agrē EMAIL DEFAULTS

The ability to send reports from the agrē emailer is a convenience for our retailers that do not have their own email server. Emails are relayed from Tronia's mail server and are "spoofed" (pretend to come from you) which may require your customers to whitelist the sender. Retailers with established email systems maybe need to add Tronia's email server to their own internet DNS SPF records.

You can setup a Custom Emailer to use your own email server (this will avoid spoofing issues as the emails really are coming from you). A custom emailer can be setup for on-Premises email servers (like Microsoft Exchange) or cloud based email servers (like Microsoft 365, Gmail, etc.). Custom server settings require you to enter your company email server address (so you will need to know what it is!), and email account/password for each user. Your users will need make sure their account settings are kept current and must make updates when their passwords change.
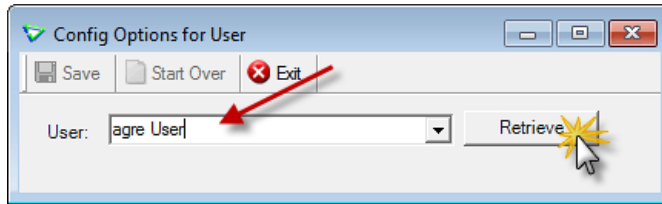
What you'll find:

User-Level Config Options

User Config Options allow a user to specify a "From" address (address from whom their emails are sent) in addition to selecting through which server to route them. Default text for the message body, and a naming convention for attached report files, can also be configured.
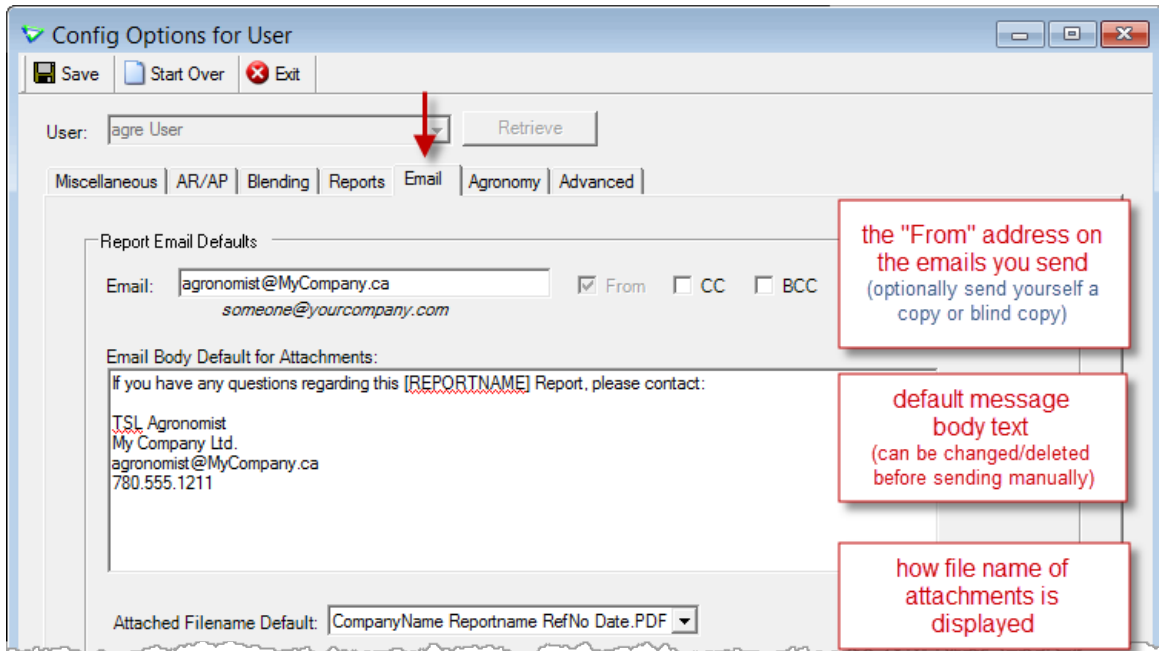
Whether using agrē's emailer or your company mail server, each user should at least setup their own "From" addresses.

From the dropdown select the user you want to configure and click *Retrieve*.

File > Config Options > User

On the *Email* tab, enter the Email "from address", any default body text, and select a report naming convention.

