



Concentrix
a common centre

Microsoft Dynamics CRM v4 Email Tracking and Activity Synchronisation

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Purpose

The purpose of this document is to provide information about the email tracking and activity synchronisation for [Microsoft Dynamics CRM](#).

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](#).



Activity and Contact Synchronisation

The following two way synchronisations can occur between the Microsoft Dynamics CRM Server and the Microsoft Dynamics CRM for Outlook Client.

In all of the cases in the table below, the synchronisation is between Microsoft Dynamics CRM and Microsoft Outlook (through use of the Microsoft Dynamics CRM for Outlook Client).

Exchange level synchronisation cannot be achieved for the entities below without a third party tool.

CRM Entity	Outlook	Created in CRM*	Created in Outlook**
Contact	Contact	Contacts matching criteria in users Local Data settings will be created as Outlook Contacts	Contacts that have been marked as 'Track in CRM'.
Appointment	Appointment	Will be created as outlook appointments if the user is the organiser or an attendee.***	Appointments that have been marked as 'Track in CRM'
Email	Email	See Email Routing.	See Email Routing
Fax	Task	If the user owns the Fax.	Tasks that have been marked as 'Track in CRM'
Letter	Task	If the user owns the Letter.	Tasks that have been marked as 'Track in CRM'
Task	Task	If the user owns the Task.	Tasks that have been marked as 'Track in CRM'

* **Created in CRM:** Explains which records, when created in CRM, will appear in a user's Outlook.

** **Created in Outlook:** Explains the scenarios through which a record created in Outlook will appear in CRM.

*** If Outlook is connected to Exchange, once the appointment has been loaded into one user's Exchange Calendar, the appointment will be visible in all applicable users Exchange Calendars (and therefore also their Outlook Calendars), even if they haven't synchronised their Outlook with Microsoft Dynamics CRM.



Address Book

Dependant on a user's CRM security role and their CRM settings, a number of new outlook address books should be made available. These are only accessible via Outlook when Microsoft Dynamics CRM for Outlook is installed and configured. Subsequently, these address books are not visible through Outlook Web Access (OWA).

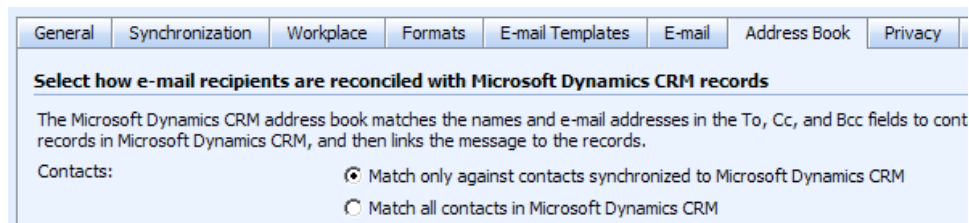
The address books which are made available are:

- CRM Accounts
- CRM Contacts
- CRM Facilities/Equipment
- CRM Leads
- CRM Queues
- CRM Users

Subject to the number of records in CRM the initial population of the Address Books may take a considerable amount of time and additionally the user's settings will affect what records are presented.

Records will only be presented in an Outlook Address book if they have a primary email address (emailaddress1).

The settings page is displayed below:



Contacts

'Match only against contacts synchronised to Microsoft Dynamics CRM'

If a user does not have any contacts synchronising between CRM and Outlook no contacts will appear in the Contact CRM Address Book.

'Match all contacts in Microsoft Dynamics CRM'

All contacts that the user has permission to see will be synchronised to the Contact CRM Address Book.



Email Routing

Inbound Emails

There are a number of options for processing and tracking inbound emails in Microsoft Dynamics CRM:

- Microsoft Dynamics CRM Email Router
- Forward Mailbox
- Microsoft Dynamics CRM for Outlook
- None

In all cases, whether or not an email is successfully tracked in Microsoft Dynamics CRM will depend on two things:

1. The ability of CRM to track the email (see Email Tracking: Failure)
2. The users automatic tracking options (see Automatic Email Tracking Options)

There is also the option for a user to manually track an email from any folder within their Mailbox providing that they have Microsoft Dynamics CRM for Outlook installed.

