

## Agile CRM IMAP Integration Setup

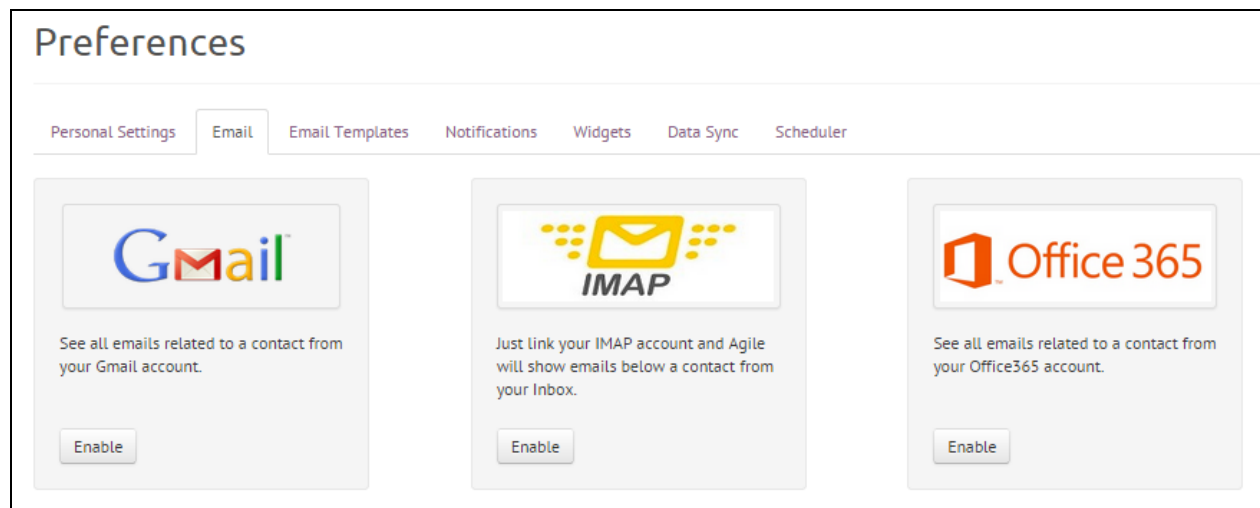
Internet Message Access Protocol (IMAP) is a protocol for email retrieval and storage. It is an Application Layer Internet protocol that allows an email-client to access email on a remote mail-server.

Agile CRM's IMAP integration lets you see 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 IMAP integration:

### 1. Locate the IMAP integration

Add the widget from the '+ Manage Widgets' button on any contact page, or go to the Preferences page ---> Email and locate the IMAP integration. Click on the 'Enable' button on the integration to start integrating your email client with Agile CRM.



**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.

# Preferences

Personal Settings | **Email** | Email Templates | Notifications | Widgets | Data Sync | Online Calendar

## IMAP

Server (Host) \*

User Name \*

Password \*

Use SSL (Secure communication)

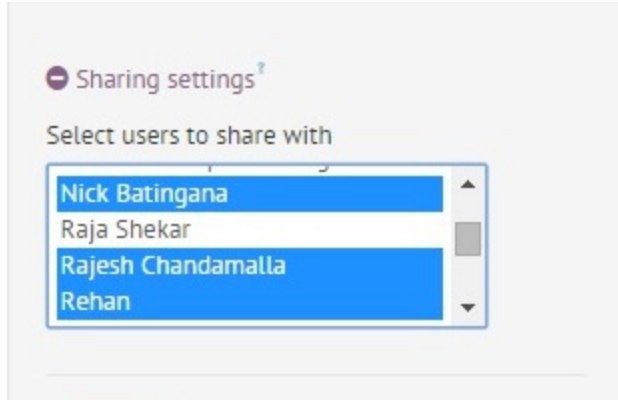
[+ Sharing settings?](#)

[+ Email folders](#)

### 3. Share email interaction with your customers, among the CRM users (optional)

Agile's IMAP integration allows for sharing the emails retrieved from the mailbox of a particular CRM user, with other CRM users. This is a very unique feature in Agile.

