

**NAV
TECH
DAYS
2016**

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OFFICE 365 FOR NAV TECHIES

AREND-JAN KAUFFMANN – KAUFFMANN IT SERVICES

WHEN YOU ARE PASSIONATE ABOUT MICROSOFT DYNAMICS NAV | www.navtechdays.com

**NAV
TECH
DAYS
2016**

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Introduction

- Freelance Dynamics NAV Consultant & Trainer
- Experience with Dynamics NAV since 2002
- Using Office365 since 2010
- Microsoft MVP Dynamics NAV
- co-founder & chairman
Dutch Dynamics Community
- blogger
<http://kauffmann.nl>
- contact
Email: aj@kauffmann.nl
Twitter: [@ajkauffmann](https://twitter.com/ajkauffmann)



Why this session?

- Integration between Dynamics NAV and Office 365 is evolving
- Customers expect you to guide them
- You have two options
 - Ask a partner
 - Do it yourself

Do you really want to let a partner take care of the day-to-day needs of end-user?



How does your core map to what your customer really wants?

Setting up O365 for the first time – Getting your tenant

Starting with a trial

Services are based on country

Country will also be used to check the phone number

Office 365 Business Premium Trial

Want to add this to an existing subscription? [Sign in](#)

Welcome, let's get to know you

Netherlands

[This can't be changed after sign-up. Why not?](#)

Arend-Jan Kauffmann

ajkauffmann@outlook.com

+31634868959

NAV Techdays 2016 DEMO

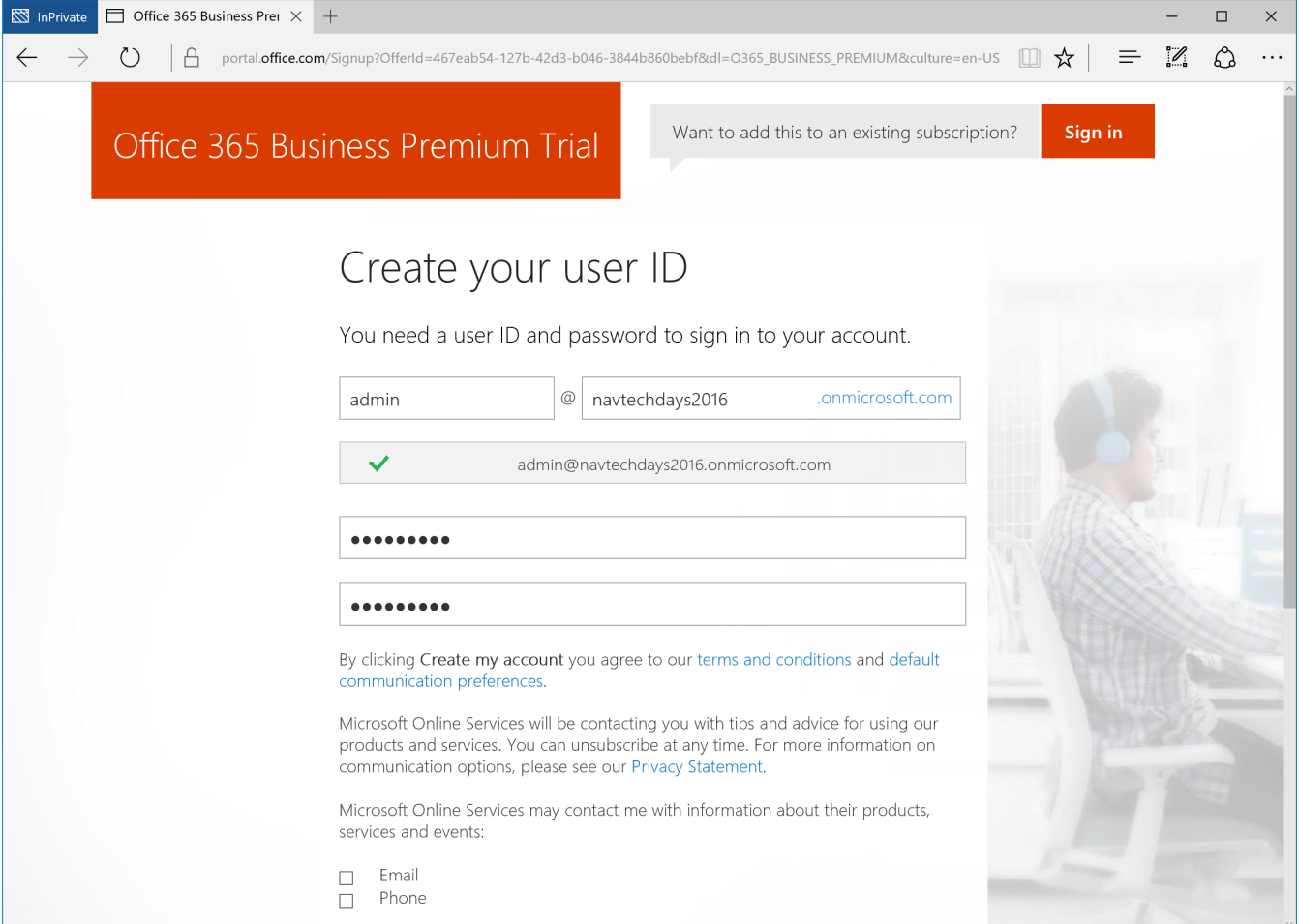
1000+ people

Just one more step ➞

Setting up O365 for the first time – Getting your tenant

Every new O365 tenant uses
.onmicrosoft.com

This can be changed
afterwards



The screenshot shows a web browser window with the URL `portal.office.com/Signup?OfferId=467eab54-127b-42d3-b046-3844b860bebf&dl=O365_BUSINESS_PREMIUM&culture=en-US`. The page features a prominent orange banner at the top that reads "Office 365 Business Premium Trial". To the right of the banner is a grey box with the text "Want to add this to an existing subscription?" and a red "Sign in" button. The main heading is "Create your user ID", followed by the instruction "You need a user ID and password to sign in to your account." The form includes two input fields for the username: the first contains "admin" and the second contains "navtechdays2016" followed by a blue ".onmicrosoft.com" link. Below these is a grey box with a green checkmark and the email address "admin@navtechdays2016.onmicrosoft.com". There are two password input fields, each represented by a series of dots. At the bottom, there is a paragraph of terms and conditions, a checkbox for "Email", and a checkbox for "Phone". On the right side of the page, there is a blurred image of a person wearing a headset and working at a computer.

Office 365 Business Premium Trial

Want to add this to an existing subscription? [Sign in](#)

Create your user ID

You need a user ID and password to sign in to your account.

admin @ navtechdays2016 .onmicrosoft.com

admin@navtechdays2016.onmicrosoft.com

By clicking **Create my account** you agree to our [terms and conditions](#) and [default communication preferences](#).

Microsoft Online Services will be contacting you with tips and advice for using our products and services. You can unsubscribe at any time. For more information on communication options, please see our [Privacy Statement](#).

Microsoft Online Services may contact me with information about their products, services and events:

☐ Email
☐ Phone

Setting up O365 for the first time – Getting your tenant

The phone number format must match the country

Office 365 Business Premium Trial

Want to add this to an existing subscription? [Sign in](#)

Prove. You're. Not. A. Robot.

☒ Text me ☐ Call me

(+1)

[Text me →](#)

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Setting up O365 for the first time – Getting your tenant

Your O365 is ready to launch!

The screenshot shows the Microsoft Office 365 portal landing page. The browser address bar shows the URL: office.com/1/?auth=2&home=1&from=PortalLanding&trial=1&client-request-id=8ece7032-0142-42fb-a937-ad634daf51e5. The page header includes the Office 365 logo, a notification bell, a settings gear, a help question mark, and the user's name "Arend-Jan Kauffmann". A blue banner at the top says "Good morning, Arend-Jan". To the right of the banner is a button labeled "Install software". Below the banner, there is a section titled "Use the online apps" with three icons: "Security & Compliance", "Store", and "Admin". A modal window titled "Install software" is open, showing the text "Get the familiar desktop apps on your PC and Mac." and a "Next" button. At the bottom of the page, there is a URL bar showing <https://portal.office.com/OLS/MySoftware.aspx?source=ohp-ib> and a "Feedback" button.

Setting up O365 for the first time – Initial setup

The Admin center guides you through the initial setup

First step is to add the domain

It's free to stay with the onmicrosoft.com domain

The screenshot shows the Microsoft Office Admin center setup wizard in a web browser. The browser tabs include 'InPrivate', 'Microsoft Office Home', and 'Office Admin center - S'. The address bar shows 'portal.office.com/adminportal/home#/setupwizard'. The navigation bar has 'Office 365' and 'Admin center' tabs, along with a user profile 'Arend-Jan Kauffmann'. The setup wizard progress bar shows four steps: Step 1 (Personalize sign-in, active), Step 2 (Add users), Step 3 (Get apps), and Step 4 (Connect domain). The main content area is titled 'Personalize your sign-in and email' and includes a subtext: 'The domain you choose will become the part of your email address that comes after the @ symbol. You and your staff will use it to sign in and it's how customers will send you email.' There are two radio button options: 'Connect a domain you already own.' (selected) and 'Continue using navtechdays2016.onmicrosoft.com for email and signing in.' The first option has a text input field containing 'navtechdays2016.com' and a link 'What's a domain and why do you need one?'. The second option has a link 'Why would you use this domain?'. At the bottom, there is a 'Next' button with a right arrow and a link 'Exit and continue later'. A 'Feedback' button is located in the bottom right corner.

Office 365 Admin center

Step 1 Personalize sign-in

Step 2 Add users

Step 3 Get apps

Step 4 Connect domain

Personalize your sign-in and email

The domain you choose will become the part of your email address that comes after the @ symbol. You and your staff will use it to sign in and it's how customers will send you email.

☒ Connect a domain you already own.

navtechdays2016.com

[What's a domain and why do you need one?](#)

☐ Continue using navtechdays2016.onmicrosoft.com for email and signing in.

[Why would you use this domain?](#)

Next [Exit and continue later](#)

Feedback

Setting up O365 for the first time – Initial setup

Now it's getting more technical...

You need access to the DNS settings of the domain

The screenshot shows the Microsoft Office Admin center setup wizard in a web browser. The browser tabs include 'InPrivate', 'Microsoft Office Home', and 'Office Admin center - S'. The address bar shows 'portal.office.com/adminportal/home#/setupwizard'. The navigation bar includes 'Office 365' and 'Admin center'. The setup wizard progress bar shows four steps: Step 1 (Personalize sign-in), Step 2 (Add users), Step 3 (Get apps), and Step 4 (Connect domain). Step 1 is currently active, indicated by a red dot. The main content area is titled 'Verify domain' and contains the following text: 'To verify that you own this domain, add this DNS record to your domain (only the domain owner can do this). Don't worry, adding this record won't affect your existing email or other services and it can safely be removed at the end of setup. Follow these [step-by-step instructions](#) to create a new DNS record using the values below at your registrar, your DNS host. ([Select your registrar.](#))' Below this, there are three fields: 'TXT name:' with a value of '@ or skip if not supported by provider.', 'TXT value:' with a value of 'MS=ms26372555', and 'TTL:' with a value of '3600 or your provider default.' At the bottom, there is a link 'Or, add an MX record to verify ownership instead.' and a 'Back' link. The 'Verify' button is highlighted in red with a circular arrow icon, and there is an 'Exit and continue later' link. A 'Feedback' button is located in the bottom right corner.

