

nexl

Technical Documentation

Security, Integration, and Implementation Information for Microsoft 365

2026 — Reflects Microsoft Entra ID rebrand and current portal navigation

nexl.cloud

Introduction

Nexl's products and services are transforming the way law firms grow, but the backbone of our success is providing a safe and trustworthy place for relationship and contact data. Protecting your and your clients' data is at the core of everything we do, from how we build our products to how we serve our clients. This security-centric approach is one of the many ways we've distinguished Nexl as truly purpose-built for law firms, allowing us to help thousands of lawyers around the globe to better manage their relationships.



How Nexl Works

The core value Nexl provides is to deliver automated systems to track relationship information to save valuable time for you and your lawyers. We achieve this by integrating with your email system, which then informs Nexl of sent and received emails and calendar events. We then use advanced data enrichment to map your firm's relationships and add additional information about your contacts, such as job title, industry, location, and more.

But it's not just our automatic data-capture that sets Nexl apart—it's also the type of data we do (and don't) capture. Our systems only receive header information from your email servers—which means we only process the To, From, Cc, and timestamp. Nexl does not access or process the email's subject, body content, or attachments. This ensures no confidential, privileged, or sensitive matter-specific information is exposed.



Data Enrichment

Using a stateless API, Nexl enriches your data through our own data systems, as well as third-party data providers. With solely an email address, Nexl is able to search for, find, and populate the following attributes:

Companies	
Name	Website
Description	Email
Logo	Phone Number
Employee Count	Address
Year Founded	LinkedIn URL
Industry	Twitter URL
Category	Other Profiles
Keywords	

Contacts	
Name	Website
Age	LinkedIn URL
Location	LinkedIn Bio
Gender	Twitter Username
Education	Twitter URL
Job Title	

Your contacts are fully owned by you. Nexl's data enrichment is a one-way flow in which you receive data from our data enrichment service, but the data enrichment service cannot access data from users (you).

At no point does Nexl use any of your contact information to enrich other organisations' contacts. Each Nexl tenant's data is stored separately, and we keep strict data guards to ensure no data is shared between tenants.

Integration

Nexl integrates with Microsoft 365 and Google Workspace (formerly G Suite), and can also be integrated in a Hybrid Exchange environment. The following sections will review how the Microsoft 365 integration works, as well as the respective steps for setup.

How the Microsoft 365 Integration Works

Nexl uses Microsoft 365's Graph API, which provides a single endpoint to your Exchange service. When connecting Nexl, our Microsoft verified and registered Azure App requests permission to access your Microsoft 365 mail service.

The scope of the permission allows Nexl's system to subscribe to change notifications to a user's mailbox and calendar, and allows the system to retrieve profile information from your Microsoft Entra ID (formerly Azure Active Directory) to identify your internal users. Please note, at all times, Nexl only requests read-only permissions to any of your services. Access to email is also limited to ReadBasicMail, which prevents Nexl from accessing anything beyond the header information.

> Updated: Microsoft rebranded Azure Active Directory (Azure AD) to Microsoft Entra ID in 2023. All references in this document now use the current name. Portal navigation has also changed — see the Setup Guide section.

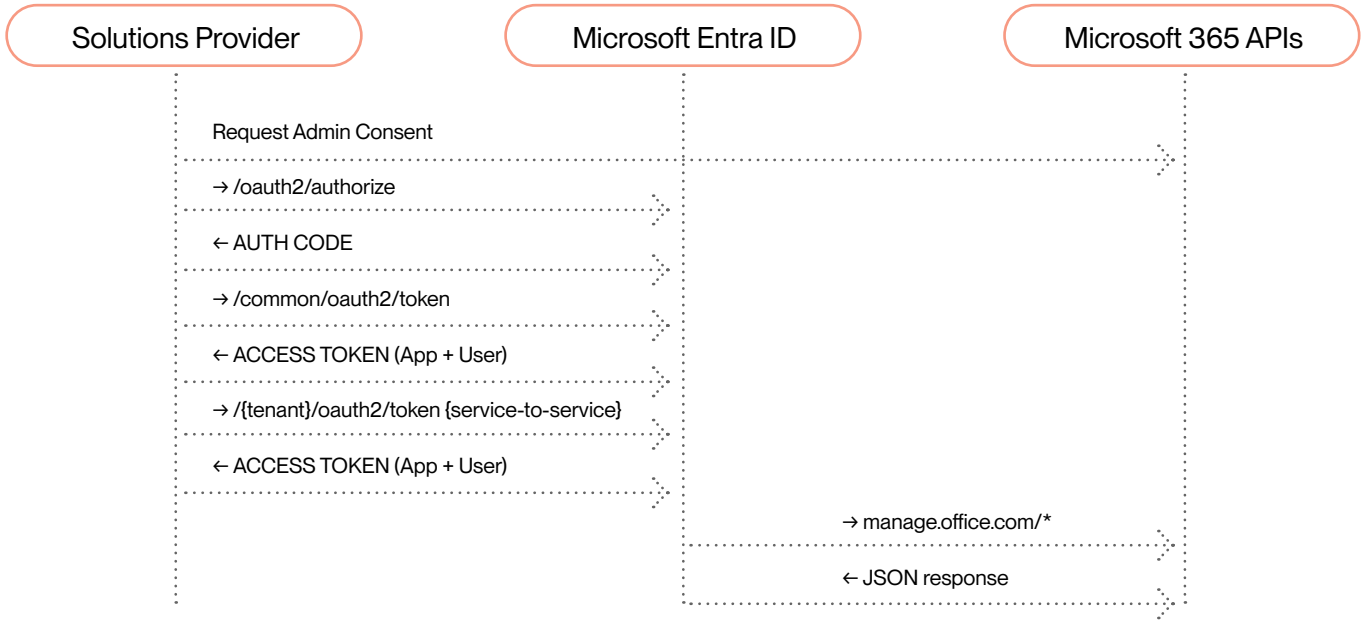
You will always have full control over the connection between your Microsoft 365 tenant and Nexl via your Microsoft 365 admin portal. You can pause or terminate the connection at any time without needing to speak to anyone at Nexl.

