

## CRM.Web 15.24.0

Release Notes, April 15th, 2025



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## **Overview of Aurea CRM.Web** 15.24.0 release

Aurea is happy to announce and provide the release version 15.24.0, which provides an improvement and fixes a few issues for CRM.Web.

- Release version: CRM.Web 15.24.0
- Release date: April 15th, 2025

## Modules and configurations in this release

This is the list of CRM modules:

- Web
- Win
- Designer
- Web Offline
- Launcher
- Exchange Connector
- Domino Connector
- Universal Connector
- Interface
- Connect Live
- Phone
- Web Services
- WSC
- Office Add-In
- Templates
- Cockpit

## Aurea global support

If you encounter a problem while using an Aurea product or require assistance downloading the software or upgrading a product release, please open a ticket on Aurea Support Central. Preferably, search the articles on the Aurea Knowledge Base for solutions to your issues before opening a ticket.

Information about the support organization is available on Support Central. The product documentation is available at https://help.aurea.com/crm/#.

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, contact us through our website

## Changes in this release

## **List of New Features**

- SMTP with OAuth 2.0 for Office 365 Online
  - Aurea CRM currently uses Basic Authentication for SMTP email functionality in its win/core module. Microsoft is retiring Basic Auth for SMTP in September 2025, requiring a transition to OAuth 2.0. The system's email functionality is critical for customer communications, activity tracking, and document sharing.
  - Starting from version 15.24, ACRM supports OAUTH 2.0 for SMTP authentication (win and web)
    - Detailed instructions to enable OAUTH in ACRM(link)

## About Aurea CRM

Aurea CRM is a CRM suite of products from Aurea.

Customer Relationship Management (CRM) is a strategic decision by your enterprise to tailor your business processes to meet your clients' needs. Aurea CRM is a comprehensive and flexible CRM software solution. It is optimally suited to your enterprise if you require short project durations, sector-specific business processes, and a modern system architecture paired with tried and tested functionality.

Our business solutions cater to the demands of businesses of all sizes, providing services to both small departments and multinational corporations. All marketing, sales and service processes are depicted in the system, helping you provide your clients with a comprehensive CRM experience–from the initial contact with a client to offering optimal support and targeted services.

Aurea CRM can be deployed without any programming knowledge and configured to meet your internal processes. This in turn improves your planning options, accelerates implementation, and helps you recoup your return on investment quickly.

For more information about Aurea CRM, see the **product documentation** and the knowledge base on **Aurea Support Central**. While planning for an installation or upgrade of Aurea CRM, refer to the system requirements.

For any upgrade or purchase inquiries, please consult your account executive.

## System requirements

For system requirements, refer to the Aurea CRM System Requirements guide.

## Appendix

# ACRM Setup Guide: SMTP with OAuth 2.0 for Office 365

Last updated: April 14, 2025 - Aurea CRM Version 15.24

### Overview

Microsoft will retire **Basic Authentication for Exchange Online SMTP** on **October 1st, 2025**. After that, applications — including ACRM — will need to use modern authentication to continue sending email through Office 365.

ACRM supports three methods for sending email:

- **MAPI:** Launches the user's desktop email client (e.g., Outlook) with a pre-filled message. The user sends it manually.
- Exchange Web Services (EWS): Used to sync emails and contacts, optionally calendar entries. Also supports email sending in ACRM Web. *This functionality is not affected by the change.*
- SMTP:
  - **Basic Auth:** Still supported for on-prem or third-party SMTP servers. Will stop working with **Exchange Online** after the deadline.
  - **OAuth 2.0 (client credentials):** Required for Exchange Online. Supported starting in **Aurea CRM 15.24**.

This guide walks through how to configure SMTP with OAuth 2.0 to ensure uninterrupted email delivery in Office 365 environments.

## **Before You Begin**

Ensure you have:

- Aurea CRM version 15.24 or newer, required for OAuth2 SMTP support.
- At least one licensed Exchange Online mailbox for sending emails.
- Administrative access to Microsoft Entra (Azure AD) for app registration.
- SMTP enabled in Aurea CRM (instead of MAPI). Enable via: Rights Module → Configuration → General Settings → E-mail Client → SMTP.

