



E-mailing in Triumph 5

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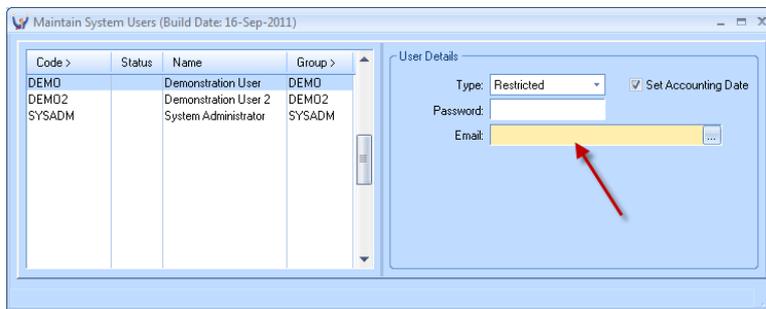
1. Introduction

In Triumph 5 forms may be e-mailed by the Simple Mail Transfer Protocol (SMTP) or the Messaging Application Programming Interface (MAPI). This allows Triumph to either e-mail simply using MAPI via Microsoft Outlook which is the default or handle more advanced e-mailing via SMTP, including via the cloud like gmail or other internet based e-mail.

2. General Setup

2.1. Triumph User E-mail Address

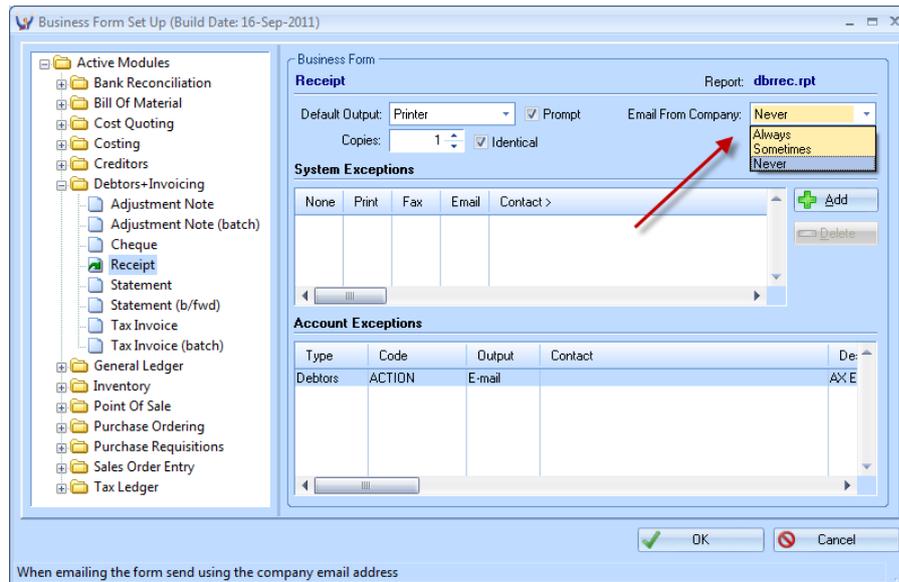
To e-mail forms out of Triumph 5, the users e-mail addresses must be entered first. This is setup in the Maintain System Users^(S-M-U) option.



If you login as a user without an e-mail address, e-mailing will be off.

2.2. E-mails Forms From Company E-mail Address

Forms may also be e-mailed out of Triumph from the user's e-mail address or the company e-mail address, this is setup in the Business Form Set Up^(S-U-F) option.



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Forms may be e-mailed from the company;

- **Always** – e-mailed forms will always be from the company e-mail address
- **Sometimes** – multiple/range e-mailed forms will be from the company e-mail address i.e. a debtor statement run, while a single form will be from the user e-mail address
- **Never** – e-mailed forms will always be from the user e-mail address

The company e-mail address is setup in System Control Maintenance^(S-S-S-S) and may also be setup in Maintain Division Details^(S-S-S-D) in a multi-division company. In a multi-division company, e-mails from the company will use the e-mail address of the current working division. If the address has not been filled out the form will not be e-mailed out.