Tenant Authentication

Since Nexl requires access to secured Microsoft 365 services, an authentication process is required to show Microsoft 365 that Nexl has rights to access it. The Microsoft 365 Management APIs use Microsoft Entra ID to provide authentication services that Nexl uses to provide these access rights.

Your Microsoft 365 tenant admin must explicitly grant consent to allow Nexl to access your tenant data by means of the Microsoft 365 Management APIs. The consent process requires the tenant admin to sign in to the Microsoft Entra ID consent UI and grant the access permissions Nexl is requesting.

Once set up, Nexl continues to request additional access tokens on an ongoing basis, without the need for further tenant admin interaction. The access tokens are then passed to the Microsoft 365 Management APIs to authenticate and authorise Nexl. The following diagram shows the sequence of consent and access token requests.



Permissions

For Nexl to access data in the Microsoft Graph API, the user or administrator must grant it the correct permissions via the consent process. This table lists the permissions associated with Nexl's Microsoft 365 integration.

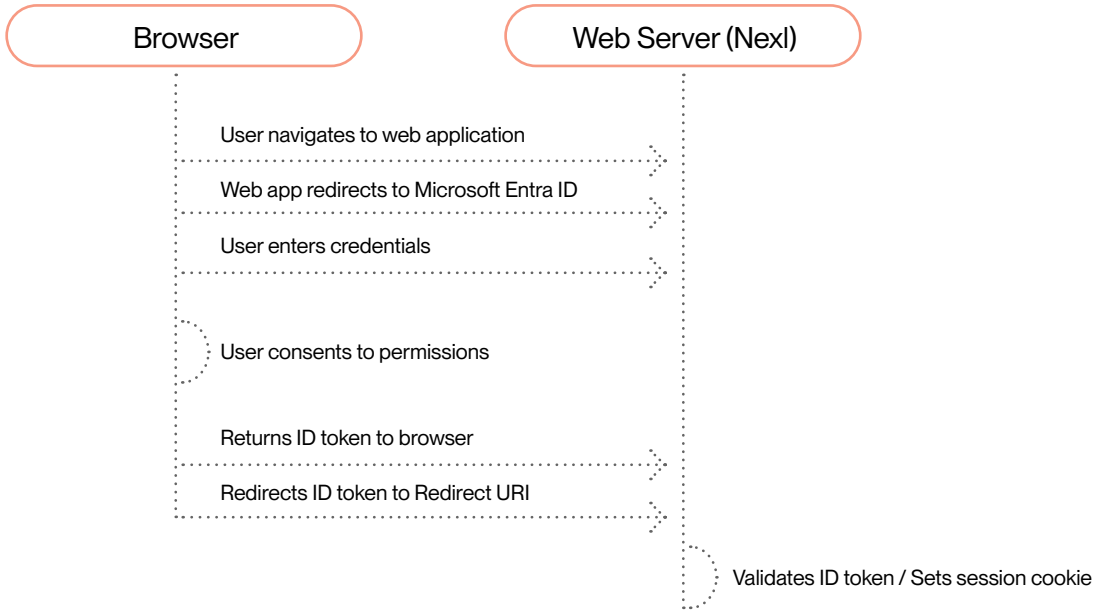
Permission	Display String	Description	Type	Admin Consent Required
Calendars.Read	Read calendars in all mailboxes	Allows Nexl to read events of all calendars without a signed-in user. Required for real-time syncing.	Application	Yes
email	View users' email address	Allows Nexl to read your users' primary email address. Required for real-time syncing.	Delegated	No
Mail.Read	Read mail in all mailboxes	Allows Nexl to read mail in all mailboxes without a signed-in user. Only used to create the Change Notification subscription. Nexl does not access or process email body or attachments.	Application	Yes
Mail.ReadBasic	Read user basic mail	Allows Nexl to read email in the signed-in user's mailbox, except body, bodyPreview, uniqueBody, attachments, extensions, and any extended properties.	Delegated	No
Mail.ReadBasic.All	Read all users basic mail	Allows Nexl to read all users' mailboxes except Body, BodyPreview, UniqueBody, Attachments, ExtendedProperties, and Extensions.	Application	Yes
offline_access	Access user's data anytime	Allows Nexl to read and update user data even when they are not currently using the app.	Delegated	No
openid	Sign in users	Allows Nexl to receive a unique identifier for the user. Used for authentication via Microsoft Entra ID.	Delegated	No
profile	View users basic profile	Allows Nexl to see your users' basic profile (name, picture, user name).	Delegated	No