Office 365

Step 1
Personalize sign-in

Step 2
Add users

Step 3
Get apps

Step 4
Connect domain

Verify domain

To verify that you own this domain, add this DNS record to your domain (only the domain owner can do this). Don't worry, adding this record won't affect your existing email or other services and it can safely be removed at the end of setup. Follow these [step-by-step instructions](#) to create a new DNS record using the values below at your registrar, your DNS host. ([Select your registrar.](#))

TXT name: @ or skip if not supported by provider.

TXT value: MS=ms26372555

TTL: 3600 or your provider default.

[Or, add an MX record to verify ownership instead.](#)

[Back](#) **Verify** [Exit and continue later](#)

[Feedback](#)

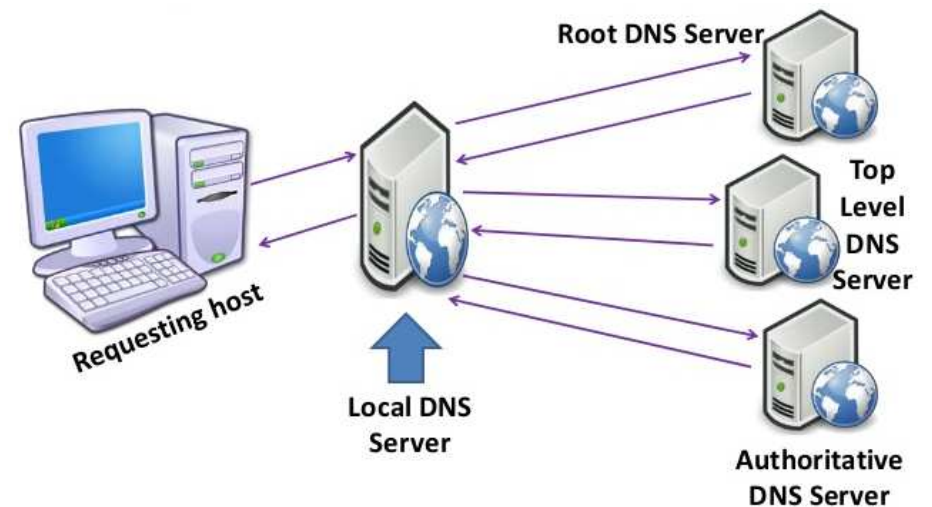
What is DNS?

DNS stands for Domain Name System

Hierarchical naming system for domain systems

Translates internet host names to IP addresses

Think of it as the address book of internet



Setting up O365 for the first time – Initial setup

Now it's getting more technical...

You need access to the DNS settings of the domain

So you create the correct DNS entry

Records Edit				
« < 1/1 > » 250 ▼ Filters				
Name ▼	Type ▼	Content ▼	Priority ▼	TTL ▼
navtechdays2016.com	NS	ns1.openprovider.nl		1 day
navtechdays2016.com	NS	ns2.openprovider.be		1 day
navtechdays2016.com	NS	ns3.openprovider.eu		1 day
navtechdays2016.com	SOA	ns1.openprovider.nl dns@openprovider.eu 2016111702		1 day
navtechdays2016.com	TXT	MS=ms26372555		1 hour

Setting up O365 for the first time – Initial setup

Now it's getting more technical...

You need access to the DNS settings of the domain

So you create the correct DNS entry

And hit the Verify button

The screenshot shows the Microsoft Office Admin center setup wizard in a web browser. The browser tabs include 'InPrivate', 'Microsoft Office Home', and 'Office Admin center - S'. The address bar shows 'portal.office.com/adminportal/home#/setupwizard'. The navigation bar includes 'Office 365' and 'Admin center'. The setup wizard progress bar shows four steps: Step 1 (Personalize sign-in), Step 2 (Add users), Step 3 (Get apps), and Step 4 (Connect domain). Step 1 is completed, and Step 4 is the current step. The main content area is titled 'Verify domain' and contains the following text: 'To verify that you own this domain, add this DNS record to your domain (only the domain owner can do this). Don't worry, adding this record won't affect your existing email or other services and it can safely be removed at the end of setup. Follow these [step-by-step instructions](#) to create a new DNS record using the values below at your registrar, your DNS host. ([Select your registrar.](#))'. Below this, there are three fields: 'TXT name:' with a value of '@ or skip if not supported by provider.', 'TXT value:' with a value of 'MS=ms26372555', and 'TTL:' with a value of '3600 or your provider default.'. At the bottom, there is a link 'Or, add an MX record to verify ownership instead.' and a 'Verify' button with a circular arrow icon. There are also 'Back' and 'Exit and continue later' links. A 'Feedback' button is located in the bottom right corner.

Office 365

Step 1
Personalize sign-in

Step 2
Add users

Step 3
Get apps

Step 4
Connect domain

Verify domain

To verify that you own this domain, add this DNS record to your domain (only the domain owner can do this). Don't worry, adding this record won't affect your existing email or other services and it can safely be removed at the end of setup. Follow these [step-by-step instructions](#) to create a new DNS record using the values below at your registrar, your DNS host. ([Select your registrar.](#))

TXT name: @ or skip if not supported by provider.

TXT value: MS=ms26372555

TTL: 3600 or your provider default.

[Or, add an MX record to verify ownership instead.](#)

[Back](#) **Verify** [Exit and continue later](#)

[Feedback](#)

Setting up O365 for the first time – Initial setup

Now we can set up a list of users

The screenshot shows the Office 365 Admin center setup wizard. The browser address bar shows `portal.office.com/adminportal/home#/setupwizard`. The navigation bar includes 'Office 365' and 'Admin center'. The setup progress bar shows four steps: Step 1 (Personalize sign-in) is complete with a green checkmark; Step 2 (Add users) is the current step with a red dot; Step 3 (Get apps) and Step 4 (Connect domain) are not yet started, indicated by grey dots.

Add users

Let's create your user accounts and assign the Office 365 Business Premium license. When you're done, we'll give you the sign-in information and links to product downloads that you can share with them.

[What happens if you don't do this now?](#)

Display name	User name
Edward Jones	ejones @ navtechdays2016.com
Andrew Watts	awatts @ navtechdays2016.com
Cathryn Bunyard	cbunyard @ navtechdays2016.com
	@ navtechdays2016.com
	@ navtechdays2016.com

[+ Add another user](#)

[Feedback](#)

Setting up O365 for the first time – Initial setup

Now we can set up a list of users

Passwords are generated and can be downloaded or send to the users by email

Office 365 Admin center

Step 1 Personalize sign-in ✓

Step 2 Add users ✓

Step 3 Get apps ●

Step 4 Connect domain ●

Share sign-in credentials

Give your users their sign-in credentials so they can get started with Office 365.

How do you want to tell them?

Email Download Print

You can download a CSV file with the user name and temporary password. Use Excel or Notepad to open the file.

Download CSV file

Display Name	User name	Temporary password
Edward Jones	ejones@navtechdays2016.com	Dqy48732
Andrew Watts	awatts@navtechdays2016.com	Cub48458
Cathryn Bunyard	cbunyard@navtechdays2016.com	Nwa47236

Back Next Exit and continue later Feedback

Setting up O365 for the first time – Initial setup

Here we can download the Office desktop applications

Possible to skip and do that later

Every user will be able to download his own Office desktop applications

The screenshot shows the Microsoft Office Admin center setup wizard in a web browser. The browser tabs include 'InPrivate', 'Microsoft Office Home', and 'Office Admin center - S'. The address bar shows 'portal.office.com/adminportal/home#/setupwizard'. The navigation bar has 'Office 365' and 'Admin center' tabs, along with a user profile 'Arend-Jan Kauffmann'. The setup progress bar shows four steps: Step 1 'Personalize sign-in' (completed with a green checkmark), Step 2 'Add users' (completed with a green checkmark), Step 3 'Get apps' (in progress with a red dot), and Step 4 'Connect domain' (not started with a grey dot). The main heading is 'Install your Office apps'. Below it, a message states: 'Install your apps so you can take full advantage of your Office 365 subscription. After you click the below button a subscription will be assigned to you, if you don't have one already.' Two app cards are listed: 'Microsoft Office Professional Plus' with icons for Word, Excel, PowerPoint, OneNote, and Outlook, and 'Skype for Business' with its icon. Each card has an 'Install now' button with an external link icon. At the bottom, there are links for 'Back', 'Next' (highlighted in red), and 'Exit and continue later'. A 'Feedback' button is in the bottom right corner.

Office 365

Step 1
Personalize sign-in

Step 2
Add users

Step 3
Get apps

Step 4
Connect domain

Install your Office apps

Install your apps so you can take full advantage of your Office 365 subscription. After you click the below button a subscription will be assigned to you, if you don't have one already.

Microsoft Office Professional Plus
Install the following apps on your computer: Word, Excel, PowerPoint and Outlook.

W X P N O

Install now

Skype for Business
Get instant messaging, audio and video calls, online meetings and presentations, availability information, and sharing.

Install now

Want to install these apps later? There's a card on the admin center's home page with your download links.

Back **Next** Exit and continue later

Feedback

Setting up O365 for the first time – Initial setup

Now we get the option to migrate email

The screenshot shows the Office 365 Admin center setup wizard. The browser address bar shows `portal.office.com/adminportal/home#/setupwizard`. The navigation bar includes 'Office 365' and 'Admin center'. The setup progress bar shows four steps: Step 1 (Personalize sign-in), Step 2 (Add users), Step 3 (Get apps), and Step 4 (Connect domain). Steps 1, 2, and 3 are marked with green checkmarks, while Step 4 is marked with a red circle. The main content area is titled 'Migrate email messages' and contains the following text: 'If you want to keep your email messages from your current email service, we'll help you move them.' Below this, there are two radio button options: 'Don't migrate email messages' (selected) and 'Migrate email messages to Office 365'. Each option has a brief description and a link for more information. At the bottom, there are three buttons: 'Back', 'Next' (highlighted in red), and 'Exit and continue later'. A 'Feedback' button is located in the bottom right corner.

Office 365

Step 1
Personalize sign-in

Step 2
Add users

Step 3
Get apps

Step 4
Connect domain

Migrate email messages

If you want to keep your email messages from your current email service, we'll help you move them.

