PropertyIQ™

Mail Server Settings
Microsoft Office 365 / Outlook

CONTENTS

PropertyIQ

What you need to know

- From **1 December 2026**, Microsoft are **permanently disabling** basic authentication for sending emails. You can read more about the Microsoft change and timeline here and here.

- **PropertyIQ requires a valid mail server connection to send emails**. Without this, documents and emails cannot be sent by PropertyIQ when processing jobs for levies, invoices, meeting notices, letters, reports etc.

- Basic email authentication has been the only available option in PropertyIQ until now. There's now **new Office 365 authentication** for outgoing email delivery in PropertyIQ, using Microsoft Graph API integration.

Who's impacted by this change

- You will be impacted if you use **Microsoft Outlook** or **Office365** for your email and have setup Outlook or Office365 as your mail server in PropertyIQ (under Global or Folio settings). If using Outlook or Office365, you'll need to update your PropertyIQ mail server settings. This is to ensure you can keep sending emails from PropertyIQ without any interruptions.

- If you use **Gmail**, you are **not** impacted by this change and do **not** need to take any action.

Summary - What you need to do <u>by 30 November 2026</u>

- If you use **Microsoft Outlook** or **Office365** for your email, you'll need to **update your PropertyIQ mail server settings**. This is to ensure you can keep sending emails from PropertyIQ without any interruptions.

- There are **three steps** you need to take:

  1. Register PropertyIQ in your Microsoft account – setup new application and permissions to send emails. See 'Step 1 – Register PropertyIQ in your Microsoft account' for instructions.

  2. Configure new email settings in Property (using details obtained from Step 1). See 'Step 2 – Configure new email settings in PropertyIQ' for instructions.

  3. Send a test email in PropertyIQ to confirm email delivery is working. See 'Step 3 – Send test email in PropertyIQ' for instructions.

- It's **highly recommended you engage an IT consultant or your internal IT administrator** to read and perform the above actions, as you'll need relevant administrator permissions on your Microsoft account.

IMPORTANT

This document is a guide to assist email administrators that choose to implement the changes required to allow PropertyIQ to connect and deliver email via Graph API, however any decision to make use of this function and changes made to your office 365 account are your responsibility and should be reviewed and agreed to by your email administrator prior to making any changes.

PropertyIQ cannot access or provide any support relating to Office 365, so your administrator MUST be satisfied that the required changes are acceptable and meet your internal security and email management policies.

## Step 1 - Register PropertyIQ in your Microsoft account

! Important notes	• If you are not familiar with your Microsoft account or require more assistance than this guide provides, it's **recommended you engage an IT consultant or your internal IT administrator** to read and perform the actions in this step.
	• You will need to **record important details** as part of Step 1.1, which is then used to complete Step 2.
	• To use Microsoft's new authentication service, you'll be required to create a secret for the PropertyIQ Application in your Microsoft account (refer Item 6 of Step 1.1).
	   ○ This secret has an <u>expiry</u> date, with a maximum period of 24 months.
	   ○ Each time your secret is about to expire, you will need to create a new secret (Step 1.1), then update PropertyIQ mail sever settings with the new secret (Step 2).
	   ○ It's important you record when your secret expires, so you can maintain this on an ongoing basis. **If you don't maintain an active secret in PIQ, your PIQ emails will stop sending.**

👤 **Who needs to action this**	• *Application Owners* or *Administrators* of your Microsoft account.

STEP 1.1 APPLICATION REGISTRATION

1. Navigate & Login to Azure Portal (portal.azure.com). In the search bar, search for "App registrations" and click on it in the dropdown list.
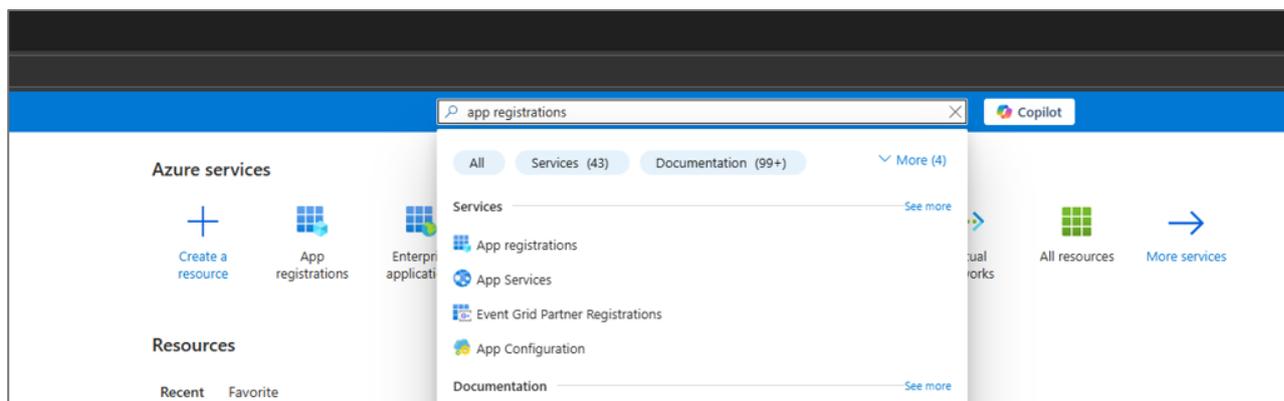

