

Set up Microsoft Exchange and Office 365

Set up the Microsoft Exchange and Microsoft 365 services

Version 7.18



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Set up the Microsoft Exchange and Microsoft 365 services

PRODUCTS: ALL CREATIO PRODUCTS

To set up connection parameters for email providers, a user must have the permission to run the “Access to “Access rights” workspace” (“CanManageAdministration” code) system operation. Learn more about using system operations in a separate article: [System operation permissions](#).

Note. Set up the [Exchange Listener](#) synchronization service before setting up an email provider.

You can add an email service provider using several methods.

Method 1. Add the provider from the [Email] tab of the communication panel



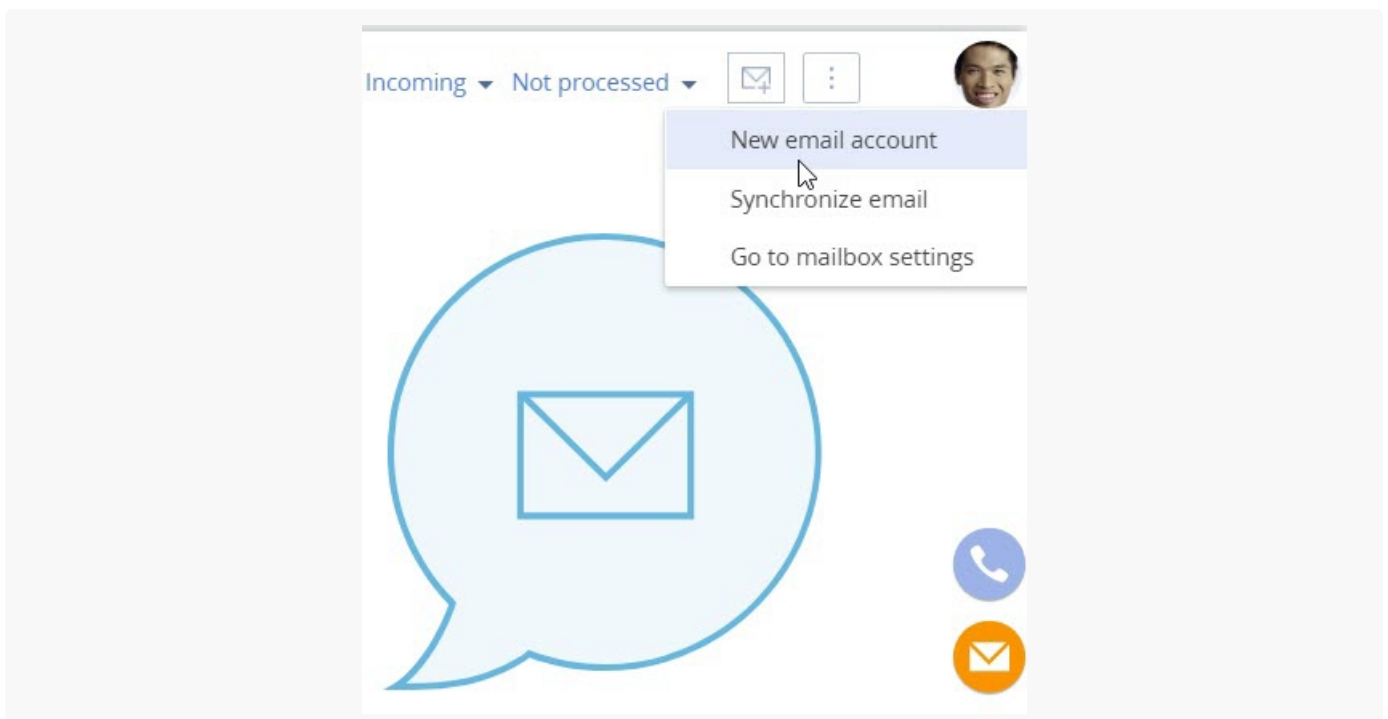

1. Click  in the communication panel to open the [*Email*] tab.
2. Click  and select the [*New email account*] action (Fig. 1).

