Outlook Integration

Email Integrations · https://mriacrm.com/docs/outlook-integration/

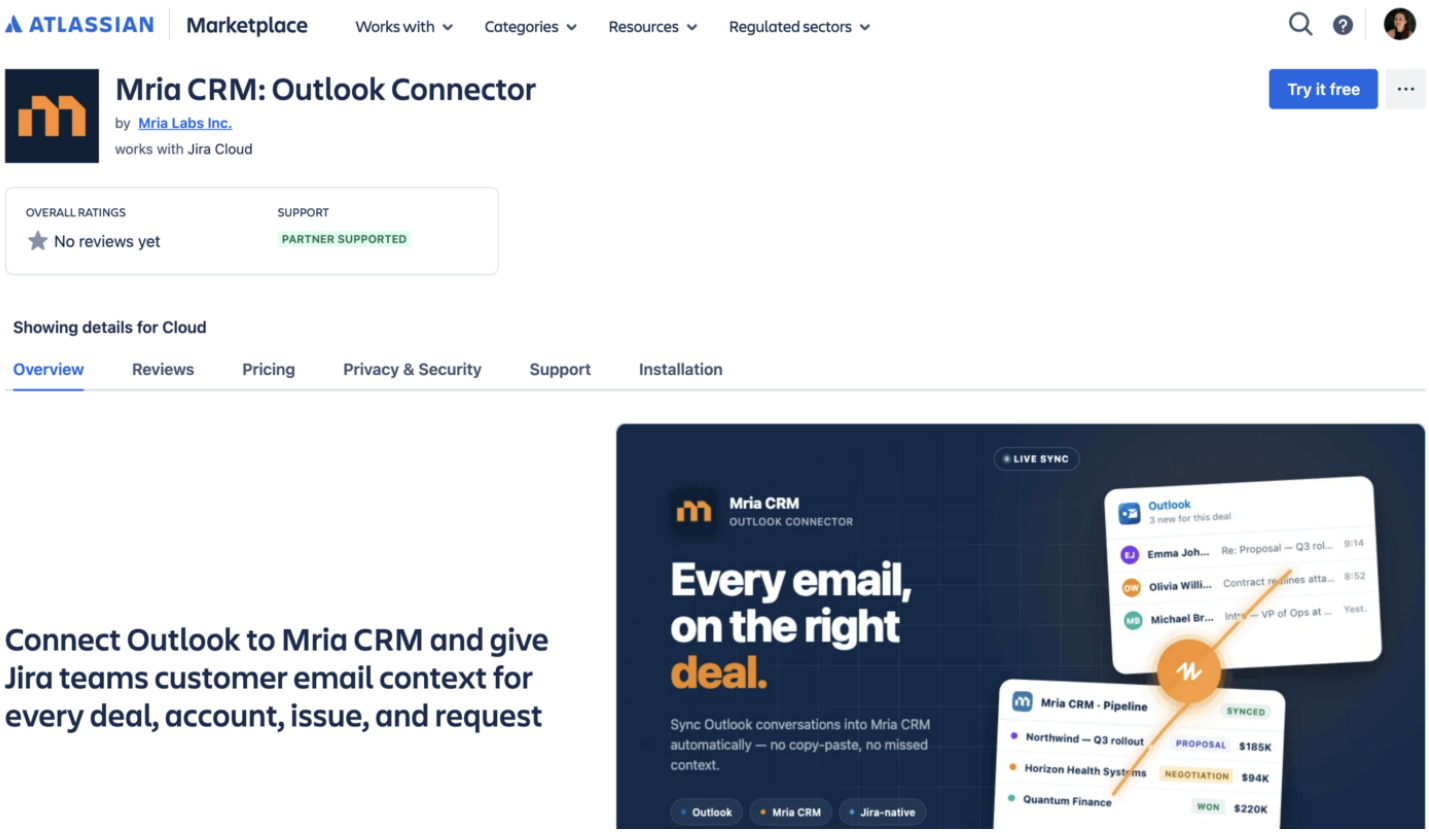
Mria CRM: Outlook Connector is a separate Atlassian Forge app that works exclusively as a satellite of **Mria CRM**. It has its own billing on the Atlassian Marketplace, but its only purpose is to bring Outlook email sync into Mria CRM — every sent and received email is automatically linked to matching Contacts, Leads and Deals.

The connector uses Microsoft OAuth to access Outlook data on your behalf. Sync runs **every 5 minutes** in both directions — incoming and outgoing emails are pulled into Mria CRM, and emails sent from Mria CRM are delivered through Outlook.

This page covers two parts:

Part 1. Setting up Mria Outlook Connector

Mria Outlook Connector is installed and managed separately from Mria CRM, but it must be linked to a Mria CRM site to work. Once linked, any user can connect their personal Outlook account and choose how their emails are shared.

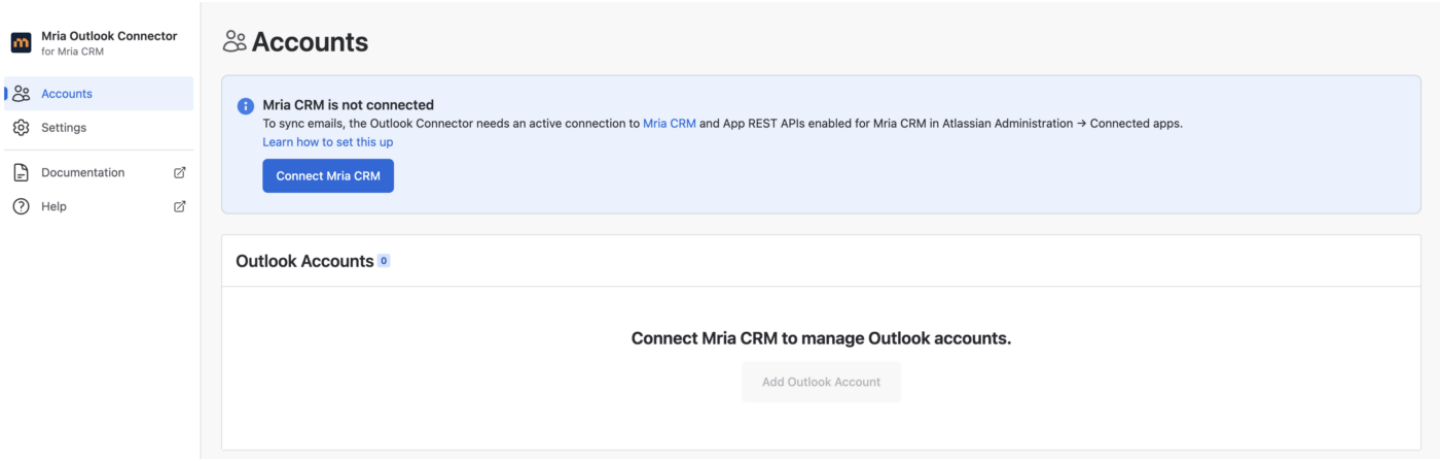


1.1 Opening the App

After installation, open **Mria Outlook Connector** from the Atlassian app switcher. The app has its own navigation:

- **Accounts** — connect Mria CRM and manage Outlook accounts.
- **Settings** — global settings (admin only).
- **Documentation** and **Help** — external links.

When you open the app for the first time, the **Accounts** page shows an empty state with the message "*Mria CRM is not connected*". The **Add Outlook Account** button is disabled until Mria CRM is connected.



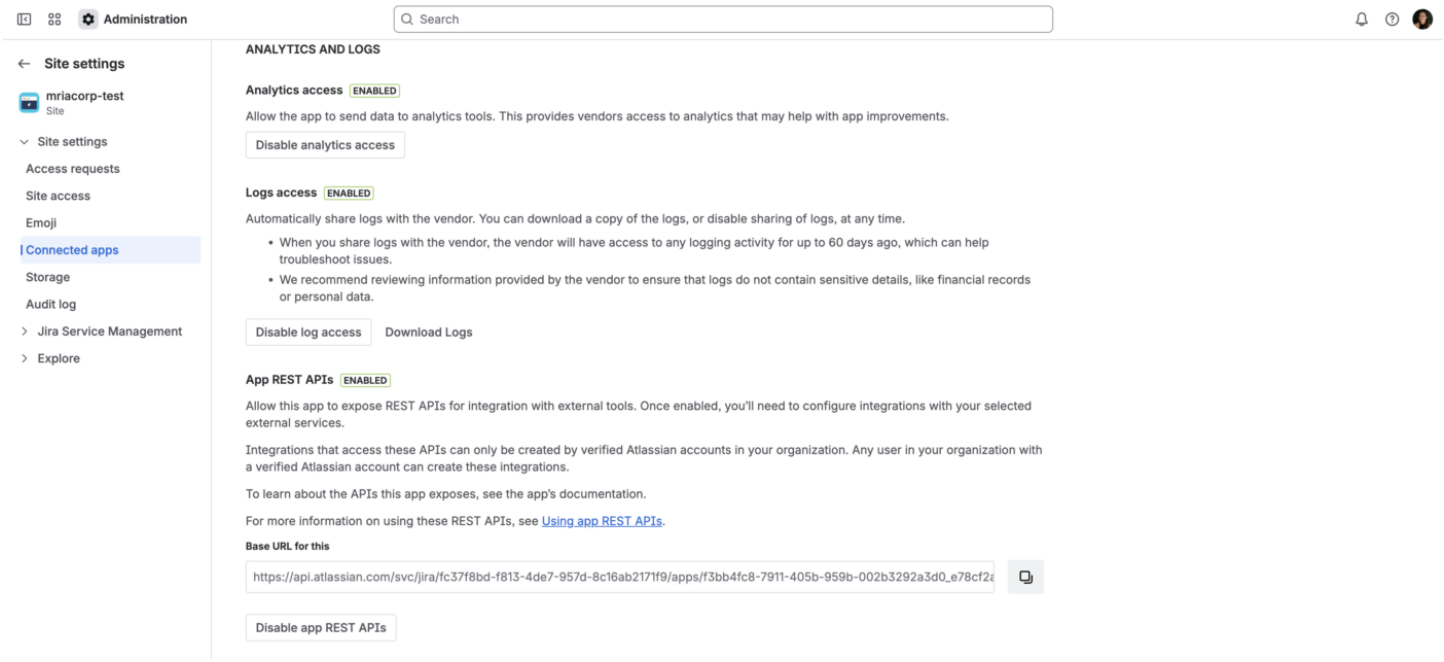
1.2 Enabling App REST APIs (Admin Only)

Before any user can connect Mria CRM to the Mria Outlook Connector, an Atlassian site admin must enable REST API access for the Mria CRM app. The connector uses these APIs to read and write CRM records during sync — without them, the OAuth consent in 1.3 succeeds but no emails will sync.