User Authentication

When a user logs into Nexl, they get redirected to a Microsoft Entra ID login page. The user then enters their username and password, and after a successful authentication, they will be redirected back to Nexl. The diagram below provides a high-level overview of the sign-in authentication flow.

Microsoft Identity Platform

https://login.microsoftonline.com/common

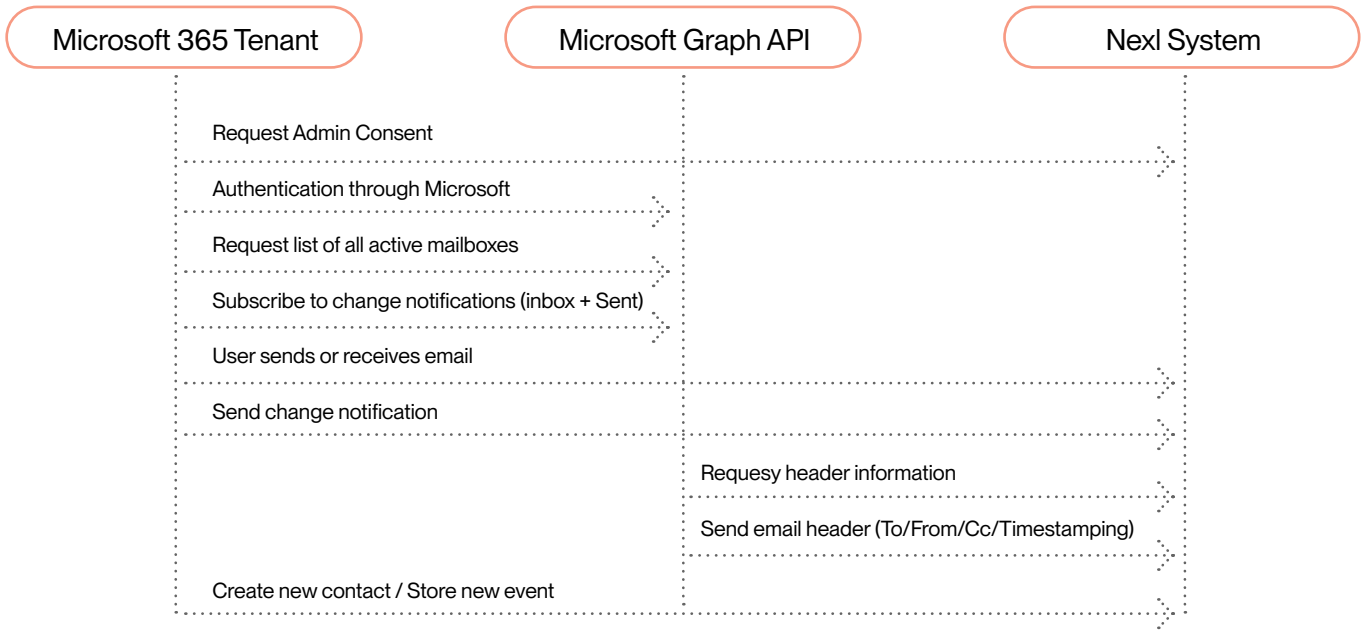


Change Notifications

Once permission to your Microsoft 365 tenant has been granted, Nexl retrieves a list of users and active mailboxes. You can then select the active mailboxes for which you want Nexl to subscribe to change notifications. (You also have the option to select all active mailboxes.) Nexl is only able to track relationship data from the selected mailboxes. Once a mailbox has been selected, Nexl uses the Microsoft Graph API to subscribe to change notifications on the mailbox's Inbox and Sent Items folders. This allows Nexl to capture relationship information, as well as sent and received email items.

