



Note: You do not need to do this if you have an existing email server profile. However, we recommend creating a new server profile for testing before rolling out Prism Email Router to the live profile.

1. Create Email Server Profile

1. Navigate to **Settings\Email Configuration** and select **Email Server Profiles**

Dynamics 365 Settings Email Configuration

Email Configuration

What would you like to do?

Email Server Profiles
Set up the email channel by creating an email server profile and adding mailboxes to it.

2. Click **New** and select one of the server types. The type itself does not matter, but I'm going to use **Exchange (Hybrid)** to mimic an existing live deployment.

Dynamics 365 Settings E

+ NEW DELETE EMAIL A LINK

Exchange Server

Exchange Online (Hybrid)

POP3/SMTP Server

IMAP/SMTP Server

Act

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Set the profile **Name** and click Save.

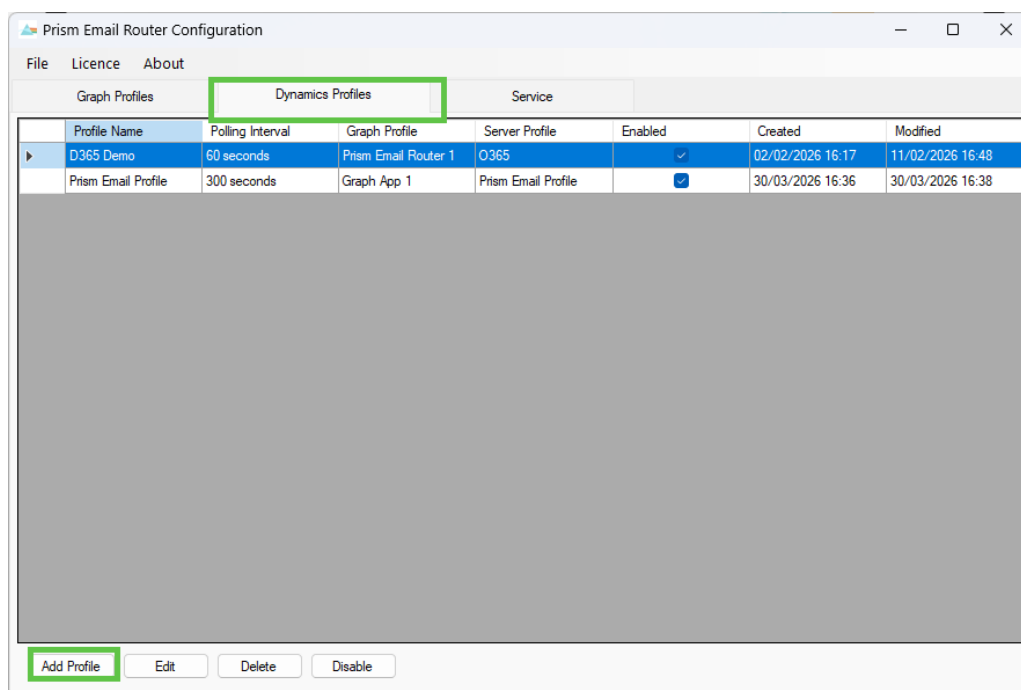
Name *	Prism Email Profile
Description	
Server Type	Exchange Online (Hybrid) Owner *
Use Default Tenant Id	<input checked="" type="radio"/> Yes <input type="radio"/> No
Exchange Online Tenant ID	1c 35c
Auto Discover Server Location	<input checked="" type="radio"/> Yes <input type="radio"/> No



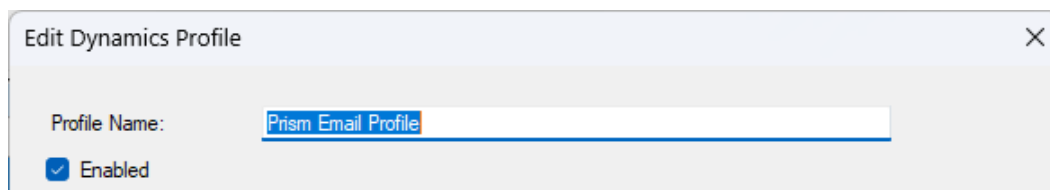
2. Prism Email Router Dynamics Profile

Now we can configure the Dynamics profile in Prism Email Router

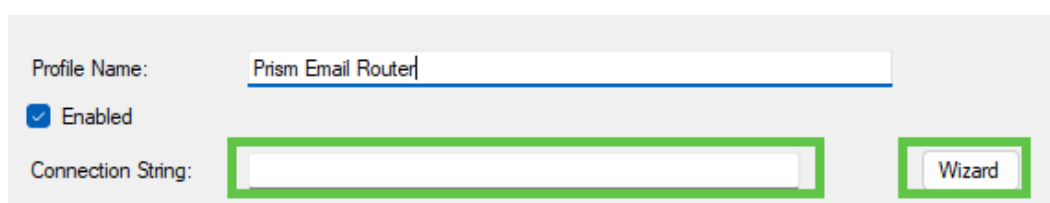
1. Open Prism Email Router Configuration, click on the **Dynamics Profiles** tab, then click the **Add Profile** button



2. Enter a name for this Profile. I will use the same name as the Dynamics profile in this case



3. Use the **Wizard** button to connect to Dynamics 365, or manually enter a Dynamics connection string.





4. If using the wizard, enter your server and user account details and then **Validate Connection** and **Save**

Connection Wizard

Environment URL:

IFD Deployment

Home Realm URL:

Domain:

Username:

Password:

Note: The Dynamics user account must have the permissions detailed in our **Security Role guide** as a minimum.