☒ **Don't migrate email messages**
Select this option if you have no email, you don't want to migrate email, or you'd rather migrate email later.
[What will happen if you don't migrate now?](#)

☐ **Migrate email messages to Office 365**
Select this option if you want to copy your existing email messages to Office 365. This option will take you out of setup. To resume setup, go to the Office 365 admin center home page.
[What's involved in migrating email?](#)

[Back](#) **Next** [Exit and continue later](#)

[Feedback](#)

Setting up O365 for the first time – Initial setup

Now we get the option to migrate email

New email needs to flow into Office 365

DNS can be managed by Office 365 or by yourself

The screenshot shows the Office 365 Admin center setup wizard in a web browser. The browser tabs include 'InPrivate', 'Microsoft Office Home', and 'Office Admin center - S'. The address bar shows 'portal.office.com/adminportal/home#/setupwizard'. The navigation bar has 'Office 365' and 'Admin center' tabs, along with a user profile 'Arend-Jan Kauffmann'. The setup progress bar shows four steps: Step 1 (Personalize sign-in), Step 2 (Add users), Step 3 (Get apps), and Step 4 (Connect domain). Steps 1, 2, and 3 are marked with green checkmarks, while Step 4 is marked with a red dot. The main content area is titled 'Connect your domain' and contains the following text: 'In this last step, you'll connect your domain to Office 365 by adding DNS records to your registrar.' Below this are two links: 'What's a DNS record?' and 'What's a domain registrar?'. There are two radio button options: 'Set up my online services for me. (Recommended)' and 'I'll manage my own DNS records.' The 'Recommended' option is selected. Below the 'I'll manage my own DNS records.' option is a link: 'Why would you manage your own DNS records?'. At the bottom, there are three buttons: 'Back', 'Next' (highlighted in red), and 'Exit and continue later'. A 'Feedback' button is located in the bottom right corner.

Office 365

Step 1
Personalize sign-in

Step 2
Add users

Step 3
Get apps

Step 4
Connect domain

Connect your domain

In this last step, you'll connect your domain to Office 365 by adding DNS records to your registrar.
[What's a DNS record?](#) [What's a domain registrar?](#)

☒ **Set up my online services for me. (Recommended)**
Next, you'll update your nameserver DNS records to give Office 365 permission to set up the rest of your online services on your behalf.

☐ **I'll manage my own DNS records.**
If you have an existing website, you may prefer this option. Next, we'll provide a list of DNS records that you'll need to add to your domain at your DNS host.
[Why would you manage your own DNS records?](#)

[Back](#) **Next** [Exit and continue later](#)

[Feedback](#)

Setting up O365 for the first time – Initial setup

Now we get the option to migrate email

New email needs to flow into Office 365

DNS can be managed by Office 365 or by yourself

If you let Office 365 manage your DNS you must update your nameservers

Office 365 Admin center - 5 x

portal.office.com/adminportal/home#/setupwizard

Office 365 Admin center

Step 1 Personalize sign-in ✓

Step 2 Add users ✓

Step 3 Get apps ✓

Step 4 Connect domain ●

Update your nameservers

After you update your nameservers, Office 365 will set up your online services and manage your DNS records for you.

Here are [step-by-step instructions](#) for adding a nameserver record.

⚠ NS records

One or more of these records haven't been added correctly yet. [step-by-step instructions](#)

[Copy this table](#)

Expected vs actual record	Points to address or value	Status
Expected record	ns1.bdm.microsoftonline.com	The records we detected do not match the expected values
Actual record	ns3.openprovider.eu	Invalid entry
Actual record	ns1.openprovider.nl	Invalid entry
Actual record	ns2.openprovider.be	Invalid entry
Expected record	ns2.bdm.microsoftonline.com	The records we detected do not match the expected values
Actual record	ns3.openprovider.eu	Invalid entry
Actual record	ns1.openprovider.nl	Invalid entry
Actual record	ns2.openprovider.be	Invalid entry
Expected record	ns3.bdm.microsoftonline.com	The records we detected do not match the expected values
Actual record	ns3.openprovider.eu	Invalid entry
Actual record	ns1.openprovider.nl	Invalid entry

[Feedback](#)

Setting up O365 for the first time – Initial setup

Now we get the option to migrate email

New email needs to flow into Office 365

DNS can be managed by Office 365 or by yourself

If you manage DNS yourself, you need to update your DNS

The screenshot shows the Office 365 Admin center setup wizard. The progress bar indicates that Steps 1 (Personalize sign-in), 2 (Add users), and 3 (Get apps) are complete, while Step 4 (Connect domain) is the current step. The main heading is 'Add DNS Records'. Below this, a message states: 'To add the following DNS records for navtechdays2016.com, go to your registrar: your DNS host. You can view all DNS records grouped by the services that the DNS records support.'

Under the 'MX records' section, a warning icon and text state: 'Important: if you already have an MX record on your registrar, changing your MX records to the values below will redirect new incoming email to your new Office 365 email addresses, and email will no longer be delivered to your previous email service. Once you've changed the MX records, if you want to access old emails through your new Office 365 email account, you must migrate the old email messages.' A 'Copy this table' button is present.

Expected vs actual record	Priority	Host name	Points to address or value	TTL	Status
Expected record Actual record	0	@	navtechdays2016-com.mail.protection.outlook.com	3600	No records found Missing record

Under the 'CNAME records' section, a warning icon and text state: 'One or more of these records haven't been added correctly yet. step-by-step instructions'. A 'Copy this table' button is present.

Expected vs actual record	Host name	Points to address or value	TTL	Status
Expected record Actual record	autodiscover	autodiscover.outlook.com	3600	No records found Missing record
Expected record Actual record	sip	sipdir.online.lync.com	3600	No records found Missing record
Expected record Actual record	lyncdiscover	webdir.online.lync.com	3600	No records found Missing record

A 'Feedback' button is located at the bottom right of the page.

Setting up O365 for the first time – Initial setup

Now we get the option to migrate email

New email needs to flow into Office 365

DNS can be managed by Office 365 or by yourself

If you manage DNS yourself, you need to update your DNS

Records Edit				
« < 1/1 > » 250 Filters				
Name ▾	Type ▾	Content ▾	Priority ▾	TTL ▾
autodiscover.navtechdays2016.com	CNAME	autodiscover.outlook.com		1 hour
enterpriseenrollment.navtechdays2016.com	CNAME	enterpriseenrollment.manage.microsoft.com		1 hour
enterpriseregistration.navtechdays2016.com	CNAME	enterpriseregistration.windows.net		1 hour
lyncdiscover.navtechdays2016.com	CNAME	webdir.online.lync.com		1 hour
msoid.navtechdays2016.com	CNAME	clientconfig.microsoftonline-p.net		1 hour
sip.navtechdays2016.com	CNAME	sipdir.online.lync.com		1 hour
navtechdays2016.com	MX	navtechdays2016-com.mail.protection.outlook.com	0	1 hour
navtechdays2016.com	NS	ns1.openprovider.nl		1 day
navtechdays2016.com	NS	ns2.openprovider.be		1 day
navtechdays2016.com	NS	ns3.openprovider.eu		1 day
navtechdays2016.com	SOA	ns1.openprovider.nl dns@openprovider.eu 2016111704		1 day
navtechdays2016.com	SPF	"v=spf1 include:spf.protection.outlook.com -all"		1 hour
navtechdays2016.com	TXT	MS=ms26372555		1 hour

Setting up O365 for the first time – Initial setup

Congratulations!

You have now a fully
working Office 365 tenant

The screenshot shows the Office 365 Admin center setup completion page. The browser address bar shows the URL `portal.office.com/adminportal/home#/setupwizard`. The page has a dark blue header with 'Office 365' and 'Admin center' tabs, and a user profile 'Arend-Jan Kauffmann'. Below the header is a progress bar with four steps: 'Step 1 Personalize sign-in', 'Step 2 Add users', 'Step 3 Get apps', and 'Step 4 Connect domain'. All steps are marked with green checkmarks. The main content area says 'You've reached the end of Office 365 setup' and provides instructions on how to add users or set up services. At the bottom right is a 'Feedback' button.

Office 365 Admin center

Step 1 Personalize sign-in ✓

Step 2 Add users ✓

Step 3 Get apps ✓

Step 4 Connect domain ✓

You've reached the end of Office 365 setup

You've reached the end of Office 365 setup. If you still need to add users or set up online services, you can do that from the Office 365 admin center.

★★★★★

[Go to the Office 365 admin center ↻](#)

Feedback

Setting up O365 for the first time – Initial setup

Congratulations!

You have now a fully working Office 365 tenant

In the Admin center we can find the users

Not that the initial user has no license!

Office 365 Admin center

Home > Active users

NAV Techdays 2016 DEMO

+ Add a user More Filters All users Search users Export

	Display name	User name	Status
<input type="checkbox"/>	Andrew Watts	awatts@navtechdays2016.com	Office 365 Business Premium
<input type="checkbox"/>	Arend-Jan Kauffmann	admin@navtechdays2016.onmicrosoft.com	Unlicensed
<input type="checkbox"/>	Cathryn Bunyard	cbunyard@navtechdays2016.com	Office 365 Business Premium
<input type="checkbox"/>	Edward Jones	ejones@navtechdays2016.com	Office 365 Business Premium

+ User Types of users Filters

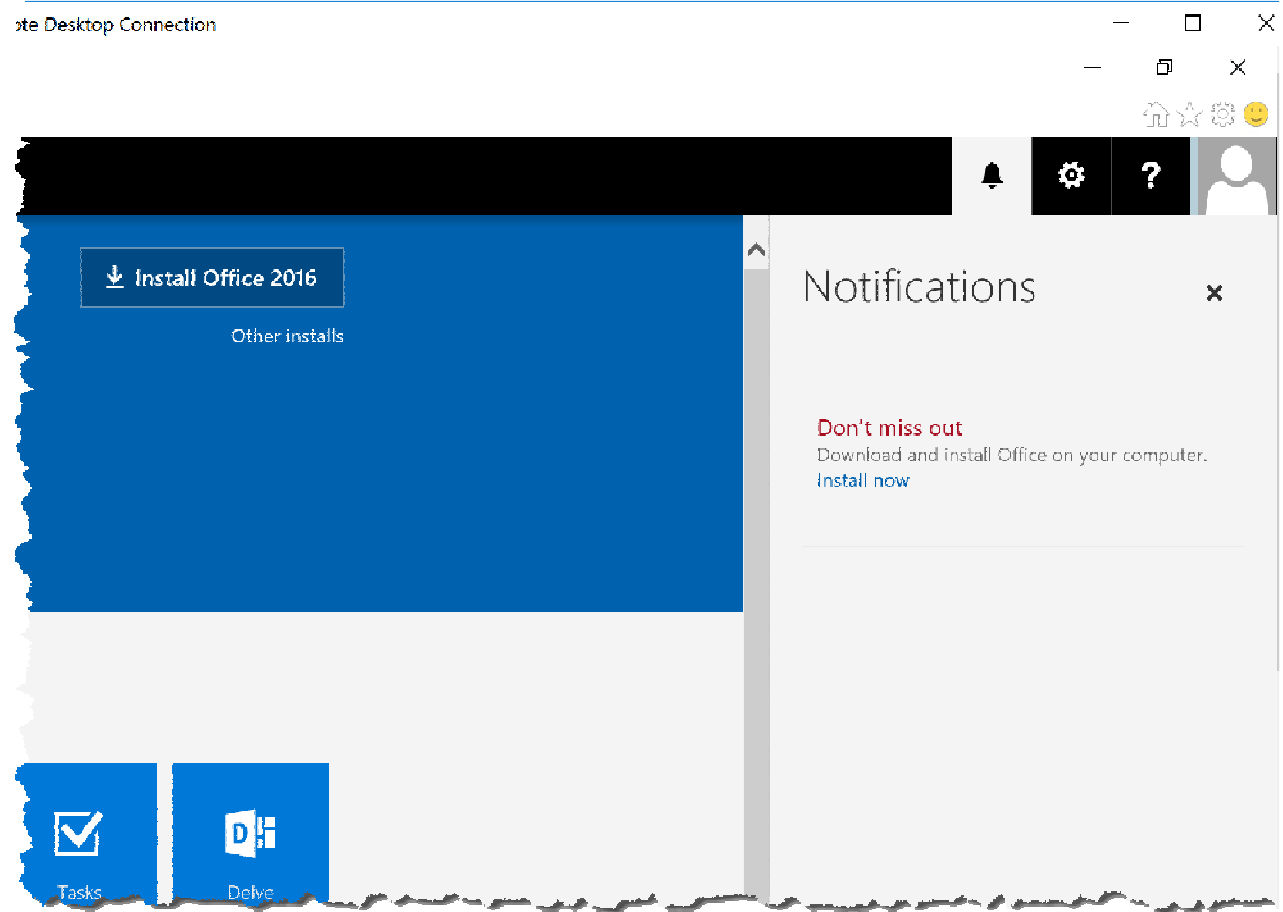
Users are people in your organization who can access Office 365. Different types of users and accounts can use Office 365 in distinct ways. Learn how filtering will help you keep this list under control – before it gets too long.