When there's a change to the subscribed mailbox folder (e.g., a new email is received), a notification is sent to Nexl's system which includes the email's unique identifier. Nexl then requests the email header with the matching ID and creates a new event. Each event includes the date, the To, From and Cc email addresses, and the email's public email ID, internal email ID, and conversation ID. The diagram below provides an overview of the change notification process.

Change Notification Flow



Information Security

By selecting our platform, you are choosing a cloud platform that is hosted on a fully audited and accredited cloud infrastructure to meet information security standards, including SOC 2 and ISO 27001, which ensures the controls and processes are in place to protect your data. We have robust security measures including disaster recovery, data backup, and a fully redundant infrastructure to guarantee uptime.

Infrastructure Security

- Hosted on AWS & Azure
- Network & Perimeter Protection
- Regional servers (EU, US, AUS)

Customer Data Protection

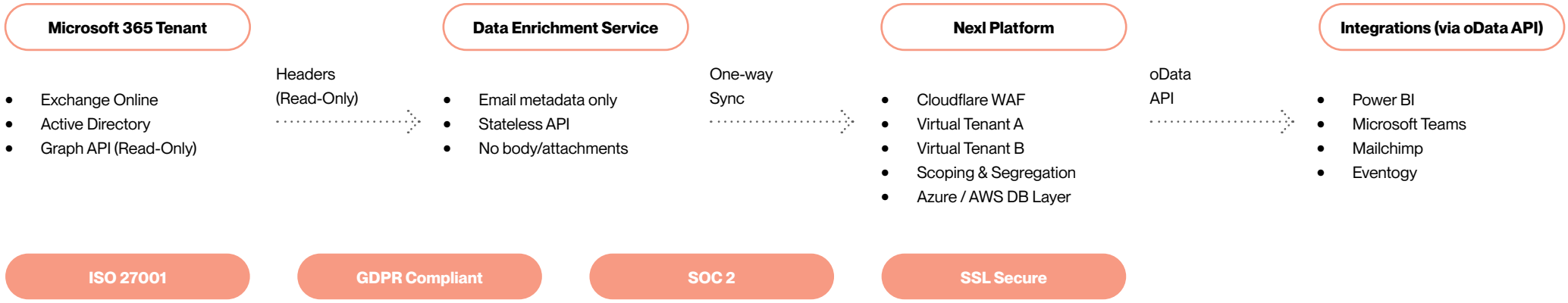
- Logical Tenant Separation (Private Cloud Available)
- Encryption In Transit (TLS 1.2, TLS 1.3)
- Encryption At Rest (AES-256)

Application Protection

- Web Application Firewall (WAF)
- DDoS Protections
- Regular Penetration Testing & Vulnerability Scanning

Operations & Awareness

- 24/7 Monitoring & Incident Response
- Security Education & Awareness Training



ISO 27001 · GDPR Compliant · SOC 2 · SSL Secure

Information Security - Details

For more details regarding Nexl's information security, as well as links to our Privacy Policy and Data Processing Agreement, please refer to the table below.

Information Security	Details
Main Data Storage	AWS (EU, Australia), Azure (US), Digital Ocean (Canada)
Available Server Locations	EU, Australia, USA, Canada
Encryption	DB and File encryption enabled (transit and rest). All traffic through HTTPS only.
Security	24/7 Security monitoring and threat detection through Cloudflare and Rollbar
Email Notification Delivery	SendGrid
Data Backups	Daily backups are retained for 7 days. Weekly backups are retained for 4 weeks.
Data Accessibility	Data can be accessed 30 days after termination with possible extension up to 90 days. Alternatively, Nexl can provide an extract of customer data.
Planned Downtime	All customers will be informed at least 2 weeks before a planned downtime.
Privacy Policy	https://nexl.cloud/privacy-policy/
Data Processing Agreement	https://nexl.cloud/data-processing-agreement/

Setup Guide

Nexl is a purely web-based system. Setting up Nexl is quick and easy, and we will be there to guide you along the way. Please see below for system requirements and a step-by-step guide to implementation.

