



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



Download the latest version of the Playbook here: aka.ms/OutlookCOMPlaybook

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

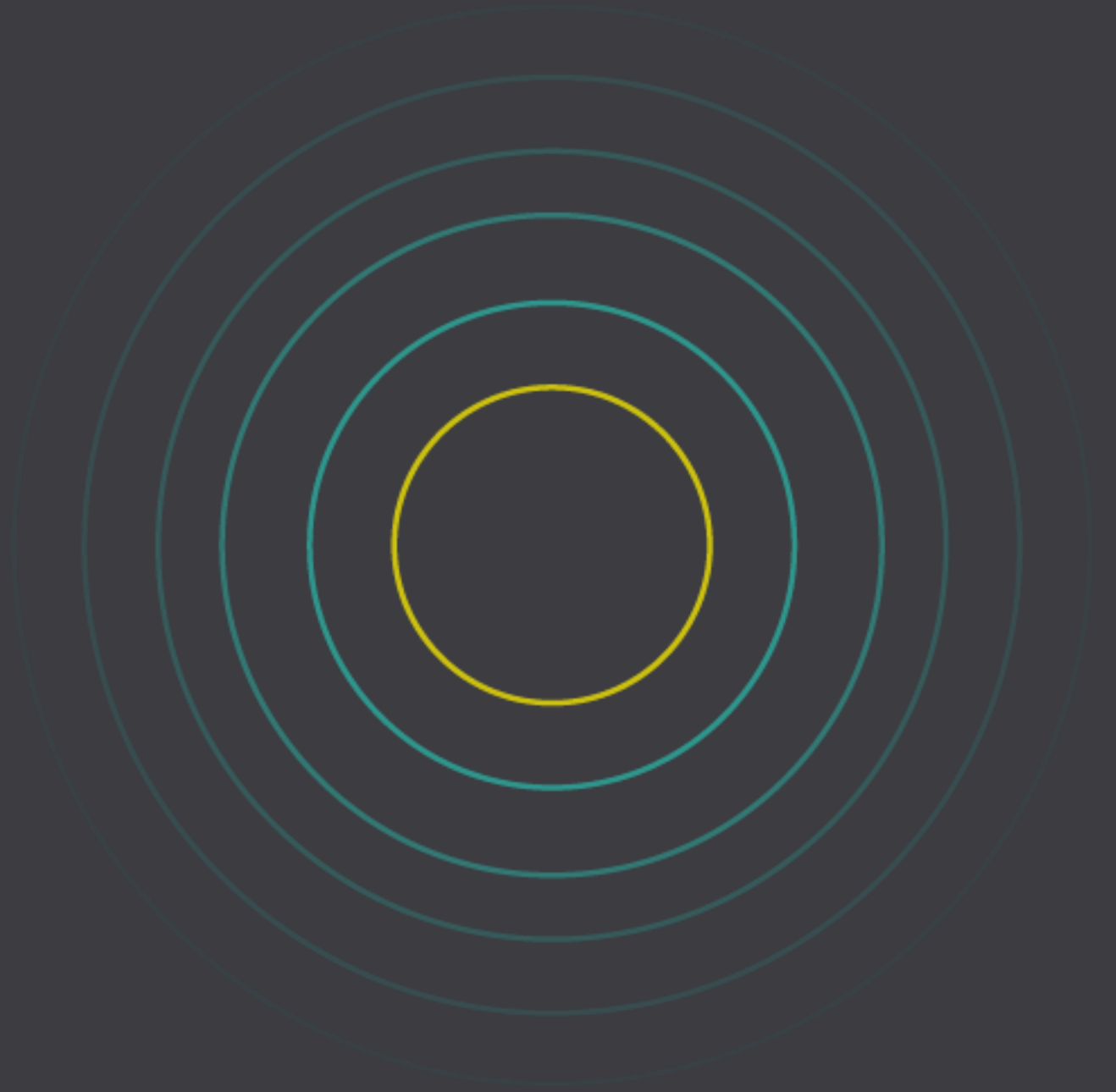
Introduction

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.

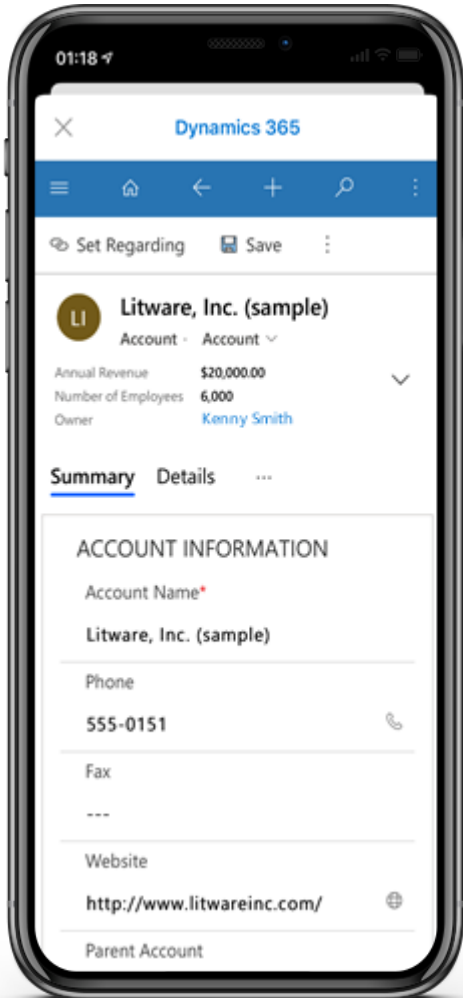
Introduced in 2015 and continuously updated, the modern **Dynamics 365 App for Outlook** is functionally on par with the Outlook COM add-in while bringing additional capabilities, such as seamless deployment, availability across desktop, web, and mobile, and runs on Unified Interface.

Dynamics 365 App for Outlook

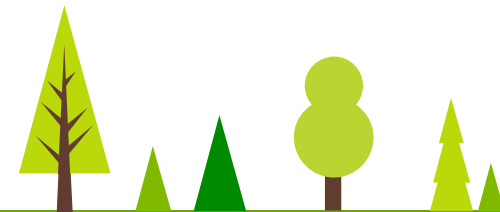


Overview of the Dynamics 365 App for Outlook

With Dynamics 365 App for Outlook, you can:



- ✓ **View contextual 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.

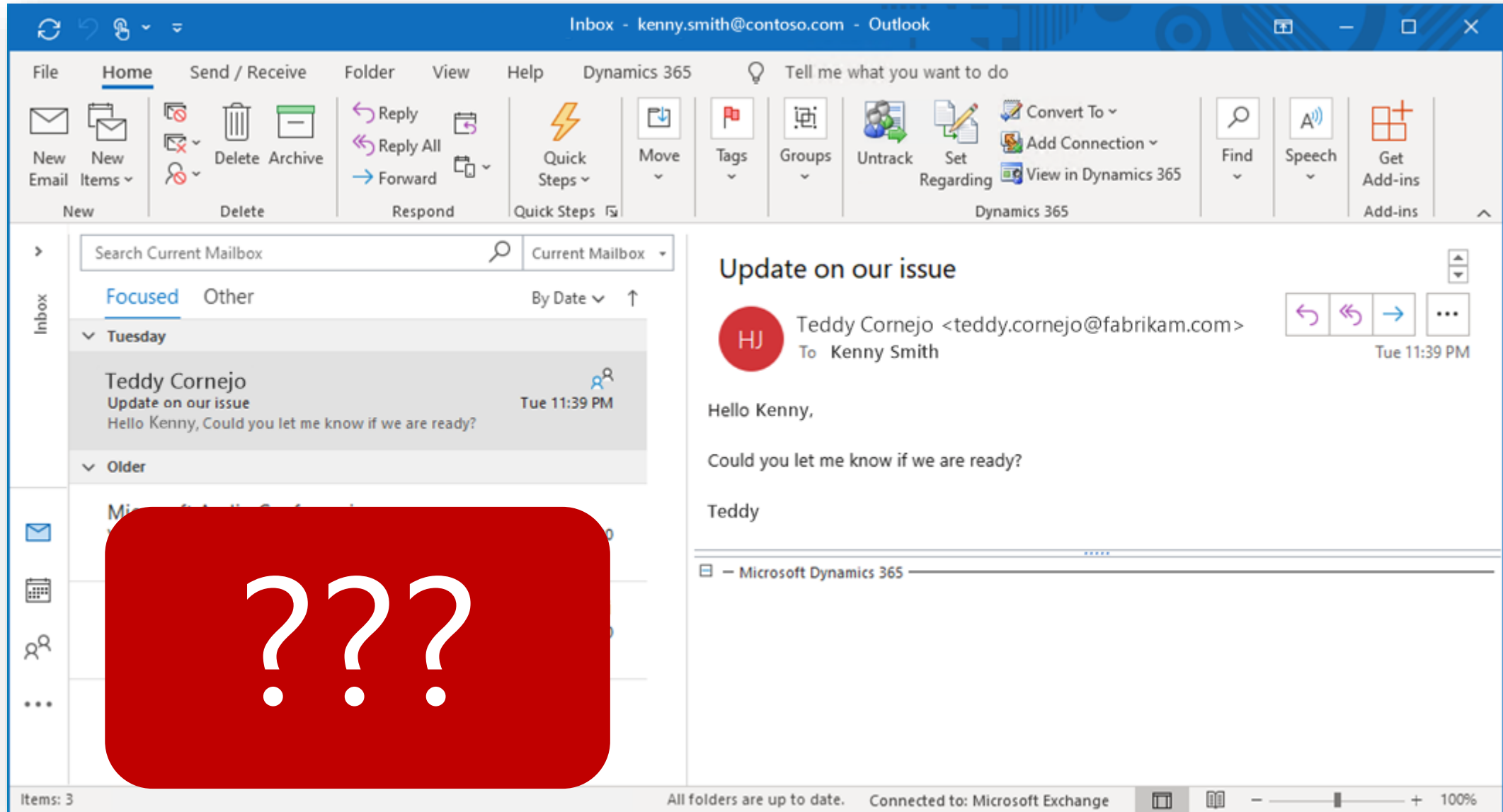


* Dynamics 365 app represents Dynamics 365 Sales, Dynamics 365 Customer Service, Dynamics 365 Marketing, Dynamics 365 Field Service, or Dynamics 365 Project Service Automation.

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!



The image displays three screenshots of the Dynamics 365 app for Outlook, illustrating how it integrates email context with CRM data.

Left Screenshot: Email Context
This screenshot shows an email interface with a header "Update on our issue". The email is from Teddy Cornejo to Kenny Smith, dated Wed 3/18/2020 12:38 AM. The body of the email says "Hello Kenny, Could you let me know if we are ready? Teddy". Below the email body, there are three buttons: "Yes, we're ready.", "Yes, I will let you know.", and "Yes, you are.". At the bottom, there is a feedback question: "Are the suggestions above helpful?" with "Yes" and "No" options.

Middle Screenshot: Contact Details
This screenshot shows the Dynamics 365 app interface. The top bar has the Dynamics 365 logo and a search icon. Below the bar, there is a navigation menu with icons for home, back, forward, and search. The main content area shows a contact card for Teddy Cornejo, who is a Group Purchaser. The card displays his phone number (555-1010) and his email address (Kenny Smith). The card is highlighted with a green rounded rectangle.

Right Screenshot: Account Information
This screenshot shows the Dynamics 365 app interface. The top bar has the Dynamics 365 logo and a search icon. Below the bar, there is a navigation menu with icons for home, back, forward, and search. The main content area shows a contact card for Teddy Cornejo, who is a Group Purchaser. The card displays his phone number (555-1010) and his email address (Kenny Smith). The card is highlighted with a green rounded rectangle.



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 web interface. The top navigation bar includes the Outlook logo, a search bar, and various utility icons. The left sidebar shows the 'Inbox' and other folders. The main pane displays an email thread from Teddy Cornejo. The right sidebar shows the Dynamics 365 integration. A context menu is open over the Dynamics 365 sidebar, highlighting the 'Add Task', 'Add Appointment', and 'Add Phone Call' options.

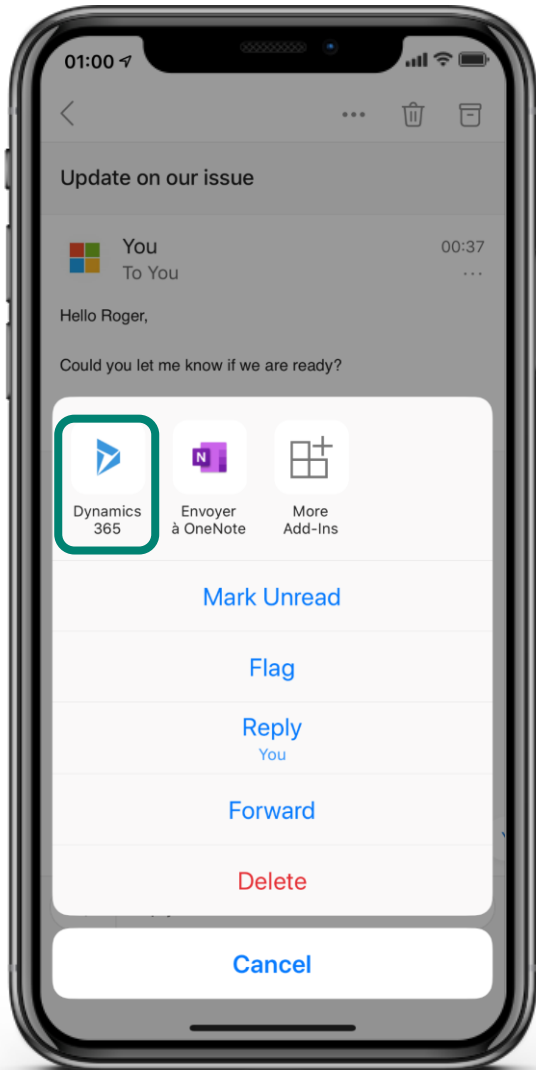
Outlook Interface Elements:

- Navigation Bar:** Outlook logo, Search bar, and icons for settings, help, and notifications.
- Left Sidebar:** Favorites, Inbox, Alpine Ski House (...), Sent Items, Drafts (1), Add favorite, Folders, Groups.
- Main Pane:**
 - Focused Tab:** Teddy Cornejo, Update on our issue, Wed 3/18, Tracked To Dynami... Hello Kenny, Could you le
 - January:**
 - Microsoft Audio Conferencing: You now have Audio Confer... 1/1/2020 – You now have Audio Conferencing for Micrc
 - FastTrack Demonstration: You've joined the FastTrack ... 1/1/2020 Work Brilliantly Together Welcome to the Fast
- Right Pane:**
 - Update on our issue:** Tracked To Dynami...
 - Teddy Cornejo: Wed 3/18/2020 12:38 AM, Kenny Smith
 - Hello Kenny,
 - Could you let me know if we are ready?
 - Teddy
 - Buttons: Yes, we're ready., Yes, I will let you know., Yes, you are.
 - Feedback: Are the suggestions above helpful? Yes No
- Dynamics 365 Sidebar:**
 - Tracked regarding
 - Case
 - Back
 - Context Menu:
 - Add Task
 - Add Appointment
 - Add Phone Call
 - Recipients

Work on the go in Microsoft Outlook Mobile App



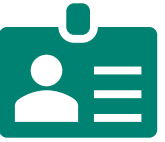
Now on the go!



