

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

Introduction

This document briefly describes a general example of activating user name & password authentication 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 user name/password method.

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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

- Only one 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.
- Two-factor authentication cannot be used with the user name & password authentication method.

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 User name/password authentication method according to guidelines from Microsoft:

<https://learn.microsoft.com/en-us/powershell/module/exchange/new-applicationaccesspolicy?view=exchange-ps>

User name & password authentication

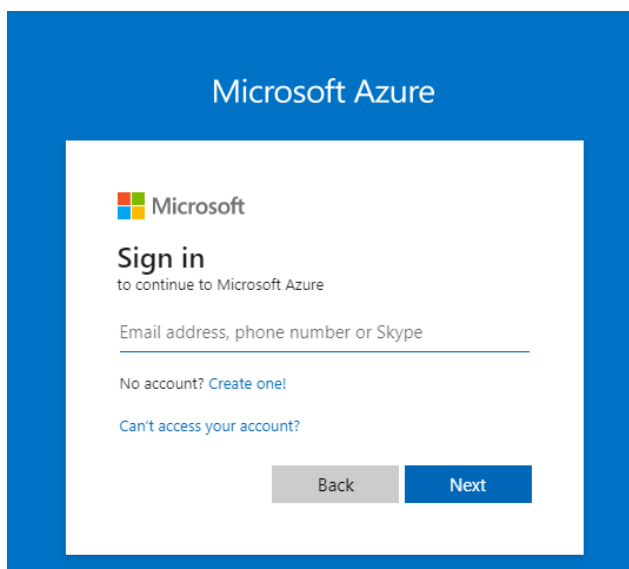
Microsoft Azure setup

Please note: Microsoft currently provides two administrative portals:

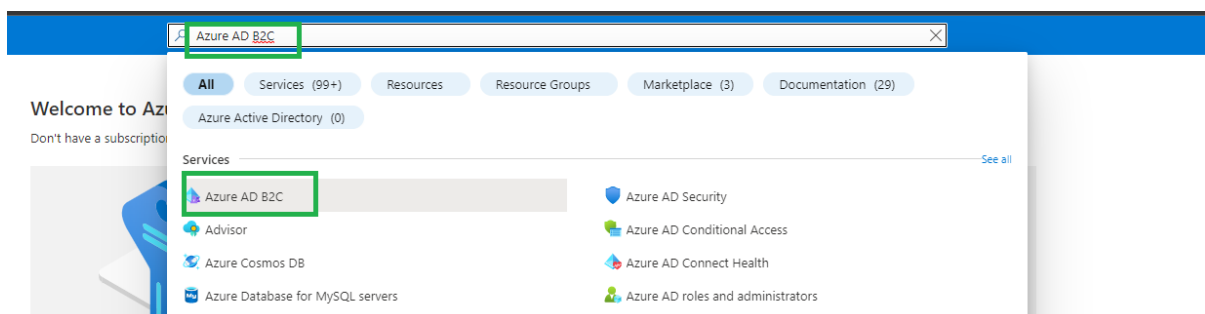
- portal.azure.com
- entra.microsoft.com

The guide below describes the setup process in Microsoft Azure.

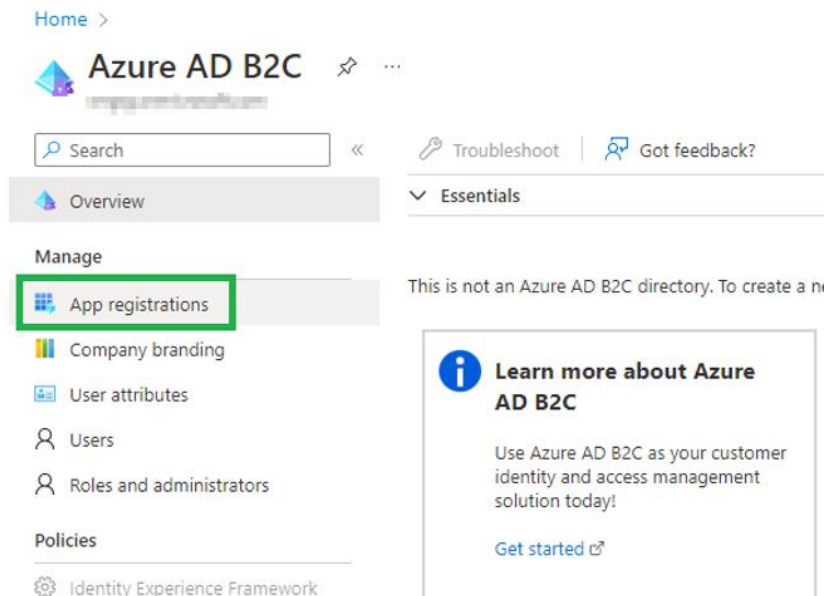
1. Sign in with an existing account at <https://portal.azure.com>.



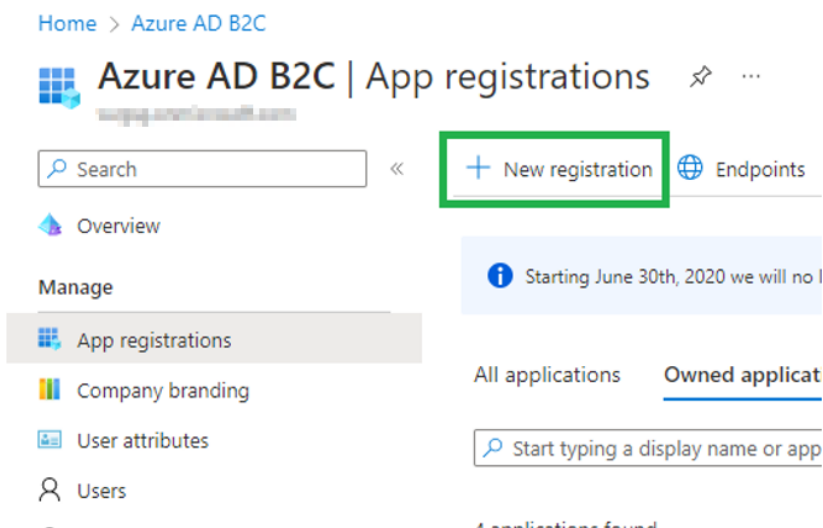
2. Once signed in, search for and access "Azure AD B2C".



3. Click on "App registrations".



4. Click on "New registration".



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

[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 1 ✓

Supported account types

Who can use this application or access this API?

- ☒ Accounts in this organizational directory only (Single tenant) 2
- ☐ 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)
- ☐ Personal Microsoft accounts only

[Help me choose...](#)

6. 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

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- ☐ 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.

