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

Microsoft

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	COMPARISON	TRANSITION	FAQ
Understanding the value proposition of Dynamics 365 App for Outlook	Understanding the history of both integrations and key differences	Transitioning to the modern App for Outlook	Frequently Asked Questions

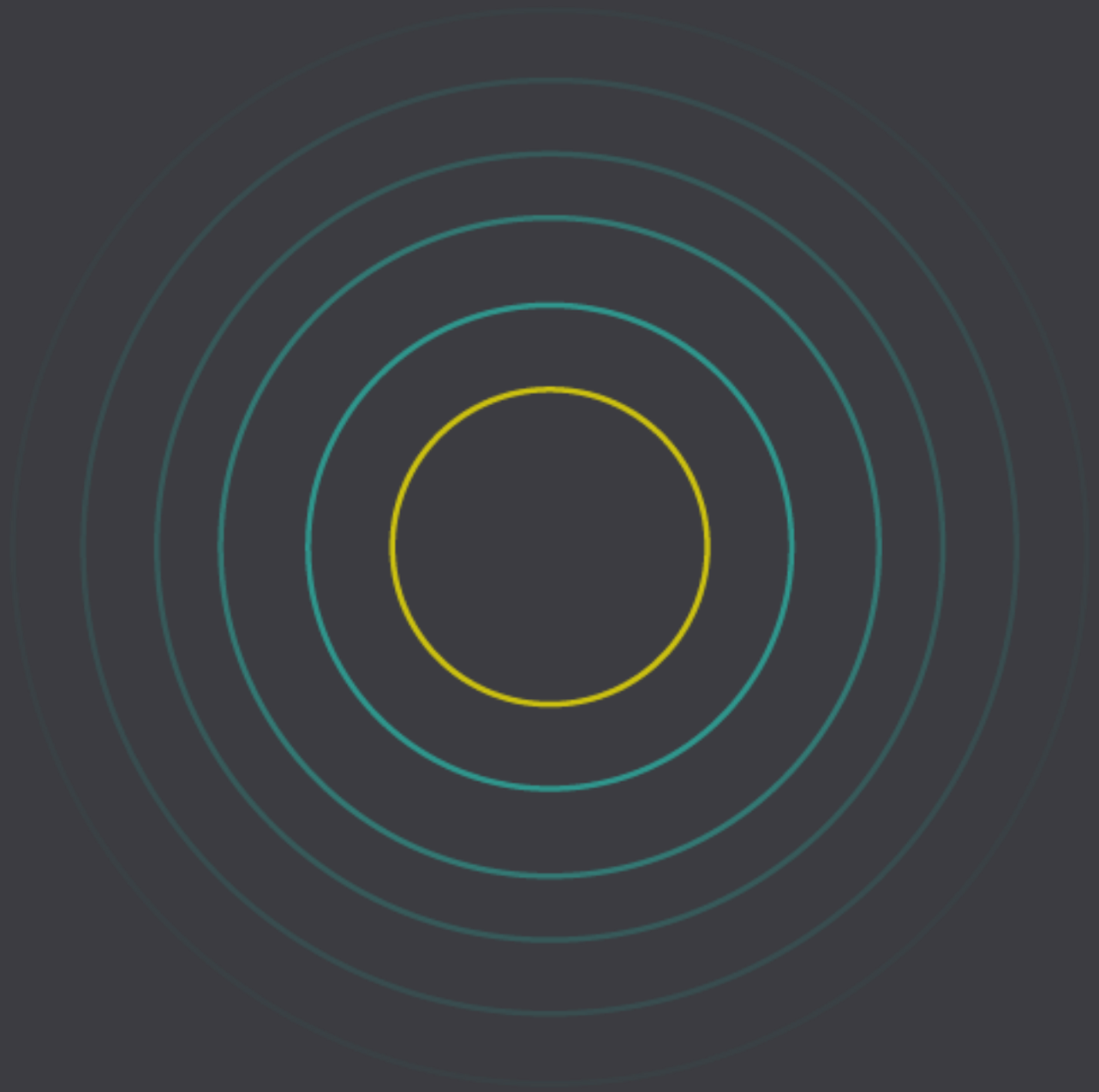
Introduction

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.

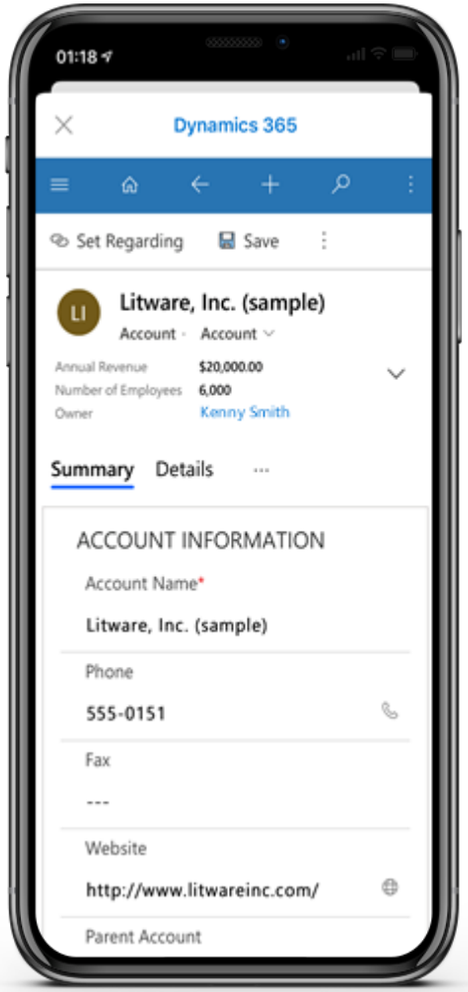
Introduced in 2015 and continuously updated, the modern **Dynamics 365 App for Outlook** is functionally on par with the Outlook COM add-in while bringing additional capabilities, such as seamless deployment, availability across desktop, web, and mobile, and runs on Unified Interface.

Dynamics 365 App for Outlook

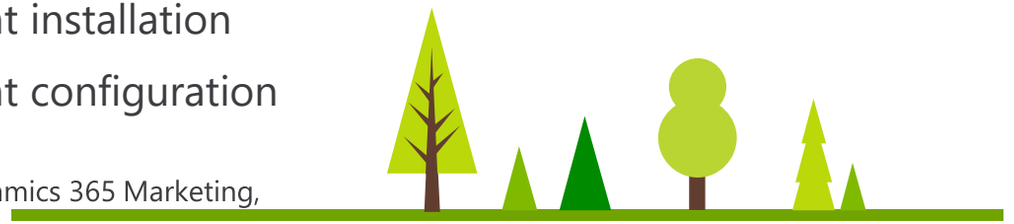


Overview of the Dynamics 365 App for Outlook

With Dynamics 365 App for Outlook, you can:



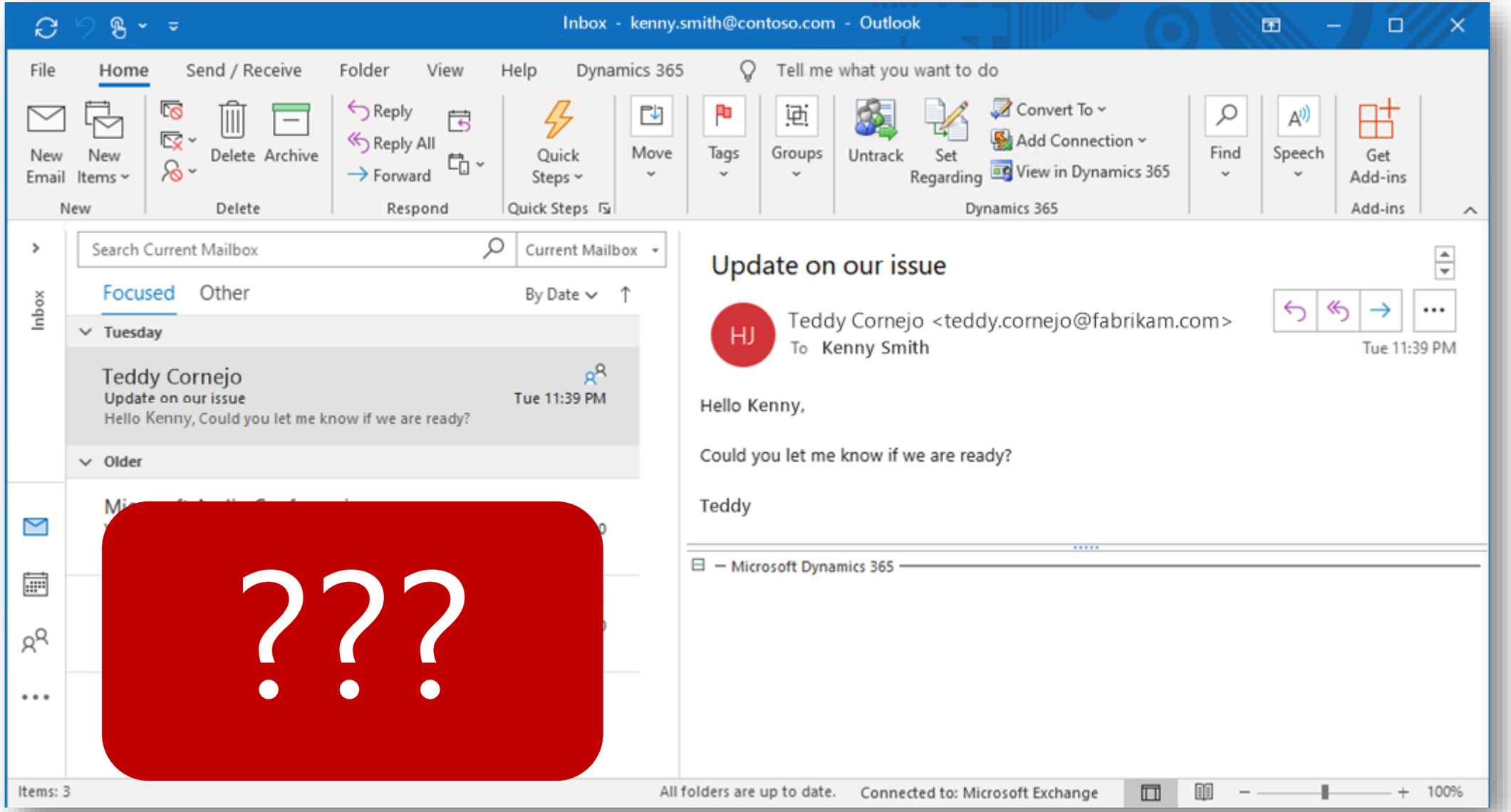
- ✓ View information about Dynamics 365 app* contacts and leads while you're working in Outlook. You can view this info in the context of an email message, meeting, or appointment. For example, view phone numbers, company name, last and next activities, and recent records from Dynamics 365 app.
- ✓ Track 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

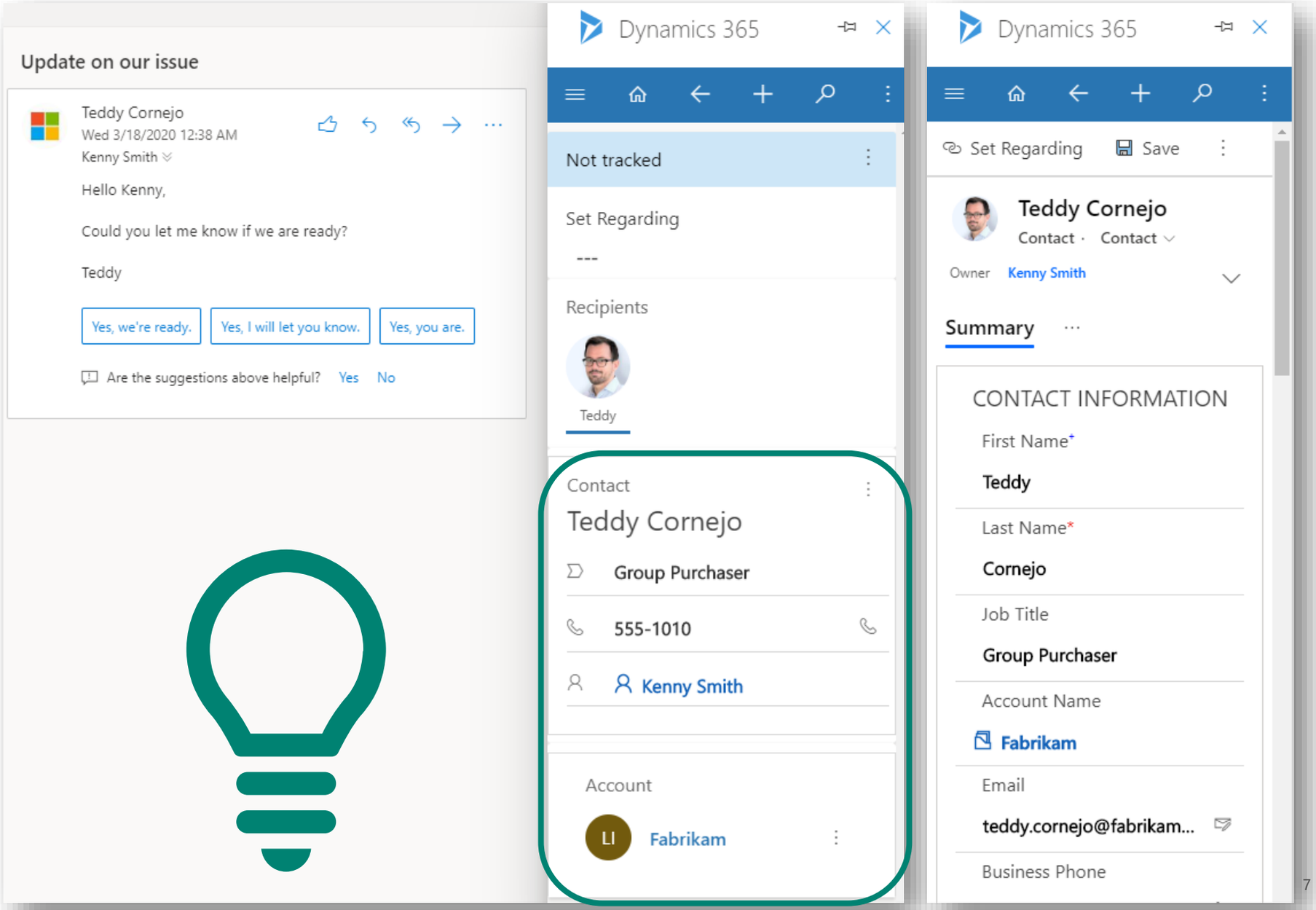
Scrambling to find context and find relevance – searching manually across systems…



After Dynamics 365 App for Outlook

Improve efficiency when working in Outlook

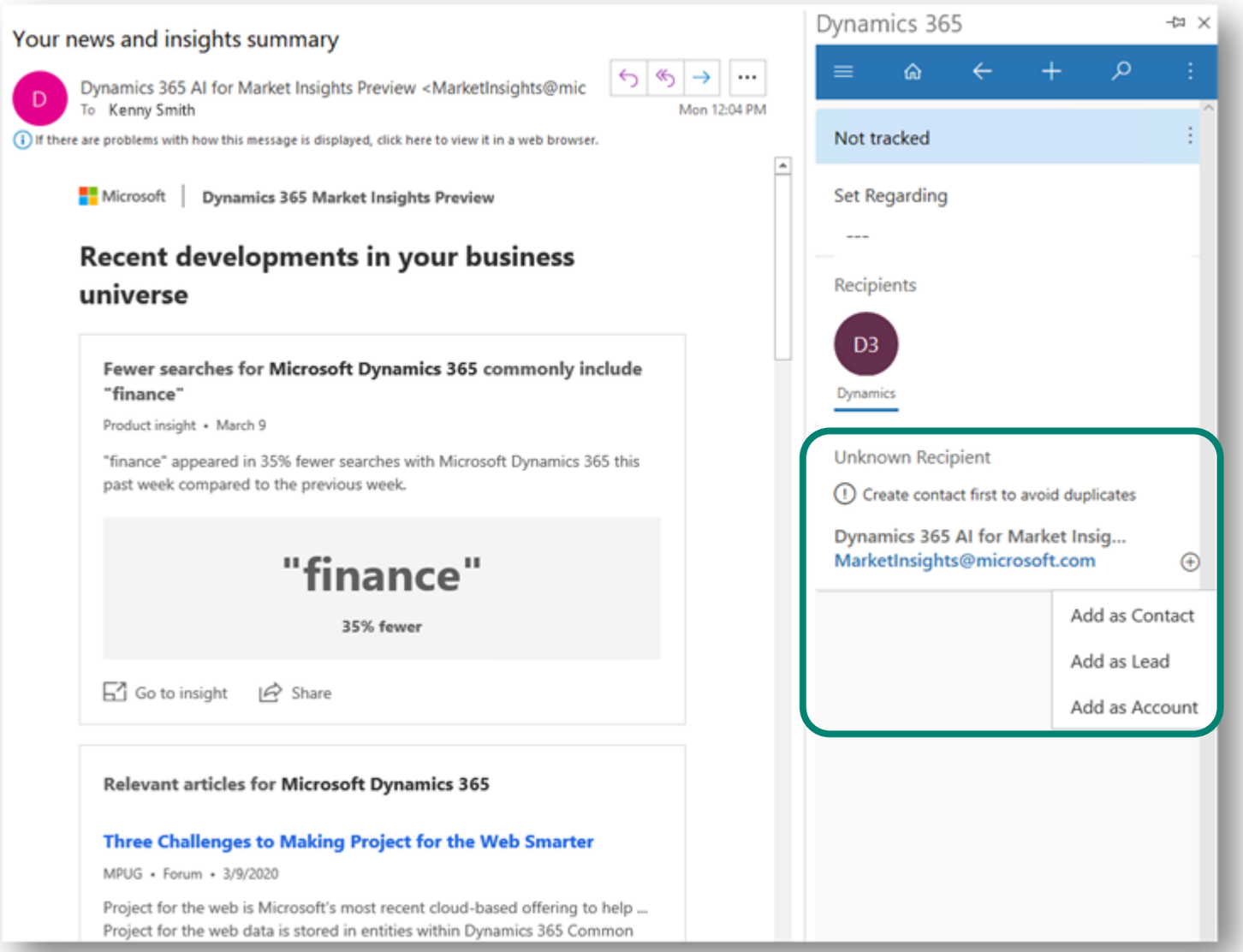
Automatic Sender recognition drives better context awareness allowing your users to quickly get context of the customer and navigate to their records from Dynamics 365 all without leaving the email or Outlook!



