

Tracking Emails using Outlook

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Email Tracking in Outlook

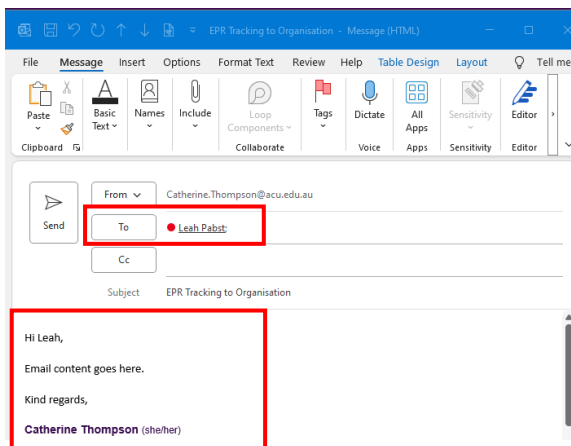
To track emails from Outlook to the Educational Partnerships Register (EPR), you will need to utilise Microsoft Dynamics 365 (D365) (access will be required before use). This functionality enables you to track email exchanges and link them directly to an Organisation, Agreement, Activity, or Contact within the EPR. Email tracking is advised exclusively from a **Primary** email address and **not** a Shared email address. Additionally, it's important to initiate email tracking **only** when the contact is already listed in the EPR to prevent duplicate entries.

Note: Before initiating email tracking to the EPR, Business Units **must** establish their own business processes. This involves specifying the location for email tracking, whether this will be at an Organisation, Agreement or contact level. As well as determining which emails are appropriate for tracking and which are not.

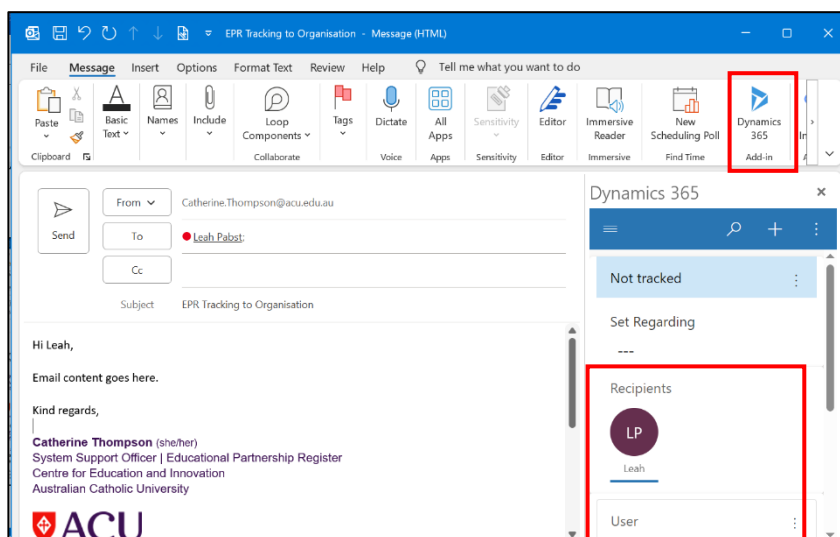
The examples used in this manual, will be tracking to an **External Organisation**.

Composing and Tracking a sent email

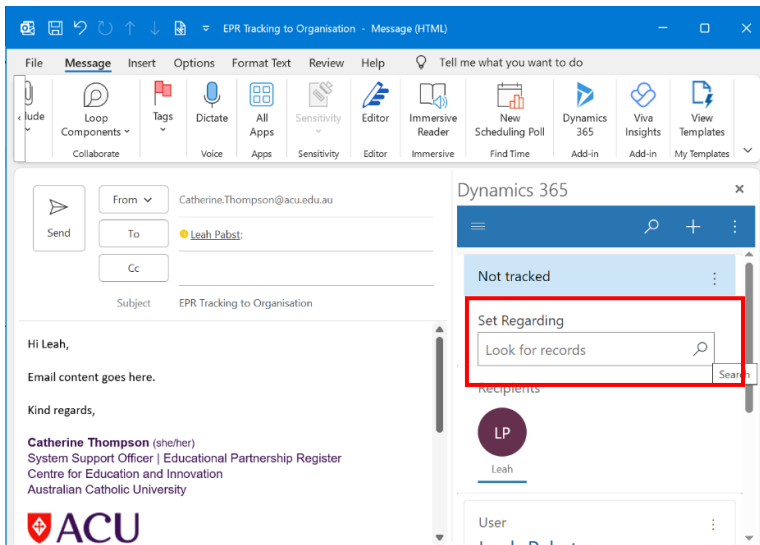
1. Open a new email in **Outlook**. Address your email to the existing contact within the EPR and create your email content.