Feedback

Office 365 Admin center Demo

Download and install Office Desktop Applications

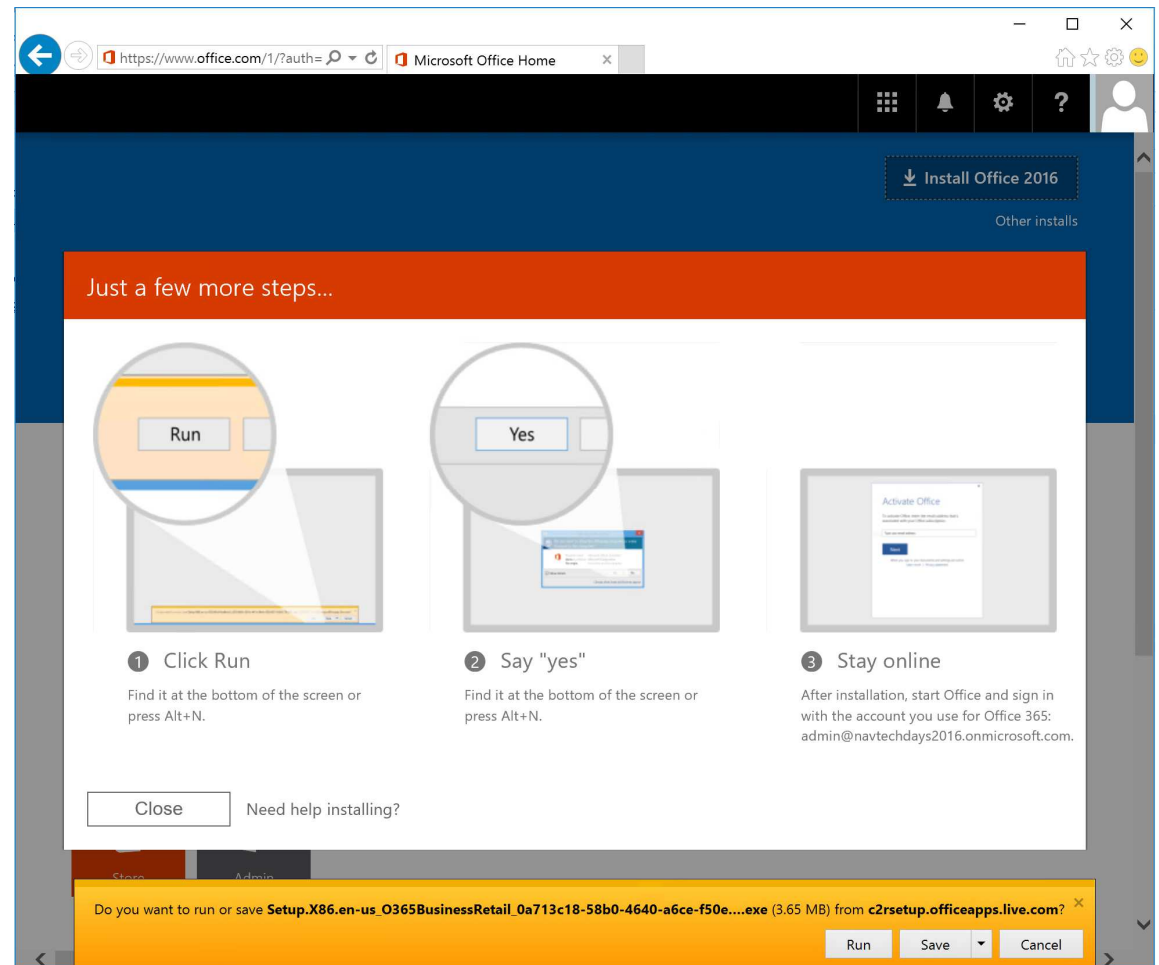
Everywhere in the Office portal you get a link to download and install Office 2016



Download and install Office Desktop Applications

Everywhere in the Office portal you get a link to download and install Office 2016

Just a few steps...

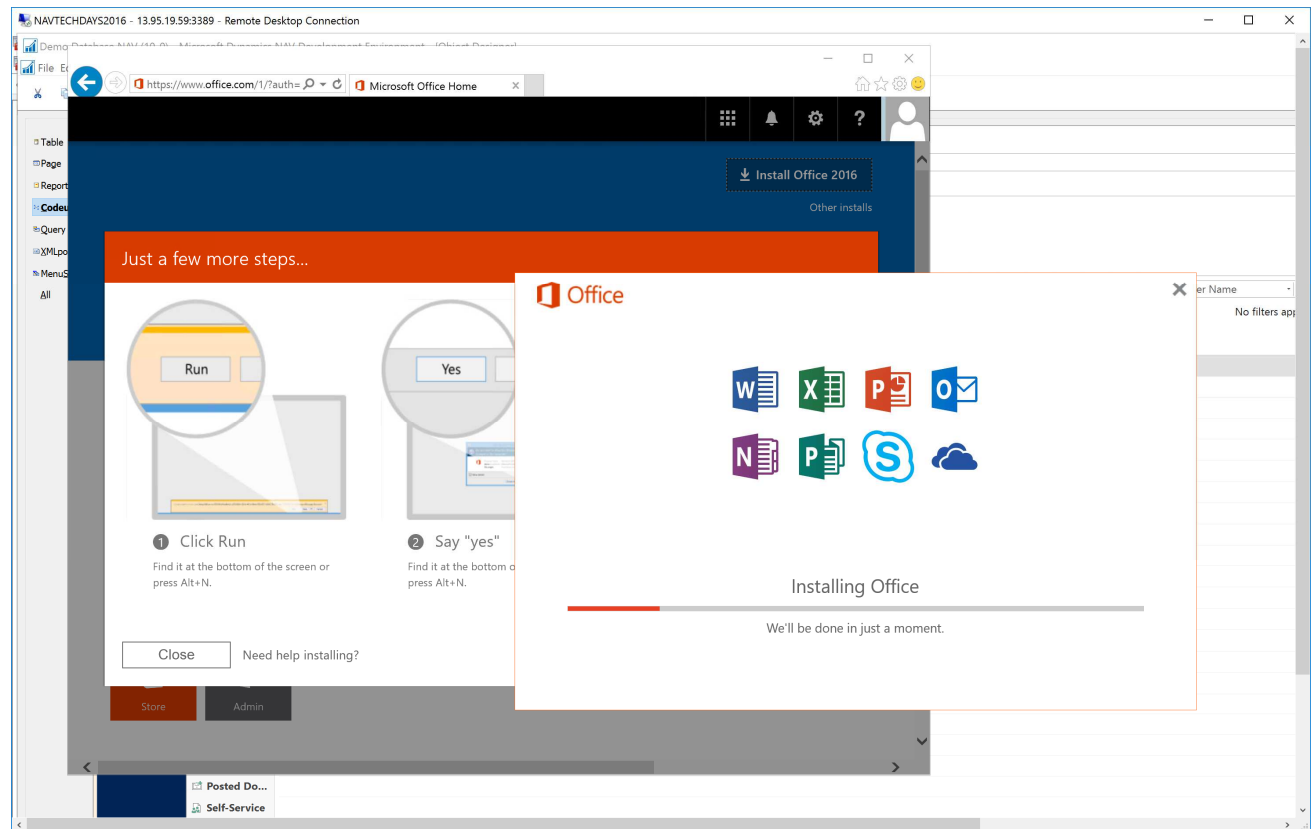


Download and install Office Desktop Applications

Everywhere in the Office portal you get a link to download and install Office 2016

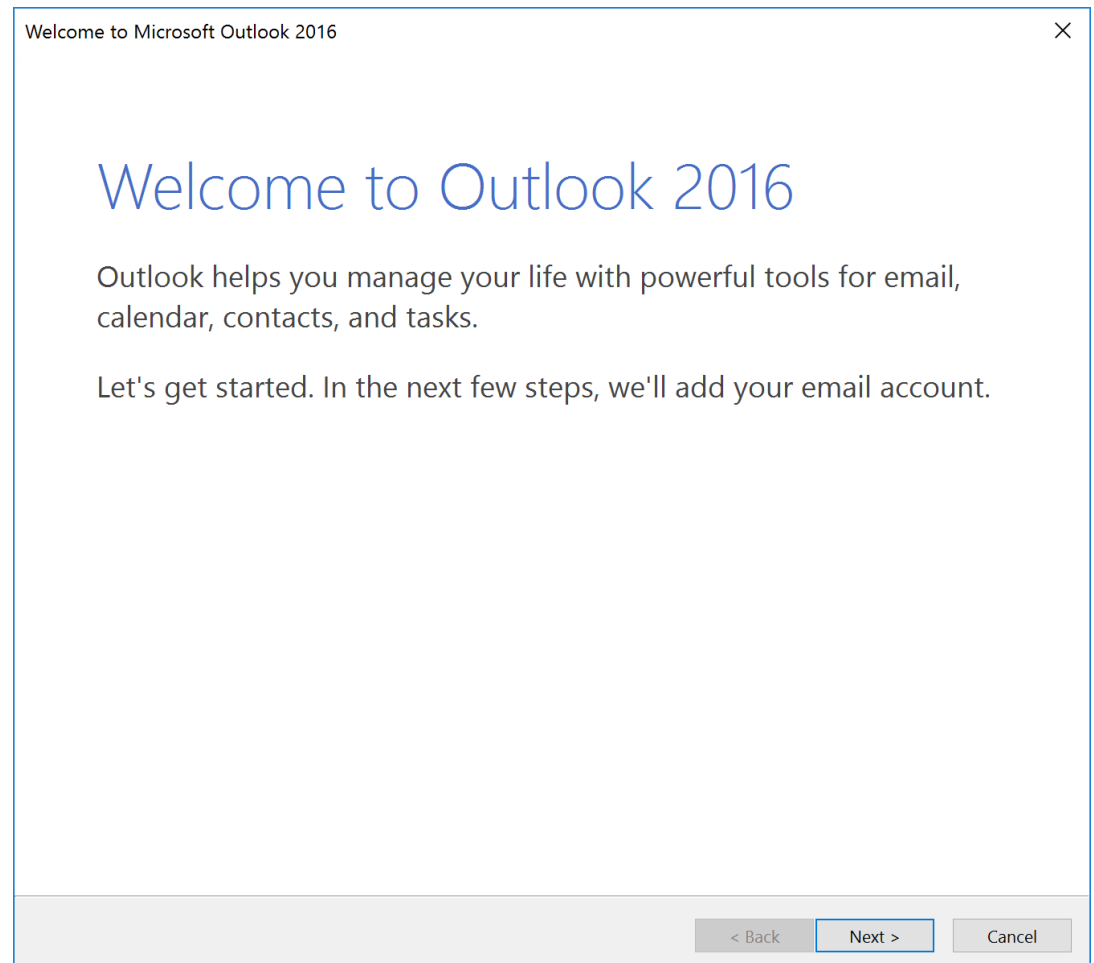
Just a few steps...