Improve efficiency when working in Outlook

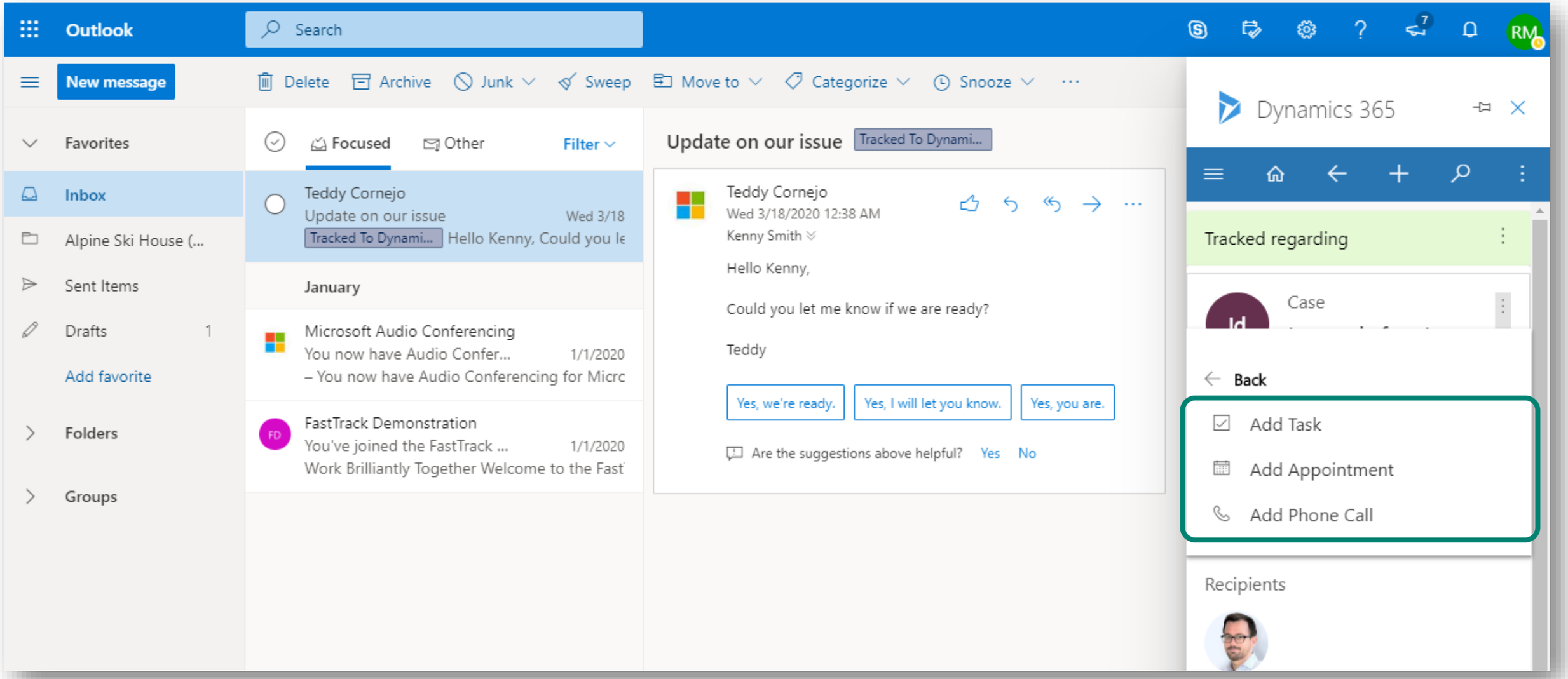
Quickly create new contacts, leads or accounts from unknown recipients

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.



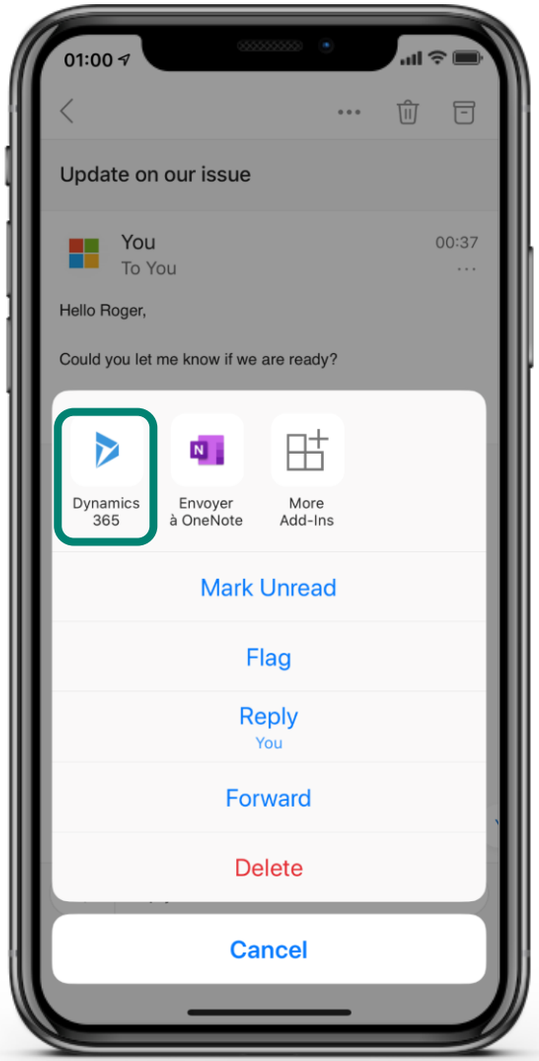
Improve efficiency when working in Outlook

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



Work on the go in Microsoft Outlook Mobile App

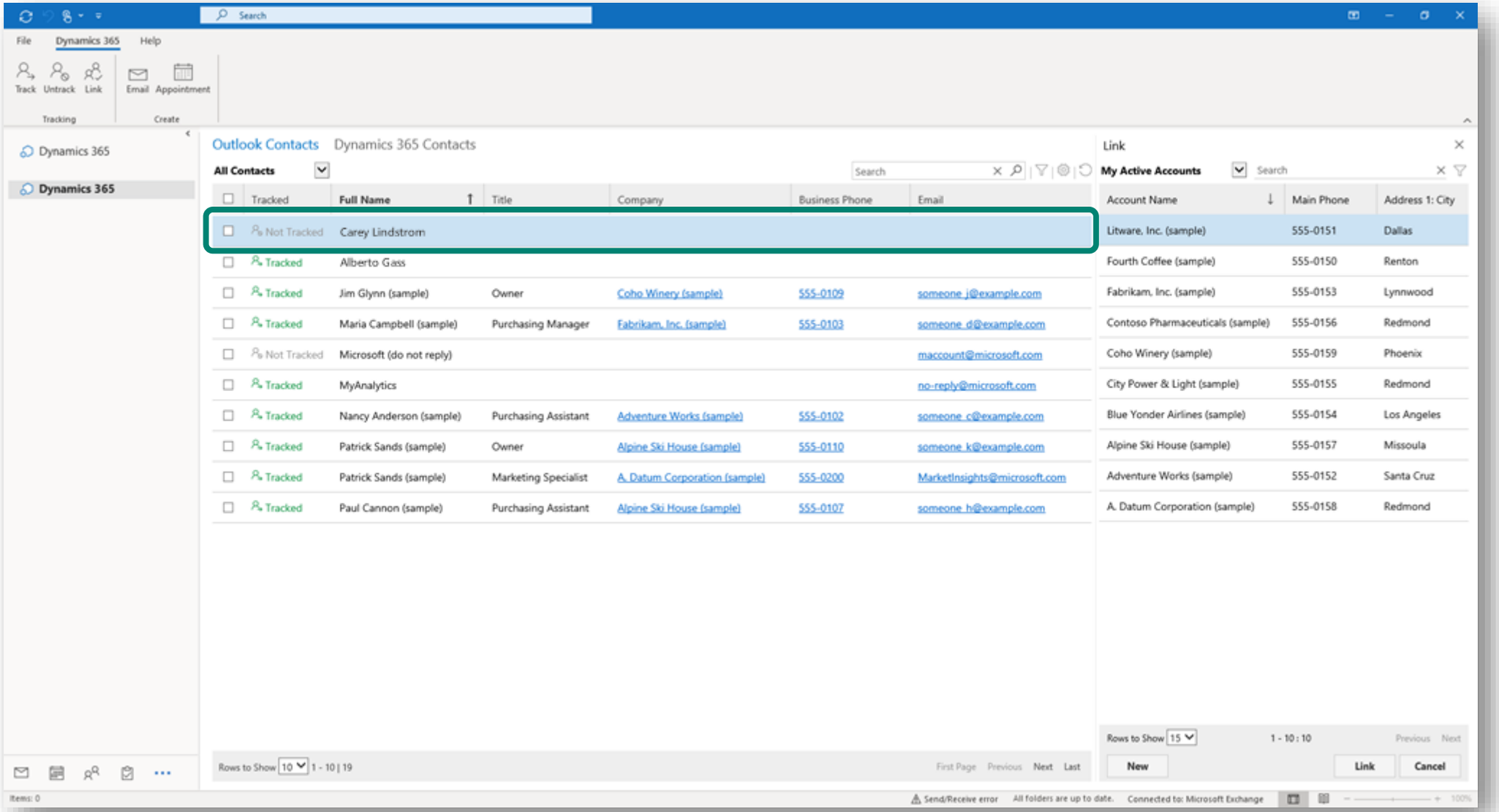
Now on the go!



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

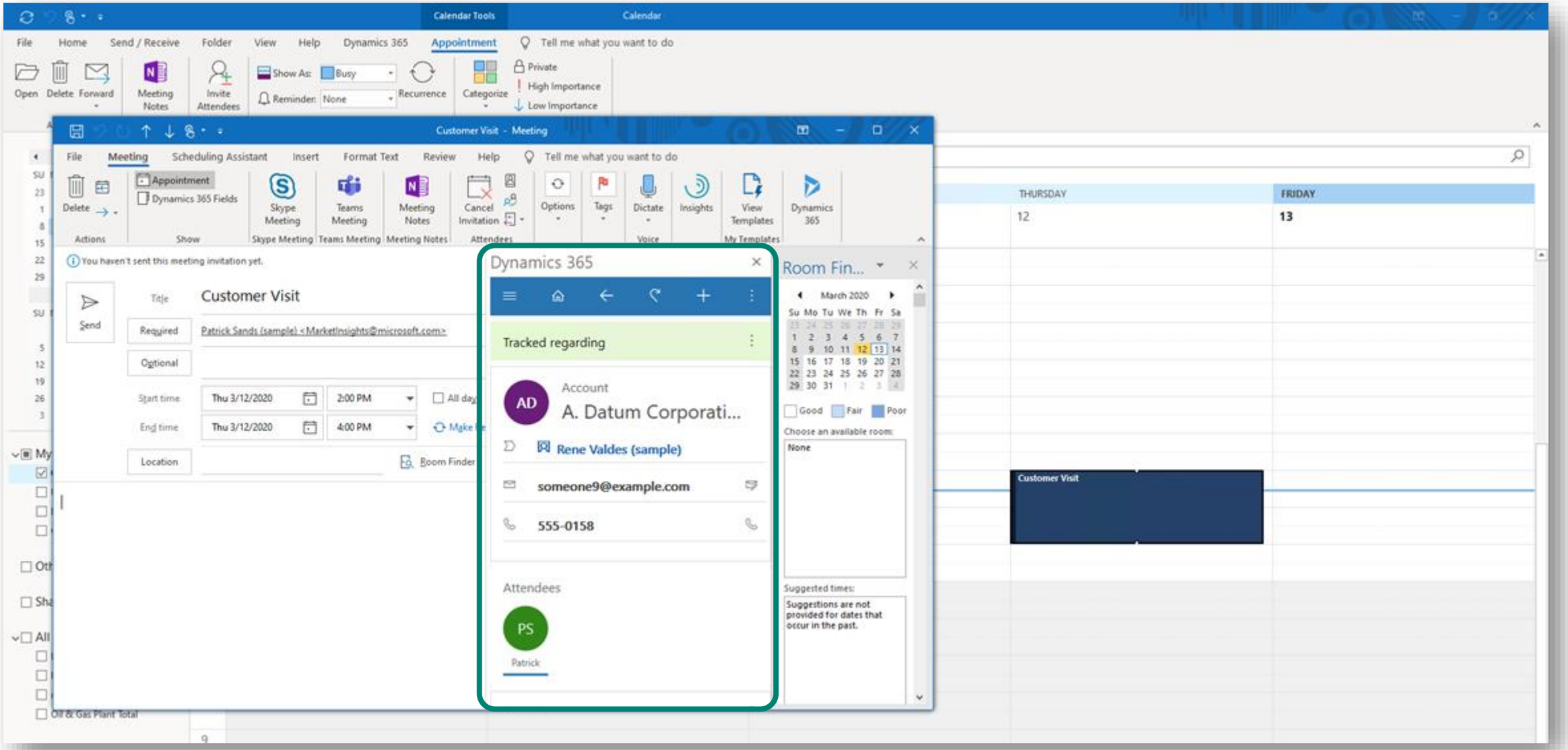
Track contacts with Dynamics 365 App for Outlook

Link contacts from your Outlook Address Book to Dynamics 365 accounts



Track appointments with Dynamics 365 App for Outlook

Get contextual information on related record and attendees



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.

