



**Concentrix**  
a common centre

## Email Routing Options for Microsoft Dynamics CRM v4.0

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## Purpose

The purpose of this document is to provide high level information about the email routing options for [Microsoft Dynamics CRM](#).

There are three options for sending and receiving email using Microsoft Dynamics CRM 4.0.

- The Microsoft Dynamics CRM Email Router
- Forward mailbox
- The Microsoft Dynamics CRM Outlook client

Each scenario has advantages and disadvantages depending on varying deployment considerations. A particular deployment may favour one or a mixture of the above options.

Without utilising the Microsoft Dynamics CRM E-mail Router or the Microsoft Dynamics CRM Outlook client in a deployment, CRM will have no functioning e-mail capabilities.

This document is aimed at Microsoft Dynamics CRM project team members with either a technical or business interest in the solution. For a broader overview of the product, or for any other information about Microsoft Dynamics CRM, please [contact Concentrix](#).



## The Microsoft Dynamics CRM Email Router

This option requires the installation and setup of the CRM email router on a server or computer of choice. The E-mail Router provides centrally managed e-mail routing for users, queues, and forward mailboxes; it routes both incoming and outgoing messages and can be configured to connect with Microsoft Exchange or POP3 mailboxes to track e-mail into Microsoft Dynamics CRM 4.0.

The email router can be configured to either connect directly to a users individual mailbox to a 'sink' mailbox which is used for all or a group of users/queues collectively.

### Individual Mailbox

This method requires the creation of a secure user account in Active Directory that has privileges to access Microsoft Dynamics CRM, the Microsoft Exchange or POP3 email server and all users' inboxes and outboxes. The secure account searches for all emails that are sent and received from a user where the subject heading contains a tracking token: emails are then tracked in the CRM and are routed to their destination.

#### Advantages

- Can be used in deployments where the Microsoft Dynamics CRM Client for Outlook is not installed.
- Microsoft Dynamics CRM e-mail messages are sent asynchronously.
- Where a user sends an email through CRM when they are using the web client, the email will be sent automatically without the delay of waiting for that user to connect to CRM using Outlook.

#### Disadvantages

- For POP3 accounts, an incoming profile must be created for each POP3 account and a password entered for each POP3 account which adds complexity if there are a large number of users.
- If an incoming email is not tracked automatically or if there is an error with the router, the user will need to connect to CRM via Outlook to track the emails manually.

### Forward Mailbox

When forward mailbox monitoring is used; incoming messages are processed by Exchange or the POP3 server and the E-mail Router in the following sequence:

- A message is received by a CRM user on either the, Exchange Server or the POP3 server; the server then processes it by putting it in the Microsoft Dynamics CRM user's mailbox.
- A rule in the user's mailbox sends a copy of the message to the Microsoft Dynamics CRM forward mailbox.
- The E-mail Router retrieves the message from the Microsoft Dynamics CRM forward mailbox and sends it to the computer running Microsoft Dynamics CRM Server.

The forward mailbox relies on the e-mail provider having the ability to forward as an attachment. This is required in order to forward e-mails to a central mailbox that is monitored by the Microsoft Dynamics CRM E-mail Router.

#### Advantages

- Reduces the number of incoming profiles that must be created and managed for organizations that monitor a large number of user's mailboxes
- There is only one central mailbox that needs monitoring
- Microsoft Dynamics CRM e-mail messages are sent asynchronously.

#### Disadvantages

- A mailbox rule must be deployed to each user to forward e-mails to the central mailbox.



- For POP3 e-mail servers that support e-mail system rules where an e-mail message can be forwarded as an attachment, a rule must be created in Outlook that automatically forwards all CRM e-mail messages to the E-mail Router forward mailbox.
- No control over which emails are tracked in CRM: all emails sent via the web client are tracked automatically



## Microsoft Dynamics CRM for Outlook

Microsoft Dynamics CRM for Microsoft Office Outlook provides e-mail routing capabilities on a single user basis. This option requires the installation of the Microsoft Dynamics CRM for Outlook plug-in on each client machine that needs to send and receive email that is tracked in the CRM.

Emails that are sent via the web client will not be sent; and emails not received; unless Microsoft Outlook is running. All emails are downloaded to Microsoft Outlook before being routed to their destination.

This option does not require the E-mail Router, and is usually the better option for smaller organisations that do not have full-time IT staff or the necessary resources to manage and maintain email router deployment.

