

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:

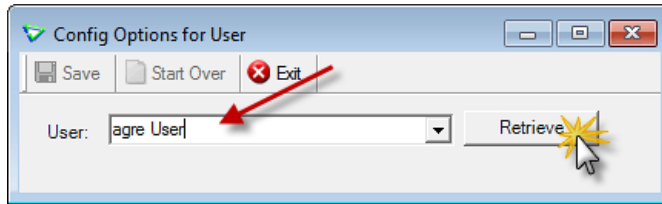
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User-Level Config Options

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.

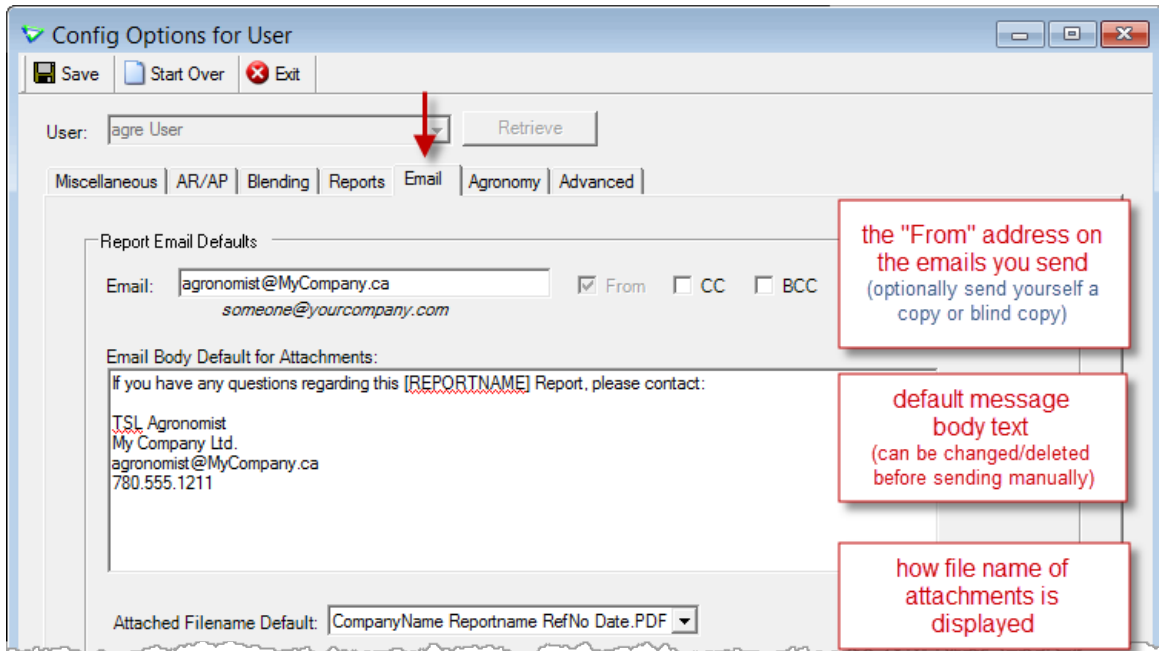
Whether using agrē’s emailer or your company mail server, each user should at least setup their own “From” addresses.

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.



The screenshot shows the 'Email Server Settings' dialog box. The 'Default Emitter' dropdown menu is set to 'agrē' and is highlighted with a red box. To the right, there are input fields for 'SMTP Server Name', 'SMTP Port', 'SMTP Username', and 'SMTP Password', all of which are currently empty. A checkbox labeled 'Requires a SPA connection (SSL)' is unchecked. A 'Test Connection' button is located at the bottom left.

Custom

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

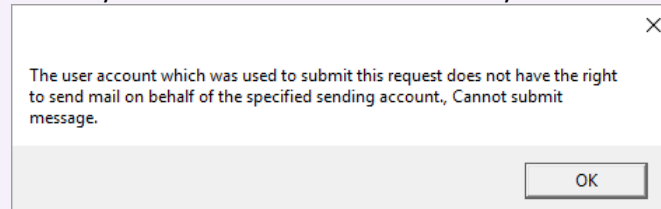
When using your company email server, your company email details must be entered.

