Ms Exchange Office 365 CRM

Ms Exchange, Outlook and Office 365 are email clients operated by Microsoft, well known for their superior UI and business utility.
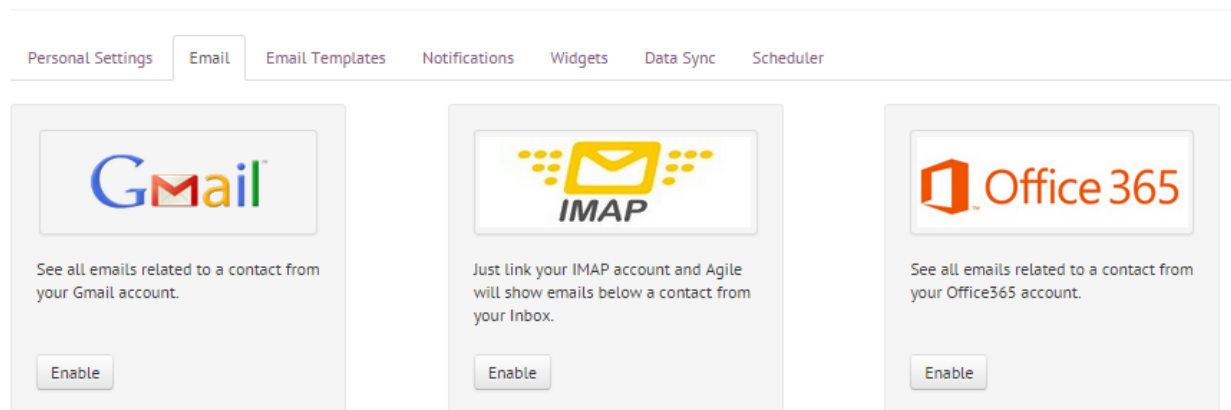
Agile CRM's Exchange Office 365 integration enables you to view all your email interaction with the CRM contacts from your email client, right from the CRM dashboard. You never have to go through the long, painstaking method of reviewing your interaction with each CRM contact email, in your mailbox.

Here's a detailed setup description of Agile's Ms Exchange integration:

1. Locate the Exchange Office 365 integration
Add the widget from the '+ Manage Widgets' button on any contact page, or go to Preferences page ---> Email and find the Office 365 integration over there. Click on the 'Enable' button to start integrating it with Agile.

2. Link your Email Client
A new window (shown in the image) shows up on clicking the 'Enable' button. Enter your Server Host name, your Email client User-name and password in the fields shown. Tick the 'Use SSL' for secure connection. Now, save your details. That's it!

Preferences

Office 365

Server (Host) *

Server URL

User Name *

vijay_veerubhotla@yahoo.in

Password *

••••••••

☑ Use SSL (Secure communication)

[Save]   [Cancel]

3. View your Email interaction with your Contacts
Now that the Exchange Office 365 integration is set, go to any contact page to see all the emails, from your mailbox, related to the contact under the Mail tab. Incase, you have integrated multiple email clients to your Agile account, select your email id from the drop-down, under the Mail tab to look at all the emails sent & received, from that particular email.

You can sync your Agile with Ms Exchange, Outlook and Office 365 and it can be a 2-way sync.

Related Links:
[Exchange Office 365 Integration - Agile CRM](#) ([blog](#))
[IMAP Email - Agile CRM Integration](#) ([blog](#))
[Google Apps - Agile CRM](#) ([blog](#))