Integrating Email and Business Applications

Modern workflows are often triggered by an email. Customers, suppliers and other stakeholders regularly generate requests for information, place orders for new products and services, or initiate new services cases. Connecting or integrating email systems with other business applications can dramatically improve productivity for users and responsiveness to customers.

The majority of businesses use Microsoft Outlook as their email platform, and of these, the majority use Outlook connected to Microsoft Exchange Online, part of the Office 365 suite of cloud products.

Outlook provides for 'add-ins' to be installed within the email user interface, to provide additional functionality or connections to other applications.

Some regularly-used email add-ins include:

- FindTime which assists in sending out multiple options for meeting times to invitees to allow individuals to vote on the best time that suits them for a particular meeting. It can save hours of time emailing back and forth to find a time that suits lots of people planning to have a meeting.

- Template Phrases provides for a list of commonly used phrases, sentences or paragraphs of text to be added easily to emails as they are being created. This can improve the consistency of messaging by multiple users within an organisation, as well as improving user productivity by not having to retype regular message content repeatedly.

- Action items creates suggestions for tasks by analysing the content of messages and identifying where actions such as 'organise a meeting' or 'call me back when you can' are contained within the text of a message.

Thousands of Add-ins are available to extend the functionality of Outlook which can be enabled by clicking on the "Get Add-ins" button in the ribbon.

The technology used to enable add-ins has evolved over time.

Early add-ins suffered from performance issues, complexities with installation and conflicts between multiple add-ins. Modern add-ins now extend Outlook features without these problems and limitations.

Large complex applications, such as Microsoft Dynamics 365, the cloud CRM solution that includes sales, marketing, service, project service automation, field service and other components includes a comprehensive add-in solution that allows users to add contacts to the CRM system from an email received in Outlook, without having to open Dynamics 365 and cut and paste information into that system.

A task-pane appears where new records can be created directly from within Outlook, making this process far easier, quicker and simpler than the traditional process of starting the Dynamics 365 application. While many organisations have sought to reduce their email traffic by utilising collaborative workspace and messaging tools such as Microsoft Teams, email remains a significant communications tool for virtually all people in every organisation.

By connecting email with other line of business applications, significant improvements in productivity may be available.

Business Central and Outlook

The cloud accounting and ERP system from Microsoft, Dynamics Business Central, includes an Outlook add-in app that brings some Business Central functionality directly to the email system.

After enabling the add-in, a contact insights feature can recognise the email address of a sender as a customer in Business Central, and display contact information about that organisation directly within Outlook. Users are also empowered to drill down into that customer record to see more detail on specific documents and transactions, as well as to review the sales history for that customer.

In the case of a new customer, details can be added directly from Outlook to create the customer record in Business Central.

Using the Business Central Outlook Add-in, sales quotes can be generated and emailed to a customer entirely from within Outlook. With so many people having Outlook permanently running on their computers, the ability to interact with the accounting system from within the email system can significantly improvement responsiveness to customers.

For organisations who record billable appointments within their Outlook calendar, invoices can be generated from the calendar item, rather than opening Business Central to process and send a sales invoice.

Emails that contain a document reference such as a quote number will be recognised by the add-in, with information about the document being accessible from the email.

A document links button above the body of the message allows for modification and actions to be taken on the document, similar to how they would otherwise be done in Business Central.

The Outlook Add-in for Business Central streamlines business processes to improve team productivity by empowering users to access information without having to change applications.

The ultimate result, is to strengthen engagement with customers to improve satisfaction and profitability.