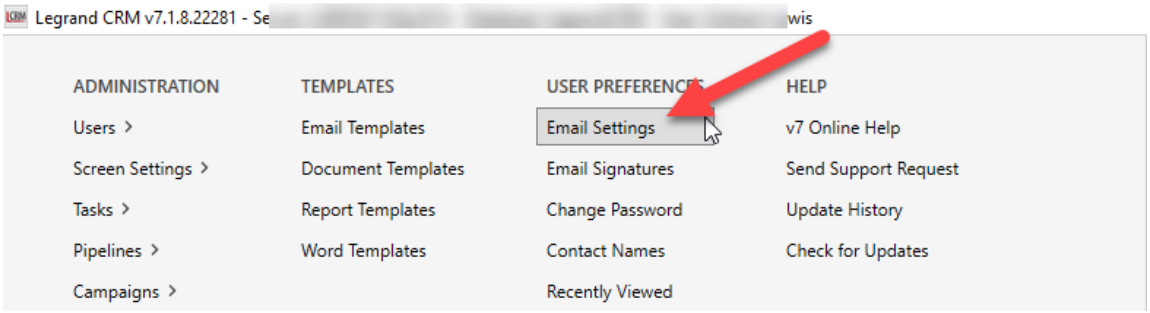
Enabling Mail Authentication using OAuth 2.0

