



## Simple Mail Transfer Protocol SMTP Setup

Megan De Freitas - 2024-11-22 - Setup

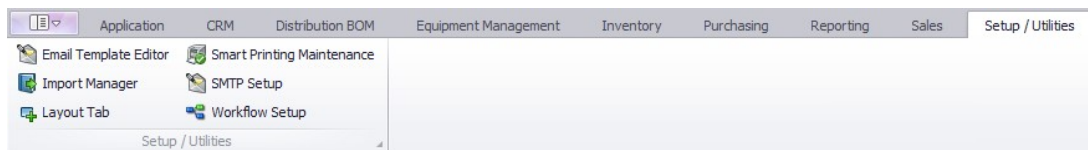
### Overview

The Simple Mail Transfer Protocol (SMTP) Setup form allows users to setup multiple SMTP addresses. Different SMTP configurations can be maintained to be automatically used for specific users or conditionally based on business objects.

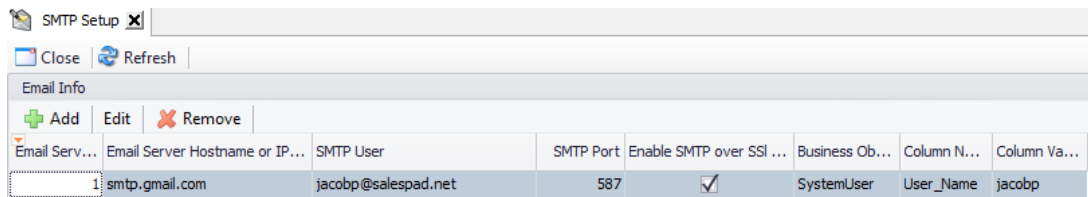
This document also discusses how to enable security for the SMTP Setup form and provides an example of how SMTP addresses can be used to help automate effective business communications.

### Setup

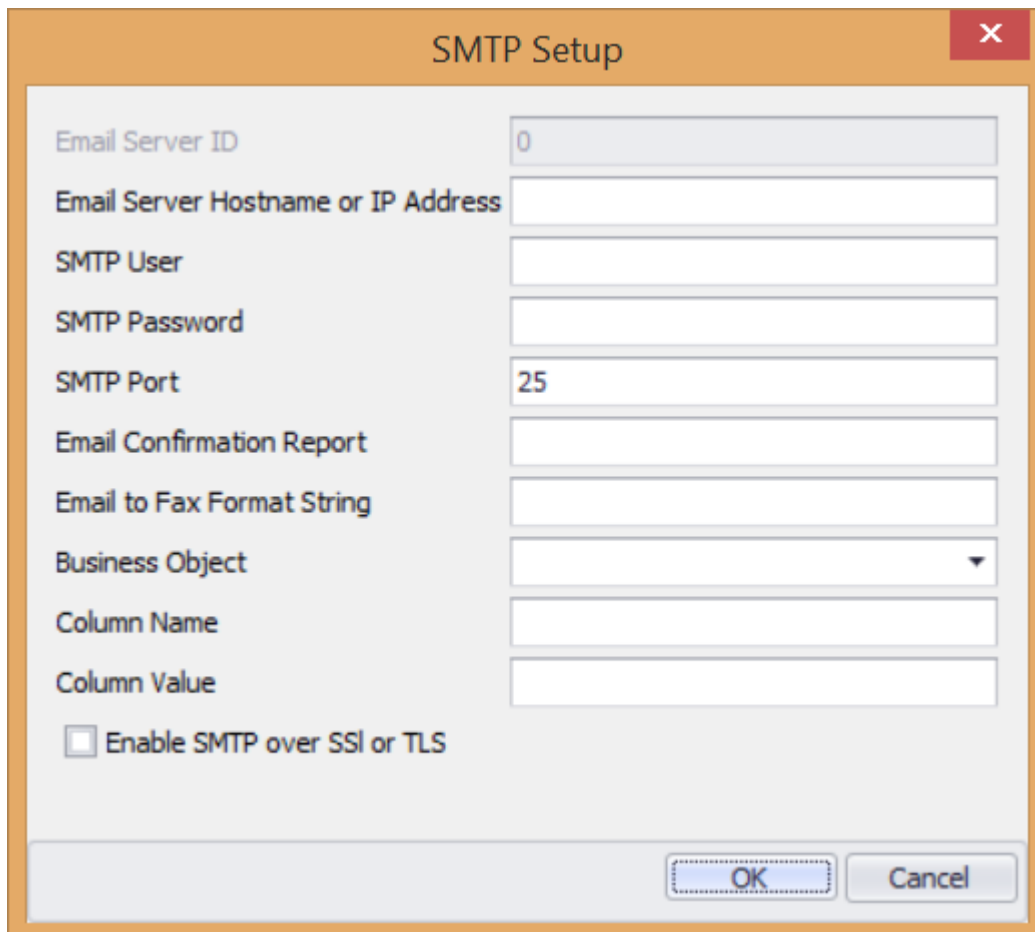
The SMTP Setup form will now be available under the “Setup / Utilities” tab at the top of the window.