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 window is titled "Outlook Contacts" and "Dynamics 365 Contacts". The left sidebar shows the "Dynamics 365" app icon. The top ribbon includes "Track", "Untrack", "Link", "Email", and "Appointment" buttons. The main area shows a list of Outlook contacts with columns: Tracked, Full Name, Title, Company, Business Phone, and Email. The first contact, "Carey Lindstrom", is highlighted with a green border. The right pane shows a list of Dynamics 365 accounts with columns: Account Name, Main Phone, and Address 1: City. The "Link" button is visible at the bottom right of the right pane.

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	Coho Winery (sample)	555-0109	someone_j@example.com
<input checked="" type="checkbox"/>	Maria Campbell (sample)	Purchasing Manager	Fabrikam, Inc. (sample)	555-0103	someone_d@example.com
<input type="checkbox"/>	Microsoft (do not reply)				maccount@microsoft.com
<input checked="" type="checkbox"/>	MyAnalytics				no-reply@microsoft.com
<input checked="" type="checkbox"/>	Nancy Anderson (sample)	Purchasing Assistant	Adventure Works (sample)	555-0102	someone_c@example.com
<input checked="" type="checkbox"/>	Patrick Sands (sample)	Owner	Alpine Ski House (sample)	555-0110	someone_k@example.com
<input checked="" type="checkbox"/>	Patrick Sands (sample)	Marketing Specialist	A. Datum Corporation (sample)	555-0200	MarketInsights@microsoft.com
<input checked="" type="checkbox"/>	Paul Cannon (sample)	Purchasing Assistant	Alpine Ski House (sample)	555-0107	someone_h@example.com

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 calendar. The main window shows a calendar view for Thursday, March 12, and Friday, March 13, 2020. A meeting titled "Customer Visit" is scheduled for Thursday, March 12, from 2:00 PM to 4:00 PM. The meeting details are visible in the right pane, showing the title "Customer Visit", the required attendee "Patrick Sands (sample) <MarketInsights@microsoft.com>", and the start and end times. The Dynamics 365 app is open in a separate window, displaying the "Customer Visit" record. The app shows the account "A. Datum Corporati...", the contact "Rene Valdes (sample)" with email "someone9@example.com" and phone "555-0158", and the attendee "Patrick" with initials "PS". The app also shows a "Tracked regarding" section and a "Room Finder" section.

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.

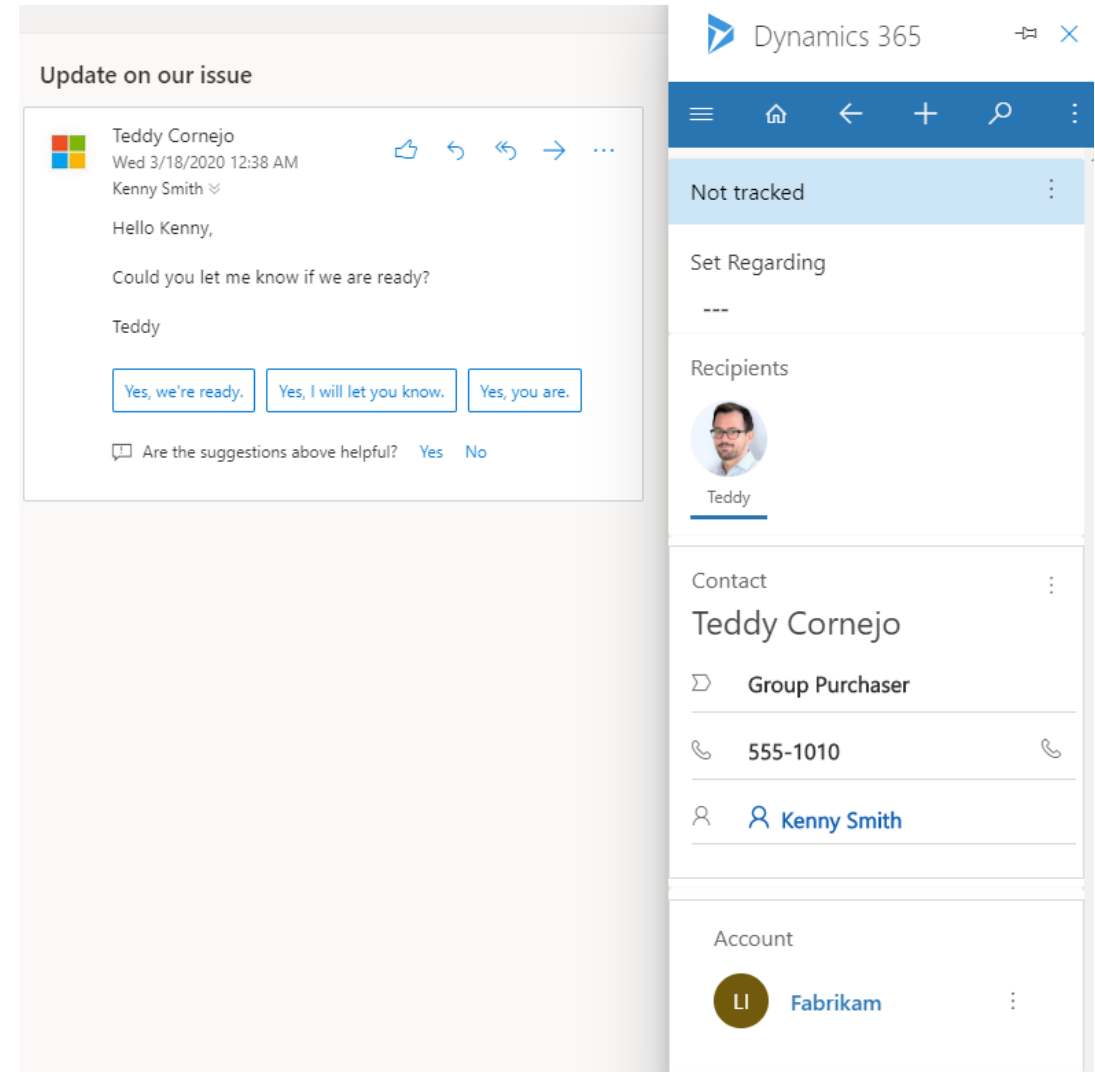
Manager

Delegate: Assistant

Another example:

Employee A (On Holiday)

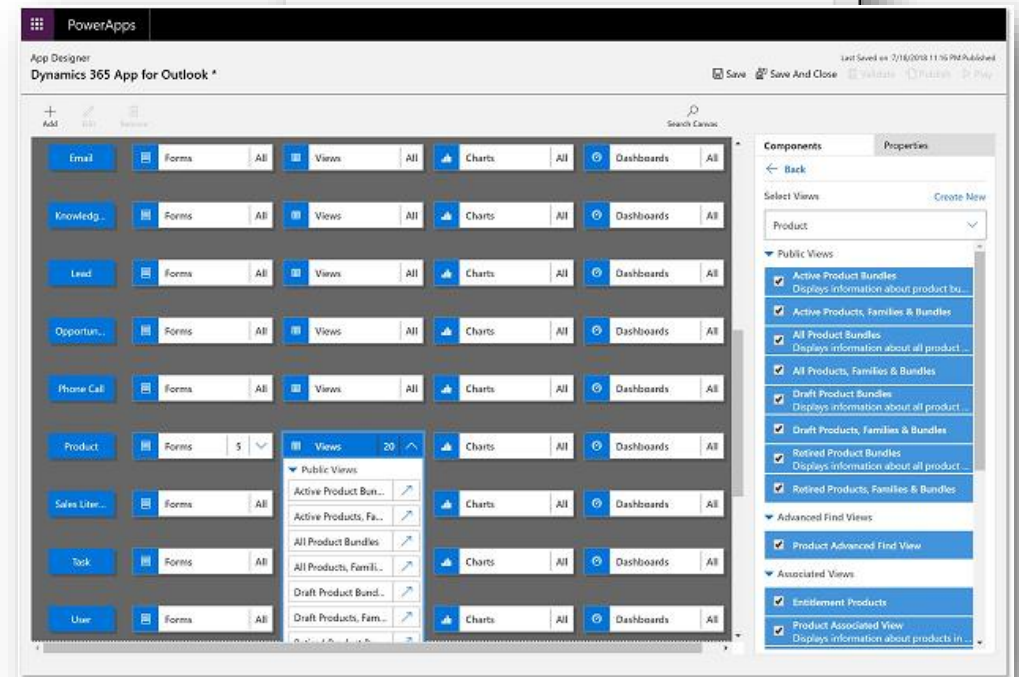
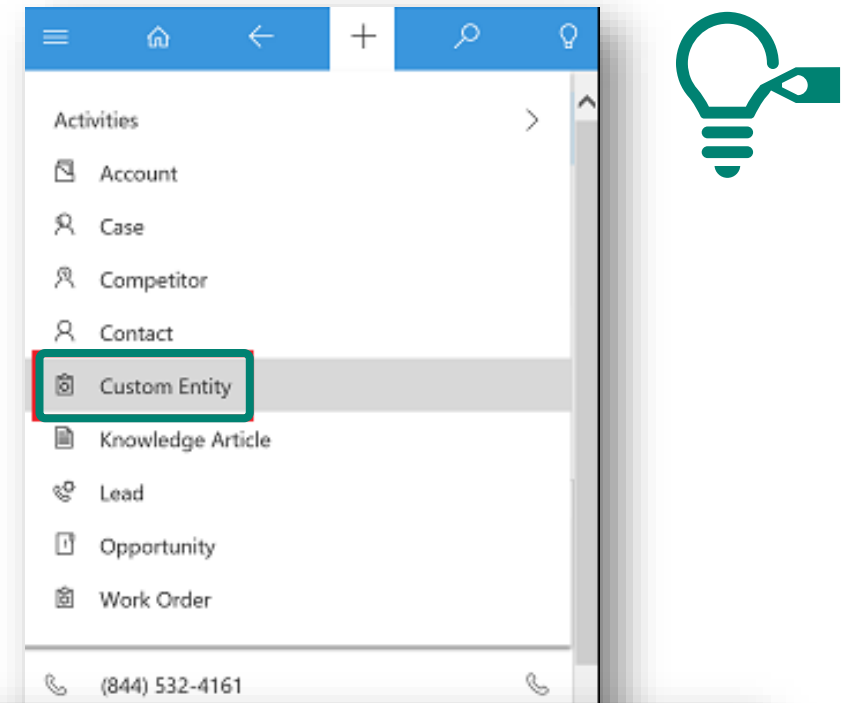
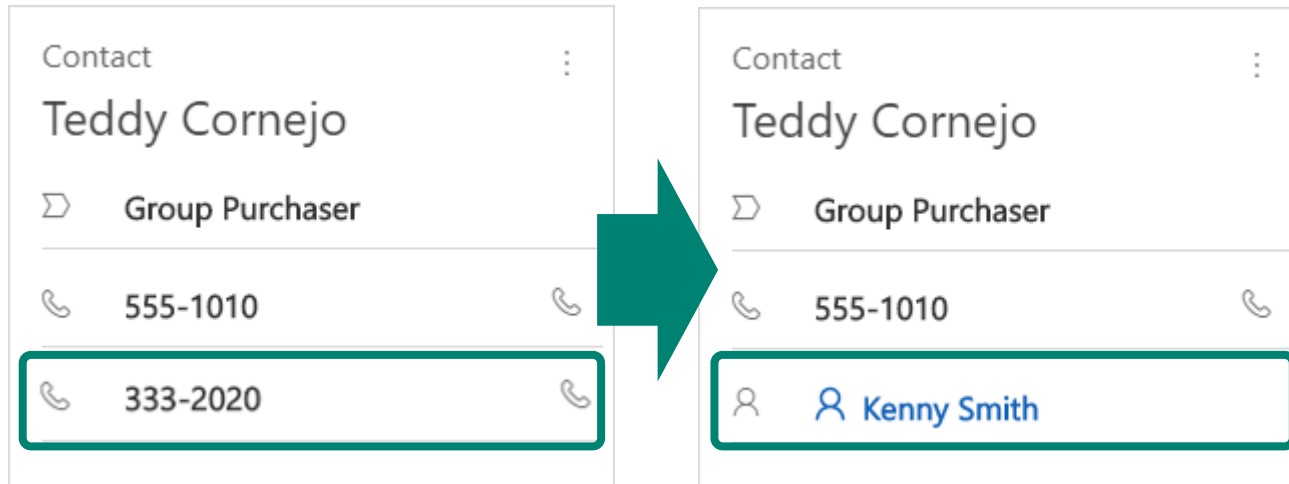
Delegate: Employee B (Helping out)



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 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 web interface. On the left, the 'Inbox' is selected, showing a list of emails. Two emails are highlighted with green boxes and labeled 'Tracked To Dynamics 365': one from Teddy Cornejo and another from Microsoft Audio Conferencing. A context menu is open over the Microsoft Audio Conferencing email, showing the 'Categorize' option selected. This opens a sub-menu where 'Tracked To Dynamics 365' is chosen, with a checkmark indicating it is the active category. Other categories listed include Blue, Green, Orange, Purple, Red, and Yellow. On the right side of the Outlook interface, a Dynamics 365 sidebar is visible. It shows a 'Tracked regarding' section with a green bar. Below this, a 'Case' is listed as 'Item defecti...' with a sample ID 'CAS-01009-P0S3D1' and a contact 'Fabrikam, Inc. (sample)'. The 'Recipients' section shows 'Henry' and the 'Contact' section shows 'Teddy Cornejo'.

