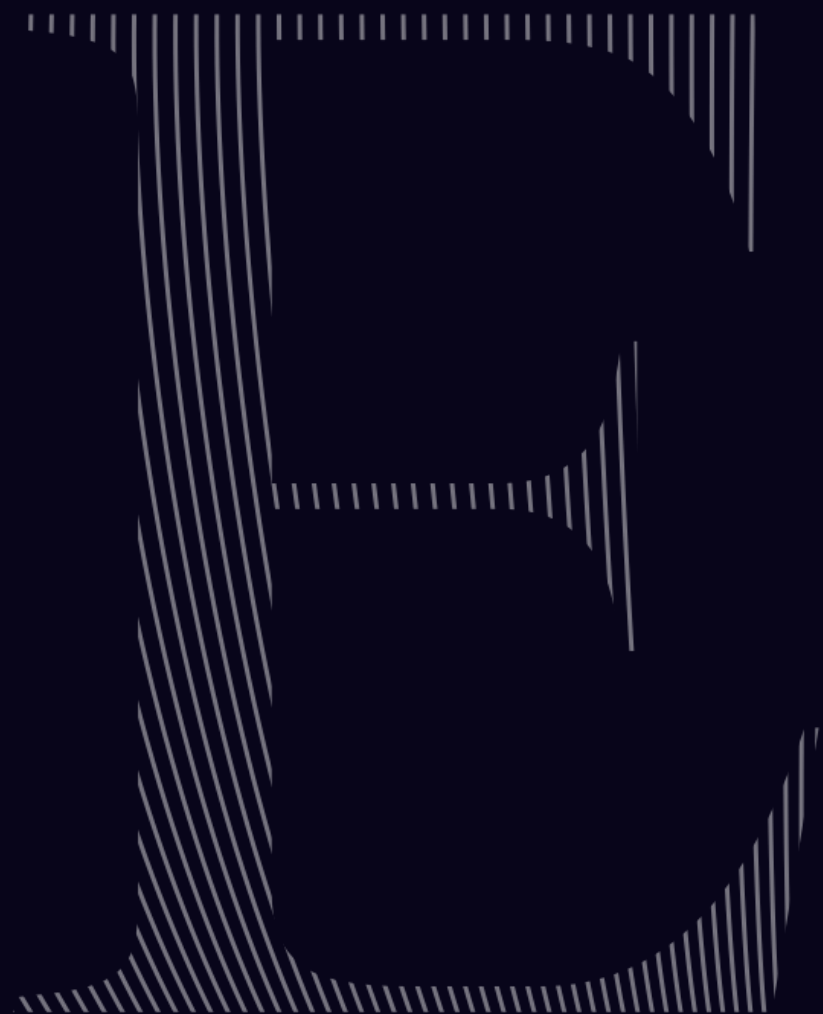




Starting Point Series





Email Management Using Microsoft 365

Today's Topics

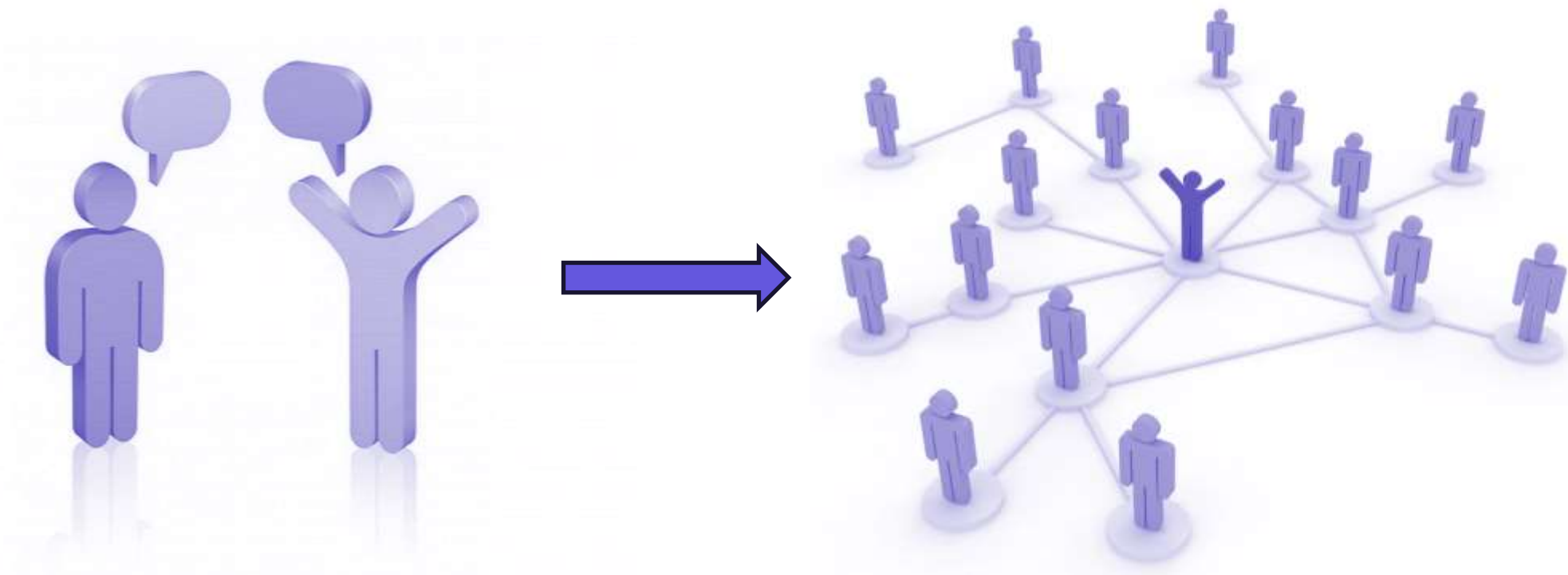


- Email Integration – The What & Why
- Microsoft 365 Integration
 - Email
 - Calendar
- Sending an Email from the CRM

“Capture”



The What and the Why



Microsoft 365

Conditions to be Met

Andrews - George & Sally

PERSON

RECORD ID

2

SERVICE LEVEL

Platinum

ADVISOR 1

Tricia Cameron

ADVISOR 2

John Henry

CSR

Cheryl Addison

PHONE

(555) 555-0000

HOME EMAIL

home@net.net

HOME ADDRESS

25 Andrews Drive
Oaks, CA 94555
USA

CLASSIFICATIONS

CENTER O...

CLIENT

TRUSTEE

TAGS

FINANCIAL...

ESTATE PL...

HOLIDAY G...

+2

AUM

\$13,614,954.66

FEE SCHEDULE

.75

CLIENT ANNIVERSARY

09/01/1995

OWNER GROUP

Everyone

George

MR. GEORGE ANDREWS

DATE OF BIRTH

01/19/1950

AGE

71.8

SSN

-**-*

HOME ADDRESS

25 Andrews Drive
Oaks, CA 94555
USA

HOME PHONE

(555) 555-5555 x

HOME EMAIL

george@email.net

COMMUNICATION PREFERENCE

Email

INTEGRATIONS

Constant Contact
ACTIVE

Sally

MRS. SALLY ANDREWS

DATE OF BIRTH

05/25/1955

AGE

66.5

SSN

-**-*

HOME ADDRESS

25 Andrews Drive
Oaks, CA 94555
USA

CELL PHONE

(555) 780-7687 x

BUSINESS EMAIL

sandrews@andrewstools...

COMMUNICATION PREFERENCE

Email

INTEGRATIONS

Constant Contact
ACTIVE

Client or Email

Email Addresses					
Type:	Email:	Label:	Belongs To:	Primary:	Add'l: ⓘ
Home	home@net.net		Andrews - George & Sally	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Home	george@email.net	George Home	George Andrews	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business	gandrews@andrewstools.com	George Work	George Andrews	<input type="checkbox"/>	<input type="checkbox"/>