👜 update.CRM win - Rights - Super U	ser - [Configuration]		
🕕 File Edit View Data Info	Extras Window Help		
Opdate	0000		
<u>CRM Process Configuration</u>	Configuration		II 🚅 8
🚂 Login role	Category Gene	ral Settings	
	Option E-ma	l Client	
🕞 User Tracking	ID	Stat. No.	
	Type Value	(text) Station	
<u>Session Tracking</u>	Active	Rep	
+ · · · ·	Numeric	Rep Group	
Process Tracking	Do not use entry		
Log - Read	Default Value		
	Description Defin	es the e-mail client	
W Log - Write			
	-		
Onfiguration	Value SMTF		
🖤 <u>Y</u> ariable			

## Choosing the Right SMTP OAuth Setup

Scenario	CRM Web	CRM Win	Pros	Cons
Single sender for all users(recommend ed for CRM Win)	X Not supported. The sender is always the logged-in user.	Supported by copying a configured smtp.cfg to the system folder.	Simple setup and minimal permissions (CRM Win only)	Not possible in CRM Web.
Multiple senders (per-user)	Default behavior — uses logged-in user's mailbox.	Default behavior. The SMTP settings screen saves smtp.cfg in the user's folder.	Emails are sent from each user's own address	Requires mailbox access and setup for each user

## Microsoft Entra (Azure AD) Setup Steps

#### Step 1: Register a New Application in Azure AD

- Go to Microsoft Entra.

м	icrosoft Entra admin center	ې م	earch resources, services, and docs (G+/)
<b>^</b>	Home What's new		Home > App registrations * ···
×	Diagnose & solve problems		- New registration 🖶 Endpoints 🛪 Troubleshoot 🔾 Refresh 👱 Download 🐼 Preview features   📯 Got feedback?
*	Favorites	$\sim$	Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure Active Directory and security updates but we will no longer provide feature updates. Applications will need to be upgraded to Microsoft Authentication Library (MS)
۵	Identity	$^{\sim}$	
i	Overview		All applications Owned applications Deleted applications
8	Users	$\sim$	P Start typing a display name or application (client) ID to filter these r
<sup>ቀ</sup> ድ <sup>ቀ</sup>	Groups	$\sim$	
£	Devices	$\sim$	This account isn't listed as an owner of any applications in this directory. View all applications in the directory
₿,	Applications	$\sim$	
	Enterprise applications		
	App registrations		

- Click New registration.
- •
- On the **Register an application** page, fill in the following details:
  - **Name**: Enter a name for your application.
  - Supported account types: Choose one:
    - Single Tenant
    - Multitenant
  - Redirect URL: Change the dropdown to Public client (mobile & desktop) and set the value to urn:ietf:wg:oauth:2.0:oob
- Click Register.

м	icrosoft Entra admin center	Search resources, services, and docs (G+/)	ב [
	Home	Home > App registrations > Register an application > App registrations > ACRM exchange > App registrations >	
-	What's new	Register an application	
×	Diagnose & solve problems	* Name	
*	Favorites	The user-facing display name for this application (this can be changed later).	2
4	Identity	ACTION Exchange	<u> </u>
i	Overview	Supported account types	
8	Users	Who can use this application or access this API?  Output: Application or access this API?  Output: Application or access the A	
<sup>ቀ</sup> ድ <sup>8</sup>	Groups	Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)	
£	Devices	<ul> <li>Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)</li> </ul>	
₩ <b>6</b>	Applications	Personal Microsoft accounts only	
	Enterprise applications	Help me choose	
	App registrations	Redirect URI (optional)	
≙	Protection	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.	ł
٤	Identity Governance	Public client/native (mobile )     urn:ietf:wg:oauth:2.0:oob	
Ę	External Identities		
2	Learn & support	By proceeding, you agree to the Microsoft Platform Policies 🗗	
		Register WorkSmart	

#### • Save Application Details

- On the next page, copy the **Application (client) ID** and **Directory (tenant) ID**. Save these for later use.
- You can access this information anytime via: Identity  $\rightarrow$  Applications  $\rightarrow$  App Registrations  $\rightarrow$  All Applications.