Installing takes some minutes



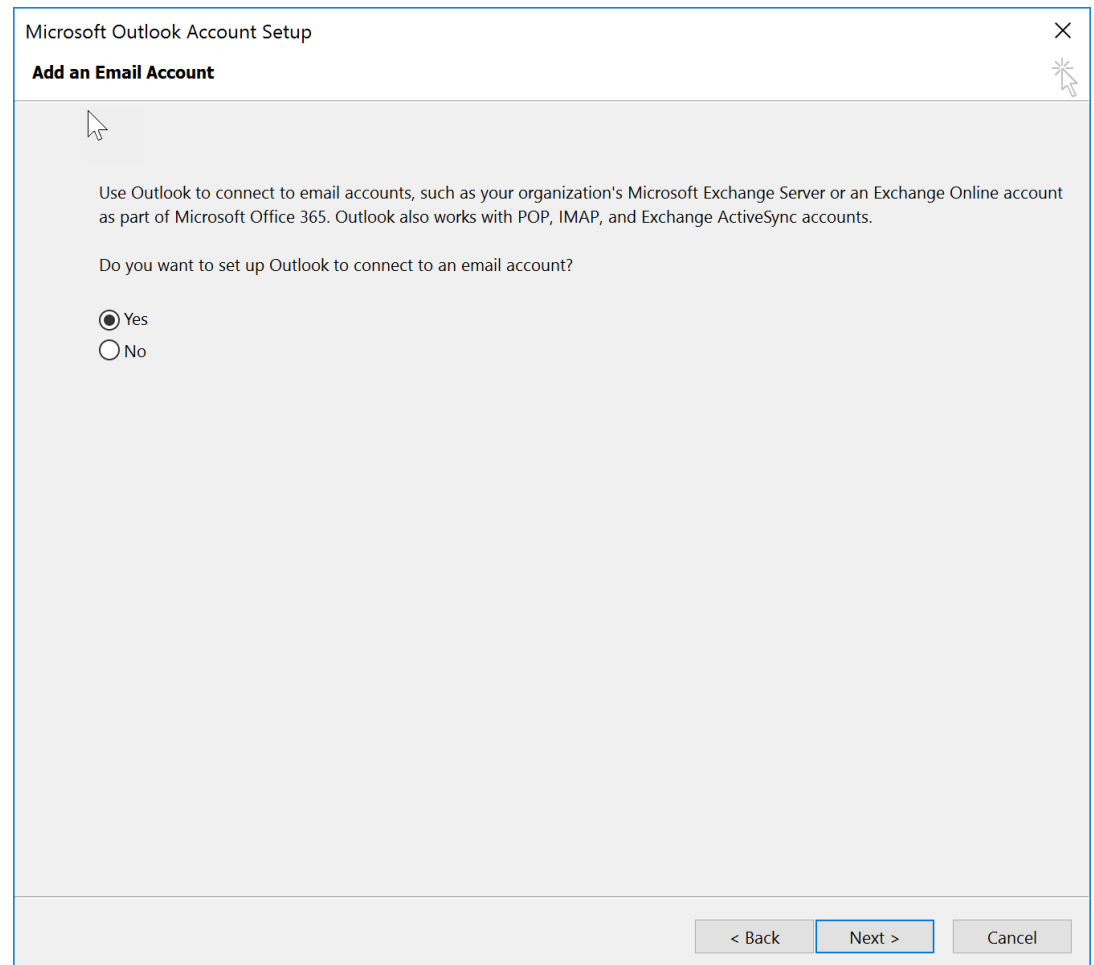
Download and install Office Desktop Applications

Finally we need to configure Outlook



Download and install Office Desktop Applications

Finally we need to configure Outlook



Microsoft Outlook Account Setup

Add an Email Account

Use Outlook to connect to email accounts, such as your organization's Microsoft Exchange Server or an Exchange Online account as part of Microsoft Office 365. Outlook also works with POP, IMAP, and Exchange ActiveSync accounts.

Do you want to set up Outlook to connect to an email account?

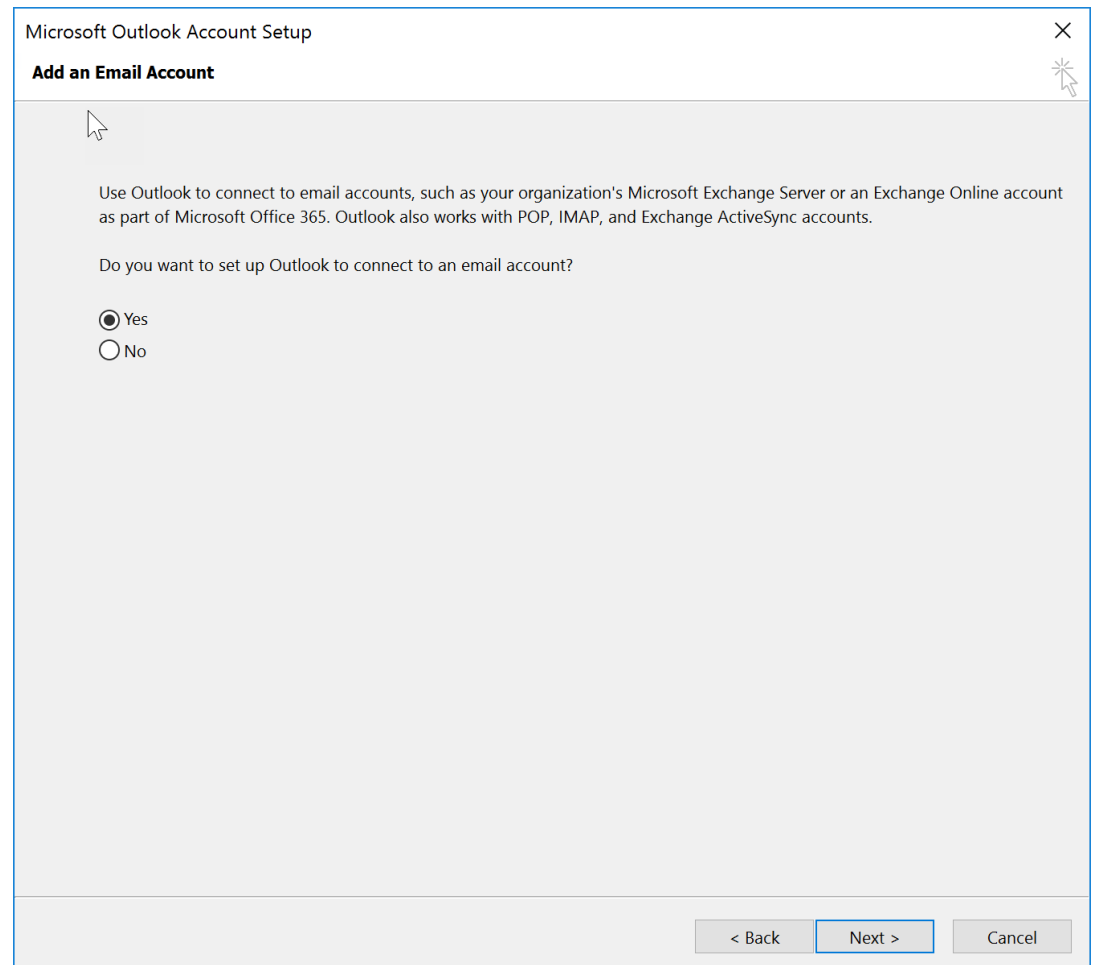
☒ Yes

☐ No

< Back Next > Cancel

Download and install Office Desktop Applications

Finally we need to configure Outlook



Microsoft Outlook Account Setup

Add an Email Account

Use Outlook to connect to email accounts, such as your organization's Microsoft Exchange Server or an Exchange Online account as part of Microsoft Office 365. Outlook also works with POP, IMAP, and Exchange ActiveSync accounts.

Do you want to set up Outlook to connect to an email account?

☒ Yes

☐ No

< Back Next > Cancel

Download and install Office Desktop Applications

Finally we need to configure Outlook

Just type in the Office 365 credentials...

Add Account

Auto Account Setup
Outlook can automatically configure many email accounts.

☒ **Email Account**

Your Name:
Example: Ellen Adams

Email Address:
Example: ellen@contoso.com

Password:
Retype Password:
Type the password your Internet service provider has given you.