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

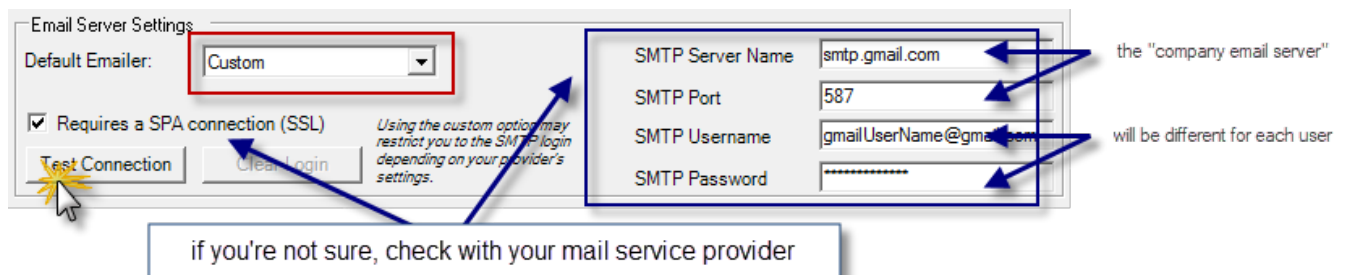
Tip

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:



The screenshot shows the 'Email Server Settings' dialog box with 'Custom' selected in the 'Default Emitter' dropdown. The 'Requires a SPA connection (SSL)' checkbox is checked. The 'SMTP Server Name' is 'smtp.gmail.com', 'SMTP Port' is '587', 'SMTP Username' is 'gmailUserName@gmail.com', and 'SMTP Password' is masked with asterisks. Blue arrows point from text labels to these fields: 'the "company email server"' points to the SMTP Server Name, 'will be different for each user' points to the SMTP Username, and 'if you're not sure, check with your mail service provider' points to the SMTP Password field. A 'Test Connection' button is highlighted with a yellow starburst icon.

Caution

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

Microsoft 365

Example Microsoft 365 settings:

Email Server Settings	
Default Emitter:	Microsoft 365
<input type="checkbox"/> Requires a SPA connection (SSL)	<i>Microsoft 365 Credentials will be required for the initial email. After which you will not need to login for up to 60 days.</i>
Test Connection	Clear Login
SMTP Server Name	
SMTP Port	
SMTP Username	
SMTP Password	

*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:

Email Server Settings	
Default Emitter:	SendGrid
<input type="checkbox"/> Requires a SPA connection (SSL)	<i>SendGrid username is typically apiKey. The email used for testing is the above email for reports.</i>
Test Connection	Clear Login
SMTP Server Name	
SMTP Port	
Username	apiKey
API Key	xx

