Setting up e-mail (OAUTH) in Microsoft Entra/Microsoft Azure

Introduction

This document briefly describes a general example of activating <u>client secret authentication</u> in Microsoft Entra/Microsoft Azure to use with e-mail in Exchange/Office365.

The document also describes how to test settings from Microsoft Entra/Microsoft Azure in the Monitor ERP client with the <u>client secret method</u>.

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Microsoft Entra/Microsoft Azure

- An account to Microsoft Entra/Microsoft Azure is required.
- To test e-mail, the required credentials must be added under "Users" in the Microsoft Entra/Microsoft Azure portal.

Limitations

- <u>Only one</u> authentication method can be active at a time.
- The setting for "Supported account type" may differ depending on company setup this guide describes a setup with the "single tenant" account type.

Please note: Further configuration and customization of settings according to each environment is required to complete the setup. Also note that this document **does not cover** the security aspect of setting up e-mail using these settings in a tenant.

Security considerations

The document **does not cover settings or configurations for security**; it covers settings used to test that a configuration for the authentication method work in the Monitor ERP client on a basic level. Please note: **It is up to each IT department to select and configure appropriate security settings** in their respective environments.

Example: You may want to complement with suitable security settings if you configure a tenant with the <u>Client secret authentication method</u> according to guidelines from Microsoft:

https://learn.microsoft.com/en-us/powershell/module/exchange/newapplicationaccesspolicy?view=exchange-ps



Client secret authentication

Microsoft Azure setup

Please note: Microsoft currently provides two administrative portals:

- portal.azure.com
- entra.microsoft.com

The guide below describes the setup process in Microsoft Azure.

1. Sign in with an existing account at <u>https://portal.azure.com</u>.

Microsoft				
Sign in to continue to Microso	ft Azure			
Email address, phone number or Skype				
No account? Create one!				
Can't access your acco	unt?			

2. Once signed in, search for and access "Azure AD B2C".

	Azure A
Welcome to Az Don't have a subscription Services (a) Services Resources Narketplace (3) Don't have a subscription Services Services	elcome to Azi t have a subscriptio t have a subscriptio encode en



3. Click on "App registrations".

Home > Azure AD B2C >>	
₽ Search «	Troubleshoot R Got feedback?
1 Overview	✓ Essentials
Manage	This is not an Azure AD B2C directory. To create a n
Company branding User attributes Users Roles and administrators Policies	Learn more about Azure AD B2C Use Azure AD B2C as your customer identity and access management solution today! Get started c ^a

4. Click on "New registration".



5. Enter a name and select your preferred account type (set to single tenant by default).





6. Enter the appropriate "Redirect URI" – for example, select "Public client/native (mobile & desktop)" and at the URL <u>https://login.microsoftonline.com/common/oauth2/nativeclient</u>.

Refer to - https://learn.microsoft.com/en-us/azure/active-directory/develop/reply-url.



7. Click on the "Register" button.

Home > Azure AD B2C App registrations >
Register an application
···· ··········· ·····················
^ Name
The user-facing display name for this application (this can be changed later).
Monitor G5 🗸
Supported account types
Who can use this application or access this API?
 Accounts in this organizational directory only (only - Single tenant)
 Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)
Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
O Personal Microsoft accounts only
Help me choose
Redirect URI (optional)
We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be
changed later, but a value is required for most authentication scenarios.
Public client/native (mobile V) https://login.microsoftonline.com/common/oauth2/nativeclient V
Register an app you're working on here. Integrate gallery apps and other apps from outside your organization by adding from Enterprise applications
By proceeding, you agree to the Microsoft Platform Policies 🗗
Register
(CG)(A)(C)