Business	sandrews@andrewstools.com		Sally Andrews	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Home	sally@email.net	Sally Home	Sally Andrews	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Last 20 Records

Last 20 Actions

Records

Prospects

Actions

Opportunities

Assets

Insurance

Dashboards

Report Assistant

Email Mgmt

Correspond

Calendar

Documents

Workflow

Integrations


Settings

Import

Firm Profile

FIRM INFORMATION

FIRM PREFERENCES

Category	Name	Setting	Edit
AppSettings	Absolute Action Lock		Setup
	Display Address Map	<input type="checkbox"/>	
	Display "Complete without Note" Button on Action Forms	<input checked="" type="checkbox"/>	
	Display Time on Action Entered and Completed Dates	<input checked="" type="checkbox"/>	
	Inactivity Auto Logoff	 8 hours	
	Report Customization		Setup
Audit Log	Standard Action Form Features		Setup
Database Export	Provider Selection	Junxure	
Feature Security	Provider Setup	Office365	Setup
Firm Profile	Save Embedded Images	<input type="checkbox"/>	
List Maintenance	Encrypt Attachment Option	<input checked="" type="checkbox"/>	
Login Security	Email Subject Appends to Action Subject on Capture	<input checked="" type="checkbox"/>	
Record Layout Configuration	Laserfiche		Setup
Service Monitor	Orion Options		Setup
User Defined Fields	Schwab OpenView Gateway™ SAC Alert - Junxure Cloud Workflow		Setup
User Group Management	MoneyGuidePro Setup	<input type="checkbox"/>	Setup
User Profiles	TD Ameritrade Institutional® Alert - Junxure Cloud Workflow		Setup
Web Forms	Constant Contact	Disable Constant Contact Integration	Setup
	MyRepChat		Setup