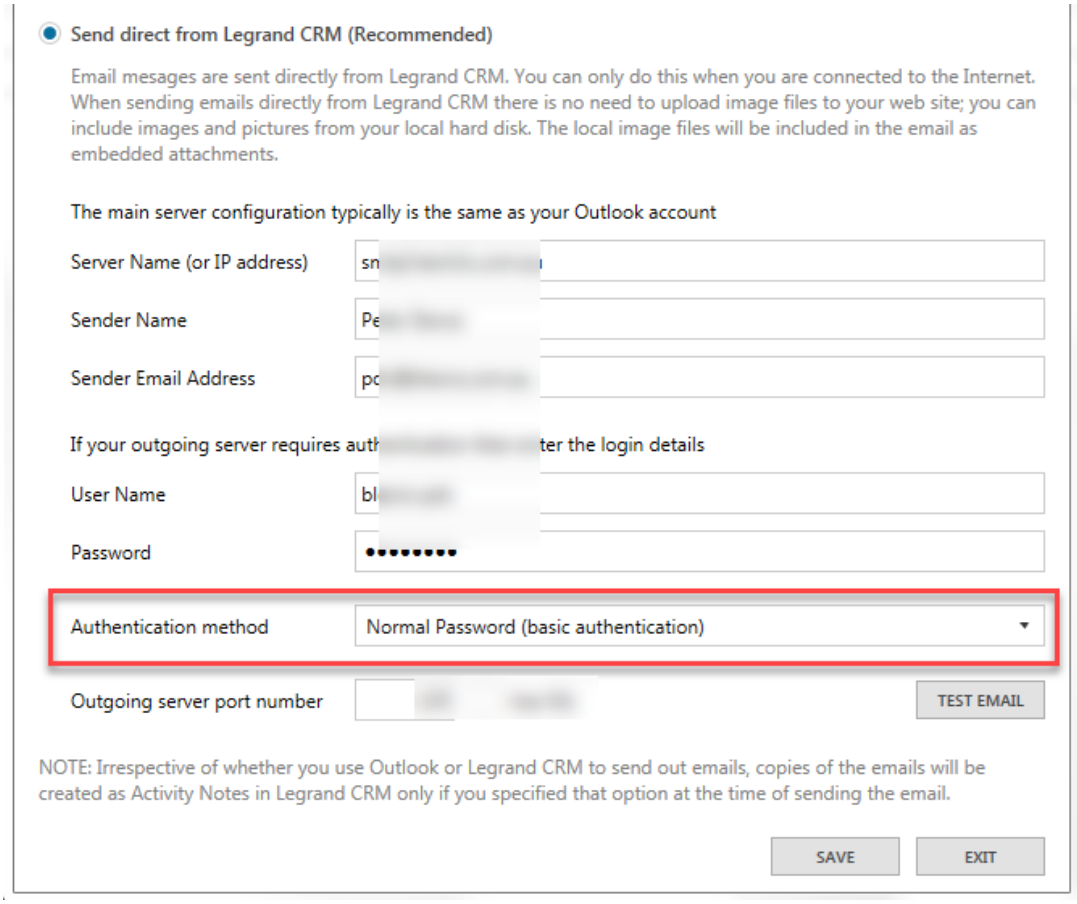
Overview

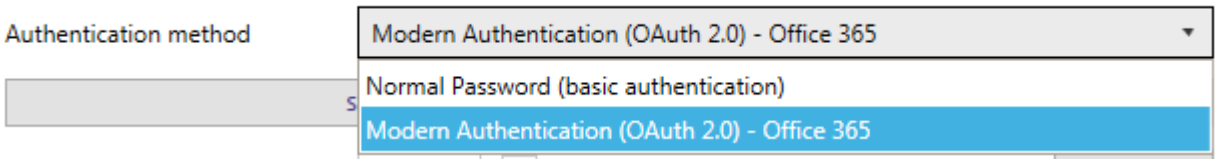
In release 7.1.8 of Legrand CRM we introduce the option to authenticate with a mail server using the OAuth 2.0 protocol (referred to as 'modern authentication' by Microsoft for their Office 365 mail service). Whilst this change is most likely to impact customers using Office 365 in the short term since Microsoft are moving to enforce use of this protocol, it is probable that other mail providers will also begin to insist on its use. The following instructions are targeted at Office 365, however the process for authenticating to other providers will be vey similar. If you use another mail provider, we recommend you switch to using this method of authentication since it offers better security. Please contact our support team via support@legrandcrm.com if you require any assistance in making that switch.

Converting your outgoing mail to OAuth 2.0

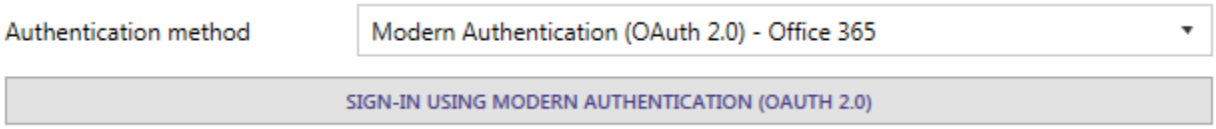
- In the Mail Settings window you will now see a dropdown choice between Basic Authentication and the new method in the 'Send Direct' section…