8. You will be forwarded to the menu of the application you just registered, if not – click on the application.

Home > Azure AD B2C App registration	15 >	
賎 Monitor G5 🖉 …		
₽ Search «	📋 Delete 🌐 Endpoints 🔄 Preview features	
Overview	A Ferentiale	
🗳 Quickstart	 Essentials 	
💉 Integration assistant	Display name Monitor G5	Client credentials Add a certificate or secret
Manage	Application (client) ID	Redirect URIs <u>0 web. 0 spa. 1 public client</u>
Branding & properties	Object ID	Application ID URI
Authentication	Directory (tenant) ID	Add an Application ID UKI Managed application in local directory
📍 Certificates & secrets		Monitor G5
Token configuration	Supported account types My organization only	
API permissions		U
Expose an API	Starting June 30th, 2020 we will no longer add any new features to Azur to provide technical support and security updates but we will no longer	re Active Directory Authentication Library (ADAL) and Azure AD Graph. We will continue r provide feature updates. Applications will need to be upgraded to Microsoft
App roles	Authentication Library (MSAL) and Microsoft Graph. Learn more	
A Owners	Get Started Documentation	
& Roles and administrators		
Manifest	Build your application wit	h the Microsoft identity platform
Support + Troubleshooting	Build your application with	in the microsoft identity platform
Troubleshooting	The Microsoft identity platform is an auth- management tools. You can create modern, stan	entication service, open-source libraries, and application idards-based authentication solutions, access and protect APIs,
New support request	and add sign-in for you	r users and customers. Learn more 다

9. Copy the values of the <u>Application (client) ID</u> and <u>Directory (tenant) ID</u> and save them, you will need them later.

9 Search	Celete Delete Endpoints R Preview features			
Overview	▲ Eccantials			
Quickstart	Picela and	Without and dentified		
Integration assistant	Monitor G5	Add a certificate or secret		
anage	Application (client) ID	Redirect URIS 0 web, 0 spa, 1 public client		
Branding & properties	Object ID	Application ID URI		
Authentication	Directory (tenant) (D	Add an Application ID URI		
Certificates & secrets	2 (Reading) to	Monitor G5		
Token configuration	Supported account types My organization only			
API permissions				
Expose an API	Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure AD Graph. We will contin to provide technical support and security undates but we will no longer provide feature undates. Applications will need to be upgraded to Microsoft			
App roles	Authentication Library (MSAL) and Microsoft Graph. Le	amimore		
Owners	6.6			
Roles and administrators	Get Started Documentation			
Manifest	Puild your annling	ian with the Minnersta identity platforms		
oport + Troubleshooting	Build your applicat	ion with the Microsoft identity platform		
Traublachaoting	The Microsoft identity plat	form is an authentication service, open-source libraries, and application		
reconsciound	management tools. You can create modern, standards-based authentication solutions, access and protect APIs,			



10. Click on "Manifest" in the left-hand menu.



11. We need to add the authentication method to our manifest, this can be done by copying and pasting the code found under the section "Configure for app-only authentication" in the documentation from Microsoft.

Refer to – <u>https://learn.microsoft.com/en-us/exchange/client-developer/exchange-web-</u> <u>services/how-to-authenticate-an-ews-application-by-using-oauth#configure-for-app-only-</u> <u>authentication</u>

For example, copy and add the <u>app-only authentication code</u> to the "Manifest" then save.





12. Save the "Manifest" settings.



13. Click on "API permissions" in the left-hand menu.

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Overview		🔒 Su	ccessfully upd
4 Quickstart		-	
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Certificates & secrets		22	"keyCre
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Token configuration		24	"logoUr
- A DI permissions		25	"logout
API permissions		26	"name":
Expose an API		27	"notes"
		28	"oauth2
App roles		29	"oauth2
		30	"oauth2
Owners		31	"oauth2
Roles and administrators		32	"option
		33	"orgRes
10 Manifest		34	"parent
		25	"