System Requirements

Before you begin your integration, please review the following system requirements and confirm that all requirements are met:

- Internet access
- Recent version of Google Chrome, Firefox, Safari, or Edge (IE11 is not officially supported)
- Office 2013 or newer (for Outlook Add-in only)
- Exchange On-Premise or Microsoft 365 Exchange Online

Implementation

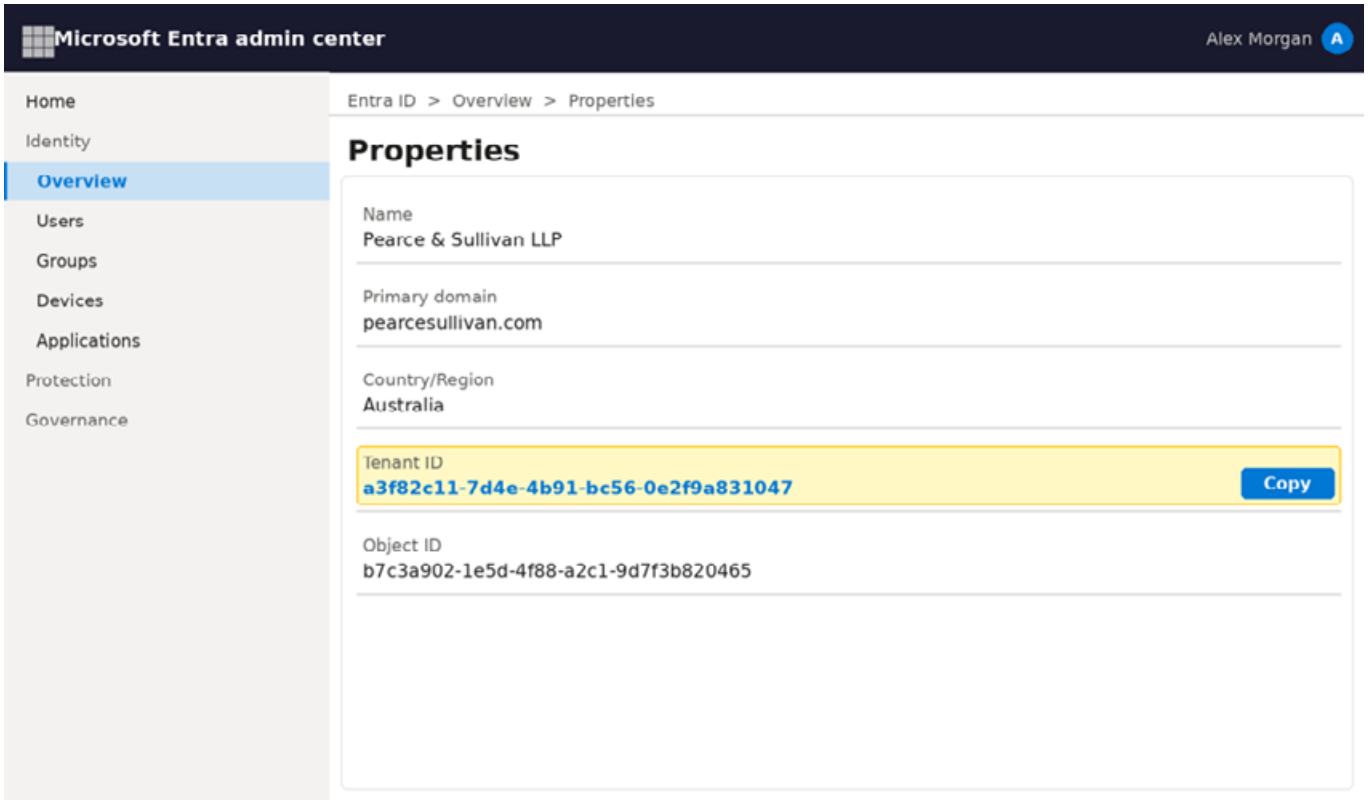
Step 1: Locate your Microsoft 365 Tenant ID

> Updated: The portal has changed. Azure Active Directory is now Microsoft Entra ID. Use the steps below which reflect the current (2025/2026) portal.

Setup Guide

Option A — Via the Microsoft Entra admin center (recommended):