To enable:

1. Go to **Atlassian Administration** → select your site.
2. Open **Site settings** → **Connected apps**.
3. Select **Mria CRM** from the list.
4. Scroll to the **App REST APIs** section and click **Enable app REST APIs**.

Once enabled, the section shows an **ENABLED** badge and displays the **Base URL** for the app. You (or any user) can now proceed to 1.3 *Connecting to Mria CRM*.



Only verified Atlassian accounts in your organization can create integrations against these APIs. If the **Enable app REST APIs** button isn't visible, confirm you have site admin permissions for the Atlassian organization.

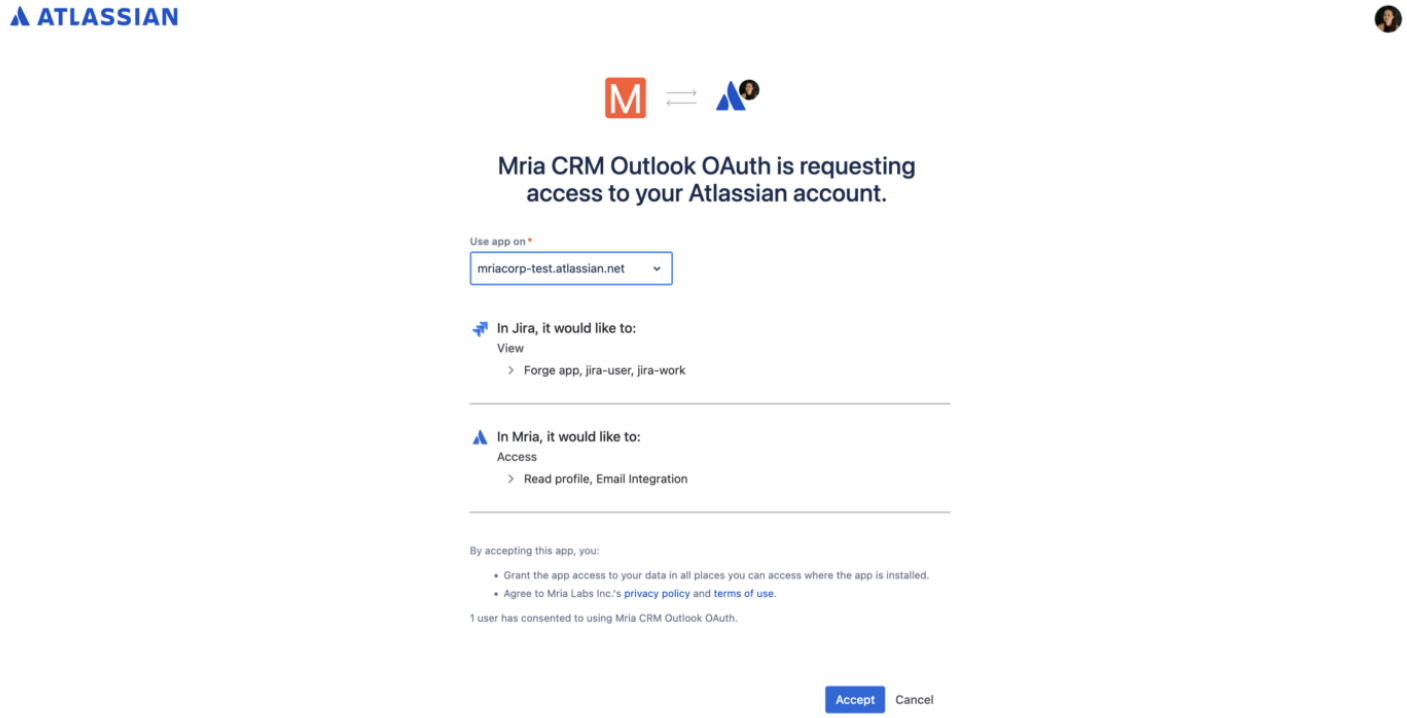
1.3 Connecting to Mria CRM

Once App REST APIs are enabled (see 1.2), link Mria Outlook Connector to your Mria CRM site:

1. On the **Accounts** page, click **Connect Mria CRM**.
2. You will be redirected to the Atlassian OAuth consent screen for **Mria CRM OAuth**.
3. In the **Use app on** dropdown, choose the Atlassian site where Mria CRM is installed (e.g. `mriacorp-test.atlassian.net`).
4. Review the requested permissions:
   - **In Jira** — *View*: Forge app, jira-user, jira-work
   - **In Mria** — *Access*: Read profile, Email Integration
5. Click **Accept**.

Once consent is granted, you are returned to the Accounts page and the banner switches to "*Connected to Mria CRM*". The **Add Outlook Account** button is now active.

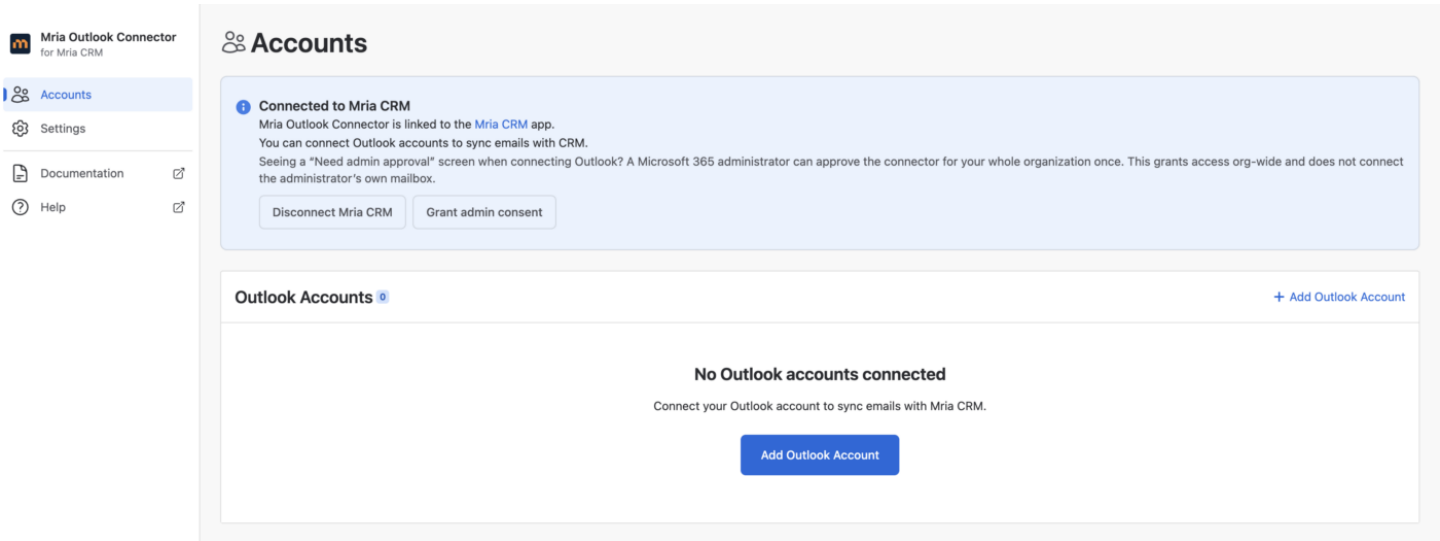
You can later click **Disconnect Mria CRM** to break the link. Disconnecting stops all email sync until Mria CRM is reconnected.