Microsoft Entra admin center	© Search resources, services, and docs (G+/)
☆ Home ✓ What's new	Home > App registrations > Register an application > App registrations > ACRM exchange > App registrations > Register an application >         App registrations       *         ····       ×
Diagnose & solve problems	+ New registration 🕀 Endpoints 🛠 Troubleshoot 🖒 Refresh 🞍 Download 🖾 Preview features   🖓 Got feedback?
★ Favorites	Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure Active Directory Graph. We will continue to provide technical support and security updates but we will no longer provide feature updates. Applications will need to be upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph. Learn more
Identity	
Overview	All applications Owned applications Deleted applications
A Users	Start typing a display name or application (client) ID to filter these r
ීද Groups	1 applications found
E Devices	✓ Display name ↑↓ Application (client) ID Created on ↑↓ Certificates & secrets
Applications	ACRM exchange e849dd6a-0cb3-45ef-9d3b-0f135545a52e 11/18/2024 O Current
Enterprise applications	
App registrations	



#### Step 2: Assign API Permissions

• Go to API permissions  $\rightarrow$  Add a permission.



- Go to the APIs my organization uses tab.
- Search for and select **Office 365 Exchange Online**. (This option will appear only if the account has an active Office 365 subscription with Exchange.)

Home > App registrations > ACRM exchange		Request API permissions ×
<sub></sub>	Pl per	
		Select an API
♀ Search «	🕐 Ref	Microsoft APIs APIs my organization uses My APIs
Overview	🛕 g	Apps in your directory that expose APIs are shown below
🍊 Quickstart	al	
💉 Integration assistant		V office
X Diagnose and solve problems	Tł aj	Name Application (client) ID
•••		Office 365 Enterprise Insights f9d02341-e7aa-456d-926d-4a0ca599fbee
Manage		Office 365 Exchange Online 00000002-0000-0ff1-ce00-00000000000
😑 Branding & properties	Configu	-

- Search for Application permissions -> SMTP.SendAsApp
- Click Add permissions.

ACRM exchange	API per	Request API permissions	×
		K All APIs	
	💍 Ref	Office 365 Exchange Online https://outlook.office.com	
Overview	🛕 G	What type of permissions does your application require?	
🗳 Quickstart	ai	Delegated permissions	
💉 Integration assistant		Your application needs to access the API as the	
X Diagnose and solve problems	Th ap	signed-in user.	
Manage		Application permissions	
Branding & properties	Configu	Your application runs as a background service or daemon without a signed-in user.	
Authentication	Applicati permissio		
Certificates & secrets	+ Adı	Select permissions	expand all
Token configuration		₽ smtp	×
→ API permissions	API / P	Permission	Admin consent required
Expose an API	V Mic	✓ SMTP (1)	
L App roles	_		
A Owners	√ Off	SMTP.SendAsApp ① Application access for sending emails via SMTP AUTH	Yes
Roles and administrators	_	· Tr	
0 Manifest	_		
Support + Troubleshooting	_		
New support request			

• Grant admin consent by selecting **Grant admin consent for** and confirming the consent dialog.

Home > App registrations > Register ar	n application > App registrations > ACRM exchange > App registrations > Register an application > App registrations > ACRM exchange	je
	PI permissions 🖈 …	$\times$
✓ Search «	O Refresh   🖗 Got feedback?	
Sverview	A You are editing permission(s) to your application, users will have to consent even if they've already done so previously.	
🍊 Quickstart		
💉 Integration assistant		
X Diagnose and solve problems	A Granting tenant-wide consent may revoke permissions that have already been granted tenant-wide for that application. Permissions that users have already granted on their own behalf aren't affected. Learn more	×
Manage		
Branding & properties	The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or	×
Authentication	app. This column may not reliect the value in your organization, or in organizations where this app will be used. <u>team more</u>	
📍 Certificates & secrets	Configured permissions	
Token configuration	Applications are authorized to call APIs when they are granted nermissions by users (admins as part of the concent process. The list of configured	
->- API permissions	permissions should include all the permissions the application needs. Learn more about permissions and consent	
Expose an API	+ Add a permission 🗸 Grant admin consent for CoyoteIndigo	
12 App roles	API / Permissions name Type Description Admin consent req Status	
2 Owners	V Office 365 Exchange Onlir	•••
Poles and administrators		

#### Step 3: Generate a Client Secret

- Go to Certificates & Secrets  $\rightarrow$  New client secret.
- Enter description, choose expiration, and click Add.
- Immediately copy and securely store the **Client Secret**.
  - IMPORTANT: Copy the value of the client secret and save it. Once you close this screen, you won't be able to access it again. If lost, you will need to create a new client secret.