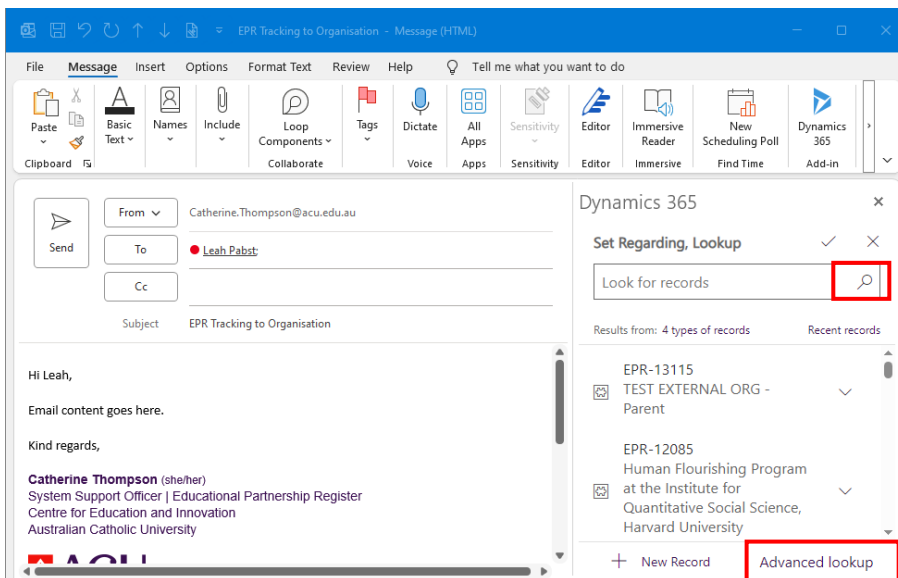
2. Click on **Dynamics 365** button. The recipient will appear as a contact in the Dynamics 365 tracking pane.



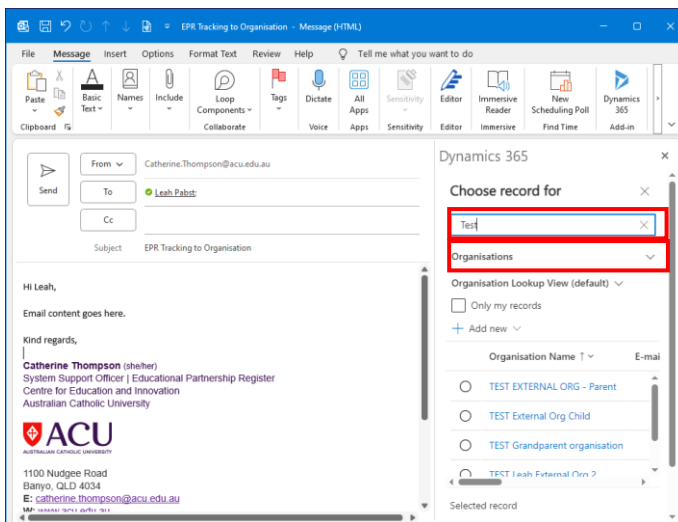
3. Click in the look up field under **Set Regarding** to search for the **External Organisation**.



