

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.

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Note:	If you have any questions or require further assistance with the agrē Emailer , please contact your CSC at support@tronia.com .
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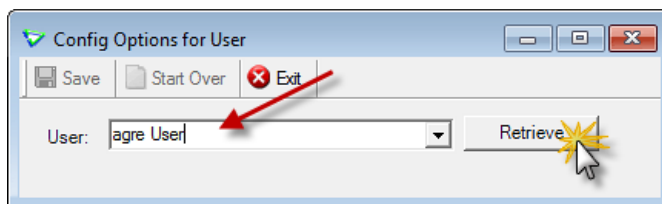
Tip:	The User Email Activity Audit/Admin data export list all emails sent by agrē.
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User-Level Config Options

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. These settings override those set at the [company level](#).

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

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



File > Config Options > User

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

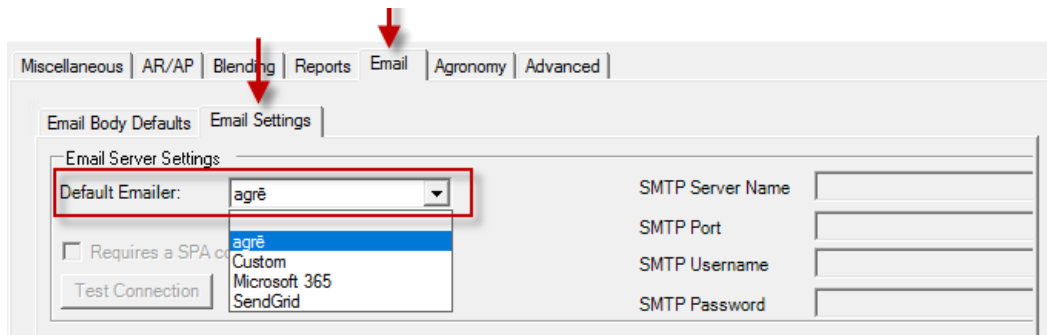
the "From" address on the emails you send (optionally send yourself a copy or blind copy)

generic default body text (overrides system default body text, can be changed/deleted before sending manually)

transaction default body text (overrides Default Body Text, can be changed/deleted before sending manually) (optionally CC/BCC additional email addresses)

how file name of attached report is displayed (several options)

Select your **Default Emler**.

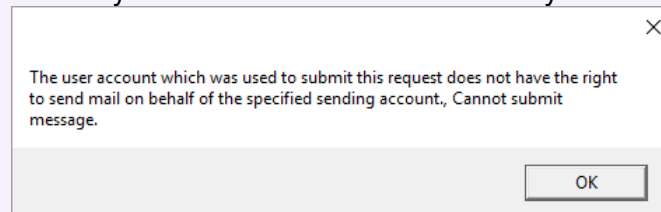


The screenshot shows the 'Email Settings' tab in a software interface. The 'Default Emler' dropdown menu is open, showing options: 'agrē', 'Custom', 'Microsoft 365', and 'SendGrid'. The 'agrē' option is currently selected. To the right of the dropdown are fields for 'SMTP Server Name', 'SMTP Port', 'SMTP Username', and 'SMTP Password'. A red arrow points to the 'Email' tab, and another red arrow points to the 'Default Emler' dropdown.

Tip

Emailed reports “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



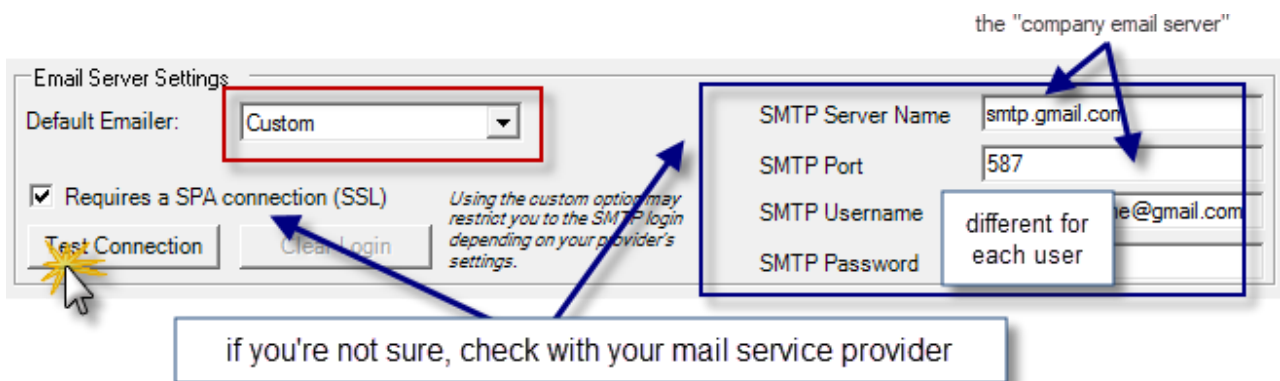
Custom

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.