Home > App registrations > Register an application > App registrations > ACRM exchange > App registrations > Register an application > App registrations > ACRM exchange							
<b>• ACRM exchange</b>   Certificates & secrets → ····							
✓ Search «	₽ Got feedback?						
Overview							
🏜 Quickstart	Credentials enable confidential applications to identify themselves to the authentication service when receiving tokens at a web addressable location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a credential.						
🚀 Integration assistant							
🗙 Diagnose and solve problems	Application registration certificates, secrets and federated credentials can be found in the tabs below.	×					
Manage	• • • • • • • • • • • • • • • • • • •						
Branding & properties	Certificates (0) Client secrets (1) Federated credentials (0)						
Authentication							
📍 Certificates & secrets	A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.						
Token configuration	+ New client secret						

#### Step 4: Register the Service Principal with Exchange Online

The above steps enable the application to use the Exchange Online API. To grant access to specific mailboxes:

Use Microsoft 365 Cloud Shell (or Exchange Online PowerShell):

011	set							
Сс	onnect-Exch	nangeOnline						
		-						
$\leftrightarrow$ $\rightarrow$	ල බ 😄 admin.exchang	ge.microsoft.com/#/adminRoles				☆		1
III Exch	hange admin center	Search (Preview)		D	Q	ŵ		A
=		🗋 Copy role group 📋 Delete	1 selected $ imes$ $\begin{tabular}{c} \label{eq:loss} \end{tabular}$	Search			] =	
☆ Home		Role group $$	Description					
X Recipi	eents ^		settings.					
Ividitor	oxes	Insider Risk Management Investigators	Investigators of insider risk management that can triage alerts, investigate and action on cases as well as explore content.					
Group	DS							

Retrieve the Application Object ID

- $\circ$  Go to Azure  $\rightarrow$  Enterprise applications and locate your application.
- Copy the **Application ID**.
- Copy the **Object ID**.



#### **Create the Service Principal (if required)**

The Application ID should sync automatically to Exchange Online as a Service Principal. However, in some cases, delays or issues with synchronization may prevent it from being recognized. If the commands below (Add-MailboxPermission) fails with an error like "**Couldn't find a service principal with the following identity**" create the service principal using this command:

```
Unset
New-ServicePrincipal -AppId <Application-ID> -ObjectId <Object-ID>
```

Replace <Application-ID> with the **Application ID** and <Object-ID> with the **Object ID**. This step ensures the Service Principal is properly registered with Exchange Online.

#### Step 5: Assign Mailbox Permissions (Critical Step)

• Single sender: Assign permission to system mailbox:

```
Unset
Add-MailboxPermission -Identity
"mail_address_to_send_from_acrm@yourdomain.com" `
-User "<App Object-ID>" -AccessRights FullAccess
```

Multiple user senders:
 Assign permission to each mailbox individually:

```
Unset

$mailboxes = @("user1@yourdomain.com", "user2@yourdomain.com") # Add

users

foreach ($mbx in $mailboxes) {

   Add-MailboxPermission -Identity $mbx `

   -User "<App Object-ID>" -AccessRights FullAccess

}
```

### **Enable SMTP AUTH for Mailboxes**

SMTP AUTH must be enabled on each mailbox you intend to send mail from using OAuth 2.0 with Exchange Online. This step is required even if you've granted mailbox permissions to the app registration.

#### **Microsoft 365 Admin Center Steps**

- 1. Go to Microsoft 365 Admin Center
- 2. Navigate to Users  $\rightarrow$  Active users
- 3. Click the user whose mailbox will send emails
- 4. In the user flyout, select the Mail tab
- 5. Under Email apps, click Manage email apps
- 6. Ensure the checkbox for "Authenticated SMTP" is checked
  - a. If Authenticated SMTP is disabled, email delivery via SMTP will silently fail.

