

INTEGRATING SAGE CRM TO EXCHANGE 2010 ***

- Ensure CAS (Client Access Server) is enabled on the Exchange server. This performs a number of functions including exposing the EWS virtual directory.
- Domain Administrator credentials, or other credentials with the permission to create and assign roles and scopes.
- Remote PowerShell installed on the computer from which you run the commands.

In the Exchange Management Console:

- Create the Recipient to be used for the sync
- Set the SMTP addresses for the impersonated account to only be [user]@[ADdomain]
- DO NOT hide this account from the Global Address List
- Ensure that the mailbox password does not start with a special character.
- Log in to OWA with this user, so that the mailbox is created

In the Exchange Management Shell.

- Run:
New-ManagementRoleAssignment -Name:<any name> -Role:ApplicationImpersonation -
User:<impersonation user name here>

In the IIS Manager

From **Administration, System, System Behavior**, click the **Change** button.

Set the Use Exchange Server Integration field to **Yes**.

(Note: Once this is set to Yes, it is not recommended to switch it back to No (which re-enables the Classic Outlook Integration feature) unless under guidance from a Sage CRM support professional.)

Click **Save**. A new option menu option called **Exchange Server Integration** is available from **Administration, E-mail and Documents**.

- Enabling Exchange Server Integration also results in the following changes to other areas of Sage CRM: *In Administration, Users, User Configuration, all Classic Outlook Integration plug-in fields are no longer visible. In My CRM, Preferences, the Install / Re-install CRM Outlook Integration button and the Full Menu In Outlook field, are no longer available. Classic Outlook Integration and Exchange Integration cannot be used simultaneously. Any user who tries to work with the Classic Outlook Integration plug-in to connect to Sage CRM, receives an error message.*

In **Administration, Users, Users**, two new fields are displayed:

- Synchronize With Exchange Server (read-only check box)
- Show Exchange Server Integration Logs

(**Note:** Records linked to Outlook clients via Classic Outlook Integration will no longer be synchronized.)

Creating a Connection to the Exchange Server

- To create a connection to the Exchange Server:
Select **Administration, E-mail and Documents, Exchange Server Integration, Connection Management**, and click **New**.
- **Connection Management page**
Enter the Exchange Web Services URL, Active Directory Domain, and Password for the Exchange Server Impersonated User, and the CRM User Name of the CRM user, used to communicate between CRM and the Synch Engine.
- Click **Continue**.
- The Exchange Server Connection and User Mailbox Management tabs are displayed.

Note: The Exchange Integration is not yet enabled for synchronization. Before the synchronization process is enabled, you should first select the user mailboxes that you want to enable for synchronization, and review the synchronization options.

- Click the **User Mailbox Management** tab
- Select the mailboxes that should be synchronized
- Click **Save**
- Click Exchange Server Integration
- Click **Synchronization Management**
- Click **Enable**

*** It is highly recommended to consult with a Sage CRM certified consultant before making any changes to your Sage CRM software.

If you have any questions about Sage CRM, please feel free to contact Ben Hanan with WAC SOLUTION PARTNERS – LOS ANGELES:

Ben Hanan, Business Systems Analyst

5737 Kanan Road # 181 | Agoura Hills, CA | 91301

local: 818.883.0983 | toll free: 866.400.0WAC (0922) | mobile:818.317.7387

