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TBD: Microsoft Outlook 365 anbinden

https://www.odoo.com/documentation/15.0/administration/maintain/azure_oauth.html

Um in Smartbrix sichere E-Mails von einer kundenspezifischen Domain zu senden und zu empfangen, sind ein paar Einstellungen vorzunehmen.

Fetchmail Outlook installieren

Microsoft Outlook installieren

Einrichtung im Microsoft Azure Portal

- Gehen Sie zu Microsoft's Azure Portal: https://portal.azure.com/

- Loggen Sie sich mit Ihrem Microsoft Outlook Office 365 oder persönlichem Microsoft Account ein.

- Navigiere zur Sektion "Verzeichnis verwalten"

- Klicken Sie auf Hinzufügen (+) und wählen Sie "App registrieren"

- den Namen umbenennen in "Smartbrix"

- Unter "unterstütze Kontotypen" wählen Sie "Konten in einem beliebigen Organisationsverzeichnis! (Any Azure AD directory - Multitenant)" UND persönliche Microsoft Konten (z.B. Skype, Xbox)

- Unter "URL Weiterleitung" wählen Sie "Web" als Plattform und fügen im Feld URL folgendes ein: https://<smtb base url>/microsoft_outlook/confirm

- Die smtb base url ist die Domain Ihrer Smartbrix Datebank smtb base url = mydatabase.smtb.io

- Danach klicken Sie auf "Registrieren"

API permissions

- The API permissions should be set next. Odoo will need specific API permissions to be able to read (IMAP) and send (IMAP) emails in the Microsoft 365 setup. First, click the API permissions link, located in the left menu bar. Next, click on the (+) Add a Permission button and select Microsoft Graph under Commonly Used Microsoft APIs. After, select the Delegated Permissions option.

- In the search bar, search for the following Deregulated permissions and click Add permissions for each one:

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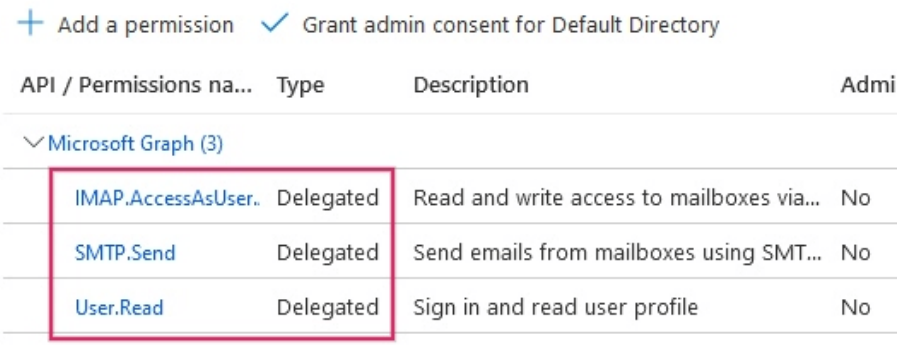
SMTP.Send