Select a platform ▼ e.g. https://example.com/auth

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

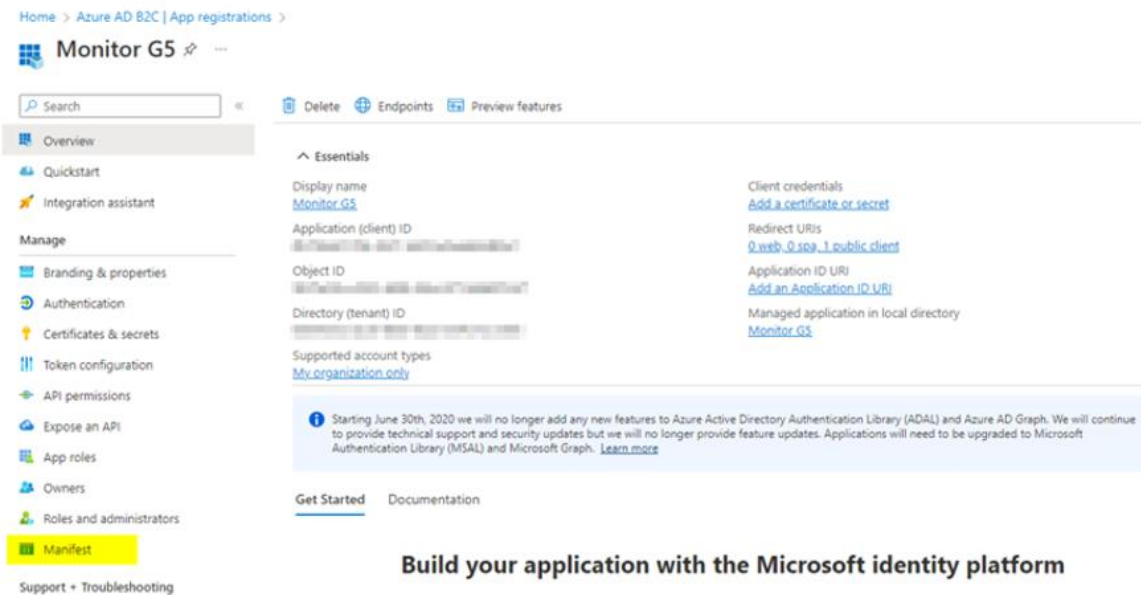
7. You will be forwarded to the menu of the application you just registered, if not - click on the application.

The screenshot shows the 'Monitor G5' application page in the Azure AD B2C App registrations portal. The left sidebar contains navigation links: Overview, Quickstart, Integration assistant, Manage, Branding & properties, Authentication, Certificates & secrets, Token configuration, API permissions, Expose an API, App roles, Owners, Roles and administrators, Manifest, and Support & Troubleshooting. The main content area is titled 'Essentials' and lists several properties: Display name (Monitor G5), Application (client) ID, Object ID, Directory (tenant) ID, and Supported account types (My organization only). To the right of these properties are links for Client credentials, Redirect URIs, Application ID URI, and Managed application in local directory. A blue banner at the bottom of the Essentials section contains a message about the deprecation of ADAL and Azure AD Graph, stating that starting June 30th, 2020, new features will not be added and existing applications will need to be upgraded to MSAL and Microsoft Graph. Below the banner are links for 'Get Started' and 'Documentation'. At the bottom of the page is the text 'Build your application with the Microsoft identity platform'.

8. Copy the values of the Application (client) ID and Directory (tenant) ID and save them, you will need them later.

This screenshot is identical to the one above, showing the 'Monitor G5' application page. However, it includes two red circles with numbers '1' and '2' highlighting the 'Application (client) ID' and 'Directory (tenant) ID' fields, respectively, to indicate where the user should copy the values. The rest of the page content, including the sidebar, navigation links, and banners, remains the same.

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



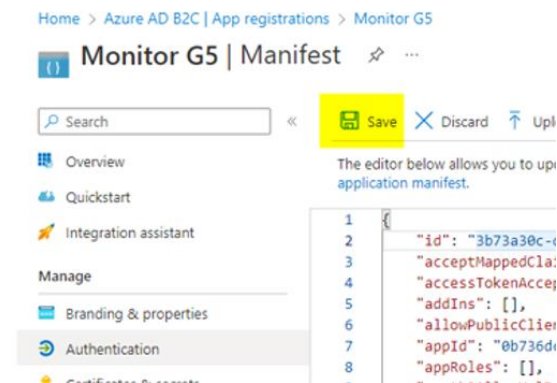
10. We need to add the authentication method to our manifest, this can be done by copying and pasting the code found under the section "Configure for delegated authentication" in the documentation from Microsoft.

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

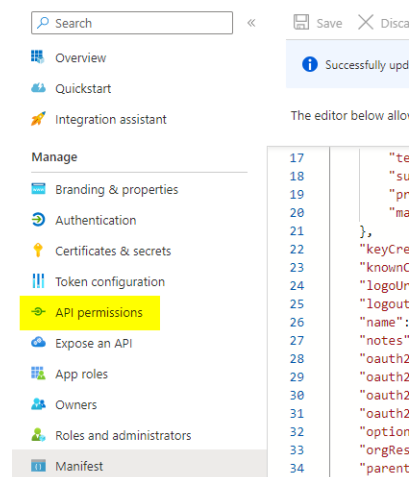
For example, copy and add the delegated authentication code to the "Manifest" as shown below:

```
[
  {
    "resourceAppId": "00000002-0000-0ff1-ce00-000000000000",
    "resourceAccess": [
      {
        "id": "3b5f3d61-589b-4a3c-a359-5dd4b5ee5bd5",
        "type": "Scope"
      }
    ]
  },
  {
    "resourceAppId": "00000003-0000-0000-c000-000000000000",
    "resourceAccess": [
      {
        "id": "e1fe6dd8-ba31-4d61-89e7-88639da4683d",
        "type": "Scope"
      }
    ]
  }
]
```

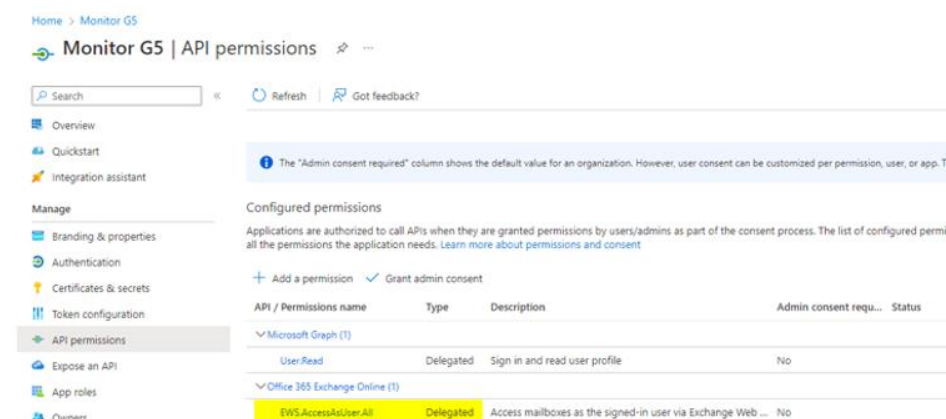
11. Save the "Manifest" settings.