2. Click on 'New registration' and enter the following details:
   a. <u>Name</u>: PropertyIQ
   b. <u>Type</u>: Accounts in this organizational directory only (single-tenant)
   c. <u>Redirect URI</u>: not required
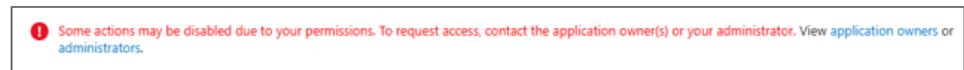3. Click 'Register'
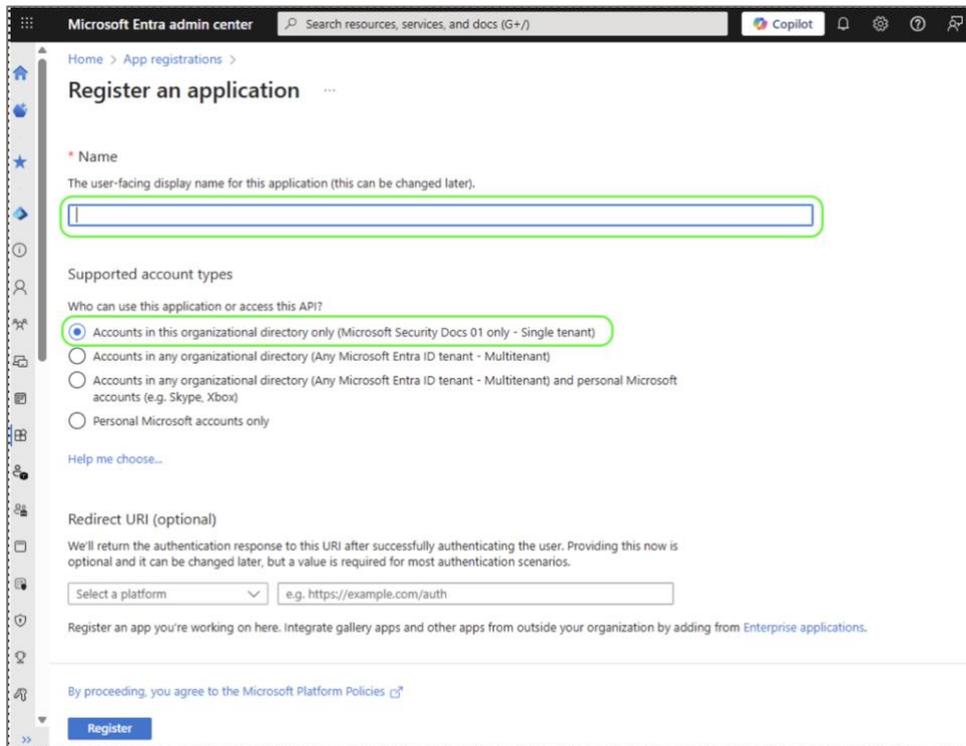
Once the application is registered, it'll take you to the overview screen for the PropertyIQ application.
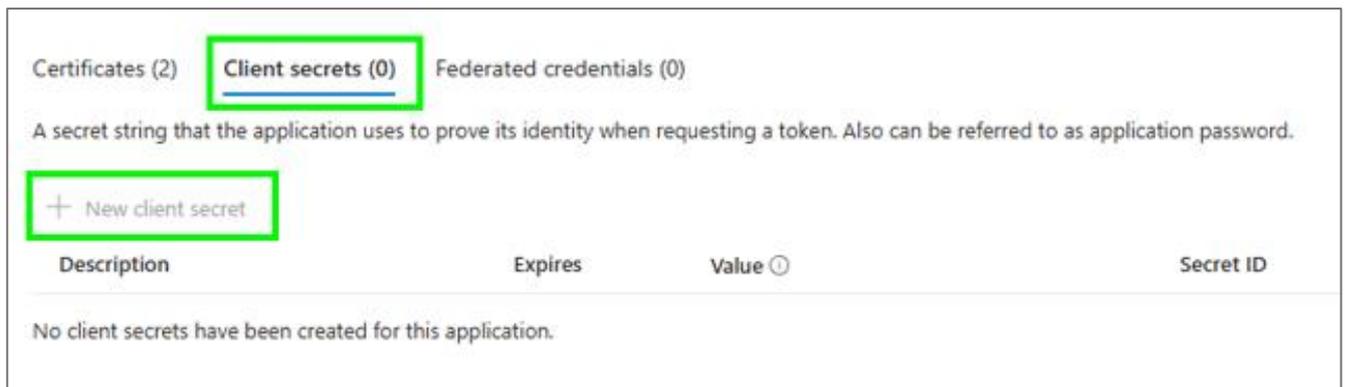Stay on this screen and follow the below steps.