Microsoft Dynamics CRM Email Router

The Email Router directly polls the appropriate users' exchange mailbox and attempts to promote all emails within the Inbox to Microsoft Dynamics CRM subject to the rules above.

This option means that emails are potentially promoted to CRM soon after they arrive in the relevant mailbox and that there is no dependency on the email being downloaded to Outlook.

Further information is provided below under Email Routing Options.

Forward Mailbox

An exchange server level rule must be deployed to each user's or queue's mailbox which automatically forwards a received email, as an attachment, to a CRM Monitored mailbox.

The email router polls the mailbox and attempts to promote all emails within the inbox to Microsoft Dynamics CRM subject to the rules above.

This option means that emails are potentially promoted to CRM soon after they arrive in the relevant mailbox and that there is no dependency on the email being downloaded to Outlook.

Further information is provided below under Email Routing Options.

Microsoft Dynamics CRM for Outlook

When an email is downloaded to the user's mailbox within outlook, and if Microsoft Dynamics CRM for Outlook is installed, the CRM for Outlook application will attempt to promote the email to Microsoft Dynamics CRM subject to the above rules.

Further information is provided below under Email Routing Options.

Outbound Emails

There are two methods of sending emails which are tracked in Microsoft Dynamics CRM:

- Microsoft Office Outlook
- Microsoft Dynamics CRM

Microsoft Office Outlook

It is possible for standard Microsoft Office Outlook functionality to be used to send emails.

If Microsoft Dynamics CRM for Outlook is configured for a user on a particular computer they will have the option to mark that an email should be tracked when it is sent.

Alternatively emails can be manually tracked retrospectively from the 'Sent Items' folder of a users' mailbox.

E.g. A user using Outlook Web Access may send an email to a customer, but as there is no Dynamics CRM for the Outlook Web Access client, this email would not be tracked in CRM. When the user next connects to CRM using Microsoft Dynamics CRM for Outlook, they would be able to select the emails from their Sent Item and track them at this time.



Microsoft Dynamics CRM

It is possible to generate emails directly through the Microsoft Dynamics CRM interface in a number of ways including:

- Direct Emails
- Automated Emails (Workflow)
- Marketing Communications

By definition, all emails created within CRM are tracked within CRM however the route by which the email will actually be submitted to the SMTP server for sending is based on the setting for that user or queue.

It is important to note that when an email is 'Sent' in CRM is it marked as complete with a status reason of 'Pending Send' until it has actually been submitted to the application responsible for actually sending it.

The three main options for outgoing email are:

- Microsoft Dynamics CRM Email Router
- Microsoft Dynamics CRM for Outlook
- None

Microsoft Dynamics CRM Email Router

The email router will poll CRM for the emails that it has the responsibility for sending and will process them in an asynchronous manner.

This uses server side processing and typically will mean that the outgoing email will not be displayed within that that users' 'Sent Items' folder in Outlook.

Further information is provided below under Email Routing Options.

Microsoft Dynamics CRM for Outlook

When the user's Microsoft Dynamics CRM for Outlook next synchronises with Microsoft Dynamics CRM (default is every 15 minutes) the email will be downloaded to the user's 'Outbox' within Outlook. Outlook will then process this as a standard email and once sent the email should be displayed under the users 'Sent Items'.

Ultimately this means that the user may believe that they have sent an email but it will not actually be sent until they synchronise their Outlook with CRM. Additionally if a user or queue is sending a large number of emails there may be a significant amount of information downloaded to Outlook as part of the synchronisation.

Further information is provided below under Email Routing Options.



Email Routing Options (Advanced)

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

- Microsoft Dynamics CRM Email Router
- Forward Mailbox
- Microsoft Dynamics CRM Outlook client

The method used for processing inbound and outbound emails is configured by CRM User or CRM Queue.