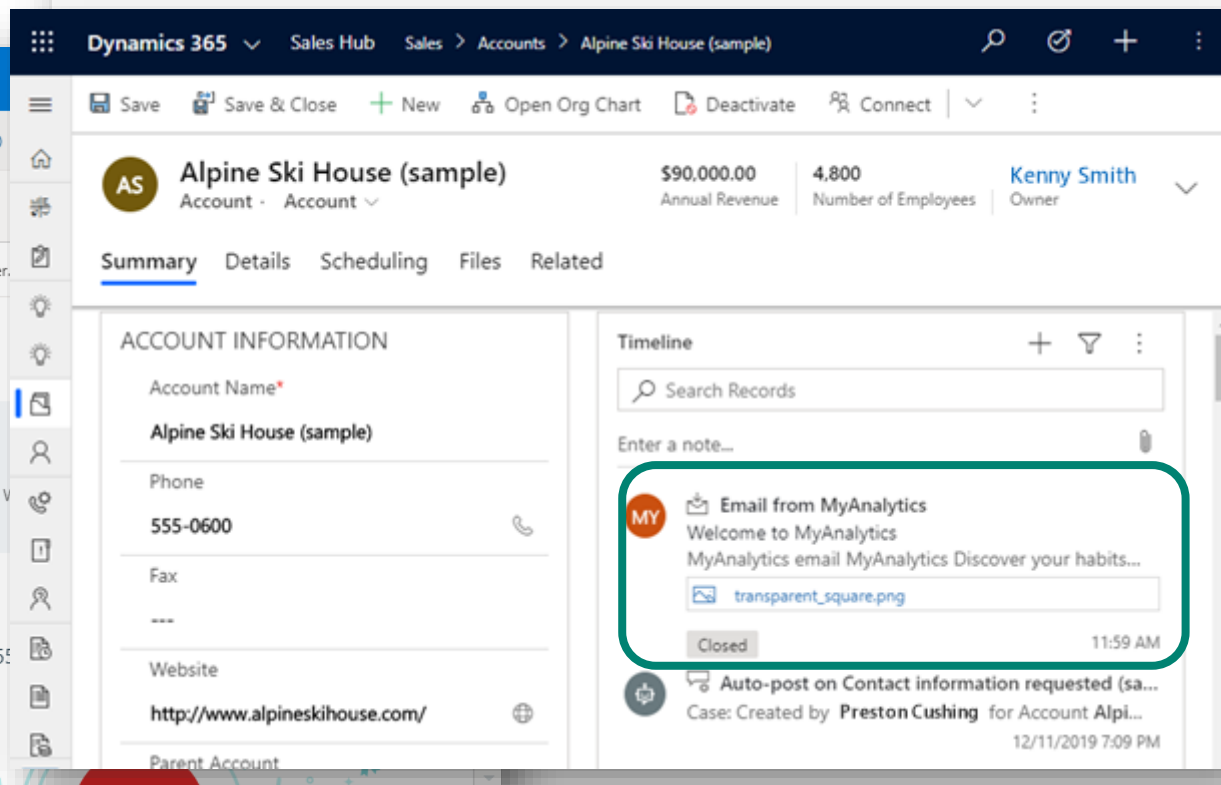
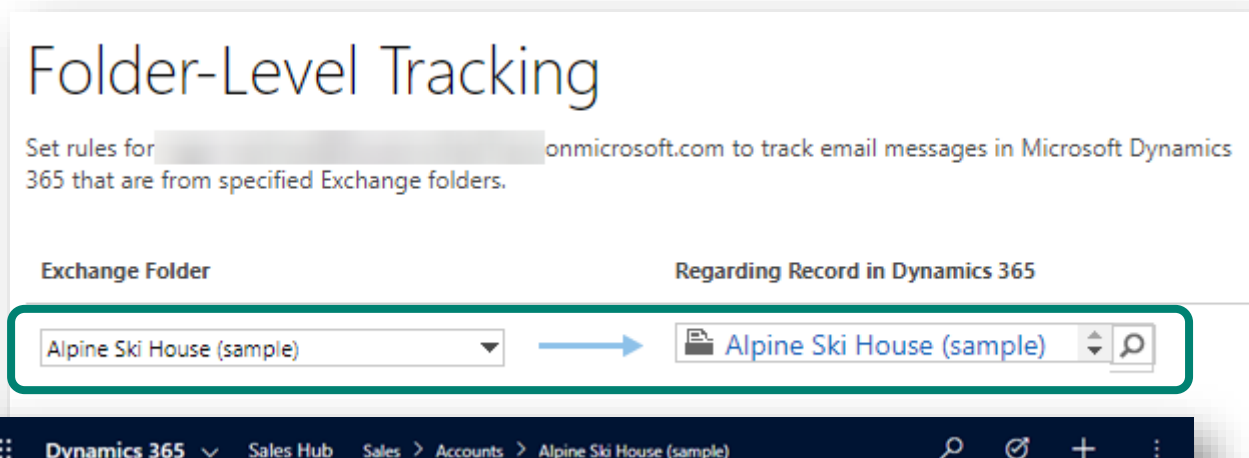
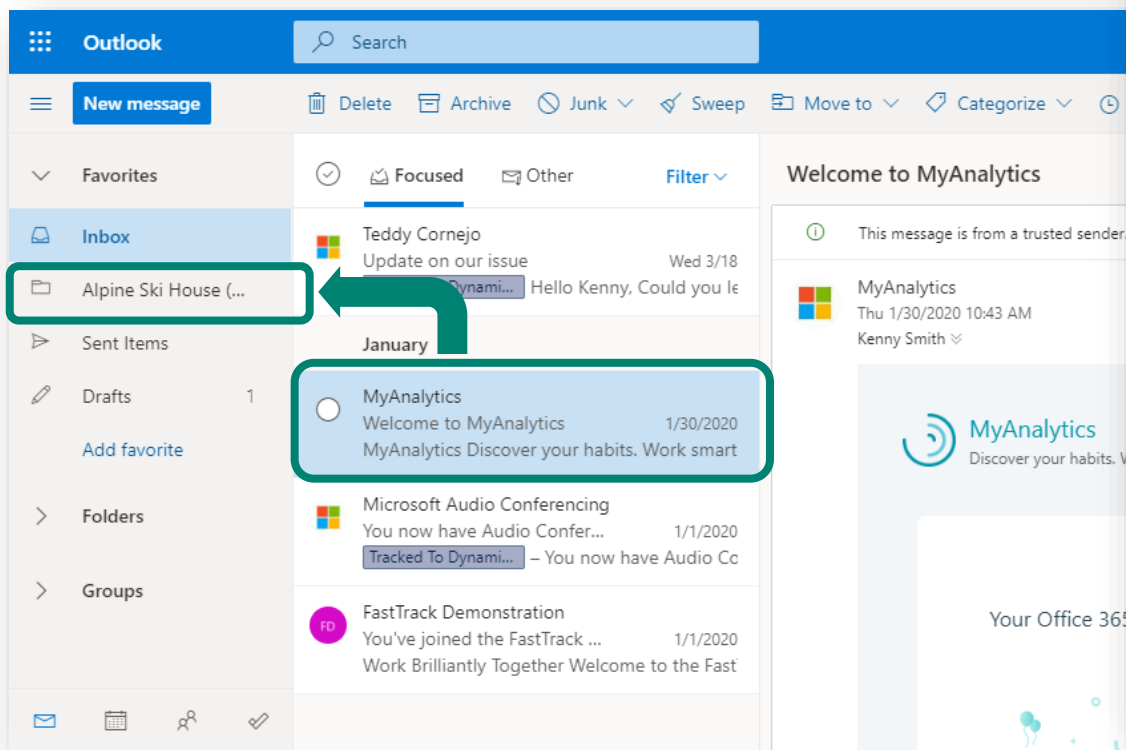
<https://docs.microsoft.com/power-platform/admin/use-outlook-category-track-appointments-emails>