Please note that if you're using the MAPI interface, Microsoft Exchange is required and Exchange must be turned on, see section 3. MAPI for more details.

2.3. Auditing E-mails

In Triumph 5 you may keep an audit of all e-mails out of Triumph, this is done by recording an audit e-mail address where e-mails from Triumph will be BCC'ed to.

This is available for both MAPI and SMTP, see the relevant sections below for the more details on the setup.

3. MAPI

This is the default method for e-mailing out of Triumph 5. It requires you to have Microsoft Outlook installed on your computer. The supported versions of Microsoft Outlook are 2003, 2007 and 2010 including the 64bit version.

MAPI is setup in the triumph.ini configuration file in its own MAPI section and allows the following values to be set;

Setting	Description
Exchange	Allows e-mailing out of Triumph to use a different from address than that of the current windows user's default address and requires Microsoft Exchange. This setting is always required.
AuditBccName	The name of the account for the audit e-mail address.
AuditBccAddress	The e-mail address of the account for the audit e-mail address.

4. SMTP

SMTP e-mailing is used for mail systems other than Outlook. It is also setup in the triumph.ini configuration file under the section SMTP and allows the following values to be set;

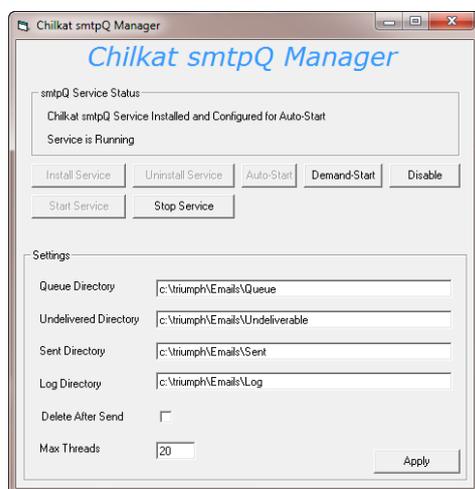
Setting	Description
AuthMethod	This property is usually left empty, the SMTP manager will be default choose the most secure login method. However some SMTP servers may not advertise the acceptable authorization method and therefore can't be defaulted, in these cases the authorization method may be set to one of the following; <ul style="list-style-type: none">• NONE• LOGIN• PLAIN• CRAM-MD5• NTLM
Host	The domain name of the SMTP server. Do not include "http://" in the domain name.

	This property may also be set to an IP address string, such as "168.144.70.227". Both IPv4 and IPv6 address formats are supported.
Port	The port number of the SMTP server used to send e-mail. When this is -1, which is the default, the default port setting will be used.
CharSet	This should be set to iso-8859-1
Username	In many cases, an SMTP server will not require authentication when sending to an email address local to its domain. However, when sending email to an external domain, authentication is required
Password	The password for logging into the SMTP server. Use this only if your SMTP server requires authentication. If NTLM (Windows-Integrated) authentication is used, the SmtplibUsername and SmtplibPassword properties may be set to the string "default" to cause the component to use the current logged-on credentials (of the calling process) for authentication.
QueueMail	Set to 1 to turn on e-mail queuing or 0 to turn off
QueueFolder	The folder the e-mails will be stored when e-mail queuing is turned on
AuditBccName	The name of the account for the audit e-mail address.
AuditBccAddress	The e-mail address of the account for the audit e-mail address.

In most cases only the Host is required to send e-mails via SMTP. The only parts that should need changing are the queuing and e-mail audit settings.

4.1. Queuing

The SMTP e-mailing method also has the ability to queue the outgoing mail to a central folder, this is the recommended way when e-mailing when using SMTP. The queuing service is installed on one machine and all the Triumph workstations then point to a shared folder on the network, which the queuing service watches and sends out e-mails as they are saved in the folder.



Features

- The queue service is multi-threaded and can be configured to run as many concurrent threads for sending as you desire.
- You can set the directories where emails are queued, saved, and where errors are reported.
- You can opt to delete emails after sending.
- Allows you to configure the service to auto-start when the computer is booted.
- Installing and uninstalling the service is easy.
- The queue service will run under the default System Account, but you can use the standard Windows Management snap-ins to configure the service to run under any account.