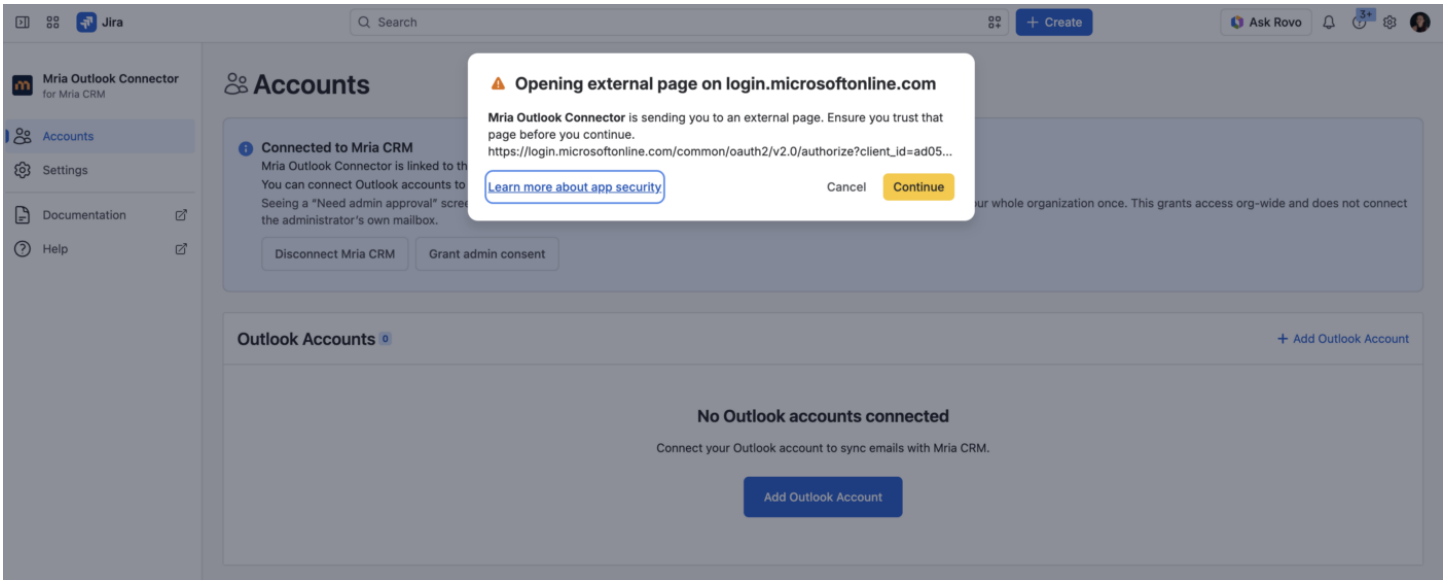
1.4 Adding an Outlook Account

Once Mria CRM is connected, each user can add their own Outlook account:

1. On the **Accounts** page, click **+ Add Outlook Account** in the top-right corner of the **Outlook Accounts** section.



2. A confirmation dialog appears: "*Opening external page on login.microsoftonline.com*". Click **Continue**.



Microsoft publisher verification was still in progress as of 24 September 2026. Until it completes, the Microsoft sign-in screen shows an *unverified app* notice for Mria CRM: Outlook Connector.

Whether you can accept that notice yourself is a tenant setting, not ours. Many Microsoft 365 tenants block user consent to unverified multi-tenant apps, and some block those apps outright. If yours does, sign-in stops here with a consent or policy error rather than letting you continue — this is working as configured, not a fault in the connector.

If you are blocked, ask a Microsoft 365 administrator to grant admin consent for the connector, as described under **Grant admin consent** below. Your organization's policy on unverified publishers is a decision for that administrator to make.

3. On the Microsoft **Sign in with Microsoft** screen, choose the Outlook account you want to connect, or click **Use another account**.
4. If you have signed in before, Microsoft shows a "*You're signing in*" screen — click **Continue**.
5. Approve the requested Outlook scopes.

Microsoft

n.timoshyna2026@outlook.com

MC

Let this app access your info? (1 of 1 apps)

unverified

Mria CRM: Outlook Connector needs your permission to:

Maintain access to data you have given Mria CRM: Outlook Connector access to
Allows Mria CRM: Outlook Connector to see and update the data you gave it access to, even when you are not currently using the app. This does not give Mria CRM: Outlook Connector any additional permissions.

Read your profile
Mria CRM: Outlook Connector will be able to read your profile.

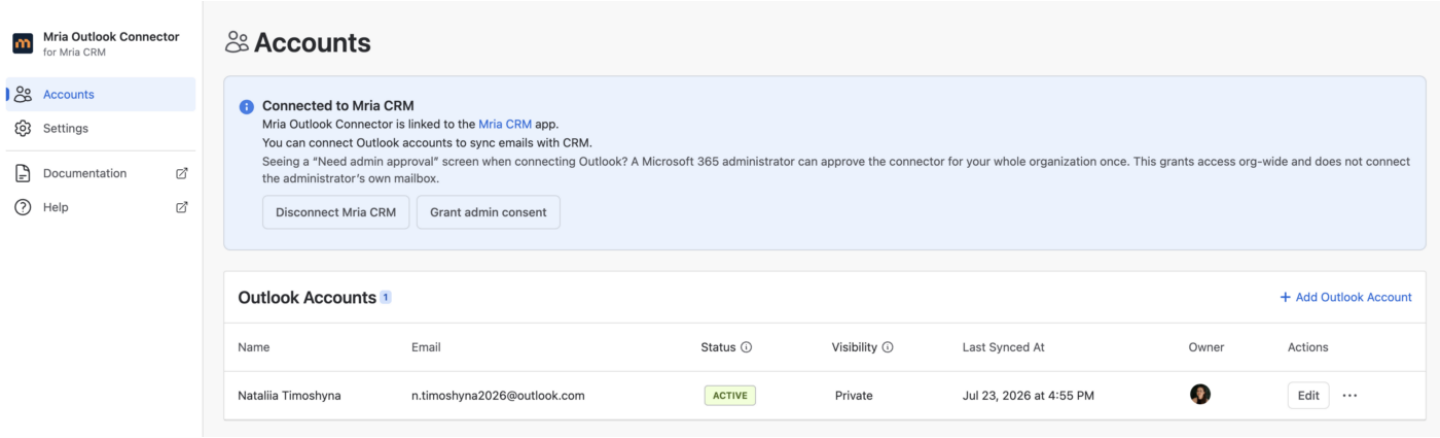
Read your mail
Mria CRM: Outlook Connector will be able to read email in your mailbox.

Send mail as you
Mria CRM: Outlook Connector will be able to send mail as you.

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy

Grant admin consent. Depending on your organization's Microsoft 365 settings, the permissions screen may include a **Grant admin consent** option (see the banner in the screenshot above). If your Microsoft tenant does not allow regular users to consent to apps on their own, a Microsoft 365 administrator must sign in and grant consent once on behalf of the whole organization. After that, the requested Outlook permissions are approved tenant-wide, and other users can connect their accounts without an approval prompt. If you are not an admin and Microsoft blocks the sign-in with a "*Need admin approval*" message, ask your Microsoft 365 administrator to complete this step first.

After authorization, you are redirected back to Mria Outlook Connector and the new Outlook account appears in the **Outlook Accounts** table.



Each user can connect more than one Outlook account (for example, a corporate and a personal mailbox). All emails from connected accounts are then routed into Mria CRM.

> The connector is built on Microsoft Graph, which only has access to mailboxes hosted in **Exchange Online**. Mailboxes hosted on an on-premises Exchange server (including hybrid deployments) cannot be synced — this is a limitation of the Microsoft platform, not of the connector.

1.5 Managing Connected Accounts

The **Outlook Accounts** table shows every Outlook account connected to this Mria CRM site. For each account you can see:

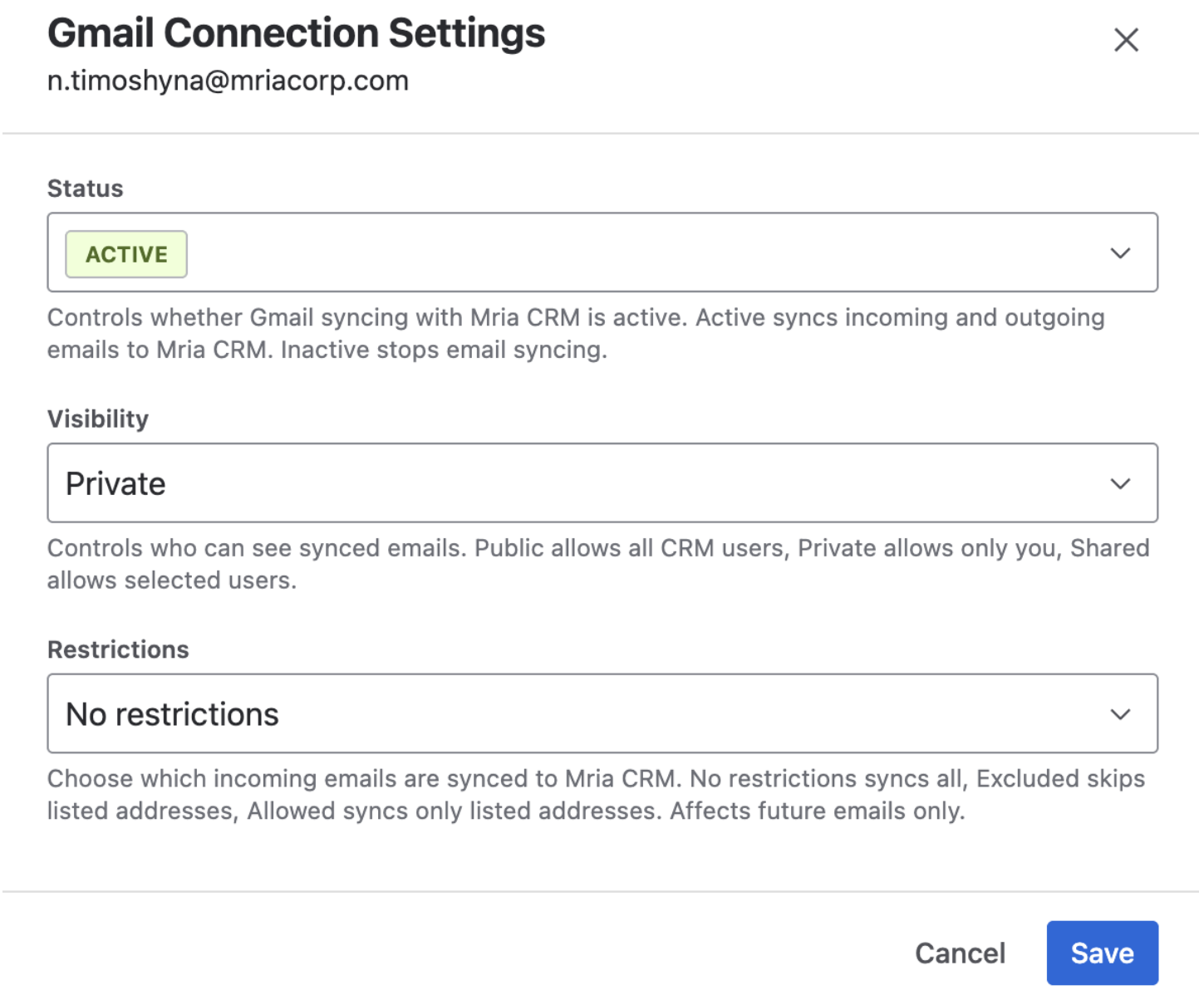
- **Name** and avatar of the Outlook user
- **Email** address

- **Status** — *Active* (sync is running) or *Inactive* (sync is paused)
- **Visibility** — *Private*, *Public*, or *Shared*
- **Last Synced At** — timestamp of the most recent sync
- **Owner** — the Mria CRM user who connected this account
- **Actions** — *Edit* and the `...` menu (Disconnect)

You can only **Edit** or **Disconnect** Outlook accounts that you own. Other users' accounts are visible but read-only.

