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|          |             |
|----------|-------------|
| Category | Technical   |
| Course   | BOS Config. |
| Version  | 1.1         |
| Client   | Generic     |
| Software | 2.18.4.64   |

# Configure Email Mailbox and Templates

Use the email properties to configure mailbox settings and email templates, so that you can electronically send EOP Statements and/or Directs Purchase Orders.

This task is usually completed by a Network Administrator.

### Hints and Tips

- ✓ There are three parts to set up before you can use the email feature in Surefire:
  1. Enter the Email Account Credentials for your business.
  2. Customise the Template for the automated email that gets sent to recipients.
  3. Ensure each recipient has an email saved in their Account.
- ✓ If your business has separate accounting software (such as MYOB) which surefire integrates into, email is available through this too
- ✓ The emailing of Orders/EOP Statements is triggered by going into that function and selecting the Email option.
  - For Orders: Email from the open PO Order for that Supplier, or from the Payables | PO Summary screen.
  - For EOP Statements: Email from the EOP Wizard.
- ✓ In **Server** details, if you enter **Reply Email** as [Your Name] <youremail@gmail.com>, the email will appear **From** Your Name, rather than show your full email address.

|   |   |
|---|---|
| <input checked="" type="checkbox"/> Rebecca Burton          | <input checked="" type="checkbox"/> This is a Test This is a Test |
| <input type="checkbox"/> rebecca.burton@surefiresystems.com | <input type="checkbox"/> This is a Test This is a Test            |

### Procedure to Set up Email Properties

| 1.               | Sign up or obtain credentials to either a 3rd party email server platform (such as mailjet, mailchimp etc), or an SMTP exchange server.   |           |                 |                  |  |                |   |  |
|------------------|---|-----------|-----------------|------------------|--|----------------|---|--|
| 2.               | Install the free PDF printer software CutePDF, version 4.<br><a href="https://www.cutepdf.com/Products/CutePDF/writer.asp">https://www.cutepdf.com/Products/CutePDF/writer.asp</a><br><i>*This is the only pdf printer that supports saving the pdf to a default folder, from which the emailer automatically sends from.*</i><br><i>*The install prompts you to install a PS2PDF convertor. CutePDF4 requires it to work. Click <b>Yes</b>, or follow their <a href="#">support instructions</a> to install your own convertor.*</i>   |           |                 |                  |  |                |   |  |
| 3.               | From the BOS <b>System</b> menu, select <b>Properties</b> , then <b>Email</b> .<br><i>*Properties are not used by a HOS.*</i>   |           |                 |                  |  |                |   |  |
| 4.               | Complete the following steps to set up the email account credentials for your business: <ol style="list-style-type: none"> <li>a. Click the <b>Server</b> tab.</li> <li>b. Complete the required option:                         <table border="1" style="width: 100%; margin-top: 10px;"> <thead> <tr> <th style="text-align: left;">If using:</th> <th style="text-align: left;">Then enter the:</th> </tr> </thead> <tbody> <tr> <td>An email service</td> <td><b>Email Server</b> host name.<br/><b>Reply Email</b>, such as your store email, for customers to reply.<br/><b>User Name</b> and <b>Password</b> for the server (these are different to your log in credentials).<br/>Select <b>Use TLS</b> and the <b>Port</b> if the platform requires this for connection.</td> </tr> <tr> <td>An SMTP server</td> <td><b>Email Server</b> host name.<br/><b>Reply Email</b>, such as your store email, for customers to reply.<br/>Select <b>Use TLS</b> and the <b>Port</b> if the platform requires this for connection.</td> </tr> </tbody> </table> </li> <li>c. Click <b>Send Test Email</b> and enter a recipient.</li> <li>d. Review the test results message. If it errors, double-check your credentials are correct with the server provider.</li> </ol> | If using: | Then enter the: | An email service | <b>Email Server</b> host name.<br><b>Reply Email</b> , such as your store email, for customers to reply.<br><b>User Name</b> and <b>Password</b> for the server (these are different to your log in credentials).<br>Select <b>Use TLS</b> and the <b>Port</b> if the platform requires this for connection. | An SMTP server | <b>Email Server</b> host name.<br><b>Reply Email</b> , such as your store email, for customers to reply.<br>Select <b>Use TLS</b> and the <b>Port</b> if the platform requires this for connection. |  |
| If using:        | Then enter the:   |           |                 |                  |  |                |   |  |
| An email service | <b>Email Server</b> host name.<br><b>Reply Email</b> , such as your store email, for customers to reply.<br><b>User Name</b> and <b>Password</b> for the server (these are different to your log in credentials).<br>Select <b>Use TLS</b> and the <b>Port</b> if the platform requires this for connection.  |           |                 |                  |  |                |   |  |
| An SMTP server   | <b>Email Server</b> host name.<br><b>Reply Email</b> , such as your store email, for customers to reply.<br>Select <b>Use TLS</b> and the <b>Port</b> if the platform requires this for connection.   |           |                 |                  |  |                |   |  |