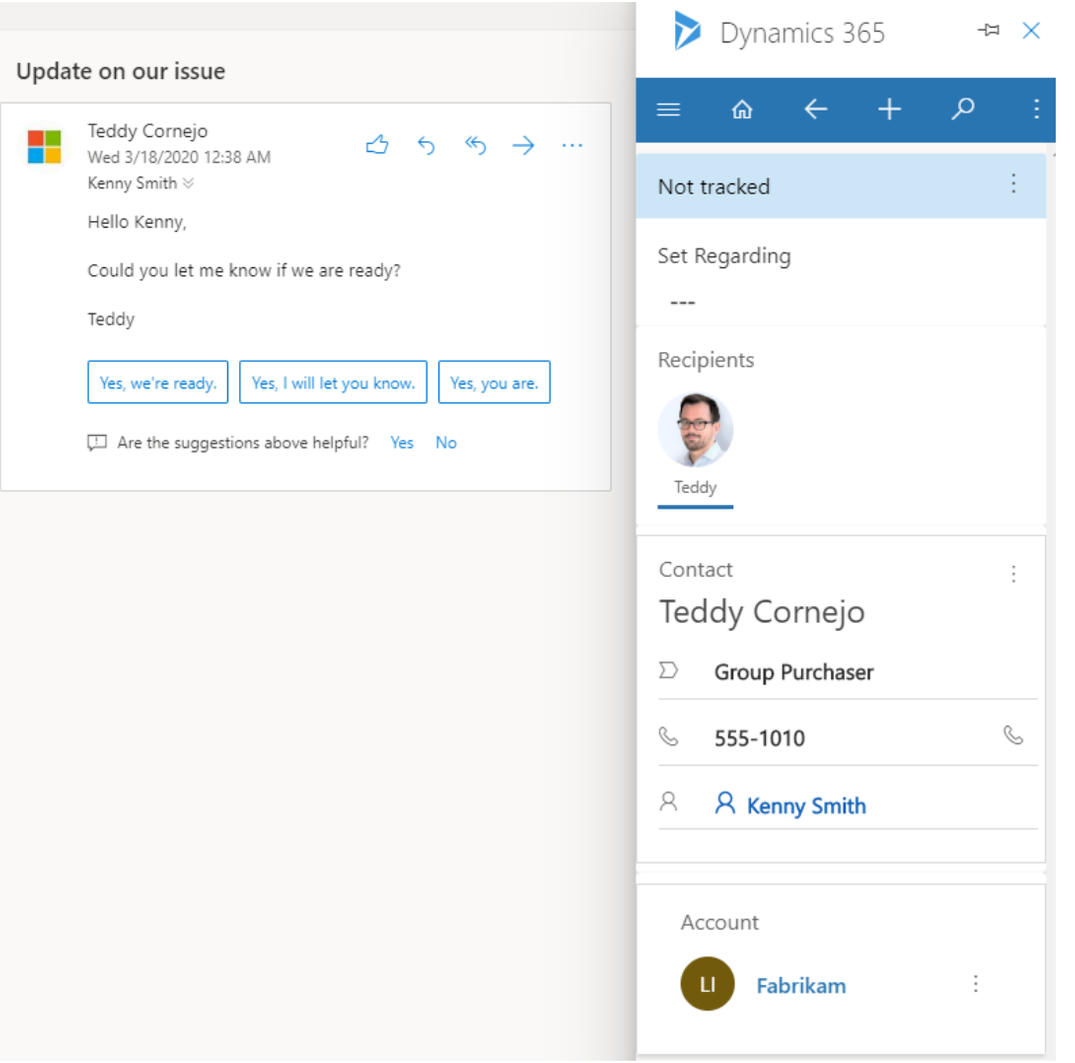
Manager

Delegate: Assistant

Another example:

Employee A (On Holiday)

Delegate: Employee B (Helping out)

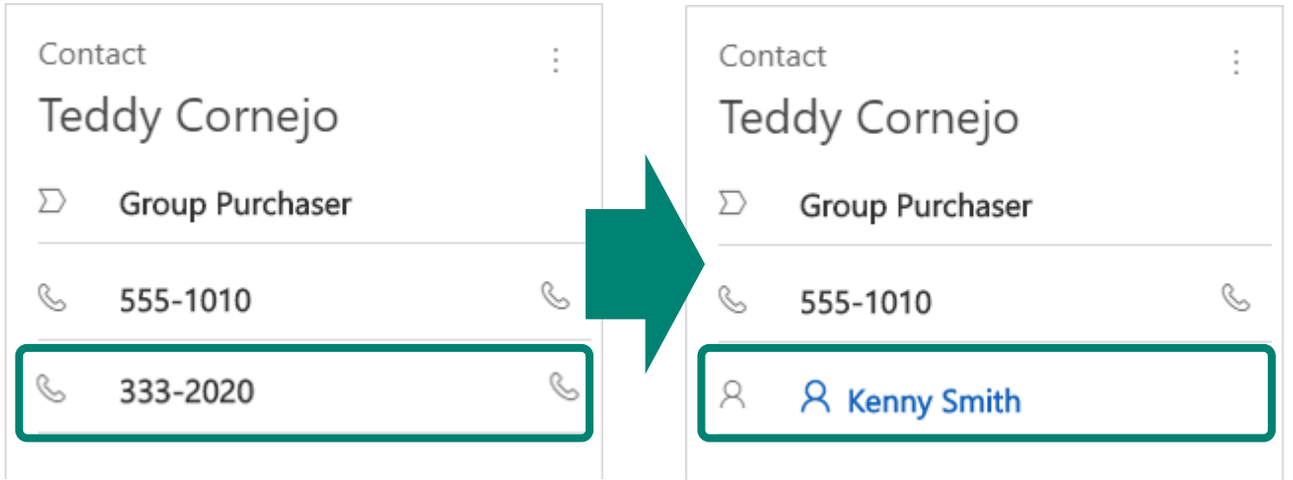


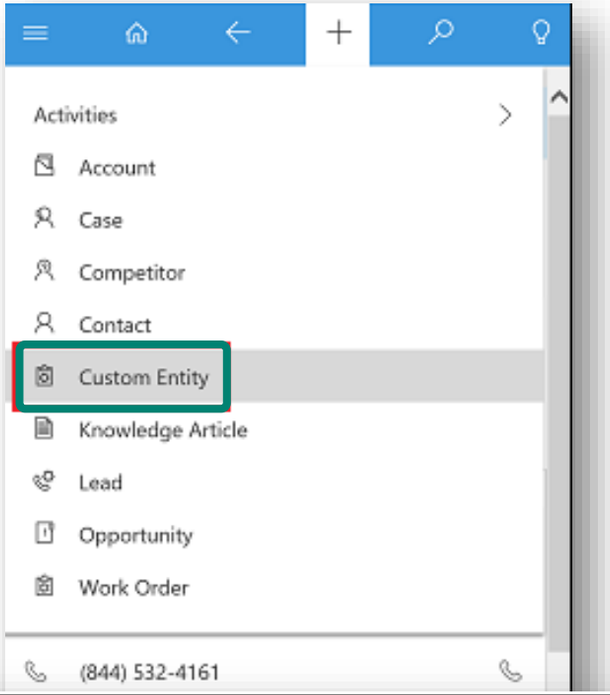
https://docs.microsoft.com/dynamics365/outlook-app/enable-delegate-access

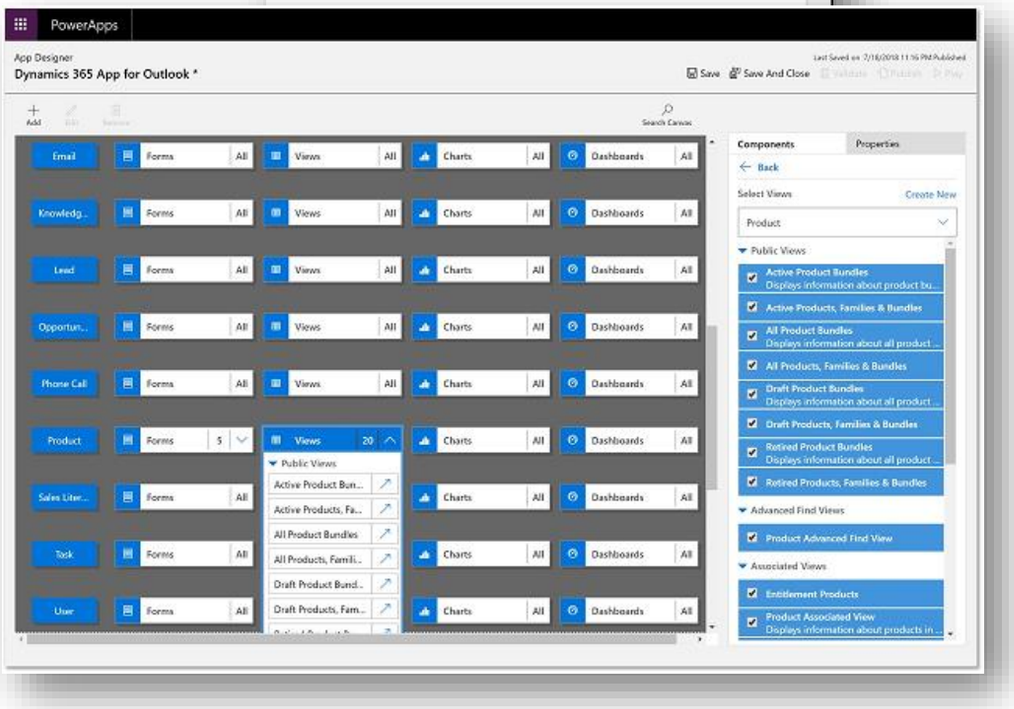
Customize Dynamics 365 App for Outlook

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





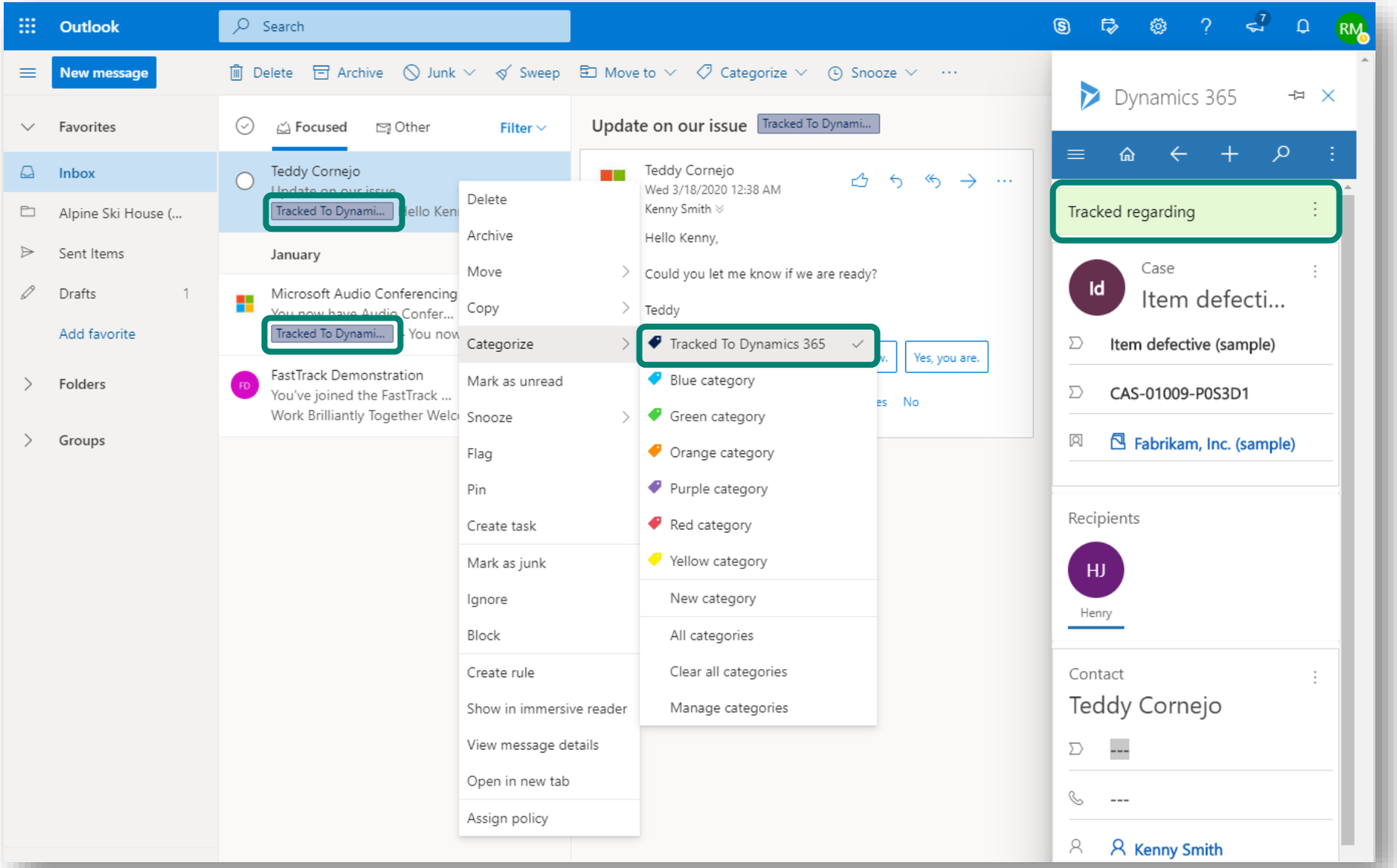


https://docs.microsoft.com/en-us/dynamics365/outlook-app/customizing-the-app

BONUS: Tracking emails to Dynamics 365 using Categories

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

- ✓ Email
- ✓ Appointment
- ✓ Task

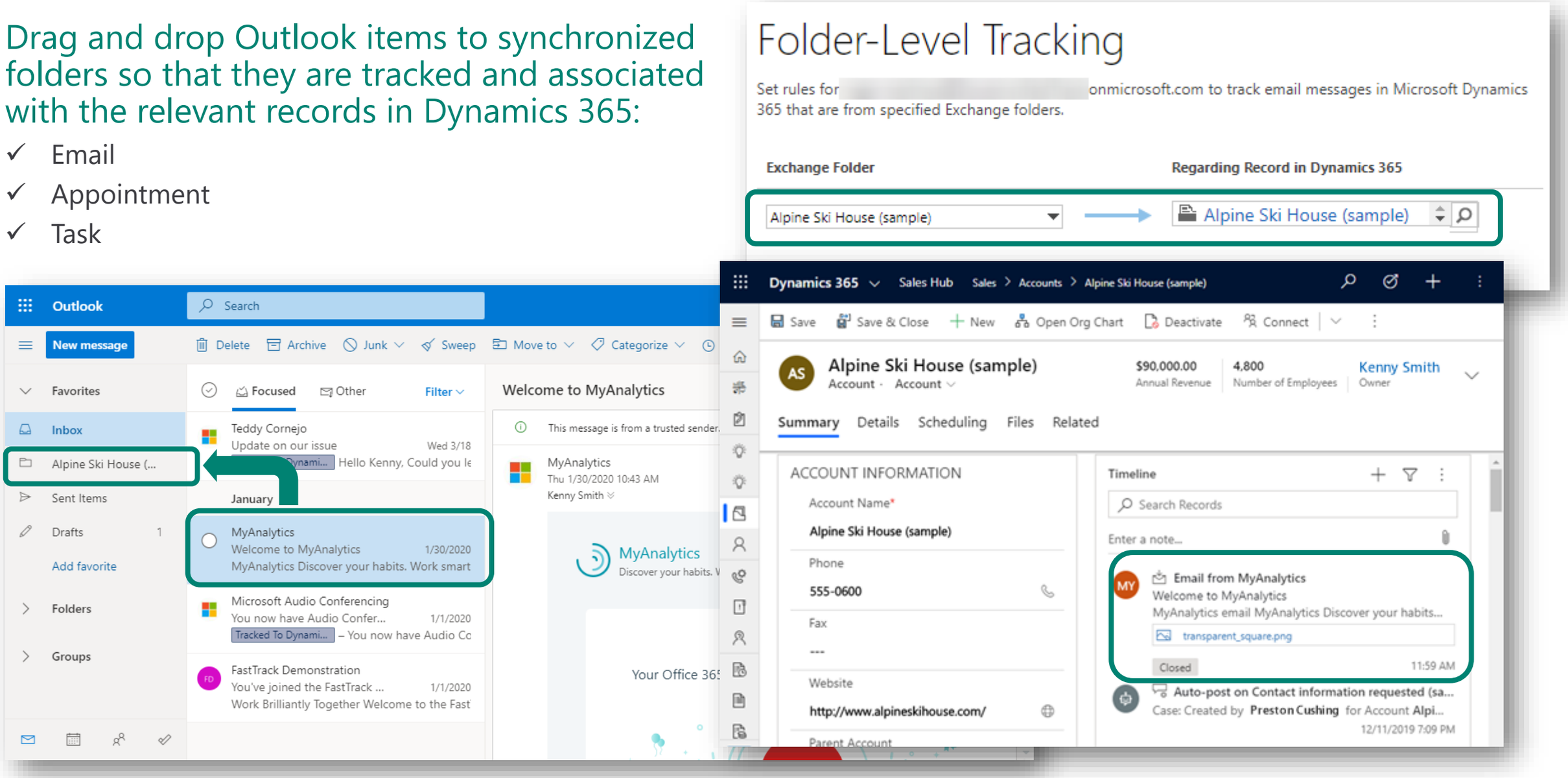


https://docs.microsoft.com/power-platform/admin/use-outlook-category-track-appointments-emails