Fig. 1 Add a new email account



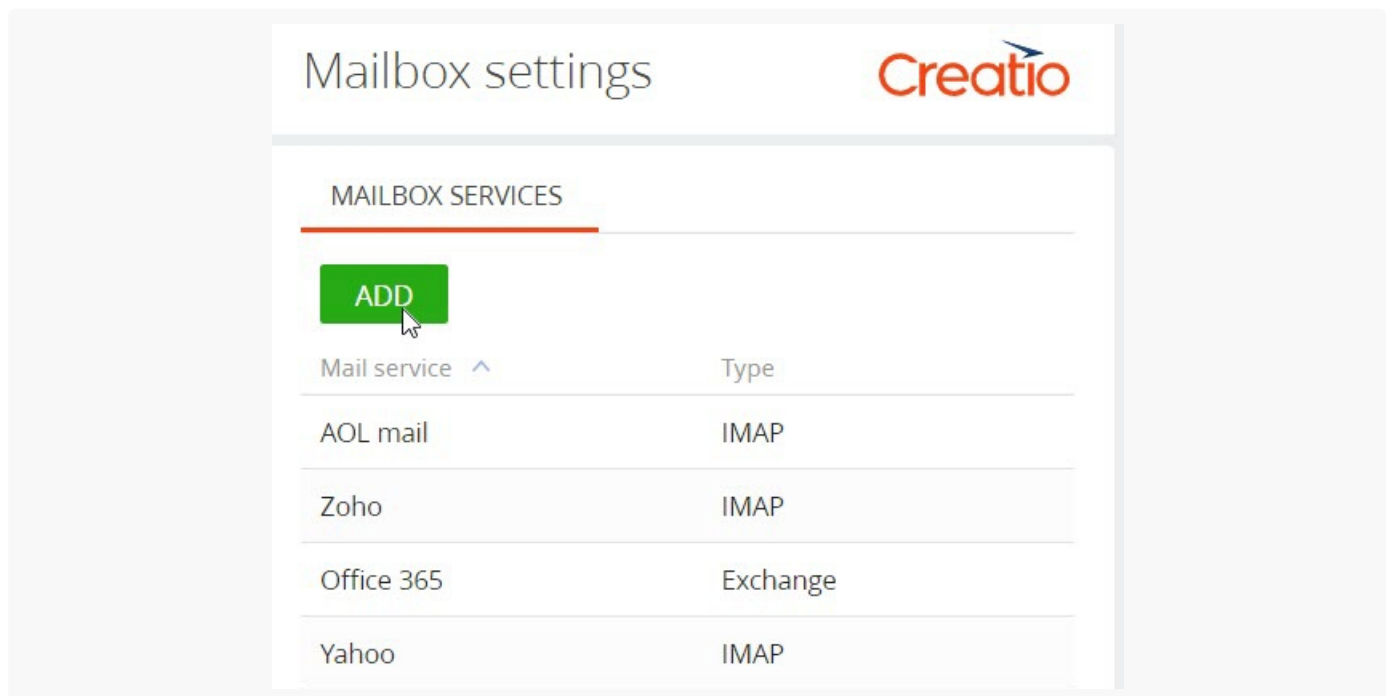
Note. You can also add a new email account by selecting the [*Go to mailbox settings actions*] under  and clicking [*New*] on the page that opens.

3. Enter the email address in the displayed [*New email account*] widow, and click [*Next*].
4. Click the [*Add New Server*] button.

Note. Add the domains of a new provider to the [*Email providers domains*] lookup to have Creatio automatically identify this email provider in the future. As a result, users will not have to specify the mail provider manually when setting up an email account.