Click on the 'Sharing Settings' link (shown in the image) and you'll see the list of all the CRM users. Choose all the CRM users you'd like to share your email conversations with (See the image below). (You can choose to skip step 3 if you don't want to share emails.)

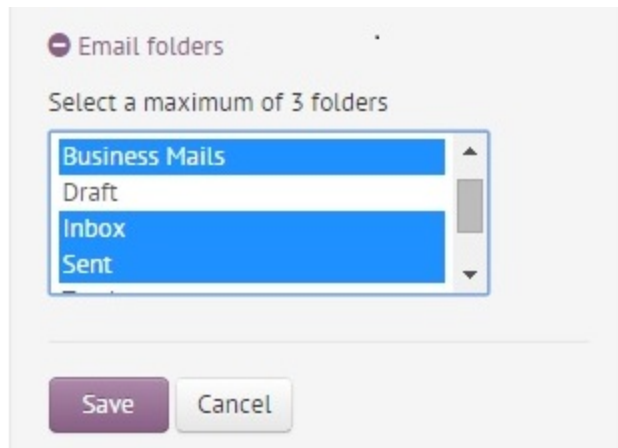


(Use 'Ctrl' button)

**4. Choose your mailbox folders in the IMAP widget, from which the emails have to be fetched (max. of 3 folders) (optional)**

You can choose the mailbox folders from which the emails have to be fetched. It includes any of the custom folders you may have created in your mailbox. You can choose a max. of 3 folders (See the image below).

Note: Gmail & Office 365 have an 'All Mail' folder in the mailbox by default. Emails will be fetched from that directly. So, we've removed this 'Email folders' option for those integrations.



Once you're done with the above steps, save the details. That's it!

**3. View your Email Interaction with Contacts**

Now that you have integrated your email client with Agile, go to any contact page to see all the emails, fetched 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 view all the emails sent & received, from that particular email.

The screenshot displays the Agile CRM interface for a contact named Michael Erickson. At the top, there is a profile picture, the name 'Michael Erickson', a star rating, and a notification icon. Below the name are several tags: 'Beta Signup', 'Domain Owner', 'Marketing', 'Goal-popup', 'Email', 'Signup', 'Widgets', 'Campaigns', 'Web Rules', 'Workflow-100', 'WebRule-100', and 'Shift-Transfer'. A dropdown menu shows the email address 'nick.agilecrm@gmail.com'. The main area shows three email threads:

- Thread 1:** Subject: 'Re: A few things I'd like to do with Agile'. Content: '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.' Sent 'about 22 hours ago'.
- Thread 2:** Subject: 'A few things I'd like to do with Agile'. Content: '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' Sent 'about 22 hours ago'.
- Thread 3:** Subject: 'Re: Agile CRM - I'm your dedicated Account Representative'. Content: 'Hi Michael, Thanks very much for the quick response!' Sent 'a day ago'.

On the right side, there is a 'Contact Michael' sidebar with the following details:

- Phone: +18883393035
- Email: 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=TlqNVIGfj8SgwrQ&usq=AFOjCNGaku4dalqRRppmVbLk347g&bvm=bv.81828268cad=rja
- Plan: Starter
- Company Type: B2B
- Domain: searchscientists
- Last login: 14 Dec 2014
- Location: US. (Map showing Independence, Coffeyville, Bartlesville)

For email clients other than Gmail & Office 365, emails will be fetched from your chosen mailbox folders. The email conversation between you and the customer will be seen on the contact page by the other CRM users whom you had shared the emails with.

We came up with this feature hoping that it would save your time & effort that can be invested in more worthwhile things. Hope you like this feature.

Related Links:

[IMAP Email - Agile CRM Integration \(blog\)](#)

[IMAP Email Sharing](#)

[Google Apps - Agile CRM \(blog\)](#)

[Exchange Office 365 Integration - Agile CRM](#)

Thanks for checking out!