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



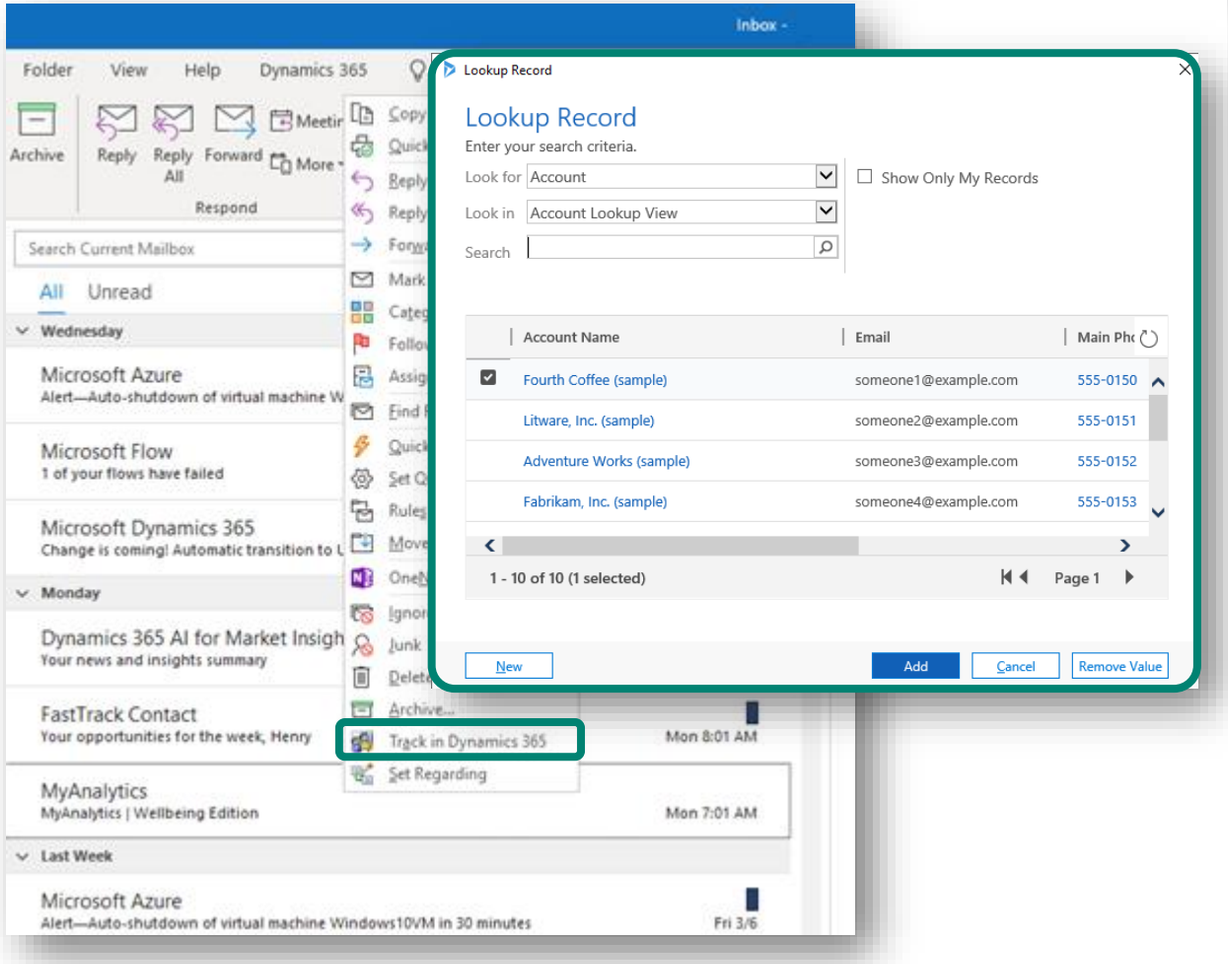
https://docs.microsoft.com/power-platform/admin/track-outlook-email-by-moving-it-tracked-exchange-folder

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

Compares Experiences: tracking items

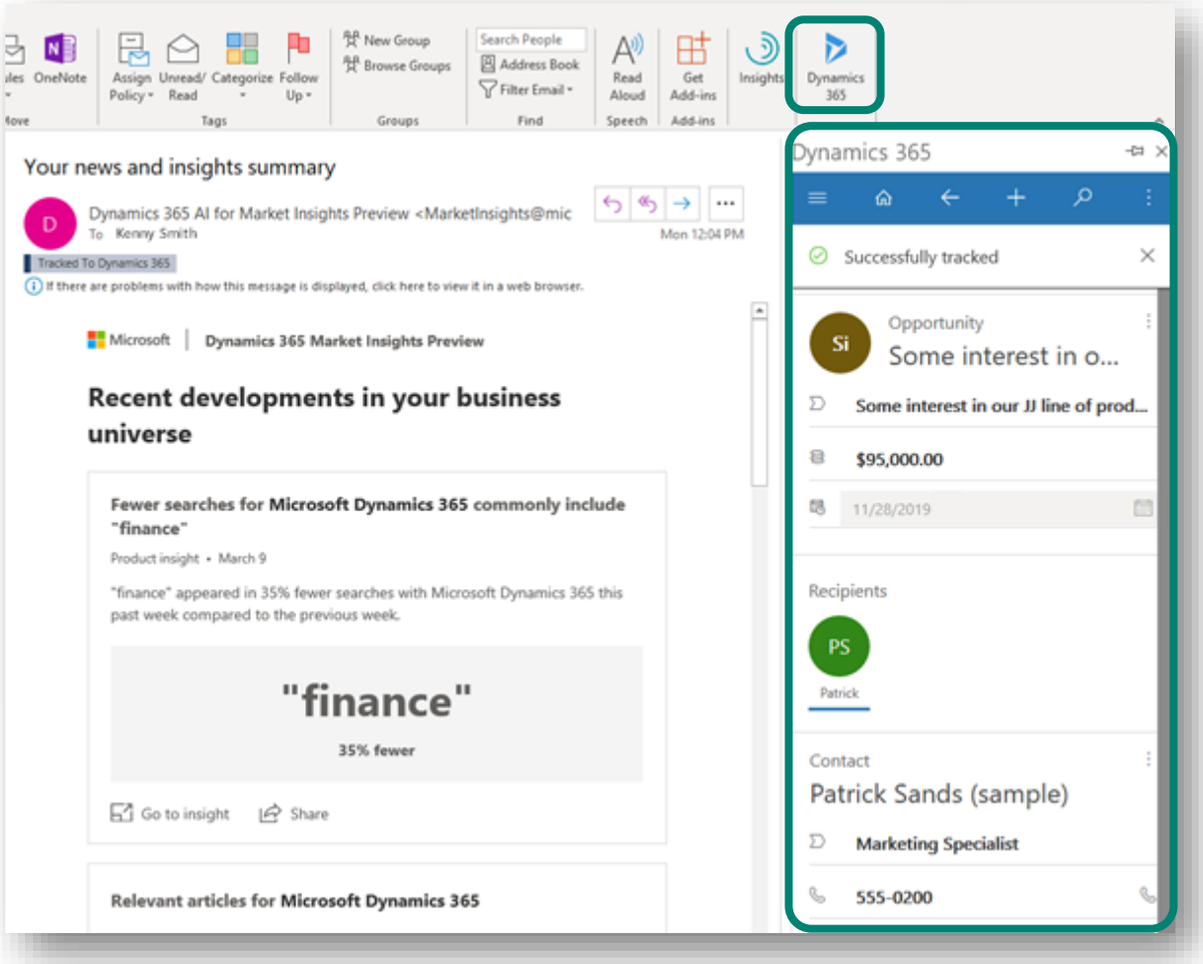
Outlook COM add-in Tracking Email

Heavy but limited integration

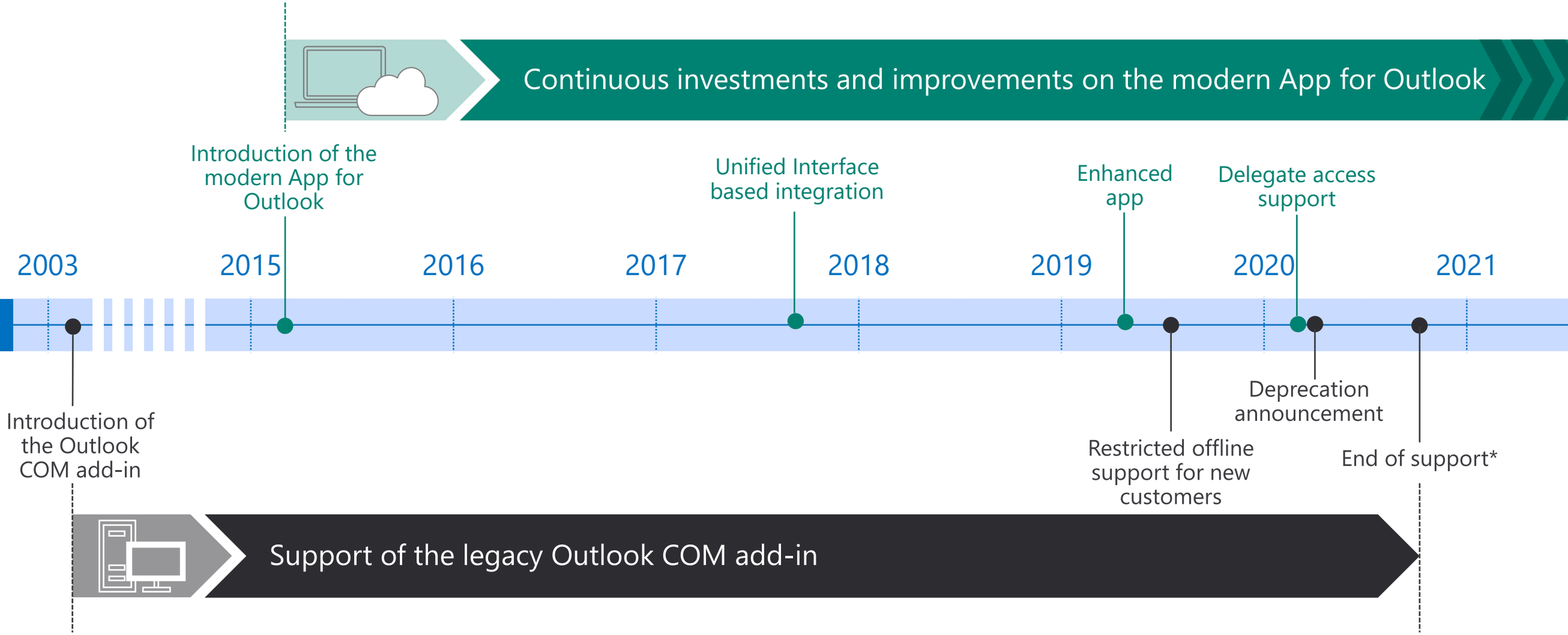


App for Outlook Tracking Email

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
	Dynamics 365 for Outlook (Outlook COM add-in)	**Dynamics 365 App for Outlook**
Technology	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 (deprecated)	Based on Unified Interface
	Depends on SQL Server Compact 4.0 (End of extended support in 2021)	No dependencies on end-of-life features
Performance	Known to affect the client machine's performance	Lightweight integration
Client(s)	Windows + Outlook Desktop	Windows & Mac OS, Outlook Web Access, Smartphone & tablet (iOS/Android)
Deployment	Client installation	Centralized deployment and distribution
	Expensive to deploy and support	Easy deployment and delivery
Security	Full access in client machine/native code	Sandboxed, access through standard Office.js API

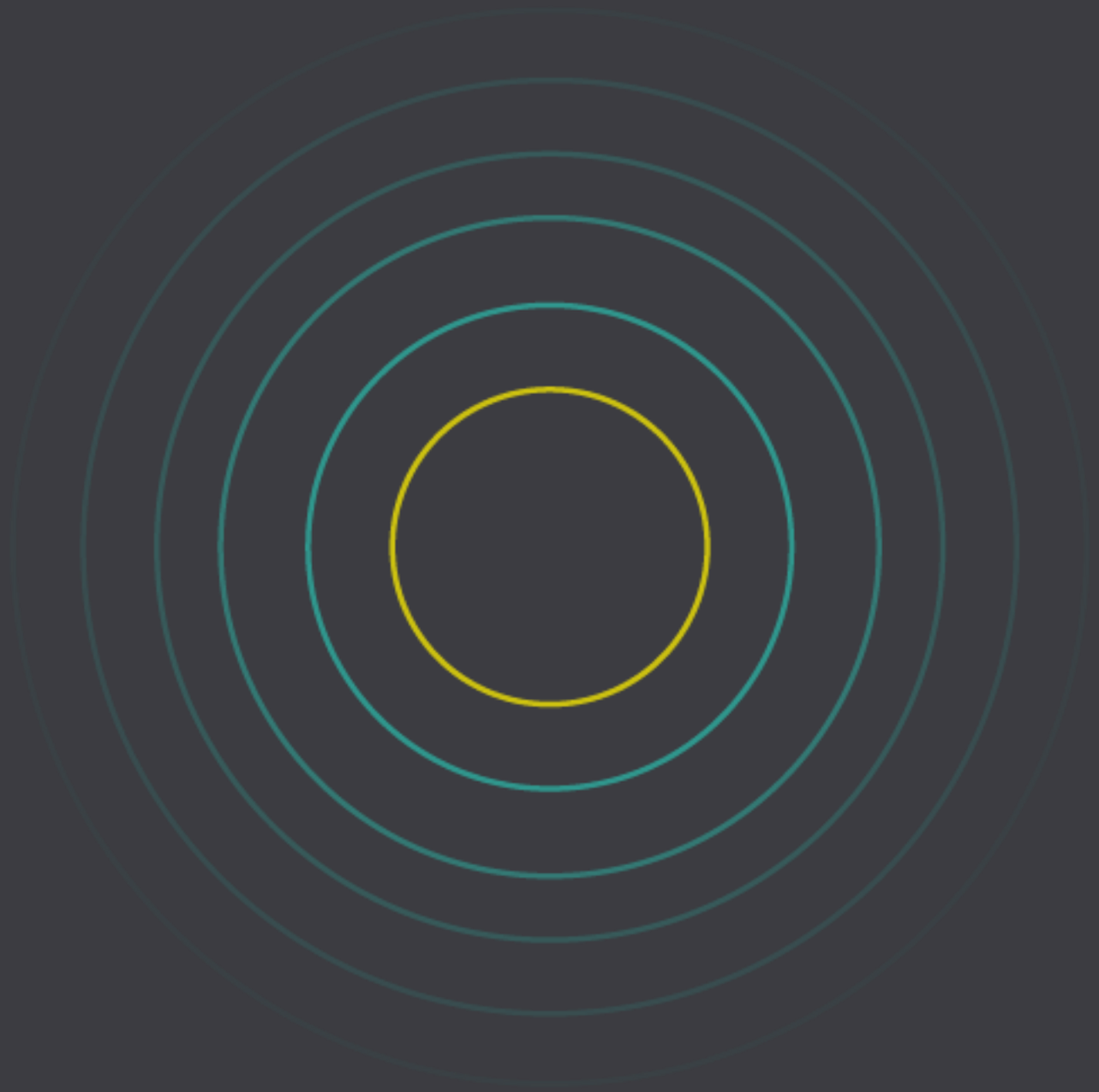
New Improved Online Solution Available

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	✓	✓
	Use custom forms and business logic	✓	✓
Dependent features	Create Word mail-merge documents (deprecated)	✓	💡
	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

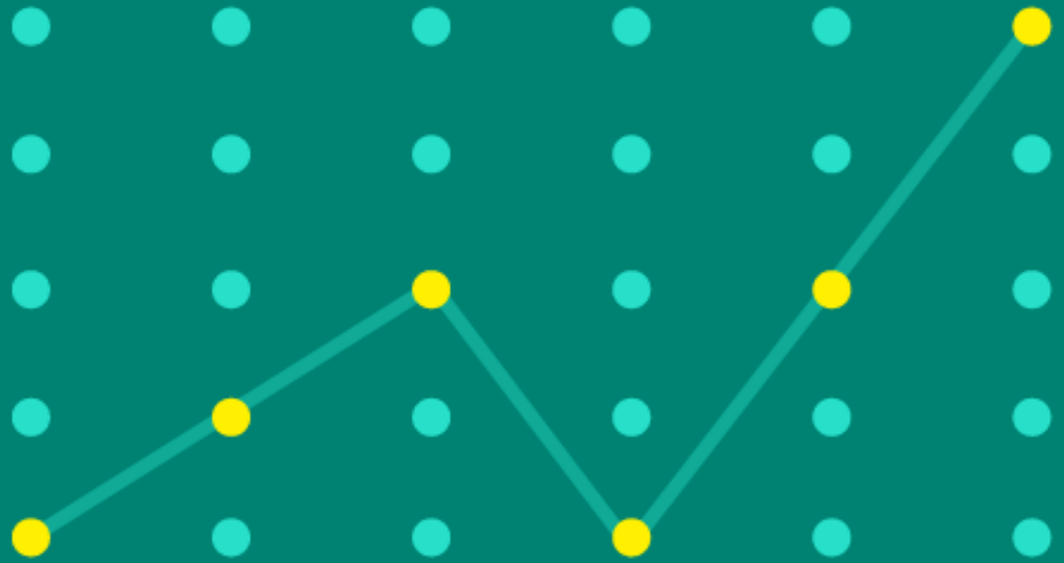
Benefits
- Dynamics 365 App for Outlook on Dynamics 365 Customer Engagement (on-premise) v9 already uses Unified Interface. As there is a need to move to Unified Interface during an on-premise to online migration, this reduces the efforts to maintain customizations for legacy web client and Unified Interface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