÷	← → C ⋒ the admin.microsoft.com/#/users						
	Microsoft 365 admin cent	ter	✓ Search			Q (2) Q	🐼 ? 🕠
=			Home > Active users			🕗 Enab	le Dark mode
ŵ	Home		Active users				
•	Copilot						
8	Users	^	Decomposited antiput (1)				
	Active users		Recommended actions (1)				~
	Contacts						
	Guest users		🞗 Add a user 🔋 User templates 💡	🗚 Add multiple users 🛛 🔒 Multi-factor authenticat	ion 🞗 Delete a user 💍 Refresh	ho  Search active users list	
	Deleted users						
<sup>6</sup> 2 <sup>4</sup>	Teams & groups	$\sim$	Display name ↑	Username	Licenses		To Choose columns
ĉ	Marketplace		Jorge Arevalo	JorgeArevalo@CoyoteIndigo24.onm	icrosoft.com Exchange Online (Plar	1), Microsoft 365 Business	
	Billing	$\sim$			Standard		





## Aurea CRM Win32 (Desktop App) SMTP Setup

#### Step-by-Step Configuration:

- 1. Launch Aurea CRM mmba module and hold the SHIFT key while selecting File  $\rightarrow$  E-mail.
- 2. In the dialog, choose authentication: AUTH\_OAUTH2 (Exchange Online).
- 3. Fill the OAuth details from Azure:
  - o Client ID in the Entra Admin panel, Enterprise Applications is the field Application ID
  - **Tenant ID** visible in the Entra Admin in basic information
  - Client Secret
  - Scope: https://outlook.office365.com/.default
  - Authority: https://login.microsoftonline.com
  - SMTP Host: smtp.office365.com
  - Port: 587
  - Enable SSL checked.
- 4. Check "Store credentials" to save your settings.