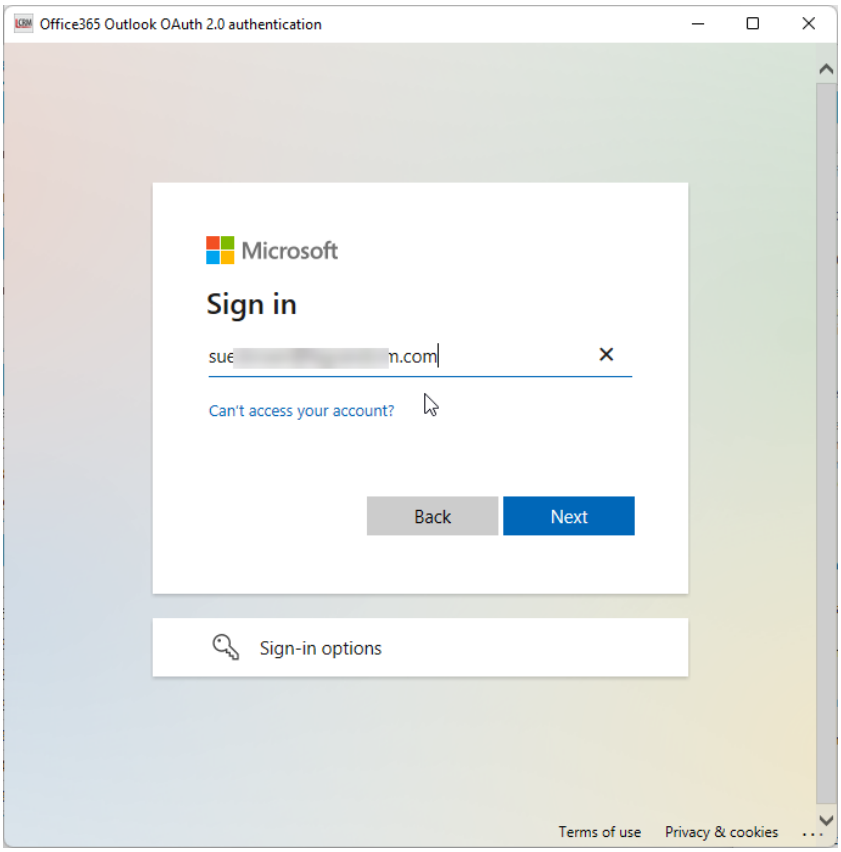




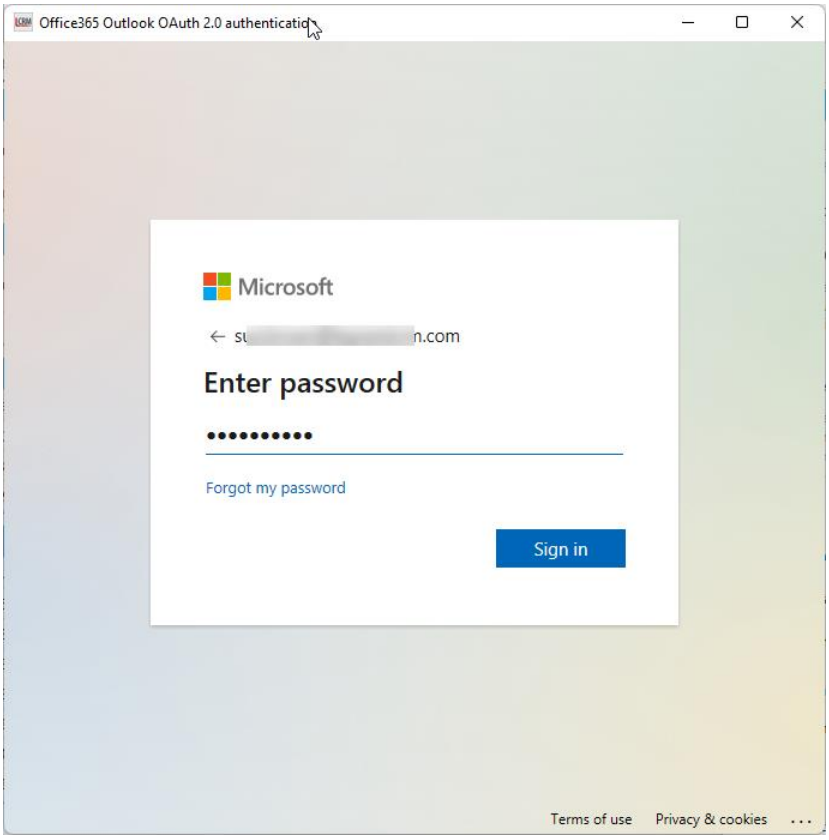
- Change any settings needed (most likely only the port number and / or SSL setting may need to change), then choose 'Modern Authentication…' from the dropdown. A button to 'Sign in using Modern Authentication…' will appear…



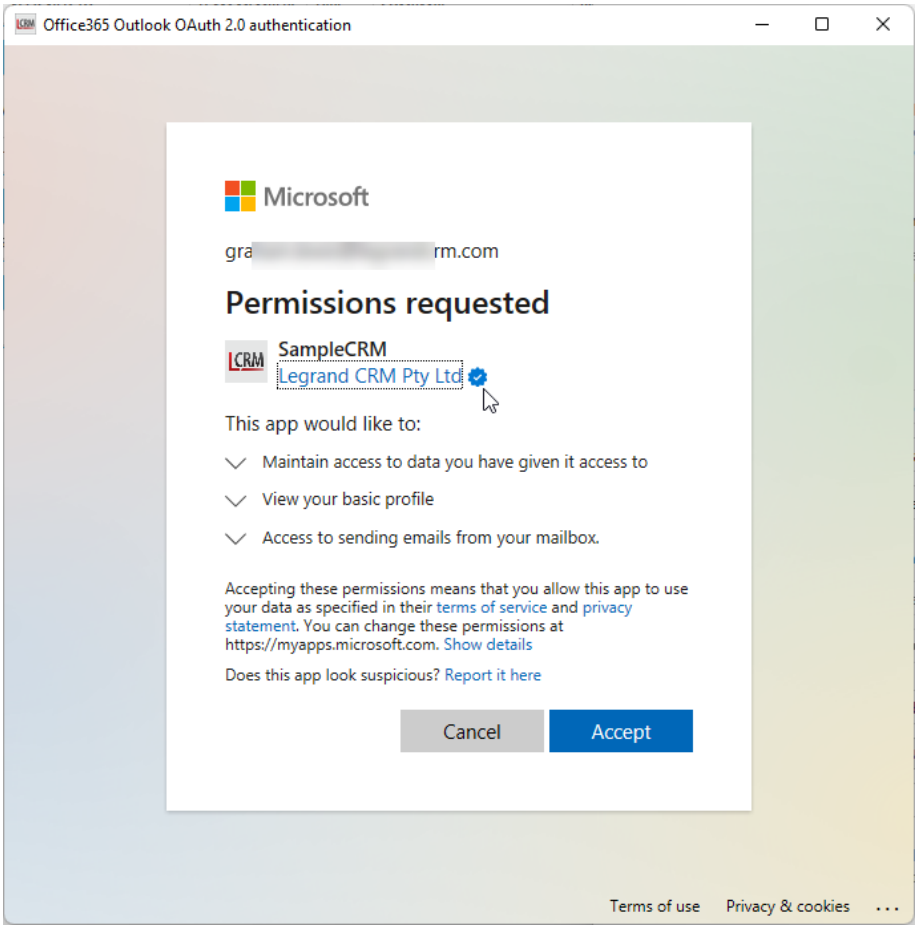
- Click the button and a new pop-up window will appear to authenticate with the mail server. Note that if you are logged in to Microsoft already (e.g. you are running Outlook) then it will show that user as the default choice, but allow you to change to another user if necessary.