Example Gmail settings:



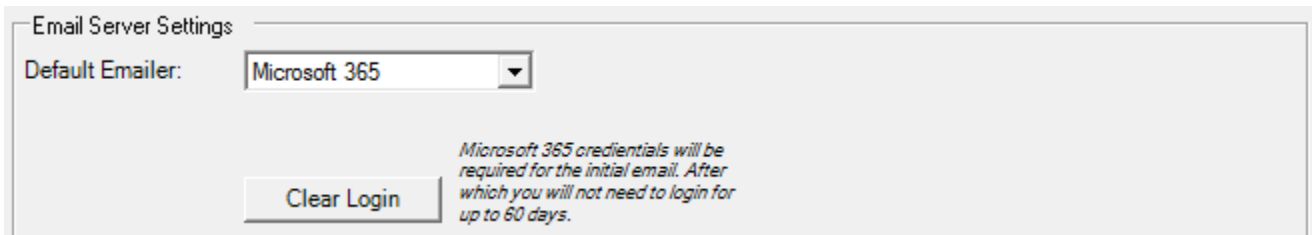
The screenshot shows the 'Email Server Settings' window with 'Custom' selected in the 'Default Emler' dropdown. The 'Requires a SPA connection (SSL)' checkbox is checked. The 'Test Connection' button is highlighted with a yellow starburst. Annotations include: a blue box around the SMTP settings fields (SMTP Server Name: smtp.gmail.com, SMTP Port: 587, SMTP Username: [redacted]@gmail.com, SMTP Password: [redacted]) with an arrow pointing to it from the text 'the "company email server"'; a blue box around the 'Test Connection' button with an arrow pointing to it from the text 'if you're not sure, check with your mail service provider'; and a blue box around the 'SMTP Username' field with an arrow pointing to it from the text 'different for each user'. A note states: 'Using the custom option may restrict you to the SMTP login depending on your provider's settings.'

Caution

selecting a different Default Emler will **clear all Custom settings**. If you are editing and accidentally choose another, **Exit without saving** to avoid losing your data.

Microsoft 365

Example Microsoft 365 settings:

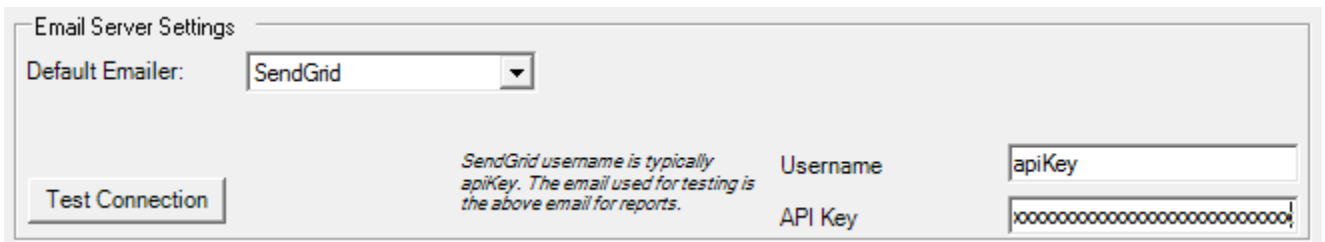


The screenshot shows the 'Email Server Settings' section. The 'Default Emitter' dropdown is set to 'Microsoft 365'. Below this, there is a 'Clear Login' button and a note: 'Microsoft 365 credentials will be required for the initial email. After which you will not need to login for up to 60 days.'