BONUS: Tracking 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

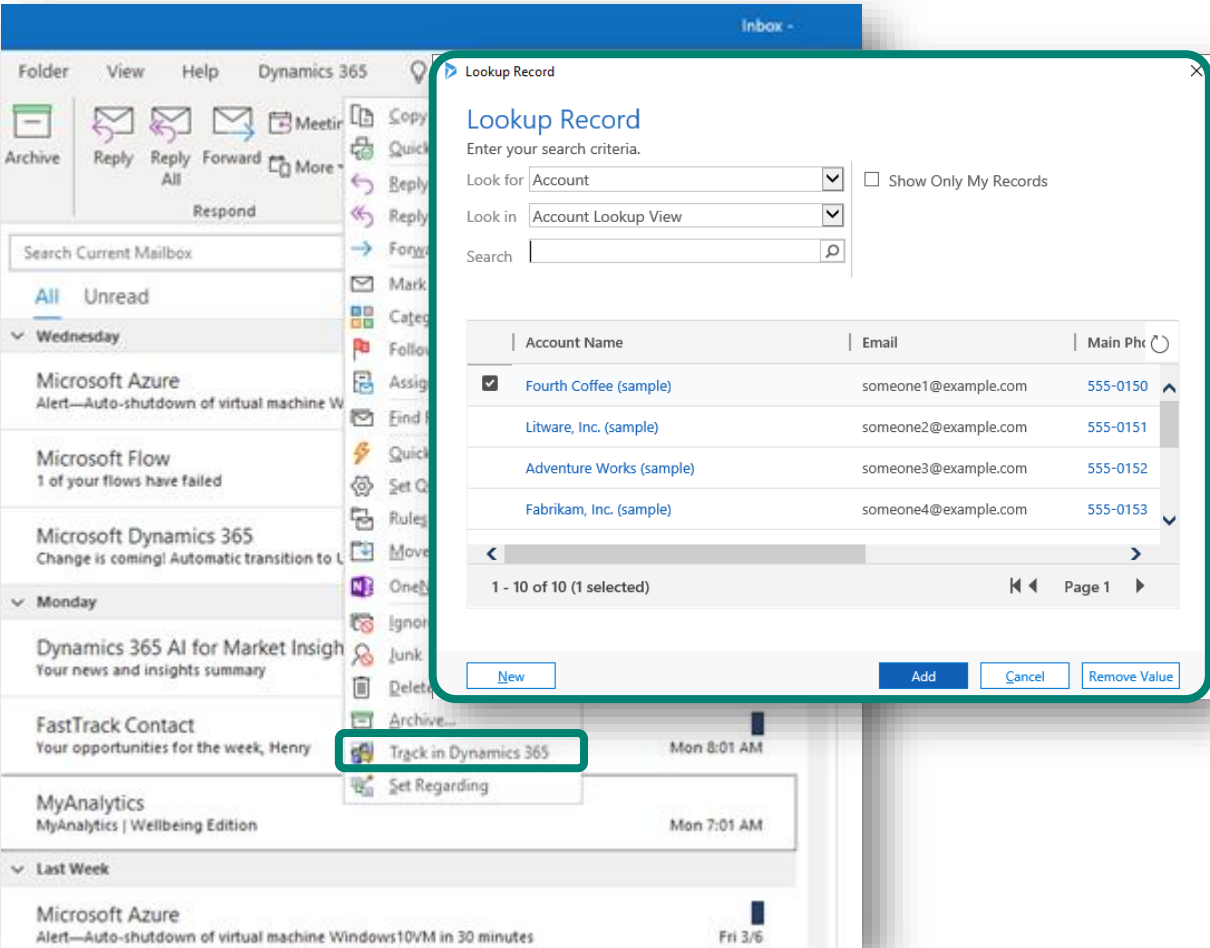


Comparison between the Outlook COM add-in and Dynamics 365 App for Outlook

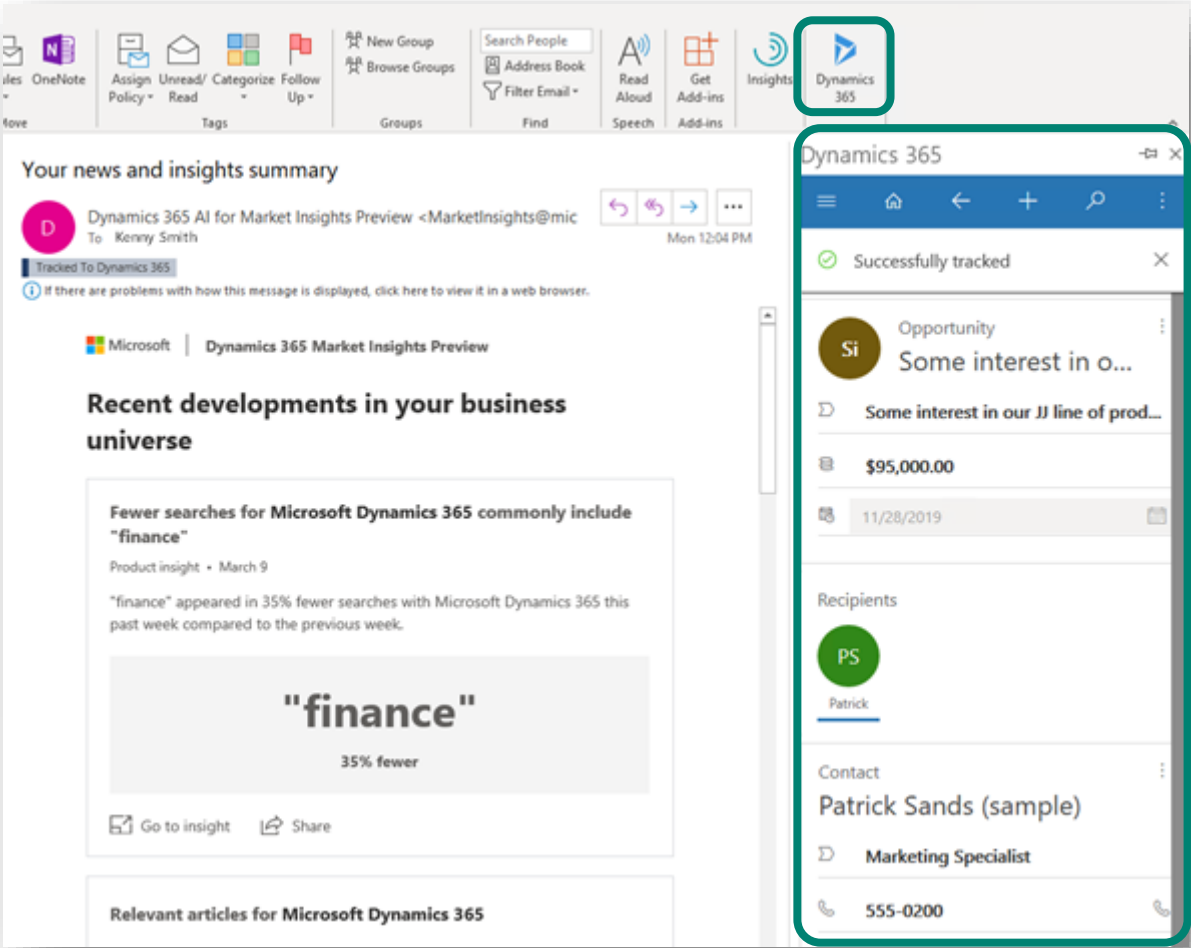


Compares Experiences: tracking items

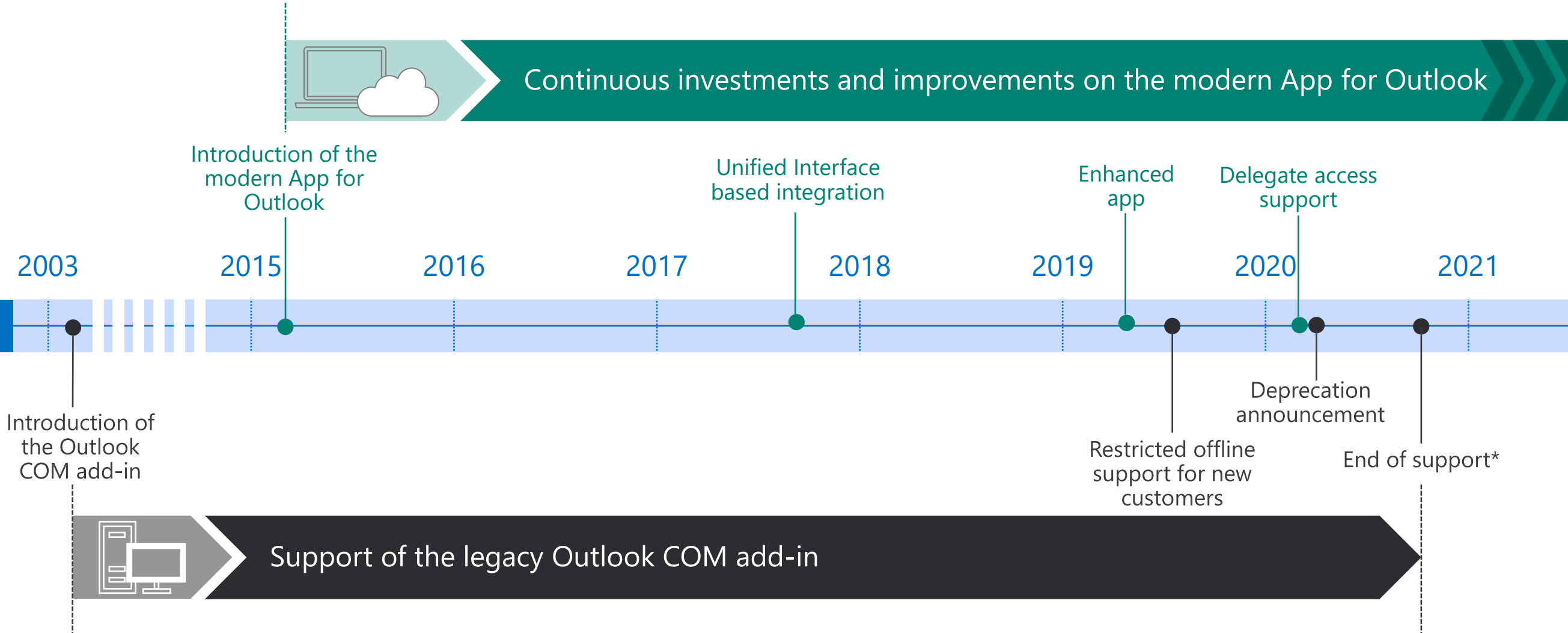
Outlook COM add-in Tracking Email
Heavy but limited integration



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 (<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
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

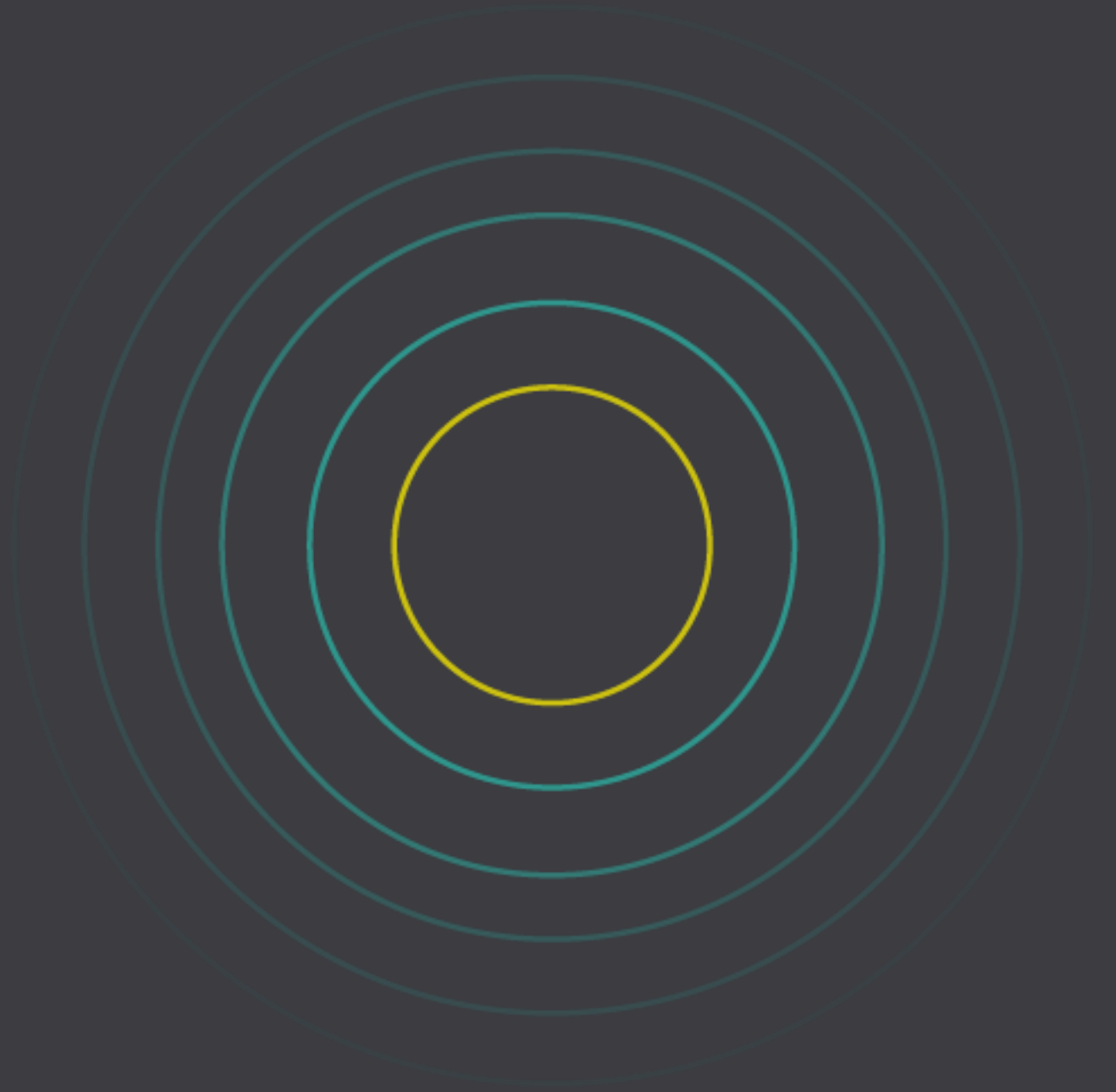
New Improved Online Solution Available

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 (<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

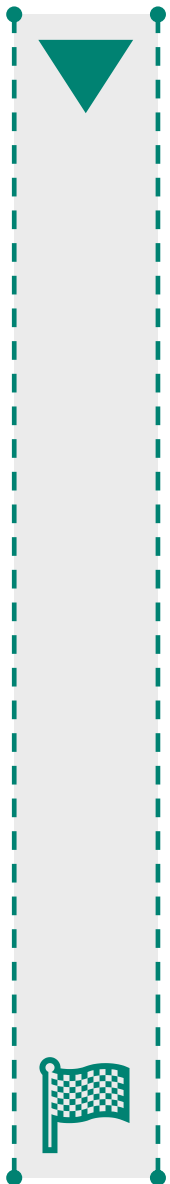
Benefits

- 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

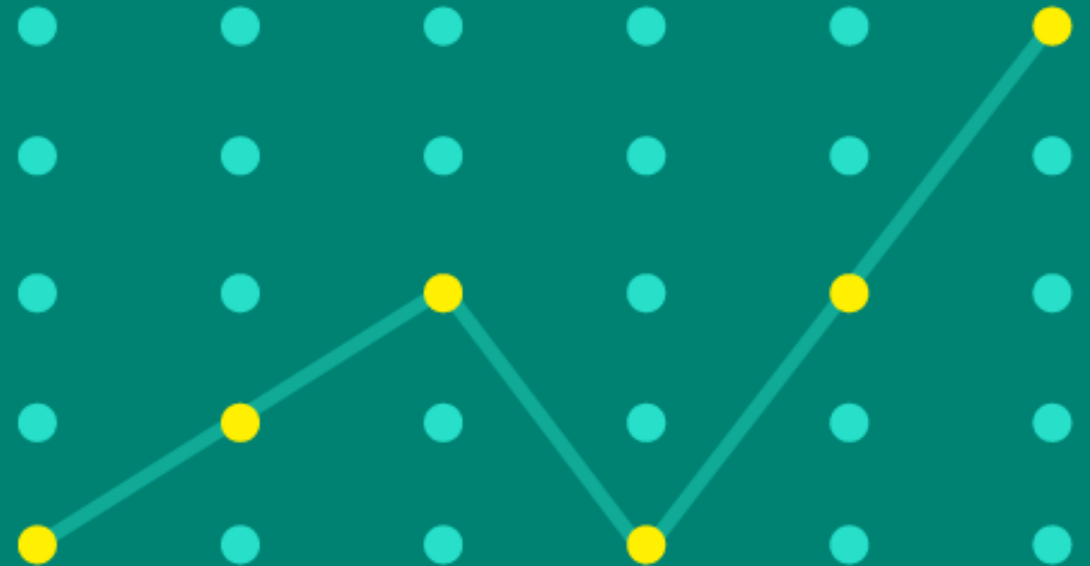
Considerations

- 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 the 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	<ul style="list-style-type: none">• Exchange Server 2013 CU 14 or greater• Exchange Server 2016• Exchange Online
Email Client	<ul style="list-style-type: none">• Outlook 2019• Outlook 2016 (C2R) 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>• 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) <i>Support for 2013 versions of Office 365 ProPlus ended February 28, 2017</i>• 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)	<ul style="list-style-type: none">• 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

Assess your technical landscape

Supported configurations with Microsoft Exchange

Dynamics 365 Customer Engagement apps (Online)		Exchange 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
		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