These *Report Email Defaults* apply no matter which Default Emailer is selected.

Select the *Default Emailer*.

agrē

Selecting **agrē** uses Tronia's server and relays emails through the internet to the recipient. No additional information is required.

Custom

Selecting **Custom** will route agrē emails through the mail server of your choosing.
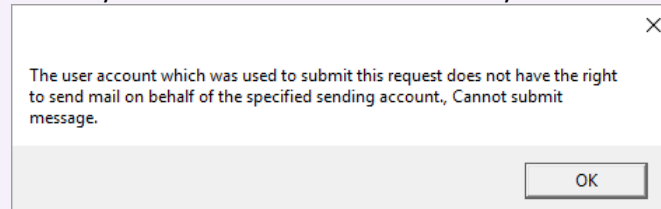
When using your company email server, your company email details must be entered.

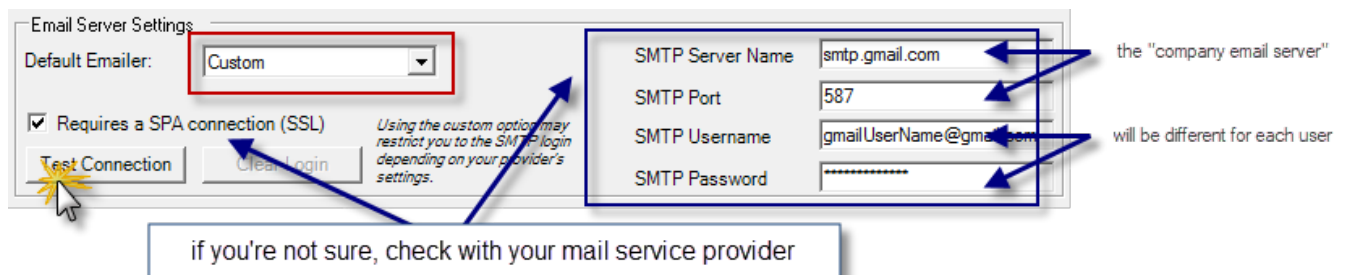*Test Connection* will send a test message to verify the settings are correct.

Tip	**Emailed reports are sent from** address may need to match *exactly* the **SMTP User Name** (server-dependent)
	You may see an error similar to this if they don't

Example Gmail settings:

Caution	selecting a different Default Emailer will **clear all Custom settings**. If you are editing and accidentally choose another, *Exit* without saving.

Microsoft 365

Example Microsoft 365 settings:

Prompts user to login on sending of email; login credentials are preserved for up to 60 days
Clear Login *clears the authentication token requiring logging in again next time an email is sent*

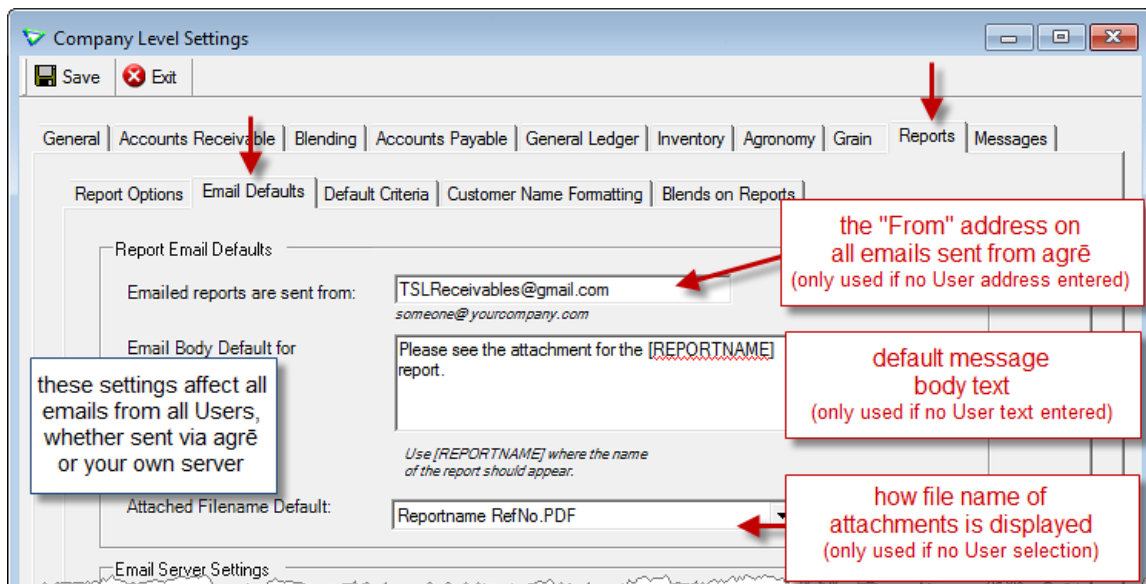# SendGrid

Example SendGrid settings:

Company Config Options

You can specify company email settings that will be used by default unless overridden by User config options.

> **Note:** The Company *Emailed reports are sent from* address will be used only if a User has forgotten to setup their own *From* address.
>
> If both the User from address and Company from address are blank, emails cannot be sent from agrē.

On the *Email Defaults* sub-tab, enter the "From" address, any default body text, and select a report naming convention.

File > Config Options > Company

You have the same *Default Emailer* options.

agrē

Selecting **agrē** uses Tronia's server and relays emails through the internet to the recipient. No additional information is required.

Custom

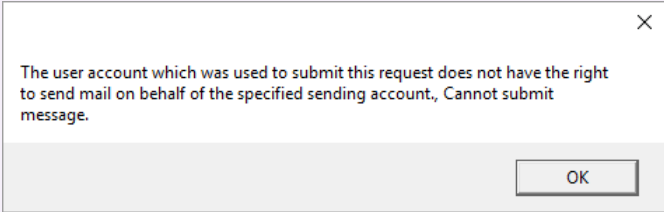Selecting **Custom** will route agrē emails through the mail server of your choosing.

When using your company email server, your company email details must be entered.

Test Connection will send a test message to verify the settings are correct.

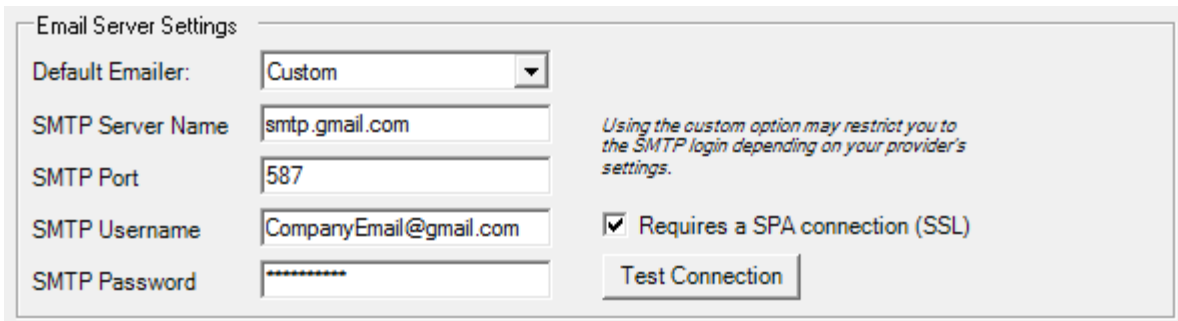| Tip	**Emailed reports are sent from** address may need to match *exactly* the **SMTP User Name** (server-dependent)
	You may see an error similar to this if they don't

The user account which was used to submit this request does not have the right to send mail on behalf of the specified sending account., Cannot submit message.

OK

Example GMail settings:

Email Server Settings

Default Emailer: Custom

SMTP Server Name: smtp.gmail.com

SMTP Port: 587

SMTP Username: CompanyEmail@gmail.com

SMTP Password: ***********

Using the custom option may restrict you to the SMTP login depending on your provider's settings.

☑ Requires a SPA connection (SSL)

Test Connection

Caution	selecting a different Default Emailer will **clear all Custom settings**. If you are editing and accidentally choose another, *Exit* **without saving**.

Microsoft 365

Example Microsoft 365 settings:

Prompts to users login on sending of email; login credentials are preserved for up to 60 days
Clear Login *(under User Config Options) clears the authentication token*
requiring logging in again next time an email is sent

SendGrid

Example SendGrid settings:

Note:	If you have any questions or require further assistance with the **agrē Emailer**, please contact your CSC at support@tronia.com.