14. Confirm that the permissions have been added (full_access_as_app, Type: Application).

Home > Monitor GS 	permissions 🖉 …						
₽ Search	« 🜔 Refresh 🔗 Got feed	iback?					
Overview							
 Quickstart Integration assistant 	1 The "Admin consent requi	ired" column shows th	te default value for an organization. However, user consent can be	customized per permission,	user, or app. This co		
Manage	Configured permissions						
Branding & properties	Applications are authorized to all the permissions the applicat	Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permission all the permissions the application needs. Learn more about permissions and consent					
Authentication Certificates & secrets	+ Add a permission 🗸 0	+ Add a permission 🗸 Grant admin consent for					
Token configuration	API / Permissions name	Туре	Description	Admin consent requ	Status		
 API permissions 	✓ Microsoft Graph (1)						
 Expose an API 	User.Read	Delegated	Sign in and read user profile	No	Granted for		
🔢 App roles	✓Office 365 Exchange Online ((1)					
A Owners	full_access_as_app	Application	Use Exchange Web Services with full access to all mailboxes	Yes	Not granted f		

15. Grant admin consent.

Monitor ERP requires full access to
Exchange Web Services, additional
security settings can be applied to
adapt the level of security.

Home > Monitor G5	ermissions 🖉 …				
₽ Search «	🕐 Refresh 🕴 🗖 Got feedba	ck?			
Cverview	Grant admin consent co	nfirmation.			
n Quickstart	Do you want to grant consent fo	or the requested	I permissions for all accounts in ? This will update a	ny existing admin conse	ant records
💉 Integration assistant	Ves 2 No				
Manage	Connigure				
📑 Branding & properties	Applications are authorized to call all the permissions the application	APIs when they a needs. Learn mo	are granted permissions by users/admins as part of the conser re about permissions and consent	t process. The list of conf	igured perm
Authentication					
? Certificates & secrets	+ Add a permission 🗸 Gran	t admin consent	for =		
Token configuration	API / Permissions name	Type	Description	Admin consent requ	Status
 API permissions 	Microsoft Graph (1)				
 Expose an API 	User.Read	Delegated	Sign in and read user profile	No	🥑 Grante
App roles	✓ Office 365 Exchange Online (1)				
A Owners	full_access_as_app	Application	Use Exchange Web Services with full access to all mailboxes	Yes	🔺 Not gr

16. Verify that the icon is green.



Configured permissions				
Applications are authorized to call all the permissions the application	APIs when they a needs. Learn mo	are granted permissions by users/admins as part of the conser re about permissions and consent	t process. The list of con	figured permission
+ Add a permission 🗸 Gran	t admin consent	for		
API / Permissions name	Туре	Description	Admin consent requ	Status
∽Microsoft Graph (1)				
User.Read	Delegated	Sign in and read user profile	No	🥝 Granted for v
∽ Office 365 Exchange Online (1)				
full_access_as_app	Application	Use Exchange Web Services with full access to all mailboxes	Yes	🕑 Granted for v

17. Click on "Authentication" in the left-hand menu.



18. Under "Advanced settings", set "Enable the following mobile and desktop flows" to "No".

Home > Azure AD B2C App regis	trations > Monitor G5	
<mark>∋ Monitor G5</mark> Au	thentication 🖈 …	
Search Integration assistant	 Got feedback? editor. Learn more about these restrictions. 	
Manage	Advanced settings	
Branding & properties	Advanced settings	
Authentication	Allow public client flows ①	
Certificates & secrets	Enable the following mobile and desktop flows: Yes	No
Token configuration	App collects plaintext password (Resource Owner Password Credential Flow) Learn more	
 API permissions 	 No keyboard (Device Code Flow) Learn more 2ⁿ SSO for domain-joined Windows (Windows Integrated Auth Flow) Learn more 2ⁿ 	
Expose an API	App instance property lock \odot	
🛓 App roles	Configure the application instance modification lock Learn more r	Configure
Owners		igure
Roles and administrators		
0 Manifest	Save Discard	



