

Installation Guide

The Dataverse Mail Client is distributed as a managed solution ZIP file containing the PCF control. Apply it to any entity form in minutes.

1 Download the Solution

Download the latest `DataverseMailClient_managed.zip` file from the releases page. This is a Dataverse managed solution that contains the PCF control and the `dis_mailclientsetting` configuration table.

2 Import into Dataverse

Go to **Power Platform Admin Center** or the `make.powerapps.com` portal:


1. Navigate to **Solutions** in the left sidebar.
2. Click **Import solution** at the top.
3. Click **Browse** and select the downloaded ZIP file.
4. Click **Next**, then **Import**.
5. Wait for the import to complete (typically 1–2 minutes).

 If you see a warning about existing components, choose **Upgrade** to replace the previous version while keeping your data.

3 Add the Control to an Entity Form

The PCF control can be added to any **entity form** — Account, Contact, Case, or any custom table. It uses a virtual control binding, so it does not require a specific field.

1. Open `make.powerapps.com` and navigate to your app.
2. Edit the form where you want the email client to appear.
3. Add a new **1-column tab** (recommended) or section to the form.
4. Inside the section, add a **text field** (or any existing text field) — this serves as the binding anchor.
5. Select the field, then click + **Component** in the properties panel.
6. Click **Get more components** and search for "emailclient" or "Mail Client".
7. Select the **Dataverse Email Client** control and click **Add**.
8. Save and **Publish** the form.

 Make sure the form tab and section have enough vertical space. We recommend setting the tab to use the full available height so the email client has room for its three-panel layout.

4 Create a Mail Client Setting Record


The control reads its configuration from the `dis_mailclientsetting` table. Create at least one record:

FIELD	DESCRIPTION	REQUIRED
<code>dis_enabledataverseaihelper</code>	Set to Yes to enable AI features (requires Dataverse AI Helper app)	No
<code>dis_aitemplatestouse</code>	Comma-separated list of document processing template IDs to make available	No
Related Queues	Associate Dataverse queues to expose them as shared mailboxes in the sidebar	No

 Without any Mail Client Setting record, the control still works with your personal mailbox. The setting record is only needed for shared mailboxes and AI features.

5 Verify & Start Using

Open a record with the form you just customized. You should see the email client loaded in the designated tab. Your personal inbox will display automatically. If you configured shared queues, they will appear in the sidebar.

 Make sure users have the necessary **security role privileges** on the `email`, `activitymimeattachment`, `queue`, `queueitem`, and `emailsignature` tables for full functionality.