SQLW¢rks

Title of document	How to Authorise SQLWorks to use a Microsoft 365 email account
Author	Naomi Joachim
Date Created	9 th January 2023

Purpose

This procedure explains how to authorise SQLWorks to use your Microsoft 365 email account. Within SQLWorks you can connect an email account to allow you to quickly drag email from your work account into the SQLWorks email list so that the email can be shared and tagged to relevant items.

Scope

This procedure applies to all Lineal Software Solutions staff, as well as any prospective customers or clients who intend to utilise SQLWorks within their business environment. The procedure is aimed at all users, who will be operating the SQLWorks client and use Microsoft 365 for their email account.

Change History:

Date	Version	Created by	Description of change	Approved by
09.01.23	1	Naomi Joachim		

To setup and use a Microsoft 365 email address with SQLWorks you will need to authorise your device first - you can do this from within the user prefs record for your user.

QLW orks	Update User Details Revert State Demo User State Close Cancel
🔹 Customer Order Detail	Employee into Setup Diary Colours & Printing Accounts Tabs
👒 Sales Ledger Detail	User Info Group Title SQL Core Logon Group Title SQL Core Logon Group
Lineal Modules	Forename Naomi Last Logoff 6 Jan 2023 09:15
Lineal CRM	Surname Williams Last IP 10.
Diary	Position Count 1120
Phone Logs	Home Current Version 2023-01-04 / 10082005
	(excluding post code)
Cineal contracts	
Equipment Items	Post Code
Active Monitoring	
S Client Backups	eMail Group
Sales Accounts	User E-Mail Signature: MIP Mailboxes Show O InBox Mailboxes Show All
Products	email Account ID naomi.williams@lineal.co.uk
Stock Ledger	email Account PW Set/Update Password 🛞
🦗 Warehouse Map	HTML E-Mail Signature: NOTE - plain text will be inserted into **BODYTEXT** Test // Password Save No Yes Group Public
Extras	Message Count 25
Document Management	Delete Action O No Move to Trash Delete
Preferences	Digital signature Use SECURE to Connect No Yes OTLS
A line Refe	Use VERIFY when Connecting V Use oAuth2
User Prefs	iest 🖉 test 🖉 Set 📀 🔞

Note: - You may need to repeat these steps intermittently as determined by the rules on your Microsoft 365 account.

- 1. Go to User Prefs which can be found under Preferences on the main navigation bar
- 2. Click Edit and select the Employee info tab which should open by default
- 3. Ensure the full Microsoft 365 email address and email account password is entered into the email account ID and password field
- 4. You can set the From Address at this point as well if you wish and select if you want to save the password
- 5. Tick 'Use oAuth2'
- 6. Outside of SQLWorks open the default browser and sign into the correct Microsoft 365 account (The M365 account should match the email Account ID in SQLWorks)
- 7. Click the 'Set Token' button
- 8. The browser will open saying the account has authorised this device
- Click 'Test Read' you should now see a list of top-level mailboxes, if these don't appear, double check the user logged in on the browser is the same as the email Account ID or contact SQLWorks Support for further assistance
- 10. Click Save & Close at the top to confirm these changes







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