### Advantages

- The Microsoft Dynamics CRM Client for Outlook is able to send e-mail for each user whether the user sends it from within Outlook or within the CRM Web Client, as well as receive and track e-mail in Microsoft Dynamics CRM 4.0.
- A user can specify which emails to track and which emails not to track
- There are no user passwords to maintain for access to Microsoft Dynamics CRM 4.0 or to the user's mailboxes.
- Does not require any specialist knowledge or access to any servers.

### Disadvantages

- The Microsoft Dynamics CRM Client for Outlook must be running for e-mails to be sent or tracked in Microsoft Dynamics CRM. If the Microsoft Dynamics CRM Client for Outlook is not running, the e-mails will be queued until Outlook is launched and connects to the Microsoft Dynamics CRM server and to the mail server.
- This scenario cannot be used for Queues created in Microsoft Dynamics CRM 4.0.
- For sending emails, it downloads all of the individual emails to the local outlook client before sending them: this can be cumbersome and resource intensive when processing a large number of emails.



## **Automatic Email Tracking Options**

Providing that an automatic method of email tracking is selected and functioning, within their preferences each user can select which emails will be automatically tracked.

One of three options can be selected:

- All email messages
  - All emails sent from the web client or Microsoft Outlook will be automatically tracked as an activity in CRM.
- Email messages in response to CRM email
- Email messages from CRM Leads, Contacts and Accounts



## Security

If the email router is used there is some additional security that must be implemented.

### Email Router Server

Irrelevant of the email routing options, the PC or Server on which the CRM Email Router is installed will need to be added to the Active Directory Security Group: 'PrivUserGroup {CRM Organisation GUID}'<sup>1</sup> (this is a group that is created when Microsoft Dynamics CRM is installed).

### Processing User

It is usual for the CRM Email Router to use a specified Active Directory User Account to authenticate to exchange to access the relevant mailboxes. Typically a user called 'CRM Mailbox' (Domain\CRMMailbox) would be created and used.

This user will need to be added to the following Active Directory Security Groups:

- UserGroup {CRM Organisation GUID}<sup>2</sup>
- PrivUserGroup {CRM Organisation GUID}<sup>3</sup>
- SQLAccessGroup {CRM Organisation GUID}<sup>4</sup>

### Sink Mailbox

Where the sink mailbox option is in use, the user would need to have an Exchange Mailbox.

### Direct Mailbox Access or Direct Relay to Exchange SMTP

Where the option to have the CRM Email Router connect directly to each users' mailbox is used or where the email router is set to relay directly to Exchange SMTP, the following security permissions will need to be configured for the user.

- Add the user as a Local Administrator on the Exchange Server.
- Add the user as an 'Exchange Administrator' (does not need to be 'Exchange Full Administrator').

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<sup>1</sup> This security group is created in Active Directory as part of the install of Microsoft Dynamics CRM

<sup>2</sup> This security group is created in Active Directory as part of the install of Microsoft Dynamics CRM

<sup>3</sup> This security group is created in Active Directory as part of the install of Microsoft Dynamics CRM

<sup>4</sup> This security group is created in Active Directory as part of the install of Microsoft Dynamics CRM



## About Concentrix

Founded in 1999, Concentrix is a leading UK independent CRM specialist, providing quality business solutions to companies throughout the UK.

Concentrix implements [CRM software](#), systems and business solutions that are right for their customers' business requirements: matching their needs, goals and budget. Concentrix works across a wide variety of industry sectors with clients ranging from small companies with a handful of CRM system users, right up to household-name PLCs with hundreds of users on multiple sites.

Concentrix takes a 'product agnostic' approach to delivering CRM solutions to their clients. So, as well as Microsoft Dynamics CRM (which included [hosted Microsoft Dynamics CRM](#) as well as on-premise deployment) Concentrix offers a range of other CRM software solutions including [Sage CRM](#), Sage [SalesLogix](#), and FrontRange's [GoldMine](#).

Concentrix is a Microsoft Gold Certified Partner, a fully Accredited Sage Business Partner and a FrontRange Premier Partner.

Concentrix is based in Mountsorrel, Leicestershire and has satellite offices in Bristol and in central London. For further information about the information provided within this document, or any other products or services provided by Concentrix, please [contact Concentrix](#).



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