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The benefits are only one machine needs access to the SMTP server and any problems during e-mailing are logged.

4.2. B2B

When using the B2B eCommerce module the e-mailing is always handled via SMTP and requires an SMTP section be setup triumph.ini configuration file. The B2B e-mail settings are stored in their own B2B-OE section separately for each company in it's triumph.ini configuration file, and allows the following settings;

Setting	Description
SubjectMask	Set the e-mail subject mask, which may also include the following tokens; <ul style="list-style-type: none">• %d – the date the form was sent• %t – the time the form was sent• %f – the file of the form, i.e. oerqte.rpt• %n – the name of the form, i.e. Sales Quote• %a – the customer account name• %r – the transaction reference
ExternalEmailRequired	Should a copy of the internet quote be e-mailed to the customer
ExternalFromName	E-mail account name the internet quote is sent from to the customer
ExternalFromAddress	E-mail address the internet quote is sent from to the customer
InternalEmailRequired	Should an internal copy of the internet quote be e-mailed
InternalFromName	E-mail account name the internet quote is sent from to the internal contact
InternalFromAddress	E-mail address the internet quote is sent from to the internal contact
InternalToName	Internal contact name to receive a copy of the internet quote
InternalToAddress	Internal contact e-mail address to receive a copy of the internet quote
InternalEmailRequired2	Should a second internal copy of the internet quote be e-mailed
InternalFromName2	E-mail account name the internet quote is sent from to the second internal contact
InternalFromAddress2	E-mail address the internet quote is sent from to the second internal contact
InternalToName2	Second internal contact name to receive a copy of the internet quote
InternalToAddress2	Second internal contact e-mail address to receive a copy of the internet quote
InternalEmailRequired3	Should a third internal copy of the internet quote be e-mailed
InternalFromName3	E-mail account name the internet quote is sent from to the third internal contact
InternalFromAddress3	E-mail address the internet quote is sent from to the third internal contact
InternalToName3	Third internal contact name to receive a copy of the internet quote
InternalToAddress3	Third internal contact e-mail address to receive a copy of the internet quote

5. Precedence

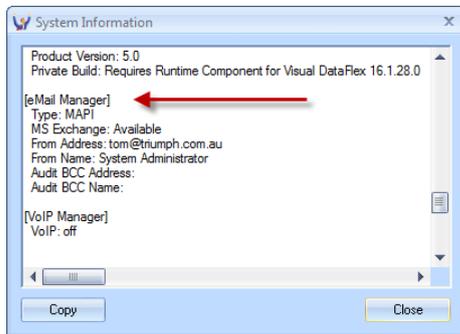
As stated the e-mail settings for Triumph are setup in the triumph.ini configuration file. The e-mailing settings may setup on site-wide basis in the triumph.ini in the library folder or for a specific company in its triumph.ini in the company folder.

E-mail settings in the company triumph.ini will take precedence over the settings in the library triumph.ini. When the same triumph.ini has a MAPI and SMTP section, MAPI will take precedence over SMTP. For example you may setup the library triumph.ini with MAPI, and one company triumph.ini with SMTP. That one company would e-mail out using SMTP while the rest would use MAPI. You may want different companies to have different e-mail audit addresses, again you place a mail section in company triumph.ini to achieve this.

Please note if you add an e-mail section to company triumph.ini you to add the full section with all its settings, it will not default any missing settings from the library triumph.ini.

6. Troubleshooting

When logging into Triumph you can check if there are any problems by going to Help on the menu, then About and then clicking the System Info button. In the Triumph system details dialog locate the e-mail section.