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

CRM will have no email capabilities if both of the following scenarios are true of a particular deployment:

- The Microsoft Dynamics CRM Email Router is not configured to handle incoming or outgoing emails.
- Microsoft Dynamics CRM for outlook is not configured for any users.

The Microsoft Dynamics CRM Email Router

The Microsoft Dynamics CRM Email Router is a standalone application which is capable of handling incoming and outgoing emails.

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 or to a 'sink' (or Forward) 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.
- 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 and synchronise with CRM using Microsoft Dynamics CRM for Outlook.
- For Exchange Mailboxes, an incoming profile can be created which will automatically process emails for new users as they are added. (Subject to security configurations).

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 only get visibility of the emails which have not tracked when viewing the emails through Microsoft Dynamics CRM for Outlook.

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.

Typically the Forward Mailbox option would be used for incoming queues such as sales@, support@, marketing@.

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.
- Easy visibility of the emails that were not successfully tracked.
- 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 unless Microsoft Dynamics CRM for 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 organisations that do not have full-time IT staff or the necessary resources to manage and maintain an 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.

Email Routing Security

If the email router is used there are some additional security measures 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}'¹ (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}²
- PrivUserGroup {CRM Organisation GUID}³
- SQLAccessGroup {CRM Organisation GUID}⁴

Sink Mailbox

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

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

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

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

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



Direct Mailbox Access or Direct Relay to Exchange SMTP

Where the option to have the CRM Email Router connect directly to each user's 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').



Email Tracking

When an email is tracked in Microsoft Dynamics CRM, a copy of the email is created within CRM and this will include all of the email content as well as any attachments.

The email will be linked to relevant parties based on an email address match against Leads, Accounts, Contacts, Queues, and Users. If an email is matched against multiple records, all of the relevant records will appear to be linked to that email.

E.g. if there is a lead, contact and user all with the same email address of `firstname.lastname@mycompany.co.uk` and if an email is tracked 'to' `firstname.lastname@mycompany.co.uk`, when that email is viewed in CRM it will look as if it was sent to all three people.

Where an email address cannot be resolved against CRM records, the email address will be highlighted in red and remain underlined.

It is possible to get a list of all emails with unresolved email addresses:

Workplace -> Activities ->

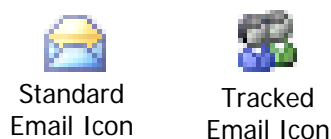
Filter: Type = Email; Filter: View = My Received Emails with Unresolved Sender

Regarding Field

If an email can be identified as being in response to a previously tracked email, CRM will automatically link the email currently being tracked to the same record through use of the 'regarding' field. Typically this identification is handled through use of the CRM Tracking Token.

Outlook Icon

There is an icon that may appear next to tracked emails when a user views their emails through Outlook where Microsoft Dynamics CRM for Outlook is installed.



This icon will replace the standard 'envelope' based on the users CRM for Outlook preferences and subject to the following conditions:

- The user tracked the email using Microsoft Dynamics CRM for Outlook.
- OR
- The email was tracked and Microsoft Exchange is used for mailbox storage.
 - When an email is tracked in CRM the ExchangeID of the original email is also stored and this allows CRM to recognise the same email, even though it may appear in different user's mailboxes.

Example

An email is sent to Roger Peacock and Kevin Whittingham and Roger manually tracks the email. This will create the email in CRM and mark the email within Roger's mailbox with the new icon. When Kevin accesses his mailbox through Outlook, CRM will identify that the email in his inbox was tracked by Roger (based on the exchange id) and mark it as tracked.

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
- Email messages in response to CRM email
- Email messages from CRM Leads, Contacts and Accounts

Internal Emails

It is important to consider which of the above options will result in internal emails being automatically tracked:

All Email Messages

All emails, including internal emails will be processed by CRM to be tracked.

Email messages in response to CRM email

If a user receives an internal email that responds to one that was tracked in CRM (possibly generated by workflow), the response will be processed by CRM to be tracked.

Email messages from CRM Leads, Contacts and Accounts

Internal emails will not be automatically tracked.



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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