☐ **Manual setup or additional server types**

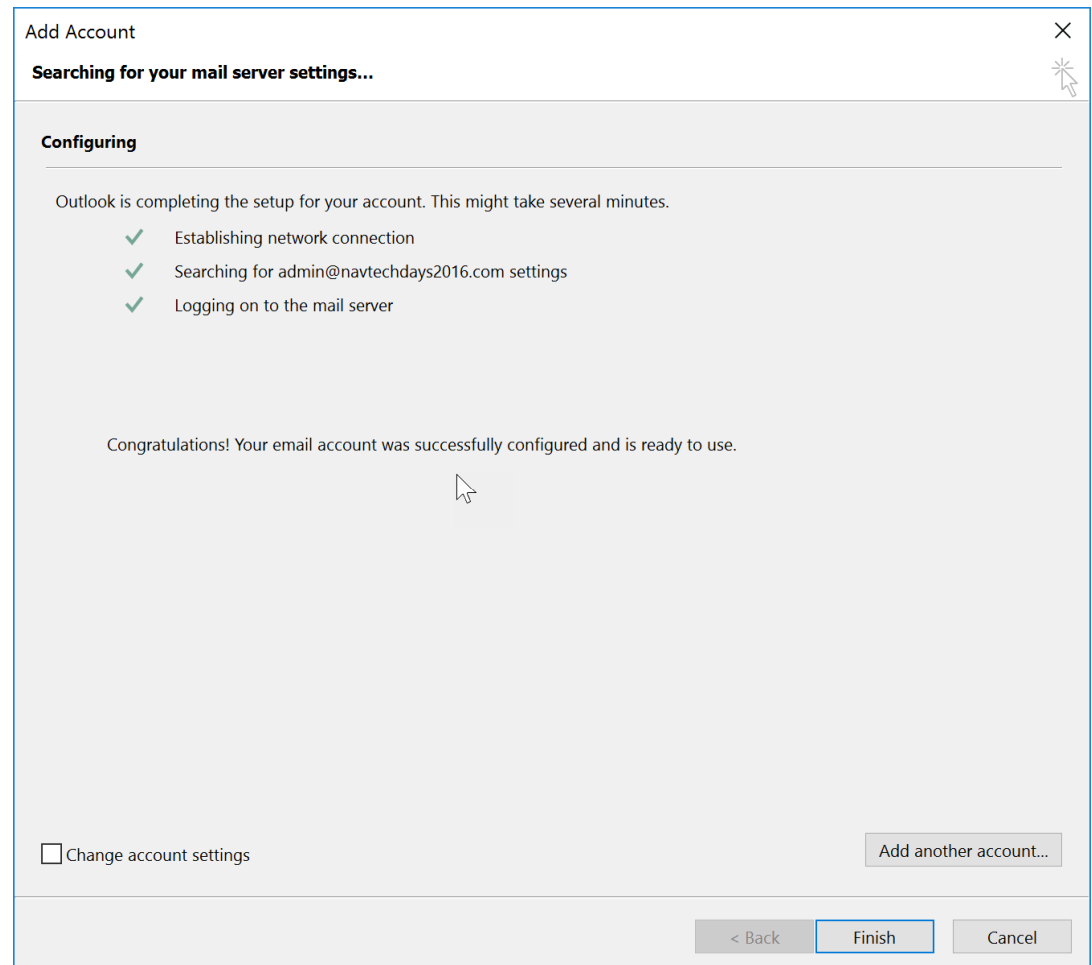
< Back Next > Cancel

Download and install Office Desktop Applications

Finally we need to configure Outlook

Just type in the Office 365 credentials...

...and Outlook finds the correct server settings, thanks to the DNS settings we did earlier



Let's now set up NAV with Office 365 SSO

```
Administrator: Windows PowerShell ISE
File Edit View Tools Debug Add-ons Help
Untitled1.ps1 SetO365SSO.ps1 X
1 Import-Module C:\NAVDVD\WindowsPowerShellScripts\NAVOffice365Administration\NAVOffice365Administration.psm1
2
3 Set-NavSingleSignOnWithOffice365 -NavServerInstance DynamicsNAV100 `
4 -NavWebServerInstanceName DynamicsNAV100 `
5 -NavWebAddress https://navtechdays2016.westeurope.cloudapp.azure.com/dynamicsnav100/webclient `
6 -NavUser admin `
7 -AuthenticationEmail admin@navtechdays2016.onmicrosoft.com `
8 -AuthenticationEmailPassword (Read-Host "Enter O365 password" -AsSecureString) `
9 -NavServerCertificateThumbprint A2FB8B680A38D4D58530EAAEDA39CF16B44E3A7E
10

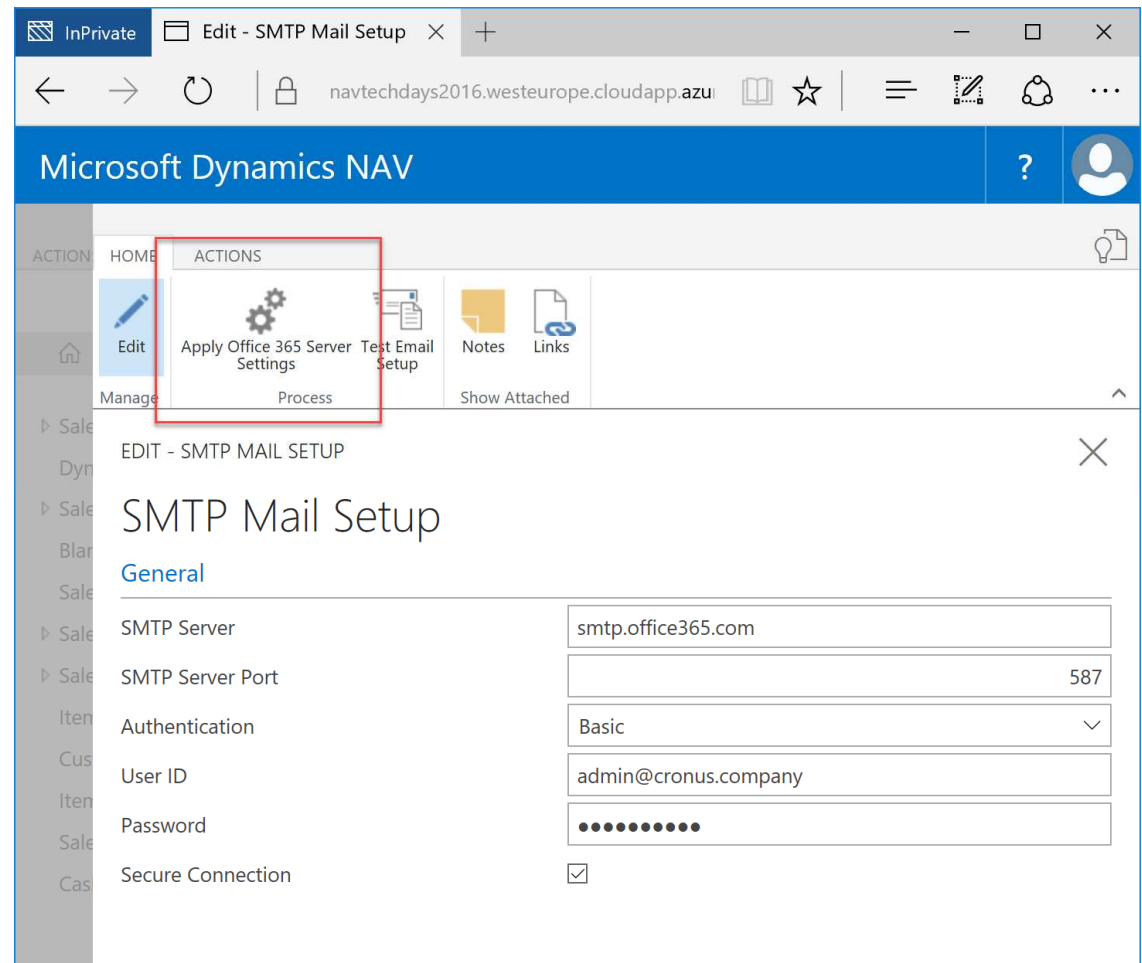
PS C:\Users\vmadmin> C:\Users\vmadmin\Documents\SetO365SSO.ps1
WARNING: The new settings value will not take effect until you stop and restart the service.
WARNING: The new settings value will not take effect until you stop and restart the service.
WARNING: The new settings value will not take effect until you stop and restart the service.
WARNING: The new settings value will not take effect until you stop and restart the service.
WARNING: The new settings value will not take effect until you stop and restart the service.
The following symmetric key was created as one was not supplied x+hqpy3fjKv5Na+jZ5kI1QDeqfVQy8mg8fwEk0EL0Cg=
WARNING: The new settings value will not take effect until you stop and restart the service.
The following symmetric key was created as one was not supplied OZIJpmboVwGVK0086yKUJxxbSY1kQWQ2o9HRHASlEg4=
The following symmetric key was created as one was not supplied 2owogPncZyPKWV5gfBAn2mKW+hH1vHA0QC791k1ioV4=
https://login.windows.net/navtechdays2016.onmicrosoft.com/wsfed?wa=wsignin1.0%26wtrealm=http://dynamicsnavwincient,

PS C:\Users\vmadmin>
```


Office 365 Single Sign On Demo

Emailing from Dynamics NAV

SMTP Mail Setup can be automatically filled with correct settings



The screenshot shows the Microsoft Dynamics NAV interface. The browser address bar indicates the URL `navtechdays2016.westeurope.cloudapp.azure.com`. The Dynamics NAV header is visible. In the ACTIONS pane, the 'Apply Office 365 Server Settings' button is highlighted with a red rectangle. Below this, the 'EDIT - SMTP MAIL SETUP' window is open, showing the 'General' tab. The form contains the following fields:

Field	Value
SMTP Server	smtp.office365.com
SMTP Server Port	587
Authentication	Basic
User ID	admin@cronus.company
Password	••••••••
Secure Connection	<input checked="" type="checkbox"/>

Emailing from Dynamics NAV

SMTP Mail Setup can be automatically filled with correct settings...

... which is not really rocket science...

```
Demo Database NAV (10-0) - Microsoft Dynamics NAV Development Environment - [Codeunit 400 SMTP Mail - C/AL Editor]
File Edit View Tools Window Help

104
105 ApplyOffice365Smtpt(VAR SMTPMailSetupConfig : Record "SMTP Mail Setup")
106 // This might be changed by the Microsoft Office 365 team.
107 // Current source: http://technet.microsoft.com/library/dn554323.aspx
108 SMTPMailSetupConfig."SMTP Server" := Get0365SmtptServer;
109 SMTPMailSetupConfig."SMTP Server Port" := Get0365SmtptPort;
110 SMTPMailSetupConfig.Authentication := Get0365SmtptAuthType;
111 SMTPMailSetupConfig."Secure Connection" := TRUE;
112
113 IsOffice365Setup(VAR SMTPMailSetupConfig : Record "SMTP Mail Setup") : Boolean...
128 [EventSubscriber] HandleSMTPRegisterServiceConnection(VAR ServiceConnection : Record
146 GetBody() : Text
147 EXIT(Mail.Body);
148
149 LOCAL Get0365SmtptServer() : Text[250]
150 EXIT('smtp.office365.com')
151
152 LOCAL Get0365SmtptPort() : Integer
153 EXIT(587);
154
155 LOCAL Get0365SmtptAuthType() : Integer
156 EXIT(SMTPMailSetup.Authentication::Basic);
157
```

Emailing from Dynamics NAV

SMTP Mail Setup can be automatically filled with correct settings

This account becomes the sender !!!

The screenshot shows the 'Edit - SMTP Mail Setup' window in Microsoft Dynamics NAV. The window has a blue header bar with 'Microsoft Dynamics NAV' and a user profile icon. Below the header is a navigation pane with 'HOME' and 'ACTIONS' tabs. The 'ACTIONS' tab is active, showing a grid of icons: 'Edit' (pencil), 'Apply Office 365 Server Settings' (gears), 'Test Email Setup' (envelope), 'Notes' (notepad), and 'Links' (chain). The main content area is titled 'EDIT - SMTP MAIL SETUP' and 'SMTP Mail Setup'. Under the 'General' section, there are several fields: 'SMTP Server' (smtp.office365.com), 'SMTP Server Port' (587), 'Authentication' (Basic), 'User ID' (admin@cronus.company), 'Password' (masked with dots), and 'Secure Connection' (checked).