Email Server	• **Exchange Server 2013** CU 14 or greater • **Exchange Server 2016** • **Exchange Online**
Email Client	• **Outlook 2019** • **Outlook 2016 (C2R)** version 16.0.93330.2073 or higher (on Windows 7 or higher client OS with IE 11 installed) *This is the minimum version supported for delegate access.* • **Outlook 2016 (MSI)** version 16.0.4266.1001 or higher (on Windows 7 or higher client OS with IE 11 installed) • **Outlook 2013 (MSI)** version 15.0.5023.1000 or higher (on Windows 7 or higher client OS with IE 11 installed) *Support for 2013 versions of Office 365 ProPlus ended February 28, 2017* • **Outlook for MAC** • **Outlook for iOS** (with Exchange Online, on Apple iPhone 6S or higher, running iOS version 8 or higher) • **Outlook for Android** (with Exchange Online, on Android phones running Android 4.4,5.0,6.0,or 7.0)
Browser (Outlook Web Access)	• **Microsoft Edge** (with Exchange on premise 2016 or higher and Exchange Online) • **Internet Explorer 11** (with Exchange on premise 2016 or higher and Exchange Online) • **Google Chrome** • **Mozilla Firefox**

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

Assess your technical landscape

Supported configurations with Microsoft Exchange

Dynamics 365 Customer Engagement apps (Online)	⟷	**Exchange Online**
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
Dynamics 365 for Customer Engagement (on-premise) With Internet Facing Deployment	⟷	**Exchange Online**
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

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

Assess your technical landscape

Additional Requirements for consuming Exchange Application “Dynamics 356 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.

https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/deploy/post-installation-configuration-guidelines-dynamics-365
https://docs.microsoft.com/dynamics365/outlook-app/deploy-dynamics-365-app-for-outlook#requirements

Assess your technical landscape

Feature support per client

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

(O)nline: 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

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

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

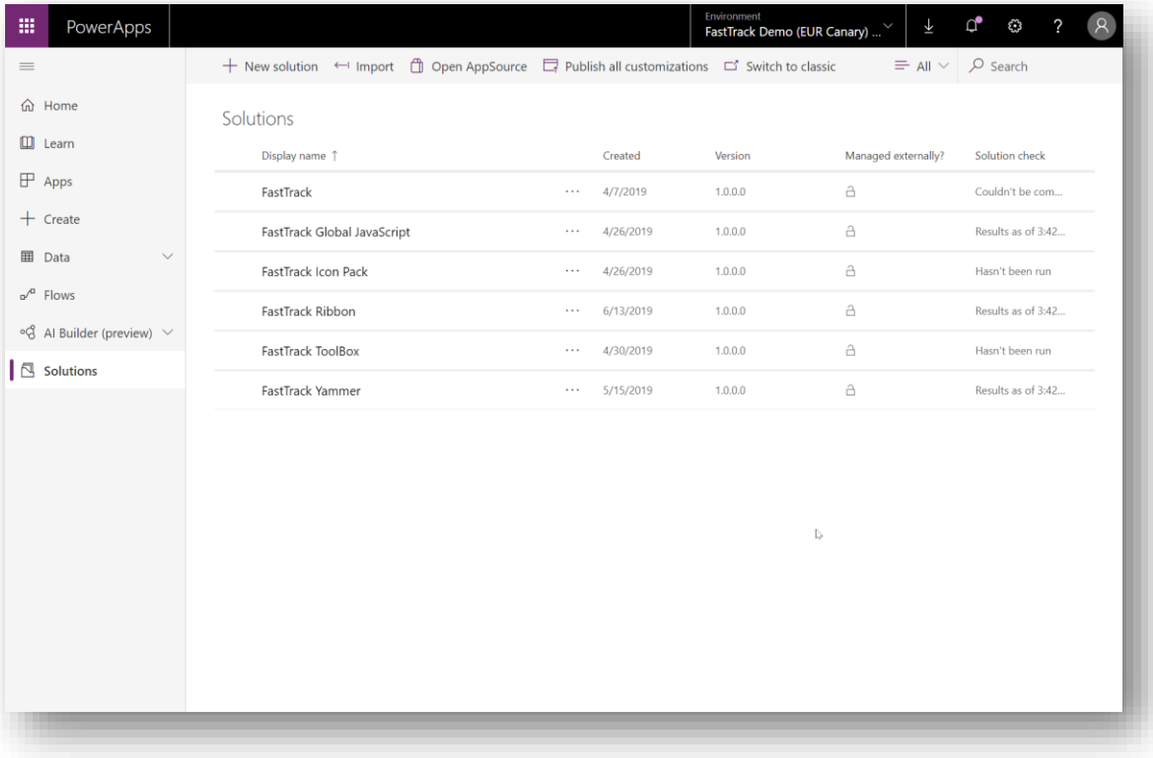
https://docs.microsoft.com/en-us/dynamics365/outlook-app/deploy-dynamics-365-app-for-outlook#requirements

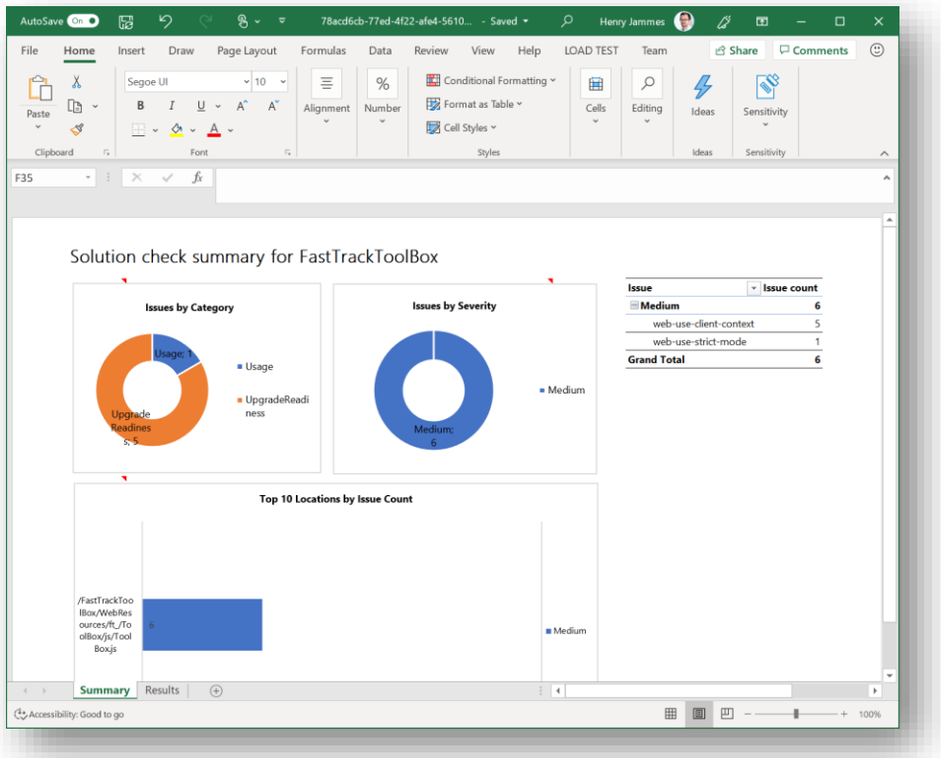
Assess your technical landscape

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

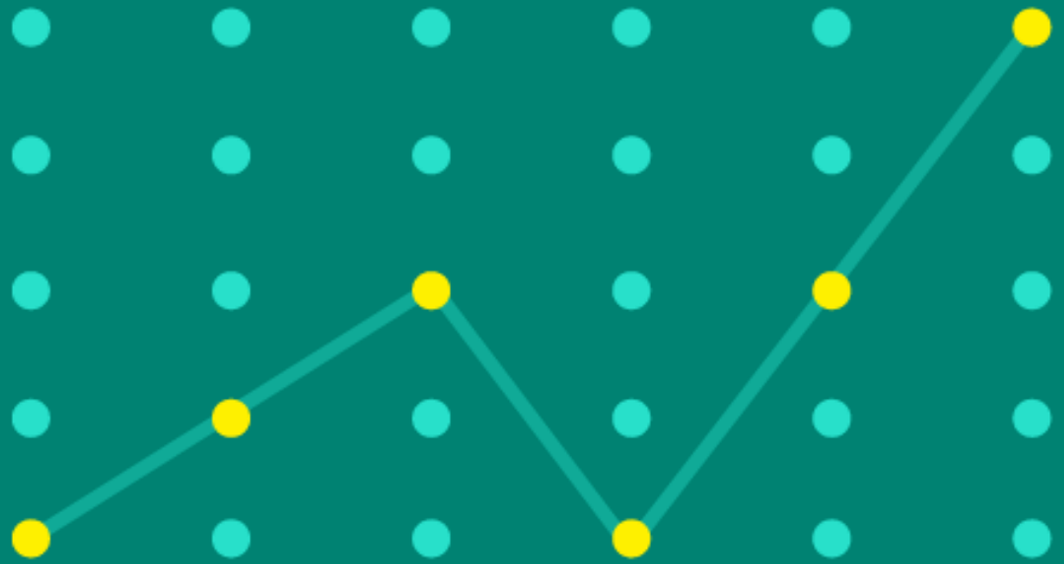
- In make.powerapps.com, select your development environment, and then **go to solutions**.
- **Run the solution checker** on each of your unmanaged solutions to get recommendations and warnings on unsupported and deprecated methods. Among other things, this checks JavaScript web resources.





https://docs.microsoft.com/powerapps/maker/common-data-service/use-powerapps-checker

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

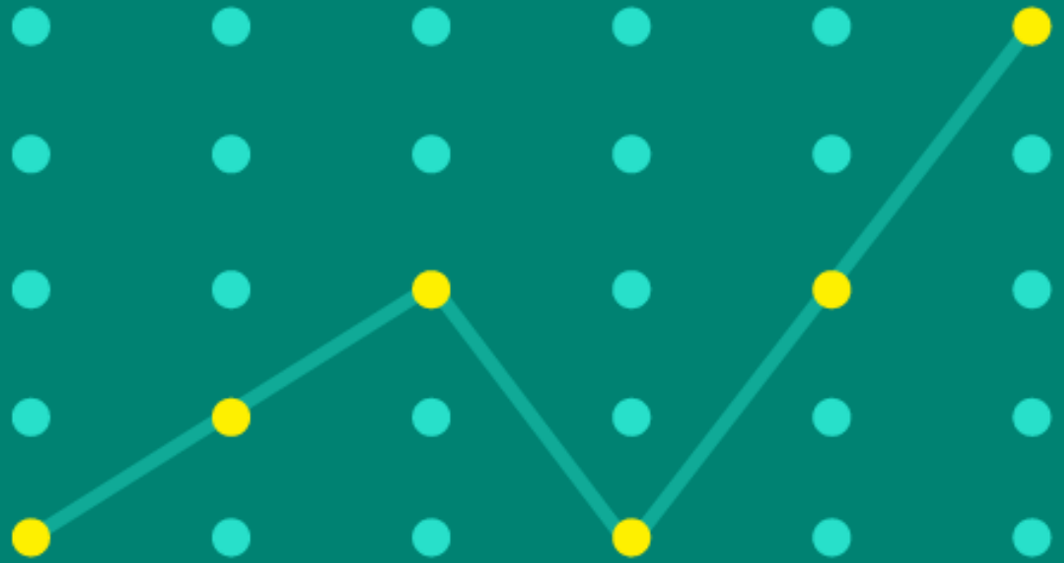
App for Outlook uses various out of the box entities like Account, Contact, Lead, Cases and Opportunities Activities, and others could be visible as you have it configured. You will want to test that all those entities work well for the users via App for Outlook because it uses the Unified Interface.

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

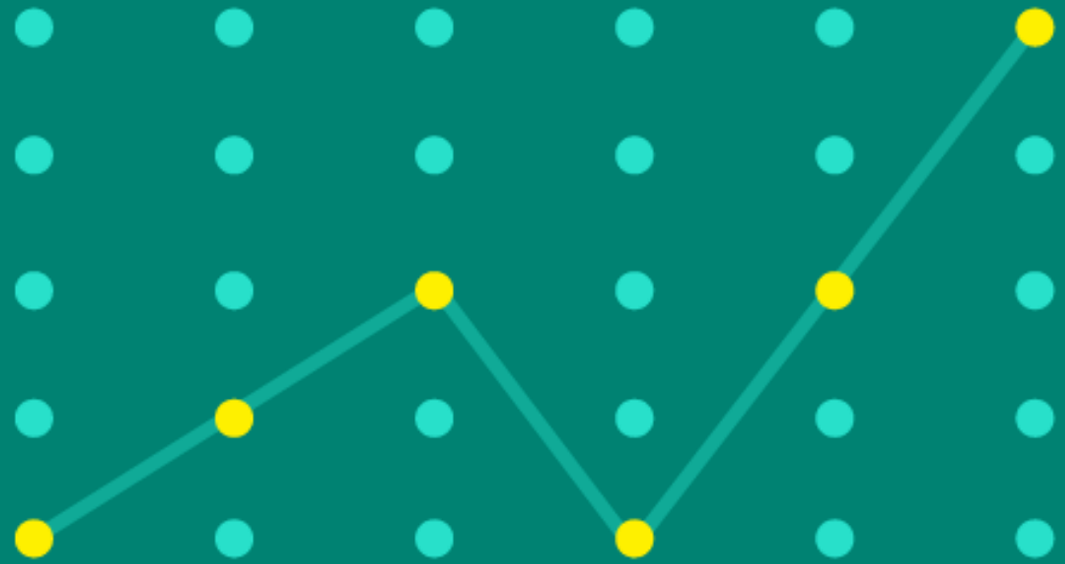


Identify your functional use cases

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 (deprecated)	✔ / ✘ / ?
	Excel Dynamic Worksheet / PivotTable	✔ / ✘ / ?
Others	?	✔ / ✘ / ?

Mapping to the new Dynamics 365 App for Outlook capabilities

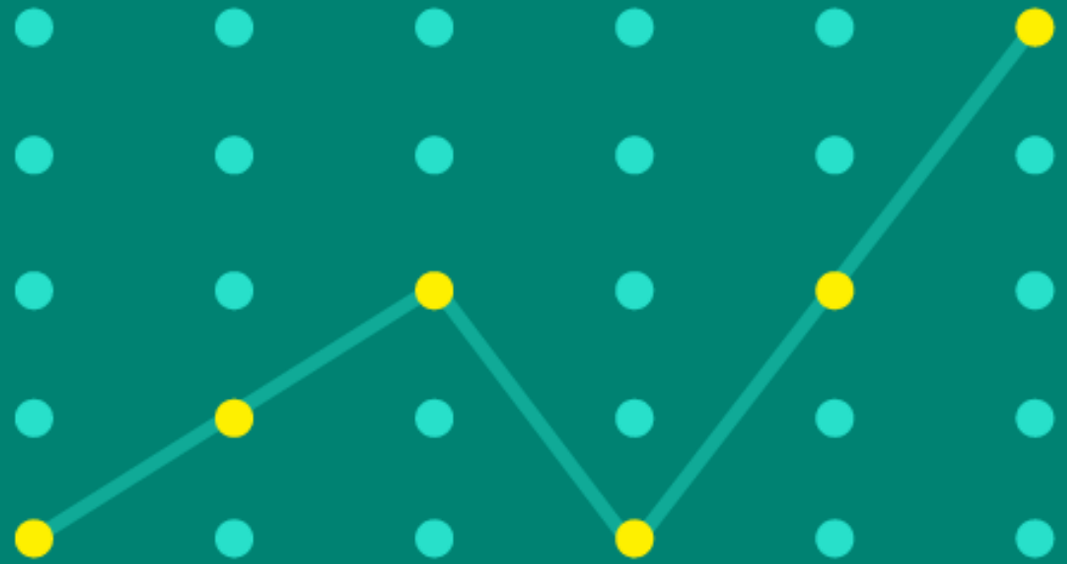


Mapping to the new App for Outlook capabilities

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 (deprecated)	💡	Reports, Document Templates, Power Automate
	Excel Dynamic Worksheet / PivotTable	💡	Power Apps Excel add-in or Excel with Power Query

💡 = Alternative solution available

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 3rd-party providers (ISV)

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

Identify workarounds and new alternatives

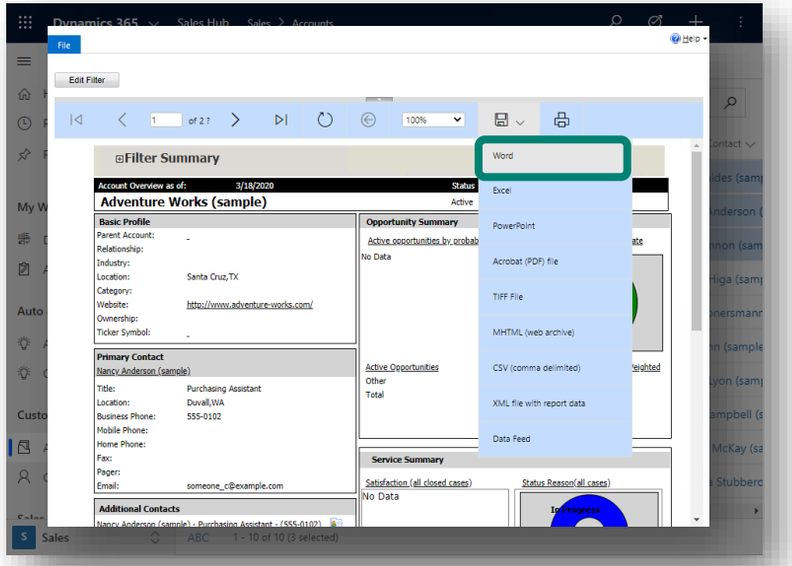
Create Word mail-merge documents

> ⚠ 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

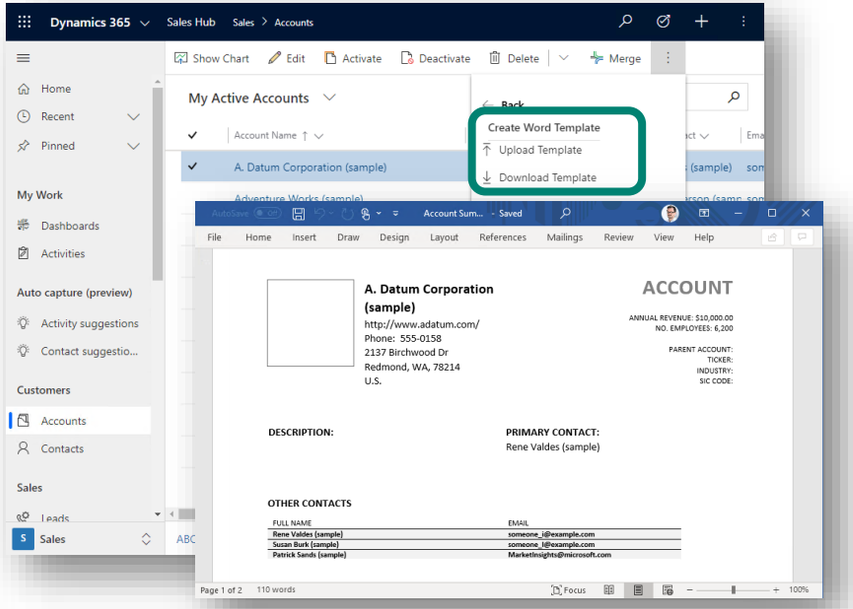
- ✓ Dynamics 365 apps can include reports that render data in a desired layout or format.
- ✓ Reports can be exported as a Word file.
- ✓ Reports can be run against multiple records.
- ✓ Reports are based on SQL Server Reporting Services (SSRS).



