

Email Setup

Document #:	3471	Product:	CenterPoint®
--------------------	------	-----------------	--------------

This document explains a portion of the setup information necessary to email [invoices](#), [statements](#), [receipts](#), [sales orders](#), [purchase orders](#), and [vendor checks \(pay advices\)](#) from CenterPoint. For additional information about emailing, click the specific type of document to be emailed link in this paragraph.

[Email Settings](#)

[Test Settings](#)

[Additional Information About Ports](#)

[Red Wing Cloud Services Email Settings](#)

Email Settings

- » **Server** - Enter the SMTP (Simple Mail Transfer Protocol) server through which your outgoing email is routed. If you do not use a server internally, the server is your IP provider's mail server (for example, smtp.server.com).
- » **Port** - Enter the port through which outgoing email is sent (up to 4 digits). There are currently some common implementations of SMTP used: **Port 25** (Cleartext SMTP with Require Secure Connection (SSL/TLS) = No), **Port 587** (Explicit TLS SMTP with Require Secure Connection (SSL/TLS) = Yes), or **Port 465** (Implicit TLS SMTP with Require Secure Connection (SSL/TLS) = Yes):



Note: Although each implementation of SMTP has a default port to use (Implicit = 465, Explicit = 587, Cleartext = 25), the port used can be different. The port used is determined by the server. The Require Secure Connection (SSL/TLS) implementation, port, and authentication requirements can be verified by your administrator or email service provider.

See the [Additional Details on Ports](#) section for more information.

- » **Require Login** - Select **Yes** if you require a user to be logged in when emailing invoices, statements, receipts, sales orders, and purchase orders.
- » **Username** - Enter the username for logging into SMTP servers that require authentication. This box is active only when the Require Login check box is set to Yes.
- » **Password** - Enter the password for logging into SMTP servers that require authentication. (The password is encrypted. The data is not readable directly from the database.) This box is active only when the Require Login check box is set to Yes.
- » **Require secure connection (SSL/TLS)** - Select **Yes** if you require a secure SSL/TLS connection. No is the default setting. See the Port section in this topic for common settings for your SMTP configuration.
 - » If your email service provider does not require a secure connection (SSL/TLS), you receive an error when configuring SMTP to not use a secure connection, and you are on a CenterPoint version prior to version 18.3, please contact the Red Wing Software Technical Support center for additional information.

- » **Ignore Certificate Issues** - Select **Yes** to bypass SMTP certificate validation. **WARNING:** Your SMTP certificate is part of your email system outside of CenterPoint. Disabling certificate validation removes critical security checks exposing you to potential threats. Before enabling this function, you should consult your System Administrator. For additional information, contact the Red Wing Technical Support department.
- » **Timeout** - Enter the interval of time to pass before the cancellation of the email task.

Test Settings

- » **To/From Email Address** - Enter the default sender's email address. Once the To/From Email Address is entered, the system will try to auto fill the **Server** and **Port**. If it's unable to auto-fill the information, you'll have to get the information from your network administrator. They can also let you know what you should select in the **Require Login** and **Require secure connection (SSL/TLS)** fields.
- » Click **Test** . An email will be sent indicating the SMTP options have been set correctly. Verify that you received the CenterPoint: Testing SMTP Configuration email.
 - » If you did not receive the email, verify your settings and/or contact your administrator or email service provider.
 - » If the Test works but the actual emails fail, verify the **From Address** in **Setup > General > Email Addresses**. You may not have access to send from that address.
 - » If you receive an error that refers to your certificate, verify the certificate. The error will often have a list of possible issues.

Additional Details on Ports

- » **Cleartext SMTP – Port 25**
 - » This method is an unsecure port. This implementation of SMTP does not encrypt the communication between client and server, nor the emails being sent. Communication and messages sent using this implementation can be read by any server or router that they pass through between client and server
 - » If you are having difficulty sending emails, verify that the **Require Secure Connection (SSL/TLS)** setting is set to **No**
- » **Explicit TLS – Port 587**
 - » Additional SMTP commands allow the SMTP protocol to support message encryption. This implementation of SMTP communication starts just like Cleartext with unencrypted communication between the client and server. The client sends the 'STARTTLS' command and if the server is able, it will respond and let the client know that it will support encryption of emails. If they can negotiate the encryption to be used all email messages sent will be encrypted, but the 'control' communication between client and server will remain unencrypted.
 - » If you are having difficulty sending emails, verify that the **Require Secure Connection (SSL/TLS)** setting is set to **Yes**.
 - » If you continue to have difficulty sending emails and you do not require a secure connection, change the **Port to 25** and the **Require Secure Connection (SSL/TLS)** to **No** or contact your email server provider or administrator to verify which port to use. The ports listed in this documentation are common, but individual email servers can be configured to use any port.
- » **Implicit TLS – Port 465**
 - » This method uses a server certificate to encrypt the entire conversation between the client and server, like communication with a secure website. This is the preferred method for SMTP communication but requires the server to be set up to communicate this way, has a certificate, and can be accessed using a FQDN (fully qualified domain name) like smtp.mydomain.com.
 - » If you are having difficulty sending emails, verify that the **Require Secure Connection (SSL/TLS)** setting is set to **Yes**.

- » If you continue to have difficulty sending emails and you do not require a secure connection, change the **Port to 25** and the **Require Secure Connection (SSL\TLS)** to **No** or contact your email server provider or administrator to verify which port to use. The ports listed in this documentation are common, but individual email servers can be configured to use any port.

Red Wing Cloud Services Email Settings

If you are emailing invoices, statements, receipts, sales orders, purchase orders, or vendor checks (pay advices) from CenterPoint in the Red Wing Cloud, this preference should be set as follows:

1. In the **Server** box, enter **customer-mail-relay.wizmoworks.com**.
2. In the **Port** box, enter **25**.
3. In the **Require Login** box, select **No**.
4. The **Username** and **Password** boxes will be blank
5. In the **Require secure connection (SSL\TLS)** box, select **No**.
6. In the **Ignore Certificate Issues** box, select **Yes** to bypass SMTP certificate validation.
7. In the **Timeout** box, enter **30**.
8. Verify the settings by following the [Test Settings](#) section.