1.6 Outlook Connection Settings

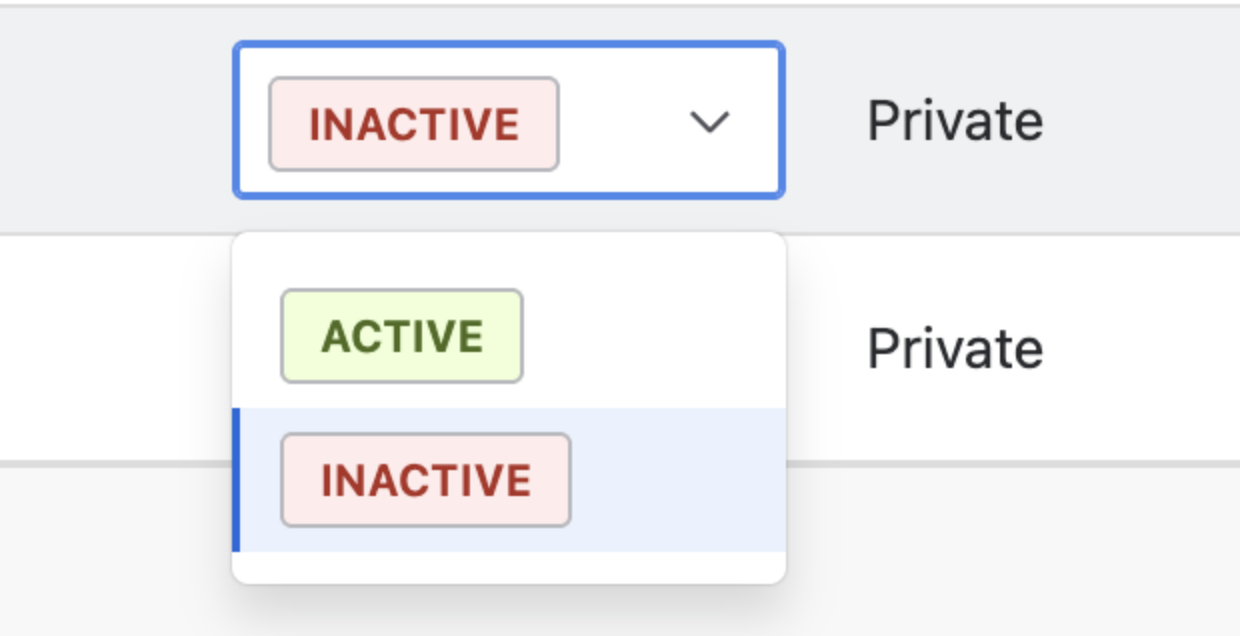
Click **Edit** next to your Outlook account to open the **Outlook Connection Settings** dialog. It controls how the account syncs and who can see the synced emails.



Status

Controls whether Outlook syncing with Mria CRM is active.

- **Active** — incoming and outgoing emails are synced to Mria CRM.
- **Inactive** — email syncing is paused. Already synced emails remain visible in Mria CRM.



Visibility

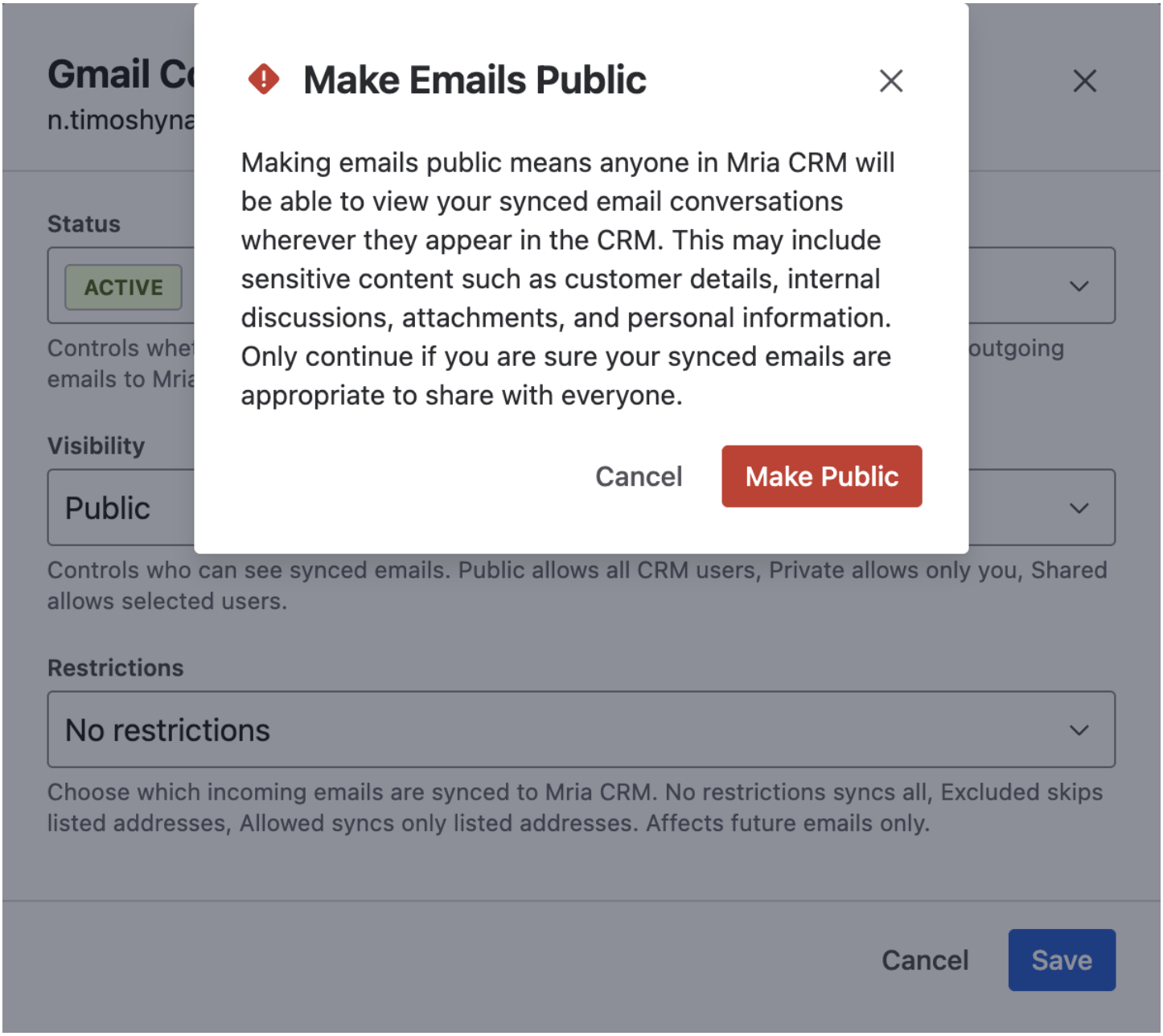
Controls who in Mria CRM can see the emails synced from this Outlook account.

Visibility	Who can see synced emails
Private	Only you (the Outlook account owner).
Public	All users in your Mria CRM site.
Shared	Only specific Mria CRM users you select.

Public visibility

Switching to **Public** opens a confirmation dialog warning that anyone in Mria CRM will be able to view your synced email conversations wherever they appear in the CRM, including potentially sensitive content (customer details, internal discussions, attachments, personal information).

You must click **Make Public** to confirm.