19. Save the settings.

₽ Search	« 🔗 Got feedback?
🚀 Integration assistant	 editor. Learn more about these restrictions.
Manage	
Branding & properties	Advanced settings
Authentication	Allow public client flows ①
Certificates & secrets	Enable the following mobile and desktop flows: Yes No
Token configuration	 App collects plaintext password (Resource Owner Password Credential Flow) Learn more
 API permissions 	 No keyboard (Device Code Flow) Learn morer² SSO for domain-joined Windows (Windows Integrated Auth Flow) Learn morer³
Expose an API	App instance property lock ${}^{}$
App roles	Configure the application instance modification lock. Learn more ratio
Owners	
Roles and administrators	
Manifest	Save Discard

20. Access "Certificates & secrets" in the left-hand menu and click on "New client secret".



21. Enter a name and set a preferred client secret expiration, then click "Add".

Home > Azure AD 82C App registrations > Monitor G5	Add a client secret		×
1	Description	ClientSecretTest	
R Got feedback?	Expires	Recommended: 6 months 2	~
Credentials enable confidential applications to identify themselves to the authentication service when rec scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a	eiv 3 Add Cancel		
Application registration certificates, secrets and federated credentials can be found in the tabs below.			
Certificates (0) Client secrets (0) Federated credentials (0)			
A secret string that the application uses to prove its identity when requesting a token. Also can be refer	ec		



22. Note that **the client secret can only be copied once** – copy the content in "Value" and store it in a safe place, you will need it later.

Microsoft Azure				P Search resources, services, and docs (S+/)	
Home > Azure AD 82C App regist	tificates & secrets ≉ …				
P Search	< P Got feedback?				
Overview Quickstart	Got a second to give us some feet	fback? →			×
 integration assistant Manage 	Credentials enable confidential applica scheme). For a higher level of assurance	tions to identify themselves to e, we recommend using a cert	the authentication service when re- tificate (instead of a client secret) as	velving tokens at a web addressable location (using an HTT a credential,	195
 Branding & properties Authentication 	Application registration certificates	s, secrets and federated credent	als can be found in the tabs below.		×
Certificates & secrets Token configuration	Certificates (0) Client secrets (1) Federated credentials (0)		
API permissions Expose an API	A secret string that the application us	es to prove its identity when r	equesting a token. Also can be refer	red to as application password.	
App roles App roles Owners	+ New client secret Description	Expires	Value 🕥	Secret ID	
Roles and administrators Manifest	ClientSecretTerri	4/25/2023	PdYBQ-n3x-cad9P-W1Deh2Dk	0 b56227#0-d85f-4526-9d37	08

23. Go to "Users", copy an existing e-mail address, then test it in the Monitor ERP client according to the next part.

P Users 1		
All Services (17)	Resources	Resource Groups
Azure Active Directory (0)		
Services		
🚨 Users 🙎		
Q Users		



Monitor ERP setup (Client secret method)

1. Start the Monitor ERP client and sign in with the appropriate admin account.

Monitor ERP	×
趙 004.1 Demo3 マ ADMIN	

2. Access the "System settings" procedure.



3. Click on the "System overall" tab.

6	, P == 🔡 ≕ 💷 ★ - 😧	System settin	gs
Manut	facturing Purchase Sales Stock Time recording Accounting	System overall	۷
Genera	st		
1.	Date format Date	▼ ≫	
2.	Use alias when exporting to Business intelligence No 🔻 >		
3.	Manage staggered discount rates in the procedure Discount categories Yes 🔹 🔊		



4. In "E-mail method" select "Server based, via Microsoft Exchange Online".



5. Set the server address - outlook.office365.com.



6. Paste the <u>Application (client) ID</u> previously saved from Microsoft Azure in the corresponding field.

	🗄 🔎 📰 🏥 🏥 ★ 🕜	System settings
Manu	facturing Purchase Sales Stock Tim	e recording Accounting System overall Mobile client Agent
E-mail		
13.	E-mail method	Server based, via Microsoft Exchange Online 🔹 🔊
14.	Server address (Exchange/SMTP)	outlook.office365.com
15.	Port (Exchange/SMTP)	0
16.	User name (SMTP)	>>
17.	Password (SMTP)	>>
18.	Use SSL	No 🔻 ≫
19.	Maximum size for files in e-mail	10 🗘 MB ≫
Micros	oft Entra ID (Azure Exchange/SharePoint)	
20.	Application (client) ID	***************************************
21.	Directory (tenant) ID	0 »
22.	Authentication flow	User name/Password 🔹 🍽
23.	Client secret	>