IMAP.AccessAsUser.All

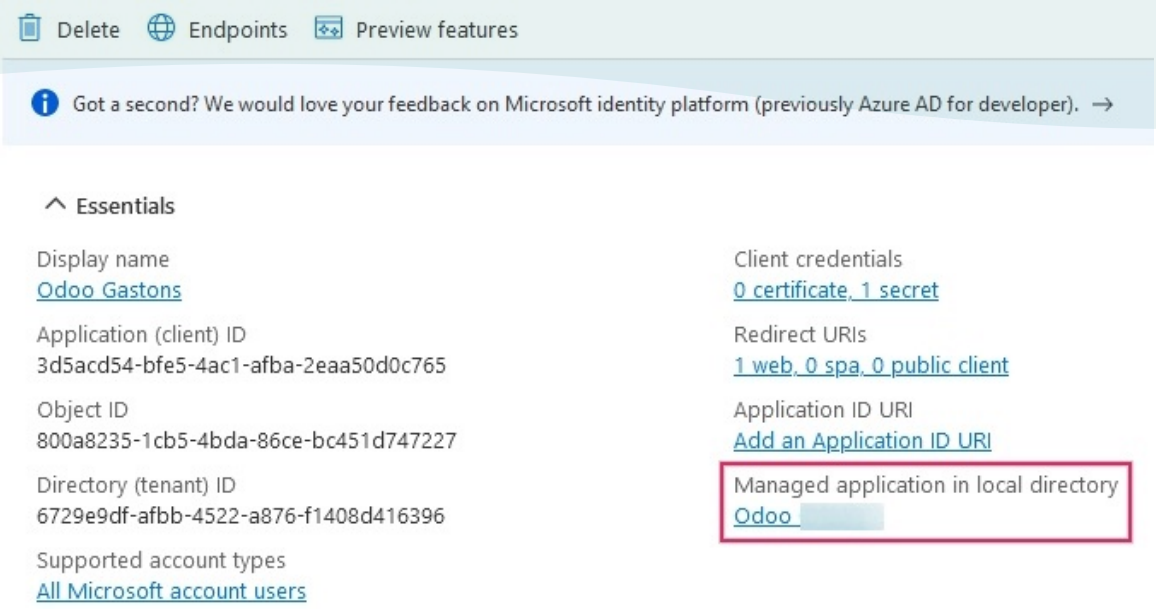


Assign users and groups

- After adding the API permissions, navigate back to the Overview of the Application in the top of the left sidebar menu.

- Now, add users to this application. Under the Essentials overview table, click on the link labeled Managed Application in Local Directory, or the last option on the bottom right-hand side of the table.

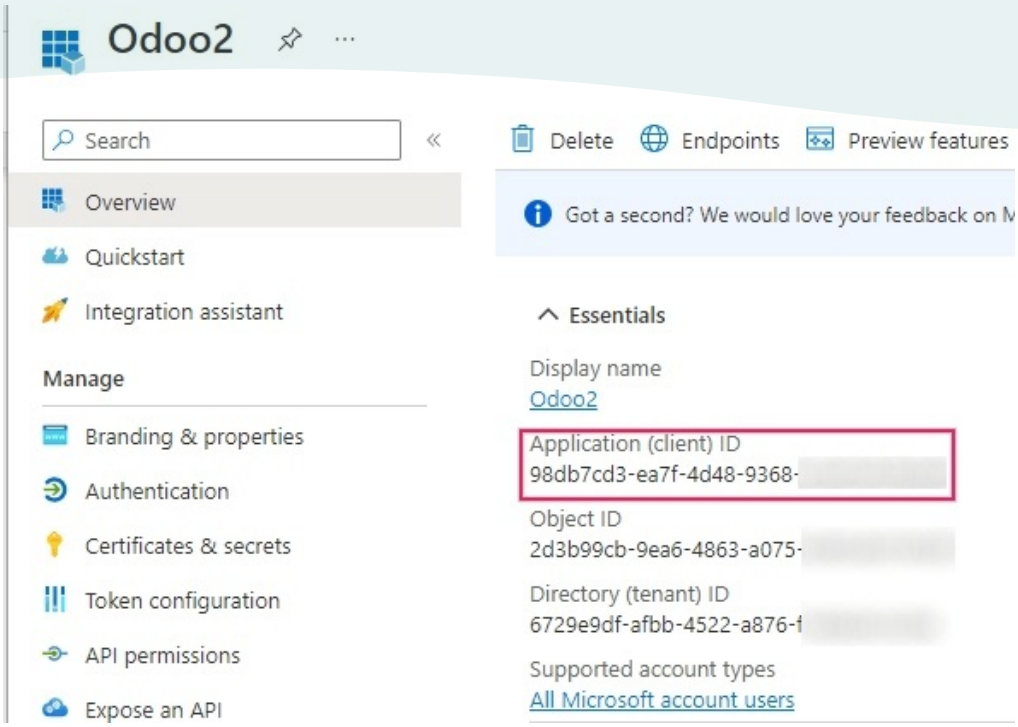
- Add users/groups by clicking the Managed application in local directory link for the created application.
- In the left sidebar menu, select Users and Groups. Next, click on (+) Add User/Group. Depending on the account, either a Group and a User can be added, or only Users. Personal accounts will only allow for Users to be added.



- Under Users or Groups, click on None Selected and add the users or group of users that will be sending emails from the Microsoft account in Odoo. Add the users/groups, click Select, and then Assign them to the application.