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

Document Templates

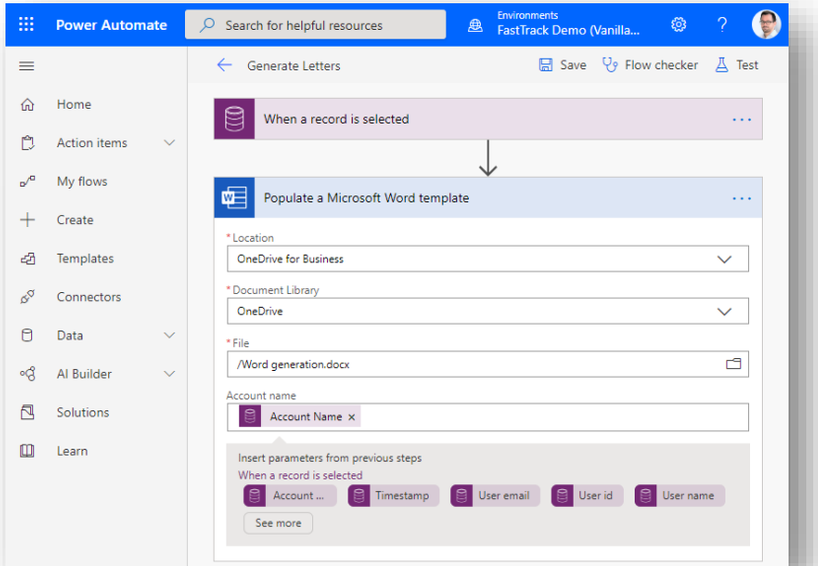
- ✓ You can create and import Word templates into Dynamics 365 apps.
- ✓ With one click, users can generate standardized documents automatically populated with data.
- ✓ Documents can be generated one record at a time.



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.



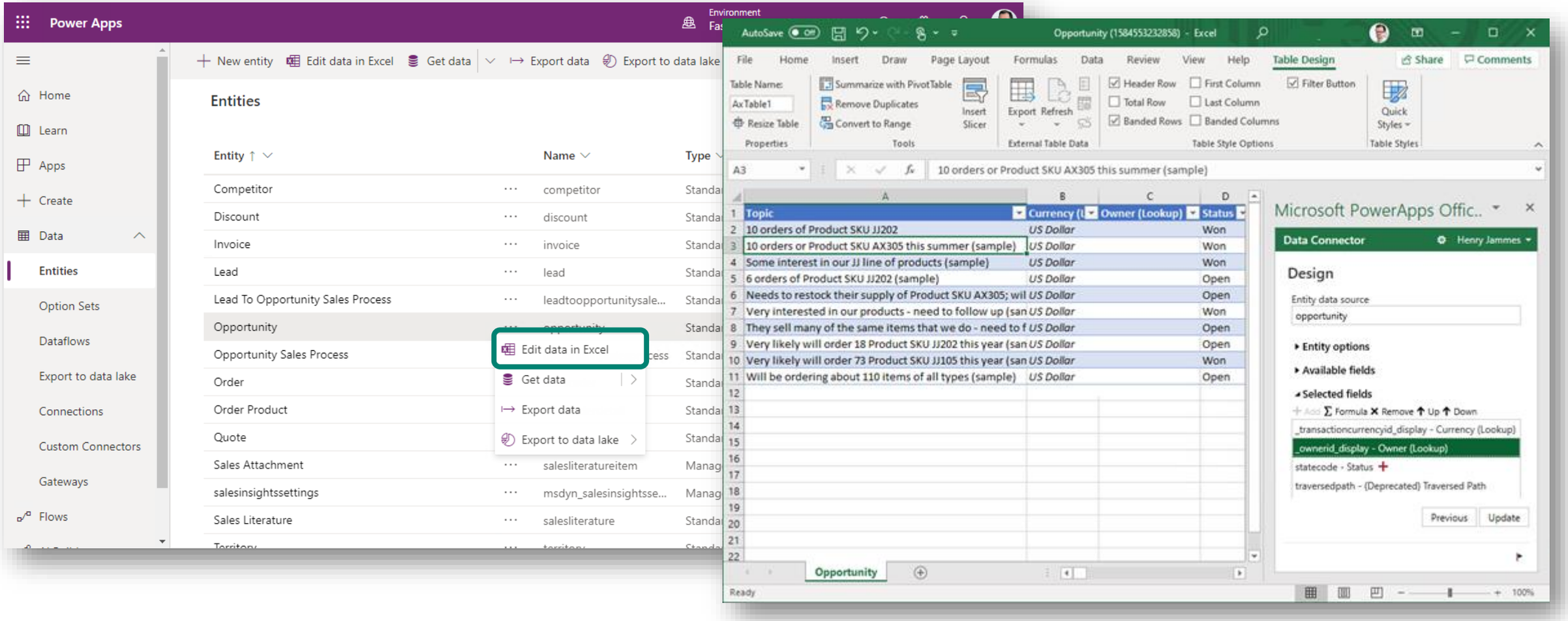
https://flow.microsoft.com/blog/generate-word-documents-in-your-flows/

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.



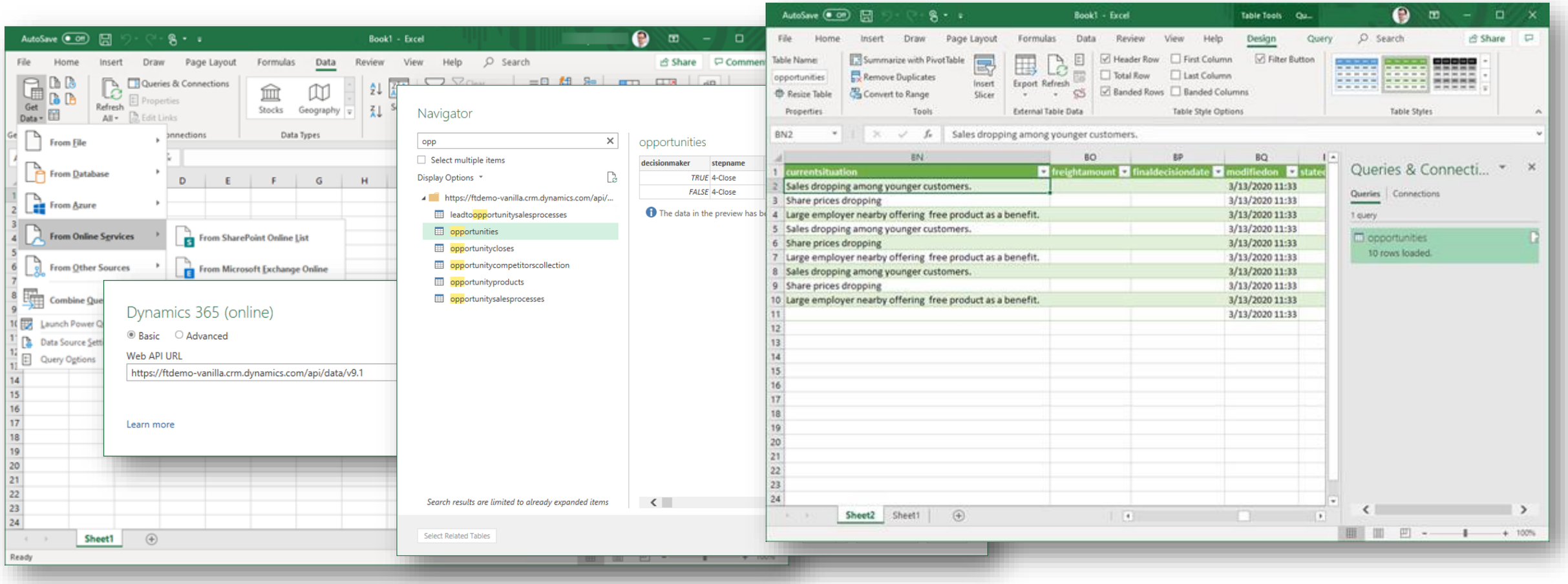
https://docs.microsoft.com/powerapps/maker/common-data-service/data-platform-excel-addin

Identify workarounds and new alternatives

Excel Dynamic Worksheet / PivotTable

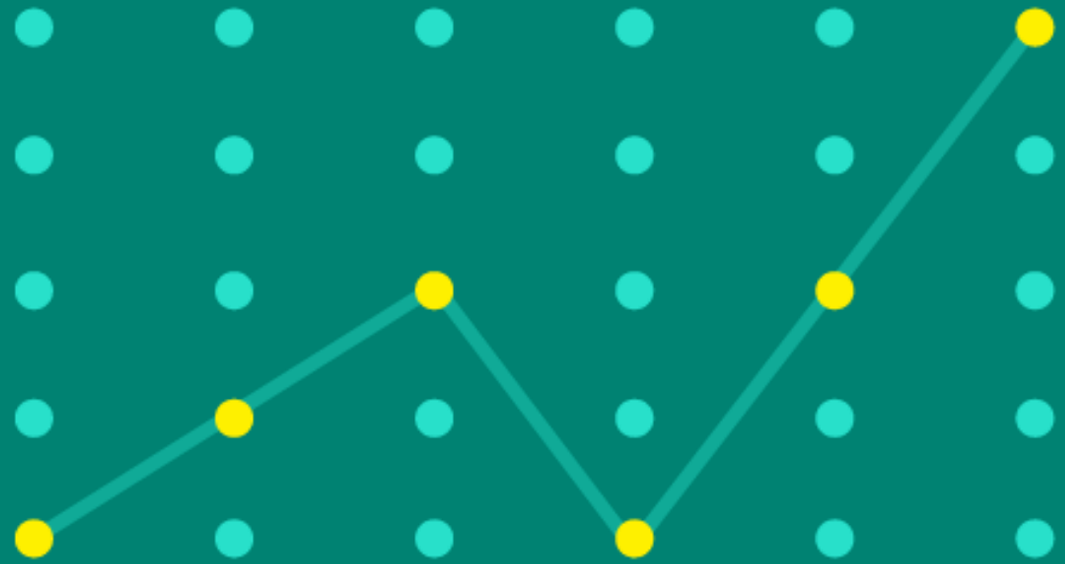
Microsoft Excel with Power Query

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



https://support.office.com/article/import-data-from-external-data-sources-power-query-be4330b3-5356-486c-a168-b68e9e616f5a

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

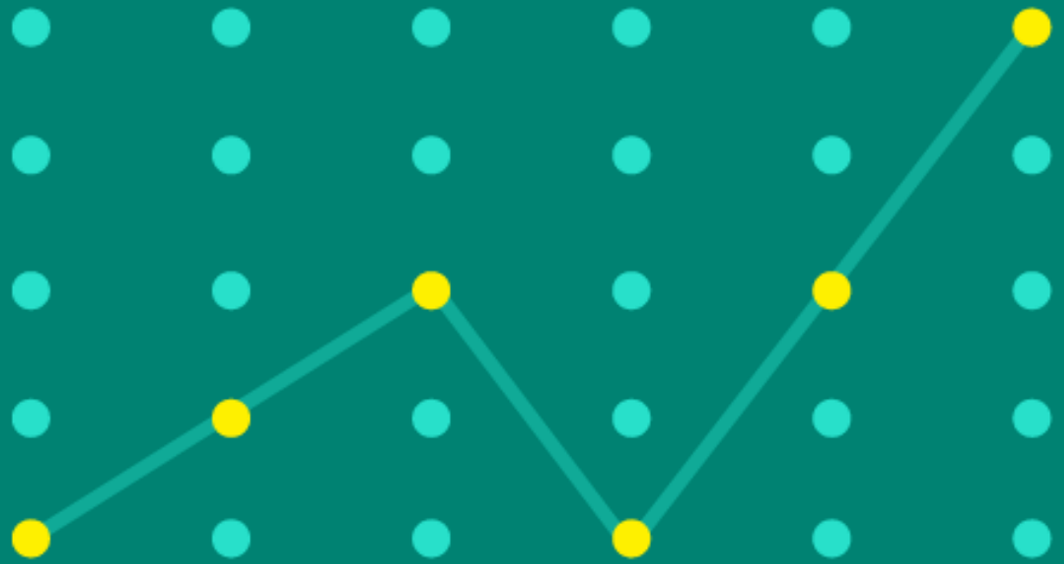
- ✓ Any **business process that needs to be addressed in a different way.**
- ✓ Any potential **regressions.**
- ✓ User **pain points** that could lead to optimizations or specific training.