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

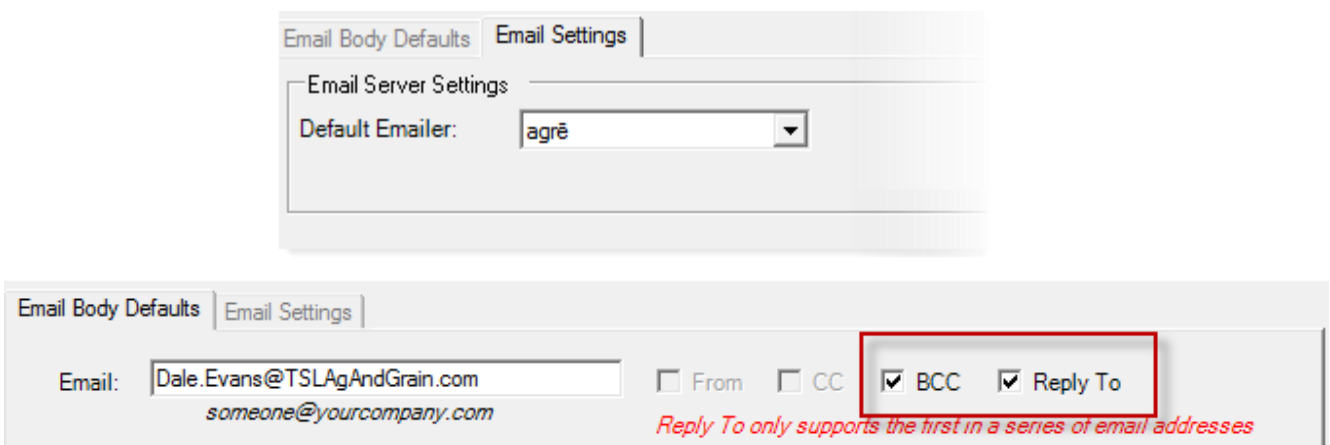
Example SendGrid settings:



The screenshot shows the 'Email Server Settings' section. The 'Default Emitter' dropdown is set to 'SendGrid'. Below this, there is a 'Test Connection' button and a note: 'SendGrid username is typically apiKey. The email used for testing is the above email for reports.' To the right, there are input fields for 'Username' (containing 'apiKey') and 'API Key' (containing a long string of 'x' characters).

agrē

Selecting **agrē** uses Tronia's server to relay emails through the internet to the recipient. All email sent will be from **[your company]-mailer@tronia.com** but you can set the User Config **Reply To** address to your own.



The screenshot shows the 'Email Body Defaults' and 'Email Settings' tabs. The 'Email Server Settings' section has the 'Default Emitter' dropdown set to 'agrē'. Below this, there is an 'Email' input field with the text 'Dale.Evans@TSLAgAndGrain.com' and 'someone@yourcompany.com'. To the right, there are checkboxes for 'From', 'CC', 'BCC', and 'Reply To'. The 'BCC' and 'Reply To' checkboxes are checked and highlighted with a red box. Below the checkboxes, there is a note: 'Reply To only supports the first in a series of email addresses'.

Please talk to your CSC before choosing this option.

Company Config Options

You can specify company email settings that will be used by default by all user unless overridden by their individual [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**.

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

Company Level Settings

Save Exit

General Accounts Receivable Blending Accounts Payable General Ledger Inventory Agronomy Grain Reports Messages

Report Options Email Defaults Default Criteria Customer Name Formatting Blends on Reports

Email Body Defaults Email Settings

Emailed reports are sent from:

Email Body Default for Attachments

Default Email Body

Attached is your [REPORTNAME] Report [REFNO].
Please contact your Sales Rep if you have any questions.
TSL Ag & Grain
Campbell Business Park
St. Albert, AB T8N 7L1

Invoice
[Edit](#)
Your invoice [REFNO] is attached.
Please contact your Sales Rep if you have any questions.
CC/BCC

Work Order
[Edit](#)
CC/BCC

Purchase Order
[Edit](#)
Attached is our order [REFNO].
Please contact Accounts Payable if you have any questions.
CC/BCC

Loadout Ticket
[Edit](#)
CC/BCC

Quote
[Edit](#)
CC/BCC

Use [REPORTNAME] where the name of the report should appear.
Use [REFNO] to show the reference number. Not supported by batch versions.