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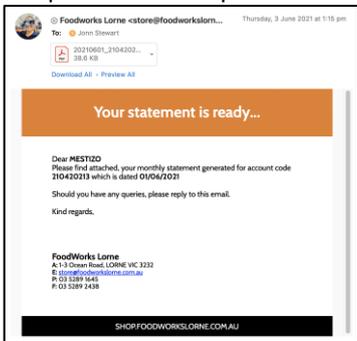
## Hints and Tips

- ✓ Your business can use the default email template, or customise it with your logo and/or custom html to use different fonts, spacing, colours etc to suit your business.

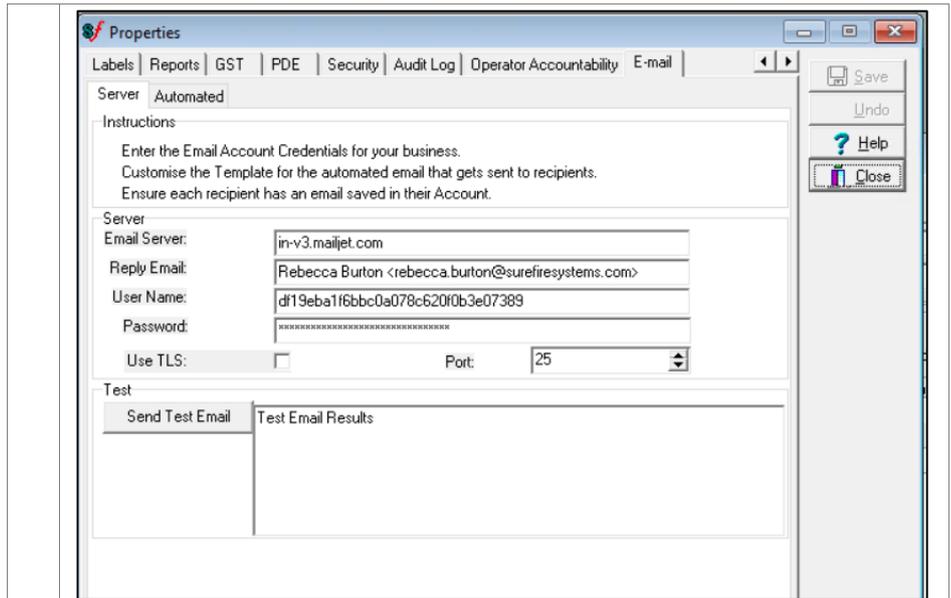
### Sample Default Template



### Sample Custom Template

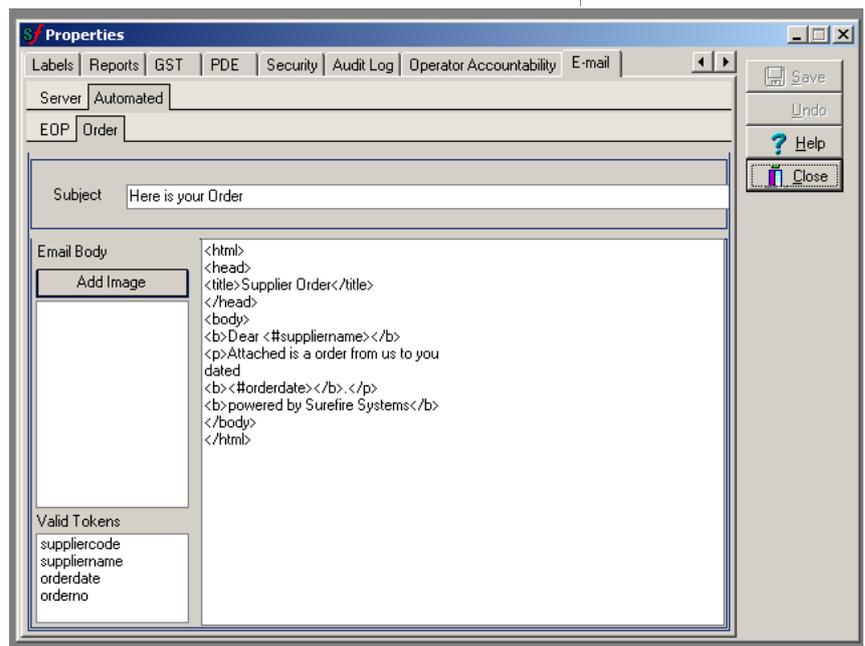


- ✓ **Valid Tokens** are the fields that the html can look up within Surefire, and insert into your email template to customise the text for each customer.
  - Contact Surefire Support if you have other Surefire fields that you would like to insert.



- Complete the following steps to set up the email template/s:
  - Within the **Properties | Email** tab, select the **Automated** tab.
  - Select the template you want to customise; either **EOP** or **Order**.
  - Design the html for the email template; you can insert the **Valid Tokens** as applicable.
  - To add your store logo, click **Add Image**. Browse and select the applicable image. Next, click to highlight the image in the list, then right-click in the html where you want to insert the image, and click **Add Selected Image**.

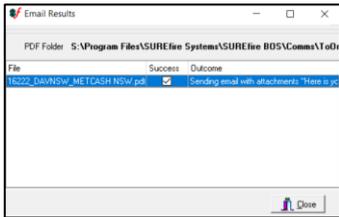
*\*To delete an image from the list, right-click on the file name and click **Delete Image**.\**



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**Hints and Tips**

- ✓ There is no validation that the email is correct, so double-check the entry is correct. Some email servers will send us back an error if an email fails; the system will display the Email Results for you to review, which you can sort by the **Success** status.