Identify opportunities

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

Documentation: Deploy Dynamics 365 App for Outlook as well as the “Switch & Deploy” chapter

Perform User Acceptance Testing



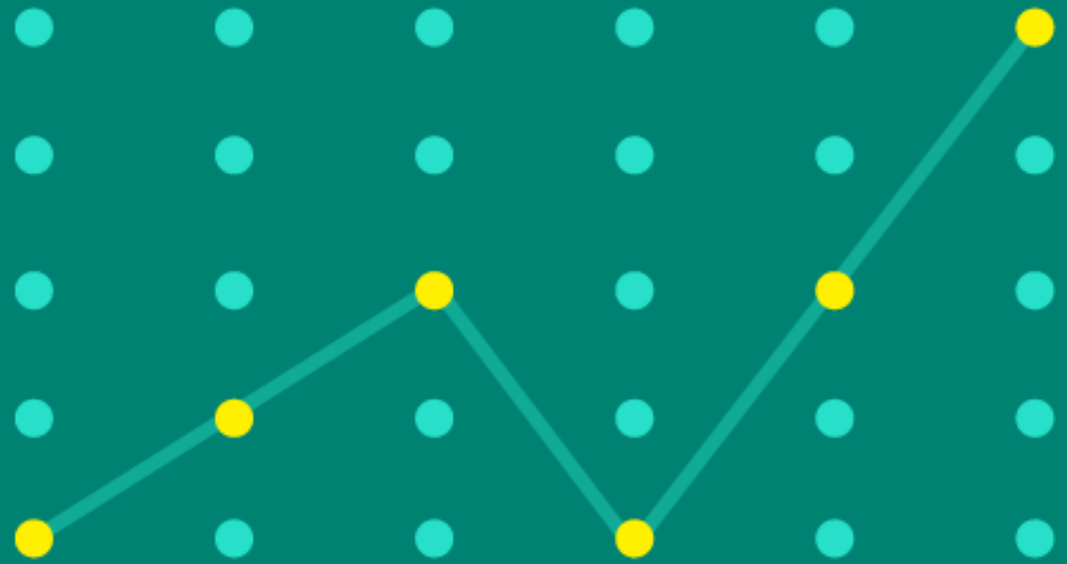
Perform User Acceptance Testing

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

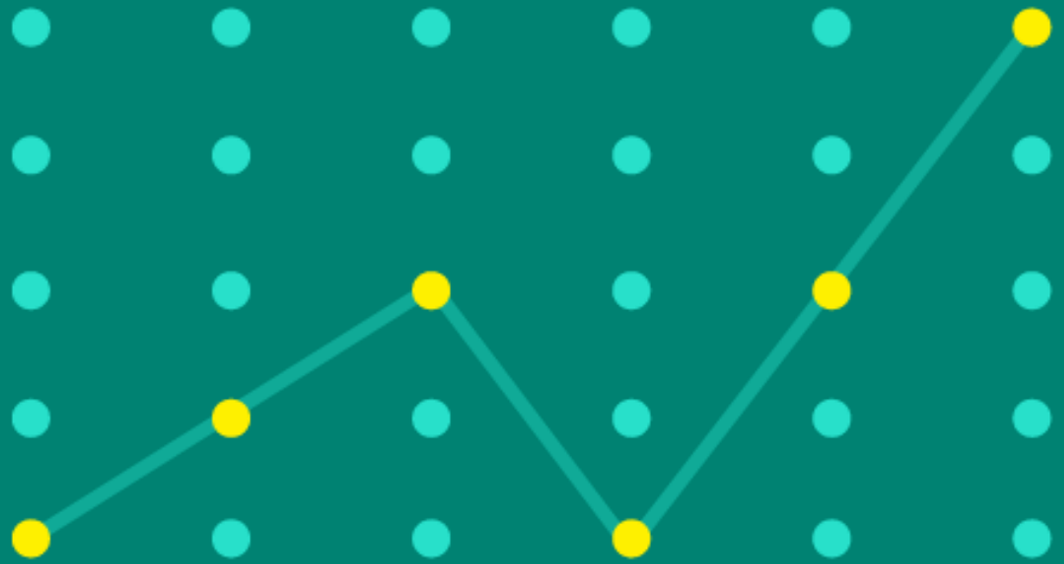
Support users

- 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**

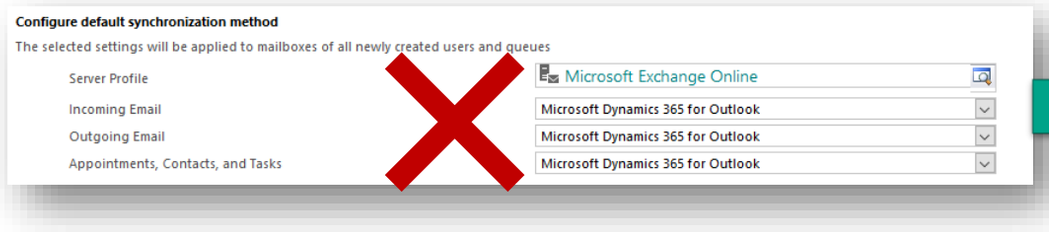
Configure Server-Side Configuration and Dynamics 365 App for Outlook

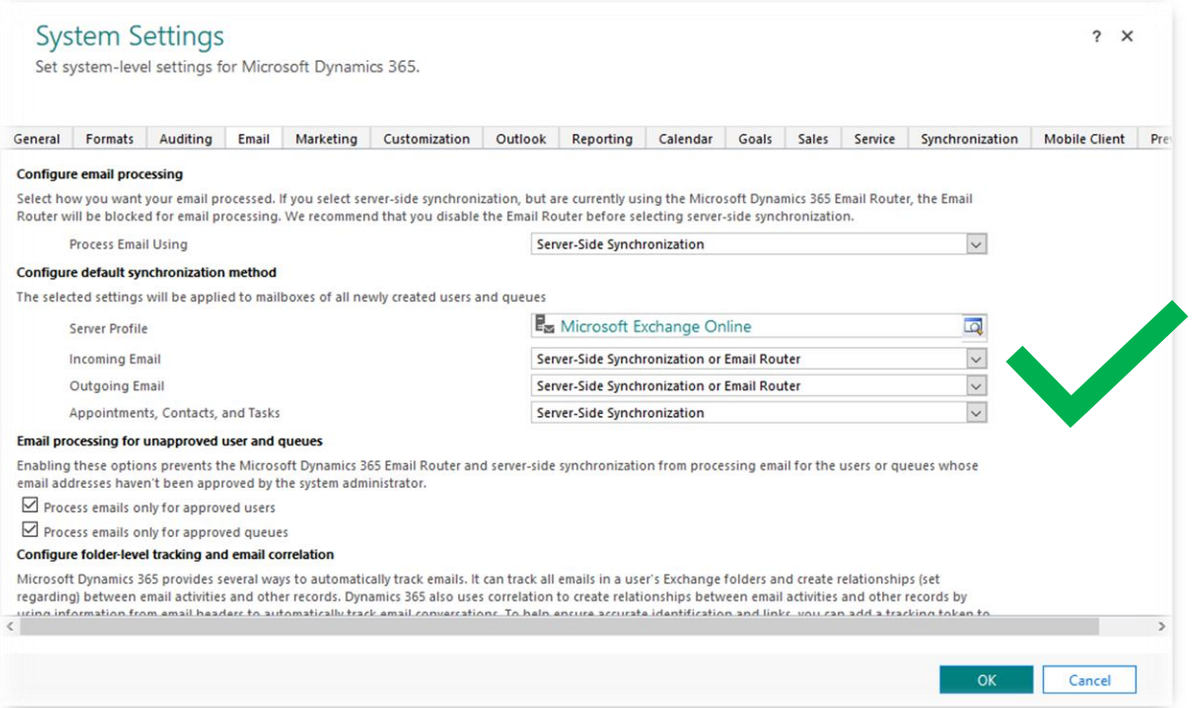
1. Set Server-Side Synchronization as Default Server Profile, replacing Dynamics 365 for Outlook

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**

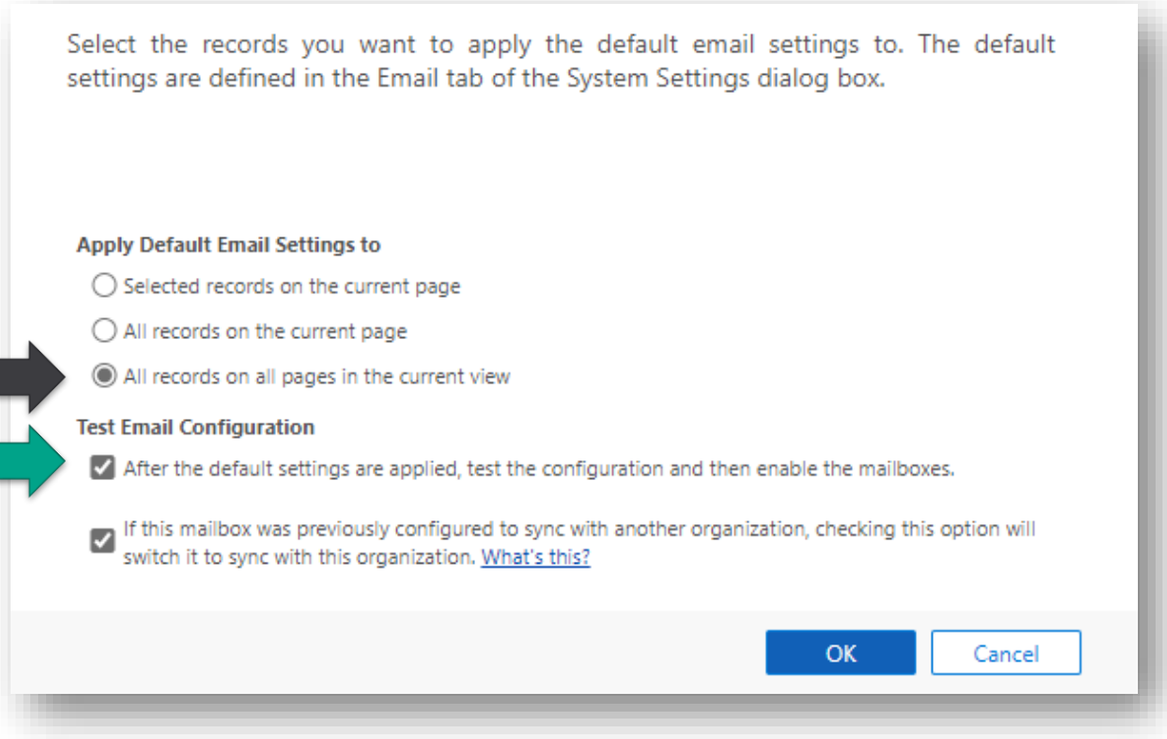
1. In the web app, go to "Advanced Settings"
   Settings > **Email Configuration** > **Mailboxes**.
2. Choose **Active Mailboxes**.
3. Select **Apply Default Email**

   ✓ 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



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

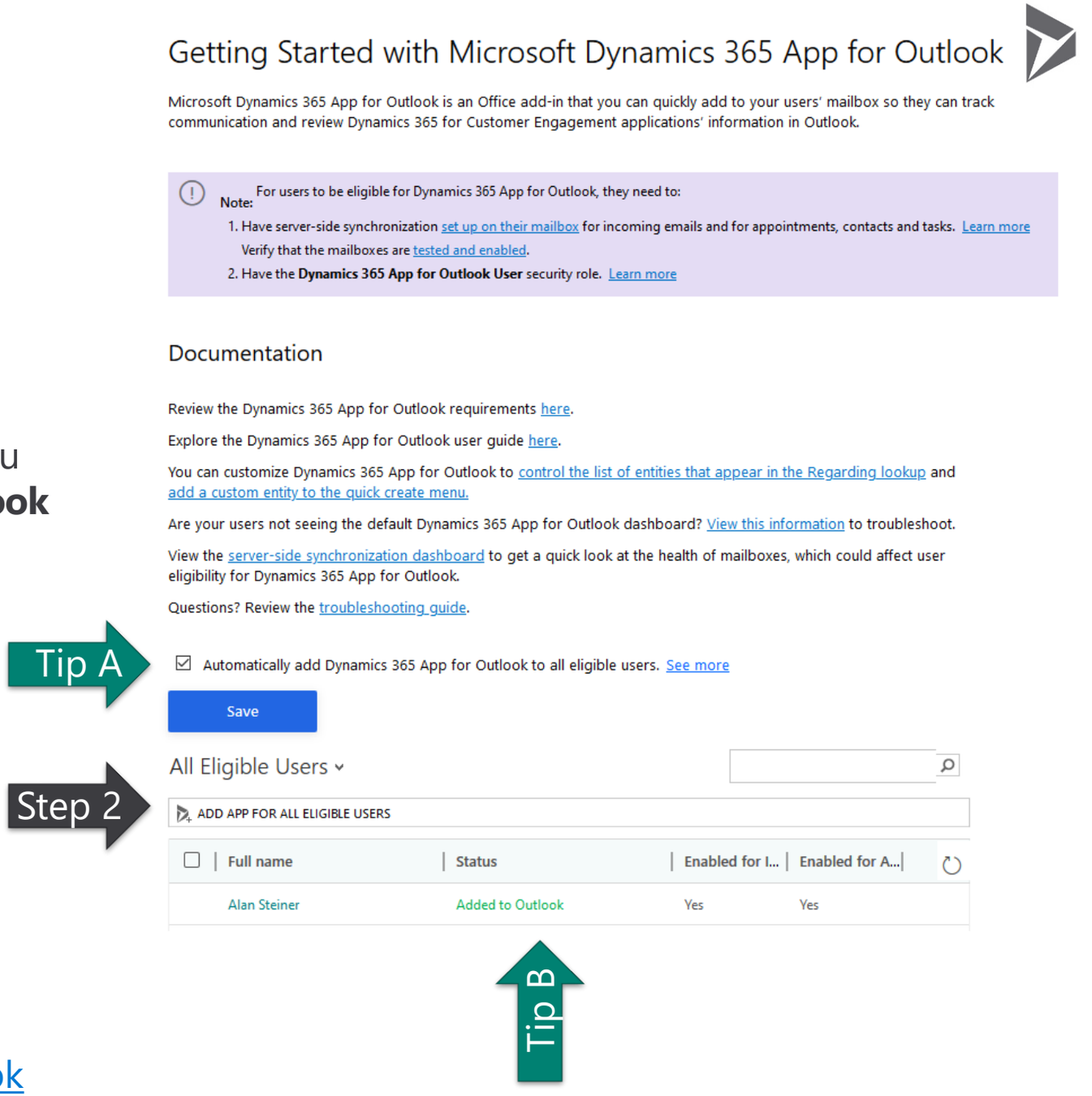
Dynamics 365 Configuration

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]

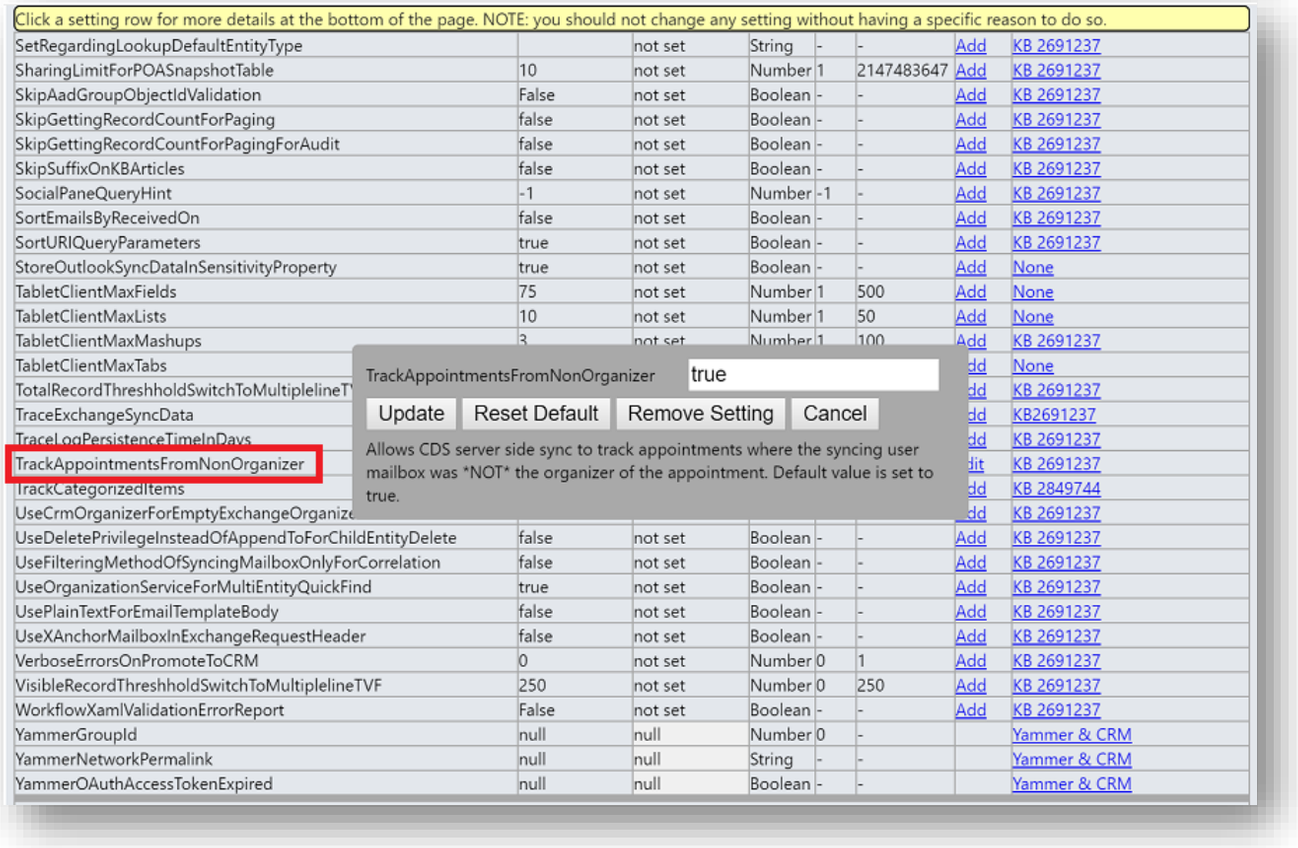
Optional: Setup Delegate Access in App for Outlook

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.