Attached Filename Default:

Address Book
[Manage](#)

company address book

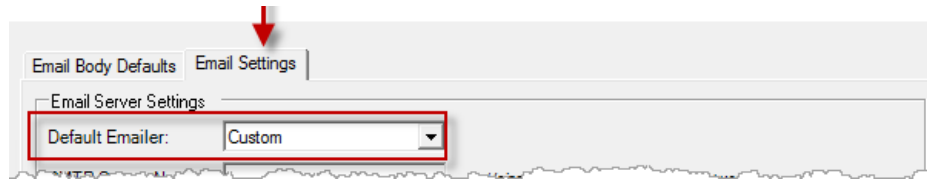
the "From" address on all emails sent from agrē (used only if no User address entered)

default message body text (used only if no User text entered)
(optionally CC/BCC additional email addresses)

how file name of attachments is displayed (used only if no User selection)

File > Config Options > Company

You have the same **Default Emler** options.



The screenshot shows the 'Email Settings' tab in a configuration window. A red arrow points to the 'Email Settings' tab. Below it, the 'Email Server Settings' section is visible. The 'Default Emler' dropdown menu is highlighted with a red box and is set to 'Custom'.

Custom

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

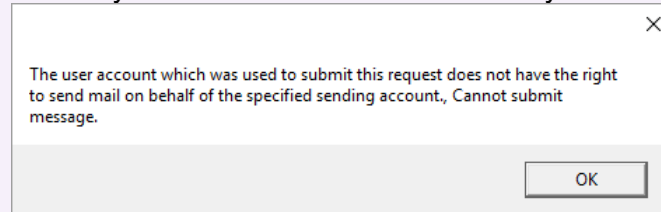
When using your company email server, your company email details must be entered.

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

Tip

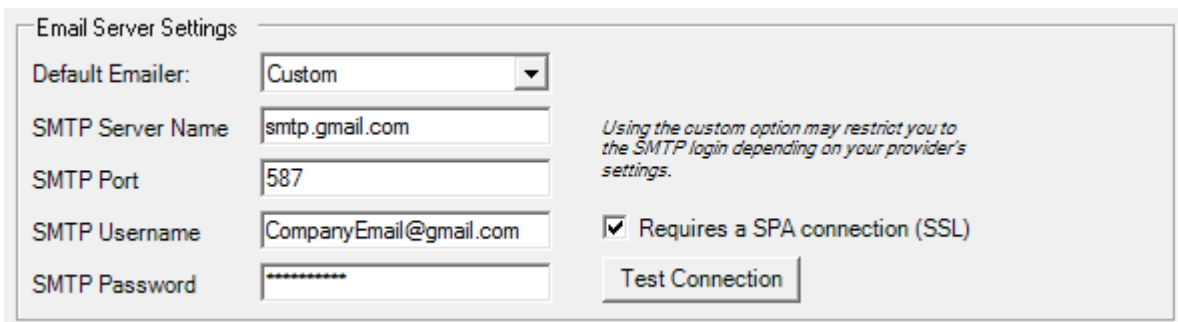
Emailed reports are sent from address may need to match *exactly* the **SMTP User Name** (server-dependent)

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



The screenshot shows an error message dialog box with a close button (X) in the top right corner. The text inside the dialog reads: '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.' There is an 'OK' button at the bottom right.

Example Gmail settings:



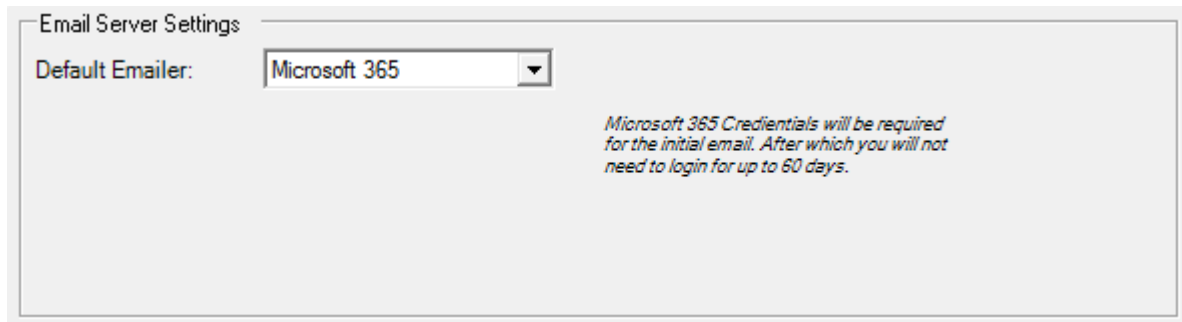
The screenshot shows the 'Email Server Settings' form. The 'Default Emler' dropdown is set to 'Custom'. The 'SMTP Server Name' is 'smtp.gmail.com', the 'SMTP Port' is '587', the 'SMTP Username' is 'CompanyEmail@gmail.com', and the 'SMTP Password' is masked with asterisks. A checkbox labeled 'Requires a SPA connection (SSL)' is checked. A 'Test Connection' button is located at the bottom right. A note on the right side of the form states: 'Using the custom option may restrict you to the SMTP login depending on your provider's settings.'