	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

Assess your technical landscape

Supported languages

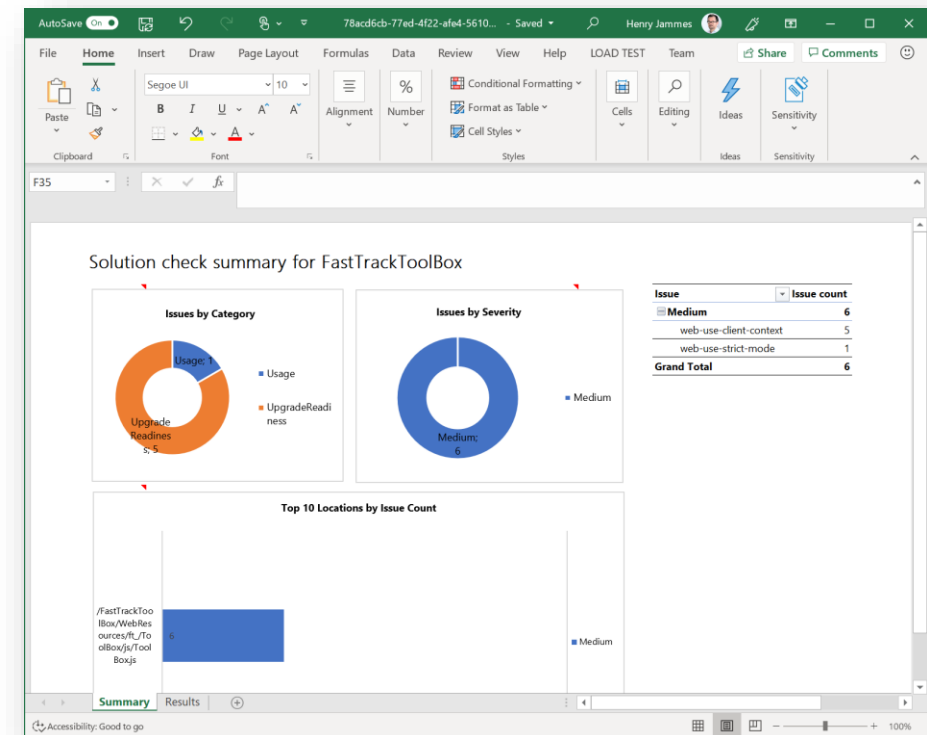
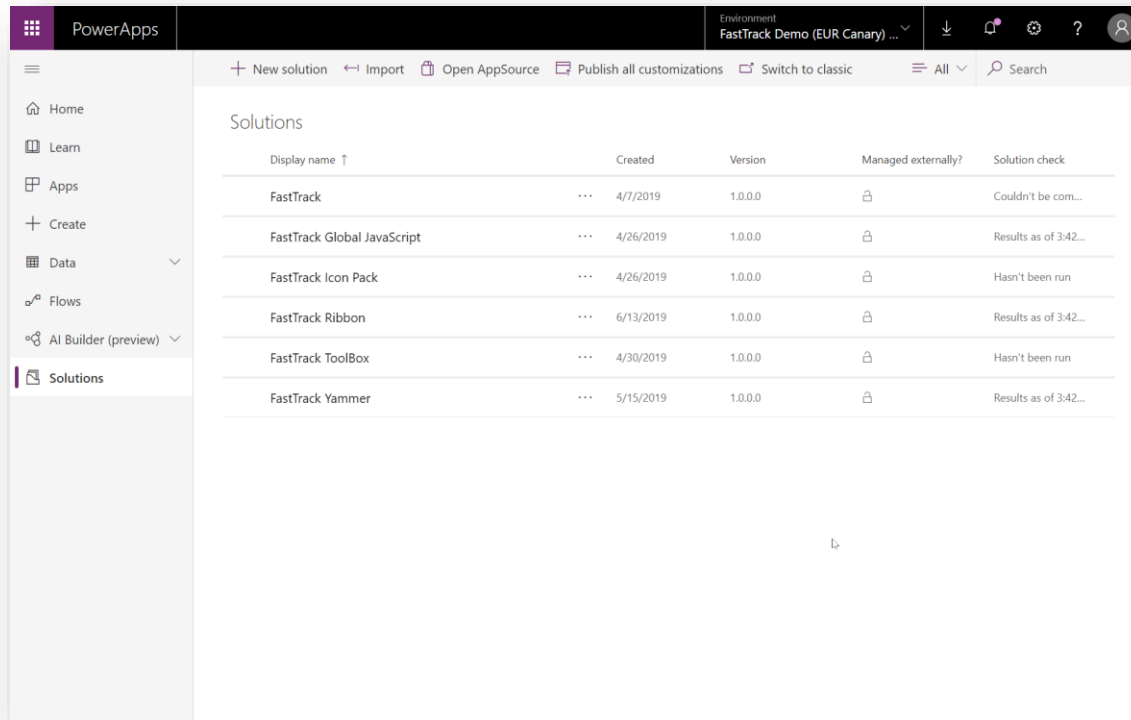
- **Bulgarian** (Bulgaria) - 1026
- **Chinese** (People's Republic of China) - 2052
- **Chinese** (Taiwan) - 1028
- **Croatian** (Croatia) - 1050
- **Czech** (Czech Republic) - 1029
- **Danish** - 1030
- **Dutch** - 1043
- **English** - 1033
- **Estonian** - 1061
- **Finnish** - 1035
- **French** - 1036
- **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

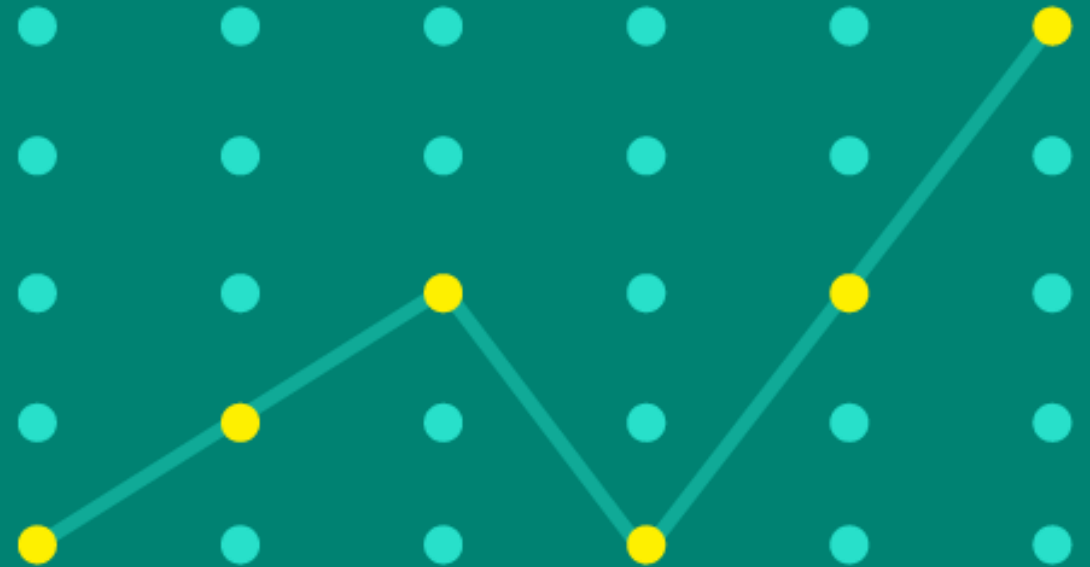
Validate custom form scripting to make sure they will render well in Dynamics 365 App for Outlook

Use the Power Apps Solution Checker to check your customizations

- In make.powerapps.com, 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.

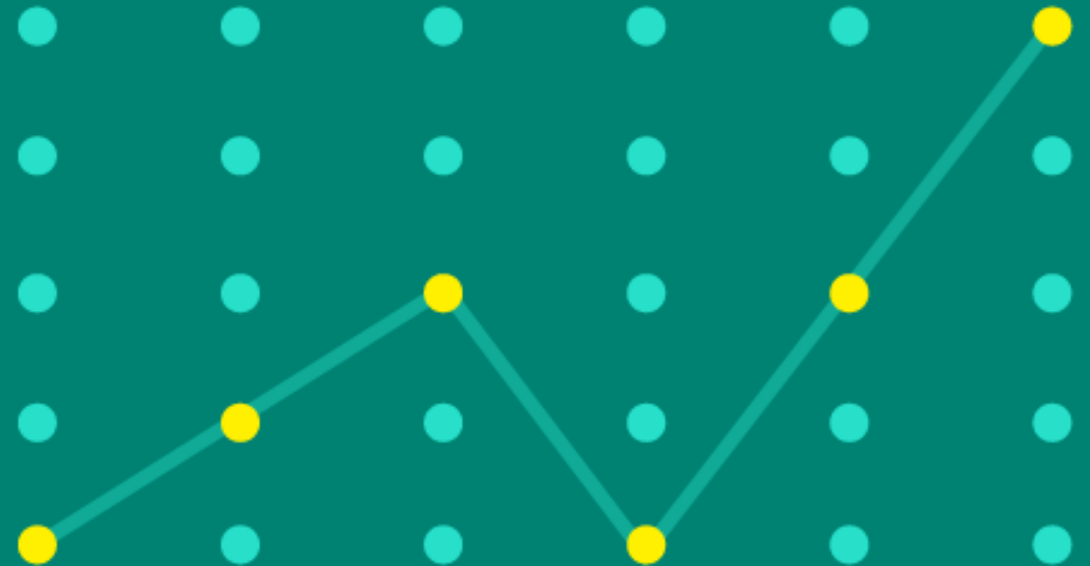
Best Action:

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

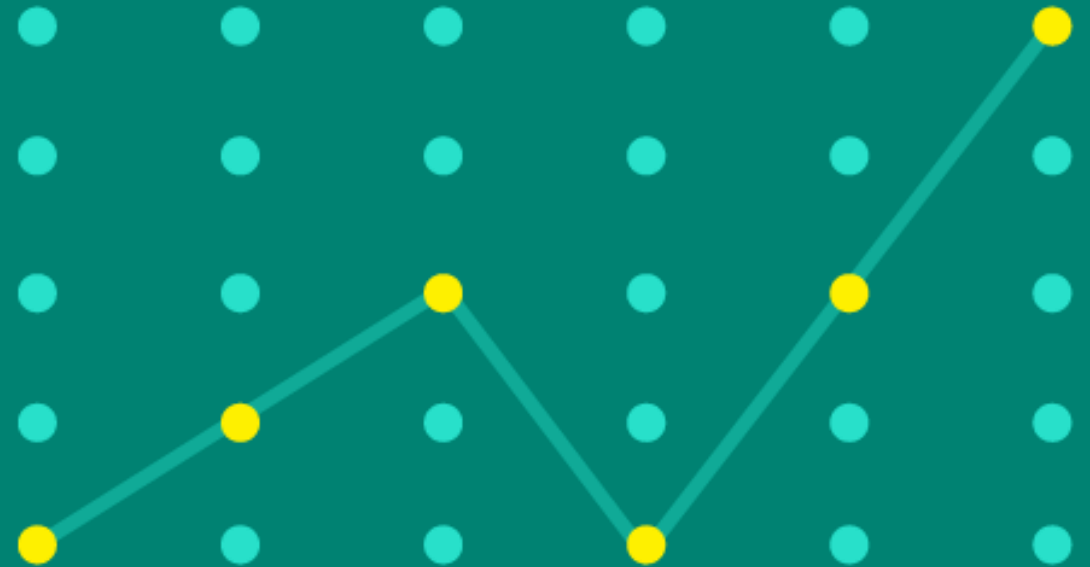


Identify your functional use cases

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

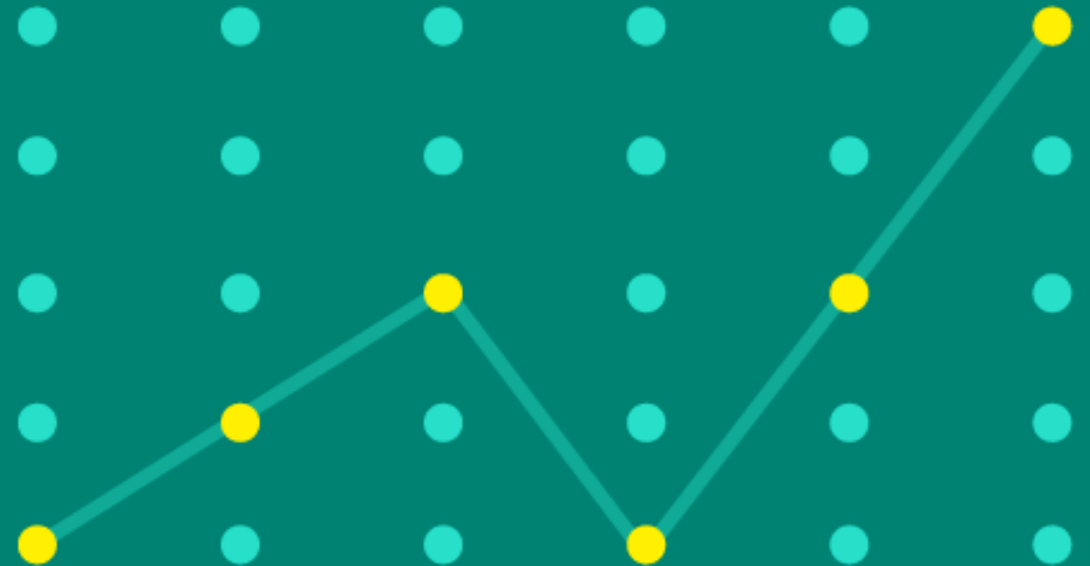


Mapping to the new App for Outlook capabilities

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

- ✓ As of March 2020, offline feature is only available for iOS and Android devices.
- ✓ 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



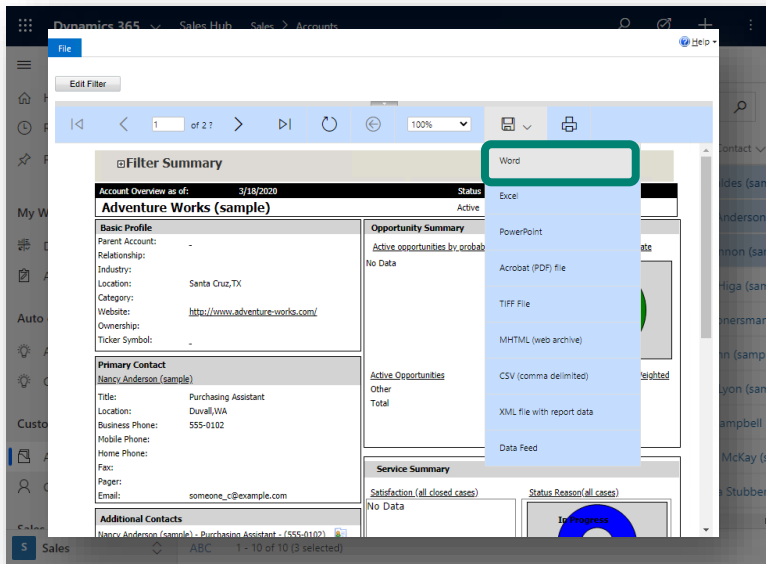
Word mail-merge has been deprecated since 2018
<https://docs.microsoft.com/power-platform/important-changes-coming#mail-merge-is-deprecated>



Alternatives exist with Reports, Document Templates or Power Automate

Reports

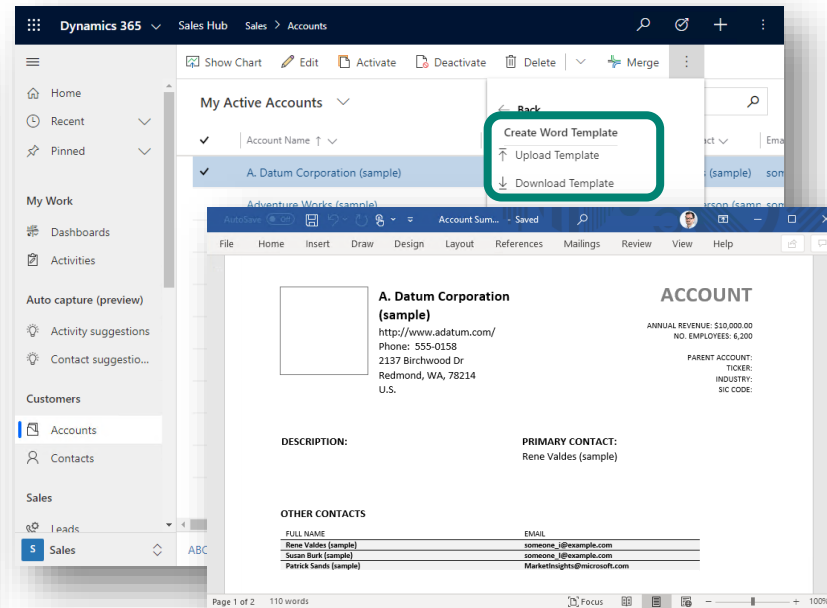
- ✓ Dynamics 365 apps can include reports that render data in a desired layout or format.
- ✓ Reports can be exported as a Word file.
- ✓ Reports can be run against multiple records.
- ✓ Reports are based on SQL Server Reporting Services (SSRS).



