

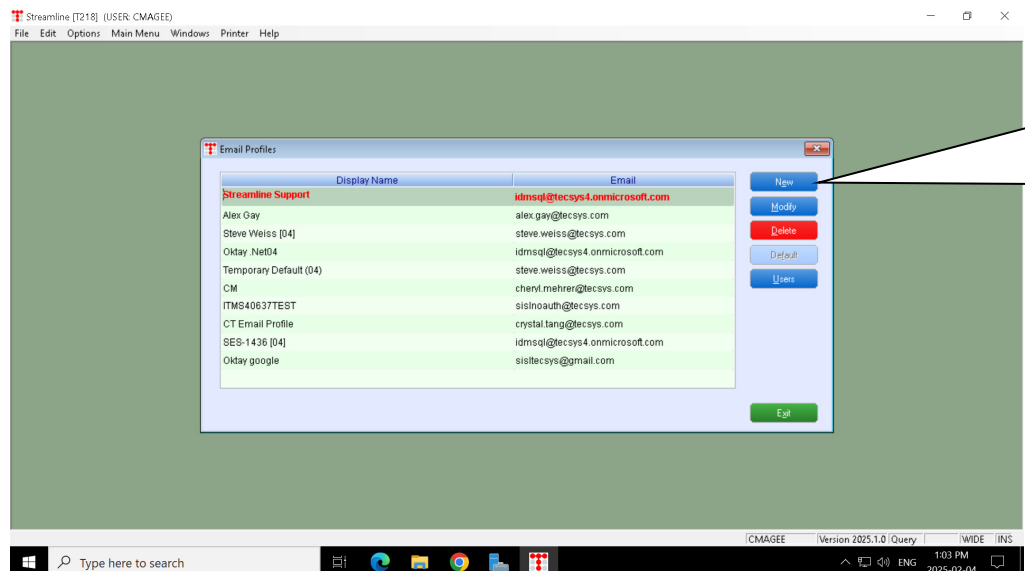
Visual Streamline FAQ

Microsoft 365 is retiring basic SMTP authentication as of September 2025. Going forward OAuth must be setup and used for Microsoft SMTP email accounts.

Prerequisites:

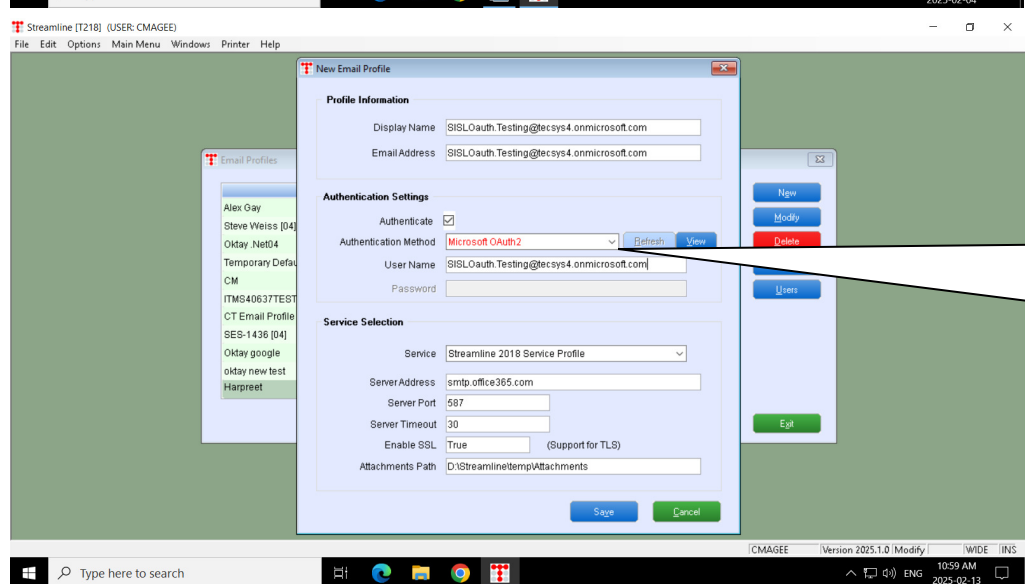
Tecsys support will need to be engaged to setup the Microsoft Oauth Service Profile. This is a one-time setup. Once completed you can continue with the below steps.

