

Mailbox & Queue Setup for Shared Mailboxes

To use shared mailboxes (like support@company.com or sales@company.com) in the Dataverse Mail Client, you need to configure server-side sync and Dataverse queues. Here's a complete walkthrough.

Part A — Create a Shared Mailbox in Microsoft 365

If you don't already have a shared mailbox, create one in Exchange / Microsoft 365 Admin Center.

1. Go to admin.microsoft.com → **Teams & groups** → **Shared mailboxes**.
2. Click **Add a shared mailbox**.
3. Enter a display name (e.g. "Support") and an email address (e.g. support@yourcompany.com).
4. Click **Save changes**. The shared mailbox is ready.
5. Under **Members**, add the users who should have access to this mailbox.

Part B — Create a Queue in Dataverse

Dataverse Queues are what the Mail Client uses to display shared mailboxes. Each queue maps to one shared mailbox.

1. In your Model-Driven App, navigate to **Settings** → **Business Management** → **Queues** (or go to **Advanced Settings** → **Service Management** → **Queues**).
2. Click **New** to create a new queue.
3. Fill in the details:
 - **Name**: A descriptive name (e.g. "Support Queue").
 - **Incoming Email**: Set to the shared mailbox email address (support@yourcompany.com).
 - **Type**: Select **Private** — this ensures only designated members can see emails in this queue.
4. Save the queue.



Private vs Public Queues: Private queues restrict visibility to queue members only. This is recommended for shared mailboxes to ensure only authorized team members see the correspondence.

Part C — Add Queue Members

For private queues, you must explicitly add users who should have access.

1. Open the queue you just created.
2. Navigate to the **Members** tab or section.
3. Click **Add Members** and select the users or teams that need access to this shared mailbox.
4. Only these members will see the queue as a mailbox in the Dataverse Mail Client.

Part D — Configure the Mailbox Record for Server-Side Sync

For emails to flow from Exchange into Dataverse, you need a mailbox record configured for server-side synchronization.

1. Go to **Advanced Settings** → **Email Configuration** → **Mailboxes**.
2. Find the mailbox record that corresponds to the queue's email address. If it doesn't exist, it may have been auto-created when you saved the queue — search for the email address.
3. Open the mailbox record and configure:
 - **Server Profile**: Select your Exchange Online (or on-premises) server profile.
 - **Incoming Email**: Set to **Server-Side Synchronization** or **Email Router**.
 - **Outgoing Email**: Set to **Server-Side Synchronization** or **Email Router**.
4. Click **Approve Email** (requires System Administrator role).
5. Click **Test & Enable Mailbox**.
6. Wait for the test to complete. Both incoming and outgoing should show **Success**.



The mailbox test may take a few minutes. If it fails, verify that the server profile is correctly configured and that the shared mailbox is accessible from Exchange. Check the **Alerts** section on the mailbox record for specific error details.

Part E — Link the Queue to the Mail Client

Finally, connect the queue to the Dataverse Mail Client so it appears in the sidebar.

1. Open the `dis_mailclientsetting` record (create one if it doesn't exist yet — see [Installation Step 4](#)).
2. In the **Related Queues** sub-grid, add the queue(s) you created.
3. Save the record.
4. Refresh your Model-Driven App form. The queue(s) should now appear as separate mailboxes in the sidebar, below your personal mailbox folders.



You can add multiple queues to a single Mail Client Setting record. Each queue appears as its own mailbox with Inbox, Sent, and Drafts folders.

Configuration Summary