7. Paste the <u>Directory (tenant) ID</u> previously saved from Microsoft Azure in the corresponding field.

\bigcirc		Custom cottings
		System settings
Manu	facturing Purchase Sales Stock Time reco	rding Accounting System overall Mobile client Agent
E-mai		
13.	E-mail method	Server based, via Microsoft Exchange Online 🔻 🔊
14.	Server address (Exchange/SMTP)	outlook.office365.com
15.	Port (Exchange/SMTP)	0 >>
16.	User name (SMTP)	>>
17.	Password (SMTP)	>>
18.	Use SSL	No 🔻 ≫
19.	Maximum size for files in e-mail	10 ‡ MB >>>
Micros	oft Entra ID (Azure Exchange/SharePoint)	
20.	Application (client) ID	*******
21.	Directory (tenant) ID	• ·····
22.	Authentication flow	User name/Password 🔻 🍽
23.	Client secret	>

8. In "Authentication flow" select "Client secret".



9. Paste the <u>Client secret</u> previously saved from Microsoft Azure in the corresponding field.





10. The port can be set, for more information refer to <u>https://learn.microsoft.com/en-us/microsoft-365/enterprise/urls-and-ip-address-ranges?view=o365-worldwide</u>.

				System settir	ngs
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E-mai	I				
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14.	Server address (Exchange/SMTP)	outloo	k.office365.com	O »	
15.	Port (Exchange/SMTP)		443 >>		
16.	User name (SMTP)			>>	
17.	Password (SMTP)			>>	
18.	Use SSL	No	▼ ≫		
19.	Maximum size for files in e-mail	10	MB >>>		

11. Click on the green icon next to the server address to test the settings.



12. Set e-mail method to "Server based, via Microsoft Exchange Online".

: 9	Check e-mail se	ettings
*	E-mail method Server based	, via Microsoft Exc 🗙 🔻
_	Recipient	
-	Sender	
_	User name (Exchange)	
-	Password (Exchange)	*******
	Result	
;		*
		Ψ.
	Test C	ancel



13. Enter a valid recipient, sender, user name and password.

ç	Che	eck e-mail settings
-	E-mail method	Server based, via Microsoft Exc 🗙 🔻
	Recipient	
-	Sender	
	User name (Exchange)	
-	Password (Exchange)	*****
	Result	
1		÷
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	_	
L	Test Cancel	

14. Press the "Test" button – the message "OK" will be displayed if everything is set up according to the examples in this document.

g	Check e-mail settings								
-	E-mail method	Server based, via Microsoft Exc 🗙 🔻							
_	Recipient								
_	Sender								
_	User name (Exchange)								
-	Password (Exchange)	*************							
l	Result								
:	OK!	*							
		*							
	Т	est Cancel							

(Please note: If the service has been set up recently you may receive a **403 Forbidden message** due to delays when updating a tenant in Microsoft Azure portal. In this case, wait a moment then press "Test" again. If you encounter other messages in the "Result" box, please refer to the online documentation by Microsoft).



Settings for incoming e-mail (Client secret method)

1. Access the "Settings for incoming e-mail" procedure.

		Den
😑 🕒 🤤 🖻 📀 🔕		
	 Basic settings Company information System settings Calendars 	File management Paths File path list Settings for file viewer
	Multi-company settings Edit bulletin board Desktop templates Server printers Form templates	 Export/Import Settings for export/import Settings for BI Settings for incoming e-mail Balance import

2. Under "Service" select "Exchange Online".

	Ⅲ★- 0	Settings for incoming e-mail	- 🗆 🗙
Server settings			
Service Server	name	Port Polling interval	
Exchange		0 min	
Exchange	Directory (tenant) ID Authentication flow	Client secret	
IMAP	User name/Password		
Exchange Online			
+≣ Val. E-mail	User name	Password Type	Available
•			



