

How to configure Sage 100 OAuth E-mail settings for use with a Microsoft 365 App Registration

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Summary

How to configure Sage 100 OAuth E-mail settings for use with a Microsoft 365 App Registration

Sage Customer Support does not provide assistance for issues related to third party products or enhancements, hardware, report customizations, state or federal tax-related questions, or specific accounting questions. Please contact your Sage business partner, network administrator, or accountant for assistance. Please review [this document](#) for additional information on the scope of Sage Customer Support Services.

Resolution

Note: Sage Customer Support cannot assist setting up OAuth Authentication to connect to various SMTP Mail Servers.

This information is provided to assist Sage 100 Business Partners or Customers familiar with the SMTP (Mail) Server being used.

While Sage cannot provide guidance for all SMTP Server configurations, the following is an example, and to be used as guidance, on how to connect Sage 100 to Microsoft 365 using OAuth

Please consult with your Sage 100 Business Partner or Sage City if you are not familiar with SMTP (Mail) Server setup.

1. Create the app registration if not already completed

1. Logon to your Microsoft Azure Portal account (portal.azure.com) as the admin user
2. Go to Azure Active Directory / App Registrations and click New Registration
 - Enter the Display Name: (user-defined)
 - Select Who can use: Single tenant
 - Enter the Redirect URI: (Platform = Public client/native) <https://localhost>
3. Click Register
 - Tip: copy the Application (client) Id and save it for later reference
 - Tip: click Endpoints and copy the Authorization endpoint (v2) and the Token endpoint (v2) for later use. Then Close Endpoints
4. Click API permissions / Add a permission / Select Microsoft Graph and then Delegated Permissions
5. Select the offline_access and SMTP.Send permissions and then click Add permissions
 - There should be 3 permissions at this point: offline_access, SMTP.Send, User.Read
6. Click Grant admin consent for (user) for these permissions
 - The new app registration should now be ready for use

2. Verify SMTP settings in the Microsoft 365 Admin Center

1. Logon to www.office.com as the admin user
2. Type admin in the search field and select the Admin app in the search results
3. In the Admin Center, click Users / Active Users and select the admin user used to create the App Registration
4. Click Mail / Manage email apps
5. Make sure the "Authenticated SMTP" checkbox is checked and save changes

3. Open the E-mail tab in Sage 100, Library Master, Company Maintenance, and select the OAuth Authentication Method.

1. Enter the Address: smtp.office365.com
2. Accept default Port: 587
3. Accept default SMTP Encryption: TLS
4. Enter your User ID: (the email/admin user used to create the App Registration)
5. Enter the Client ID for this app registration
6. The Client Secret is not required for Microsoft 365
7. Enter the Auth endpoint for this app registration
8. Enter the Token endpoint for this app registration
9. Enter the Scope: https://outlook.office.com/SMTP.Send offline_access
10. Enter the Redirect URL used above: <https://localhost>
11. Accept the default Code Challenge Method: S265
12. Click Accept to save the company record and then click Test Email to initiate the authentication process

Note: On the initial auth process, a user interface is launched where you will be prompted for the user and password. After that the system will use a token and a refresh token to send SMTP emails without user interaction. This will continue if emails are sent from the company at least every 90 days. However, after 90

days of inactivity, the refresh token will expire which will cause the UI to launch again, stopping the email send, and require the user and password.

- This refresh token expiration is specific to Microsoft 365 and may vary with other providers.

How to create an Alias username in the Microsoft 365 Admin Center to use as the friendly-from email address in Sage 100 Paperless Office Forms Electronic Delivery Options:

1. Logon to www.Office.com as the admin user
2. Type admin in the search field and select the Admin app in the search results
3. In the Admin Center, click Users / Active Users and select the admin user used to create the App Registration
4. On the Account tab click Manage username and email
5. Enter an Alias Username and click Add and then click Save changes
6. In Sage 100 go to Paperless Office / Setup / Form Maintenance
7. Select the desired form printing setting and enter the alias username (email address) in the From E-mail Address field
 - Note: Don't use the alias username in the email settings in Company Maintenance. This must be the primary username used to authenticate the App Registration

Related resources

- [Using OAuth 2.0 with Sage 100](#)

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Applies to: Configuration > Settings and preferences