To add a new SMTP address, click the “Add” button. To remove or edit an entry that already exists, simply select a row and click the corresponding “Remove” or “Edit” buttons. Below is an example of how the SMTP form would look with two entries.



When the “Add” button is clicked, a separate window will pop up (see below). Enter the desired SMTP information for the new entry into this form and then click the “OK” button to save. By entering a “Business Object” type, “Column Name,” and “Column Value,” SalesPad will automatically use the setup SMTP address whenever any document of this type is emailed from SalesPad. Alternatively, the “Business Object” field can be set to “SystemUser” and the “Column Value” field set to the desired “User ID.” All emails sent from the designated SalesPad user will then use the setup SMTP configuration.



The SMTP Setup dialog box contains the following fields and controls:

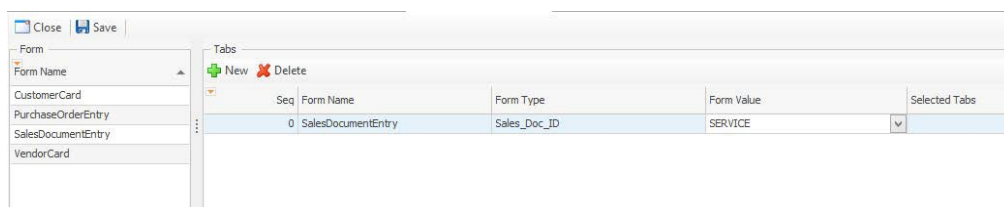
- Email Server ID: 0
- Email Server Hostname or IP Address: [Empty text box]
- SMTP User: [Empty text box]
- SMTP Password: [Empty text box]
- SMTP Port: 25
- Email Confirmation Report: [Empty text box]
- Email to Fax Format String: [Empty text box]
- Business Object: [Empty dropdown menu]
- Column Name: [Empty text box]
- Column Value: [Empty text box]
- ☐ Enable SMTP over SSL or TLS
- Buttons: OK, Cancel

## User

Assume that we have an entry in the SMTP form like the one below. This setup will cause every email sent for a “Sales Document” with a “Sales Doc ID” of “STDORD” coming from SalesPad to use this SMTP information.

Email Serv...	Email Server Hostname or IP...	SMTP User	SMTP Port	Enable SMTP over SSL ...	Business Ob...	Column N...	Column Va...
1	smtp.gmail.com	jacobp@salespad.net	587	<input checked="" type="checkbox"/>	SystemUser	User_Name	jacobp

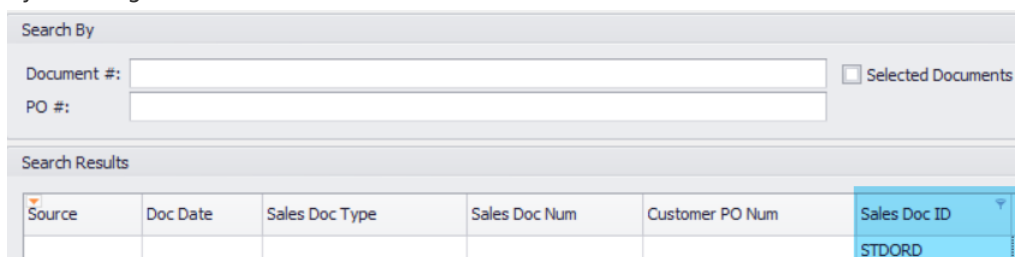
1. Click the “SalesDocuments” button from the “Application” tab to open the Sales Documents search form.