SMTP Mail Setup	
General	
SMTP Server	smtp.office365.com
SMTP Server Port	587
Authentication	Basic
User ID	admin@cronus.company
Password
Secure Connection	<input checked="" type="checkbox"/>

Emailing from Dynamics NAV

SMTP Mail Setup can be automatically filled with correct settings

This account becomes the sender !!!

The screenshot shows the 'Edit - SMTP Mail Setup' window in Microsoft Dynamics NAV. The window has a blue header bar with 'Microsoft Dynamics NAV' and a user profile icon. Below the header is a ribbon with 'HOME' and 'ACTIONS' tabs. The 'HOME' tab is active, showing a grid of actions: 'Edit' (pencil icon), 'Apply Office 365 Server Settings' (gears icon), 'Test Email Setup' (envelope icon), 'Notes' (notepad icon), and 'Links' (link icon). Below the ribbon is a list of actions: 'Manage', 'Process', and 'Show Attached'. The main content area is titled 'EDIT - SMTP MAIL SETUP' and 'SMTP Mail Setup'. Under the 'General' section, there are several fields: 'SMTP Server' (smtp.office365.com), 'SMTP Server Port' (587), 'Authentication' (Basic), 'User ID' (admin@cronus.company), 'Password' (masked with dots), and 'Secure Connection' (checked).

SMTP Mail Setup	
General	
SMTP Server	smtp.office365.com
SMTP Server Port	587
Authentication	Basic
User ID	admin@cronus.company
Password
Secure Connection	<input checked="" type="checkbox"/>

Emailing from Dynamics NAV

SMTP Mail Setup can be automatically filled with correct settings

This account becomes the sender !!!

```
Demo Database NAV (10-0) - Microsoft Dynamics NAV Development Environment - [Codeunit 9520 Mail Management - C/AL Editor]
File Edit View Tools Window Help

141 LOCAL QualifyFromAddress()
142 IF TempEmailItem."From Address" <> '' THEN
143     EXIT;
144
145 MailForEmails.CollectCurrentUserEmailAddresses(TempPossibleEmailNameValueBuffer);
146 IF SMTPSupported THEN BEGIN
147     IF IsConfiguredFor0365 THEN
148         IF AssignFromAddressIfExist(TempPossibleEmailNameValueBuffer,'SMTPSetup') THEN
149             EXIT;
150
151     IF AssignFromAddressIfExist(TempPossibleEmailNameValueBuffer,'UserSetup') THEN
152         EXIT;
153     IF AssignFromAddressIfExist(TempPossibleEmailNameValueBuffer,'AuthEmail') THEN
154         EXIT;
155     IF AssignFromAddressIfExist(TempPossibleEmailNameValueBuffer,'AD') THEN
156         EXIT;
157     IF AssignFromAddressIfExist(TempPossibleEmailNameValueBuffer,'SMTPSetup') THEN
158         EXIT;
159 END;
160 IF TempPossibleEmailNameValueBuffer.ISEMPTY THEN BEGIN
161     IF FileManagement.IsWebClient THEN
162         ERROR(FromAddressWasNotFoundErr);
163     TempEmailItem."From Address" := '';
164     EXIT;
165 END;
166
167 IF AssignFromAddressIfExist(TempPossibleEmailNameValueBuffer,'') THEN
168     EXIT;
169
```

Emailing from Dynamics NAV

SMTP Mail Setup can be automatically filled with correct settings

This account becomes the sender !!!

How to send as another user?

```
Demo Database NAV (10-0) - Microsoft Dynamics NAV Development Environment - [Codeunit 9520 Mail Management - C/AL Editor]
File Edit View Tools Window Help

141 LOCAL QualifyFromAddress()
142 IF TempEmailItem."From Address" <> '' THEN
143     EXIT;
144
145 MailForEmails.CollectCurrentUserEmailAddresses(TempPossibleEmailNameValueBuffer);
146 IF SMTPSupported THEN BEGIN
147     IF IsConfiguredFor0365 THEN
148         IF AssignFromAddressIfExist(TempPossibleEmailNameValueBuffer,'SMTPSetup') THEN
149             EXIT;
150
151     IF AssignFromAddressIfExist(TempPossibleEmailNameValueBuffer,'UserSetup') THEN
152         EXIT;
153     IF AssignFromAddressIfExist(TempPossibleEmailNameValueBuffer,'AuthEmail') THEN
154         EXIT;
155     IF AssignFromAddressIfExist(TempPossibleEmailNameValueBuffer,'AD') THEN
156         EXIT;
157     IF AssignFromAddressIfExist(TempPossibleEmailNameValueBuffer,'SMTPSetup') THEN
158         EXIT;
159 END;
160 IF TempPossibleEmailNameValueBuffer.ISEMPTY THEN BEGIN
161     IF FileManagement.IsWebClient THEN
162         ERROR(FromAddressWasNotFoundErr);
163     TempEmailItem."From Address" := '';
164     EXIT;
165 END;
166
167 IF AssignFromAddressIfExist(TempPossibleEmailNameValueBuffer,'') THEN
168     EXIT;
169
```

SMTP Relay with Office 365

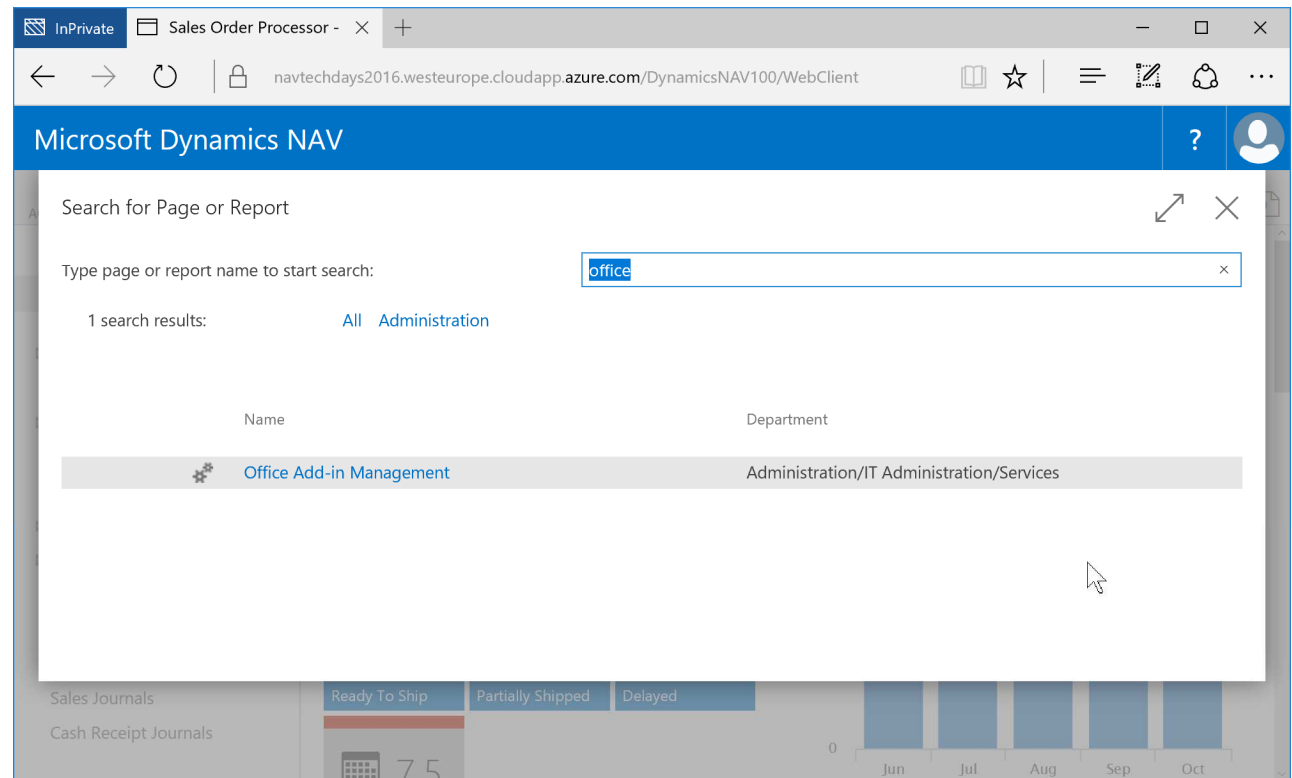
- Option 1: Authenticate with an Office 365 inbox (the default in Dynamics NAV)
- Option 2: Direct send – only possible when sending **in** your organization
- Option 3: Configure a connector
- Option 4: Do not use Office 365

Some other info

- Shared mailboxes
- Synchronization of on-premise Active Directory

Set up Office Add-ins

Search for the Office Add-in Management page



Set up Office Add-ins

Search for the Office Add-in Management page

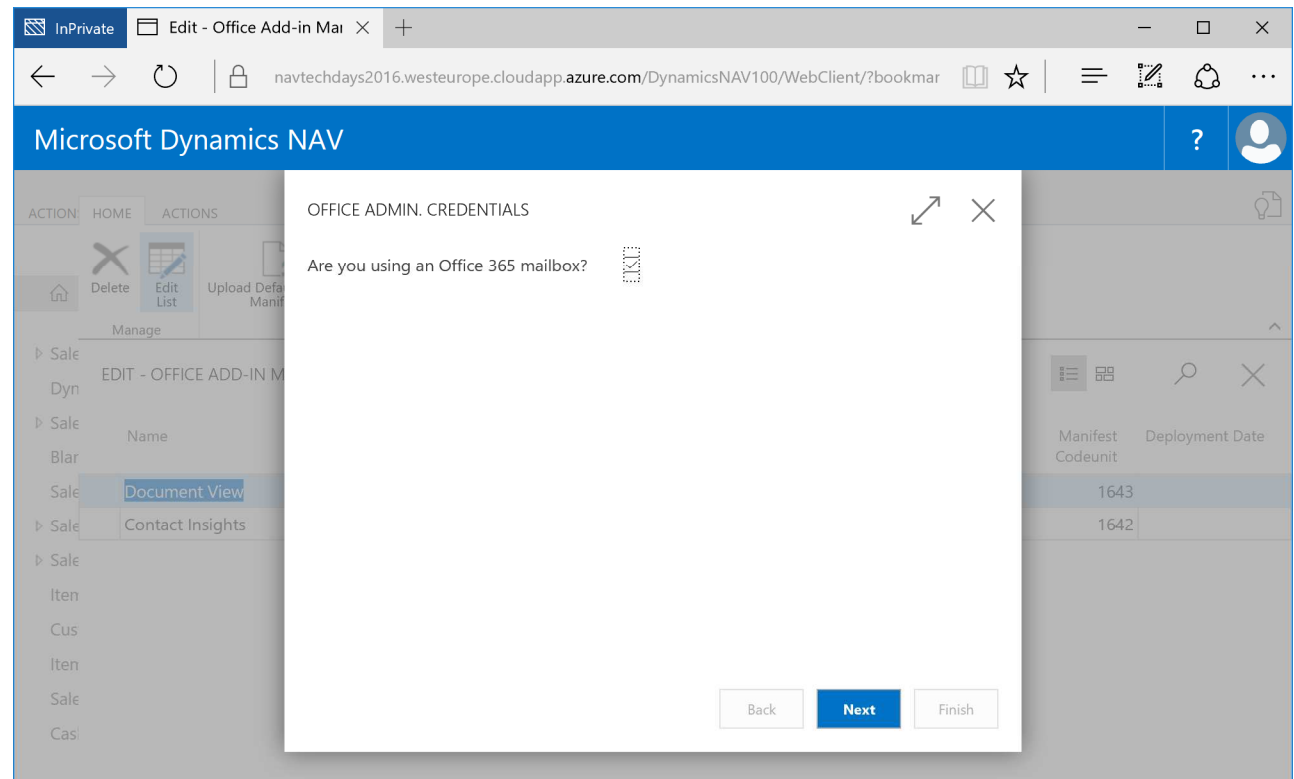
The screenshot shows the 'EDIT - OFFICE ADD-IN MANAGEMENT' page in Microsoft Dynamics NAV. The page has a top navigation bar with 'Microsoft Dynamics NAV' and a user profile icon. Below this is a ribbon with tabs for 'HOME' and 'ACTIONS'. The 'ACTIONS' tab is active, showing options like 'Delete', 'Edit List', 'Upload Default Add-in Manifest', 'Download Add-in Manifest', 'Deploy Add-in', 'Deploy All Add-ins', 'Remove Add-in', 'Notes', 'Links', and 'Open in Excel'. The main content area displays a table of installed add-ins.