5. Click **Select** on **Server Profile** and choose the **Dynamics email profile** configured in stage 1.

Add Dynamics Profile

Select Email Server Profile

Select an email server profile (2 found):

Profile Name	Profile ID
O365	f9c5990f-ee35f011-b807-246e9671c7ff
Prism Email Profile	ab00fcb2-4d2c-f111-b807-246e9671c7ff

6. Select the **Graph Profile** to use, which was configured using the previous guide.



Profile Name: Prism Email Profile

Enabled

Connection String: AuthType=AD;Url=htt Edit Wizard

Interval (seconds): 300

Graph Profile: Graph App 1

7. Click **Test Dynamics** and **Test Graph** to confirm that the connections are configured correctly.

8. Some optional settings are also available:

Interval is set to 300 seconds by default. This is the time between checks for new incoming and outgoing email. You may want to lower this while testing so that emails are picked up faster, but to avoid Graph API rate limiting, we recommend leaving it at 300 for live deployments.

We exclude some Outlook folders from the sync by default. Add or remove these **Excluded Folders** as needed.

If you want to apply an **Outlook category** to messages tracked or sent by Prism Email Router, you can also set this here.

Profile Name: Prism Email Profile

Enabled

Connection String: AuthType=AD;Url=htt Edit Wizard

Interval (seconds): 300

Graph Profile: Graph App 1

Server Profile: Prism Email Profile Select... Clear

Server Profile ID: ab00fcb2-4d2c-f111-b807-246e9671c7ff

Excluded Folders: Deleted Items, Junk Email, Outbox Remove

Use Tracking Category

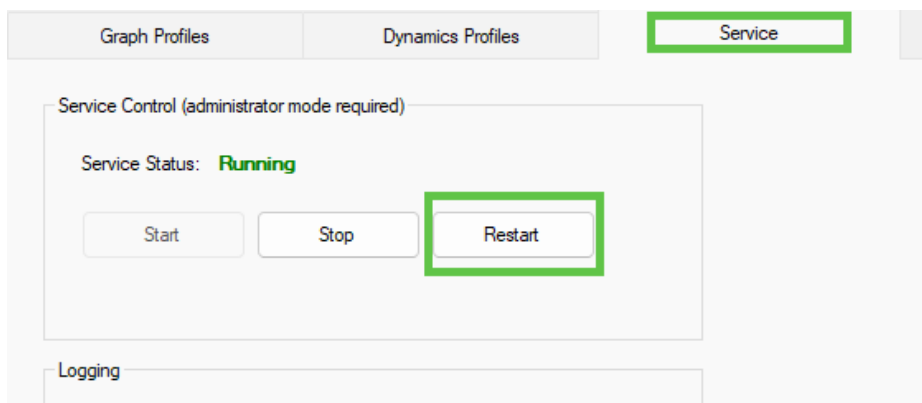
Category Name: Tracked To Dynamics 365

Test Dynamics Test Graph Save Cancel

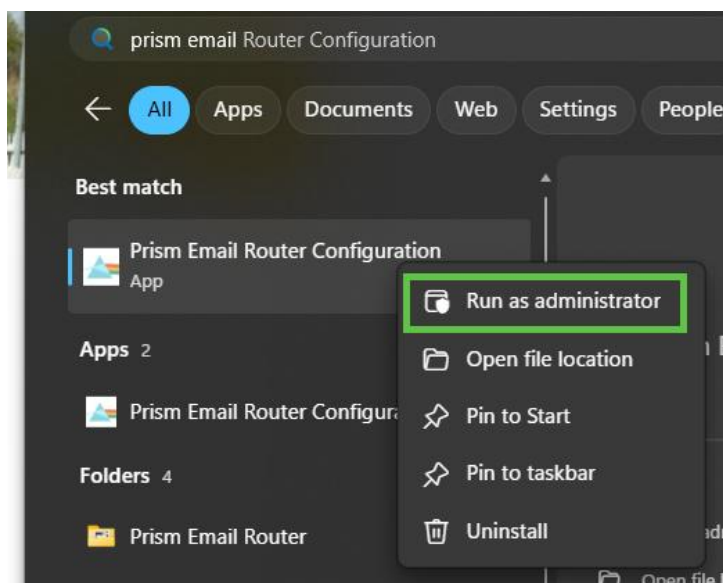


9. Click **Save** once all settings have been configured and tested

10. On the **Service** tab, click **Restart** to restart the Prism Email Router Windows service to pick up the new profile (you can also do this from services.msc if preferred).



Note: If you get a warning when restarting the service, you may need to close and run the application as administrator to use this function:



You can now test sending and receiving emails from any mailbox assigned to the configured Dynamics Email Server Profile.