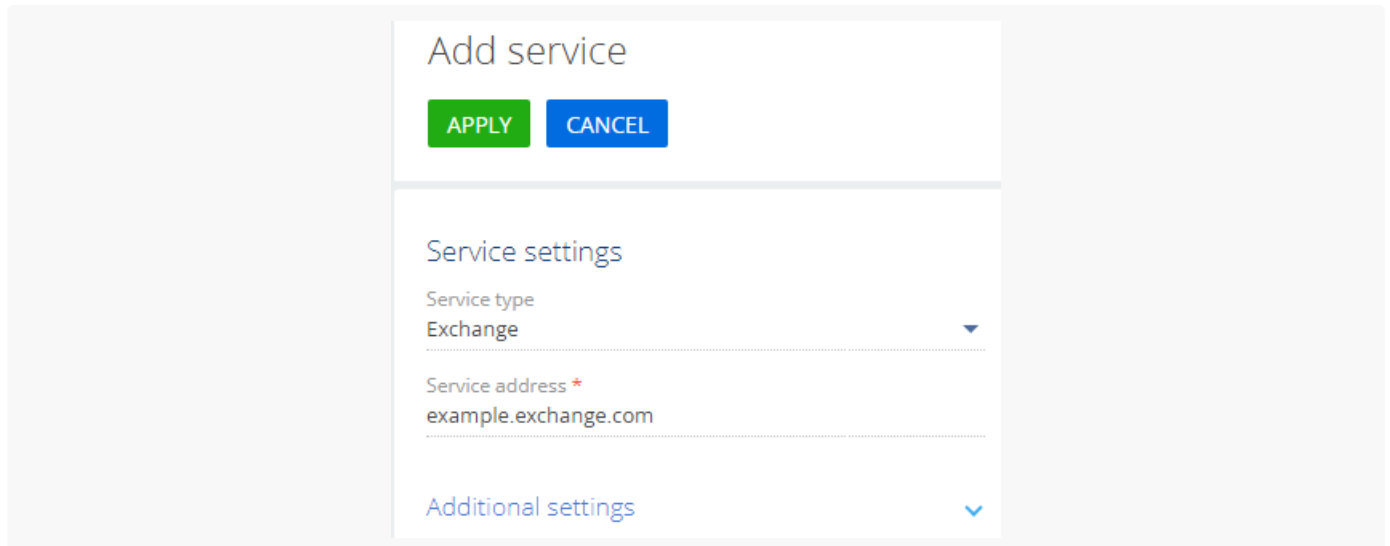
5. Click [*Add*] on the page that opens Fig. 2).

Fig. 2 Add a new email provider



6. Select “Exchange” in the [*Service type*] field on the page that opens.
7. Fill out the [*Service address*] field in the “example.exchange.com” format (Fig. 3).

Fig. 3 Specify the mail service address



The screenshot shows a dialog box titled "Add service". At the top, there are two buttons: "APPLY" (green) and "CANCEL" (blue). Below the buttons is a section titled "Service settings". Under "Service settings", there is a "Service type" dropdown menu with "Exchange" selected. Below that is a "Service address" field with a red asterisk, containing the text "example.exchange.com". At the bottom of the dialog, there is a link for "Additional settings" with a blue downward arrow.

8. Fill out the additional settings to set up receiving and sending emails, specify the login format, service name and the authentication method if needed (Fig. 4).

Note. Setting up passwordless OAuth authentication for Microsoft 365 requires an existing OAuth application. Learn more in a separate article: [Set up OAuth authentication for MS Office 365](#).

Fig. 4 Additional settings of the mail service

Add service

APPLY **CANCEL**

Service settings

Service type
Exchange

Service address *
example.exchange.com

Additional settings

Receive emails

Send emails

Login format
Use email address

Service name *
example.exchange.com

Authentication type
OAuth 2.0

Application (client) ID *
269d98e4922fb3895e9ae2108cbb5064

Client secret *
.....

1. To enable receiving and sending emails

:

Select the [*Receive emails*] and/or [*Send emails*] checkbox.

Select at least one checkbox.

2. To set up the mailbox login format:

- Select [*Use manual entry*] if users must enter their email address and username.
- Select [*Use email address*] option if the full email address is used as a login, for example, "test@google.com."
- Select the [*Use mailbox name*] option if the part of the email address before "@" is used as a login. For example, the "test" will be a login for "test@google.com" email address.

3. To set up the authentication method:

- Select "Basic" for the basic authentication using the user name and password with Base64 encryption.
- Select "OAuth 2.0" to restrict the service access to protected user resources without the need to pass the login and password. Fill out the [*Application (client) ID*] and [*Client secret*] required fields.

[*Application (client) ID*] is generated by the Microsoft authentication server. The documentation and API may refer to the application ID as “Product ID.”

[*Client secret*] – a secret key generated by the authentication server. The documentation and API may refer to the client secret as “Product key.”