Caution

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

Microsoft 365

Example Microsoft 365 settings:

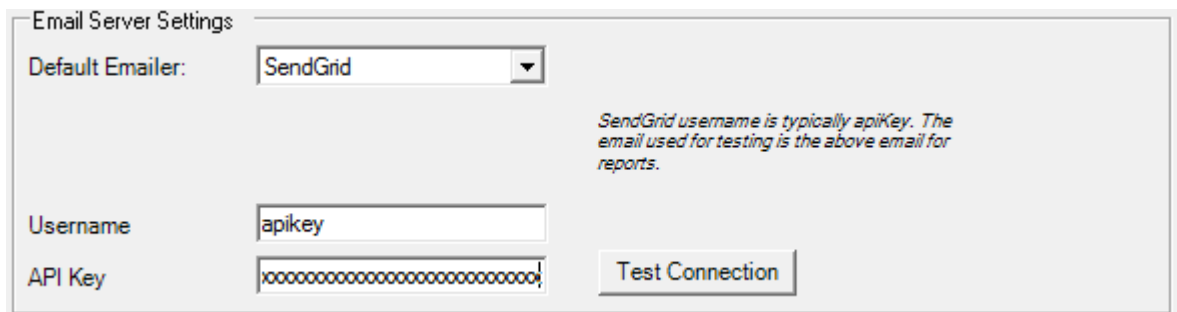


The screenshot shows the 'Email Server Settings' section. The 'Default Emitter:' dropdown menu is set to 'Microsoft 365'. Below this, a note states: 'Microsoft 365 Credentials will be required for the initial email. After which you will not need to login for up to 60 days.'

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

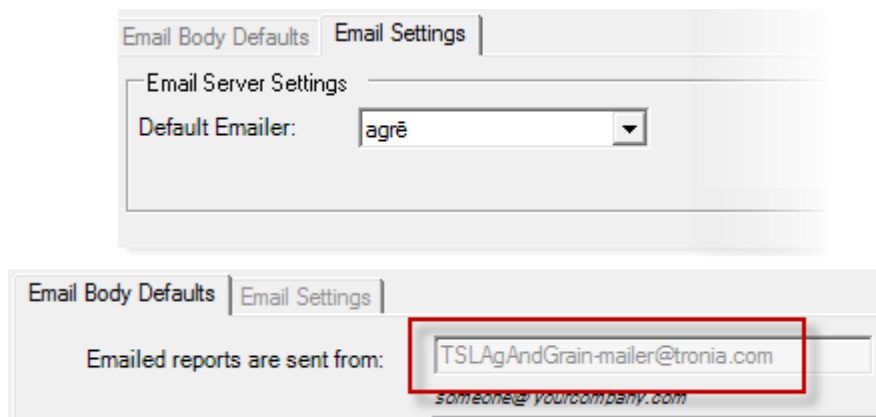
Example SendGrid settings:



The screenshot shows the 'Email Server Settings' section. The 'Default Emitter:' dropdown menu is set to 'SendGrid'. Below this, a note states: 'SendGrid username is typically apiKey. The email used for testing is the above email for reports.' The 'Username' field contains 'apikey' and the 'API Key' field contains a long string of 'x' characters. A 'Test Connection' button is located to the right of the API Key field.

agrē

Selecting **agrē** uses Tronia's server to relay emails through our domain to the recipient. All email sent will be FROM **[your company]-mailer@tronia.com**.



The screenshot shows the 'Email Settings' tab. The 'Email Server Settings' section has 'Default Emitter:' set to 'agrē'. Below this, the 'Email Body Defaults' tab is selected. The 'Emailed reports are sent from:' field contains 'TSLAgAndGrain-mailer@tronia.com', which is highlighted with a red box. Below this field, a note states: 'someone@yourcompany.com'.

Please talk to your CSC before choosing this option.