
- **Apple Safari** (version 9 or version 10) on Mac or on OSX

# Assess your technical landscape

## Supported languages

- **Bulgarian** (Bulgaria) - 1026
- **Chinese** (People's Republic of China) - 2052
- **Chinese** (Taiwan) - 1028
- **Croatian** (Croatia) - 1050
- **Czech** (Czech Republic) - 1029
- **Danish** - 1030
- **Dutch** - 1043
- **English** - 1033
- **Estonian** - 1061
- **Finnish** - 1035
- **French** - 1036
- **German** - 1031
- **Greek** - 1032
- **Hebrew** - 1037
- **Hindi** (India) - 1081
- **Hungarian** - 1038
- **Indonesian** - 1057
- **Italian** - 1040
- **Japanese** - 1041
- **Kazakh** - 1087
- **Korean** - 1042
- **Latvian** - 1062
- **Lithuanian** - 1063
- **Malaysian** - 1086
- **Norwegian** - 1044
- **Polish** - 1045
- **Portuguese** (Brazil) - 1046
- **Portuguese** (Portugal) - 2070
- **Romanian** - 1048
- **Russian** - 1049
- **Serbian** - 2074
- **Slovak** - 1051
- **Slovenian** - 1060
- **Spanish** - 3082
- **Swedish** - 1053
- **Thai** - 1054
- **Turkish** - 1055
- **Ukrainian** - 1058
- **Vietnamese** - 1066

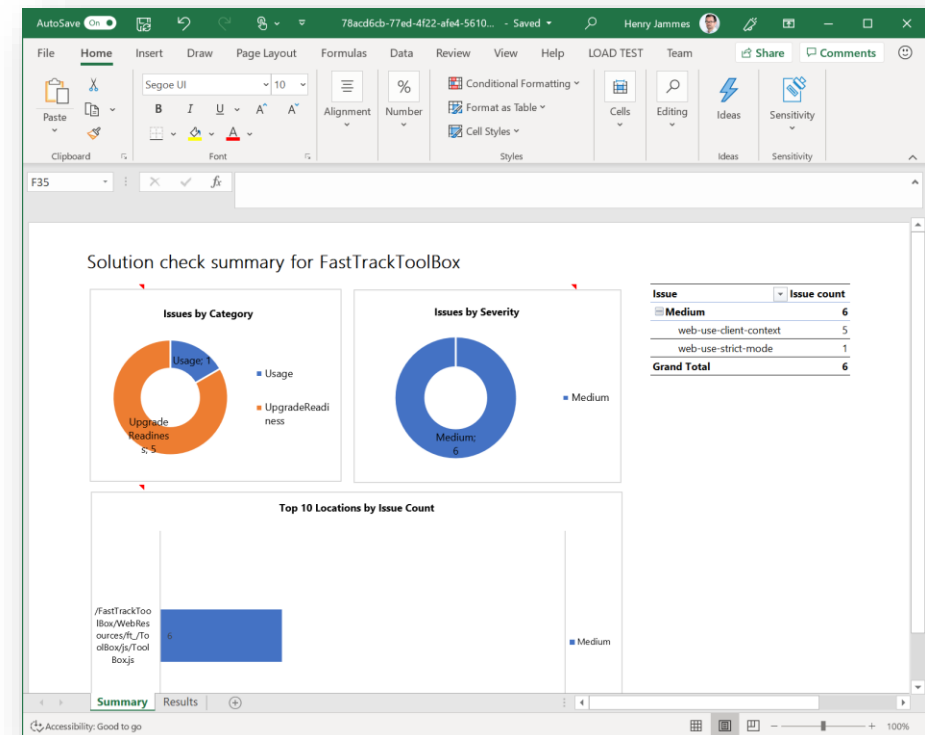
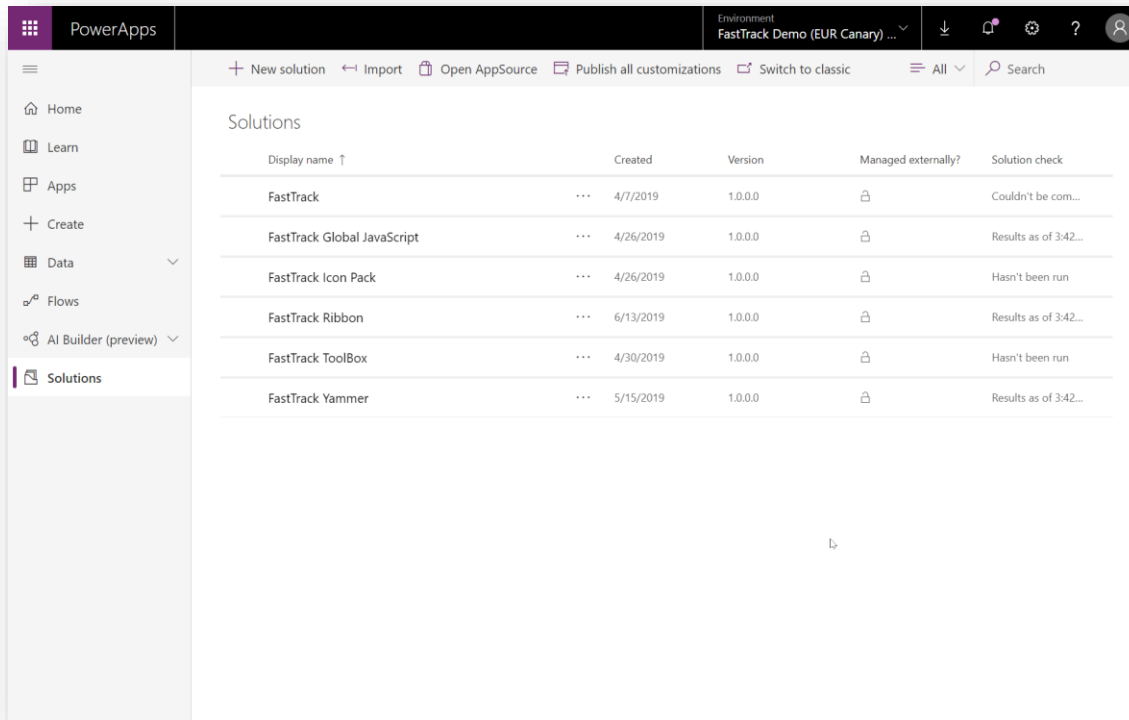


# Assess your technical landscape

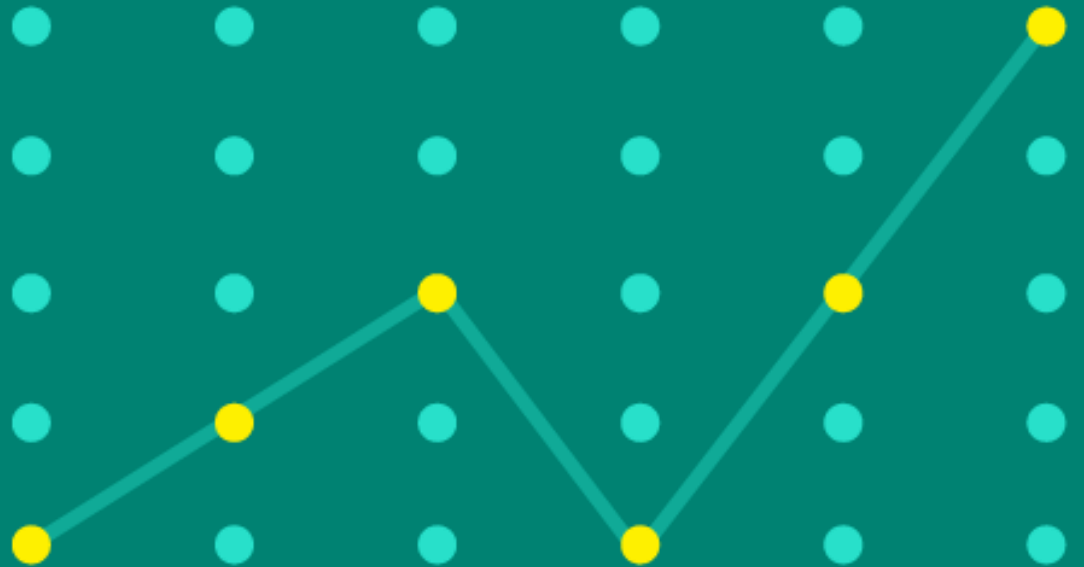
## Validate custom form scripting to make sure they will render well in Dynamics 365 App for Outlook

### Use the Power Apps Solution Checker to check your customizations

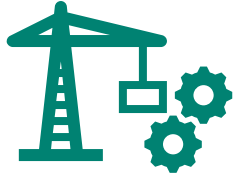
- In [make.powerapps.com](https://make.powerapps.com), select your development environment, and then **go to solutions**.
- **Run the solution checker** on each of your unmanaged solutions to get recommendations and warnings on unsupported and deprecated methods. Among other things, this checks JavaScript web resources.