- ✓ Do I need a special EOP Customer Group for emailing accounts?
  - No, not if most of your customers have an email. Any accounts that don't have an email saved will have their statement sent to the default printer or PDF'd for you manually issue it to the customer.
  - Yes, if you'd rather keep emailed and non-emailed customers very separate, or you want to use different statement rules or parameters for each customer type.

6. Check that the recipients you want to email have an email saved against their account in Surefire.  
 For Suppliers: go to **Payables | Account | Parameters | Order Email**.  
 For Customers: go to **Receivables | Account | Parameters** tab | **Email**.  
*\*Add multiple emails by separating each with a semi-colon [;].\**  
*\*If a Supplier doesn't have an email, the email option will be greyed out for their order.\**  
*\*If an AR Customer doesn't have an email, their statement will automatically be pushed to the printer or PDF (according to the option you select in the EOP Wizard.)*

7. Optionally complete the following housekeeping for Emailing of EOP Statements:

- Create a shortcut on the desktop to make it easier to navigate to any PDF statements that get generated: S:\Program Files\Surefire Systems\Surefire BOS\Comms\ToEOP.
- Create a new EOP customer group for 'email', and move the applicable customers into the email group. Refer to [TECH-3e-G-BOS-Config-Configure-AR-Account-Statements-Fact-Sheet](#), or, you can add the group from the customer's account record, on the **Parameters** tab.\*