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

Document Templates

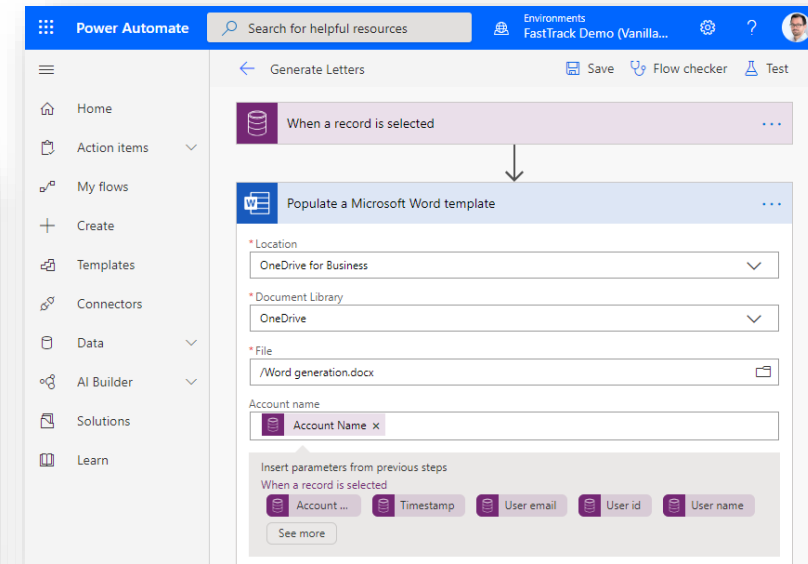
- ✓ You can create and import Word templates into Dynamics 365 apps.
- ✓ With one click, users can generate standardized documents automatically populated with data.
- ✓ Documents can be generated one record at a time.



<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.

The screenshot displays the Microsoft Power Apps interface. On the left, the 'Entities' list is visible, with 'Opportunity' selected. A context menu is open over the 'Opportunity' entity, with 'Edit data in Excel' highlighted. The background shows an Excel spreadsheet with a table of opportunity data. The table has columns: Topic, Currency (lookup), Owner (lookup), and Status. The data rows are as follows:

Topic	Currency (lookup)	Owner (lookup)	Status
10 orders of Product SKU JJ202	US Dollar		Won
10 orders or 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; will	US Dollar		Open
Very interested in our products - need to follow up (san	US Dollar		Won
They seem to be interested in 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



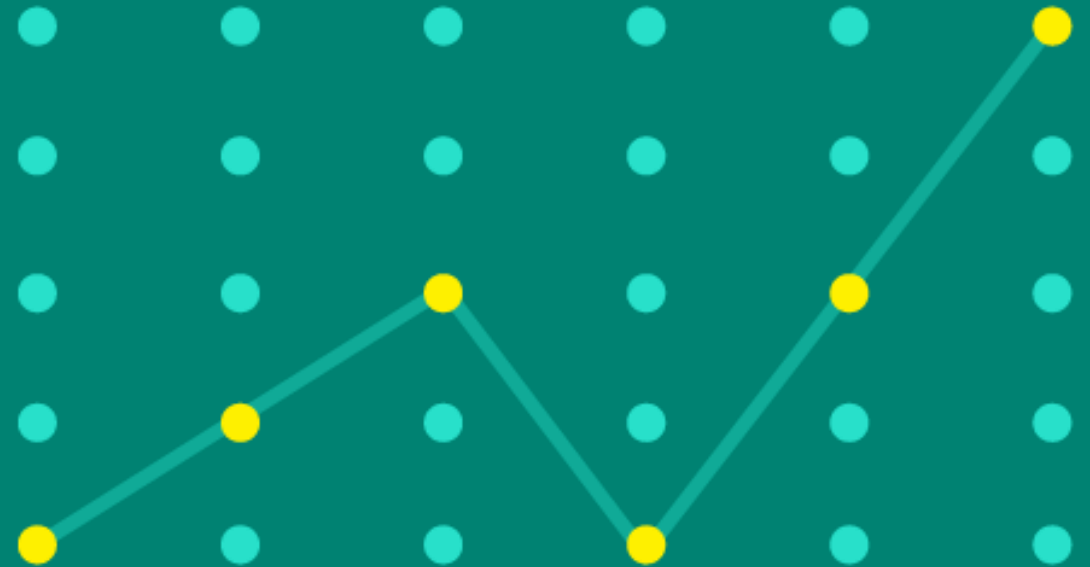
Microsoft Excel with Power Query

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' button is clicked, leading to the 'From Online Services' option. The 'Dynamics 365 (online)' dialog box is open, showing the 'Basic' tab with the Web API URL 'https://ftdemo-vanilla.crm.dynamics.com/api/data/v9.1'. The 'Navigator' pane on the right shows a list of entities, with 'opportunities' selected. The 'Table Name' dropdown in the 'Table Tools' ribbon is set to 'opportunities'. The 'Queries & Connections' pane on the right shows the 'opportunities' query loaded with 10 rows.

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	
			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.
- ✓ **Uninstall the legacy Dynamics 365 for Outlook** on that test user's computer.
- ✓ **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

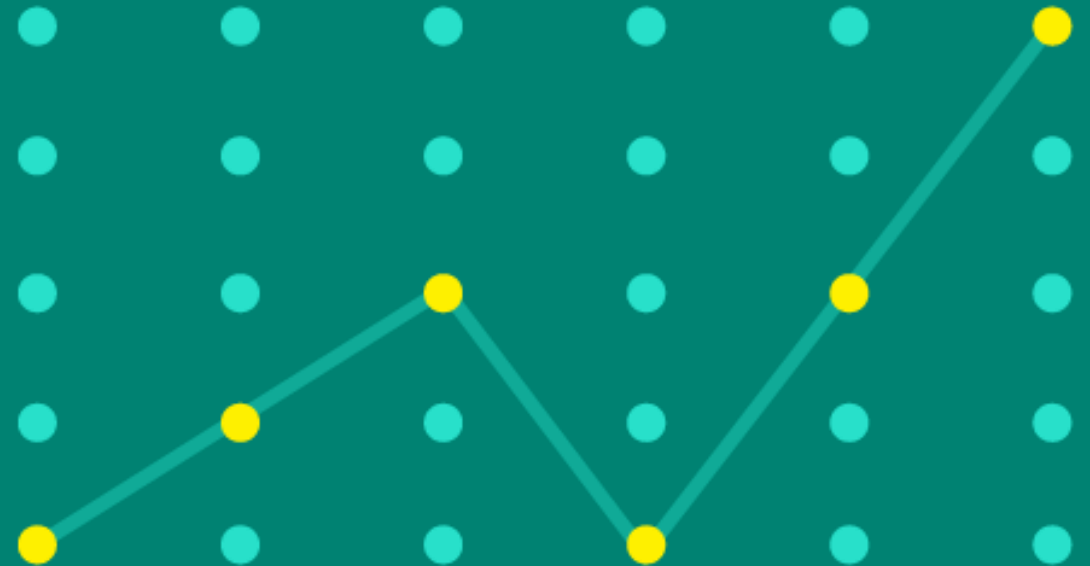
- ✓ Any **business process that needs to be addressed in a different way.**
- ✓ Any potential **regressions.**
- ✓ User **pain points** that could lead to optimizations or specific training.



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.

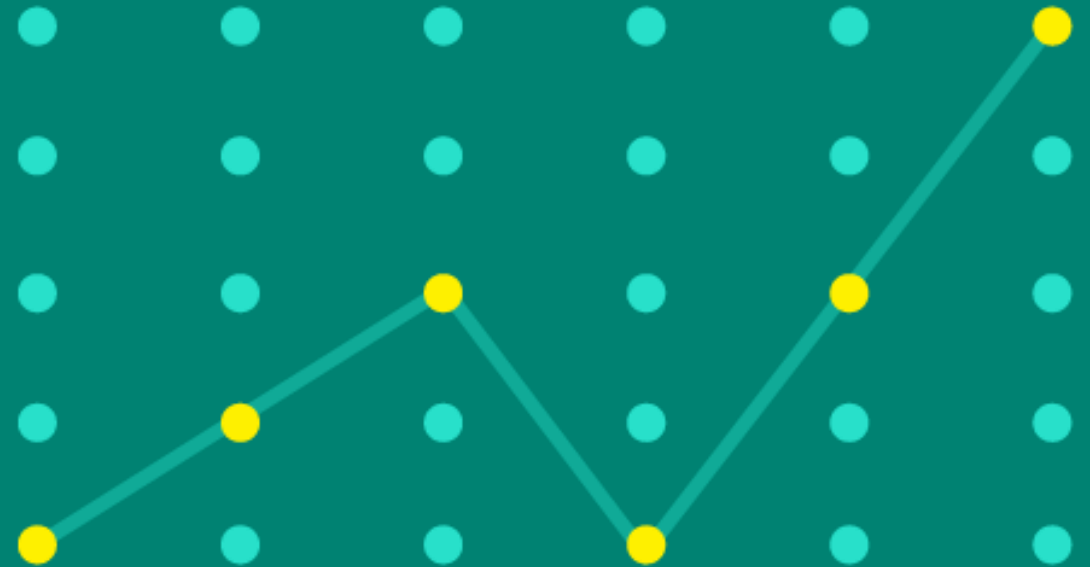


Also consider testing any scenario **where Dynamics 365 for Outlook was required** (i.e. Excel integration, Word mail merge).



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

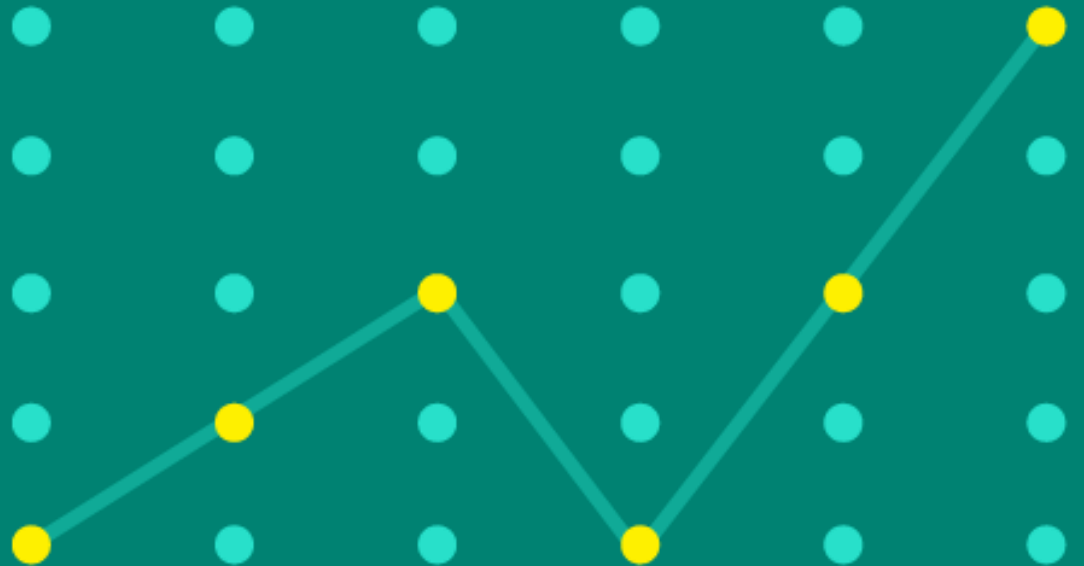
- Leverage your internal support organization and make sure it is ready for Dynamics 365 App for Outlook
- Consider having local power users for level 1 support