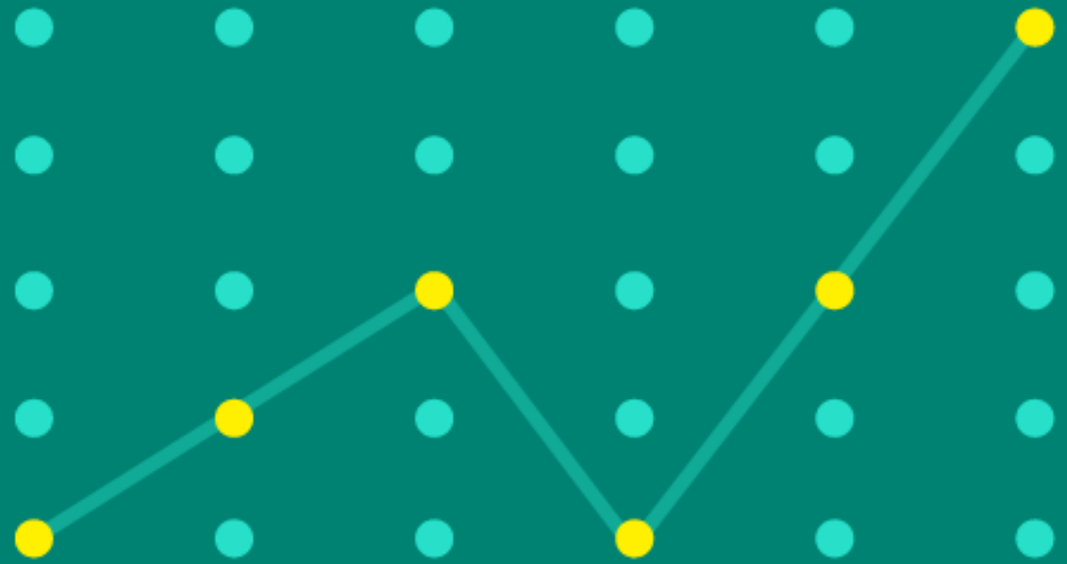
To enable delegate access, you need to enable the OrgDBOrgSetting tool in your environment.

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



https://docs.microsoft.com/dynamics365/outlook-app/enable-delegate-access

Uninstall the Dynamics 365 for Outlook COM add-in



Uninstall the Dynamics 365 for Outlook COM add-in

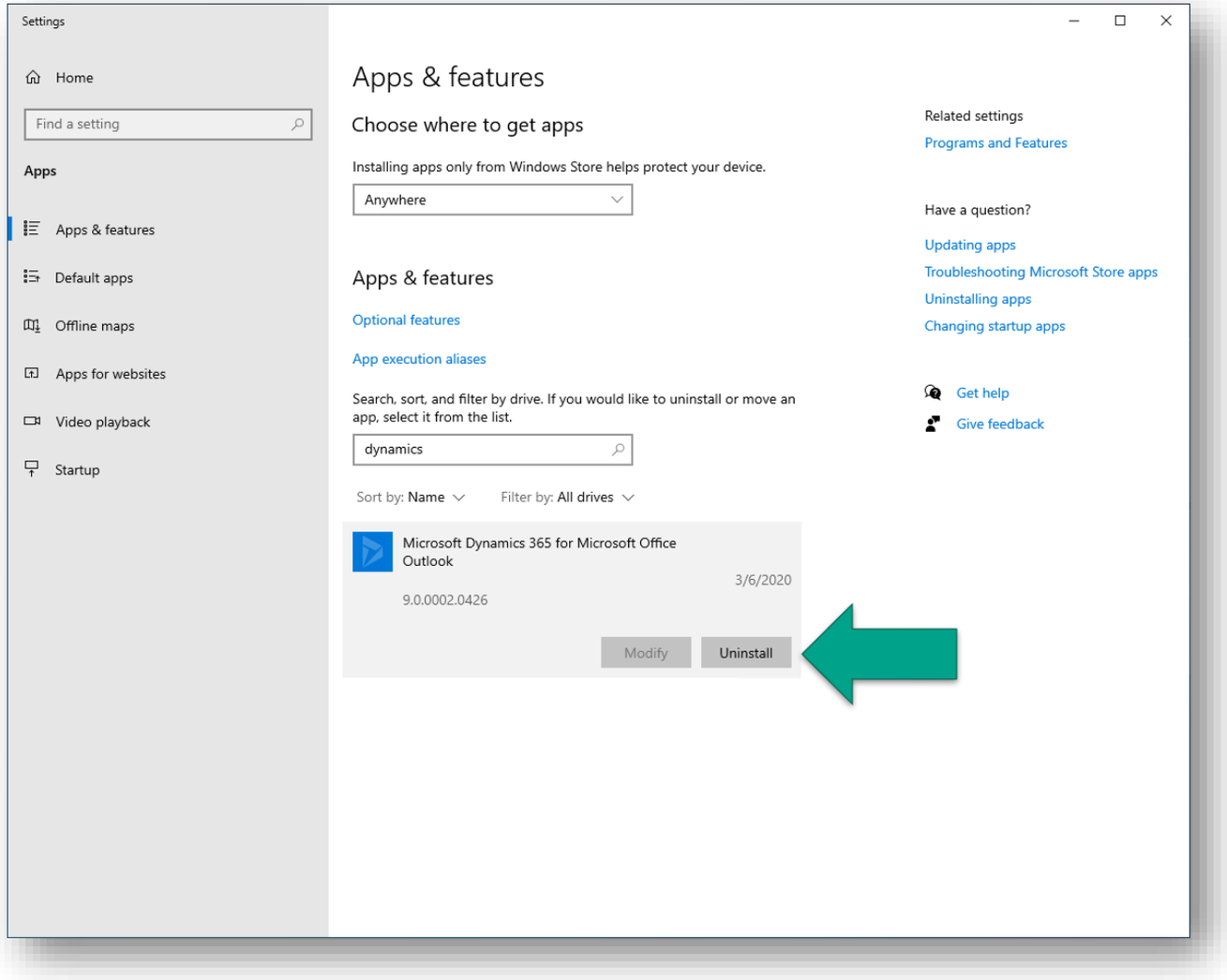
Either from:

From individual client machines

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

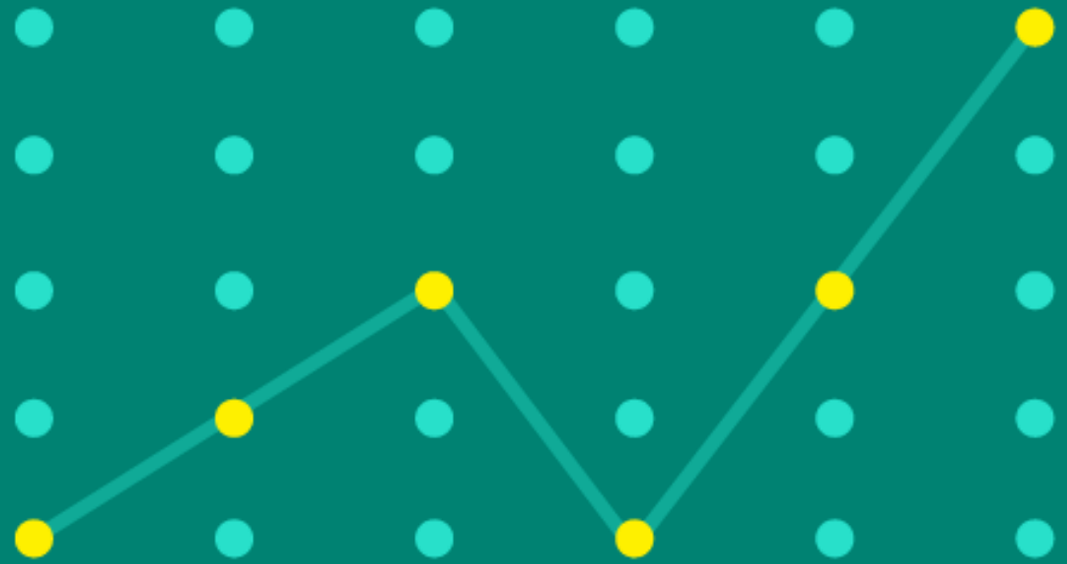
Uninstall for all your users

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



Documentation: Advanced deployment options, and Uninstall or repair

Update your new user onboarding process

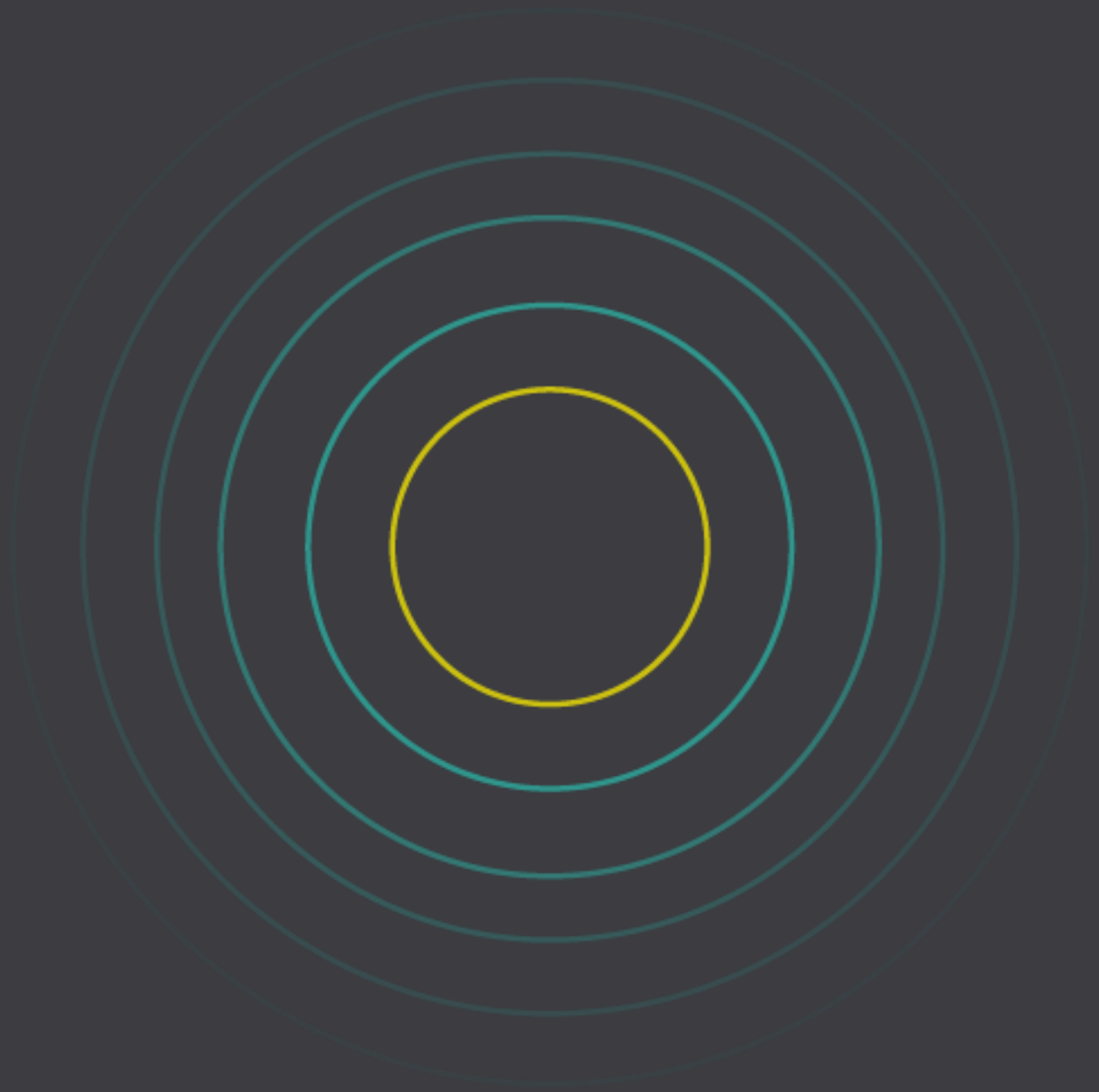


Update your new user onboarding process

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	"We are still on Outlook/Exchange 2010 and/or CRM 2013 and will not be moving to the cloud."	*Outlook and Exchange 2010 are going to be out of support by Oct 2020.*
2	"We are using the Outlook COM add-in for our offline needs on a Windows device and cannot switch to a mobile device. a. With plugin execution in offline mode b. With dependency on offline data store."	*Offline for Windows 10 App is in the future roadmap* *a. With support for expressions that mimic client/server plugins* *b. Build a model-driven or canvas app that works offline*
3	"We need support for a delegate user to be able to go into Outlook and track appointments on users' behalf."	*Delegate support is already available for Exchange Online customers*
4	"We need support for dynamic spreadsheets so users can work with Dynamics 365 views data in a spreadsheet on their machine."	*In Excel, natively connect to Dynamics 365 with Power Query*

Frequently Asked Questions

Common concerns (2/3)

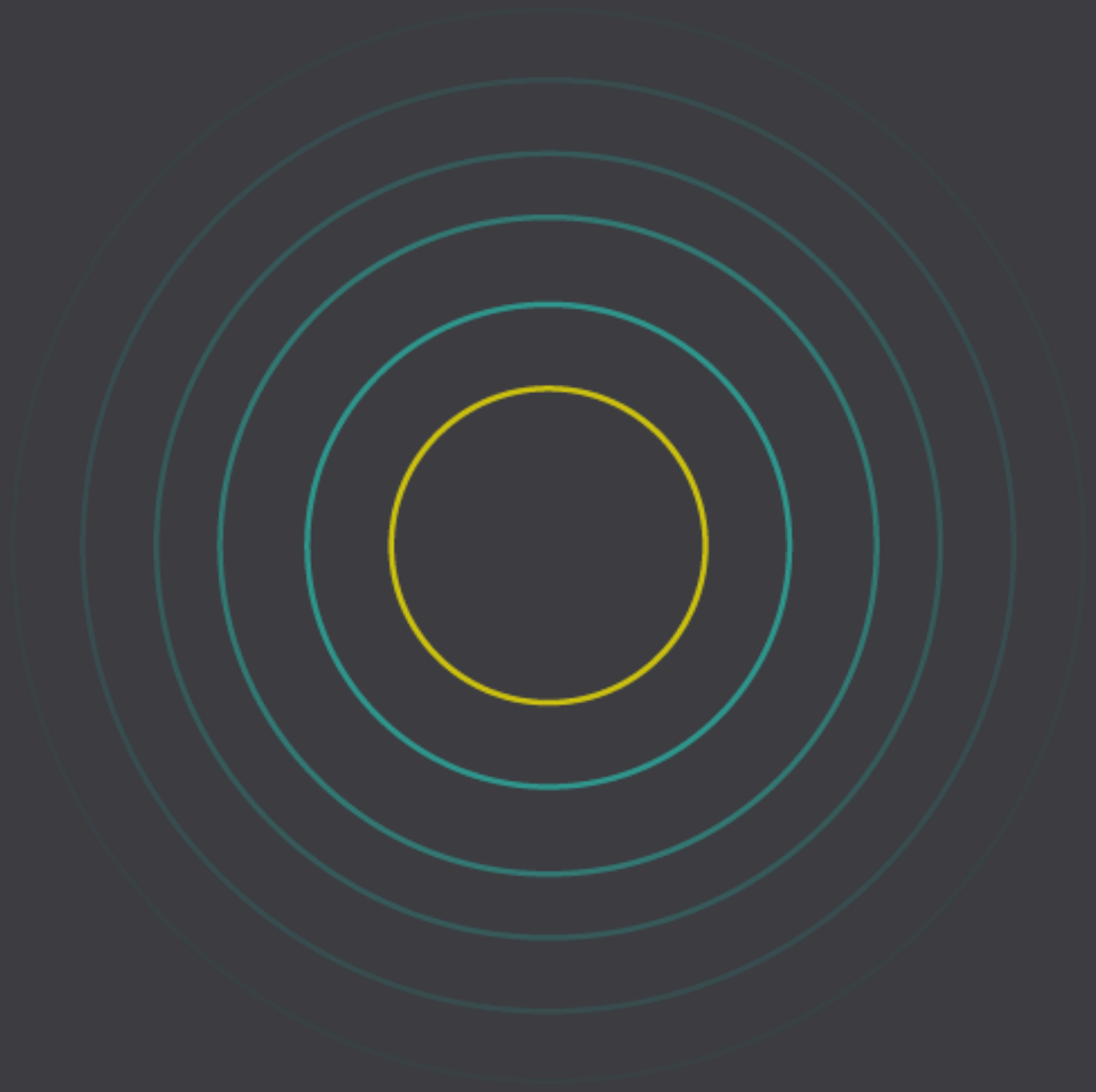
	Concern	Answer
5	"Are there general guidelines to be considered to track sent items?"	*Please refer to that article: https://community.dynamics.com/crm/b/crminthefield/posts/dynamics-365-app-for-outlook-part-4-working-with-emails*
6	"When creating a new Case as the regarding record from a received email,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

Frequently Asked Questions

Common concerns (3/3)

	Concern	Answer
9	"My appointment attendees receive meeting updates when I update my appointment in Dynamics 365, why?"	*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 synchronized fields between Outlook and Dynamics 365 to see what triggers updates in Outlook.* *You can leverage the OrgDBOrgSetting_AllowSaveAsDraftAppointment. 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.*
10	"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?"	*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*
11	"A 3rd-party Outlook add-in disables the Dynamics 365 App for Outlook, what can I do"	*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.*

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

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Thank you!

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