Name	Description	Version	Manifest Codeunit	Deployment Date
Document View	Provides a link directly to a business document	1.1.0.0	1643	
Contact Insights	Provides customer/vendor information in Outlook	1.2.0.0	1642	

Set up Office Add-ins

Search for the Office Add-in Management page

Click on Deploy All Add-ins



Set up Office Add-ins

Search for the Office Add-in Management page

Click on Deploy All Add-ins

Provide the O365 admin credentials

The screenshot shows a web browser window with the URL `navtechdays2016.westeurope.cloudapp.azure.com/DynamicsNAV100/WebClient/?bookmar`. The page title is "Microsoft Dynamics NAV". A modal dialog box titled "OFFICE ADMIN. CREDENTIALS" is open. It contains two input fields: "Office 365 admin email address" with the value `admin@cronus.company`, and "Office 365 admin password" with masked characters. At the bottom of the dialog are three buttons: "Back", "Next", and "Finish". The background shows a table with columns "Manifest Codeunit" and "Deployment Date", containing rows with values 1643 and 1642.

Manifest Codeunit	Deployment Date
1643	
1642	

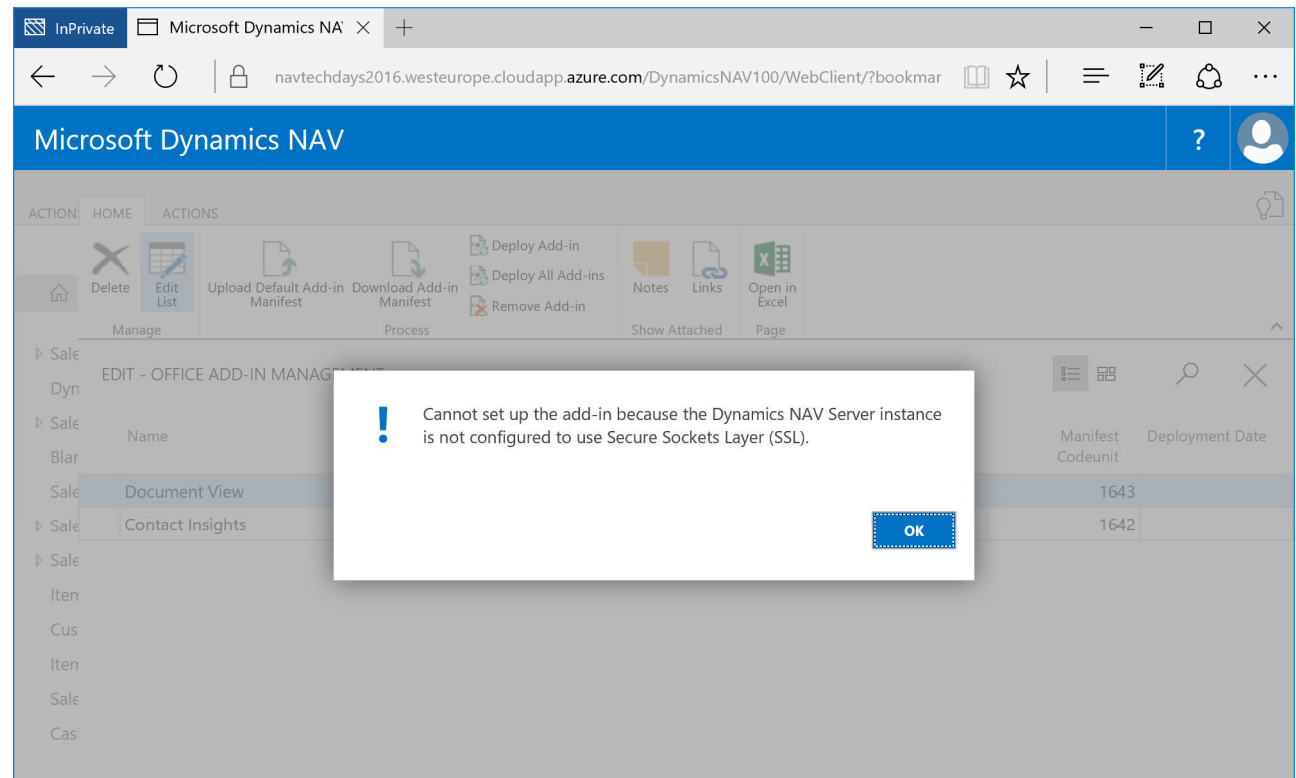
Set up Office Add-ins

Search for the Office Add-in Management page

Click on Deploy All Add-ins

Provide the O365 admin credentials

... and face a scary error...



Set up Office Add-ins

Search for the Office Add-in Management page

Click on Deploy All Add-ins

Provide the O365 admin credentials

... and face a scary error...

... because of this code in Codeunit 1652

```
376 LOCAL VerifyHttps()  
377 WebClientUrl := ConstructURL('', '', '');  
378 IF (NOT TestMode) AND (LOWERCASE(COPYSTR(WebClientUrl, 1, 5)) <> 'https') THEN  
379     ERROR(STRSUBSTNO(WebClientHttpsErr, PRODUCTNAME.SHORT));
```

Set up Office Add-ins

Search for the Office Add-in Management page

Click on Deploy All Add-ins

Provide the O365 admin credentials

... and face a scary error...

... because of this code in Codeunit 1652

Here we correct this

Client Services

Chunk Size:	28	Operation Timeout:	MaxValue
Compression Threshold:	64	Port:	7046
Enable Client Services:	<input checked="" type="checkbox"/>	Prohibited File Types:	ade;adp;app;asp;bas;bat;chm;cmd;com;...
Exchange Auth. Metadata Location:	https://outlook.office365.com/	Protection Level:	EncryptAndSign
Idle Client Timeout:	MaxValue	Reconnect Period:	00:10:00
Keep Alive Interval:	00:02:00	Token Signing Key:	
Max Concurrent Connections:	500	Use the simplified filters:	<input type="checkbox"/>
Max Items in Object Graph:	512	Web Client Base URL:	https://navtechdays2016.westeurope.cl...
Max Number of Orphaned Connections:	20	Windows Client Base URL:	
Max Upload Size:	30		

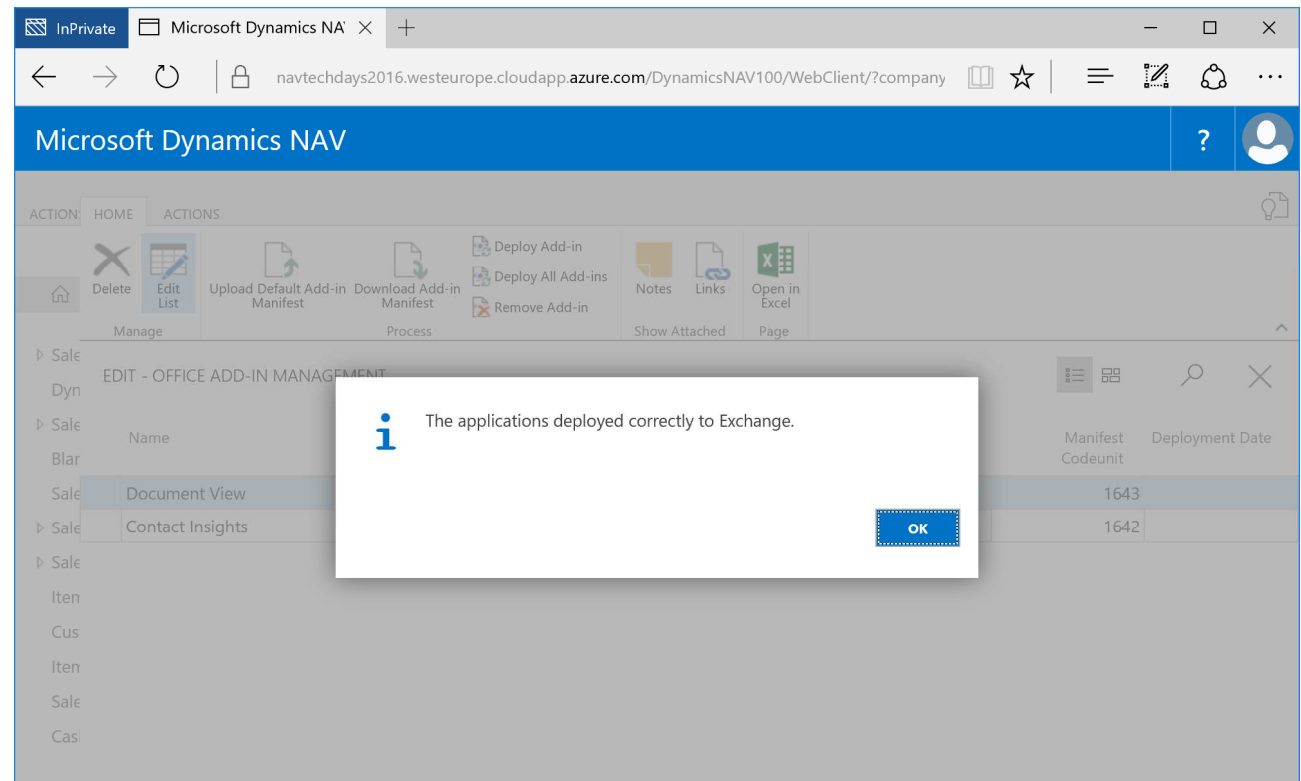
Set up Office Add-ins

Search for the Office Add-in Management page

Click on Deploy All Add-ins

Provide the O365 admin credentials

And ready!



Office Add-ins Demo

More options with Office Add-ins

- You may need to localize them
- You can change them or introduce new options
- There is currently no documentation

[illegible]