Installation -> SMTP Email Setup -> Email Profiles



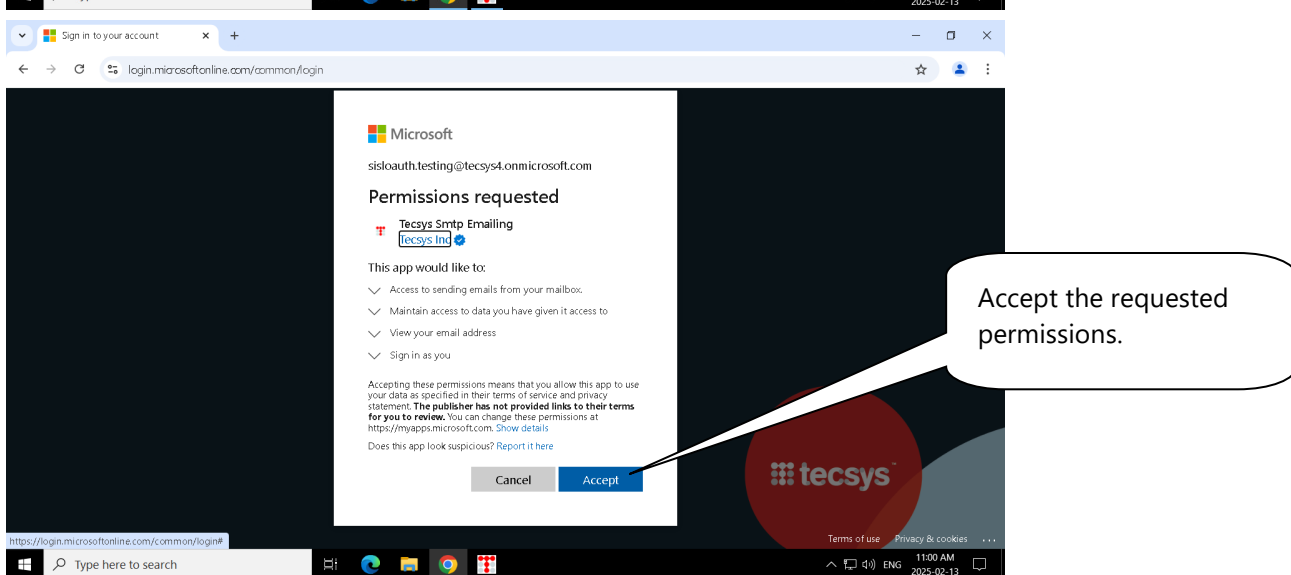
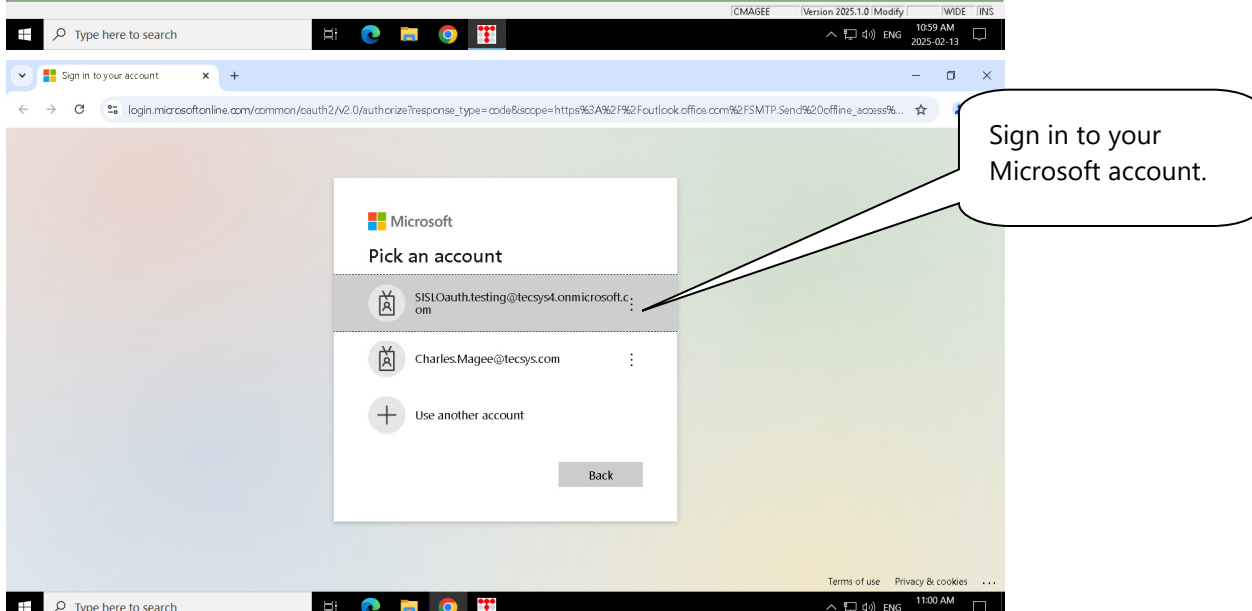
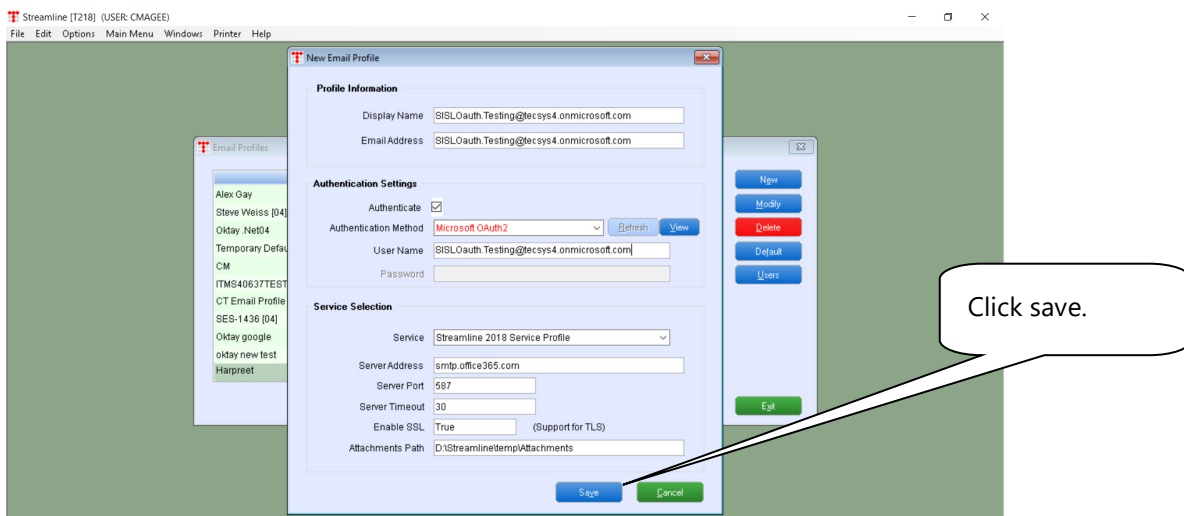
The screenshot shows the 'Email Profiles' window in the Visual Streamline application. It contains a table with columns 'Display Name' and 'Email'. The table lists several profiles, including 'Streamline Support' (idmsql@tecsys4.onmicrosoft.com), 'Alex Gay' (alex.gay@tecsys.com), 'Steve Weiss [04]' (steve.weiss@tecsys.com), 'Okta Net04' (idmsql@tecsys4.onmicrosoft.com), 'Temporary Default (04)' (steve.weiss@tecsys.com), 'CM' (chenyl.mehrer@tecsys.com), 'ITMS40637TEST' (sislnauth@tecsys.com), 'CT Email Profile' (crystal.tang@tecsys.com), 'SES-1436 [04]' (idmsql@tecsys4.onmicrosoft.com), and 'Okta google' (sisl@tecsys@gmail.com). To the right of the table are buttons for 'New', 'Modify', 'Delete', 'Default', and 'Users'. A callout bubble points to the 'New' button.