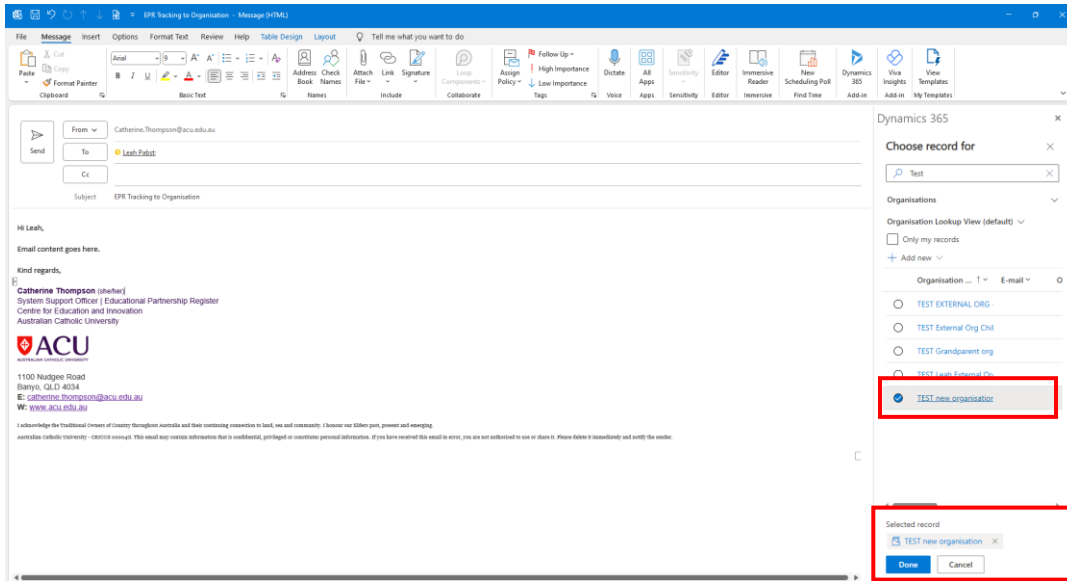
To perform an advanced search, click on the search icon  or click **Advanced Lookup**.



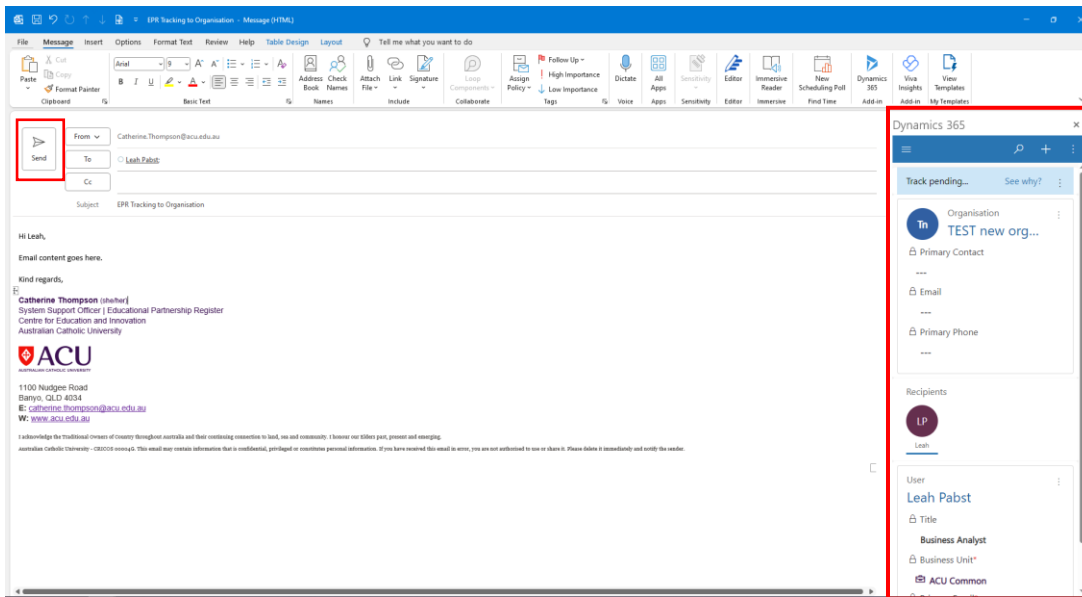
In Advanced Lookup, search by Organisations.



4. Select the correct **Organisation** from the search results. Ensure the record appears in **Selected record**, click **Done**.



5. You are now able to see in the Dynamics 365 window, the Organisation and Contact person. Once you have checked this information is correct. Click Send.