12. Click on “API permissions” in the left-hand menu.

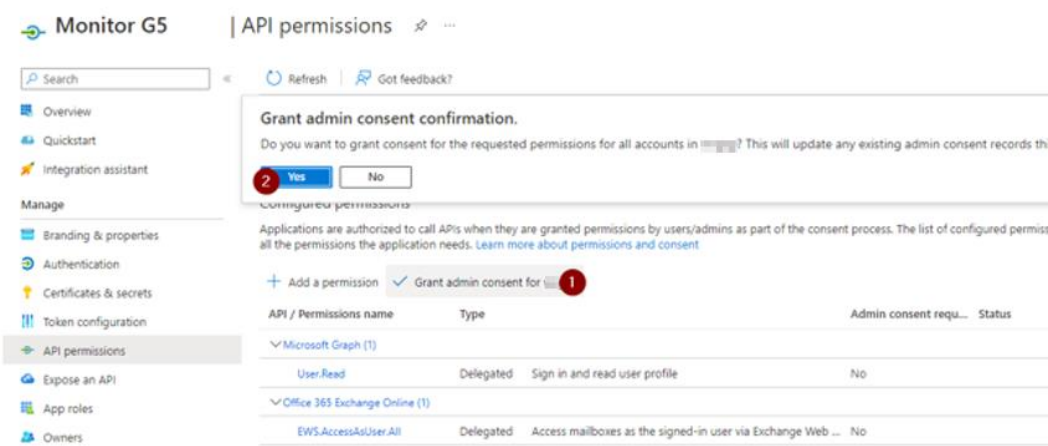


13. Confirm that the permissions has been added (**EWS.AccessAsUser.All**, Type: **Delegated**).

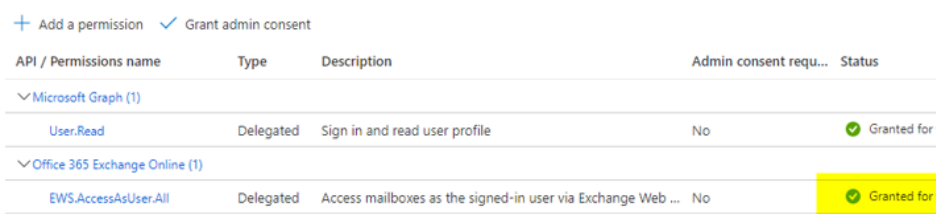


14. Grant admin consent.

Monitor ERP **requires full access** to Exchange Online, additional security settings may be applied to adapt the level of security.



15. Verify that the icon is green.



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

Home > Monitor G5

Monitor G5 | API permissions

Search Refresh Got feedback?

Overview
Quickstart
Integration assistant

Manage

- Branding & properties
- Authentication**
- Certificates & secrets
- Token configuration
- API permissions
- Expose an API

The "Admin consent required" column shows the default value for an organization.

Configured permissions

Applications are authorized to call APIs when they are granted permissions by user. All the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent

API / Permissions name	Type	Description
▼ Microsoft Graph (1)		
User.Read	Delegated	Sign in and read user profile

17. Under "Advanced settings", set "Enable the following mobile and desktop flows" to "Yes".

Home > Azure AD B2C | App registrations > Monitor G5

Monitor G5 | Authentication

Search Got feedback?

Overview
Quickstart
Integration assistant

Manage

- Branding & properties
- Authentication**
- Certificates & secrets
- Token configuration
- API permissions
- Expose an API
- App roles

Supported account types

Who can use this application or access this API?

☒ Accounts in this organizational directory only (Single tenant)
☐ Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)

[Help me decide...](#)

Advanced settings

Allow public client flows

Enable the following mobile and desktop flows:

Yes No

- App collects plaintext password (Resource Owner Password Credential Flow) [Learn more](#)
- No keyboard (Device Code Flow) [Learn more](#)
- SSO for domain-joined Windows (Windows Integrated Auth Flow) [Learn more](#)

18. Save the settings.

Advanced settings

Allow public client flows

Enable the following mobile and desktop flows:

Yes No

- App collects plaintext password (Resource Owner Password Credential Flow) [Learn more](#)
- No keyboard (Device Code Flow) [Learn more](#)
- SSO for domain-joined Windows (Windows Integrated Auth Flow) [Learn more](#)

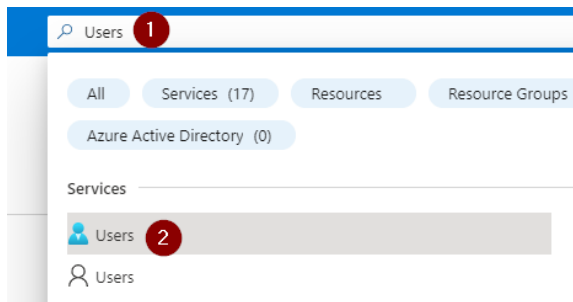
App instance property lock

Configure the application instance modification lock. [Learn more](#)

[Configure](#)

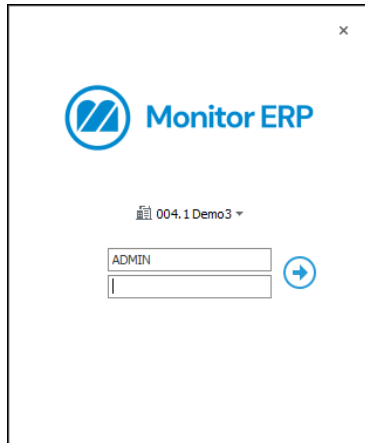
Save Discard

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

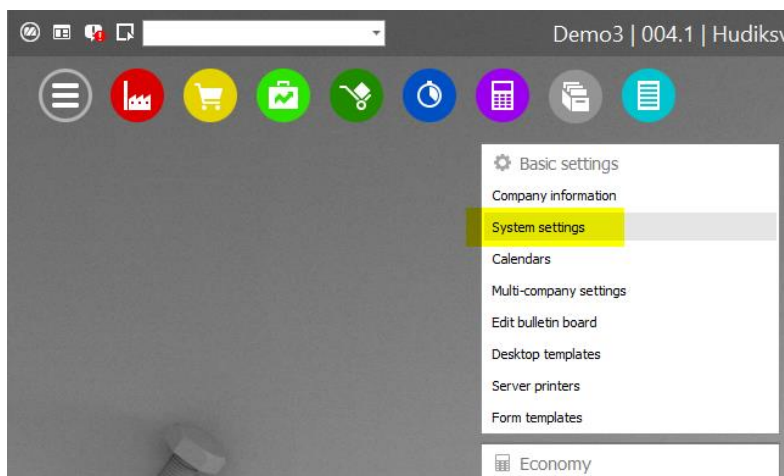


Monitor ERP setup (User name/password method)

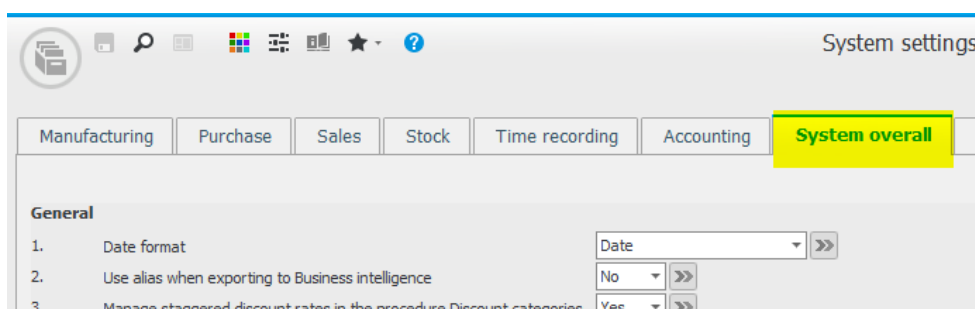
1. Start the Monitor ERP client and sign in with the appropriate admin account.