The Sales Documents search form includes a left sidebar with a list of forms: CustomerCard, PurchaseOrderEntry, SalesDocumentEntry, and VendorCard. The main area shows a table with the following data:

Seq	Form Name	Form Type	Form Value	Selected Tabs
0	SalesDocumentEntry	Sales_Doc_ID	SERVICE	[Dropdown arrow]

2. After searching documents, they can be sorted to find all the “STDORD” documents by entering “STDORD” in the “SalesDoc ID” column header.



The Search Results section displays a table with the following columns and data:

Source	Doc Date	Sales Doc Type	Sales Doc Num	Customer PO Num	Sales Doc ID
					STDORD

3. Open any "STDORD" document and click the "Print" button. This will launch a new window.

The screenshot shows the 'Sales Documents' window with the document 'ORDST2252' selected. The 'Document Properties' section is visible, showing details for the document and the customer 'Adam Park Resort'. The 'Document Properties' section includes fields for Document #, Customer #, Cust PO, Req Ship, Ship Method, Whse, Currency, Sales Rep, Sales Terr, Pay Terms, Doc Date, and Created By. Below this, there are tabs for Line Items, Notes, Addresses, Holds, User Fields, Audit, Related Documents, Purchases, Quick Report, FedEx Quote, Email Audit, and Assemblies. The 'Line Items' tab is active, showing a table with columns for Item, Price Level, and Req Ship. The table contains one row for item 'HD-20' with a price level of 'RETAIL' and a required ship date of '4/10/2014'.

Document #	Customer #	Cust PO	Req Ship	Ship Method	Whse	Currency	Sales Rep	Sales Terr	Pay Terms	Doc Date	Created By
ORDST2252	ADAMPARK0001		4/10/2014	GROUND	WAREHOUSE	Z-US\$	GREG E.	TERRITORY 2	NET 30	4/10/2014	charles.rumley

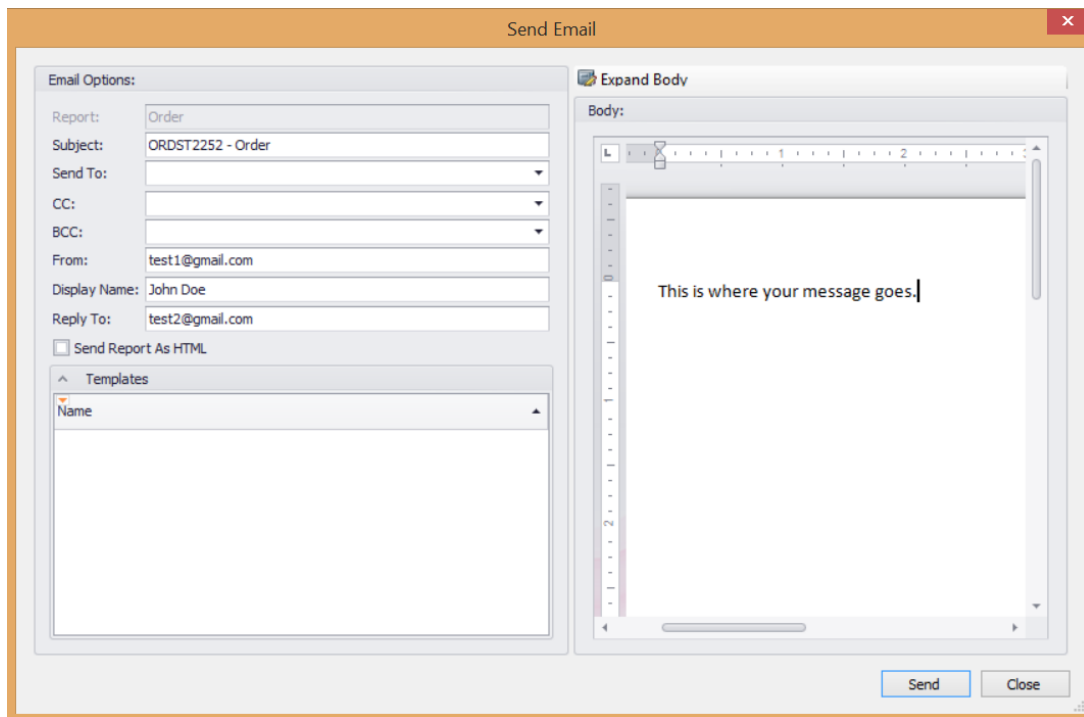
Item	Price Level	Req Ship
HD-20	RETAIL	4/10/2014