Opdate       Image: Image							rt Page] Extras Window Help	🥣 update.CRM win - Super User - [Star 🕕 File Edit View Data Info E
▲ Start Page       You are logged in: Super User         ▲ Eavorites       ✓         ▲ Eavorites       ✓       ✓       ✓         ▲ Eavorites       ✓       ✓       ✓       ✓       ✓         ▲ Eavorites       Appointrent Planning       ✓       ✓							0000000000	<b>O</b> pdate
You are logged in: Super User         E Favorites       Connection Settings         My update.CRM       E accrites         Person       Companies and Persons       User         G person       Companies and Persons       User         Search Denson       Search Company.       Search Company.         B gesources       Appointment Planning       Search Cannad         B calendar       Search Calendar       Authentication       AUTH_CAUTH2(Exchange Online)       Authentication         Marketing       Connection       Server / JP:       smp.office365.com       Validate OAuth Configuration         Validate OAuth Configuration       Validate OAuth Configuration       Validate OAuth Configuration         Marketing       Search Denson       Search Denson       Search Denson       Authentication         Marketing       Connection       Server / JP:       smp.office365.com       Validate OAuth Configuration         Validate OAuth Configuration       Validate OAuth Configuration       Validate OAuth Configuration         Validate OAuth Configuration       Validate OAuth Configuration       Validate OAuth Configuration         Marketing       Sales       Server / JP:       smp.office365.com       Validate OAuth Configuration         Validate OAuth Configuration       Valida							🟠 Start Page	∽ General
E gavorites       My update.CRM         Image: Company + Person       My update.CRM         Image: Companies and Persons       Sender         Image: Companies and Persons       Sender         Image: Companies and Persons       Search Companies and Persons         Image: Companies and Persons       Search Companies and Persons         Image: Companies and Persons       Search Companies and Persons         Image: Companies and Persons       Search Companies         Image: Companies and Persons       Search Companies         Image: Companies and Persons       Search Person         Image: Companies and Persons       Search Companies         Image: Companies and Persons       Search Companies         Image: Companies and Persons       Search Person						User	You are logged in: Super	🟠 Start Page
Image: Company + Person       Wy update: CRM         Image: Companies and Persons       User         Image: Companies and Persons       Sender         Image: Companies and Persons       User name:         Image: Companies and Persons       Appointment Planning         Image: Companies and Persons       Authentication         Image: Companies and Persons       Comection         Im	×					Connection Settings		<b>★</b> ≡ <u>F</u> avorites
Image: Person       Companies and Persons       Sender       Jorge Arevalo (ACRM new)       Client Secret:       Ender       Ender       Ender<			OAuth Configuration			User	My update.CRM <b>*</b> Eavorites	Company+Person
Search Company       Search Company       E-mail:       JorgeArevale@CoyoteIndigo24.ommicrosoft.co       Client D:       e049dd5e-0dx345ef-9d3b-0f1355455         Resources       Appointment Planning       Bassword:       User name:       Image: Company       dic/958e6-5a45-41ce-8a3a-6f58073at         Societion       Sig Calendar       Password:       Authentication       Authentication       Authentication       Scope:       https://outlook.office365.com/.default         Selection       Marketing       Connection       Server / IP:       smp.office365.com       Authority:       https://outlook.office365.com         Marketing Activity       Sales       Server / IP:       smp.office365.com       Validate OAuth Configuration         Marketing Calendar       Sales Preline       Format:       TEXT       Validate OAuth Configuration	000000000000000000000000000000000000000	Ekn8Q~ZmtBXXXXXXXXXXXXXXXXXXXXXX	Client Secret:	CRM new)	Jorge Arevalo (Ar	Sender	Companies and Persons	Person
	545a52e	e849dd6a-0cb3}45ef-9d3b-0f135545	Client ID:	oyoteIndigo24.onmicrosoft.co	JorgeArevalo@Co	E-mail:	Search Company Search Person	Calendar
In Pool     If Resource Calendar     method	fault	https://outlook.office365.com/.defau	Scope:	xchange Online)		Password: Authentication	Appointment Planning	<u>Resources</u> <u>Daily Overview</u>
Selection       Image: Server / IP: Image: Server / Image: Server		https://login.microsoftonline.com	Authority:	,		Connection	Marketing	<u>ў</u> То-Do
Image: Solution of the second sec		alidate OAuth Configuration	v	om	smtp.office365.c	Server / IP:	Campaigns Marketing Calendar	Selection
Sales Pipeline     Priority:     Normal				SSL Flags	587	SMTP port:	Sales	Marketing Activity
				× ×	Normal	Format: Priority:	Sales Pipeline	Marketing Calendar
Service     Store credentials       Property     Tickets						Store credentials	Service	Property
S Dpportunity Overview OK Cancel				OK Cancel				<b>Opportunity Overview</b>

This creates a file:

```
Unset
<installation>\update.win\<ACRM username>\smtp.cfg
```

To apply settings to all users, copy this file to:

```
Unset
```

<installation>\update.win\system\smtp.cfg

#### \rm Important:

• If a user-specific smtp.cfg exists in their folder

(<install>\update.win\<username>\smtp.cfg), it will override the system-wide
configuration.

- This allows that user to send emails using their own address in the **From** field.
- Remember: Hold SHIFT to access the SMTP settings screen.



You can also configure SMTP from the **Rights** module, assigning different configurations per **station**, **rep**, or **rep group**.

#### Steps:

- 1. Open the **Rights** module.
- 2. Go to: Configuration  $\rightarrow$  General Settings  $\rightarrow$  Connection Settings for SMTP
- 3. Click Add/edit value.
- 4. The SMTP settings dialog will open.
- 5. Select AUTH\_OAUTH2 (Exchange Online) as the authentication method.
- 6. Adjust any fields as needed and click **OK**.
- 7. Repeat for each rep, station, or group as required.

This setup creates a separate config entry for each selection

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### Aurea CRM Web - SMTP Setup

To enable SMTP with OAuth2 in **Aurea CRM Web**, your web.config file must include the custom <oauthMailSettings> section. This enables secure, token-based email sending via Office 365.