If necessary,  
plan and perform  
required updates



# Plan and perform required updates



Based on requirements and desired functionalities, upgrade of components might be necessary:



**Microsoft Exchange**



**Microsoft Outlook**



**Microsoft Windows**



**Supported browsers**



**Migrate to Unified Interface**

- ✓ Dynamics 365 App for Outlook exclusively uses Unified Interface
- ✓ Ensure you have migrated or tested your specific experiences

**Minimum Action:**

**Test all Use-Cases inside of Dynamics 365 App for Outlook experience**

App for Outlook uses various out of the box entities like Account, Contact, Lead, Cases and Opportunities Activities, and others could be visible as you have it configured. You will want to test that all those entities work well for the users via App for Outlook because it uses the Unified Interface.

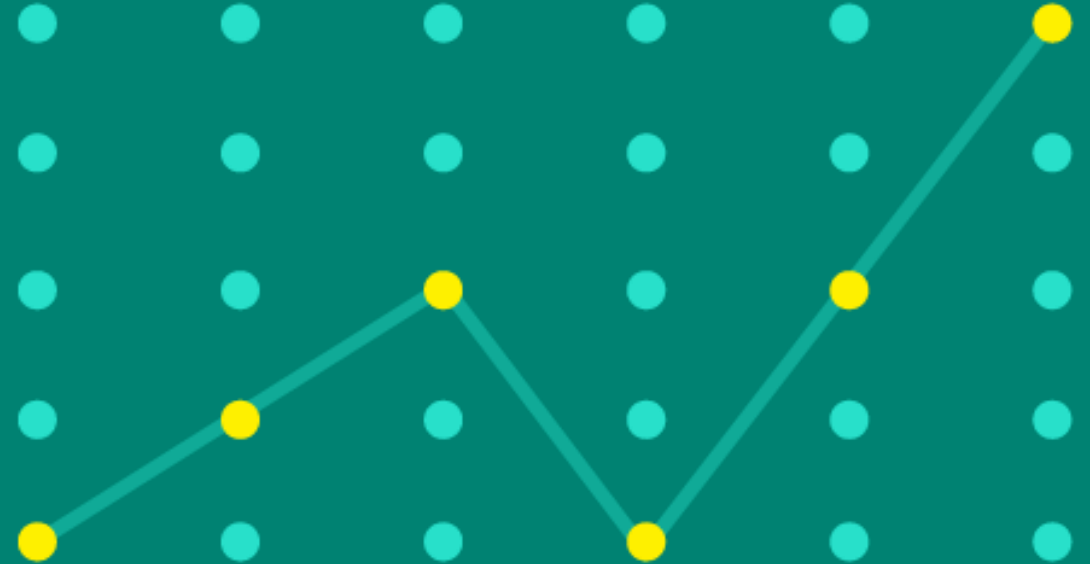
**Best Action:**

**Complete full migration to Unified Interface**

This will ensure cohesive UI experience across all touchpoints for Dynamics 365

- ✓ Learn more in the Unified Interface Playbooks here:  
<https://docs.microsoft.com/powerapps/maker/model-driven-apps/unified-interface-playbook>

Identify your  
functional use cases

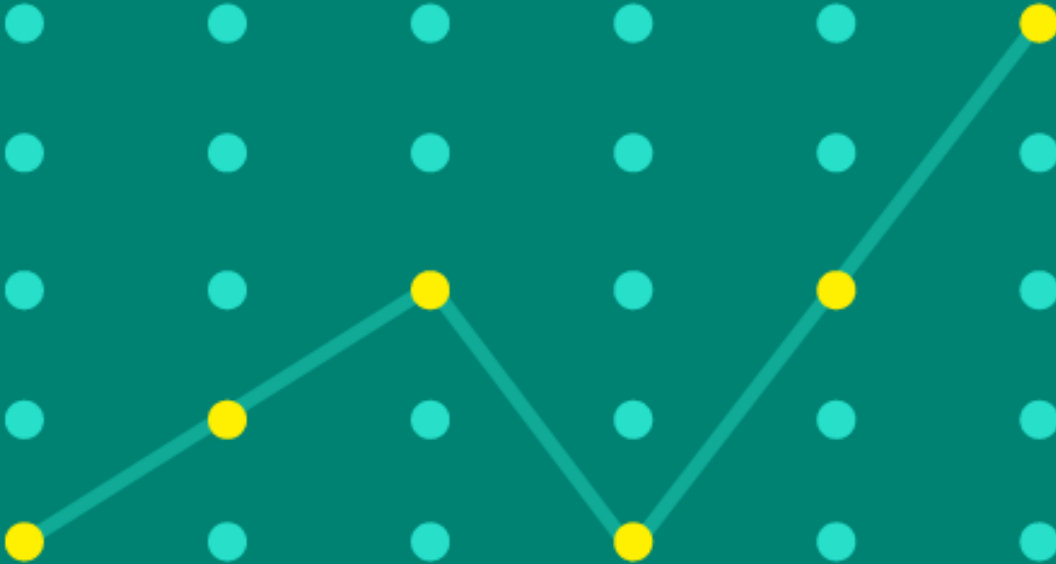


# Identify your functional use cases

## What features related to the legacy Dynamics 365 for Outlook are your users currently using?

		Current use
From Dynamics 365 to Outlook	Send emails from Dynamics 365 with Outlook	Dynamics 365 for Outlook / Server-Side Synchronization
	Synchronize Dynamics 365 appointments, contacts and tasks	Dynamics 365 for Outlook / Server-Side Synchronization
Tracking activities and contacts	Track and Set Regarding for emails	✓ / ✗ / ?
	Track and Set Regarding for appointments	✓ / ✗ / ?
	Track and Set Regarding for tasks	✓ / ✗ / ?
	Track and Set Parent for contacts from address book	✓ / ✗ / ?
Productivity	Convert Email to opportunity	✓ / ✗ / ?
	Convert email to lead	✓ / ✗ / ?
	Convert email to case	✓ / ✗ / ?
	Add connection to an email	✓ / ✗ / ?
	Browse Dynamics 365 data within the Outlook navigation pane	✓ / ✗ / ?
	Work offline	✓ / ✗ / ?
	Import contacts in bulk	✓ / ✗ / ?
	Insert email Templates / Sales literature / KB articles	✓ / ✗ / ?
Dependent features	Create Word mail-merge documents ( <u>deprecated</u> )	✓ / ✗ / ?
	Excel Dynamic Worksheet / PivotTable	✓ / ✗ / ?
Others	?	✓ / ✗ / ?

# Mapping to the new Dynamics 365 App for Outlook capabilities

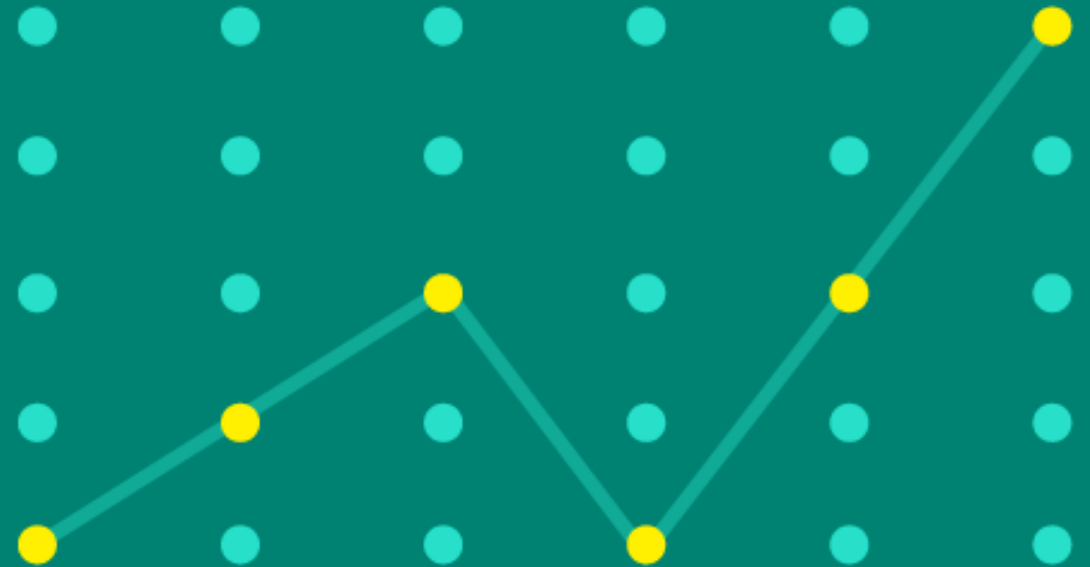


# Mapping to the new App for Outlook capabilities

## Identify the new functional coverage for these features

		New Coverage	
From Dynamics 365 to Outlook	Send emails from Dynamics 365 with Outlook	✓	Server-Side Synchronization
	Synchronize Dynamics 365 appointments, contacts and tasks	✓	Server-Side Synchronization
Tracking activities and contacts	Track and Set Regarding for emails	✓	App for Outlook
	Track and Set Regarding for appointments	✓	App for Outlook
	Track and Set Regarding for tasks	✓	Category Tracking and set Regarding in Dynamics 365
	Track and Set Parent for contacts from address book	✓	App for Outlook
Productivity	Convert Email to opportunity	✓	Track Email to New Opportunity
	Convert email to lead	✓	Quick Create Sender as Lead in Dynamics 365 Or Track Email to New Lead
	Convert email to case	✓	Track Email to New Case
	Add connection to an email	✓	Done in Dynamics 365
	Browse Dynamics 365 data within Outlook navigation pane	✓	Open Dynamics 365 records from Dynamics 365 App for Outlook, or use web access or Dynamics 365 for tablet
	Work offline	💡	Dynamics 365 App
	Import contacts in bulk	✓	Excel Import Directly in Dynamics 365
	Insert email Templates / Sales literature / KB articles	✓	App for Outlook
Dependent features	Create Word mail-merge documents ( <u>deprecated</u> )	💡	Reports, Document Templates, Power Automate
	Excel Dynamic Worksheet / PivotTable	💡	Power Apps Excel add-in or Excel with Power Query