Email Options

The screenshot shows the 'Microsoft 365 Configuration' dialog box, which is a modal window used for configuring email and contact synchronization. The dialog is overlaid on a background interface that includes a 'NAME & DETAILS' table, a 'Record Search' bar, and 'USER PREFERENCES' and 'PASSWORD' tabs. The dialog itself has a title bar with a close button and a main title 'Microsoft 365 Configuration'. It contains several sections: 'Automatic Email Capturing' with radio buttons for 'on' and 'off'; 'Add Action' with a checked checkbox; 'Email Action Templates' with dropdown menus for 'Action Template for Received Email' and 'Action Template for Sent Email'; 'Automatic Contact Sync' with radio buttons for 'on' and 'off'; and 'Default sync settings' with a list of default values for Office, Owner Group, Editor Group, classification, and Tag. At the bottom, there is a 'Select Contact Folder' dropdown and a warning message: 'Hitting Ok will start contact sync between Microsoft 365 and Junxure'. The dialog has 'Cancel' and 'Ok' buttons at the bottom right.

Microsoft 365 Configuration

Automatic Email Capturing
☒ on ☐ off

☒ **Add Action**

Email Action Templates

Action Template for Received Email: Email ▼

Action Template for Sent Email: Email ▼

Automatic Contact Sync
☐ on ☒ off

Default sync settings

Default Office	Default Office ▼
Default Owner Group	Administrators ▼
Default Editor Group	Administrators ▼
Default classification	Center of Influence ▼
Default Tag	401k ▼

Select Contact Folder: ▼ ¹

Hitting Ok will start contact sync between Microsoft 365 and Junxure

Will I get a Pending Action?

[Back to Workflow List](#)

Be sure to click Save Template to keep your changes [X Delete Template](#)

Workflow Setup and Edit

Workflow Category *	Actions General	Status *	Active	Last Edited By	Haas, John
Workflow Name *	Email Required	Owner	Haas, John	Last Review	
Workflow Description/Trigger				<input type="checkbox"/> First Step completes automatically on add	

Summary

Assigned : <Employee Creating Action> **Type**: Email

Subject :

Notes *

Formats

B *I*

A **A** Font Sizes

Type *

Email

Category

Select an Option

Tags

Select Some Options

☒ Action Required

Assigned *

<Employee Creatin... X

Priority

Select an...

Days Until Due:

FYI on Save

☐ i

Select Group

Select Group to FYI

Viewing

All

☐ Adv 1

☐ Adv 2

☐ CSR

☐ Cochrane, Julie

☐ Graeber, Chris

☐ Haas, John

☐ Operations, Queue -

Cancel

Save

Standard

Detailed

Interacting with email using 365

- Last 20 Records
- Last 20 Actions
- Records
- Prospects
- Actions
- Opportunities
- Assets
- Insurance
- Dashboards
- Report Assistant
- Email Mgmt
- Correspond
- Calendar
- Documents
- Workflow
- Integrations
- Settings
- Import