2. Access the "System settings" procedure.



3. Click on the "System overall" tab.



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

System settings

Manufacturing Purchase Sales Stock Time recording Accounting **System overall** Mobile client Agent

General

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. Part grouping term for discount categories: Product group
5. Company is approved for F-tax: Yes
6. Time when order day/start day changes to next day: 12:00
7. Show identifier for external programs (Extra fields): No
8. Search indexing (Monitor search): Yes

Backup

9. Number of days before warning: 3
10. E-mail sender of backup notification:
11. User name (Exchange):
12. Password (Exchange):

E-mail

13. E-mail method: Server based, via Microsoft Exchange Online
14. Server address (Exchange/SMTP): 192.168.100.13
15. Port (Exchange/SMTP): 0
16. User name (SMTP):
17. Password (SMTP):
18. Use SSL: No

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

System settings

Manufacturing Purchase Sales Stock Time recording Accounting **System overall** Mobile client Agent

General

1. Date format: Date
2. Use alias when exporting to Business intelligence: No
3. Manage staggered discount rates in the procedure Discount categories: Yes
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Backup

9. Number of days before warning: 3
10. E-mail sender of backup notification:
11. User name (Exchange):
12. Password (Exchange):

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

6. Paste the Application (client) ID in the corresponding field.

System settings

Manufacturing Purchase Sales Stock Time 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

Microsoft Entra ID (Azure Exchange/SharePoint)

20. Application (client) ID:
21. Directory (tenant) ID:
22. Authentication flow: User name/Password
23. Client secret:

7. Paste the Directory (tenant) ID in the corresponding field.

System settings

Manufacturing Purchase Sales Stock Time 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

Microsoft 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 "User name/password".

System settings

Manufacturing Purchase Sales Stock Time recording Accounting **System overall** Mobile client

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

Microsoft Entra ID (Azure Exchange/SharePoint)

20. Application (client) ID: *****

21. Directory (tenant) ID: *****

22. Authentication flow: User name/Password

23. Client secret:

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

System settings

Manufacturing Purchase Sales Stock Time recording Accounting **System overall** Mobile client

E-mail

13. E-mail method: Server based, via Microsoft Exchange Online

14. Server address (Exchange/SMTP): outlook.office365.com

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

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

The screenshot shows the 'System settings' window with the 'System overall' tab selected. Under the 'E-mail' section, the following settings are visible:

- 13. E-mail method: Server based, via Microsoft Exchange Online
- 14. Server address (Exchange/SMTP): outlook.office365.com
- 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

A green checkmark icon is visible next to the server address field.

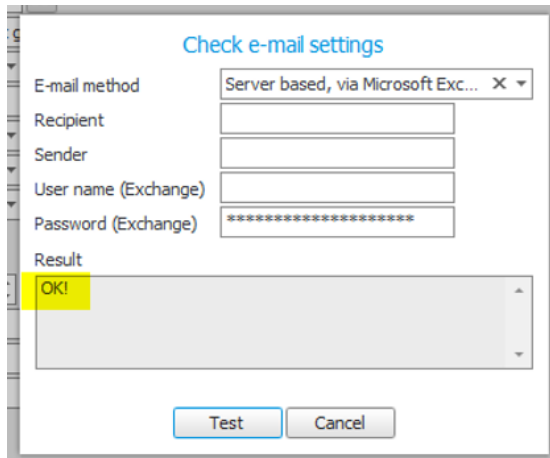
11. Set e-mail method to "Server based, via Microsoft Exchange Online".

The screenshot shows the 'Check e-mail settings' dialog box. The 'E-mail method' dropdown is set to 'Server based, via Microsoft Exchange Online'. The 'Recipient', 'Sender', 'User name (Exchange)', and 'Password (Exchange)' fields are empty. The 'Result' field is also empty. The 'Test' and 'Cancel' buttons are at the bottom.

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

The screenshot shows the 'Check e-mail settings' dialog box. The 'E-mail method' dropdown is set to 'Server based, via Microsoft Exchange Online'. The 'Recipient', 'Sender', 'User name (Exchange)', and 'Password (Exchange)' fields are highlighted in yellow, indicating they are the focus for input. The 'Result' field is also empty. The 'Test' and 'Cancel' buttons are at the bottom.

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



Check e-mail settings

E-mail method: Server based, via Microsoft Exc... X ▾

Recipient:

Sender:

User name (Exchange):

Password (Exchange):

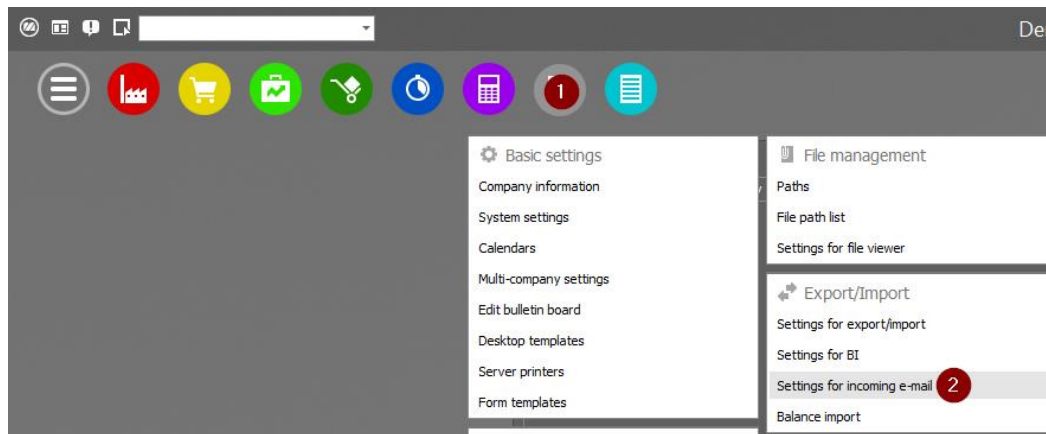
Result: OK!