If there are any  
**gaps**, identify  
workarounds and  
new alternatives





# Identify workarounds and new alternatives

## Work offline



### Offline for Dynamics 365 for phones and tablet apps

- ✓ As of March 2020, offline feature is only available for iOS and Android devices. [Windows 10 app offline is on the roadmap.](#)
- ✓ To use the mobile offline feature, download the latest version of the Dynamics 365 for phones and tablet app from the app store. For iOS, version 13.19043.32 or later is supported; for Android, version 4.3.19043.33 or later supported.
- ✓ More information: <https://docs.microsoft.com/dynamics365/mobile-app/setup-mobile-offline-for-admin>



### Offline in Power Apps canvas apps

- ✓ When you build a canvas app, you can perform these tasks:
  - Open Power Apps Mobile and run apps when offline.
  - Determine when an app is offline, online, or in a metered connection by using the Connection signal object.
  - Use collections and leverage the LoadData and SaveData functions for basic data storage when offline.
- ✓ More information: <https://docs.microsoft.com/powerapps/maker/canvas-apps/offline-apps>




### Offline with 3<sup>rd</sup>-party providers (ISV)

- ✓ 3<sup>rd</sup>-party providers sell solutions compatible with Dynamics 365 that provide offline capabilities in Windows 10.

# Identify workarounds and new alternatives

Create Word mail-merge documents

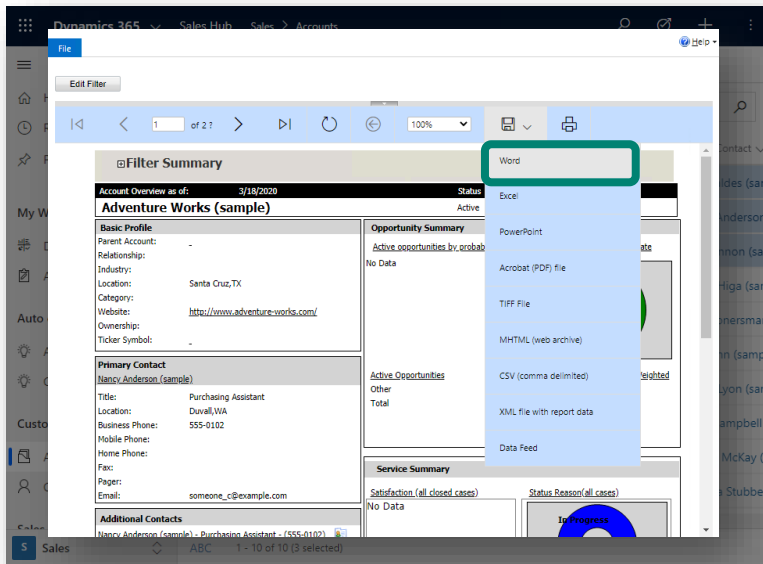
 Word mail-merge has been deprecated since 2018  
<https://docs.microsoft.com/power-platform/important-changes-coming#mail-merge-is-deprecated>



## Alternatives exist with Reports, Document Templates or Power Automate

### Reports

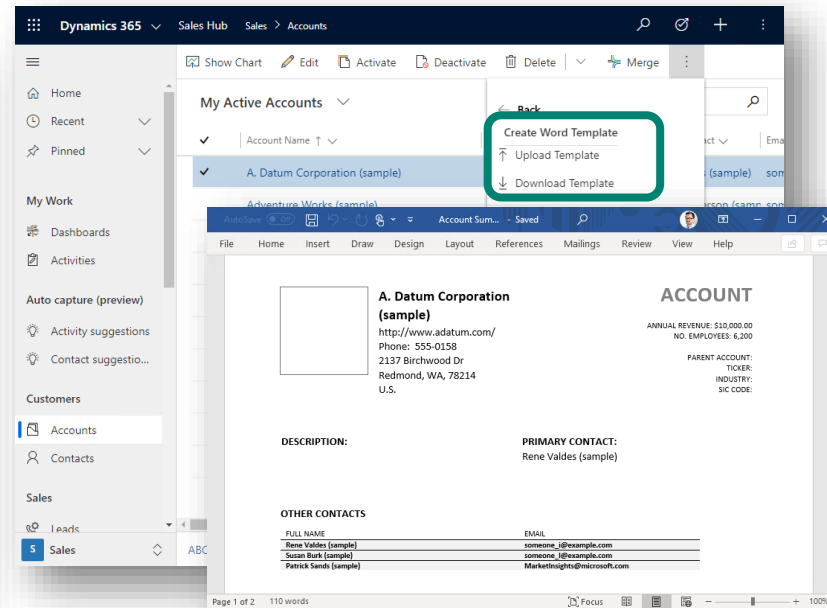
- ✓ Dynamics 365 apps can include reports that render data in a desired layout or format.
- ✓ Reports can be exported as a Word file.
- ✓ Reports can be run against multiple records.
- ✓ Reports are based on SQL Server Reporting Services (SSRS).



<https://docs.microsoft.com/powerapps/maker/model-driven-apps/add-reporting-to-app>

### Document Templates

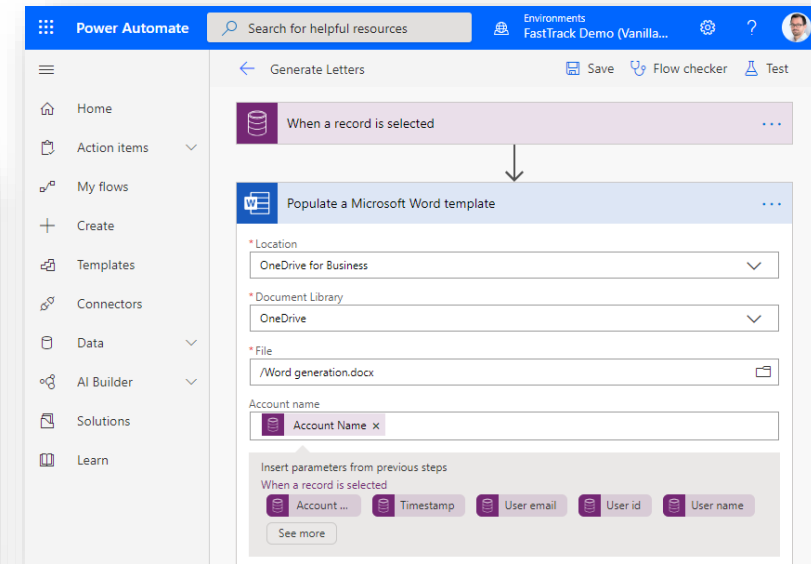
- ✓ You can create and import Word templates into Dynamics 365 apps.
- ✓ With one click, users can generate standardized documents automatically populated with data.
- ✓ Documents can be generated one record at a time.



<https://docs.microsoft.com/power-platform/admin/using-word-templates-dynamics-365>

### Power Automate

- ✓ The Word online (business) connector for Power Automate lets you work with Word files.
- ✓ The "Populate a Microsoft Word template" action reads a Microsoft Word template to then fill the template fields with selected dynamic values from Dynamics 365 data.



<https://flow.microsoft.com/blog/generate-word-documents-in-your-flows/>

# Identify workarounds and new alternatives

Excel Dynamic Worksheet / PivotTable



## Microsoft Power Apps Office Add-in

In Power Apps, by opening entity data in Microsoft Excel, you can quickly and easily **view** and **edit** data by using the Microsoft Power Apps Excel Add-in. The Power Apps Excel Add-in requires Microsoft Excel 2016.

The screenshot shows the Power Apps interface with the 'Entities' list on the left. The 'Opportunity' entity is selected, and the 'Edit data in Excel' option is highlighted. The resulting Excel spreadsheet shows a table of opportunity data with columns for Topic, Currency, Owner, and Status. The Power Apps Office Add-in design pane is visible on the right, showing the entity data source and selected fields.