Create credentials

- Now that the Microsoft Azure app is set up, credentials need to be created for the Odoo setup. These include the **Client ID** and **Client Secret**. To start, the **Client ID** can be copied from the **Overview** page of the app. The **Client ID** or **Application ID** is located under the **Display Name** in the **Essentials** overview of the app.



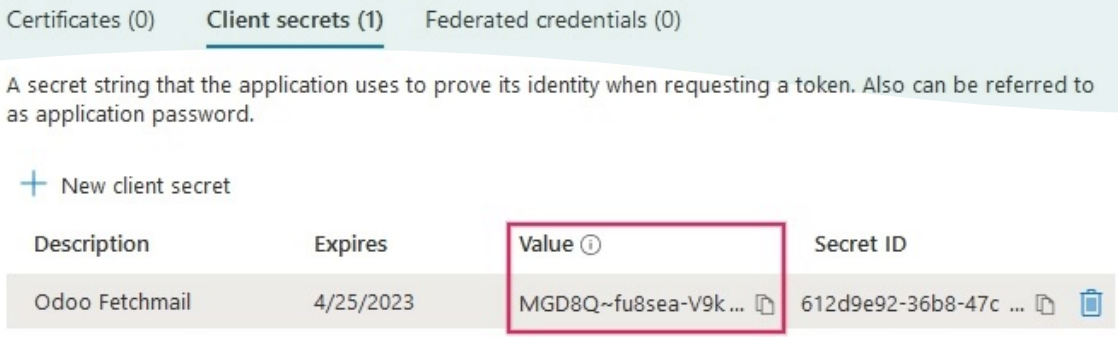
- Next, the Client Secret Value needs to be retrieved. To get this value, click on Certificates & Secrets in the left sidebar menu. Then, a Client Secret needs to be produced. In order to do this, click on the (+) New Client Secret button.

- A window on the right will populate with a button labeled Add a client secret. Under Description, type in Odoo Fetchmail or something recognizable, and then set the expiration date.

Important

A new Client Secret will need to be produced and configured if the first one expires. In this event, there could be an interruption of service, so the expiration date should be noted and set to the furthest possible date.

Next, click on Add when these two values are entered. A Client Secret Value and Secret ID will be created. It is important to copy the Value or Client Secret Value into a notepad as it will become encrypted after leaving this page. The Secret ID is not needed.



- A client ID (Client ID or Application ID)
- A client secret (Value or Client Secret Value)

This completes the setup on the Microsoft Azure Portal side.

After these steps, the following items should be ready to be set up in Odoo:

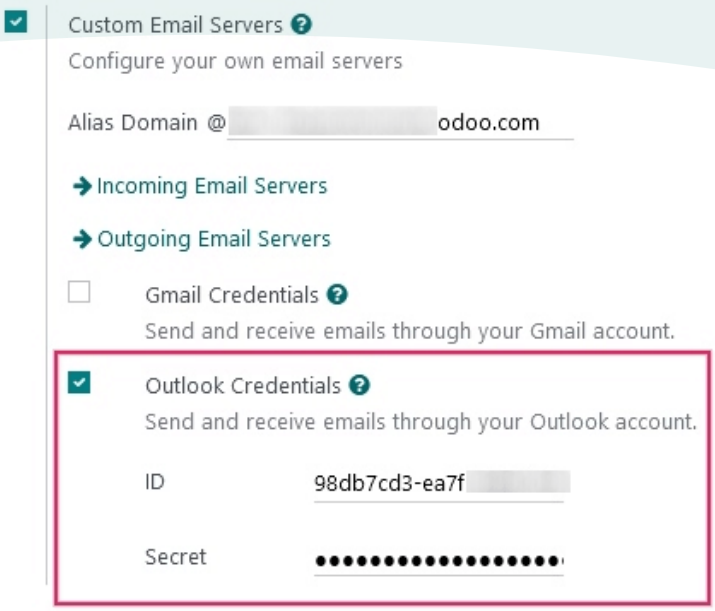
Setup in Odoo

- Enter Microsoft Outlook credentials
- First, open the Odoo database and navigate to the Apps module. Then, remove the Apps filter from the search bar and type in Outlook. After that, install the module called Microsoft Outlook.