Actions

7 My Past Due and Due Today Actions

8 My Pending Actions

Last 20 Actions

Opportunities

5 Open Opportunities

8 My Opportunities

Last 20 Opportunities

Assets

Last 20 Assets

Records

Last 20 Records

Insurance

Dashboards

ORION

Report Assistant

Correspond

Document Workspace

Workflow Monitor

Multi-record Emails

Correspondence History

Document Templates

Workflow Setup

Interacting with email using 365

Email Folders

- Inbox
- Saved
- Sent Items

Tools

Search All Items

	UIActionID	UIRecordID	Received On	Sent On	To	From	CC	Subject	Attachments
⋮	<input type="checkbox"/>		10/12/2021		clss@net.com	MicrosoftExchange329e71ec88ae...		Undelivera...	<input type="checkbox"/>
⋮	<input type="checkbox"/>		9/30/2021		mrobinson@yahoos.com	MicrosoftExchange329e71ec88ae...		Undelivera...	<input type="checkbox"/>
⋮	<input type="checkbox"/>		9/30/2021		Lzim70@hotmailing.com	MicrosoftExchange329e71ec88ae...		Undelivera...	<input type="checkbox"/>
⋮	<input type="checkbox"/>		9/30/2021		dp4532@oitnb.com	MicrosoftExchange329e71ec88ae...		Undelivera...	<input type="checkbox"/>
⋮	<input type="checkbox"/>		9/30/2021		fixyourheart@ppth.org	MicrosoftExchange329e71ec88ae...		Undelivera...	<input type="checkbox"/>
⋮	<input type="checkbox"/>		9/30/2021		iraisecows@email.net	MicrosoftExchange329e71ec88ae...		Undelivera...	<input type="checkbox"/>
⋮	<input type="checkbox"/>		9/30/2021		mike@net.net	MicrosoftExchange329e71ec88ae...		Undelivera...	<input type="checkbox"/>
⋮	<input type="checkbox"/>		9/30/2021		sam@net.net	MicrosoftExchange329e71ec88ae...		Undelivera...	<input type="checkbox"/>
⋮	<input type="checkbox"/>		9/30/2021		Testtube@net.net	MicrosoftExchange329e71ec88ae...		Undelivera...	<input type="checkbox"/>
⋮	<input type="checkbox"/>		9/30/2021		surferboy5@gmailing.com	MicrosoftExchange329e71ec88ae...		Undelivera...	<input type="checkbox"/>

Auto Sync

Attach to an Existing Action

Link to a Record

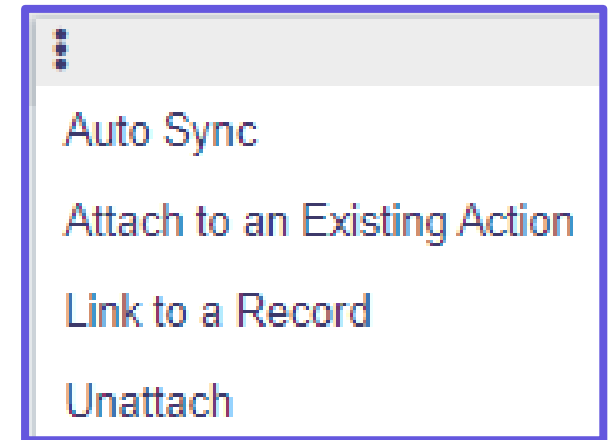
Unattach

1 2 3 4 5 6 7 8 9 10 ... > >>

Displaying items 1 - 10 of 398 10

- Auto-match to a Record & Capture *
- Link to an existing Action
- Capture to a specific Record *
- Unattach Emails

*This may or may not include an Action



Calendar – From CRM to Outlook

Status: IncompleteAssigned : Cameron, TriciaType: MeetingID: 1294

SubjectSM - Meeting

Linked: AssetsDocumentsEmailsInsuranceOpportunitiesUser Defined FieldsCalendar

Notes: *

Notes saved less than a minute ago

Time Set: 2:00 PM EST

Location: Google Meeting link- Video call link: <https://meet.google.com/cnn-tijo-yxx>

Type of Meeting - Annual Review

Notes:

Complete Service to schedule next interval

Add Relevant Tags

Entered By * : Cameron, Tricia

Created * : 11/08/2021 4:03 PM

Time Spent : Minutes

Type * : Meeting

Category : Meetings

Tags : Select Some Options

☒ Action Required

Assigned * : Cameron, Tricia

Priority : Time S...

Start Date :

Due Date * : 12/16/2021

☐ Completed

FYI on Save : ☐

Select Group : Select Group to FYI

Viewing : All

☐ Adv 1

☐ Adv 2

☐ CSR

☐ Addison, Cheryl

☐ Cameron, Tricia

☐ Hare, Josh

☐ Henry, John

Service Monitor:

☐ Client Touch | Due: 11/05/22

☐ Meeting | Due: 11/19/21

☐ Special Interest Article | Due: 06/29/21

Cancel

Save

Calendar – From CRM to Outlook

Appointment

Van Pelt - Schroeder

Title
SM - Meeting

Location

Description
Time Set: 2:00 PM EST Location: Google Meeting link-
Video call link: <https://meet.google.com/cnn-tijo-yxx>

Start
12/16/2021 2:00 PM

End
12/16/2021 3:00 PM

☐ All day ☐ Recurring

Calendar View: Today | Sun 28 | Mon 29 | Fri 2 | Sat 3 | 4 | 9 | 10 | 11 | 16 | 17 | 18 | 23 | 24 | 25 | 26 | 27 | 30 | 31