Topic	Currency (L)	Owner (Lookup)	Status
10 orders of Product SKU JJ202	US Dollar		Won
10 orders of Product SKU AX305 this summer (sample)	US Dollar		Won
Some interest in our JJ line of products (sample)	US Dollar		Won
6 orders of Product SKU JJ202 (sample)	US Dollar		Open
Needs to restock their supply of Product SKU AX305; wil	US Dollar		Open
Very interested in our products - need to follow up (san	US Dollar		Won
They sell many of the same items that we do - need to f	US Dollar		Open
Very likely will order 18 Product SKU JJ202 this year (san	US Dollar		Open
Very likely will order 73 Product SKU JJ105 this year (san	US Dollar		Won
Will be ordering about 110 items of all types (sample)	US Dollar		Open

# Identify workarounds and new alternatives

Excel Dynamic Worksheet / PivotTable



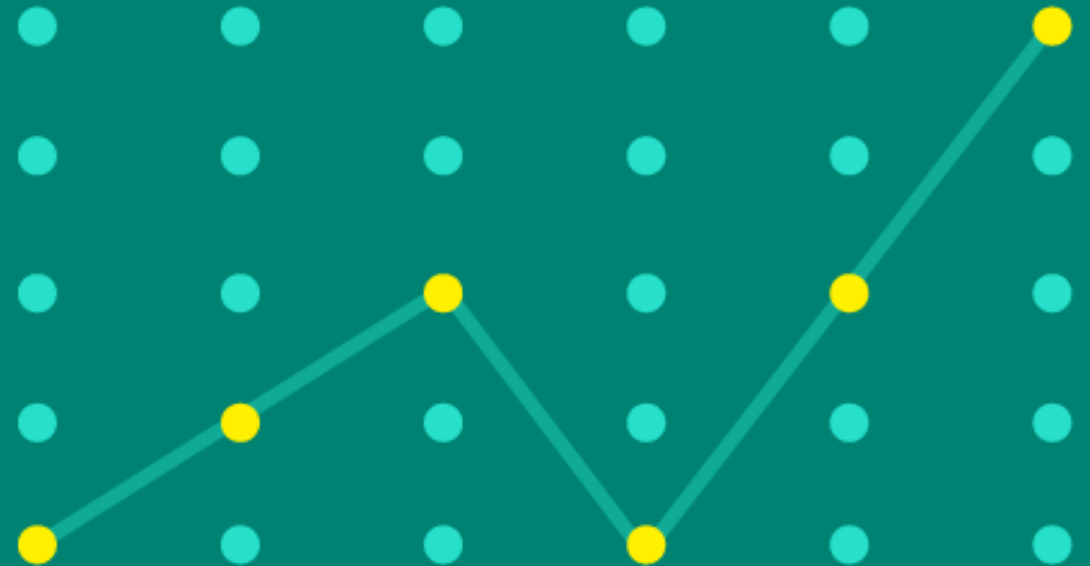
## Microsoft Excel with Power Query

1. Go to the tab "Data"
2. "Get Data"
3. "From Online Services"
4. "From Dynamics 365 (online)"
5. Enter your API URL
6. Select entities and fields

The screenshot illustrates the steps to connect to Dynamics 365 (online) data in Excel. The 'Data' tab is active, and the 'Get Data' menu is open. The 'From Online Services' option is selected, leading to the 'Dynamics 365 (online)' dialog box. The 'Web API URL' is entered as 'https://ftdemo-vanilla.crm.dynamics.com/api/data/v9.1'. The 'Navigator' pane shows the 'opportunities' entity selected. The 'Queries & Connections' pane shows the 'opportunities' query loaded with 10 rows. The main worksheet displays a table with columns: currentsituation, freightamount, finaldecisiondate, modifiedon, and states. The table contains 10 rows of data.

currentsituation	freightamount	finaldecisiondate	modifiedon	states
Sales dropping among younger customers.			3/13/2020 11:33	
Share prices dropping			3/13/2020 11:33	
Large employer nearby offering free product as a benefit.			3/13/2020 11:33	
Sales dropping among younger customers.			3/13/2020 11:33	
Share prices dropping			3/13/2020 11:33	
Large employer nearby offering free product as a benefit.			3/13/2020 11:33	
Sales dropping among younger customers.			3/13/2020 11:33	
Share prices dropping			3/13/2020 11:33	
Large employer nearby offering free product as a benefit.			3/13/2020 11:33	

Configure and test  
Dynamics 365 App  
for Outlook on a  
sandbox environment



# Discover Dynamics 365 App for Outlook and perform initial tests



## Get a first look at the Outlook integration using Dynamics 365 App for Outlook

- ✓ Use a **sandbox environment** like your production environment to test Dynamics 365 App for Outlook.
- ✓ Configure **Server-Side Synchronization** and Dynamics 365 App for Outlook for a test user.
- ✓ **Remove the legacy Dynamics 365 for Outlook** (also known as Outlook COM add-in) for that test user.
- ✓ **Test your business scenarios and customizations.**



If you are already using Server-Side Synchronization, be mindful that a user can only be synchronized with one environment. Consider using a test user and not an actual production user as this could break their production usage.



## Identify gaps

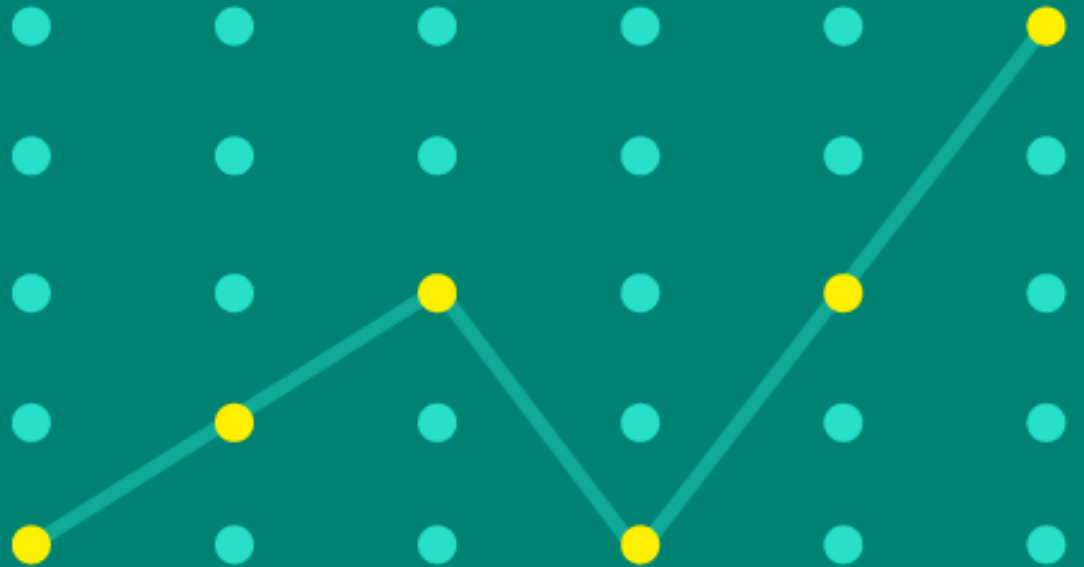
- ✓ Any **business process that needs to be addressed in a different way.**
- ✓ Any potential **regressions.**
- ✓ User **pain points** that could lead to optimizations or specific training.



## Identify opportunities

- ✓ Spot positive experiences **to build up the value proposition** of the transition.
- ✓ And any **potential optimization** for a smoother transition.

# Perform User Acceptance Testing



# Perform User Acceptance Testing



**Validate that your business users can use the new App for Outlook** by performing end-to-end testing on processes where Outlook integration and Exchange integration are involved.



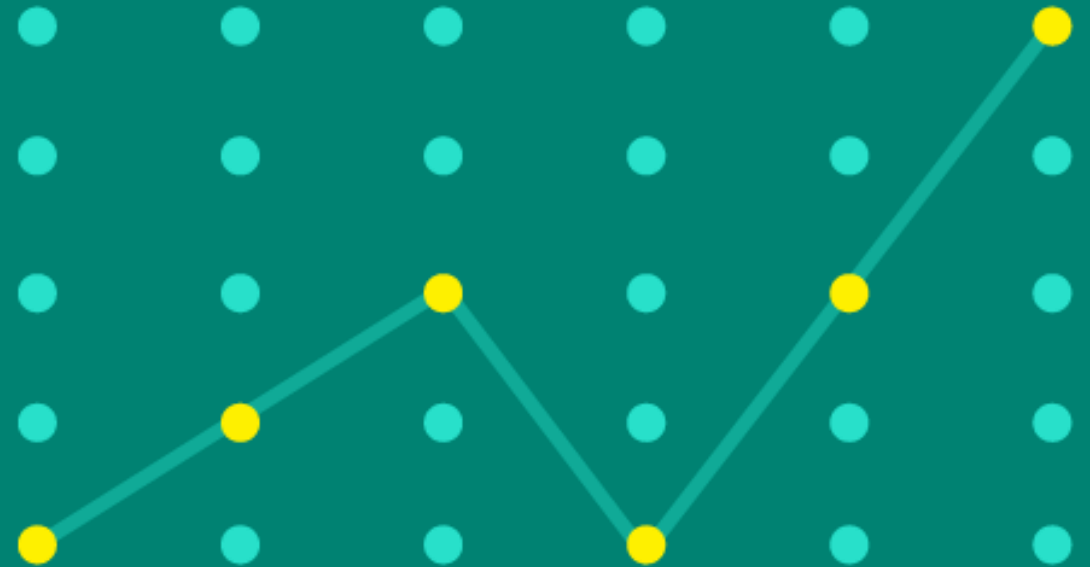
Also consider testing any scenario **where Dynamics 365 for Outlook was required** (i.e. Excel integration, Word mail merge).