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 Synchronization

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 App for Outlook



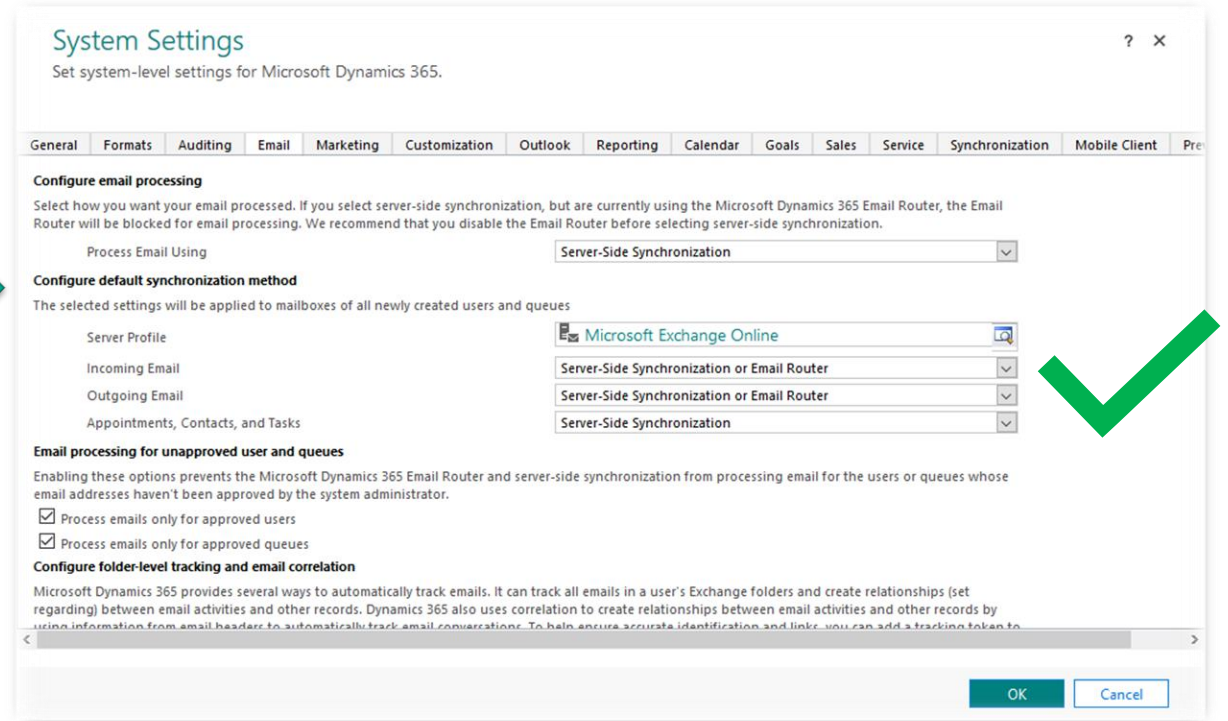
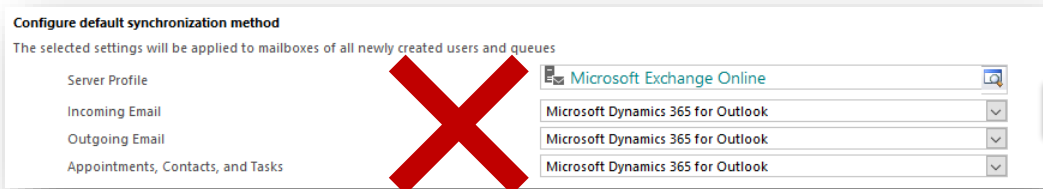
1. Set Server-Side Synchronization as Default Server Profile, replacing Dynamics 365 for Outlook

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](#)
- In some situations, we advise to review and configure [synchronization system filters](#) before switching to server-side synchronization. Please refer to questions 14 and 15 of the FAQ, at the end of this document.
- You can also set the [email server profile](#) option "[Process Email From](#)" to the date of your migration.

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 Settings**

- ✓ 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	KB 2691237
TraceLogPersistenceTimeInDays						Add	KB 2691237
TrackAppointmentsFromNonOrganizer						Add	KB 2849744
TrackCategorizedItems						Add	KB 2691237
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

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.

Optional: Set distinctions between physical and logical deletes



Server-Side synchronization needs a mechanism to distinguish between Logical and Physical deletes of entities in Dynamics 365. A setting exists to potentially prevent unintended deletes in appointments and contacts in Exchange.

For example by default, when a user loses access to the tracked appointment in Dynamic 365 (due to change of privileges, security role, change of business unit etc.), the appointment will be deleted in Exchange and a cancellation will be sent to participants.

To prevent deletions, you need to enable the OrgDBOrgSetting tool in your environment and set the **DistinctPhysicalAndLogicalDeletesForExchangeSync** setting to true.

- False: No distinction between physical and logical deletes for exchange sync delete scenario
- True: Physical and logical deletes will be distinguished for exchange sync delete scenario

The screenshot shows the OrgDBOrgSetting tool interface. A table lists various settings, with 'DistinctPhysicalAndLogicalDeletesForExchangeSync' highlighted in red. The setting is currently set to 'false'. A modal dialog is open, showing the same setting name and a dropdown menu with 'false' selected. The dialog includes buttons for 'Update', 'Reset Default', 'Remove Setting', and 'Cancel'. Below the buttons, there is a detailed description of the setting's behavior.

Setting Name	Value	Default	Type	Unit	Min	Max	Action	Link
DisableSharePointConnectionKeepAlive	false	not set	Boolean	-	-	-	Add	KB 2691237
DisableSmartMatching	false	not set	Boolean	-	-	-	Add	KB 2691237
DistinctPhysicalAndLogicalDeletesForExchangeSync	false	false	Boolean	-	-	-	Edit	KB 2691237
DoNotIgnoreInternalEmailQueues	true	not set	Boolean	-	-	-	Add	KB 2691237
EmailEditorSkipNewLineInIE	false	not set	Boolean	-	-	-	Add	KB 2691237
EnableActivitiesTimeLinePerfImprovement	0	1	Number	0	1	-	Edit	KB 2691237
EnableAppointmentBroadcastingForOutlookSync	0	not set	Number	0	1	-	Add	KB 2691237
EnableBulkReparent	true	not set	Boolean	-	-	-	Add	KB2691237
EnableCrmStatecodeOnOutlookCategory	true	not set	Boolean	-	-	-	Add	KB2691237
EnableQuickFindOptimization	1	not set	Number	0	1	-	Add	White Paper
EnableRelinkingToExistingCRMRecord								91237
EnableRetrieveMultipleOptimization								91237
EnableSssItemLevelMonitoring								91237
EnableUnifiedInterfaceShellRefresh								91237
EnableViewSelectorForEmailTemplatesInPerso								91237
ExchangeSyncMappingPersistenceTimeInD								91237
ExpireChangeTrackingInDays								91237
ExpireSubscriptionsInDays								91237
ExportedExcelRetentionWindow								91237
ForceRetrievePublishedMetadataForRetrieveA								91237
FullTextSpecialCharactersToRemoveFromSear								91237
GrantFullAccessForMergeToMasterOwner								91237
GrantSharedAccessForMergeToSubordinateC								91237
HideEmailAutoTrackOptions								91237
HideStageAndUpgrade	1	not set	Number	0	1	-	Add	KB 2691237
HideTrackAllOption	false	not set	Boolean	-	-	-	Add	KB 2691237
HierarchyLevelForHierarchyFeature	3	not set	Number	1	100	-	Add	KB 2691237
IdsCountBeforeUsingInJoinsForSecurity	1000	not set	Number	0	2147483647	-	Add	KB 2691237

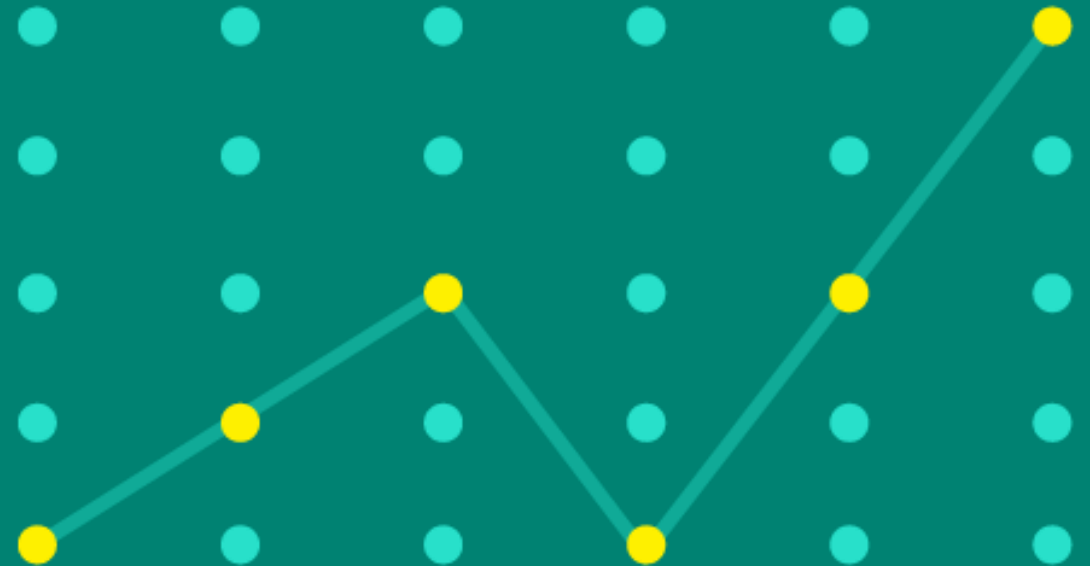
Setting Description:

DistinctPhysicalAndLogicalDeletesForExchangeSync:

Default False. Server-Side synchronization mechanism to distinguish between Logical and Physical deletes of records in CRM. **False:** *DEFAULT* No distinction between physical and logical deletes for exchange sync delete scenario. **True:** Physical and logical deletes will be distinguished for exchange sync record deletions.

Example: Jayne has Server-Side synchronization (SSS) enabled and tracked appointment 'bike repair' in CRM. If Jayne lost read access to 'bike repair' (logical delete of 'bike repair' for Jayne), then SSS with default behavior will delete 'bike repair' from Exchange. With DistinctPhysicalAndLogicalDeletesForExchangeSync=true, logical deletions of 'bike repair' for Jayne will NOT delete 'bike repair' from Exchange.

Uninstall the
Dynamics 365 for
Outlook COM add-in



Uninstall the Dynamics 365 for Outlook COM add-in

Either from:



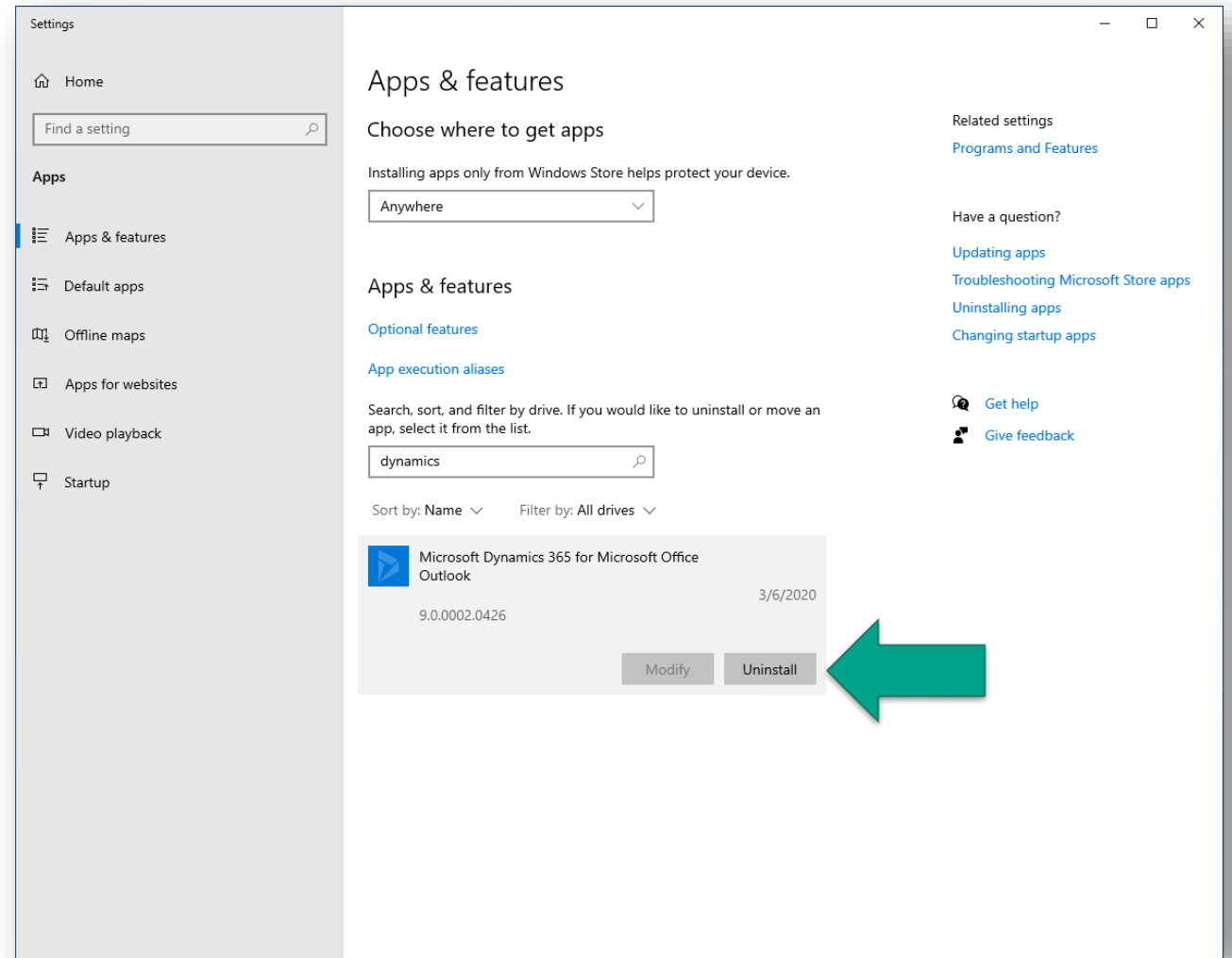
From individual client machines

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



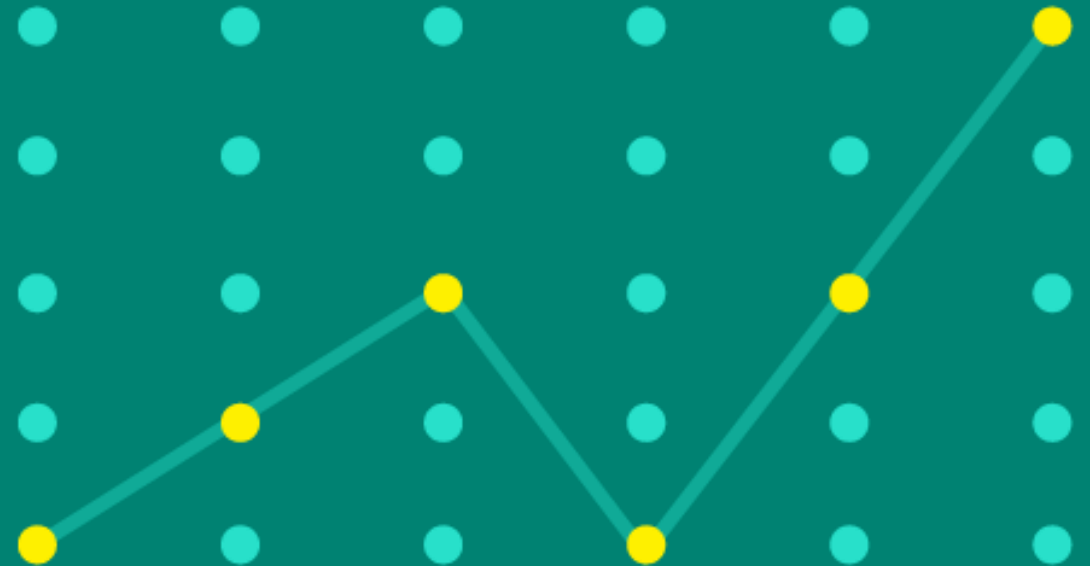
Uninstall for all your users

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



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

Update your new user onboarding process



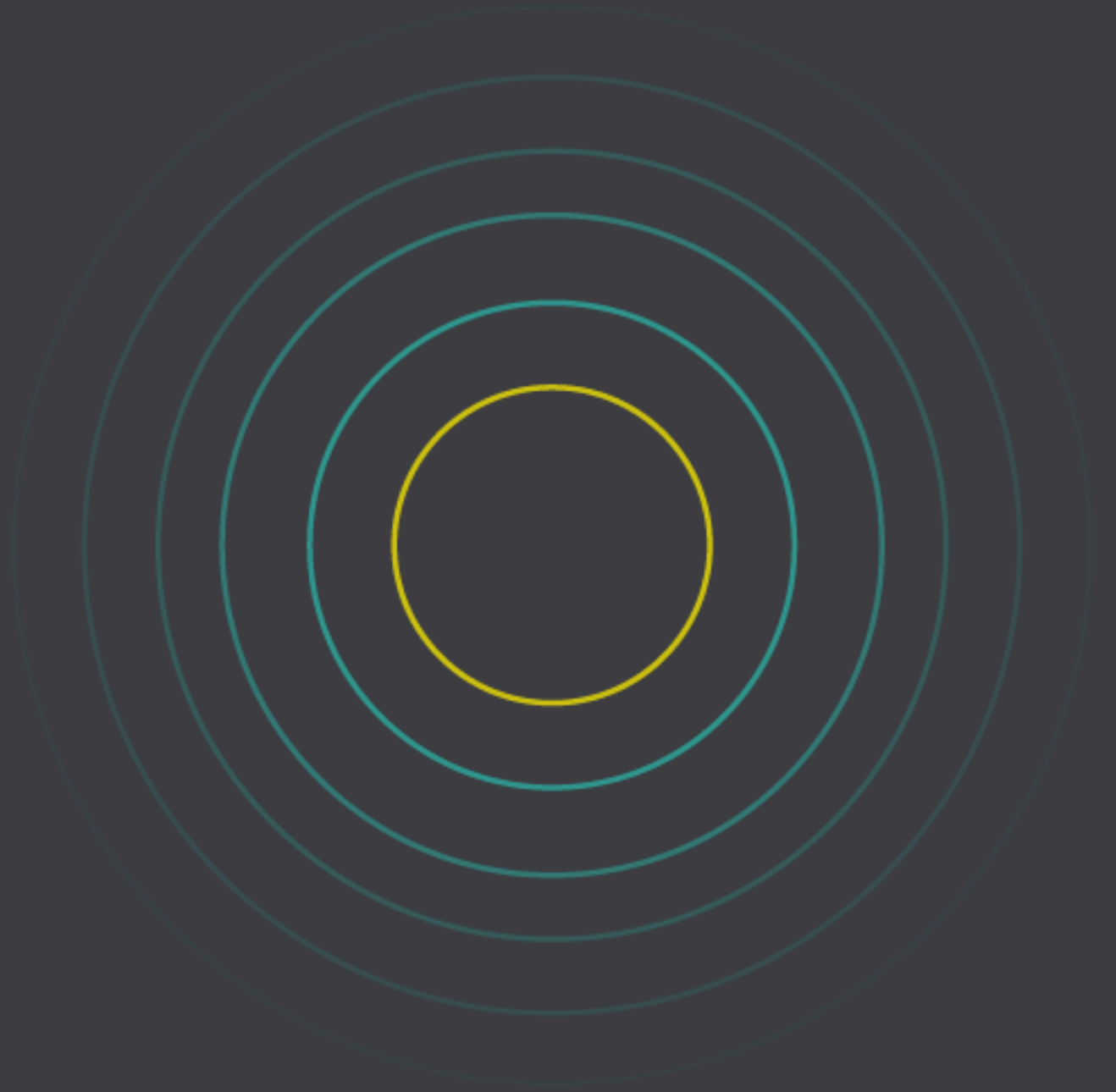
Update your new user onboarding process



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 (1/5)

	Concern	Answer
1	"We are still on Outlook/Exchange 2010 and/or CRM 2013 and will not be moving to the cloud."	<i>Outlook and Exchange 2010 are going to be out of support by Oct 2020.</i>
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."	<i>Offline for Windows 10 App is in the future roadmap</i> a. <i>With support for expressions that mimic client/server plugins</i> b. <i>Build a model-driven app that works offline</i>
3	"We need support for a delegate user to be able to go into Outlook and track appointments on users' behalf."	<i><u>Delegate support</u> is already available for Exchange Online customers</i>
4	"We need support for dynamic spreadsheets so users can work with Dynamics 365 views data in a spreadsheet on their machine."	<i>In Excel, natively connect to Dynamics 365 with Power Query. You can also explore the Microsoft Power Apps Office Add-in.</i>

Frequently Asked Questions

Common concerns (2/5)

	Concern	Answer
5	"Are there general guidelines to be considered to track sent items?"	<i>Please refer to that article: https://community.dynamics.com/crm/b/crminthefield/posts/dynamics-365-app-for-outlook-part-4-working-with-emails</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. This setting should be enabled by default. In case of issues, 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. You can also use Folder-tracking to track multiple items in bulk, against a same record.</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. This setting will be turned on by default for all customers in April/May 2020. To turn it on prior to that date, please raise a support request. You can reference: FCB.SSSSaveOutgoingEmailToExchangeSentFolder</i>

Frequently Asked Questions

Common concerns (3/5)

	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 <u>synchronized fields</u> between Outlook and Dynamics 365 to see what triggers updates in Outlook.</i></p> <p><i>You can leverage the <u>OrgDBOrgSetting AllowSaveAsDraftAppointment</u>. 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.</i></p> <p><i>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 3rd-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>

Frequently Asked Questions

Common concerns (4/5)

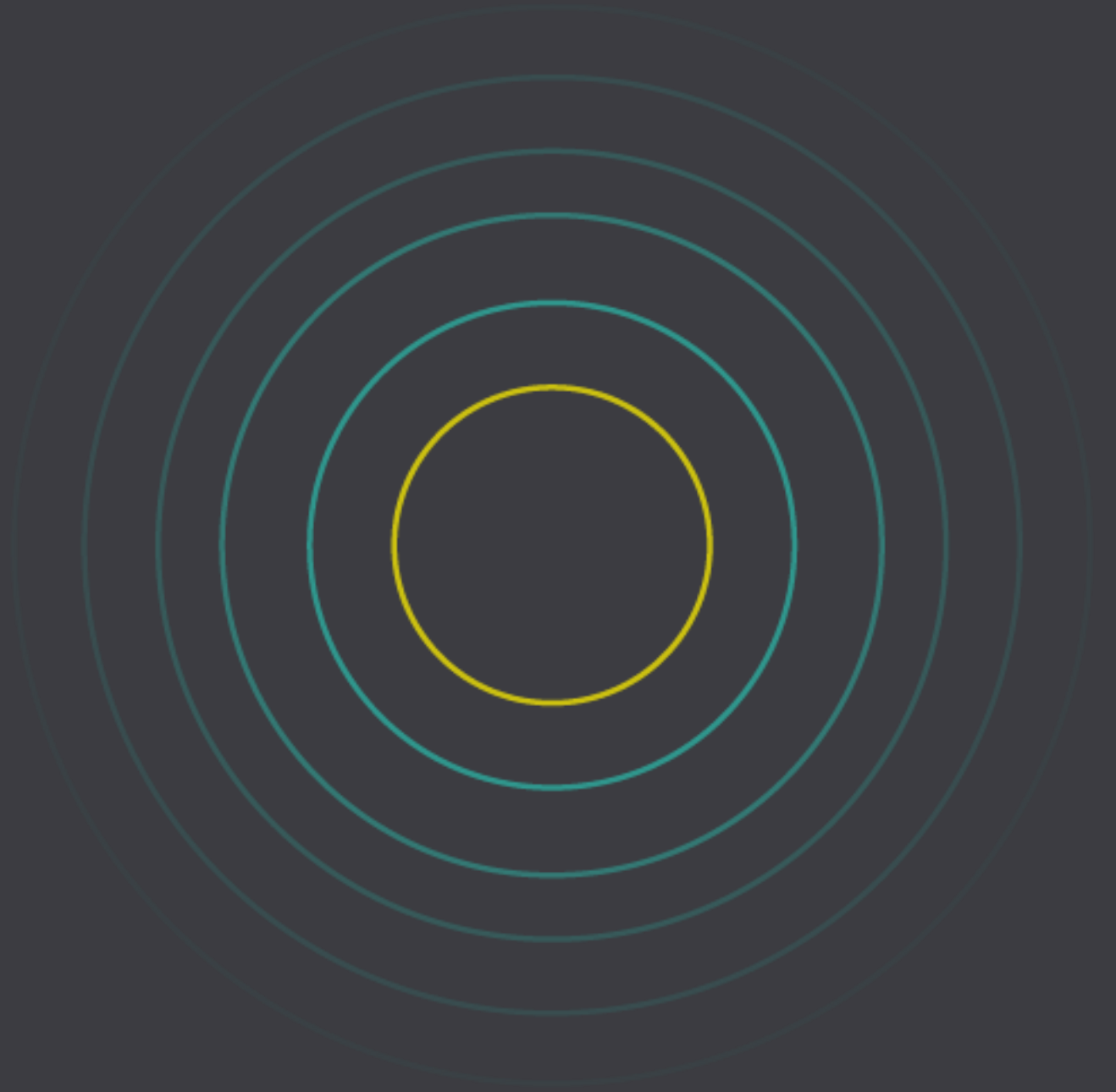
Concern	Answer
12 “Are shared folders supported with the App for Outlook as part of the delegate access feature?”	<p><i>Shared mailboxes are not supported for the App for Outlook, only user mailboxes are supported using <u>delegate access</u>.</i></p> <p><i>A shared mailbox (e.g. contact@contoso.com) is typically used as a shared repository of email requests that multiple people will interact with, we therefore would not typically see App for Outlook being the most applicable approach for use with shared mailboxes with Dynamics 365. We would instead recommend using the capabilities of Dynamics 365 to track and manage emails automatically into Dynamics 365 giving more consistency and control.</i></p> <p><i>Shared mailbox can be configured as <u>queues</u> in Dynamics 365 so that every email sent to that address gets into Dynamics 365 as an email record. These emails can then be picked up from the queue to be worked on by teams of users or even be automatically processed with features such as <u>Automatic Record Creation and Update</u> or <u>Automatic Case Creation Rules</u>.</i></p> <p><i>From Outlook, because shared mailboxes support server-side synchronization, <u>category tracking</u> can also be used to hand pick the items to synchronize.</i></p>
13 “Are shared mailboxes supported with the App for Outlook as part of the delegate access feature?”	<p><i>No, shared mailboxes are not supported. However, category tracking can be used to synchronize these items.</i></p> <p><i>Only user mailboxes are supported for <u>delegate access</u>.</i></p>

Frequently Asked Questions

Common concerns (5/5)

	Concern	Answer
14	<p>“Is there any impact to contacts that are already synchronized to Outlook when making this transition to avoid duplicates?”</p>	<p><i>Duplicates are in fact only possible in very specific edge scenarios, when you change both your Dynamics 365 environment (e.g. change of OrganizationId in an on-premise to online migration) and Exchange environment (e.g. in a migration from Exchange on-premise to Exchange online, or in a tenant move).</i></p> <p><i>In that case, items could indeed synchronize back from Dynamic 365 to Exchange as new records causing duplicates.</i></p> <p><i>To mitigate this, ahead of the move, you can configure <u>synchronization filters</u> and you can also move synchronized (tracked) items in Outlook in specific subfolders. When Server-Side Synchronization is enabled, items will be synchronized back to Outlook. You can find more information on Outlook synchronization in <u>these documents</u>.</i></p>
15	<p>“How to avoid duplicate appointments and meeting requests when changing Dynamics 365 organization (for example during an on-premise to online migration) while also transitioning from Outlook Synchronization to Server-Side Synchronization?”</p>	<p><i>For that specific scenario, configure <u>synchronization filters</u> so that only appointments scheduled after a specific date get synchronized.</i></p> <p><i>This prevents old items being synchronized and potentially creating duplicates. For customers just changing their synchronization method and not changing Dynamics 365 organizations, there shouldn't be much concerns for duplicates, but we advise to perform tests before globally rolling out to all users.</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>

Outlook integration and Server-Side Synchronization white papers

<https://www.microsoft.com/en-us/download/details.aspx?id=48718>

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>

Looking for additional help?

Do you have a Premier or Unified Support Contract?

- ✓ If so, contact your Technical Account Manager or Account Executive to get in touch with our Dynamics 365 Premier Field Engineering team for tailored assistance on this topic.

[See here for additional service offerings](#)

- ✓ If not, no worries: we have an outstanding [Dynamics 365](#) and [Power Apps](#) communities available giving you access to forums, help threads, and blogs.

If you are interested in Premier or Unified Support, see the link below:

<https://www.microsoft.com/en-us/industry/services/support>

Thank you!



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