Buttons: Close, Return To Action, Cancel, Delete, Save

Setup Email using Microsoft 365

NAME & DETAILS		CONTACT INFORMATION	USER PREFERENCES	PASSWORD
Category	Name	Setting	<input type="button" value="X Cancel"/> <input type="button" value="✓ Save"/>	
Alerts	Alert Popup Reminder	<input type="checkbox"/>		
Document Management	Document Management Setup		<input type="button" value="Setup"/>	
Email Configuration	Calendar Setup			
	Email Signature	<input checked="" type="checkbox"/>		
	Inbox Routing Rules			
	Microsoft 365 Configuration			
Integrations	Docupace	<input type="checkbox"/>		
	Envestnet	<input type="checkbox"/>		
	Orion User Setup			
	Schwab Advisor Center®	<input type="checkbox"/>		
	SEI SSO	<input type="checkbox"/>		
	TD Ameritrade	<input type="checkbox"/>		
	Laser App	<input type="checkbox"/>		
	Citrix ShareFile	<input checked="" type="checkbox"/>		
	Riskalyze	Enable Riskalyze Integration		
	Constant Contact Integration	<input checked="" type="checkbox"/>		
	Calendly		<input type="button" value="Setup"/>	
	Schwab OpenView Gateway™	Enroll		
	Microsoft 365 (Online) Outlook (Url for Microsoft 365 Addin Setup)	<input checked="" type="checkbox"/>	<input type="button" value="Setup"/>	
Prospect Defaults	Promote to Record Default Values		<input type="button" value="Setup"/>	

How to Setup the Add-in in Outlook Online

Copy this Url to your clipboard: <https://www.junxurecloud.com/Public/Office365/JunxureForOutlookAddin.xml>



