

Email Tool

Email Tool enables one to send emails as part of a workflow process.

Configure Email Tool

Configure Email Tool > Email > Attachments

SMTP Host *





SMTP Port *


Security

SMTP Username

SMTP Password

Figure 1: Email Tool Properties

Name	Description
SMTP Host	Email Server SMTP Host <div> Example smtp.gmail.com</div>
SMTP Port	Email Server SMTP Port <div> Typically, port 465 for SSL security option and 587 for TLS</div>
Security	<ul style="list-style-type: none">• None• TLS• SSL
SMTP Username	Email Server Account Username <div> On Google email account, use your full email address.</div>
SMTP Password	Email Server Account Password <div> Password submitted will be encrypted for security reason.</div>

 **Quick Test**
Hit on the "Send Test Email" button to quickly validate and test out your email settings.

Email

Configure Email Tool > **Email** > Attachments

From *

To (Specific email address)

To (Participant ID)

CC

BCC



Subject

Message

HTML Content?

Figure 2: Email Tool Properties - Email

Name	Description
From	Sender email address. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Example no-reply@your-company-name.com </div>
To (Specific email address)	Recipient fully qualified address.
To (Participant ID)	Participant ID(s) according to the process flow it resides in. Multiple values can be accepted by separating them with semicolons. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> When To (Specific email address) and To (Participant ID) are both populated, email will be sent to both. </div>

CC	<p>Fully qualified address is expected.</p> <p>Multiple values can be accepted by separating them with semicolons.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> CC: lets you send a copy of a message to someone who's interested, but is not the primary recipient.</p> </div>
BCC	<p>Fully qualified address is expected.</p> <p>Multiple values can be accepted by separating them with semicolons.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> Both Cc and Bcc forward a copy of the message to everyone you've listed. The main difference between Cc or Carbon copy and Bcc (Blind carbon copy) is that, with the latter, the recipients do not get to know each other.</p> </div>
Subject	Email Subject.
Message	Email Message.
HTML Content?	Check if "Message" is intended to be a HTML content.

Attachments

Configure Email Tool > Email > Attachments

Form ▼

Form Upload Fields

Field ID ↑ ↓ ×

+

Files

Path	Type	File Name
<input type="text"/>	<div style="border: 1px solid #ccc; padding: 2px;"> <p>System Path ▲</p> <p style="background-color: #0070c0; color: white; padding: 2px;">System Path</p> <p>URL</p> </div>	<input type="text"/>

+

Figure 3: Email Tool Properties - Attachments

Name	Description								
Form	File attachment source form.								
Form Upload Fields	File attachment field ID(s) in the Form selected above.								
Files	<p>This attribute allows one to define the file attachment freely by defining a system path or absolute URL.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Path</td> <td>Source file path & filename.</td> </tr> <tr> <td>Type</td> <td> <ul style="list-style-type: none"> System Path URL </td> </tr> <tr> <td>File Name</td> <td>File name to be used in Email attachment.</td> </tr> </tbody> </table>	Name	Description	Path	Source file path & filename.	Type	<ul style="list-style-type: none"> System Path URL 	File Name	File name to be used in Email attachment.
Name	Description								
Path	Source file path & filename.								
Type	<ul style="list-style-type: none"> System Path URL 								
File Name	File name to be used in Email attachment.								