- Next, navigate to Settings General Settings, and under the Discuss section, ensure that the checkbox for Custom Email Servers is checked. This populates a new option for Outlook Credentials.

- Save the progress.

- Then, copy and paste the Client ID (Application ID) and Client Secret (Client Secret Value) into the respective fields and Save the settings.



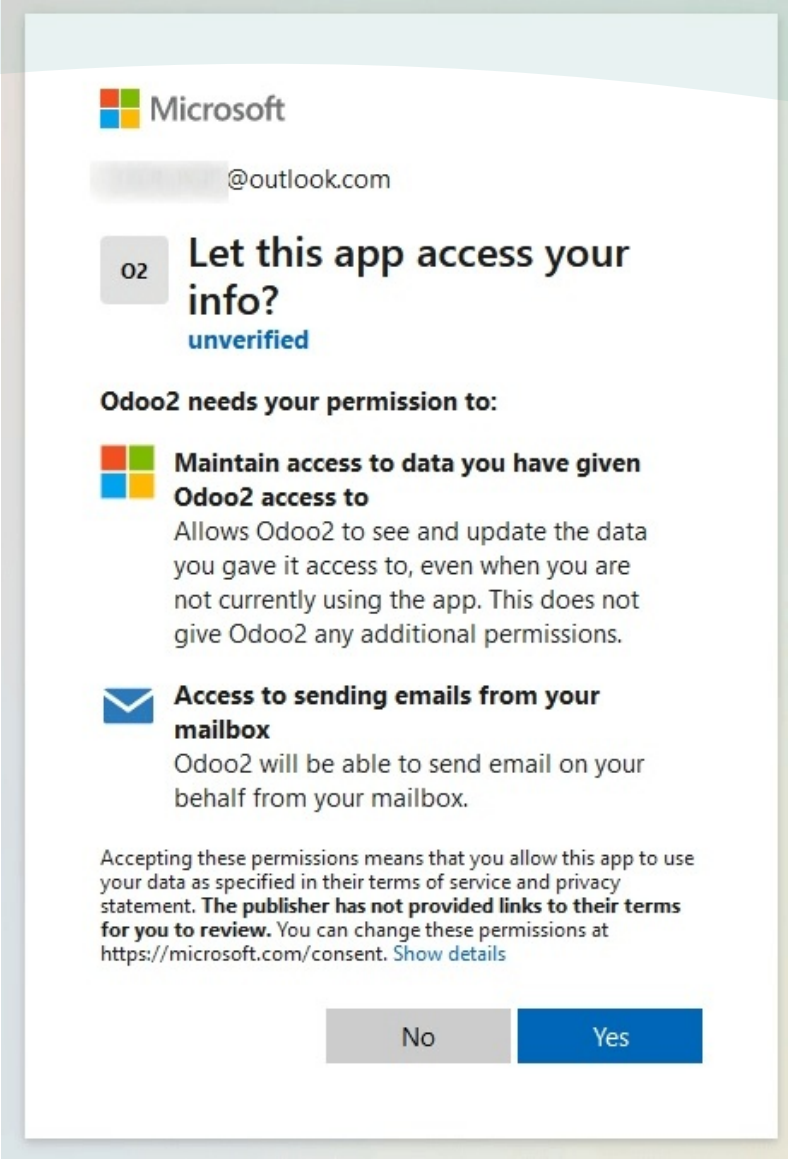
Configure outgoing email server
On the General Settings page, under the Custom Email Servers setting, click the Outgoing Email Servers link to configure the Microsoft account.

Then, create a new email server and check the box for Outlook. Next, fill in the Name (it can be anything) and the Microsoft Outlook email Username.

