



Title of document	How to Authorise SQLWorks to use a Microsoft 365 email account
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### **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**

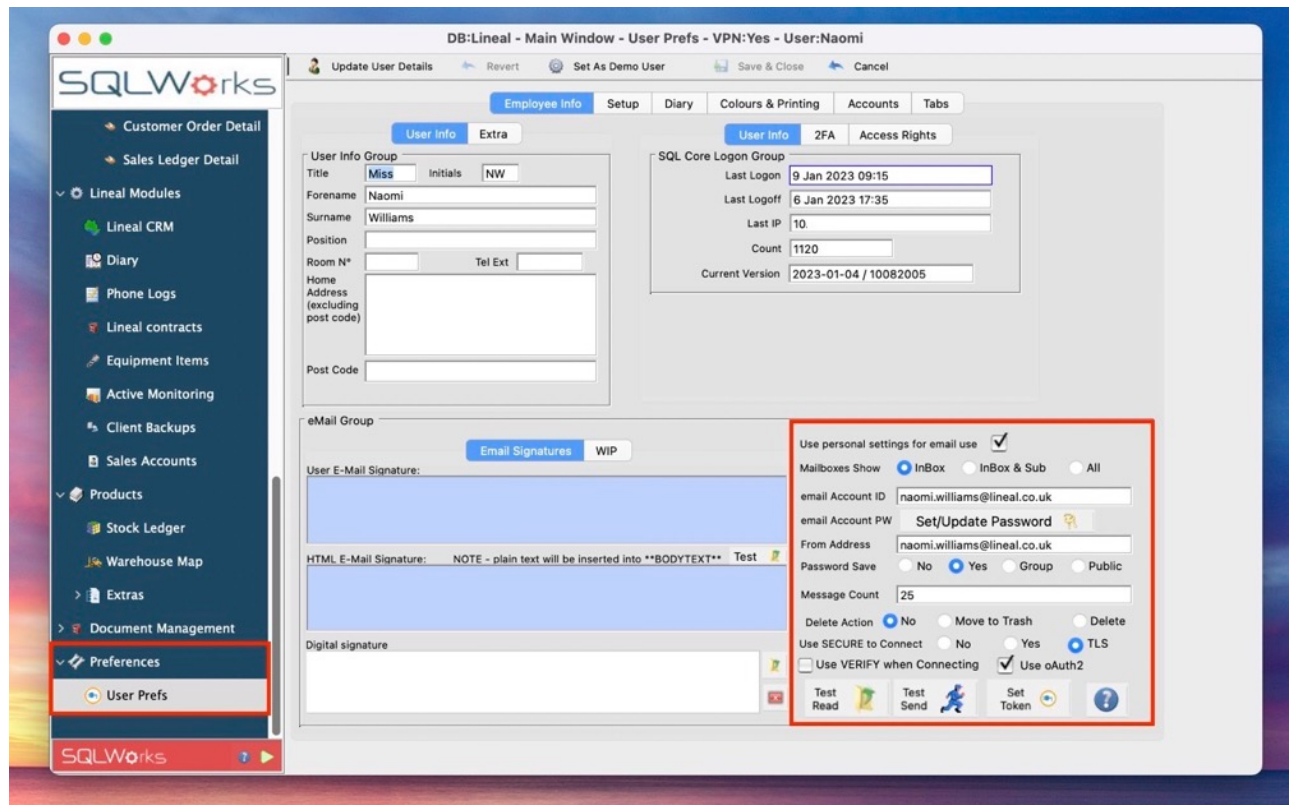
This procedure applies to all Lineal Software Solutions staff, as well as any prospective customers or clients who intend to utilise SQLWorks within their business environment. The procedure is aimed at all users, who will be operating the SQLWorks client and use Microsoft 365 for their email account.

## **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.

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
9. 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