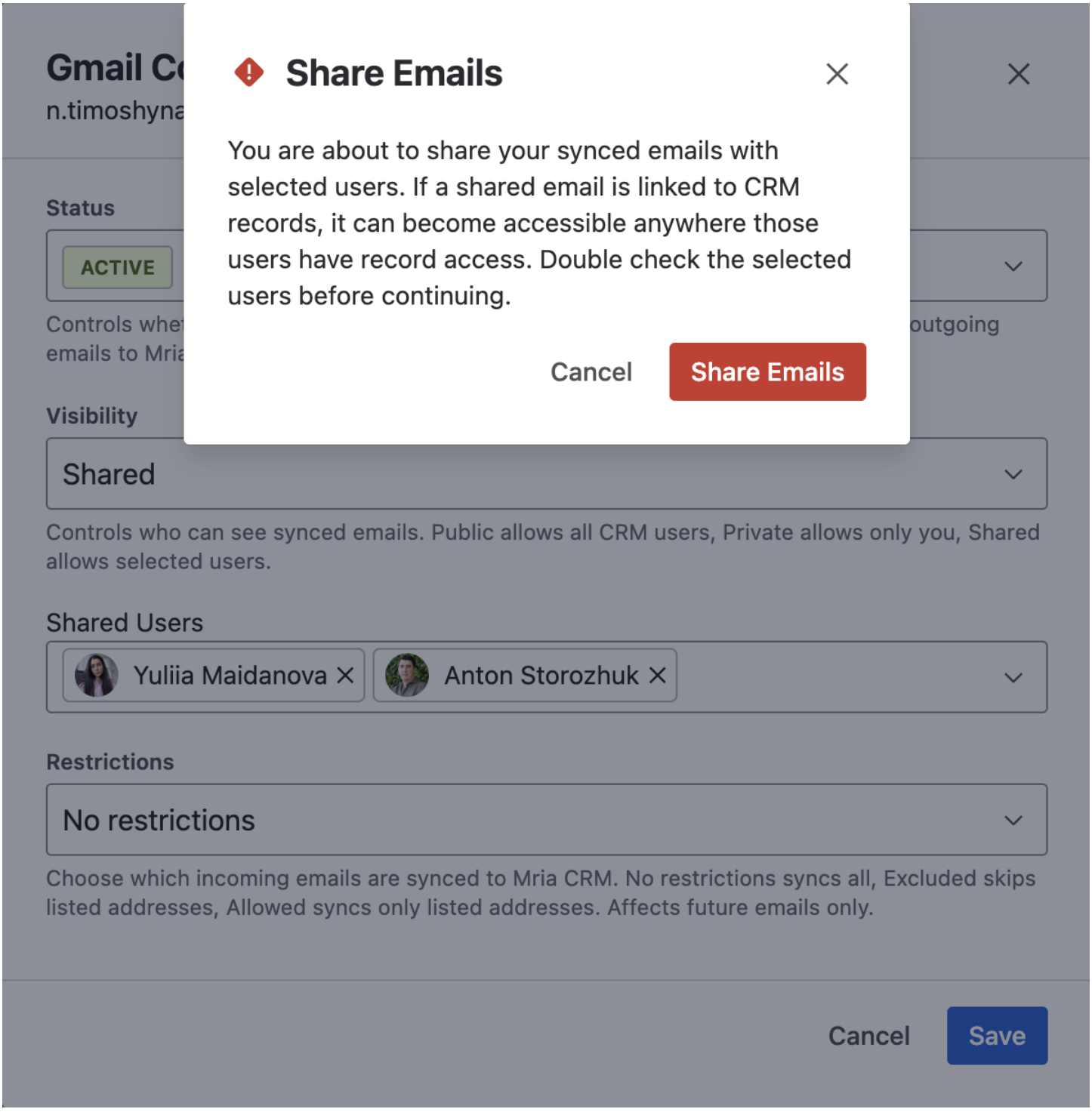


Shared visibility

Switching to **Shared** reveals a **Shared Users** picker where you select specific Mria CRM users.

When you save changes that share emails with new users, a confirmation dialog appears reminding you that shared emails linked to CRM records may become accessible anywhere those users have record access.

You must click **Share Emails** to confirm.

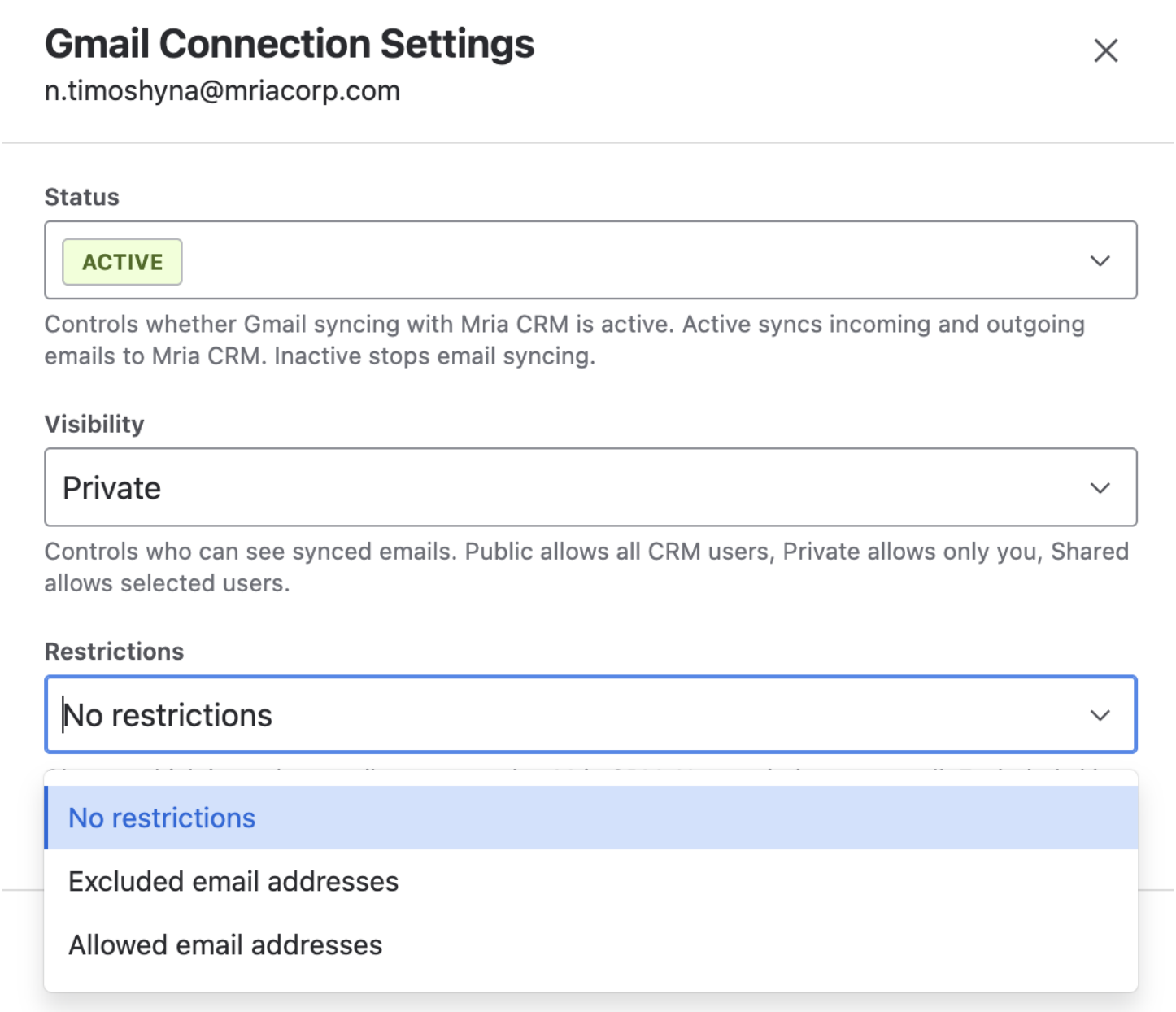


Restrictions

Controls **which incoming emails** are synced to Mria CRM. Restrictions affect future emails only — already synced messages are not removed.

Restriction	Behavior

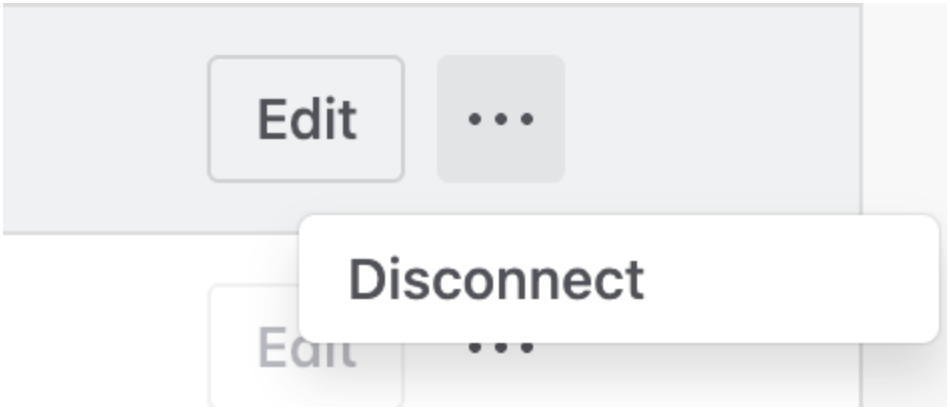
No restrictions	All incoming emails are synced.
Excluded email addresses	Skip emails from addresses you list.
Allowed email addresses	Sync only emails from addresses you list.



Click **Save** to apply changes. **Cancel** discards them.

1.7 Disconnecting an Outlook Account

To disconnect an Outlook account you own, open the `...` menu next to it and select **Disconnect**.