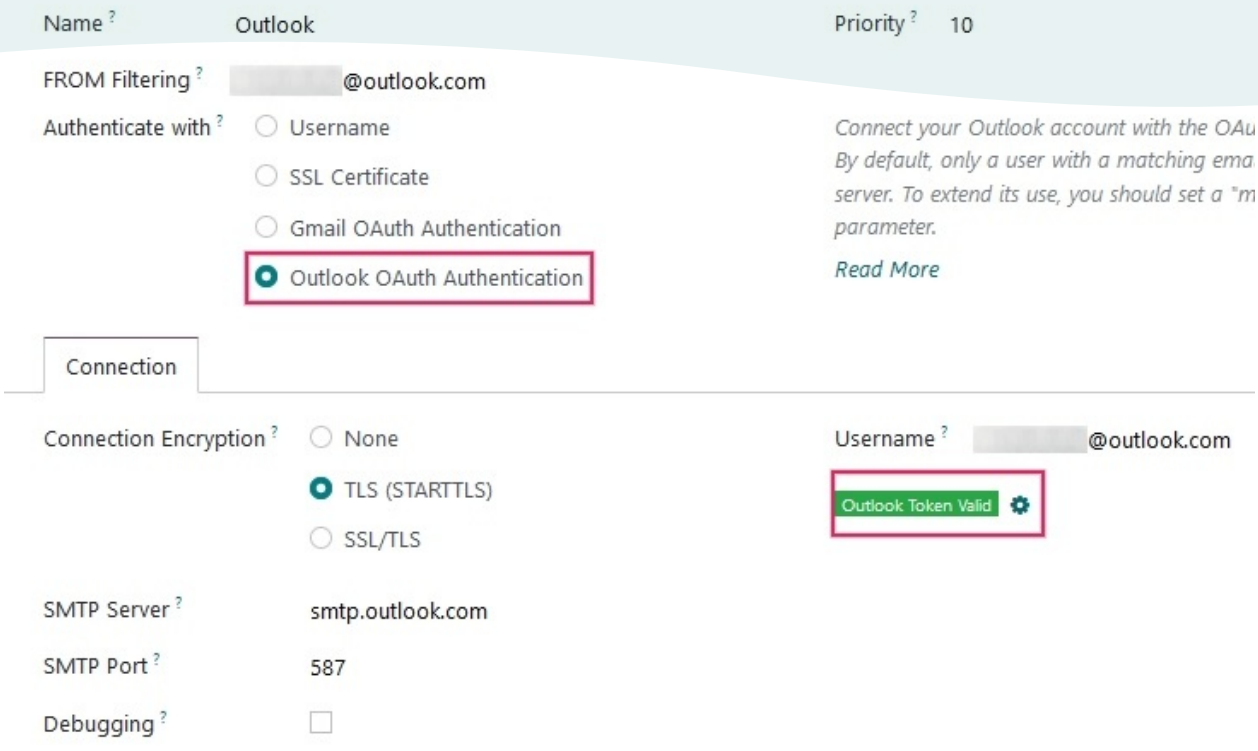
If the From Filter field is empty, enter either a domain or email address.

Then, cick on Connect your Outlook account.

A new window from Microsoft opens to complete the authorization process. Select the appropriate email address that is being configured in Odoo.



Then, allow Odoo to access the Microsoft account by clicking on Yes. After this, the page will navigate back to the newly configured Outgoing Mail Server in Odoo. The configuration automatically loads the token in Odoo, and a tag stating Outlook Token Valid appears in green.



Finally, click Test Connection. A confirmation message should appear. The Odoo database can now send safe, secure emails through Microsoft Outlook using OAuth authentication.

Multiple user configuration
Each user should have a separate server set up. The from-filter should be set so that only the user's email is sent from that server. In other words, only a user with an email address that matches the set from-filter is able to use this server.

After setting the from-filter, set up a fallback email account to allow for the sending of notifications. The fallback email must be configured as a general transactional server. The mail.default.from system parameter must be set to the username of the general transactional server account. For more information see Use a default email address.

Note

The System Parameters can be accessed by activating Developer Mode (debug mode) in the Settings ▯ Technical ▯ Parameters ▯ System Parameters menu.

Configure incoming email server
The incoming account should be configured in a similar way to the outgoing email account. Navigate to the Incoming Mail Servers in the Technical Menu and Create a new configuration. Check or Select the button next to Outlook Oauth

Authentication and enter the Microsoft Outlook username. Click on Connect your Outlook account. Odoo will state: Outlook Token Valid Now Test and Confirm the account. The account should be ready to receive email to the Odoo database.