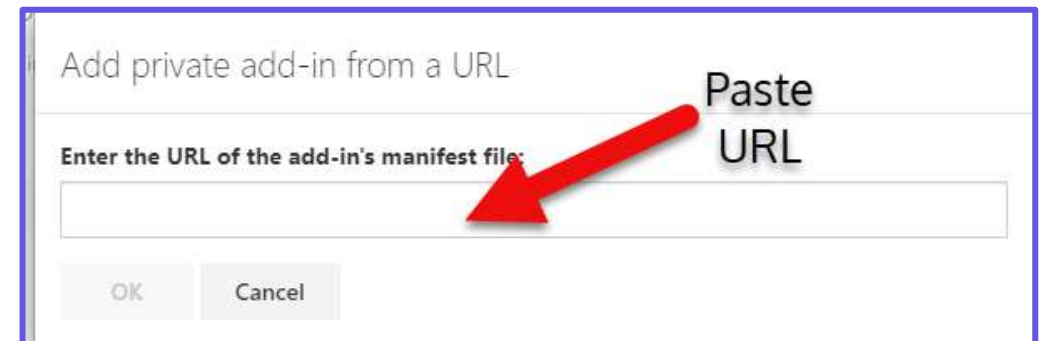
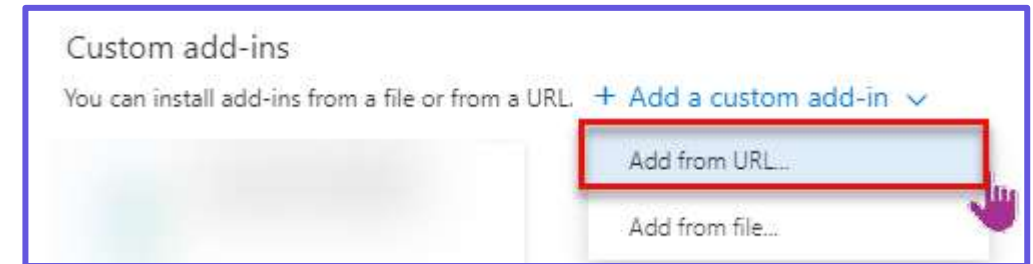
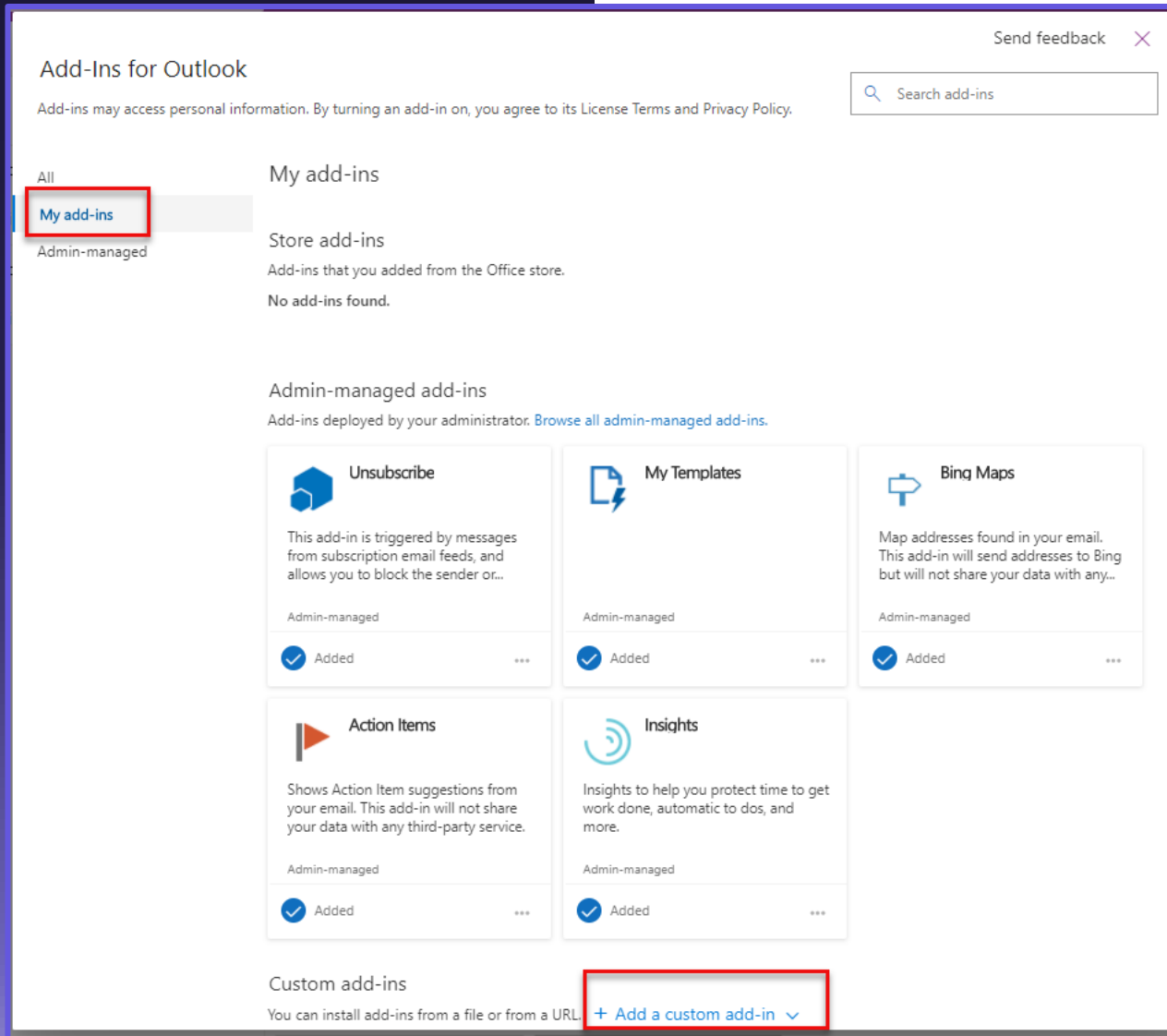
Choose from below to get instructions on how to setup the Outlook Add-in if you are an Outlook Administrator (who can setup the Add-in for everyone) or an Outlook user (only able to setup the Add-in just for yourself)

☐ Outlook Administrator ☒ Outlook User

1. In Office 365 create a new message or reply to an existing message.
2. At the bottom of the page, select More actions and then select Get Add-ins.
3. Select My add-ins.
4. Go to the bottom of the page to Custom add-ins.
5. Select Add a custom add-in and select Add from URL.
6. Copy and paste the URL above to add the add-in your Office 365 account.

For additional help see: [Publish Office Add-ins using Centralized Deployment via the Office 365 admin center.](#)

Setup Email using Microsoft 365



Sending Email from CRM

Status: IncompleteAssigned : Cameron, TriciaType: MeetingID: 1294

Subject : SM - Meeting

Linked: AssetsDocumentsEmailsInsuranceOpportunitiesUser Defined FieldsCalendar

Notes:*

Notes saved less than a minute ago

I_x

↶↷

Formats ▾

B

I

≡≡≡≡

☰☷☹☹

☰☷☹☹

A ▾A ▾12pt ▾

↕↕

Time Set: 2:00 PM EST

Location: Google Meeting link- Video call link: https://meet.google.com/cnn-tijo-yxx