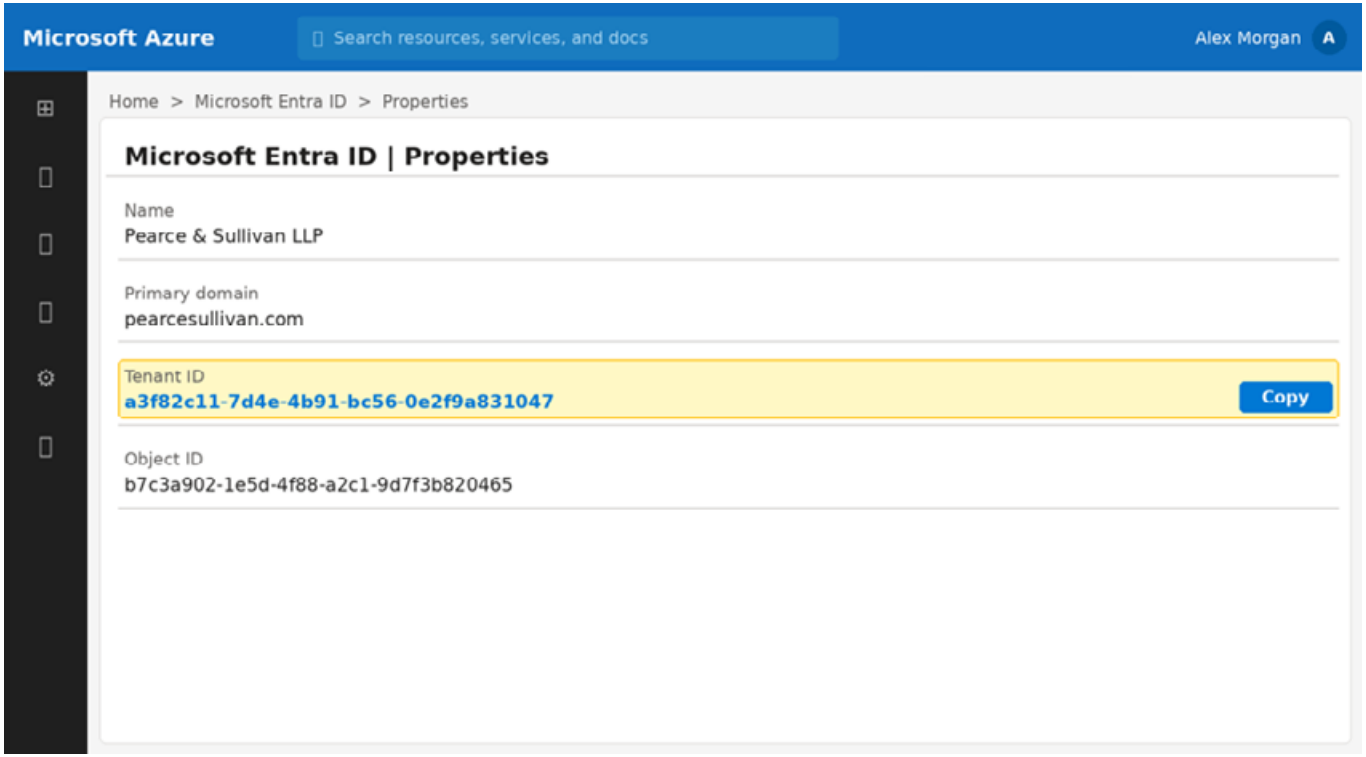
1. Navigate to https://entra.microsoft.com and sign in with your Global Administrator credentials.
2. In the left-hand menu, browse to Entra ID > Overview > Properties.
3. Scroll down to the Tenant ID section and copy your Tenant ID.



Setup Guide

Option B — Via the Azure portal:

1. Navigate to https://portal.azure.com and sign in.
2. Search for “Microsoft Entra ID” in the top search bar and select it.
3. Select Properties from the left-hand menu.
4. Scroll down to find your Tenant ID.



Setup Guide

Step 2: Share your Tenant ID and Admin User email with Nexl

Send an email to Nexl's Client Services team with the following information:

1. Your Microsoft 365 Tenant ID
2. The email address of the Admin user who will be providing consent to the Microsoft 365 permissions.

The Nexl team will then create your Tenant on the Nexl system, and will notify you by email when this step is complete.

Step 3: Provide consent to Microsoft 365 permissions

1. Navigate to your Nexl login page, using the URL corresponding to your server location:

- Australia - https://au.nexl.cloud
- EU - https://eu.nexl.cloud
- USA - https://us.nexl.cloud

Note: If you are a Private Cloud client, or if you are unsure which server region your account is hosted in, please contact the Nexl Client Services team.

1. Log in using the 'Microsoft 365' option (ideally with the Admin user account for your Microsoft 365).
2. Agree to allow users to log in to Nexl with Microsoft 365.
3. Once logged in, click the 'Admin Connect' button on top of the page.
4. Grant access to the Nexl application.

Step 4: Notify the Nexl team that consent has been granted

Notify the Nexl team that consent has been granted. Once notified, we will begin monitoring our system to ensure the connection is working properly. After we've confirmed that user activity is being captured, we will begin any retrospective data imports you have purchased.

Outlook Add-In Setup

Nexl's Outlook Add-In can be installed one of two ways: (1) on an individual user basis (one by one), or (2) on a firm-wide basis. See below for a step-by-step guide to each implementation option.