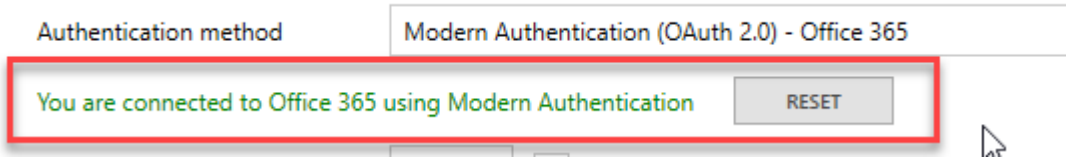
- Enter the user (usually the email address), click Next and enter the password…



- When the sign-in button is clicked complete your 2FA method associated with the account (usually either an SMS to, or via the Authenticator application on, your phone)
- Once 2FA is completed, you may see a screen confirming the Legrand CRM application is allowed to access the mail service, if so please accept (it will only appear if this is the first time you have used OAuth 2.0 to connect Legrand CRM to mail).



- After completing authentication the Mail Settings window will show a confirmation message…



A reset button is provided to clear the existing connection in the event that changes are need to the mail settings.

- Click Save and the process is complete.

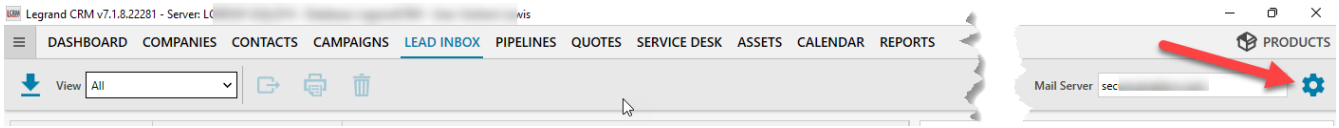
Optional: Converting your Lead Inbox and Service Desk Inbox to OAuth 2.0

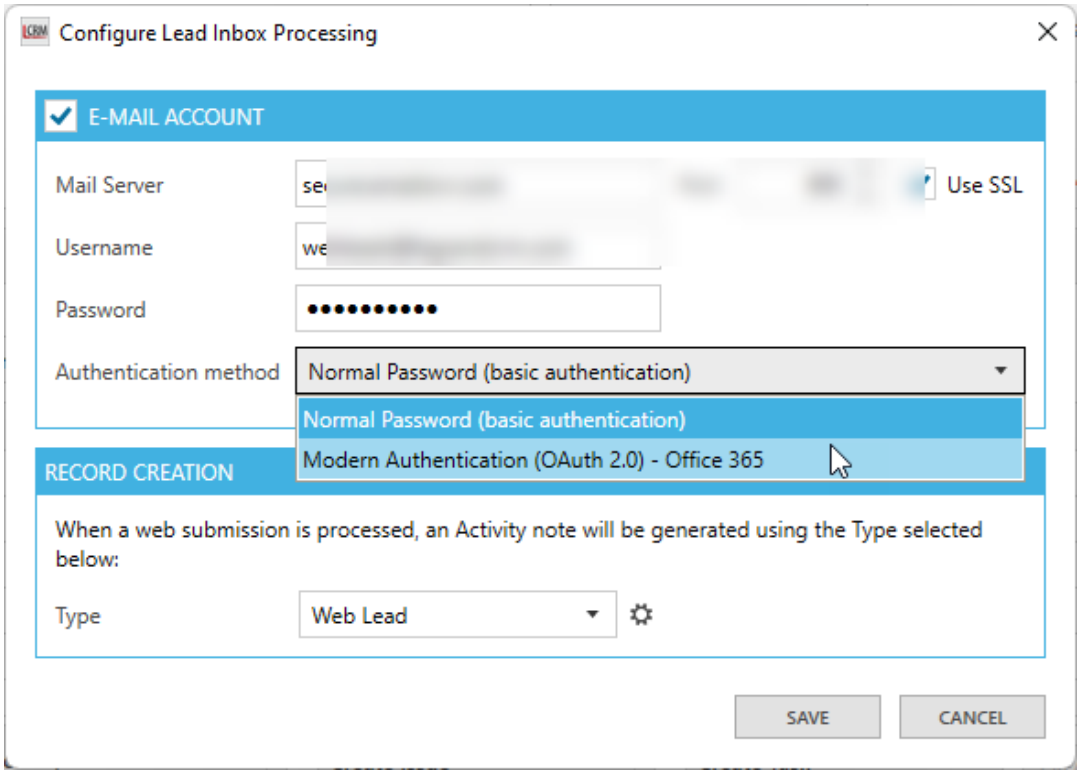
OAuth 2.0 has also been implemented for the mail retrieval functions in the optional Lead Inbox and Service Desk Inbox modules of Legrand CRM. The process for implementation is very similar to that for the outgoing mail; both the settings windows offer a choice between basic authentication and OAuth 2.0, when OAuth 2.0 is chosen a sign-in process is required to confirm the connection.