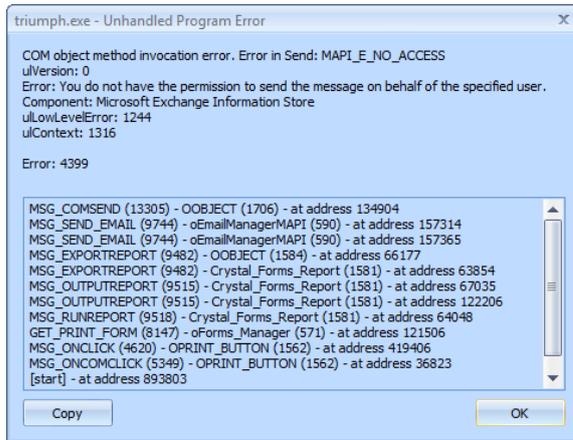


Most problems with the e-mail setup would be listed here;

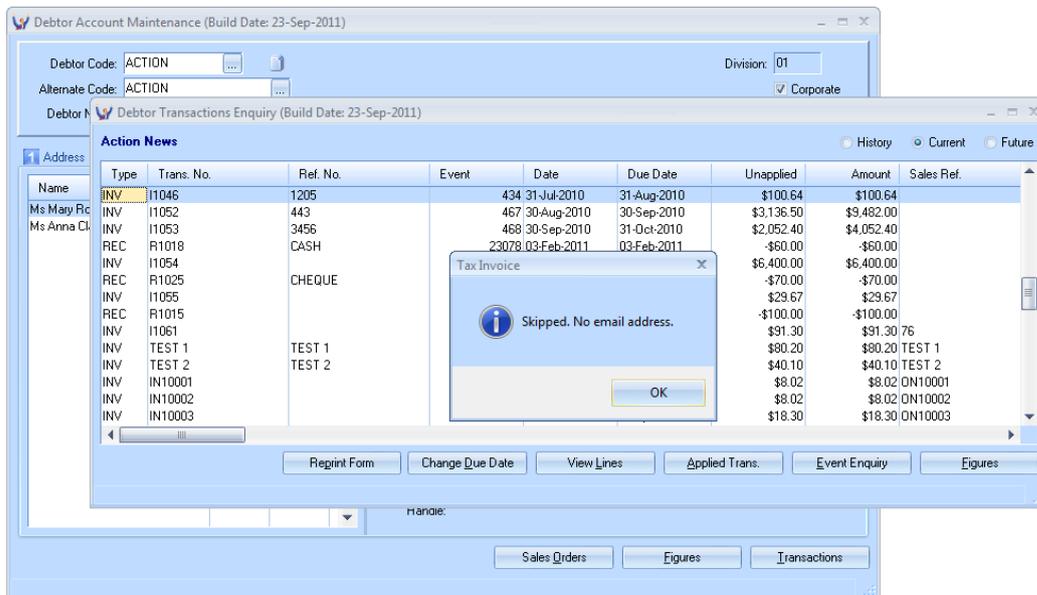
Problem	Description	Resolution
Emailing: off	<ol style="list-style-type: none"> No e-mail section found in triumph.ini configuration file E-mail not setup on Triumph user 	<ol style="list-style-type: none"> Add an e-mail section to the triumph.ini configuration file Enter the e-mail address on the user
MAPI: Outlook is not installed.	E-mail is set as MAPI but Microsoft Outlook is not installed	Installed Microsoft Outlook or user SMTP to e-mail out of Triumph
MAPI-64: Triumph EMail program not found	The version of Microsoft on this workstation is 64bit and requires an intermediate program to e-mail through which can't be found	The program is Triumph-EMAPI.exe and should be in the Programs under the main Triumph folder. Contact your Triumph support consultant for further help
SMTP: Queue folder does not exist.	Queuing has been turned on but the entered queue folder is incorrect	Correct the QueueFolder setting in the triumph.ini configuration folder
SMTP: Queue folder is not defined.	Queuing has been turned on but the queue folder has not been entered	Set up SMTP queuing and its folders or turn queuing off
SMTP: Login failed.	The entered login details for the username and password are incorrect	Enter the correct login details, or don't set them if they are not needed which is the default
SMTP: Connect failed.	Could not connect to the SMTP server	Check the Host has been filled out correctly in the triumph.ini configuration file and that you have network access to it
SMTP: Email host is not defined.	The SMTP server has not been entered	Enter the Host in the triumph.ini configuration file