Type of Meeting - Annual Review

Notes:

Complete Service to schedule next interval

Add Relevant Tags

Entered By * : Cameron, Tricia × ▾

Created * : 11/08/2021 4:03 PM ▾

Time Spent : Minutes

Type * : Meeting × ▾

Category : Meetings × ▾

Tags : Select Some Options

☒ Action Required

Assigned * : Cameron, Tricia × ▾

Priority : Time S... × ▾

Start Date :

Due Date * : 12/16/2021

☐ Completed

FYI on Save : ☐ ⓘ

Select Group : Select Group to FYI ▾

Viewing : All ▾

☐ Adv 1

☐ Adv 2

☐ CSR

☐ Addison, Cheryl

☐ Cameron, Tricia

☐ Hare, Josh

☐ Henry, John

Service Monitor: ⓘ

☐ Client Touch | Due: 11/05/22

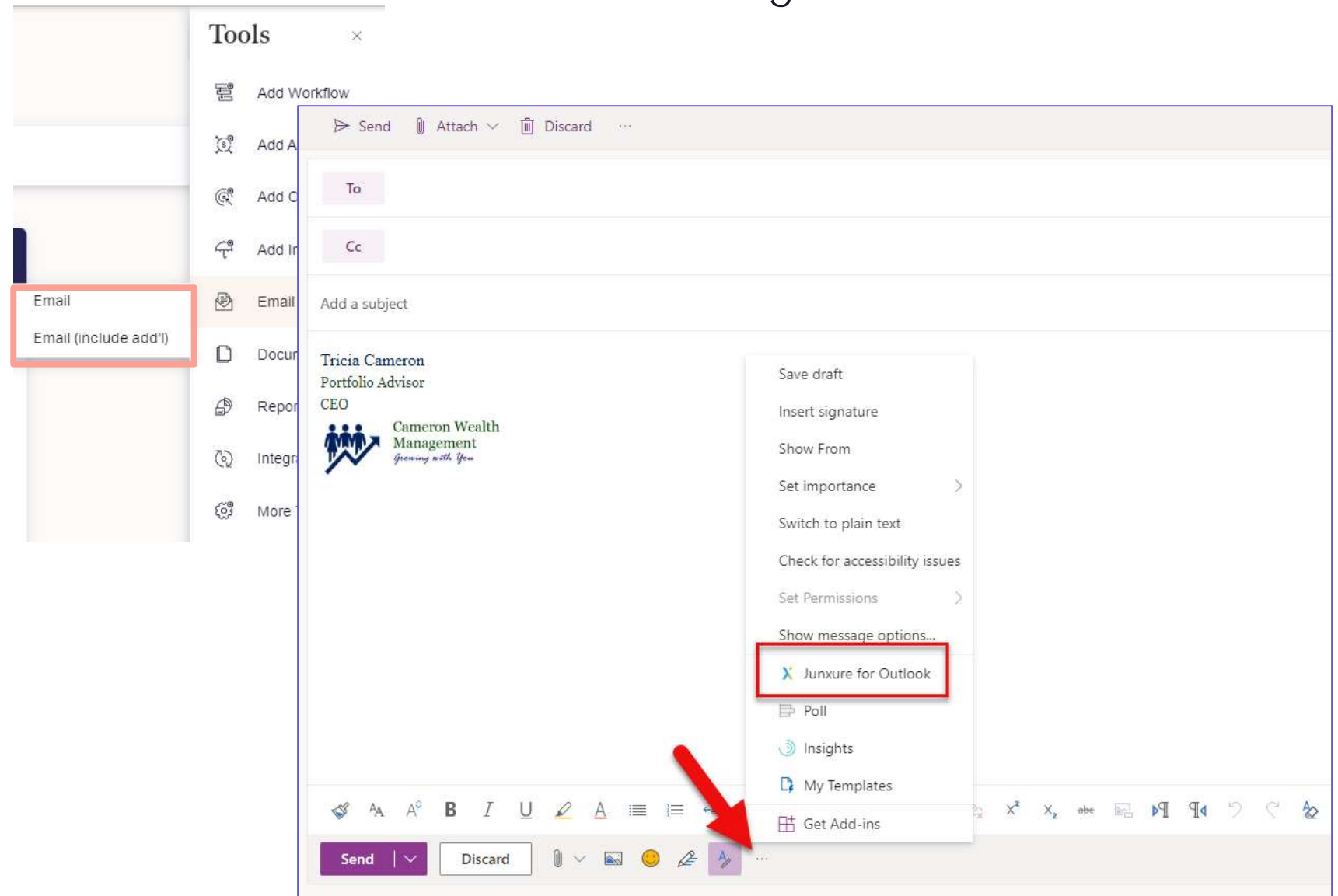
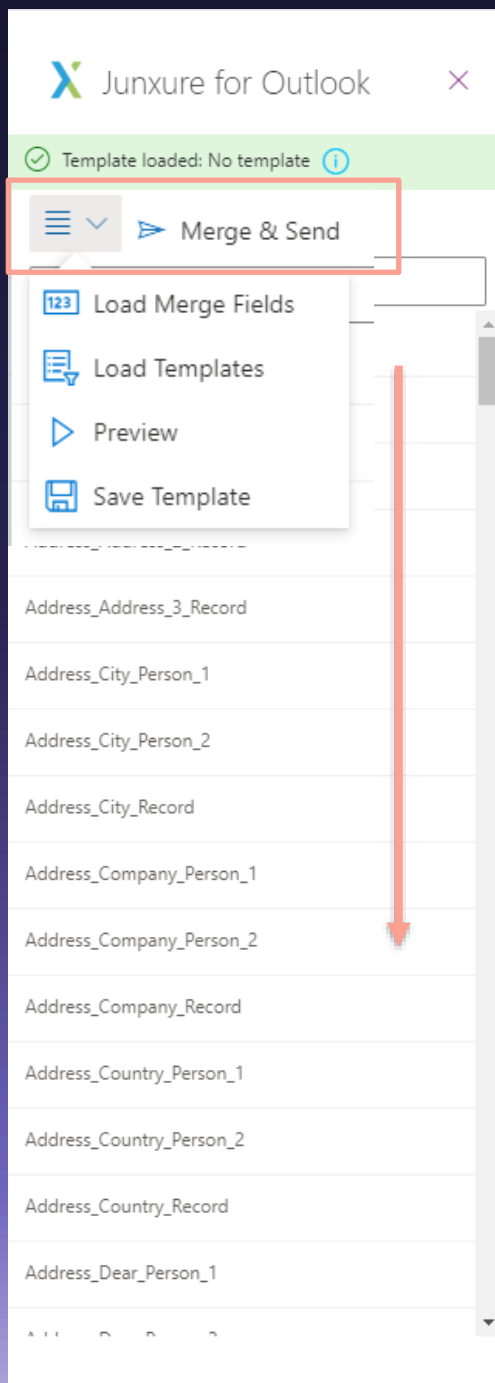
☐ Meeting | Due: 11/19/21