Test Cancel

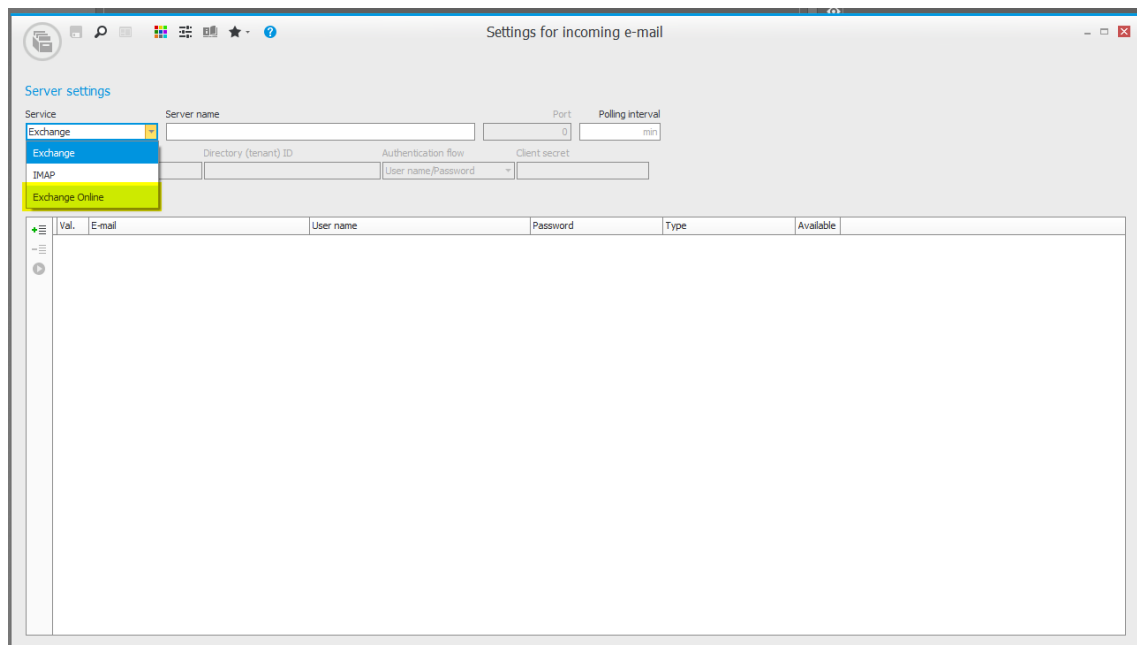
(Please note: If the service has been set up recently you may receive a **403 Forbidden message** due to delays when updating a tenant in Microsoft Azure portal. In this case, wait a moment then press "Test" again. If you encounter other messages in the "Result" box, please refer to the online documentation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

Settings for incoming e-mail (User name/password method)

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



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



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

Settings for incoming e-mail

Server settings

Service: Exchange Online

Server name: outlook.office365.com

Port: 0

Polling interval: 0 min

Application (client) ID: [empty]

Directory (tenant) ID: [empty]

Authentication flow: User name/Password

Client secret: [empty]

E-mail accounts

Val.	E-mail	User name	Password	Type	Available
------	--------	-----------	----------	------	-----------

2 errors

- Applica... Application (client) ID is missing
- Directo... Directory (tenant) ID is missing

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.

Settings for incoming e-mail

Server settings

Service: Exchange Online

Server name: outlook.office365.com

Port: 0

Polling interval: 60,00 min

Application (client) ID: [empty]

Directory (tenant) ID: [empty]

Authentication flow: User name/Password

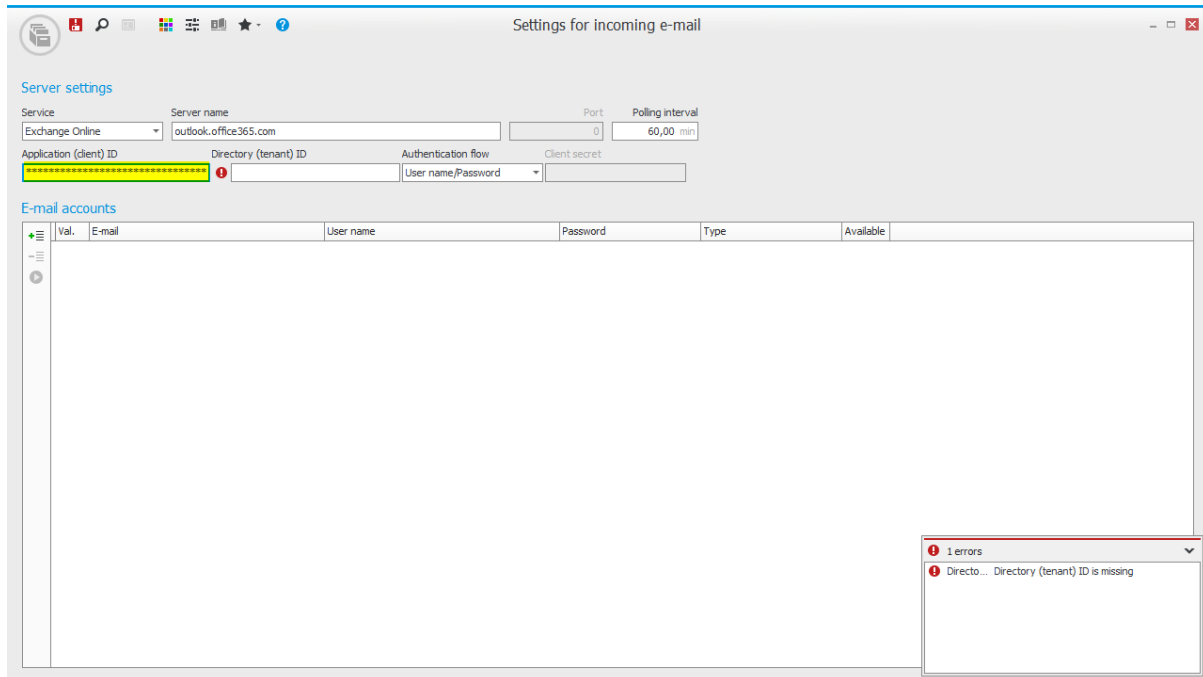
Client secret: [empty]

E-mail accounts

Val.	E-mail	User name	Password	Type	Available
------	--------	-----------	----------	------	-----------

2 errors

- Applica... Application (client) ID is missing
- Directo... Directory (tenant) ID is missing

5. Enter the Application (client) ID.

Settings for incoming e-mail

Server settings

Service: Exchange Online | Server name: outlook.office365.com | Port: 0 | Polling interval: 60,00 min