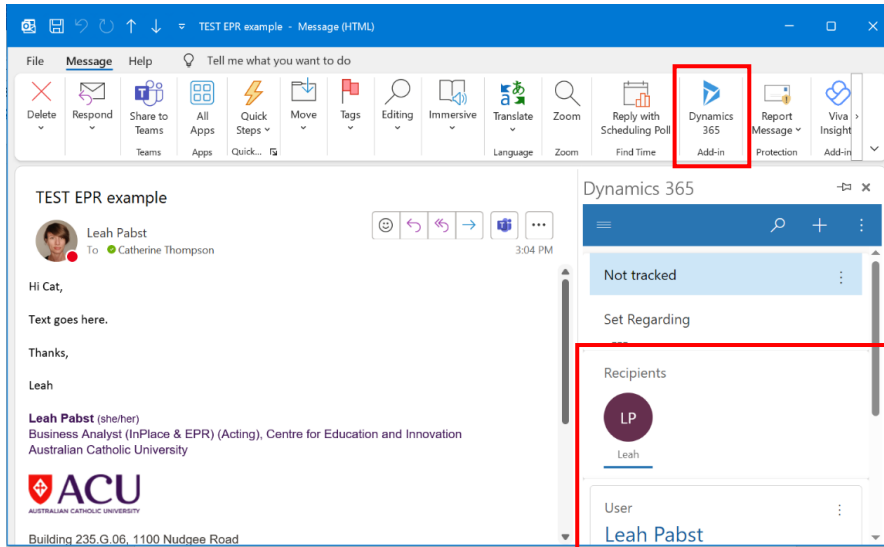


The email as well as any replies will be tracked in the EPR. Instructions on how to view the email in the EPR are detailed on page 9 of this manual.

Tracking a received email to an External Organisation.

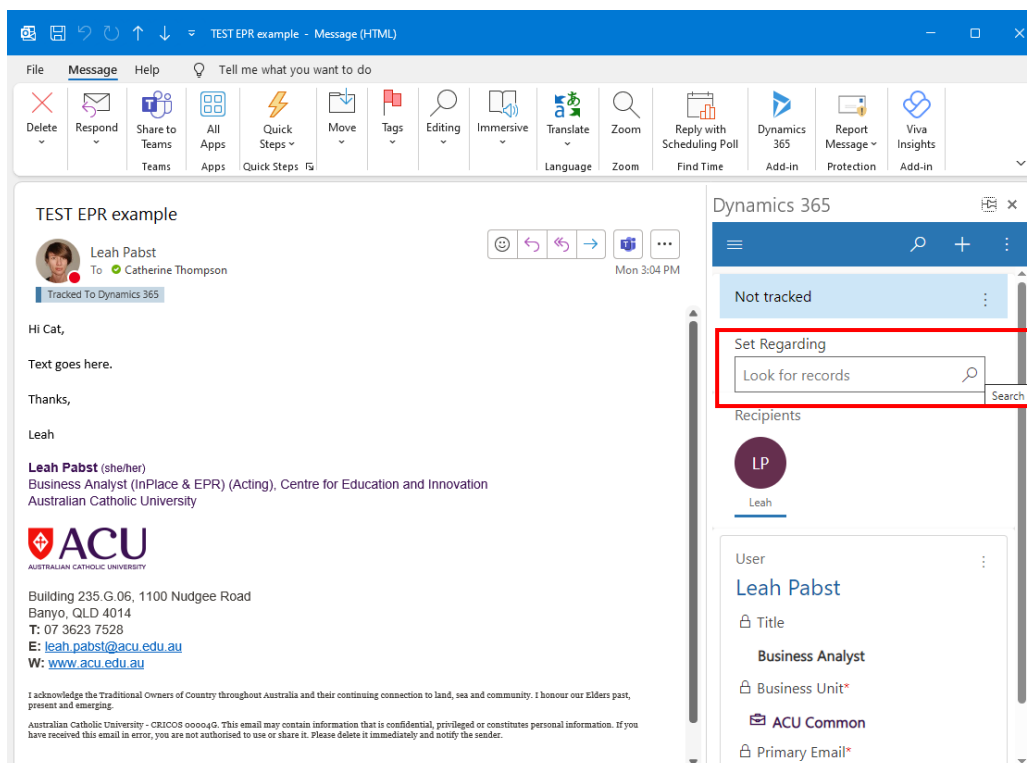
You receive an email from a contact person existing in the EPR, which is currently not tracked, and you want to track it to the **External Organisation** within the EPR.