You can either create a new or modify an existing email profile.



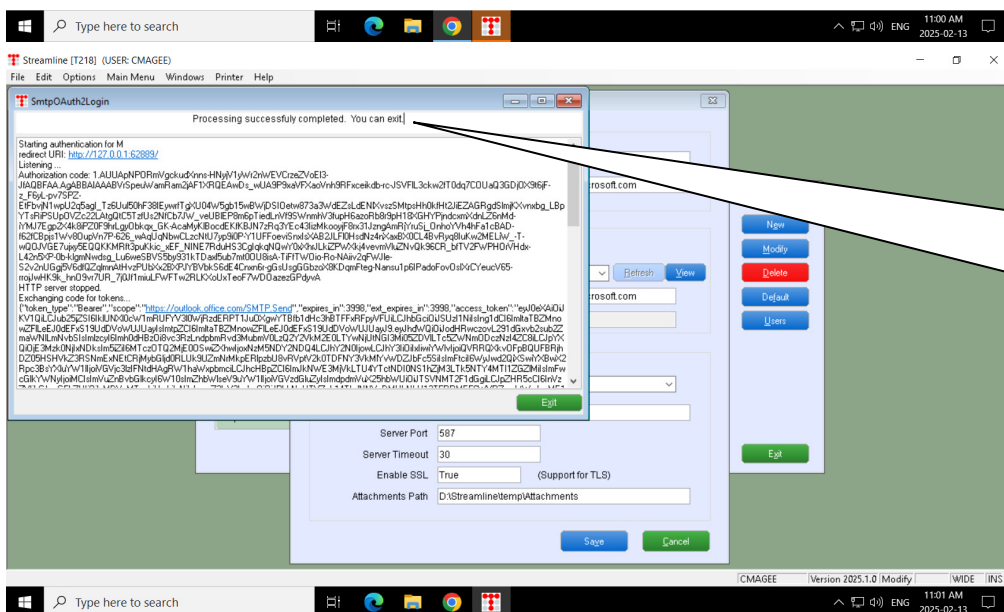
The screenshot shows the 'New Email Profile' window. It has three main sections: 'Profile Information', 'Authentication Settings', and 'Service Selection'. 'Profile Information' has fields for 'Display Name' and 'Email Address', both containing 'SISLOauth.Testing@tecsys4.onmicrosoft.com'. 'Authentication Settings' has a checked 'Authenticate' checkbox, 'Authentication Method' set to 'Microsoft OAuth2', and fields for 'User Name' and 'Password'. 'Service Selection' has a 'Service' dropdown set to 'Streamline 2018 Service Profile', and fields for 'Server Address' (smtp.office365.com), 'Server Port' (587), 'Server Timeout' (30), 'Enable SSL' (True), and 'Attachments Path' (D:\Streamline\temp\Attachments). Buttons for 'New', 'Modify', 'Delete', 'Users', 'Save', and 'Cancel' are visible. A callout bubble points to the 'Authentication Method' dropdown.

Populate the email profile with the correct information and then change the authentication method to Microsoft OAuth2.





You can now close the browser window.



Streamline verified the process completed successfully. You can now exit out of the Email Profile setup window.

Company Setup -> User Maintenance

Streamline (T218) (USER: CMAGEE)

File Edit Options Main Menu Windows Printer Help

Modify User Details

User Number: 218 ☐ Delete User

User ID: CMAGEE ☒ Allow Access to Restricted Suppliers

User Name: Charles Magee

Sales Rep: ☐ Check Only if the user is a Sales Rep

Email Address: charles.magee@tecsys.com Email Profile: charles.magee@tes

Current Company: 04 Streamline Development SQ

Current Printer: None

Disallow P/S Print: ☐ Check this to disallow printing packing slip from Order Entry

Disallow Ship Quantity: ☐ Check this to deny access to Ship Quantity in Order Entry

Buyer Code: Buyer Override: ☒

Warehouse: 421 Torbram Electric Supply - LAN

User Cost Base: Customer Zoom Default:

User Language: English Order Entry Default: Standard Default Customer:

Reporting Filter Options for this User

Sales Rep Code:

Product Lookup Defaults

Stock Types			Status	
☐ Stock Item	☐ Non Stock	☐ Miscellaneous	☐ Active	☐ Obsolete
☐ Assembled Kit	☐ Built To Order Kit	☐ Customer Rsnd Stock	☐ To Be Deleted	☐ Inactive
☐ Special Order Item	☐ Configured Products	☐ Template Products		

CMAGEE Version 2025.1.0 Modify IINS

Type here to search

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Select the email profile you setup in prior steps then click save. The user can now login to Streamline and begin emailing.