4. Select the type of document you wish to attach to the email and click the "Email..." button.

The screenshot shows the 'Printing Sales Document Report' window. It has a title bar with the text 'Printing Sales Document Report' and a close button. The window is divided into two main sections: 'Print Options' on the left and 'Available Reports' on the right. The 'Print Options' section includes buttons for 'Select All', 'Select None', and 'Properties...', as well as checkboxes for 'Collate', 'Close after Print', 'Print as Single Job', 'Email as Single Job', and 'Prevent Changes'. There is also a 'Mark Default Reports' button and a 'Print Attachments' dropdown menu set to 'Print None'. The 'Available Reports' section is a table with columns for 'ReportName', 'Printer', and 'Copies'. It lists various report types, with 'Order' selected. At the bottom of the window, there are buttons for 'Fax...', 'Email...', 'Preview...', 'Print To...', 'Quick Print', and 'Close'.

ReportName	Printer	Copies
<input type="checkbox"/> Copy of Order		
<input type="checkbox"/> Customer RGA		
<input type="checkbox"/> Detailed Packing Slip		
<input type="checkbox"/> Excel Sales Document		
<input type="checkbox"/> Internal RGA		
<input type="checkbox"/> Invoice		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Order Confirmation		
<input type="checkbox"/> Packing Slip		
<input type="checkbox"/> Picking Ticket		
<input type="checkbox"/> Quote		
<input type="checkbox"/> Return		
<input type="checkbox"/> Sales/Word Document		
<input type="checkbox"/> Summary Packing Slip		

The "Email..." button will launch the "Send Email" window. Since the SMTP information entered for all "STDORD" documents will be used, the "From:" field will not be used. Instead, the email will be from whatever the "SMTP User" email entered on the "SMTP Setup" form is. However, the "Display Name:" and "Reply To:" fields will display whatever information is entered here. This system will work similarly for "Smart Printing" emails, "Sales Document Mass Update" emails, and "Purchase Order Generation" emails.



The image shows a "Send Email" dialog box with an orange title bar. It is divided into two main sections. The left section, titled "Email Options:", contains fields for "Report:" (set to "Order"), "Subject:" (set to "ORDST2252 - Order"), "Send To:", "CC:", "BCC:", "From:" (set to "test1@gmail.com"), "Display Name:" (set to "John Doe"), and "Reply To:" (set to "test2@gmail.com"). There is a checkbox for "Send Report As HTML" which is currently unchecked. Below these fields is a "Templates" section with a list box containing a single entry "Name". The right section, titled "Expand Body", contains a large text area labeled "Body:" with the placeholder text "This is where your message goes." and a vertical scrollbar. At the bottom right of the dialog are "Send" and "Close" buttons.

Send Email

Email Options:

Report: Order

Subject: ORDST2252 - Order

Send To:

CC:

BCC:

From: test1@gmail.com

Display Name: John Doe

Reply To: test2@gmail.com

☐ Send Report As HTML

Templates

Name

Expand Body

Body:

This is where your message goes.

Send Close

This system will work similarly for "Smart Printing" emails, "Sales Document Mass Update" emails, and "Purchase Order Generation" emails.

### Security

*SMTP Setup* - Allows users to open the SMTP Setup Module.