

Outlook 365

The Outlook 365 integration connects your organization's Microsoft Exchange accounts to Alchemer Voice. It enables single sign-on (SSO) through Microsoft Entra ID and keeps your Outlook calendars and mailboxes in sync with Alchemer Voice.

If your organization uses the Alchemer Voice Notetaker, this connection lets your team capture, record, and analyze external meetings automatically, directly from Outlook, without setting up each meeting by hand.

Who this integration is for

This integration is a good fit for anyone who schedules or attends meetings with people outside your company, including Product, Sales, Customer Success, and Research teams. If you want to automate meeting recording and analysis using your Outlook calendar, this integration is built for you.

What you can do with the Outlook integration

- Sign in to Alchemer Voice with your Microsoft Entra ID account using SSO.
- Sync your Outlook calendars to Alchemer Voice so no external meeting goes uncaptured.
- Automatically record external meetings with the Alchemer Voice notetaker.
- Choose exactly which meetings the notetaker joins using flexible participation modes.
- Skip manual invite steps. Alchemer Voice watches your Outlook calendar and joins meetings based on the rules you set.
- Sync your Outlook mailboxes to Alchemer Voice so every customer conversation is captured.

How it works

Connecting your Outlook calendar

When you connect your Outlook calendar to Alchemer Voice:

1. SSO is enabled, so your users sign in to Alchemer Voice with their Microsoft Entra ID credentials.
2. Alchemer Voice reads calendar events for every user in your Alchemer Voice account, so meeting data stays current.
3. The notetaker can join meetings automatically based on the participation mode you choose (see the modes below).
4. You can also tell the notetaker to join any meeting manually at any time, even after it has already started, from the Alchemer Voice conversations area.
5. The notetaker records, transcribes, and analyzes the meeting in your Alchemer Voice

workspace.

Participation mode	What the notetaker does
Manual	Joins only the meetings where you explicitly invite it, by adding the Alchemer Voice notetaker email address to the calendar invitation.
Organizer	Automatically joins external meetings that you organized. Alchemer Voice detects which meetings include outside guests.
All external meetings	Joins any external meeting you are invited to, including meetings set up by customers.

Connecting your Outlook mail

When you connect your Outlook mail to Alchemer Voice:

1. SSO is enabled, so your users sign in with their Microsoft Entra ID credentials.
2. Alchemer Voice reads mailboxes for every user in your Alchemer Voice account.
3. Alchemer Voice creates conversations and insights from every email thread that involves a customer.

Common use cases

- Automatically capture and analyze customer email threads, calls, and demos, including meetings scheduled by your prospects.
- Reduce meeting setup effort by letting Alchemer Voice handle meeting joining based on your Outlook calendar.
- Use SSO to standardize team access and simplify onboarding and offboarding.

Frequently asked questions

Do I have to use SSO if I connect Outlook?

Yes. Connecting Outlook enables SSO for all users.

Can I control which meetings are recorded?

Yes. Each user can switch between Manual, Organizer, and all external meeting modes in their profile settings. When new users are invited to Alchemer Voice, they are asked which method they prefer.

How do I manually add the notetaker to a one-off meeting?

Invite the Alchemer Voice notetaker email address to the meeting, or use a join link at any time.

Does the integration capture internal meetings?

No. Alchemer Voice joins only meetings that include external participants, unless you request otherwise.

Can I use this with multiple calendars?

Alchemer Voice syncs the primary Outlook calendar for each user who connects their account.

Which email threads are imported?

Alchemer Voice imports only email threads that involve leads and contacts already tracked in your CRM. It automatically syncs the relevant conversations and links them to the matching CRM records. It does not import all of your email, only the threads associated with people and accounts your CRM recognizes. This is the same technique used by services such as HubSpot and Salesforce Einstein.

Getting started

1. In Alchemer Voice, open your connection settings.
2. Connect your Microsoft 365 Mail and Calendar accounts.

That is all that is required. Alchemer Voice begins syncing and joins the right meetings for you. After setup, meeting capture is hands-free and all insights flow directly into your Alchemer Voice workspace.

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