Smart Email Monitoring

A feature that provides the ability to check queue mails and send alerts if any mails are in pending state and not received to respective configured users.

1 Overview:

The Smart Email Monitoring solution helps in tracking emails in configured queue send alerts accordingly. The solution built in Dynamics 365, works in 2015 above online and on premise versions of CRM

2   How does Smart Email Monitoring Solution work?

The Smart Email Monitoring solution uses one plugin and two workflows.

Prerequisites for queues:

- Queue should exists valid incoming email id.
- Queue is enabled for Server-Side Synchronization or Email Router for both incoming and outgoing mails to monitor the mails both incoming and outgoing mails.
- Queue is enabled for Server-Side Synchronization or Email Router for incoming mails to monitor the incoming mails.
- Queue is enabled for Server-Side Synchronization or Email Router for outgoing mails to monitor the outgoing mails.

Plugin will trigger on creating record and updating the queue in existing record in Email Monitor Config entity. While creating the record it will create a record in Schedule Process entity which will trigger the workflow and this job will run for every one hour.

Workflows uses assemblies which check the mails configured queues and send the alerts as mentioned below.

- If any pending status emails exists in queue, then email alert will be sent from configured user to configured emails in Email monitor Config entity, else won't send any alert.
- If email not received in queue from last one hour, then it will send test mail to queue incoming mail id, after for 10mins checks for the mail received or not, if not send alert to the configured emails.

Note: Solution does not handle if any action performs on queue mails.

Once downloaded from AppSource to your Dynamics 365 application, there are one steps to make the solution work, administrator would need to configure existing queues which are having valid incoming email address in Email Monitor Config entity.

Enlisted below are the different roles in Dynamics 365 who are involved in this process.

- ➢ 1) Display "Email Monitor Config" entity under Settings Tile: Go to: Setting Tile à Customization à Customize the System à Select Entities under Components à Click on Email Monitor Config à Check Settings under Areas that display this entity then proceed with save and publish the entity.

➢ System Administrator –Configure queues in Email Monitor Config entity.
   Settings->Extensions->Email monitor Configs

For Incoming and Outgoing Mail Monitor

EMAIL MONITOR CONFIG : INFORMATION

Live User ⩧

⚠ Solution does not handle if any action performs on queue mails, Please configure or do the changes accordingly
ⓘ Please provide ';' separated mail list to send alert mails

◢ General

Monitor Type *	**Incoming & Outgoing Monitor**
Queue *	**Live User** ⇐ Queue
Queue Mail Id *	🔒 **liveuser_dec2017@outlook.com**
Mail List *	**emailmonitor@microsoft.com;smartemailmonitor@microsoft.com;**
Owner *	

Provide ";"
seperated mail ids
to send alerts

For Incoming Mail Monitor

EMAIL MONITOR CONFIG : INFORMATION

Live User ⋮≡

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> ℹ Please provide ';' separated mail list to send alert mails

▲ General

Monitor Type *	**Incoming Mail Monitor**
Queue *	**Live User**
Queue Mail Id *	🔒 **liveuser_dec2017@outlook.com**
Mail List *	**emailmonitor@microsoft.com;smartemailmonitor@microsoft.com;**
Owner *	👤 ~~Amil Parkinghona~~

For Outgoing Mail Monitor

EMAIL MONITOR CONFIG : INFORMATION

Live User ⋮≡

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> ℹ Please provide ';' separated mail list to send alert mails

▲ General

Monitor Type *	**Outgoing Mail Monitor**
Queue *	**Live User**
Queue Mail Id *	🔒 **liveuser_dec2017@outlook.com**
Mail List *	**emailmonitor@microsoft.com;smartemailmonitor@microsoft.com;**

Prerequisites/ Configuration steps for sending alert form queues:

Solution also provided to send alerts from different servers

Configurations Steps:

Step 1. Configure Email Server Profile (Settings->Email Configuration->Email Server Profiles -> Create New profile for POP3/SMTP server profile) as mentioned below