1. Open the email in **Outlook**, click on the **Dynamics 365** button. The recipient will show up as a contact:

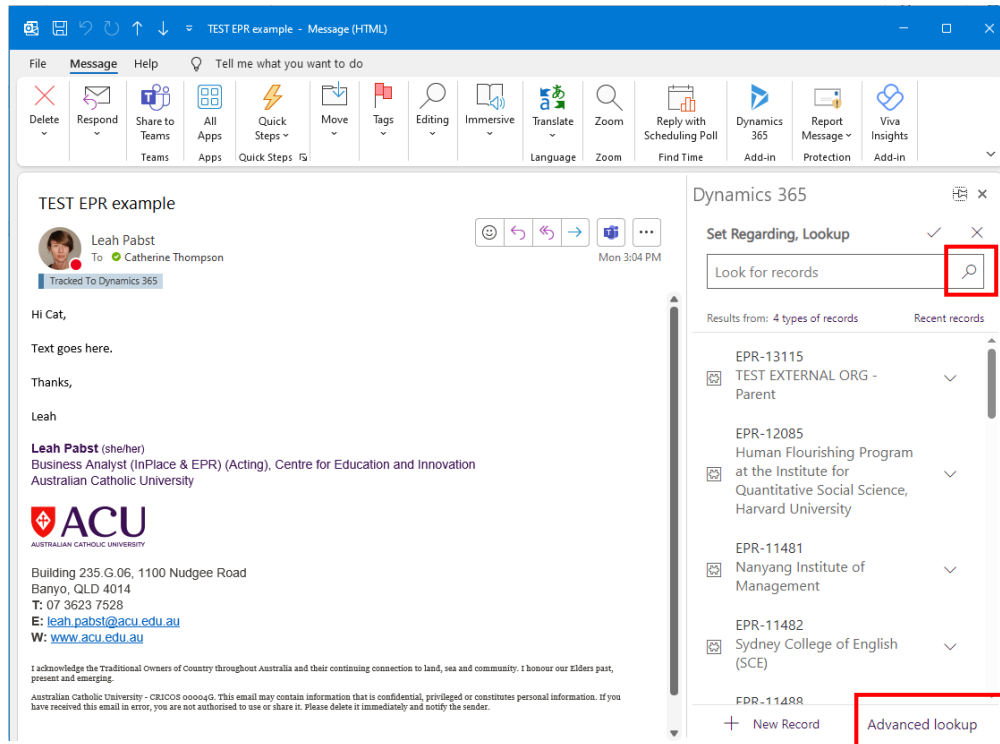


Note: If the recipient does not show as a contact, you will first need to create the contact in the EPR prior to tracking the email.

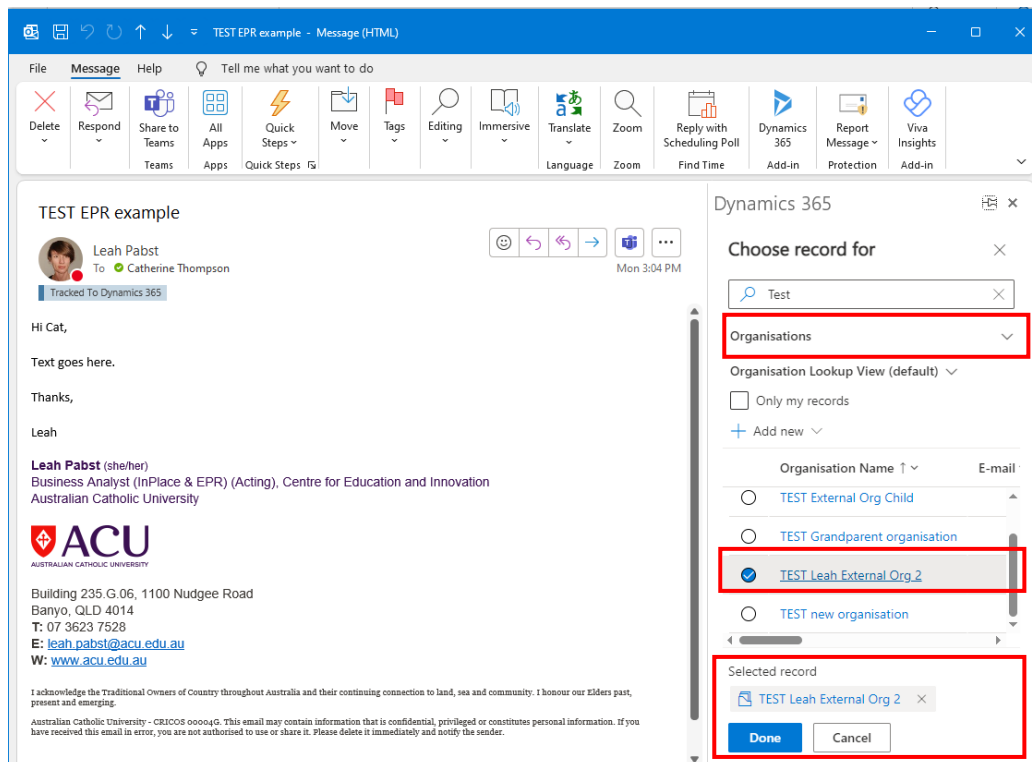
2. Click in the look up field under **Set Regarding** to search for the **External Organisation**.