**Learn** from these tests to fine-tune Outlook integration scenarios and see this as an opportunity to update or create relevant training content.



Communicate &  
train your users



# Communicate & train your users



## Announce & communicate

- Communicate early on the changes that are coming
- Focus on the productivity enhancements and benefits of the transition
- Encourage and listen to feedback



## Update training documentations

- Refresh existing resources



## Train users

- Through online documentations, on site, through webinars, etc.
- Don't forget your onboarding process for new employees



## Support users

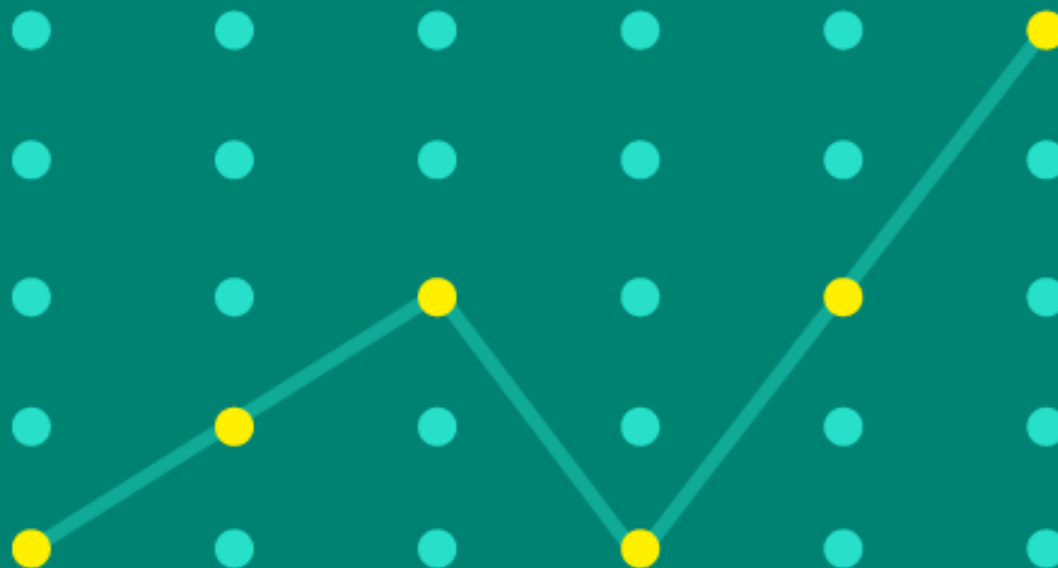
- Leverage your internal support organization and make sure it is ready for Dynamics 365 App for Outlook
- Consider having local power users for level 1 support



## Don't forget to celebrate success!

- Based on the user feedback and measured outcomes, don't forget to celebrate success

# Switch & deploy



# Perform required Configuration in Dynamics 365



**Migrate to Unified Interface or Test 'Dynamics 365 App for Outlook' App Module**

---

1



**Set default Server Profile to Server-Side Sectorization**

2



**Update User Mailboxes to use new Server Profile**

3



**Enable User Security Roles**

4



**Deploy App for Outlook to Users**

# Configure Server-Side Configuration and Dynamics 365 App for Outlook

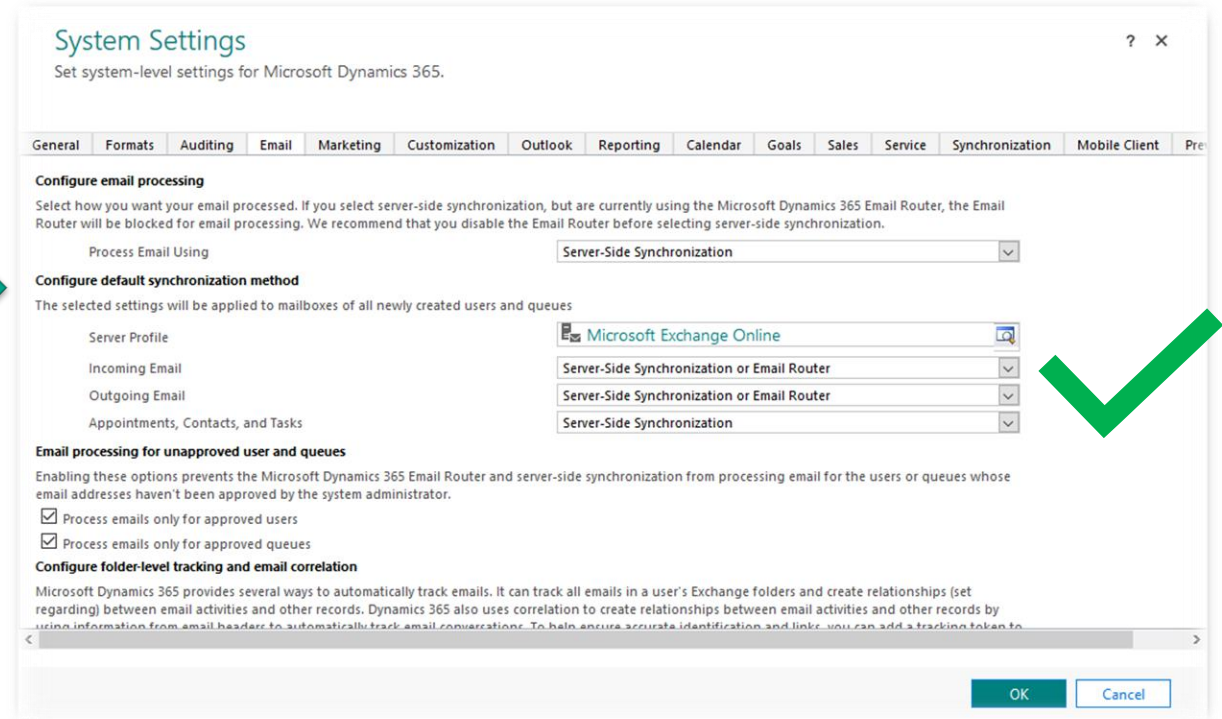
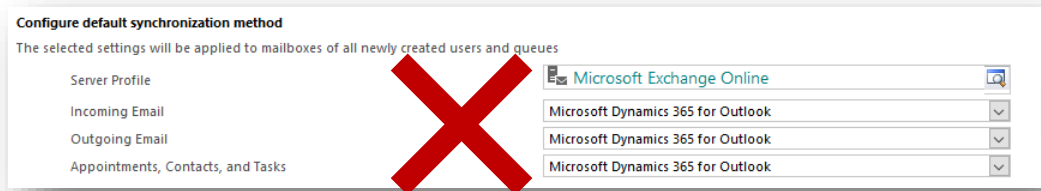
## 1. Set Server-Side Synchronization as Default Server Profile, replacing Dynamics 365 for Outlook

When using Dynamics 365 App for Outlook, all processing will happen via Server-Side Synchronization. This is done in Exchange itself, which is where the App for Outlook is deployed from. No processing will happen from the Outlook desktop client itself, reducing load and providing anywhere, anytime sync.

In the web app, go to “Advanced Settings” **Settings > Administration > System Settings**

### Required Action:

Remove “Microsoft Dynamics 365 for Outlook” method



Be sure to Click OK so the new settings take effect

Documentation: [Set up server-side synchronization of email, appointments, contacts, and tasks](#)

# Dynamics 365 Configuration



## 2. Update Mailbox Synchronization Profiles in Dynamics 365

Be sure to update all existing user's mailbox profiles to the new synchronization method.



If it's not already the case, have a tenant admin (global admin or Dynamics 365 / Power Platform admin + Exchange admin) [approve email addresses](#), or [remove requirement to approve mailboxes](#)

### Required Action: Set mailboxes to the default profile

1. In the web app, go to "Advanced Settings"  
**Settings > Email Configuration > Mailboxes.**
2. Choose **Active Mailboxes.**
3. Select **Apply Default Email**
  - ✓ Check "All records on all pages in the current view"
  - ✓ **Tip:** Be sure to check Test Email Configuration options
4. Click Ok to finish!

Documentation: [Configure Mailboxes](#)

Select the records you want to apply the default email settings to. The default settings are defined in the Email tab of the System Settings dialog box.

**Apply Default Email Settings to**

- Selected records on the current page
- All records on the current page
- All records on all pages in the current view

**Test Email Configuration**

- After the default settings are applied, test the configuration and then enable the mailboxes.
- If this mailbox was previously configured to sync with another organization, checking this option will switch it to sync with this organization. [What's this?](#)

OK Cancel

# Dynamics 365 Configuration



## 3. User Security configuration requirements for App for Outlook

Dynamics 365 App for Outlook is an App Module. The minimum set of privileges required to run App for Outlook are packaged as a security role called **Dynamics 365 App for Outlook User** which is bound to the App. You need to add users to this role in order for them to access Dynamics 365 App for Outlook. In order to achieve this, follow the steps below:

1. Go to "Advanced Settings" then from the main menu navigate to **Settings > Security > Users**.
2. Select the users from the list and then click **Manage Roles**.
3. In the dialog that appears, apply the '**Dynamics 365 App for Outlook User**' security role to the users.