☐ Special Interest Article | Due: 06/29/21

(X) Cancel

Save

Using the CRM Add-in with 365



Using the CRM Add-in with 365

From the
Tool Bar



Merge & Send

From a Record or Action



Send

Discard

Sending Email from CRM

☒ Add Action to Records Using: Email

☒ Default

Edit Action

☐ Create Recipient List

Email - 9-14-2020

Recipient List/History Name

Folders

Add New Folder

All Record Documents

Account Forms

Asset Statements

Attachments

Compliance

Contracts

Correspondence

Documents

Email

Estate Documents

2020

Financial Planning

Inbox

Description

Correspondence Email

Created By

Cameron, Tricia

Type

Email

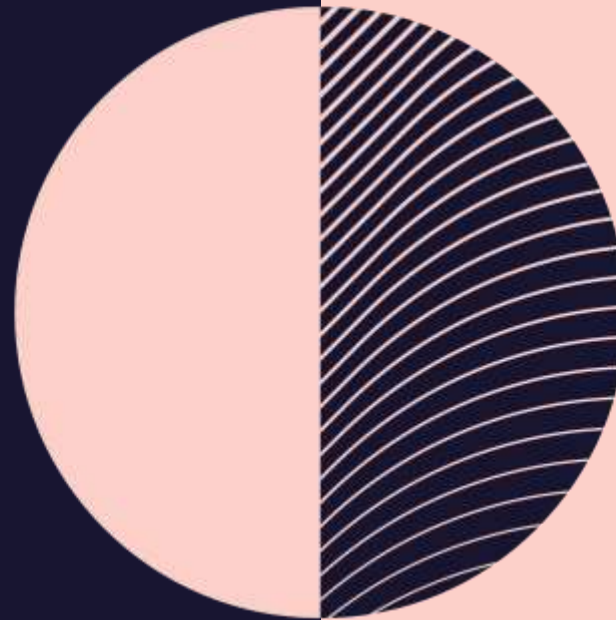
Tags

-Select Tags-

Cancel

Merge & Save

Thank You for
watching



Questions can be addressed to
crmtraining@advisorengine.com