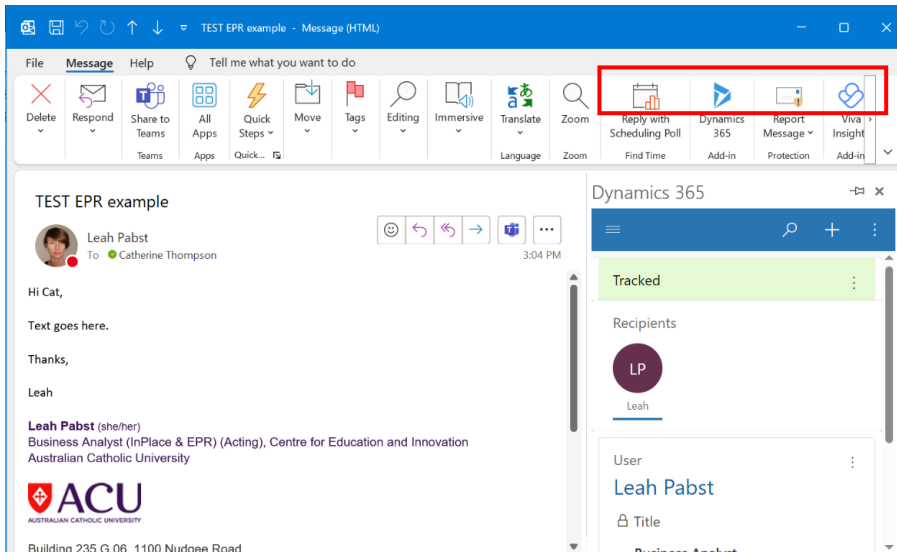
3. To perform an advanced search, click on the search icon . Click **Advanced Lookup**.



6. In **Advanced Lookup**, ensure you search by **Organisations**. Select the correct **Organisation** from the search results. Ensure the record appears in **Selected record**, click **Done**.



4. The email will now show as **Tracked** and can be viewed in the EPR.

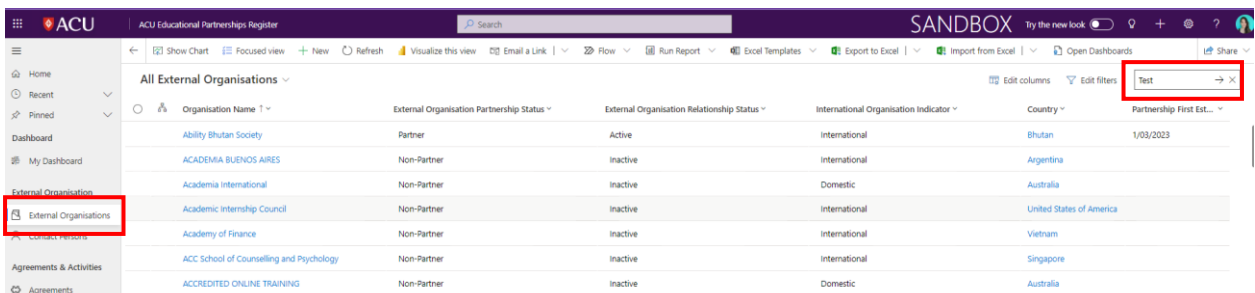


Note: The same process can be followed to track emails to **Agreements** and **Activities**. In the look up field under **Set Regarding**, select the appropriate Agreement or Activity.