3. Enter the URL to the server - for example outlook.office365.com.

	P = 1	■ ः 💷 ★、 🕢		Settings for inc	coming e-mail			_ □
Serv	ver settings							
Servio	ce	Server name		Port	Polling interval			
Exch	ange Online 🔻	outlook.office365.com		0	min			
Applic	ation (dient) ID	Directory (tenant) ID	Authentication flow	Client secret				
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	1							

4. Set a pooling interval (in minutes) according to your requirements, in our example we set this to 60,00 to check for new e-mails on the server once every hour.

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Server settings		Port Polling interva	I	
Exchange Online		0 60,00 min]	
Application (dient) ID Directory (tenant) ID	Authentication flow Cl User name/Password V	ent secret		
E-mai accounts				
+≣ Val. E-mail	User name	Password	Type Available	
-=				
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				 Applica Application (client) ID is missing Directo Directory (tenant) ID is missing



5. Enter the <u>Application (client) ID.</u>

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E-r	naii - III	accounts /al. E-mail		Liser name	Password	Type	Available		
C	5								
								9 1 errors	~
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6. Enter the <u>Directory (tenant) ID.</u>

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ver settings						
ice	Server name		Port Polling interval			
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ication (client) ID	Directory (tenant) ID	Authentication flow	Client secret			
		Call Humen Cashord				
nail accounts						
Val. E-mail	U	ser name	Password	Type Avail	able	



7. "Authentication flow" should be set to "Client secret".

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Server	r settings								
Service		Server name			Port Pol	ing interval			
Exchang	ge Online 🔹 🔻	outlook.office365.com			0	60,00 min			
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******	*****************	******	·************	ilient secret	0				
			1	User name/Password					
E-mail	accounts			Client secret	L				
+≣ ∐	Val. E-mail		User name		Password	Type	Available		_
-=									
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								Client Client secret is missing	

8. Enter the <u>client secret.</u>

		. 4	u 🛧 - 😯			Settings for inco	ming e-mai	I		- 🗆 🗙
Serv	ver settings									
Servi	ice	Server n	ame			Port	Polling interval			
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Applic	cation (client) ID		Directory (tenant) ID		Authentication flow	Client secret				
	******	******		******	Client secret	•	•••••			
E-m	ail accounts									
+=	Val. E-mail			User name		Password		Туре	Available	
0										



9. Add an e-mail account by pressing the plus icon or F5 on your keyboard.

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Server settings										
Service	Server n	ame				Port Pollin	ng interval			
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Application (client) ID		Directory (tenant) ID		Authentication flow	C	lient secret				
****************	********	*************	***********	Client secret		**************	*****			
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E-mail accounts						D		T		
			User name			Password		Type	Available	
Add new row at the end (F5)									
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10. Enter the e-mail address.

● ● ■ ■ = ■ ★ • ●	Setting	s for incoming e-mai	I	-	
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Service Server name		Port Polling interval			
Exchange Online v outlook.office365.com		0 60,00 min			
Application (client) ID Directory (tenant) ID	Authentication flow Clie	ent secret			
***********************	Client secret 🔹 💌	******************			
E-mail accounts		I- •	L		
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11. Select all "Types" that apply to your configuration of Monitor ERP, for example "Monitor-to-Monitor".

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Server settings				
Service Server name		Port Polling interval		
Exchange Online		0 60,00 min		
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E-mail accounts				
	User name	Password	Туре	Available
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0			Monitor-to-Monitor	
			CRM	
			SRM	
			Part Part	
			Customer order	
			Case	
			Quote	
			Purchase order	
			Inquiry	
			Personnel	
			Project	
				,

12. Click on "Available" and set your preferred permissions ("Available to all" by default).

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Serv	er sett	tings											
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13. Press the green icon to validate the selected address.

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14. Press "Save" then close the procedure.

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