✓ This will ensure that the users have the basic privileges needed to access App for Outlook.

Other security privileges on top of the basic privileges, related to the user's role, will light up more features. For example, if a user has the Create privilege on the Lead entity, in addition to Dynamics 365 App for Outlook User security role, they would see an email resolve to a Lead entity where applicable.

Documentation: [Requirements](#)

# Dynamics 365 Configuration

## 4. Deploy Dynamics 365 App for Outlook

To enable App for Outlook:

1. Go to "Advanced Settings" then from the main menu navigate to **Settings > Dynamics 365 App for Outlook**
2. Click "Add App for All Eligible Users"

- ✓ **Tip A:** Setup Automatic Deployment
- ✓ **Tip B:** Use this grid to verify deployment

Documentation : [Deploy Dynamics 365 App for Outlook](#)

## Getting Started with Microsoft Dynamics 365 App for Outlook



Microsoft Dynamics 365 App for Outlook is an Office add-in that you can quickly add to your users' mailbox so they can track communication and review Dynamics 365 for Customer Engagement applications' information in Outlook.

! Note: For users to be eligible for Dynamics 365 App for Outlook, they need to:

1. Have server-side synchronization [set up on their mailbox](#) for incoming emails and for appointments, contacts and tasks. [Learn more](#)  
Verify that the mailboxes are [tested and enabled](#).
2. Have the **Dynamics 365 App for Outlook User** security role. [Learn more](#)

### Documentation

Review the Dynamics 365 App for Outlook requirements [here](#).

Explore the Dynamics 365 App for Outlook user guide [here](#).

You can customize Dynamics 365 App for Outlook to [control the list of entities that appear in the Regarding lookup](#) and [add a custom entity to the quick create menu](#).

Are your users not seeing the default Dynamics 365 App for Outlook dashboard? [View this information](#) to troubleshoot.

View the [server-side synchronization dashboard](#) to get a quick look at the health of mailboxes, which could affect user eligibility for Dynamics 365 App for Outlook.

Questions? Review the [troubleshooting guide](#).



Automatically add Dynamics 365 App for Outlook to all eligible users. [See more](#)

Save

All Eligible Users ▾

ADD APP FOR ALL ELIGIBLE USERS

<input type="checkbox"/>	Full name	Status	Enabled for I...	Enabled for A...	↻
	Alan Steiner	Added to Outlook	Yes	Yes	





# Optional: Setup Delegate Access in App for Outlook



Set up delegate access in Outlook to **give someone permission to act on your behalf**.

*For example, you might want an assistant to create and respond to email or meeting requests for you and then track the information in Common Data Service using the Dynamics 365 App for Outlook.*

To enable delegate access, you need to enable the OrgDBOrgSetting tool in your environment.

In the tool, find the TrackAppointmentsFromNonOrganizer and DelegateAccessEnabled settings and set both to True (if not already set to True) and then select Update.

Click a setting row for more details at the bottom of the page. NOTE: you should not change any setting without having a specific reason to do so.

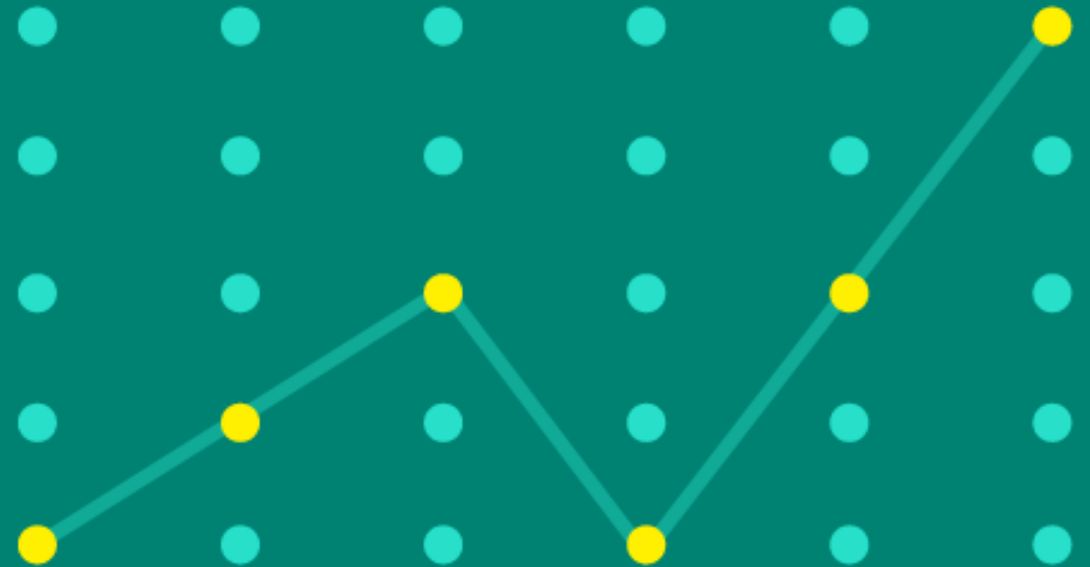
SetRegardingLookupDefaultEntityType		not set	String	-	-	Add	KB 2691237
SharingLimitForPOASnapshotTable	10	not set	Number	1	2147483647	Add	KB 2691237
SkipAadGroupObjectCidValidation	False	not set	Boolean	-	-	Add	KB 2691237
SkipGettingRecordCountForPaging	false	not set	Boolean	-	-	Add	KB 2691237
SkipGettingRecordCountForPagingForAudit	false	not set	Boolean	-	-	Add	KB 2691237
SkipSuffixOnKBArticles	false	not set	Boolean	-	-	Add	KB 2691237
SocialPaneQueryHint	-1	not set	Number	-1	-	Add	KB 2691237
SortEmailsByReceivedOn	false	not set	Boolean	-	-	Add	KB 2691237
SortURIQueryParameters	true	not set	Boolean	-	-	Add	KB 2691237
StoreOutlookSyncDataInSensitivityProperty	true	not set	Boolean	-	-	Add	None
TabletClientMaxFields	75	not set	Number	1	500	Add	None
TabletClientMaxLists	10	not set	Number	1	50	Add	None
TabletClientMaxMashups	3	not set	Number	1	100	Add	KB 2691237
TabletClientMaxTabs						Add	None
TotalRecordThresholdSwitchToMultipleLineT						Add	KB 2691237
TraceExchangeSyncData						Add	KB2691237
TraceLogPersistenceTimeInDays						Add	KB 2691237
TrackAppointmentsFromNonOrganizer		true				Add	KB 2691237
TrackCategorizedItems						Add	KB 2849744
UseCrmOrganizerForEmptyExchangeOrganize						Add	KB 2691237
UseDeletePrivilegeInsteadOfAppendToForChildEntityDelete	false	not set	Boolean	-	-	Add	KB 2691237
UseFilteringMethodOfSyncingMailboxOnlyForCorrelation	false	not set	Boolean	-	-	Add	KB 2691237
UseOrganizationServiceForMultiEntityQuickFind	true	not set	Boolean	-	-	Add	KB 2691237
UsePlainTextForEmailTemplateBody	false	not set	Boolean	-	-	Add	KB 2691237
UseXAnchorMailboxInExchangeRequestHeader	false	not set	Boolean	-	-	Add	KB 2691237
VerboseErrorsOnPromoteToCRM	0	not set	Number	0	1	Add	KB 2691237
VisibleRecordThresholdSwitchToMultipleLineTVF	250	not set	Number	0	250	Add	KB 2691237
WorkflowXamlValidationErrorMessageReport	False	not set	Boolean	-	-	Add	KB 2691237
YammerGroupId	null	null	Number	0	-		Yammer & CRM
YammerNetworkPermalink	null	null	String	-	-		Yammer & CRM
YammerOAuthAccessTokenExpired	null	null	Boolean	-	-		Yammer & CRM

TrackAppointmentsFromNonOrganizer true

Update Reset Default Remove Setting Cancel

Allows CDS server side sync to track appointments where the syncing user mailbox was \*NOT\* the organizer of the appointment. Default value is set to true.