Individual User Basis

1. Open a web browser and navigate to the manifest URL for your server location:

- Australia - https://au.nexl.cloud/outlook/manifest.xml
- EU - https://eu.nexl.cloud/outlook/manifest.xml
- USA - https://us.nexl.cloud/outlook/manifest.xml

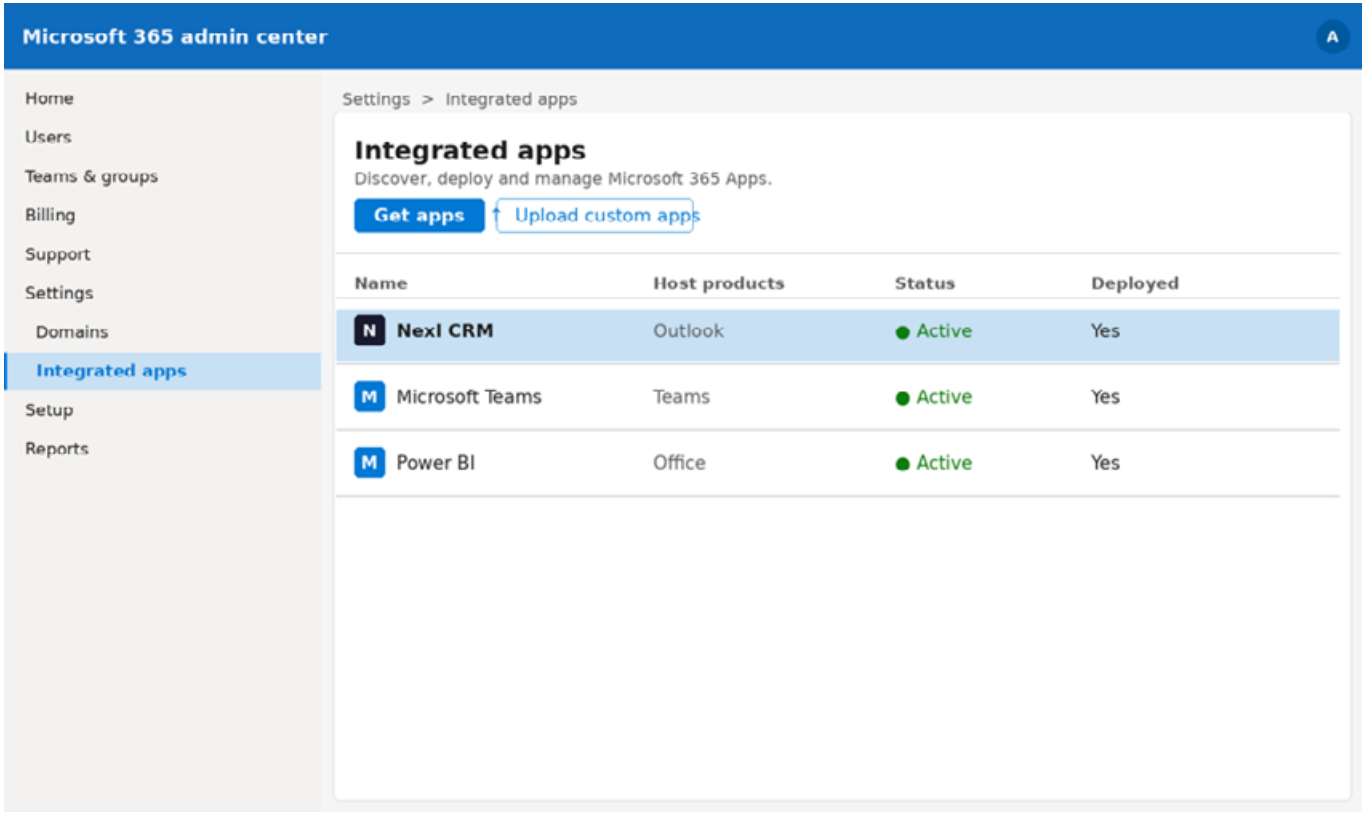
Note: If you are a Private Cloud client, or if you are unsure which server region your account is hosted in, please contact the Nexl Client Services team. In the event that you require the manifest file this will be generated and provided by your Client Success Manager

2. From the top menu of your browser, click File, then select the relevant option to save the page as a file (e.g. 'Save As', 'Save Page As', etc.)
3. Open the Outlook desktop application.
4. Click the 'Get Add-ins' button. This may be displayed in your top ribbon, or in the three-dots dropdown menu.
5. From the Add-Ins menu, click 'My add-ins.'
6. At the bottom of 'My add-ins,' select the '+ Add a custom add-in' dropdown.
7. Select 'Add from file' from the dropdown menu.
8. Select the manifest file you have downloaded, then click 'Open.' (Alternatively, confirm with your Implementation Manager to provide the correct Manifest file for upload.)
9. Click the 'Install' button.
10. Close the Add-in menu. You will now see Nexl in your Outlook ribbon.
11. Click the Nexl Add-in to open it, and use the Pin button to pin it to your dashboard.

