How to configure your mailbox?

This article will show you, step-by-step, how to configure your email in cairo.ERP. This way, you'll be able to send documents directly from the program, saving you time and streamlining your work!

Benefits of setting up email in cairo.ERP

Setting up email in the cairo.ERP system offers great convenience. Thanks to it, you can:

- **Quickly send documents**: You no longer need to save invoices or other documents to your disk and then manually attach them to emails. You can send them directly from the program!
- **Send various types of messages**: The email sending option in cairo.ERP isn't just for invoices! You can use it for:
  - Sending documents to clients (e.g., invoices, orders).
  - Sending report printouts internally (e.g., to accountants, managers).
  - Sending general messages to clients.
  - Sending balance confirmations to clients.
  - Sending payment reports.
- **Save time**: Everything is in one place. No more switching between email programs and ERP.
- **Improve organization**: You can be sure you're sending correct documents directly from the system, which reduces the risk of errors.
- **Automatic email address suggestions**: If you fill in a contractor's email address in their data (**ERP > CONTRACTORS > [Enter] > GENERAL DATA > E-MAIL**), the program will automatically suggest this address when sending documents, further speeding up your work!

Setting up email account data

To set up your email in cairo.ERP, do the following:

1. Go to **ADMINISTRATION** in the ERP program.
2. Select **PARAMETERS**.
3. Go to the **E-MAIL** tab, then **ACCOUNT DATA**.

Now, fill in these fields:

- **STATUS**: Here you enable or disable email support.
- **DIRECTORY WITH CERTIFICATES**: This is where the program will find the necessary certificate files.
- **HOST**: This is the email server address. Examples:
  - WP: `smtp.wp.pl:465`
  - O2: `smtp.poczta.o2.pl:465`
  - Onet: `smtp.poczta.onet.pl:465`

  If you have email with another provider, you can find the SMTP address (a special address for sending mail) on their website.
- **LOGIN**: Your email login.
- **PASSWORD**: Your email password.
- **FROM**: The email address from which messages will be sent.
- **FROMNAME**: The name that will be visible to the recipient.
- **CERTIFICATE**: Here you select the certificate (if needed).

> The program does not support Gmail.

Sending emails and documents via email

Once everything is set up correctly, you can send documents via email directly from cairo.ERP.

Example of how to send an invoice:

1. Go to **ERP > SALES > INVOICES**.
2. Press **[Enter]**, then **[Tab]**.
3. Select **PRINT**. The options **print on - to file / email** will appear.

Sending to email

If you select the **e-mail** option, the program will send the selected document or other printout as an attachment in **TXT** format. Then, fill in the following fields:

- **TO**: The email address to which the message should be sent. Remember that if the contractor's email address is filled in their **general data**, the program will automatically suggest it.

- **SUBJECT**: The subject of your email.
- **MESSAGE CONTENT**: What you want to write in the email body.
- **ATTACHMENTS**: The name of the file you are attaching.
- **CONFIRMATION**: Whether you want to receive confirmation that the message reached the recipient.

Sending to file

If you select the **to file** option, you will have the option to save the document as a file in **PDF** format. After selecting the **PDF** format, check the **SEND TO EMAIL?** option to **YES**. You will then also need to fill in the same sending parameters as when directly selecting the "e-mail" option.

Sending emails from the contractor level

You can also send an email directly to a client if their address is filled in their contractor data:

1. Go to **ERP > CONTRACTORS**.
2. Select a specific contractor (press **[->]**).
3. Select the **SEND EMAIL** option.

Email message templates

To further speed up sending, you can define email message templates:

1. Go to **ERP > ADMINISTRATION > PARAMETERS**.
2. Select the **E-MAIL** tab, then **E-MAIL TEMPLATES**.
3. Here you can create and edit your templates.

When sending a message, in the **MESSAGE CONTENT** field, you can load a ready-made template by pressing the **[F2]** key.

What to do if something isn't working?

Error: NOT ALL MAIL ACCOUNT DATA ENTERED

This means you haven't filled in all the necessary fields with email account data. Go back to the **Setting up email account data** section (Point 1) and check if all mandatory data is completed.

Error: FAILED TO SEND MESSAGE

If the email won't send, check these things:

- **Login and password**: Make sure you have entered the correct login details for your email.
- **SMTP (IMAP) enabled**: Check if the **SMTP** service (sometimes called IMAP) is enabled on your email account. Some email providers require you to enable this manually. If you don't know how to do this, or if there's no such option, contact your email provider's customer support.

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