4. In the side menu click 'Manage', then 'Certificates & Secrets'
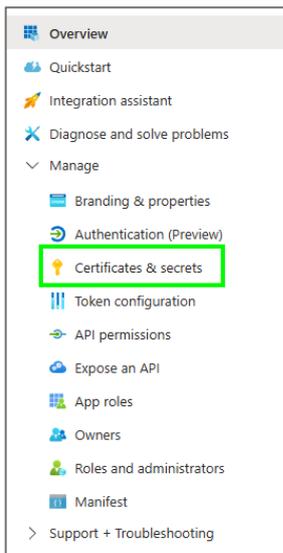
Note: If you dont have permission, you'll see a red alert at the top of the screen. You'll need to contact your Global Administrator to finish the setup.

5. Click on 'Client secrets', then click on 'New client secret'

6. Enter details and click 'Add' to create the secret
   a. Description: Enter a short description
   b. Expires: In the dropdown, you must set the expiry period. It's defaulted to 6 months; you can choose a longer period or a custom date based on your preferences. Make a reminder for the expiry date as you will need to maintain this on an ongoing basis.

> *IMPORTANT:* You will need to re-do this step every time your secret expires.
> Before the secret expires, you will need to create a new one, then update PropertyIQ mail sever settings with the new secret. **If you don't maintain an active secret in PIQ, your PIQ emails will stop sending.**

7. **Copy** and store the secret that displays in the 'Value' column in the table.

> *IMPORTANT:* Do **not** navigate away from screen until you copy it, as you only have one chance to copy it. Once you navigate away from this screen, the secret is hidden and will need to be created again.

8. In the side menu, click on 'Overview'
9. **Copy** the 'Application ID' (Client ID) and the 'Directory ID' (Tenant ID) as per example below.
   a. Save these details in a safe location so that you can retrieve them to complete the remaining steps in this process.
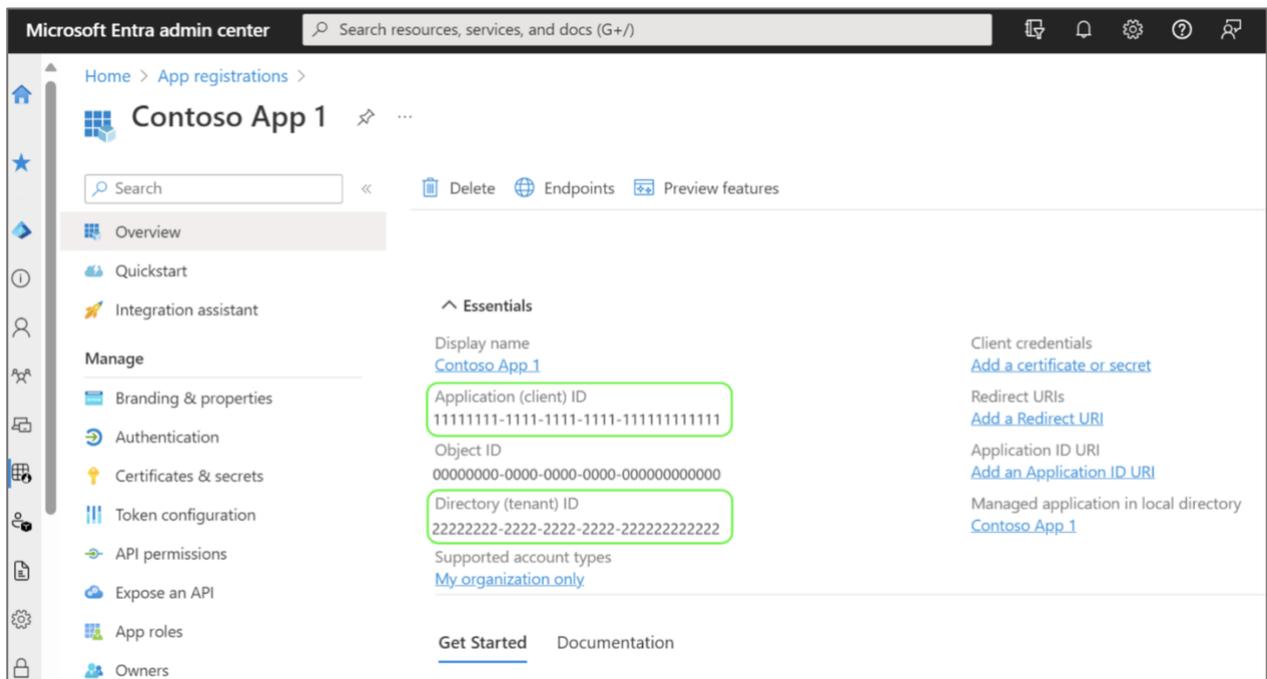
STEP 1.2 API PERMISSIONS