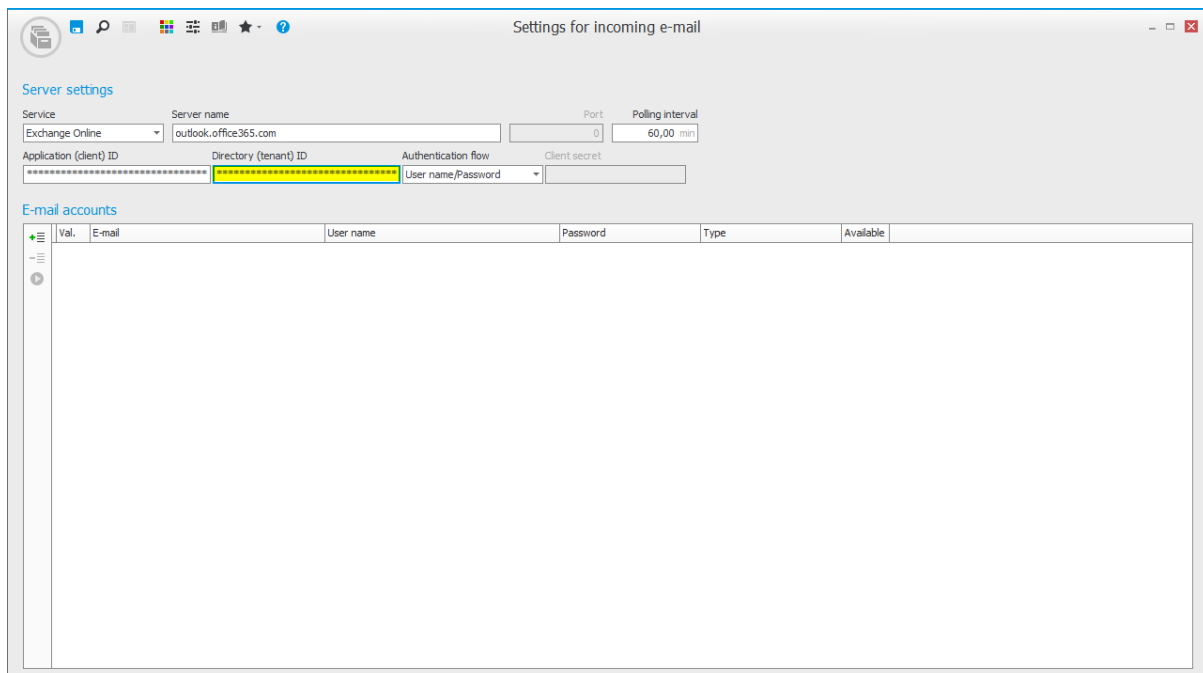
Application (client) ID: [highlighted] | Directory (tenant) ID: [empty] | Authentication flow: User name/Password | Client secret: [empty]

E-mail accounts

Val.	E-mail	User name	Password	Type	Available
------	--------	-----------	----------	------	-----------

1 errors

- Directo... Directory (tenant) ID is missing

6. Enter the Directory (tenant) ID.

Settings for incoming e-mail

Server settings

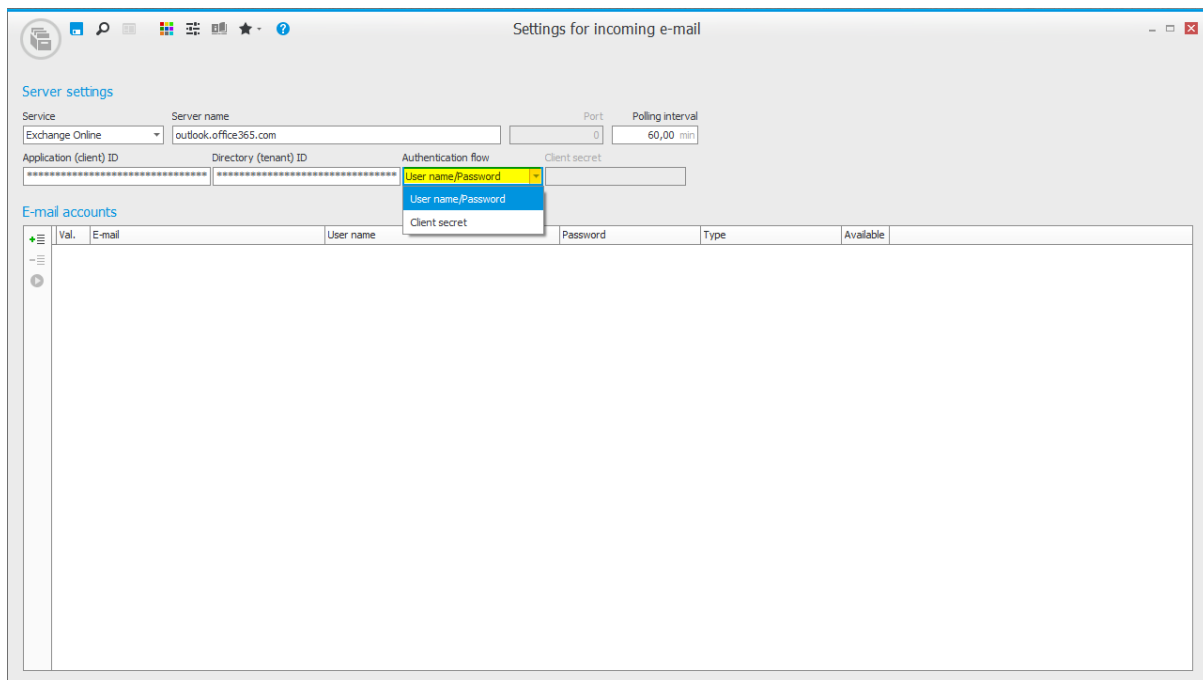
Service: Exchange Online | Server name: outlook.office365.com | Port: 0 | Polling interval: 60,00 min

Application (client) ID: [empty] | Directory (tenant) ID: [highlighted] | Authentication flow: User name/Password | Client secret: [empty]

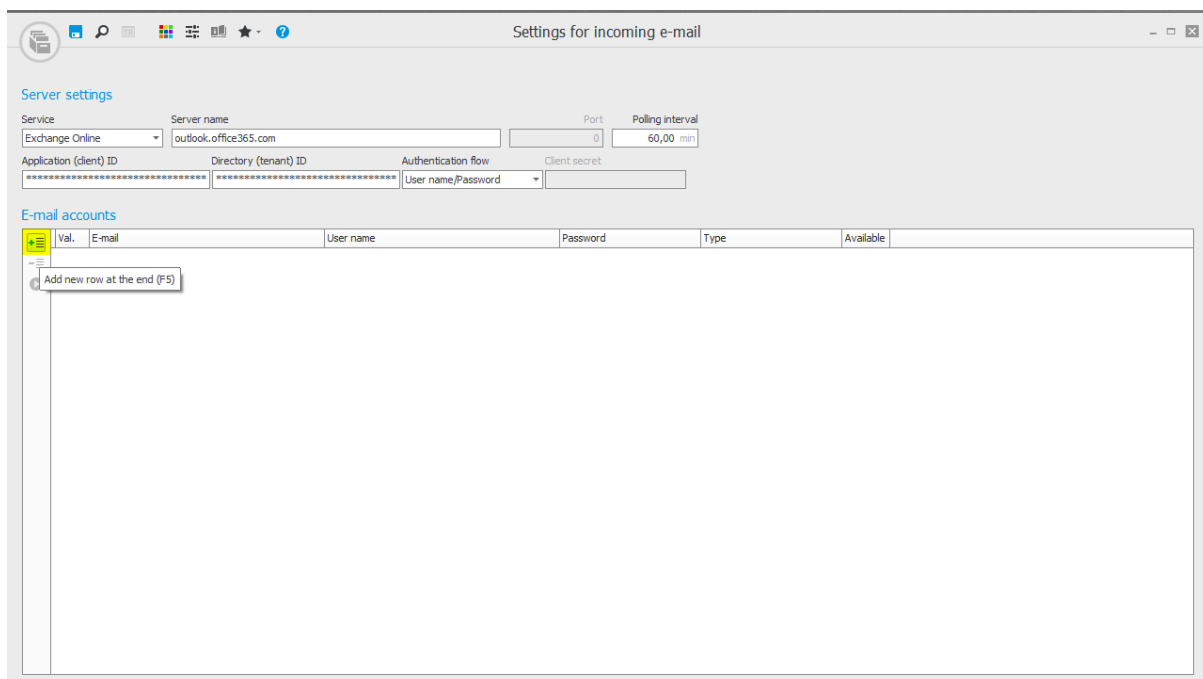
E-mail accounts

Val.	E-mail	User name	Password	Type	Available
------	--------	-----------	----------	------	-----------

7. "Authentication flow" should be set to "User name/Password".