Outlook Add-In Setup — Firm-Wide Deployment

Follow the steps below to use the Microsoft 365 admin center to remotely deploy Nexl's Outlook Add-in to all your users.

1. Go to the Microsoft 365 admin center: https://admin.microsoft.com/Adminportal/Home/#/homepage
2. Open the 'Settings' dropdown, then select 'Integrated apps.'
3. Select 'Upload custom apps.'



Outlook Add-In Setup — Firm-Wide Deployment

4. In the ‘Upload Apps to deploy’ window, select ‘Provide link to manifest file’ or upload via manifest file. You can download the manifest file for your location using the links in the table below.
5. Enter the URL corresponding to your server location, then click ‘Validate.’

- Australia - https://au.nexl.cloud/outlook/manifest.xml
- EU - https://eu.nexl.cloud/outlook/manifest.xml
- USA - https://us.nexl.cloud/outlook/manifest.xml

If your location is not listed above, please confirm with your implementation manager which is the correct link to use.

6. Once the manifest file has been validated, click ‘Next.’
7. Under ‘Assign users,’ select whether to deploy the add-in to ‘Just me,’ ‘Entire organisation,’ or ‘Specific users/groups.’ We recommend deploying to a smaller group for testing prior to firm-wide rollout (e.g. your BD/Marketing team or early adopters).
8. From the ‘Accept permissions requests’ page, click ‘Next.’
9. From the ‘Review and finish deployment’ page, click ‘Finish deployment.’

Note: It may take up to 24 hours for the add-in to become visible to the selected users.

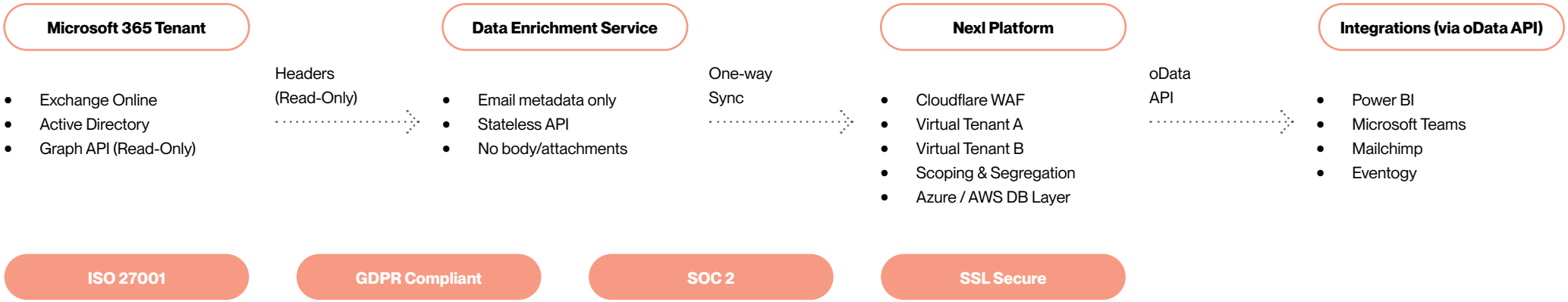


Training

All of Nexl's training sessions will be held virtually in a webinar-style event for all participating users. Our training sessions focus heavily on specific BD and Marketing strategies to help your lawyers improve their business development efforts. Upon request, sessions can be recorded and made available to you.

For a high-level overview of our training and implementation process, please see the diagram below.

Updated: This is a high-level overview of a FastTracked Implementation. Your implementation timeline will be tailored in accordance with your signed Statement of Work.



Additional Resources

Resources
In addition to our live training events, we also offer a number of 24/7 resources to help you learn and troubleshoot.

Training Videos
We offer a number of self-paced video courses for both beginners and admin users. You can access our training videos at https://learn.nexl.cloud.

Live Chat Support
We offer in-app chat support to answer your questions in real time. You can find our chat support on any page or section within Nexl, in the bottom right corner.

Help Center
Nexl's Help Center is a collection of articles and how-tos that you can easily browse or search. You can access Nexl's Help Center at https://help.nexl.cloud, as well as via our in-app chat support widget.

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Nexl is a leading provider of innovative legal technology solutions aimed at creating efficiencies, accelerating growth and providing data-driven insights that drive smart decision making. We offer scalable solutions for law firms of all shapes and sizes Founded by legal professionals with vast experience working within legal firms, Nexl grew out of a desire to fundamentally change the way that legal firms grow and engage with internal and external stakeholders. The existing way of managing these relationships doesn't work. Today, we're driving the delivery of smart, innovative and technology-driven services to clients worldwide. Smart, insight-driven solutions underpin Nexl's purpose. Drawing from our own practical experience working within the professional services industry, our purpose is to develop and deliver technology solutions that will drive positive change in how law firms manage their client relationships and grow their practice.

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