Uninstall the  
Dynamics 365 for  
Outlook COM add-in



# Uninstall the Dynamics 365 for Outlook COM add-in

## Either from:



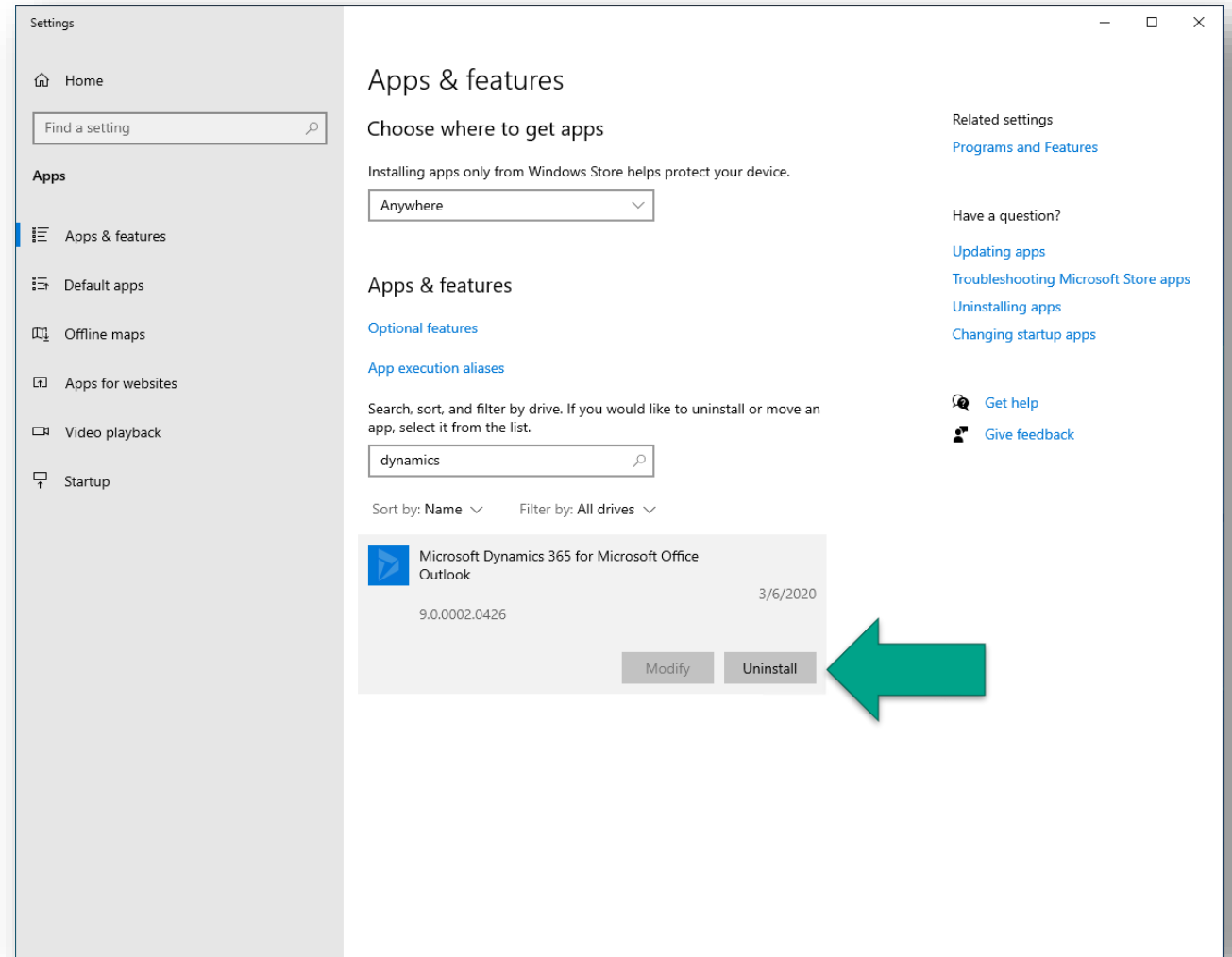
### From individual client machines

- ✓ Go to your **Settings** and **Apps & features**
- ✓ Uninstall **Microsoft Dynamics 365 for Microsoft Office Outlook**



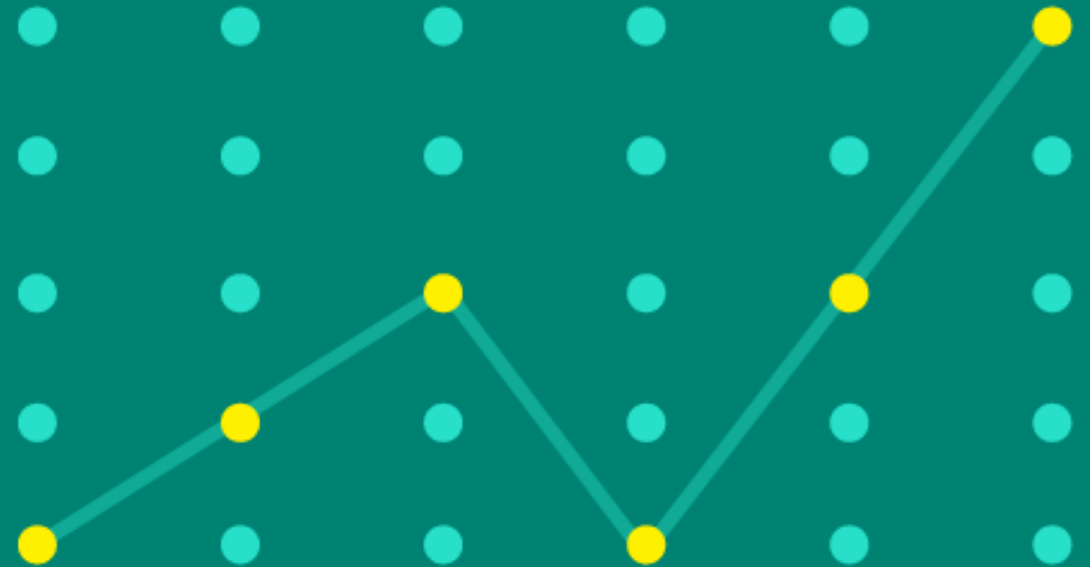
### Uninstall for all your users

- ✓ By **Group Policy**
- ✓ Through **SCCM**



Documentation: [Advanced deployment options](#), and [Uninstall or repair](#)

# Update your new user onboarding process



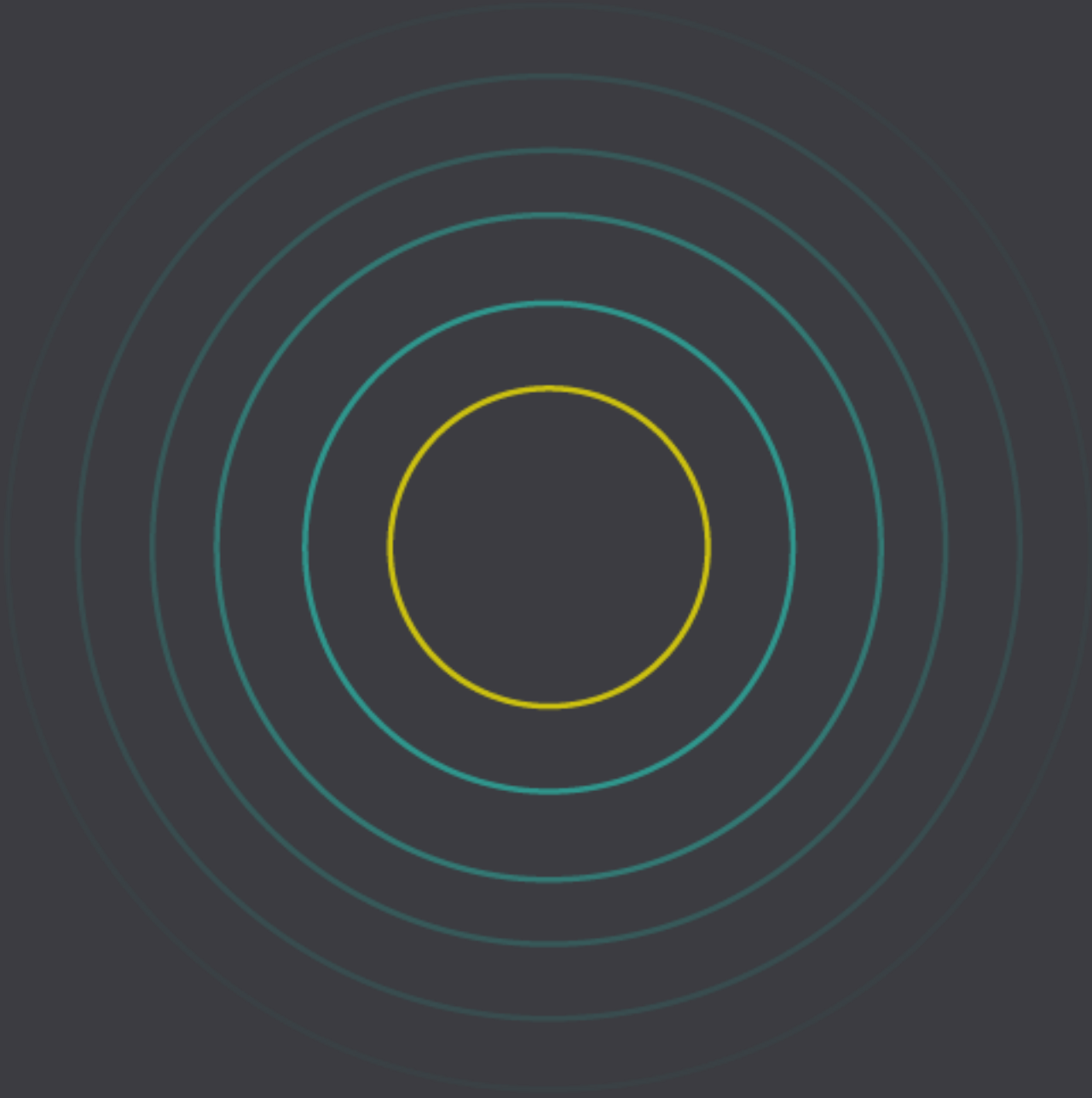
# Update your new user onboarding process