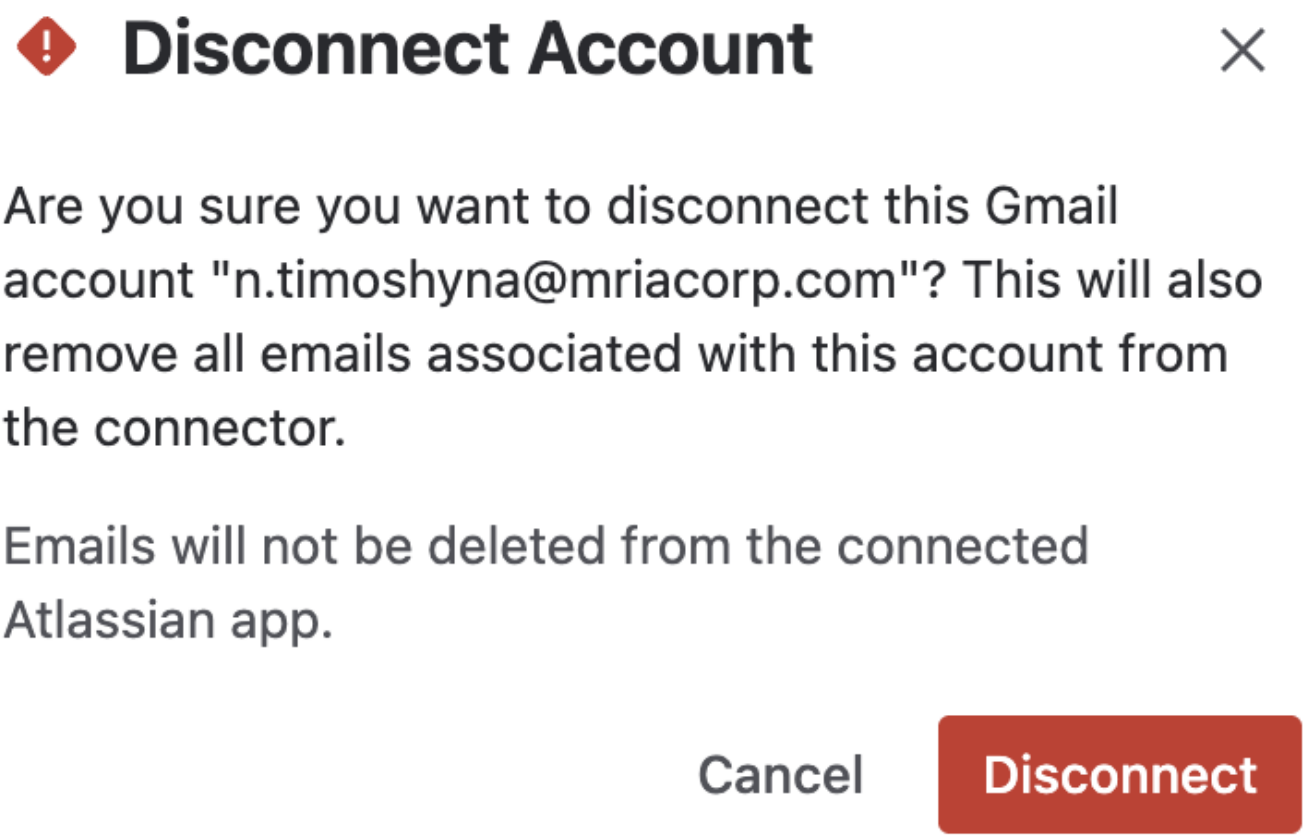


A confirmation dialog appears explaining what will happen:

- The Outlook account is unlinked from Mria Outlook Connector.
- All emails associated with this account are removed from the connector.
- By default, **emails are NOT deleted** from the connected Atlassian app (Mria CRM) — they stay attached to their CRM records.

If your Mria CRM admin has enabled the corresponding global setting (see 1.8 Global Settings), an additional option to also delete synced emails from Mria CRM may appear.

Click **Disconnect** to confirm.



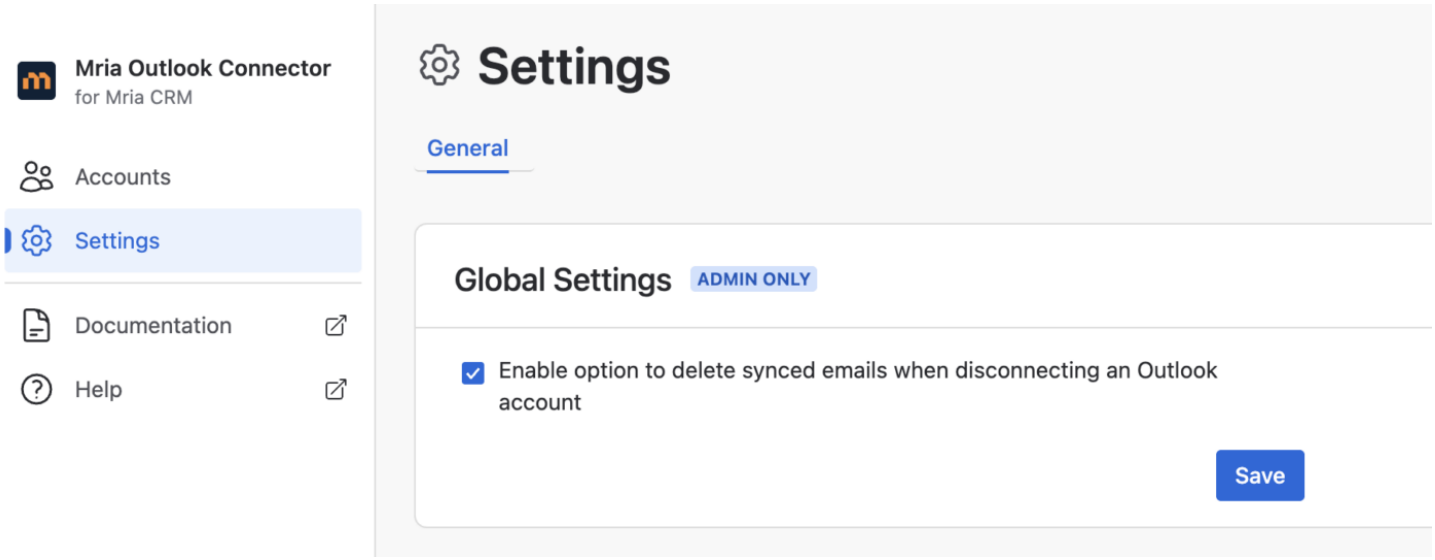
1.8 Global Settings (Admin Only)

The **Settings** tab contains site-wide options that only Atlassian admins can change.

General → Global Settings:

- **Enable option to delete synced emails when disconnecting an Outlook account** — when enabled, users will see an additional checkbox in the Disconnect Account dialog allowing them to also remove synced emails from Mria CRM. By default this option is off, so disconnecting is non-destructive for CRM data.

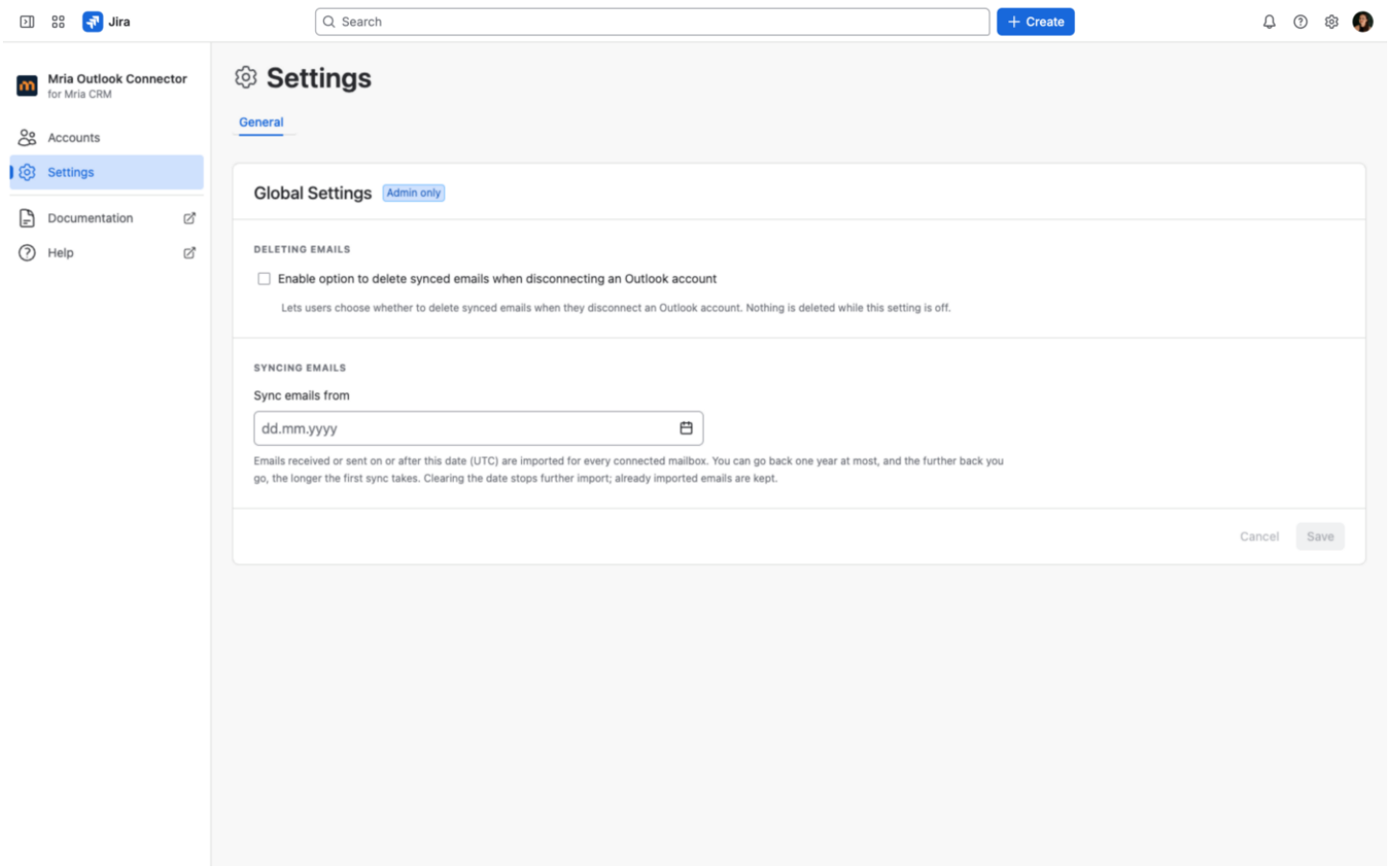
Non-admin users see the Settings page in read-only mode (the **ADMIN ONLY** badge indicates restricted access).