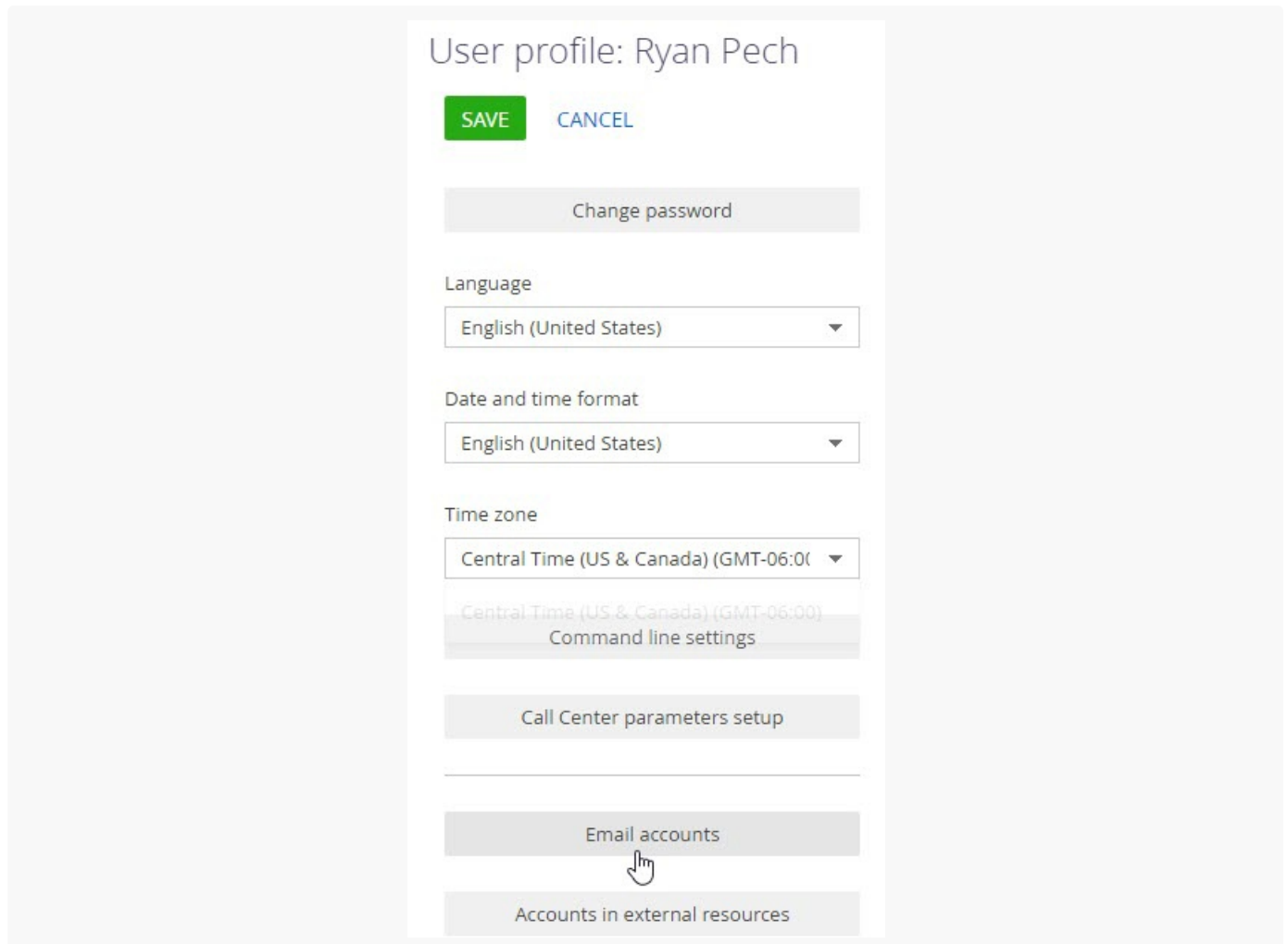
4. Save the settings.

As a result, Creatio users will be able to use the email provider to send and receive email messages.

Method 2. Add the email provider from the user profile

1. Open the user profile page by clicking the [*Profile*] image button on the Creatio main page.
2. Click [*Email accounts*] (Fig. 1). This opens a box

Fig. 1 Open email accounts



3. Click [*New*] in the box that opens.

Take steps 3-9 described above in **Method 1** to complete the setup.

Note. To delete a mail server, delete its mailboxes (email accounts) first.