Once your PropertyIQ application is registered, you will need to grant it the "Mail.Send" permission so that PropertyIQ can send emails.

1. From the App registrations page in the Azure Portal, go to the side menu under 'Manage', click 'API permissions'
2. Click on 'Add a permission'
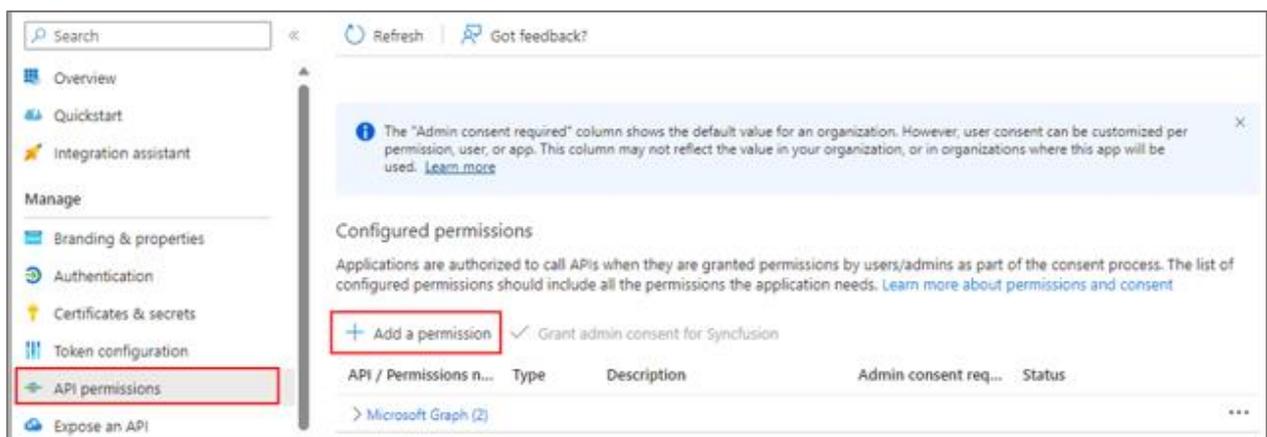
3. On the new permission setup screen, select 'Microsoft Graph'
4. Then select 'Application Permissions' as the type of permission
   a. By selecting 'Application Permissions' it allows emails to be sent by any user in the organisation and grants admin consent.
5. In the search bar, search and select '**Mail.Send**'
6. Then click 'Add Permissions' button to complete the setup.

Your configured permissions should look something like this.

This completes the Office 365 side of preparations.

At this point, you should have:
1. A new "PropertyIQ" Entra application; and
2. Configured the appropriate permissions for sending e-mails.

Step 2 - Configure new email settings in PropertyIQ

You can now configure PropertyIQ to use "Microsoft Graph API" to send outgoing emails.

1. Login to PropertyIQ as an Administrator with permissions to edit settings
2. Go to *Utilities>Settings>Mail Server Settings>Outgoing* tab and click *Edit* to edit the settings.
3. Locate the 'Mail Server' drop down option, change this to "**Microsoft Graph API**"
4. Populate the new authentication fields. To do this, use the values you saved whilst setting up Office 365 in Step 1.1.
   - Client id
   - Client secret
   - Tenant id
   - User identity
5. Click 'Save'

Step 3 - Send test email in PropertyIQ

After setting up your outgoing email settings in Step 2 above, you'll need to send yourself a test email to confirm everything is working.

1. Scroll to the bottom of the screen on *Utilities>Settings>Mail Server Settings>Outgoing* tab
2. Go to 'Test Mail Server Settings' function
3. Enter your email address and click 'Send Test Email'

If you **do** receive a test email from PropertyIQ to the email address you entered, everything is working and the setup is complete!

If you **do not** receive a test email, please check Steps 1 and 2 above, and if necessary, repeat the setup process.