

# 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> <b>Example</b> smtp.gmail.com</div>
SMTP Port	Email Server SMTP Port <div> Typically, port <b>465</b> for <b>SSL</b> security option and <b>587</b> for <b>TLS</b></div>
Security	<ul style="list-style-type: none"><li>• None</li><li>• TLS</li><li>• SSL</li></ul>
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 gray; padding: 5px; margin-top: 10px;"> <p> <b>Example</b> no-reply@your-company-name.com</p> </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 gray; padding: 5px; margin-top: 10px;"> <p> When <b>To (Specific email address)</b> and <b>To (Participant ID)</b> are both populated, email will be sent to both.</p> </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> <b>CC:</b> 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 (<b>Blind carbon copy</b>) 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><input type="text"/> 🔍</p> <p style="background-color: #0056b3; 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 <b>Form</b> 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 &amp; filename.</td> </tr> <tr> <td>Type</td> <td> <ul style="list-style-type: none"> <li>• System Path</li> <li>• URL</li> </ul> </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"> <li>• System Path</li> <li>• URL</li> </ul>	File Name	File name to be used in Email attachment.
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