

Outbox System Requirements and Recommendations

DM2 Software's Outbox system, a standard feature found in all DM2 *Petroleum Insights* ERP system, give you the ability to automatically batch-fax and batch-email your customer their invoices, statements, and other types of documents directly from your system.

The Outbox System interacts with existing email and fax frameworks. The Outbox System supports SMTP (Simple Mail Transfer Protocol) servers for sending both emails and faxes. The customer is responsible for having this configured and accessible. Alternately, the customer can write an external program that will take the necessary information as command-line parameters and initiate the fax or email transfer.

SMTP - if using an SMTP server for either faxes or emails, the SMTP server must be configured to do outbound message routing without authentication or with simple SMTP authentication. Unauthenticated routing is often disabled as a protection against being an open mail relay. However, in most mail servers (including Microsoft Exchange) it is possible to allow outbound message routing for certain IP addresses. This feature should generally be configured on the mail server so that anonymous SMTP messages can be sent from the computer that initiates the send in order for the Outbox System, but an SMTP username and password can also be used.

If you are unable to use simple SMTP authentication or unauthenticated routing with their email service, they can set up an SMTP service on the SAGE 100 or another internal server to accept unauthenticated emails from the SAGE 100 server and then smarthost authenticate them to the email service.

NOTE: In a client/server (SAGE 100 ADVANCED) environment, the SAGE 100 ADVANCED Server computer initiates the send, no matter what workstation it is started from. In a SAGE 100 ADVANCED environment, the SMTP server must be available from the SAGE 100 ADVANCED server computer.

To send faxes through SMTP, an email-to-fax converter must be in place. This email-to-fax converter must accept an SMTP message with the fax number embedded in the "To" field, the fax subject in the "Subject" field, the fax cover page note (if a cover page is desired) in the body of the message, and the content of the fax attached to the email as a TXT or PDF file. Local fax server systems that accept SMTP requests, both hardware-based and software based, are available. You can also subscribe to an Internet faxing service such as eFax.

External Driver - If you are locked into a system that is incompatible with the SMTP option described above, you can still work with the Outbox System by constructing your own driver for your particular fax/email system. This generally takes the form of a batch file calling command-line utilities. Separate drivers for your fax and email systems will be required. Your driver will take the fax number or email address, the full path to the file to be attached, the full path to the file containing the text note, the

descriptive name of the attached file, and the subject line of the email as command-line parameters. Each of those parameters will be surrounded by double-quotes. Your driver must be able to use that information to send an email or fax.

The Outbox System will read the DOS Errorlevel that is returned by your driver. If it is anything other than zero, the Outbox System will assume that there was an error communicating with your driver, and set that message with an "Error" status.

Caveats - the Outbox system will not generate fax cover pages. If you need fax cover pages on your documents, your email-to-fax converter will have to be able to add those automatically.

Notes added to the cover page of a fax or the body of an email cannot be set for each customer or each recipient; they can only be set for a document type. However, you can have different notes for emails and faxes. For example, for Sales Order Invoices, you can have a note for emailed invoices that tells users where to download the Adobe Acrobat Reader, but not have that note appear on faxed invoices. You can also use the note area for announcements of new features or products you are offering. However, you can't configure a note such as "Deliver to Lisa in Accounting" for a particular customer.

The Outbox System provides no monitoring of faxes or emails once they have been released into your existing email/fax framework. If the Outbox System can create the message in Outlook or talk to the SMTP server or successfully execute your driver, it sets that message as "Released" and cannot monitor it any farther. If the fax number is busy or incorrect, or the email comes back as undeliverable, the Outbox System will not be able to detect or report that. Your fax and email framework must be able to provide any alerting or monitoring functions that you require.

Configuring Outbox for Office 365

- 1) There are 3 versions of Office 365 available:
 - a. Online Only
 - b. Desktop version of current MS Office only
 - c. Both Online and Desktop Version

The Desktop version you get from 365 is identical to what Microsoft supplies to PC manufacturers. Currently, with 365, you have the option of downloading the Desktop versions 2013 or 2016, 32 or 64-bit.

If your version of DM2/Sage system is compatible with one of those Desktop versions, AND you have an Office 365 version that includes the Desktop version, DM2 recommends installing the Desktop version compatible.

Microsoft also has "Exchange 365" which is a hosted Exchange email service similar to Gmail that they bundle with some options of Office 365. (It's what we use at DM2).

- a. Sage 100 Paperless Office emailing is compatible directly with this service, and your customer already found the details of how to configure it.
- b. DM2 Outbox is compatible to send emails with a relay, usually through IIS SMTP or STUNNEL.
- c. Sage CRM is compatible with a relay, usually through IIS SMTP or STUNNEL or both.

Below is a more detailed description of DM2 Outbox setup with Exchange 365, the online mail service component of some Office 365 subscriptions¹.

Online email services like Gmail or Exchange 365 require TLS encryption for sending emails. DM2 Outbox does not support TLS natively, so you must add a connector to provide the TLS encryption.

There are three ways to provide that connection:

1) Use STUNNEL to provide the TLS/SSL tunnel for DM2 Outbox

- a. Advantages:
 - i. A single service configured once
 - ii. User and Password are configured from DM2 Outbox, and the “Released”/”Error” reflects correctly
- b. Disadvantage:
 - i. Since it’s connecting directly from DM2 Outbox to MS 365 servers, sending is slower than with a local mail server.

2) Use Microsoft IIS SMTP service to relay messages for DM2 Outbox

- a. Advantages:
 - i. Built-in to Microsoft servers 2008 and later
 - ii. The relay process makes Outbox very fast
- b. Disadvantages:
 - i. It’s an additional service to maintain.
 - ii. If the MS SMTP service has trouble relaying, like the password expires, the emails will stack up in the SMTP service but show as “Released” in DM2 Outbox

3) Subscribe to a service that doesn't require TLS like <http://www.smtp2go.com/>

- a. Advantage:
 - i. Simple setup, nothing to configure besides the smtp2go site and the DM2 Outbox
- b. Disadvantage:
 - ii. Service fees are incurred

DM2 is available on a time and material-basis to assist your IT Department to set-up STUNNEL or IIS SMTP.

Troubleshooting - If you encounter error messages, you can enable the DEBUG option to generate a detailed log of where the error is occurring. To enable Troubleshooting:

Temporarily change the SMTP Server in the Outbox setup from the IP alone to [DEBUG]IP, example:

```
FROM: 192.168.1.2  
TO: [DEBUG]192.168.1.2
```

Next, send a single email message. In the MAS90\SOA folder, you will find a file named SYCEML.DBG. that contains a simple text file listing the reasons for the error.

Be sure to **remove the [DEBUG]** to avoid filling the hard drive with SYCEML.DBG. files.

¹ Reference: Microsoft IIS SMTP or STUNNEL configuration: <https://www.messageops.com/smtp-relay-with-office-365/>