

## 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.

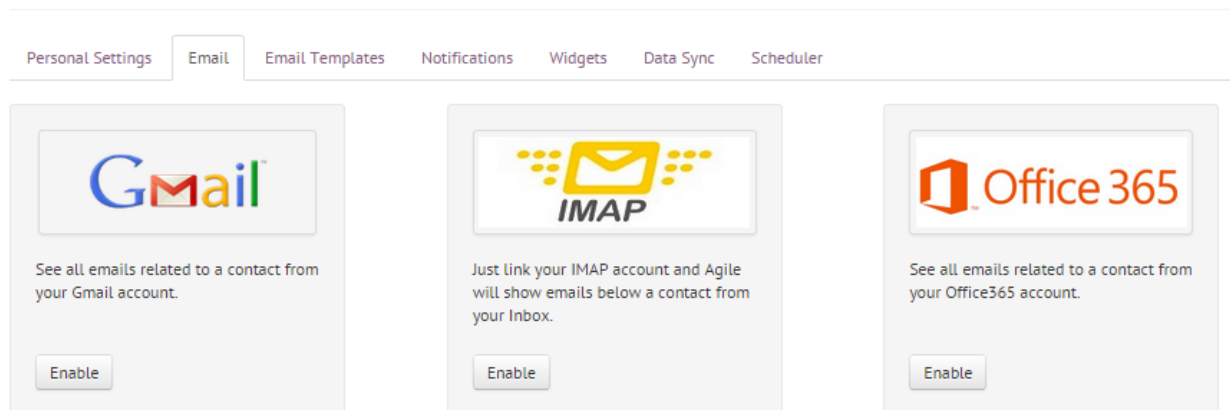
Agile CRM's Exchange Office 365 integration enables you to view all your email interaction with the CRM contacts from your email client, right from the CRM dashboard. You never have to go through the long, painstaking method of reviewing your interaction with each CRM contact email, in your mailbox.

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.

## Preferences



The screenshot shows the 'Preferences' page with the 'Email' tab selected. The navigation bar includes 'Personal Settings', 'Email', 'Email Templates', 'Notifications', 'Widgets', 'Data Sync', and 'Scheduler'. There are three integration cards:

- Gmail:** See all emails related to a contact from your Gmail account. [Enable]
- IMAP:** Just link your IMAP account and Agile will show emails below a contact from your Inbox. [Enable]
- Office 365:** See all emails related to a contact from your Office365 account. [Enable]

### 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

Personal Settings

Email

Email Templates

Notifications

Widgets

Data Sync

Online Calendar

## 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. In case, 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.


**Michael Erickson** ★★★★★ 🔥 0  
 Other

[Beta Signup](#) [Domain Owner](#) [Marketing](#) [Goal-popup](#) [Email](#) [Signup](#) [Widgets](#) [Campaigns](#) [Web Rules](#)  
[Workflow-100](#) [WebRule-100](#) [Shift-Transfer](#) [Add tags](#)

Timeline Notes Events Tasks Deals Cases Campaigns Web Stats **Mail** Documents


G+ nick.agilecrm@gmail.com

↩ **Re: A few things I'd like to do with Agile**


Hi Michael, thanks for your note. I am cc'ing our customer support rockstar; he will get back to you soon.

Hi Raja - please help; the user signup for a trial at Agile CRM.


about 22 hours ago

↩ **A few things I'd like to do with Agile**


Hi Rehan & Nick, I hope you guys are having a great day, whether you be in the USA, Philippines, or India - all awesome locations!

Here are few things I'd like to accomplish with AgileCRM

about 22 hours ago

↩ **Re: Agile CRM - I'm your dedicated Account Representative**


Hi Michael,

Thanks very much for the quick response!

a day ago

**Contact Michael**

+18883393035

michael@searchscientists.com

Company Size 1 Only

Users 1

original\_ref

https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=d=3&sqi=2&ved=0CCsQFJAC&u%3A%2F%2Fwww.agilecrm.com

chimp-alternative&ei=TIqNVIGfj85Igw:Q&usq=AFQJCNgaku4daIqRRppmVbLk347g&bvm=bv.8182826&cad=rja


Plan Starter

Company Type B2B

Domain searchscientists

Last login 14 Dec 2014

US.



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 \(blog\)](#)