## Update your user onboarding procedure

- ✓ User email approval
- ✓ Test & Enable mailbox
- ✓ Add Dynamics 365 App for Outlook to users (*this can be automated*)

**FAQ**



# Frequently Asked Questions

## Common concerns (1/3)

	Concern	Answer
1	<p>“We are still on Outlook/Exchange 2010 and/or CRM 2013 and will not be moving to the cloud.”</p>	<p><i>Outlook and Exchange 2010 are going to be out of support by Oct 2020.</i></p>
2	<p>“We are using the Outlook COM add-in for our offline needs on a Windows device and cannot switch to a mobile device.</p> <ol style="list-style-type: none"><li>With plugin execution in offline mode</li><li>With dependency on offline data store.”</li></ol>	<p><i>Offline for Windows 10 App is in the future roadmap</i></p> <ol style="list-style-type: none"><li><i>With support for expressions that mimic client/server plugins</i></li><li><i>Build a model-driven or canvas app that works offline</i></li></ol>
3	<p>“We need support for a delegate user to be able to go into Outlook and track appointments on users’ behalf.”</p>	<p><i><u>Delegate support</u> is already available for Exchange Online customers</i></p>
4	<p>“We need support for dynamic spreadsheets so users can work with Dynamics 365 views data in a spreadsheet on their machine.”</p>	<p><i>In Excel, natively connect to Dynamics 365 with Power Query</i></p>

# Frequently Asked Questions

## Common concerns (2/3)

	Concern	Answer
5	"Are there general guidelines to be considered to track sent items?"	<i>Please refer to that article: <a href="https://community.dynamics.com/crm/b/crminthefield/posts/dynamics-365-app-for-outlook-part-4-working-with-emails">https://community.dynamics.com/crm/b/crminthefield/posts/dynamics-365-app-for-outlook-part-4-working-with-emails</a></i>
6	"When creating a new Case as the regarding record from a received email, I want to automatically pre-fill case details with the email information"	<i>This can be achieved by applying a setting to your environment and by using the App for Outlook Case Quick Create. Please raise a support request. You can reference: FCB.MailAppPrepopulateFormsCase</i>
7	"We need to track multiple emails at a time, so that users are productive in Outlook."	<i>On the roadmap. In the meantime, track via category in bulk and set regarding via App for Outlook one item at a time.</i>
8	"I want to see emails that are sent from Dynamics 365 with Server-Side Synchronization in the "Sent Items" folder in Outlook"	<i>This can be achieved by applying a setting to your environment. Please raise a support request. You can reference: FCB.SSSSaveOutgoingEmailToExchangeSentFolder</i>

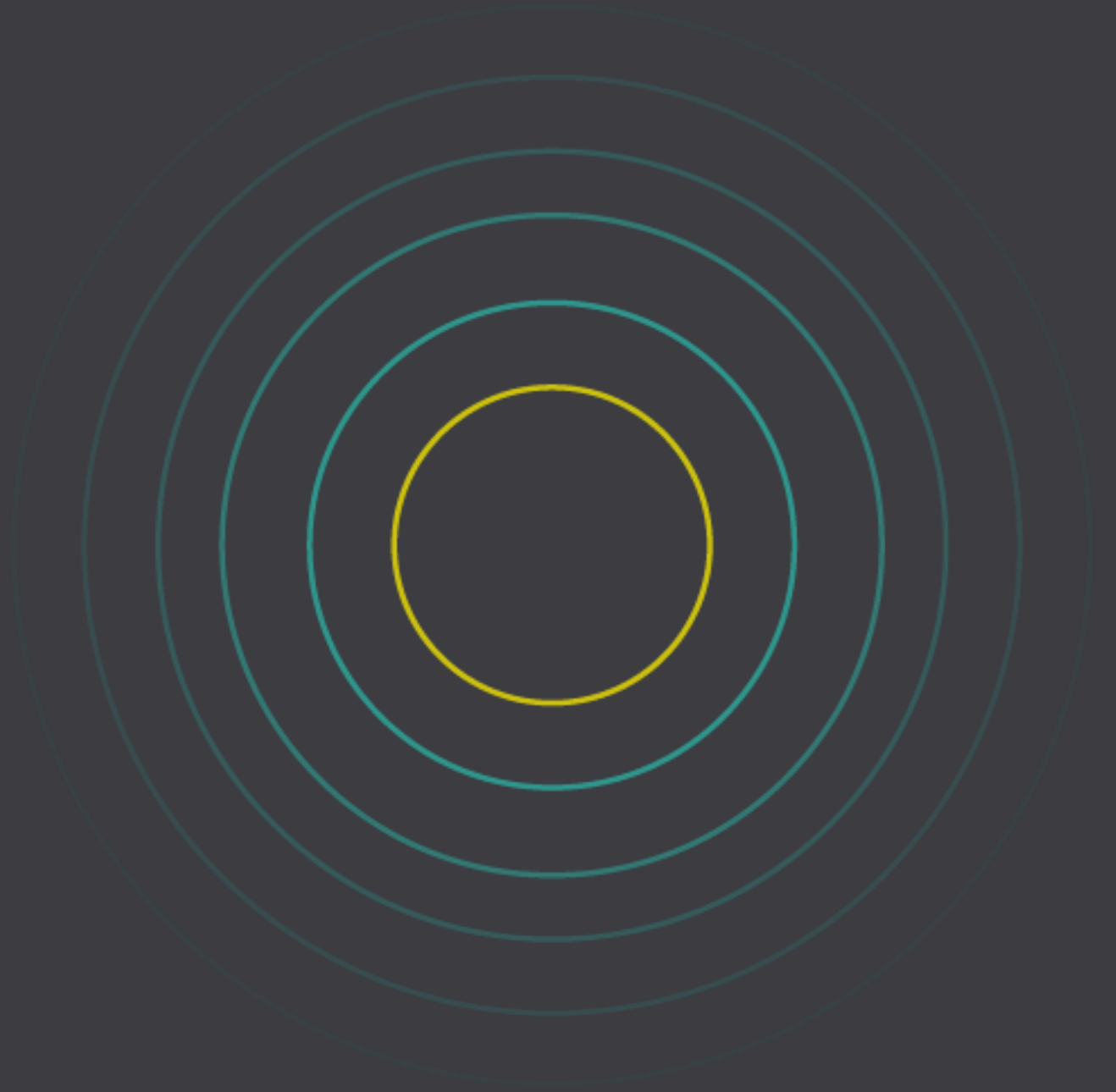


# Frequently Asked Questions

## Common concerns (3/3)

	Concern	Answer
9	<p>“My appointment attendees receive meeting updates when I update my appointment in Dynamics 365, why?”</p>	<p><i>This is normal behavior with Server-Side Synchronization. Appointments in Dynamics 365 are considered meetings in Outlook, and hence send Meeting Requests and Updates. You can review the <a href="#">synchronized fields</a> between Outlook and Dynamics 365 to see what triggers updates in Outlook.</i></p> <p><i>You can leverage the <a href="#">OrgDBOrgSetting AllowSaveAsDraftAppointment</a>. Setting it to “true” will provide the capability to create appointments in Dynamics 365 as “draft” without synchronizing with Exchange. Appointment form will have a “Save as Draft” command and a “Send” command, so that you can save, add details and update an appointment activity without synchronizing to Exchange.</i></p>
10	<p>“Can Dynamics 365 App for Outlook be installed for users that use the Outlook COM add-in to track emails from a mailbox that is not tied to the same Dynamics 365 environment or even tenant?”</p>	<p><i>The App for Outlook can only be displayed and used in the context of the server-side sync configured mailbox for an individual environment. It is not supported to have the same Exchange mailbox configured for multiple environments when using server-side sync or Outlook client</i></p>
11	<p>“A 3<sup>rd</sup>-party Outlook add-in disables the Dynamics 365 App for Outlook, what can I do”</p>	<p><i>You should reach out to the add-in provider and require that they fix their add-in that interferes with standard modern Office add-ins.</i></p>

**Call to Action:**  
Transition to the  
App for Outlook



# Resources

## Official Messaging

[Announcement blog article](#)

## Official Documentation

<https://docs.microsoft.com/dynamics365/outlook-app/dynamics-365-app-outlook-user-s-guide>

## App for Outlook 10+ Part Blog Series from Microsoft Premier Services

<https://community.dynamics.com/crm/b/crminthefield/posts/dynamics-365-app-for-outlook-part-1-the-basics>



Thank you!



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