   If it is Gmail server profile

Name *	Gmail Server Profile			
Description				
Server Type	POP3/SMTP Profile		Owner *	
Incoming Server Location	pop.gmail.com			
Outgoing Server Location	smtp.gmail.com			

◢ Credentials

Incoming Connection

Authenticate Using	Credentials Specified by a User or Queue
Use same settings for Outgoing	● Yes ○ No

◢ Advanced

Incoming and Outgoing Connection

Incoming Port	995	Outgoing Port	995
Incoming Authentication Protocol	Basic	Outgoing Authentication Protocol	Basic

Additional Settings

2. Create Queue with valid mail (Gmail Address) address

QUEUE

Gmail user ▾≡

SUMMARY

Name *	**Gmail user**
Type *	**Public**
Incoming Email	liveuser.dec2017@gmail.com
Owner *	👤 ▬▬▬▬▬▬
Description	--

EMAIL SETTINGS

Convert Incoming Email To Activitie! *	**All email messages**
Mailbox	🔒 **Gmail user**

3. Open Mailbox respective to the configured queue as highlighted in above screenshot.

And provide the username and password for the email id and select synchronization as mentioned in below screenshot.

◢ General

Mailbox Information

Name *	Gmail user	Owner *	👤 ▬▬▬▬▬ 🔍
Email Address	liveuser.dec2017@gmail.com	Is Forward Mailbox *	◯ Yes ◉ No
Regarding	📄 Gmail user 🔍	Delete Emails after Processing	◯ Yes ◉ No

Credentials

Allow to Use Credentials for Email Processing	◉ Yes ◯ No		
User Name	liveuser.dec2017@gmail.com	Password	••••••••••••••••••••••

Synchronization Method

Server Profile	📧 Gmail Server Profile	🔍
Incoming Email	Server-Side Synchronization or Email Router	▼
Outgoing Email	Server-Side Synchronization or Email Router	▼
Appointments, Contacts, and Tasks	Microsoft Dynamics 365 for Outlook	▼

4. System administrator need to approve the mailbox then all set for the sending alert mails.

Now we are able to send alert mails from the configured queue

  ➢ Plugin will create record in schedule process record, Please check

Check the record (Advance Find->Schedule Process)

SCHEDULE PROCESS : INFORMATION

SMART eMail Monitoring ≡

Process*
Smart Email

▴General

Name*	SMART eMail Monitoring	Activation Counter	1
Process*	Smart Email Monitor	Hours Interval	1
Activation Frequency 🔒	Hourly	Last Activation Compl	Success
Last Activation	11/22/2017 4:29 PM	Next Activation	11/22/2017 5:28 PM
Status Reason	Scheduled	Last Activation Error	--
Target Records	<fetch mapping='logical' count='1'> <entity name='msdyn_emailmonitorconfig'> <attribute name='msdyn_name' alias='msdyn_name'/> </entity> </fetch>		

Schedule Process Works in this way:

When the admin created record in Email Monitor Config entity the schedule process record created by plugin (if exists won't create) and it will trigger the scheduled job.

If you deleted unfortunately and you want to configure manually procedure is

Process: Lookup for the process, Select the process "Smart Email Monitor"

Activation Frequency: 1 hour, to trigger job for an hour interval

Next Activation: Greater than the present time

Hour's interval: should be 1

Status Reason: Scheduled, if you select suspend job will not run

Last Activation error: if any error occurs in job workflow will update the error message for the same

Target Records: Please copy and paste below xml, below xml returns at least one record from Email Monitor Config entity.

```
<fetch mapping='logical' count='1'>
 <entity name='msdyn_emailmonitorconfig'>
   <attribute name='msdyn_name' alias='msdyn_name'/>
 </entity></fetch>
```

Note: If you want to manually update the next activation date of existing process, before updating the value make sure that cancel the existing job to avoid multiple job occurrences.

3. Troubleshooting Steps

System Administrators can use the quick tips below for troubleshooting any reported issues:
1. Ensure workflows are in activated state
2. Ensure SDK Message processing steps are enabled.
3. Check the status reason, next activation date and last activation error attributes in schedule process entity. If status reason is suspended select as scheduled and next activation date & time should be greater than current date and time.