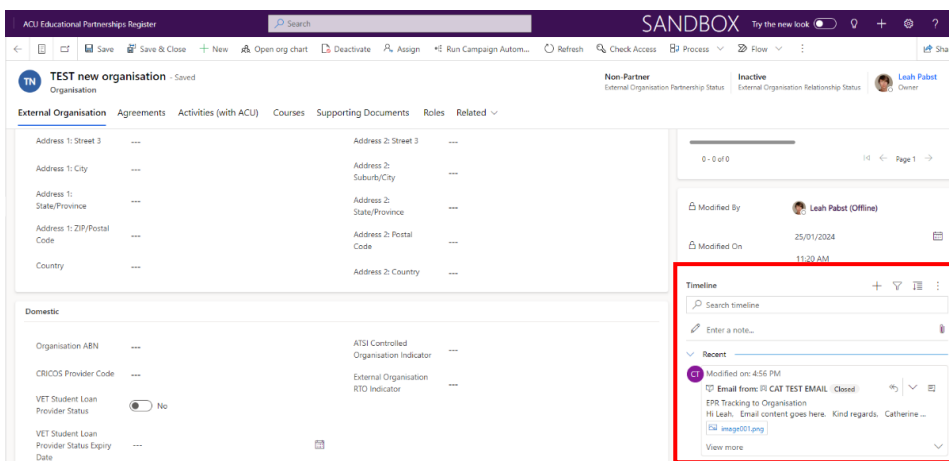
Viewing the email in the EPR

You have tracked an email to the EPR and want to view this in the System.

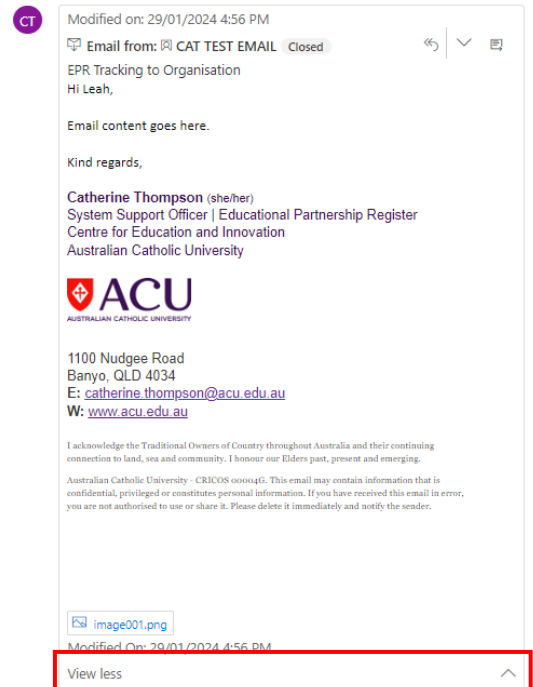
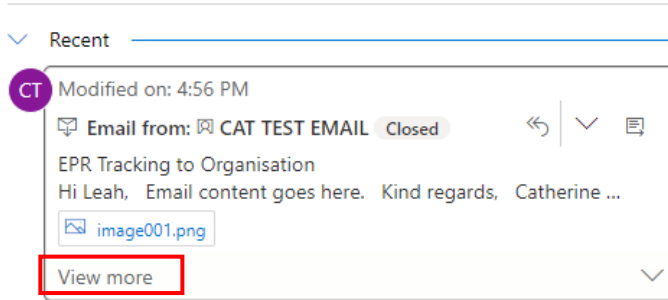
1. To view the sent email, navigate to **External Organisations**, search for the organisation:



2. Click on the External Organisation to open the record. You can view the email activity on the **timeline**:

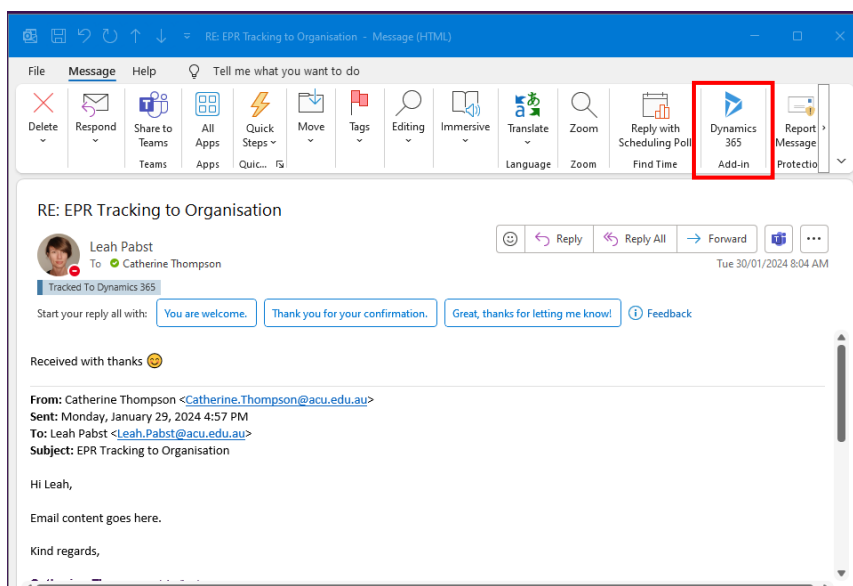


Click on **View more** to see the email in full or click **View less** to condense the email

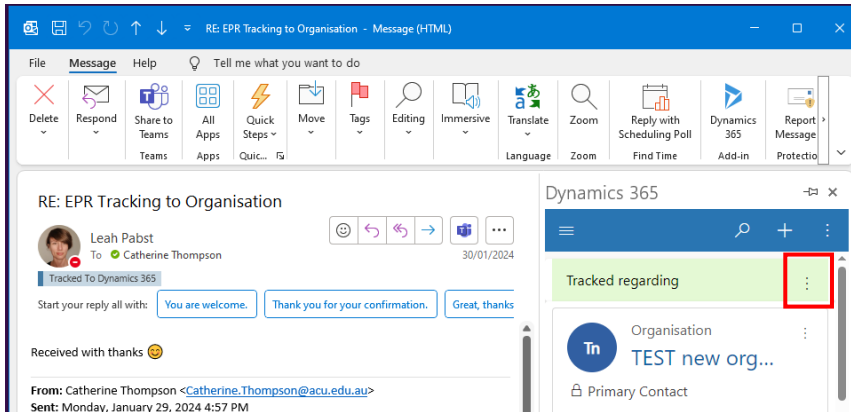


Stop Tracking Emails to the EPR

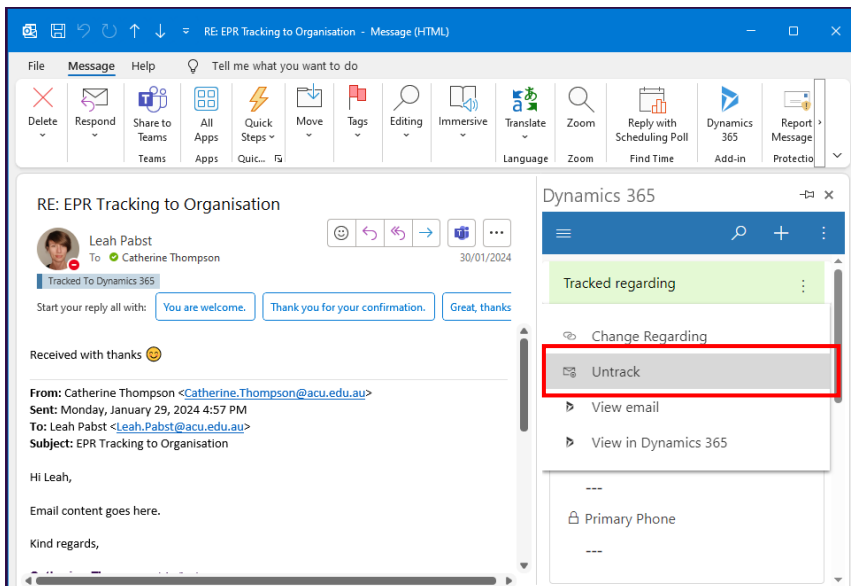
1. Navigate to the email you wish to stop tracking. Click on **Dynamics 365** button.



- In Dynamics 365 tracking pane, click the 3 dots in the green bar, next to **Tracked Regarding**.



- Select **Untrack**.



- The green bar will turn blue and show **Not Tracked**. The email will no longer be tracked.