#### If you're upgrading an existing installation:

Update web.config to include:

```
Unset
<configuration>
<configSections>
<section name="oauthMailSettings"
type="update.Crm.Emails.MailSettingsSection, update.Crm"/>
</configSections>
```

```
<oauthMailSettings>
  <smtp deliveryMethod="Network">
    <network
      host="smtp.office365.com"
      port="587"
      defaultCredentials="false"
      enableSsl="true" />
    <oauth
      clientId="YOUR_CLIENT_ID"
      clientSecret="YOUR_CLIENT_SECRET"
      tenant="YOUR_TENANT_ID"
      scope="https://outlook.office365.com/.default"
      authority="https://login.microsoftonline.com" />
 </smtp>
</oauthMailSettings>
<system.web>
 <httpRuntime targetFramework="4.8" requestValidationMode="4.0" />
</system.web>
```

```
</configuration>
```



#### 1 Important Notes:

• If both <oauthMailSettings> and <system.net><mailSettings> are present, OAuth2 will be used.

The legacy Basic Auth config is ignored unless the OAuth section is missing.

- Make sure targetFramework is set to **4.8**. Older installations often default to 4.5, which is **not compatible** with the OAuth implementation.
- Default sender is the logged-in user's email. The email address if taken from the **REP** info area

### **Behavior Differences: Basic Auth vs OAuth2**

Aspect	SMTP with Basic Auth	SMTP with OAuth2 (client credentials)
Authentication method	Username + password	Access token via client ID + secret
Supported platforms	CRM Win, CRM Web	CRM Win 15.24+, CRM Web 15.24+
Sender in CRM Win	Defined in smtp.cfg (system or per-user)	Same — defined in smtp.cfg
Sender in CRM Web	Logged-in user	Logged-in user
Config location (CRM Win)	smtp.cfg,mm.ini	<pre>smtp.cfg (same mechanism)</pre>
Config location (CRM Web)	<mailsettings> <b>in</b> web.config</mailsettings>	<oauthmailsettings> in web.config</oauthmailsettings>
Per-user override (CRM Win)	Yes — user-specific smtp.cfg	Yes — user-specific smtp.cfg
System-wide config (CRM Win)	Yes — shared smtp.cfg in update.win/system	Same — shared smtp.cfg in update.win/system
MAPI support	Still available (separate feature)	Still available (unchanged)
EWS module	Available for sync and CRM Web email	Same — functionality remains unchanged
Credential storage	Password stored encrypted	Client secret stored encrypted (same mechanism)

## **Troubleshooting Common Issues**

Issue	Solution
OAuth - Configuration - Errors	Check Azure permissions (SMTP.SendAsApp) Confirm app registration - Ensure correct Tenant ID, Client ID, and Client Secret
Token - expiration/failures -	Tokens expire ~1 hour; they're auto-refreshed on send Check firewall/proxy settings blocking outbound requests Verify system clock is correct
Email sending fails - (unauthorized) -	Confirm mailbox access with Add-MailboxPermission Double-check the App Object ID used in the command
Old config still - active -	Remove <system.net><mailsettings> from web.config Ensure the correct oauthMailSettings section is present In CRM Win, make sure the smtp.cfg in the <b>system</b> folder doesn't override your new config</mailsettings></system.net>
SMTP settings not - saving (CRM Win)	Ensure <b>Store credentials</b> is checked in the Connection Settings screen
Validation fails in - CRM Win -	Use <b>Validate OAuth Configuration</b> button - Confirm correct values in OAuth fields Check for clipboard copy/paste errors (e.g. extra spaces)
CRM Web doesn't - start -	Make sure web.config has the <configsections> entry for oauthMailSettings Remove invalid/partial config sections - Test locally on the same machine to bypass network routing issues</configsections>
Email silently fails	Check update.win/system/db/u8_base_ <user>.log (CRM Win) Check update.web/web.data/log/web.log (CRM Web) Look for SMTP or token errors</user>

## **References & Further Reading**

- Exchange Online to retire Basic auth for Client Submission (SMTP AUTH) | Microsoft Community Hub
- <u>Microsoft announcement: SMTP OAuth client credentials flow</u>
- Enable or disable SMTP AUTH in Exchange Online | Microsoft Learn
- Aurea CRM Documentation: <u>Sending Emails via SMTP</u>