Syncing emails — importing earlier mail

By default a connector only syncs mail that arrives **after** a mailbox is connected, so conversations that predate the connection never reach Mria CRM. **Sync emails from** fills that gap: set a date and the connector imports the history from that point forward.

- Emails **received or sent on or after** the date are imported. The date is read in **UTC**.
- The setting is **site-wide** — it applies to **every connected mailbox**, not just your own.
- You can go back **one year at most**.
- The further back you go, the longer the **first sync** takes. After that, normal five-minute syncing continues as usual.
- Clearing the date **stops further import**. Emails that were already imported stay in Mria CRM — clearing the field is not an undo.



This is an admin-only, site-wide setting, and it pulls real mail into a CRM that other people can read. Before setting a date, check the **Visibility** and **Restrictions** on each connected mailbox (see 1.6) — a mailbox set to **Public** will expose its imported history to the whole workspace.

Part 2. Using Outlook Integration in Mria CRM

Once at least one Outlook account is connected and active, Outlook Integration becomes available inside **Mria CRM** on Contact, Lead, and Deal records.

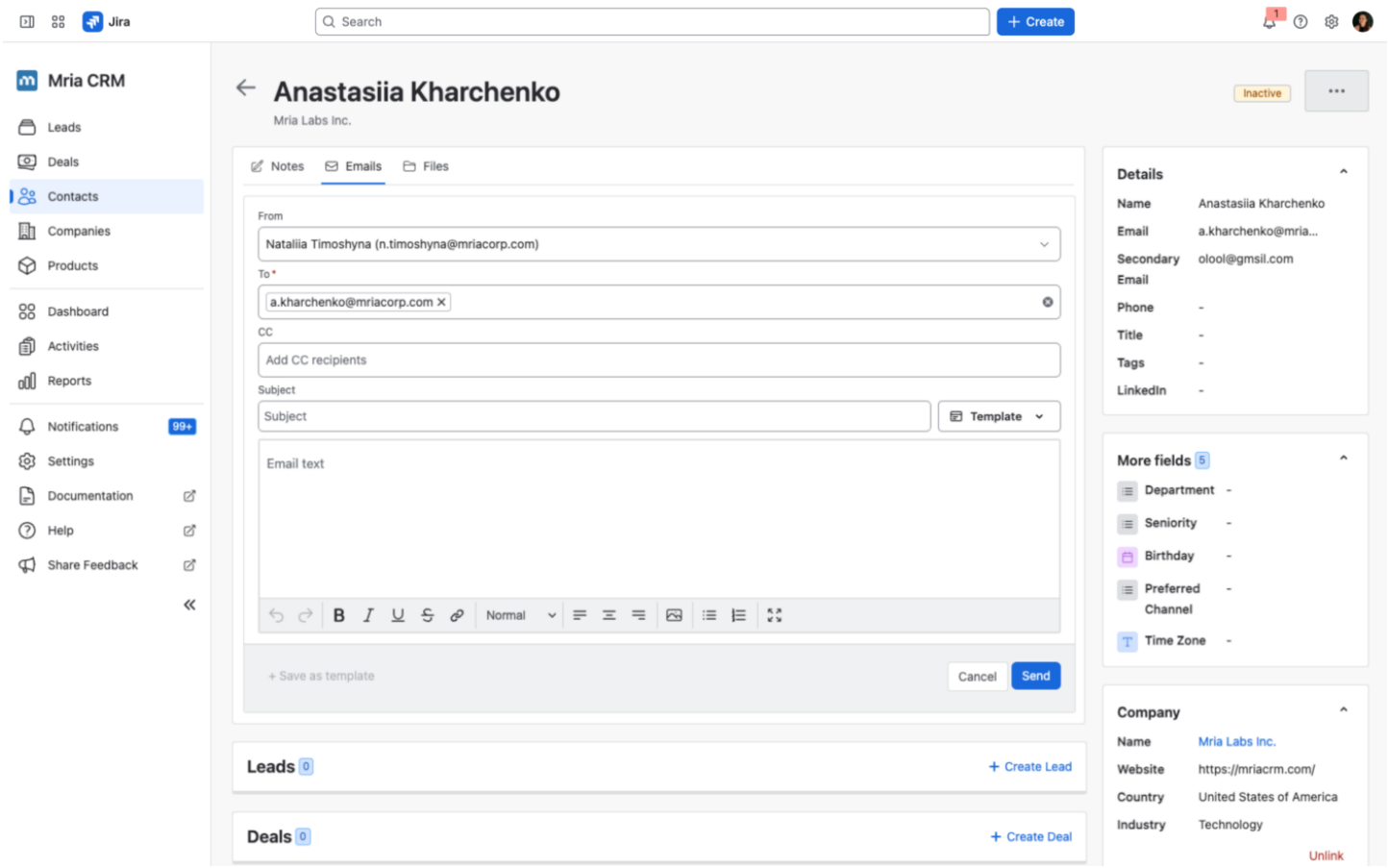
Before any Outlook account is connected: opening the **Emails** tab on a Contact or Lead shows a connector banner with quick links to **Mria Outlook Connector** — one to open the connector app directly, and one to the setup guide. Once an active Outlook account is in place, the banner is replaced by the email composer described below.

2.1 Sending Emails from a Record

You can compose and send emails directly from a CRM record:

1. Open a **Contact**, **Lead**, or **Deal**.
2. Switch to the **Emails** tab in the main panel.
3. Choose the sending Outlook account in the **From** dropdown — the list shows every active Outlook account you can send from (your own accounts plus any account shared with you with send rights)
4. Check the **To** field. It is **pre-filled automatically** from the record you're on — the Contact's email address, the Contact linked to a Lead, or every Contact linked to a Deal. You can remove a recipient with the × on its chip, or add another address if needed.
5. Optionally, add one or more CC recipients to copy others on the email — useful when looping in colleagues or external stakeholders. Each CC address is added as a chip; click the × to remove one..
6. Fill in the **Subject** and the email body — or insert a saved **Template** (see below). The editor supports basic formatting (bold, italic, underline, strikethrough, headings, alignment, bulleted and numbered lists) and **inline images**.
7. Click **Send**.

The email is delivered through Outlook and appears in the record's **Emails** list.



The recipient is taken from the record (the Contact's email, or the Contact linked to the Lead / Deal). Emails sent this way are automatically linked to that record.

Using an email template

The **Template** button sits to the right of the **Subject** field. It opens a picker with your own templates and everything shared publicly in the workspace, plus a **preview filled in for the record you're on** — merge fields like `{{contact.name}}` already resolved, so you see the real email before inserting it.

Insert template fills in the subject and body, which you can then edit before sending. If you've just written something worth keeping, **+ Save as template** in the composer footer turns the current draft into a reusable template.

Templates are shared between Gmail and Outlook — the same set is available whichever mailbox you send from. See Email Templates for creating, sharing, and managing them.

Images in emails

The composer supports **images inside the message body**, so signatures, screenshots, product shots, and other inline graphics survive the trip to the recipient instead of being stripped out. Images are also preserved when you **reply to** or **forward** a message.

Images render inline in the **Emails** list too, so a synced message looks in Mria CRM much like it does in the mailbox.

> Only image types the connector considers safe are embedded. Anything outside that set is handled as a regular attachment rather than rendered in the body.

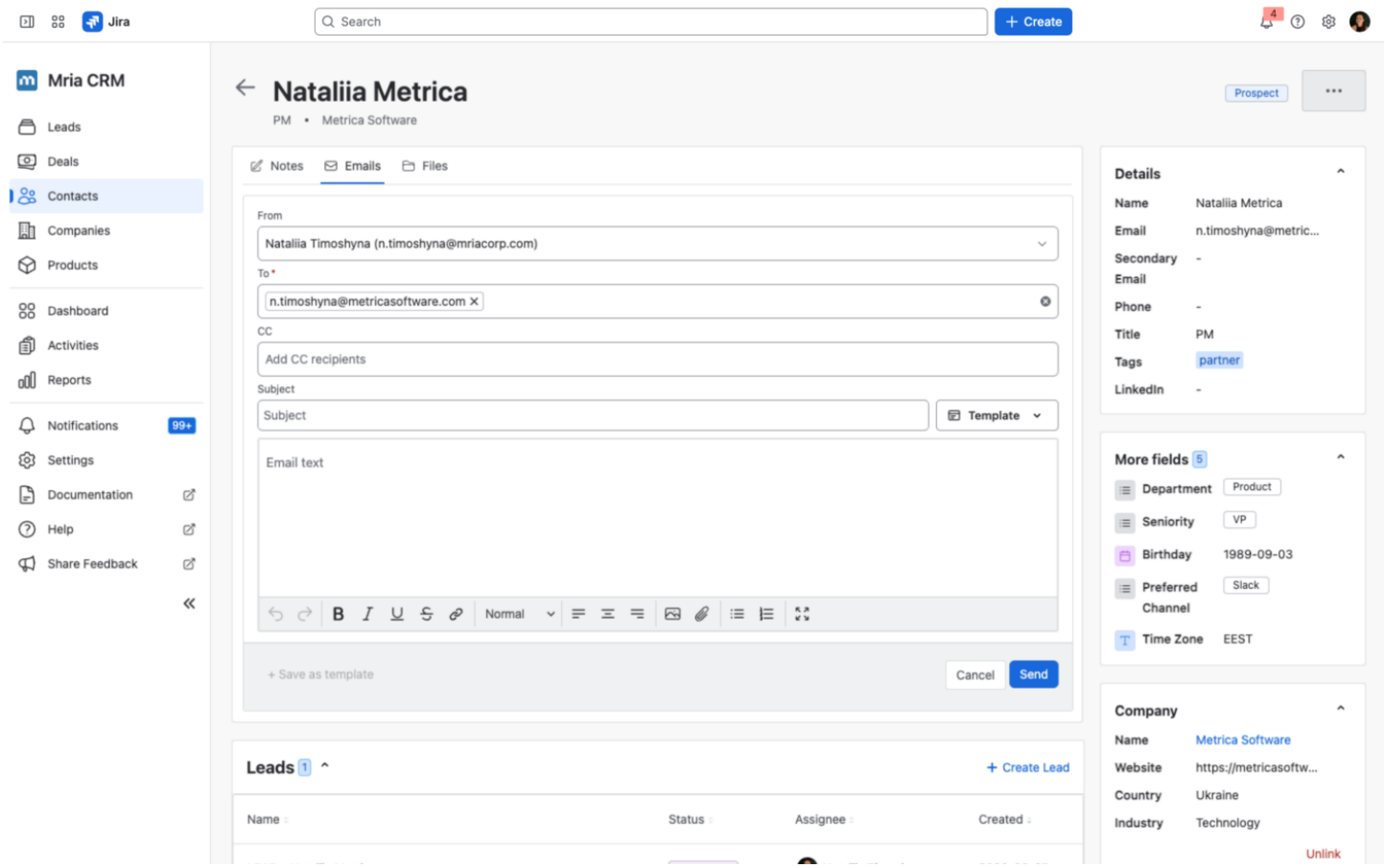
Attachments

Alongside inline images, the composer can attach files to the message. Click the **paperclip** in the editor toolbar — **Attach files** — and pick one or more files from your computer.