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Other errors you might see when running Triumph include;

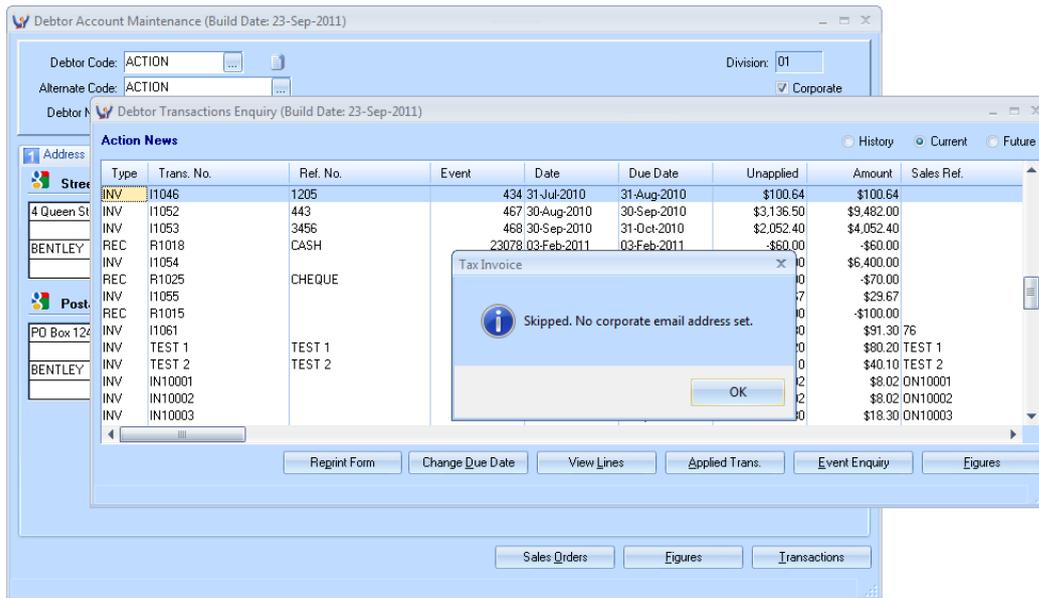


These are standard MAPI type errors, normally with a decent description of the error. In this case the e-mail is being sent from an e-mail address the triumph user doesn't have access to, you would need to contact your network administration to correct this type of problem.



E-mailing the invoice was skipped as the debtor's primary account contact didn't have an e-mail address setup.

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E-mailing the invoice was skipped as the invoice is setup to e-mail from the company e-mail address and it has not been setup.

7. Triumph Configuration File Examples

The following are examples of the e-mail sections in the triumph.ini configuration and how they can be filled out, the items highlighted in blue are optional or will be defaulted.

7.1. MAPI

```
[MAPI]
Exchange=0
AuditBccName=Company Accounts
AuditBccAddress=accounts@company.com.au
```

7.2. SMTP

```
[SMTP]
AuthMethod=
Host=mail.server.com.au
Port=-1
CharSet=iso-8859-1
Username=
Password=
QueueMail=1
QueueFolder=C:\triumph\e-mails\queue
AuditBccName=Company Accounts
AuditBccAddress=accounts@company.com.au
```

7.3. B2B

```
[B2B-OE]
SubjectMask=%n: %r
ExternalEmailRequired=1
ExternalFromName=Company Accounts
ExternalFromAddress=accounts@company.com.au
InternalEmailRequired=1
InternalFromName=B2B Server
InternalFromAddress=B2B@company.com.au
InternalToName=Company Accounts
InternalToEmail=accounts@company.com.au
InternalEmailRequired2=1
InternalFromName2=B2B Server
InternalFromAddress2=B2B@company.com.au
InternalToName2=Company Storeroom
InternalToEmail2=stores@company.com.au
InternalEmailRequired3=1
InternalFromName3=
InternalFromAddress3=
InternalToName3=
InternalToEmail3=
```