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



9. Enter the e-mail address.

Settings for incoming e-mail

Server settings

Service: Exchange Online | Server name: outlook.office365.com | Port: 0 | Polling interval: 60,00 min

Application (client) ID: | Directory (tenant) ID: | Authentication flow: User name/Password | Client secret:

E-mail accounts

Val.	E-mail	User name	Password	Type	Available
					>>

2 errors

- Passw... Incorrect value
- User n... Incorrect value

10. Enter the user name.

Settings for incoming e-mail

Server settings

Service: Exchange Online | Server name: outlook.office365.com | Port: 0 | Polling interval: 60,00 min

Application (client) ID: | Directory (tenant) ID: | Authentication flow: User name/Password | Client secret:

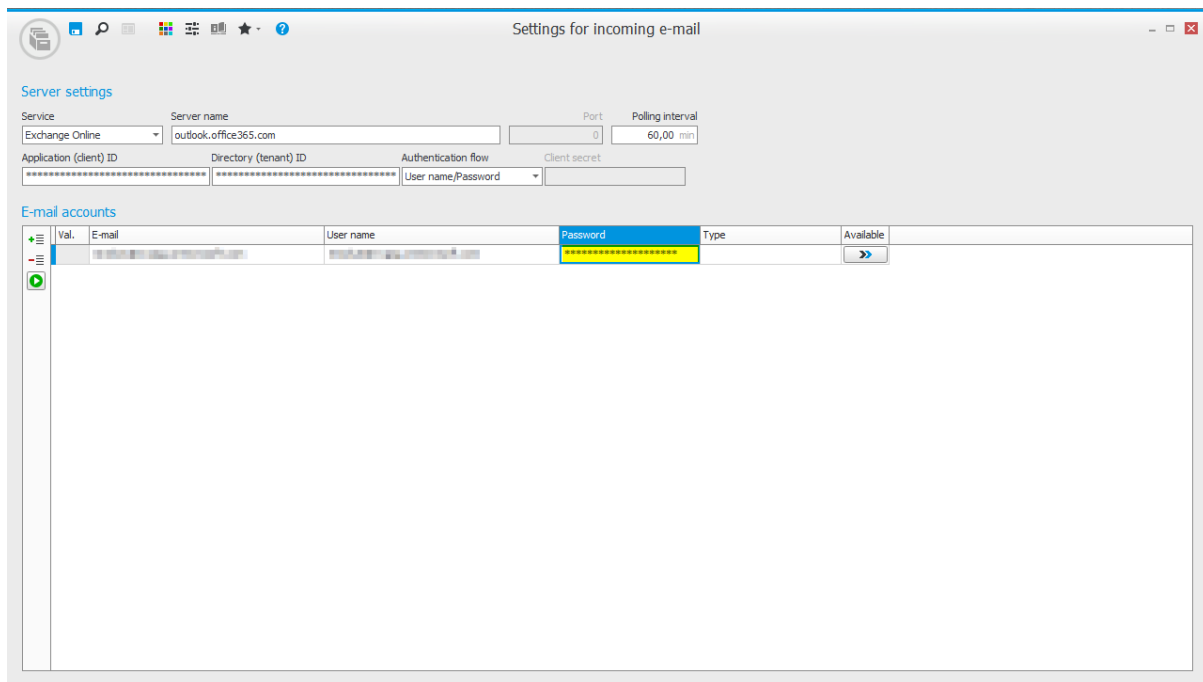
E-mail accounts

Val.	E-mail	User name	Password	Type	Available
					>>

1 errors

- Passw... Incorrect value

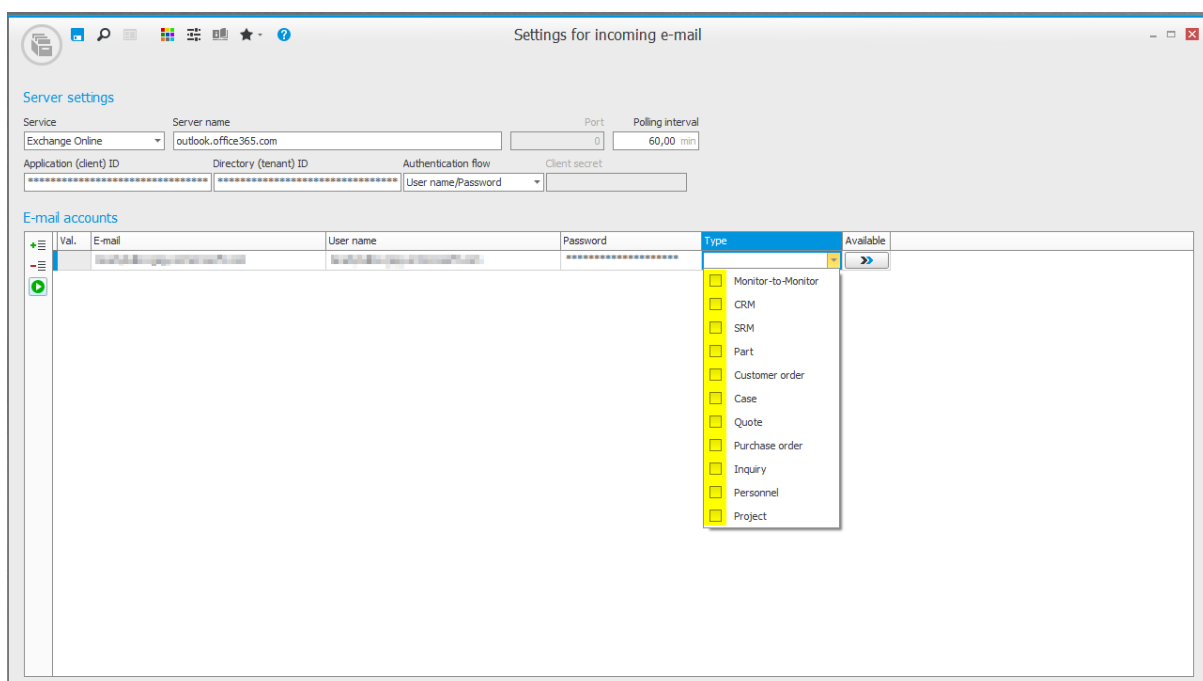
11. Enter the password.



The screenshot shows the 'Settings for incoming e-mail' window. Under 'Server settings', the 'Service' is 'Exchange Online', 'Server name' is 'outlook.office365.com', 'Port' is '0', and 'Polling interval' is '60,00 min'. The 'Authentication flow' is 'User name,Password'. The 'E-mail accounts' table has one entry with a highlighted password field.