Accepted file types:

```
.pdf  .doc  .docx  .xlsx  .txt  .csv  .png  .jpg  .jpeg  .gif  .json  .zip
```

- Several files can go on one message.
- Attachments travel with the email through the connector, so the recipient gets them as ordinary mail attachments.
- They stay on the synced email in Mria CRM, so the record keeps a copy of what was sent.



The **paperclip** sits next to the image button in the toolbar — the image button embeds a picture **inside** the message body, the paperclip sends a file **with** it.

Attaching a file to an email is not the same as the record's **Files** tab. The Files tab stores documents against the Contact, Lead or Deal itself; an attachment belongs to the one email you send it on.

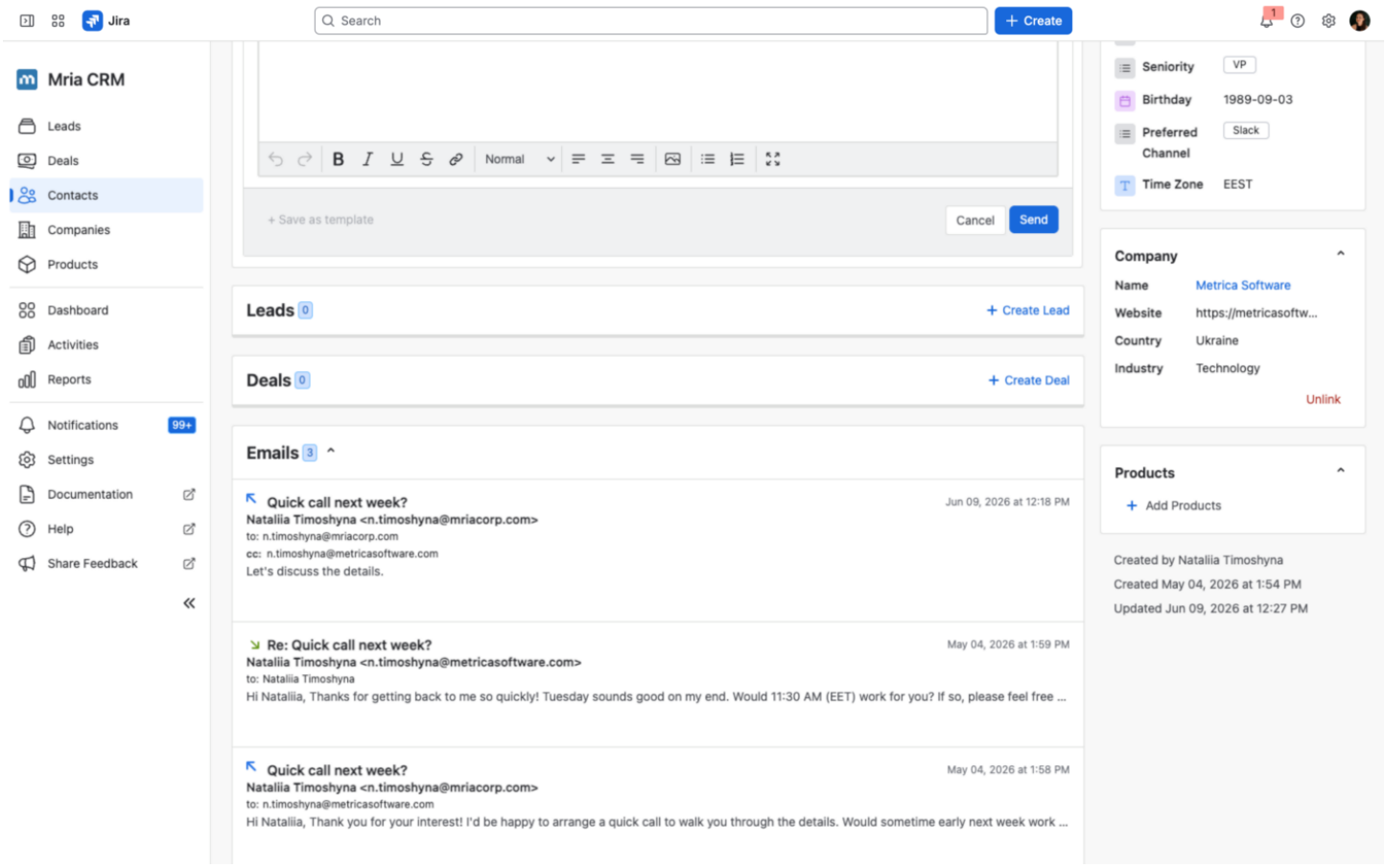
2.2 Viewing Synced Emails

Below the composer, the **Emails** section shows the full conversation history for the record. Each email row displays:

- **Direction icon** — incoming or outgoing.
- **Subject** and **status badge** if applicable (e.g. *Pending*).
- **Sender** name and address, with the **to:** recipient on the next line, and **cc:** where present.

- **Date and time**.
- A short **preview** of the message body.

Long threads are paginated.



2.3 Replying, Forwarding and Unlinking Emails

Each synced email row has its own actions — the **Reply** button and a `…` menu with **Reply all**, **Forward**, **Unlink**, and **Delete**.

Reply, **Reply all** and **Forward** open the composer prefilled from the original message (Reply → the sender; Reply all → the sender and all other recipients; Forward → a new recipient). These actions are available **only to users who are in the email loop** (the sender, a recipient, or someone on CC) — for anyone outside the loop they are blocked.

Unlink from Contact / Lead / Deal removes the email from **this record only**. The email stays in Mria CRM and remains visible on every other Contact, Lead, or Deal it is linked to — unlike **Delete** (see 2.5), which removes it from Mria CRM entirely. This is especially useful for Deals: when an email

belongs on a Contact but has nothing to do with a particular Deal it was auto-linked to, you can unlink it from the Deal while keeping it on the Contact.

2.4 Email Statuses and Sync Behavior

Emails sent from Mria CRM go through a short delivery flow:

- **Pending** — the email has been queued and will be sent on the next sync cycle.
- **Not sent** — the email could not be sent because the Mria Outlook Connector license has expired. It stays queued; see below.
- No badge — the email has been sent and confirmed by Outlook.

[Outlook Integration: Email Statuses and Sync Behavior]

Sync schedule

Mria Outlook Connector syncs **every 5 minutes** in both directions:

- **Outgoing** — pending emails composed in Mria CRM are picked up and sent through Outlook.
- **Incoming** — new messages in Outlook (matching your Visibility and Restrictions settings) are imported into Mria CRM and linked to the matching Contact or Lead by email address.

If a synced email matches multiple records, it is shown on each of them.

Because sync is interval-based (not real-time), it can take up to 5 minutes for a sent email to appear with no badge, or for a freshly received email to show up in the record.

When the Mria Outlook Connector license has expired

Sending from Mria CRM goes through the connector, so it stops when the connector's license lapses. Mria CRM says so on the Emails tab of every record, above the composer:

> **Sending is paused — your Mria Outlook Connector license has expired**
> New emails will not be delivered until the license is renewed. Emails already in Mria CRM are unaffected.

Administrators get a link to renew the license. Everyone else is asked to contact a site admin.

An email that was already queued shows **Not sent** instead of Pending, with the reason and the date the license expired. Leave it there: once the license is renewed it is sent on the next sync cycle, with no retyping — sending it again by hand would deliver it twice.

Reading is not affected. Emails already synced stay on their records, with their attachments and images.

2.5 Deleting a Synced Email

You can remove a synced email from Mria CRM directly from the Emails tab on a Contact, Lead, or Deal.

1. Find the email in the Emails list and open the … menu on that email.
2. Click Delete.
3. In the Delete this email? dialog, review what will happen, then click Delete to confirm — or Cancel to keep the email.

[Outlook Integration: Deleting a Synced Email]

Deleting removes the email from Mria CRM and cannot be undone:

- The email and any attachments are removed from Mria CRM.
- If the email is linked to more than one record (Contact, Lead, or Deal), it is removed from all of them.
- The original message is not deleted from your mailbox — it stays in the connected email account.

Only an admin or the owner of the connected mailbox can delete a synced email.

Together, **Mria Outlook Connector** and **Mria CRM** keep your Outlook conversations and your CRM records aligned automatically — without leaving Atlassian. For broader CRM functionality, see Contacts, Leads and Deals.