Important note: both Lead Inbox and Service Desk Inbox email retrieval will empty the mailbox specified on the server, the mailbox is usually a generic mailbox such as sales@mycompany.com or support@mycompany.com. Do **not** specify your personal email as the retrieval email. You only need to adjust either of these settings if email retrieval is already configured.

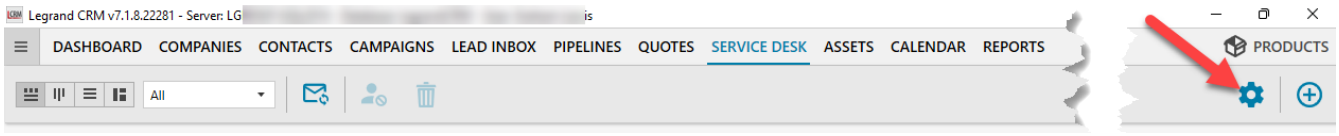
The settings for the two modules are accessed via their respective 'gear wheel' icons.

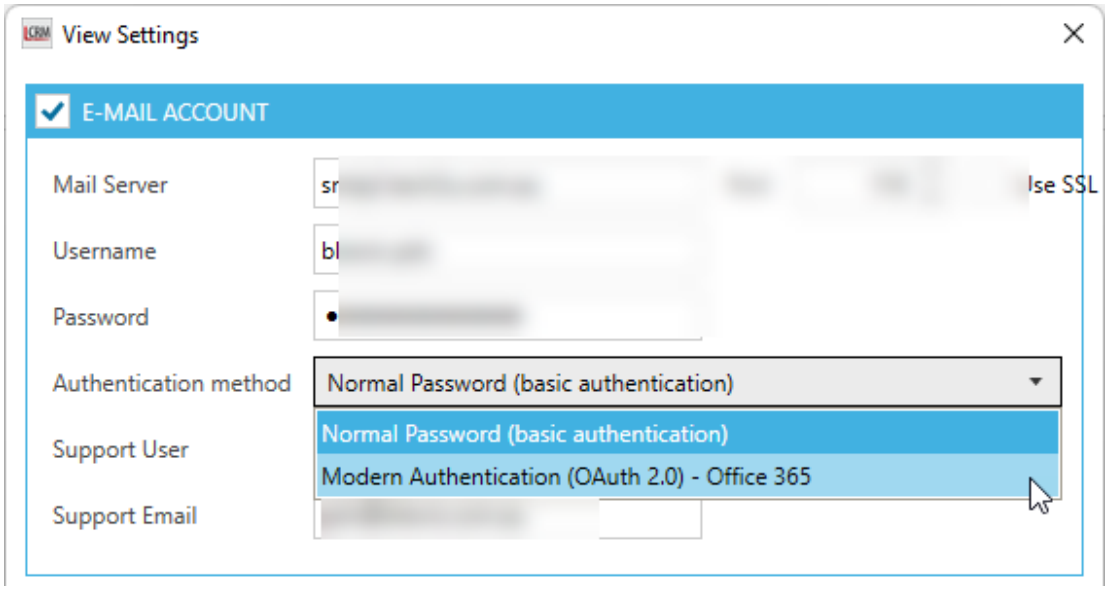
Lead Inbox





Service Desk





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