Val.	E-mail	User name	Password	Type	Available

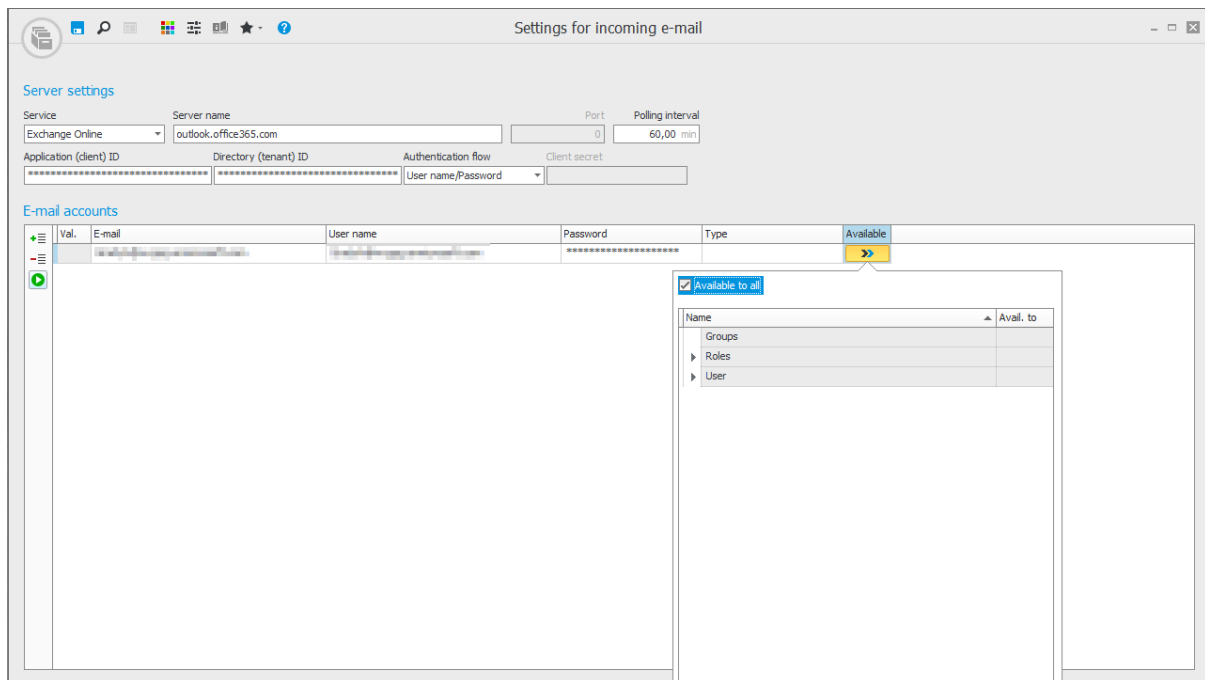
12. Select all "Types" that apply to your configuration of Monitor ERP, for example "Monitor-to-Monitor".



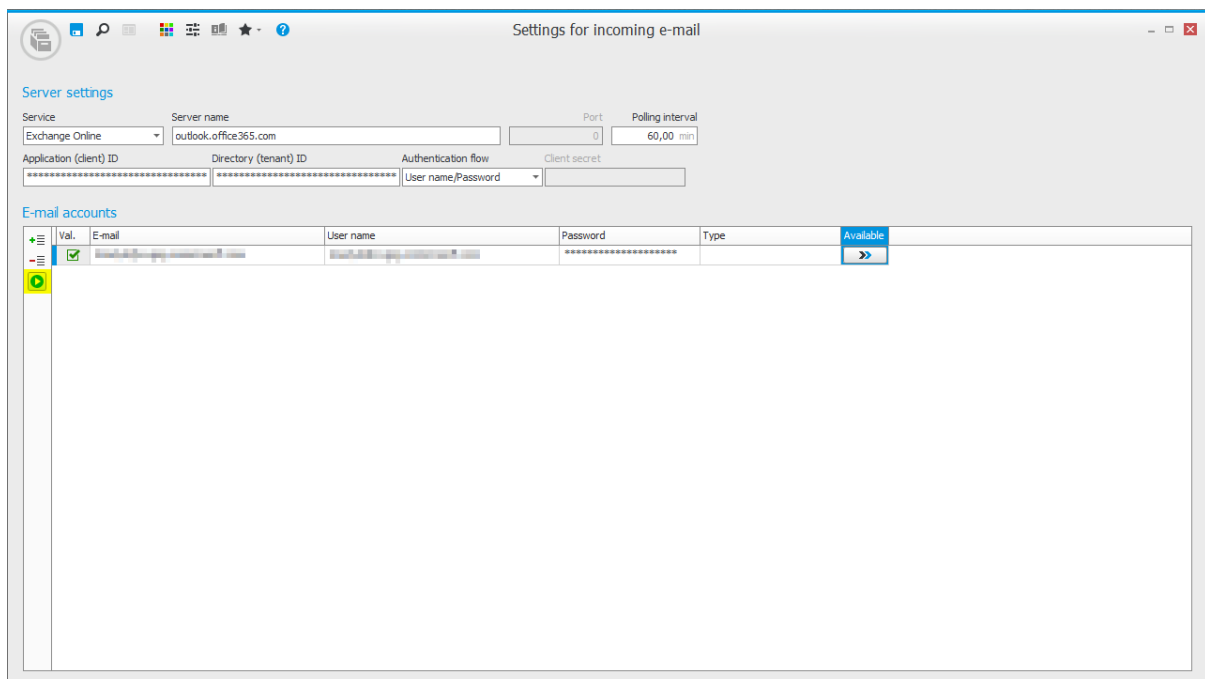
The screenshot shows the 'Settings for incoming e-mail' window. The 'E-mail accounts' table has one entry with a dropdown menu open for the 'Type' column. The dropdown menu lists the following types: Monitor-to-Monitor, CRM, SRM, Part, Customer order, Case, Quote, Purchase order, Inquiry, Personnel, and Project.

Val.	E-mail	User name	Password	Type	Available
				<ul style="list-style-type: none"><input type="checkbox"/> Monitor-to-Monitor<input type="checkbox"/> CRM<input type="checkbox"/> SRM<input type="checkbox"/> Part<input type="checkbox"/> Customer order<input type="checkbox"/> Case<input type="checkbox"/> Quote<input type="checkbox"/> Purchase order<input type="checkbox"/> Inquiry<input type="checkbox"/> Personnel<input type="checkbox"/> Project	

13. Click on “Available” and set your preferred permissions (“Available to all” by default).



14. Press the green icon to validate the selected address.



15. Press "Save" then close the procedure.

Settings for incoming e-mail

Server settings

Service: Exchange Online
Server name: outlook.office365.com
Port: 0
Polling interval: 60,00 min

Application (client) ID:
Directory (tenant) ID:
Authentication flow: User name/Password
Client secret:

E-mail accounts

Val.	E-mail	User name	Password	Type	Available
<input checked="" type="checkbox"/>	[redacted]	[redacted]	[redacted]		Available >>