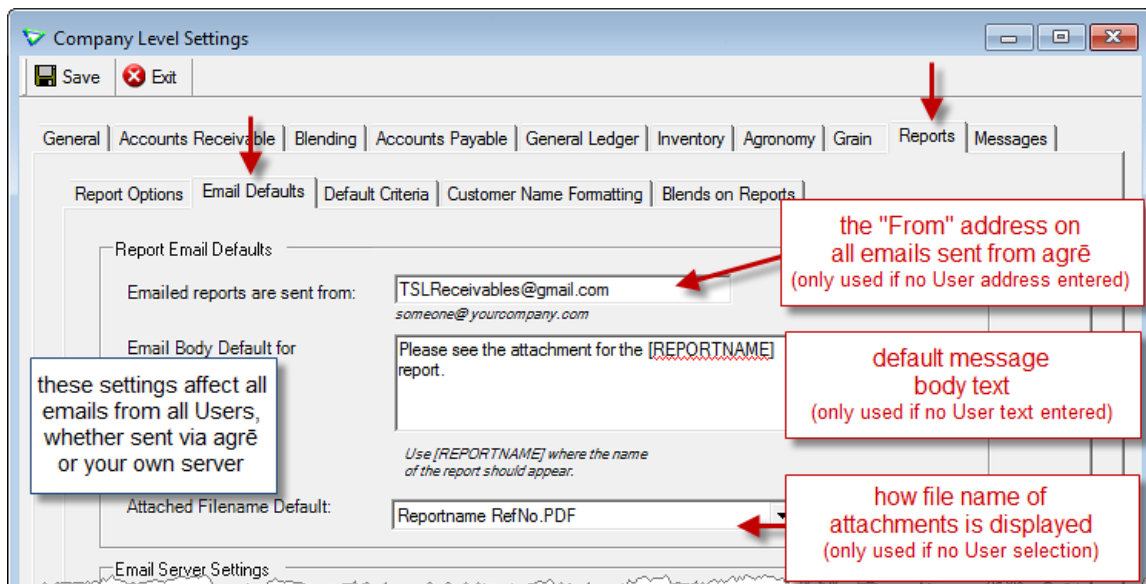
Company Config Options

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 Mailer** 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.

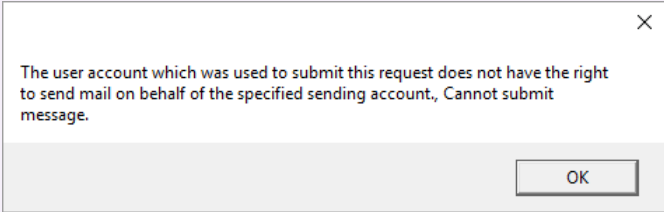
When using your company email server, your company email details must be entered.

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)

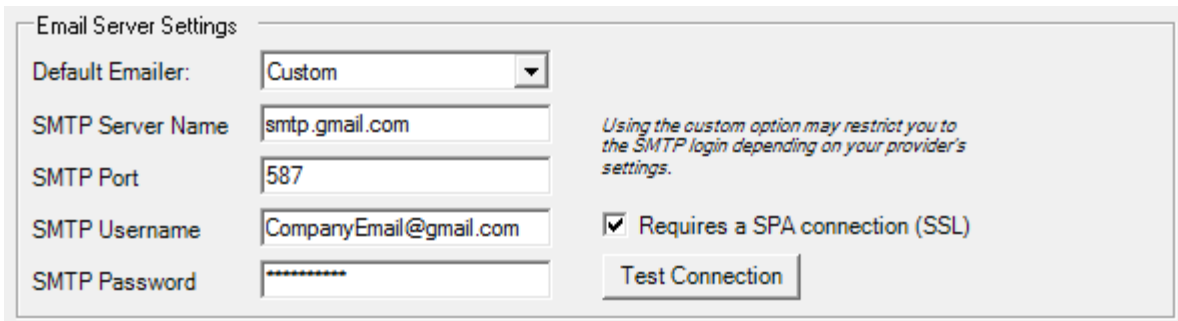
You may see an error similar to this if they don't



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: *****

Requires a SPA connection (SSL)

Test Connection

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

Email Server Settings	
Default EMailer:	Microsoft 365
SMTP Server Name	
SMTP Port	
SMTP Username	
SMTP Password	
	<i>Microsoft 365 Credentials will be required for the initial email. After which you will not need to login for up to 60 days.</i>
	<input checked="" type="checkbox"/> Requires a SPA connection (SSL)
	Test Connection

*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:

Email Server Settings	
Default EMailer:	SendGrid
SMTP Server Name	smtp.sendgrid.net
SMTP Port	465
Username	apikey
API Key	xx
	<i>SendGrid username is typically apiKey. The email used for testing is the above email for reports.</i>
	<input type="checkbox"/> Requires a SPA connection (SSL)
	Test Connection

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