

MYOB Greentree

Email Configuration and Troubleshooting

October 2023



Contents

Introduction	1
Email fundamentals	2
Components	2
Greentree mail functions.....	2
Email sending	3
Email addresses	3
Emailing preferences	4
Email retrieval	7
CRM Email Filing.....	7
eDocs Email Imports.....	10
Exchange EDI Email Imports	12
Credentials	14
Security Options	16
Token management	17
Troubleshooting	18
Symptoms and remedies.....	18
Task Queues	22
Log files	22
Test SMTP from PowerShell	23
Test email retrieval using EDI Fetch Task.....	23

Introduction

MYOB Greentree makes extensive use of email for notifications and document exchange. The entire pathway for each email involves settings in Greentree, settings on an email account in a mail server and other network and server configuration. Setup and troubleshooting require care, access and guidance across multiple systems and tools.

This guide is intended for MYOB Greentree partners, consultants and staff. It explains how to configure email in Greentree. While we cannot be responsible or give advice for configuring mail servers, this guide does provide some suggestions from our experience of site issues. It includes troubleshooting suggestions and references.

This is a technical guide. For business functions, see the MYOB Greentree Desktop **Online Help**. For matters of security, the latest MYOB Greentree **Security Recommendations** document is the definitive source.

Version	Summary	Publication Date
1	Initial release with Greentree 2023.1	March 2023
2	New app server setting and extended Test Send function in Greentree 2023.3	October 2023

This version includes two enhancements to email sending:

- An option to have emails generated by Windows clients sent via the application server.
- An option to send a test email via the email queue.

Email fundamentals

This section provides the context for more technical detail in later sections.

Components



Greentree can send or retrieve email from a client or server application.

Greentree acts as a mail client when it connects to a mail server.

A connection is usually very quick and closes within seconds.

Mail servers require the credentials for an email account.

Mail servers may support multiple protocols and authentication methods.

Greentree mail functions

Greentree sends email in these functions:

- Approval and Alert rules can be set to send emails
- Exchange EDI sends documents by email, and can send email notifications
- Reports can be emailed, and in the special case of eReporting, consolidated by recipient and sent to email addresses determined dynamically
- Many other functions throughout Greentree.

Greentree retrieves email in these functions:

- CRM Email filing retrieves emails and attaches them to existing objects such as leads and quotes
- eDocs and Exchange EDI retrieve emails and ultimately create business documents such as invoices.

Configuration and troubleshooting for each function are detailed in later sections.

Email sending

This section explains what must be configured to send reports and notifications by email.

Generally, an email sending function provides this business information:

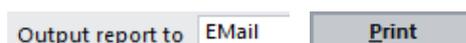
- The recipient's email address
- The email address for replies
- The subject and body of the email
- Attachments, such as a report in PDF format.

To send the email, Greentree also requires these technical details:

- The server's address and port number
- The protocol and authentication method
- Credentials for the email account.

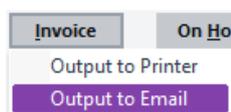
These can be set up in Greentree at system level, or if required at company level.

Reports can be emailed by choosing the EMail output option, entering the recipient's email address and then using the Print button.



Some reports support eReporting, where output is consolidated by recipient and sent by each recipient's preferred delivery method. The corresponding output options are Auto email, Auto email/print and Auto print.

Emailing of reports requires a **task queue** to be configured to process email tasks, and the queue must be running. Some reports are generated and sent using "hot print" functions that do not use task queues e.g. from the Output to Email option on the popup menu in the Invoice button on Sales Order Entry.



Warning: in a test system, email sending is by default disabled. See the settings on the Test System tab of the General System Preferences form.

Email addresses

To a mail server, Greentree is an email client that connects to an email **account**. That account's name is typically an email address. When Greentree sends mail, it uses the account and credentials set up at company or system level.

An email has a **From** address that can be used to identify the origin or author. An email can also have a **Reply To** address that shows when a recipient replies. These addresses can be helpful where an email account is generic or not intended for replies e.g. no-reply@bus.com.

Some Greentree email sending functions allow the user to enter From and Reply To addresses. Some provide defaults, such as the Email Reply Address on HR Module Control. Others draw directly on user, company and system settings.

When required, the system determines the reply address according to the **Reply Address Level** setting on General System Preferences / Email Preferences. The options are:

1. **User** - the user's Reply To Email field on the User Preferences form, failing that the User's default Team's Reply To Email field, failing that the company or system default
2. **Company** - the company's Email field on the Company Maintenance form, failing that the system default
3. **System Preferences** - the Default Reply Address on the General System Preferences form.

Note: Exchange will block an email that has a From address that does not match the account name, and report a Send As Denied error. It is possible to configure the account to allow sending From other addresses.

Emailing preferences

The technical details for email sending can be set up once, in one place: the Emailing Preferences tab of the General System Preferences form.

Alternatively, if different setup is required per company, the details can be configured on the Emailing Preferences tab of the Company Maintenance form. This has the same fields.

Field	Description
Mail server address and port	Enter the name of the server and port number from your service provider. If you're using SMTP on Microsoft's cloud hosted Office365 service, this will be smtp.office365.com and 587.
Default reply address	Used from From and Reply To addresses if the email sending function does not specify addresses and no other settings supersede it. See the topic Email addresses for details.

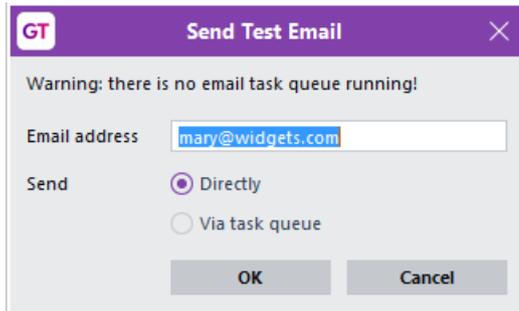
Reply address level	See the topic Email addresses for details.
User name	This read-only field shows the email account entered via the Credentials button.
Security option	Determines how Greentree conducts the negotiation for the security protocol to be used for its connection to the mail server. This is used for SMTP but not for Exchange Web Services. See the section Security Option for details.
Send client email via application server	Turn this on to cause emails initiated by users running thin client to be sent from the application server. This setting was introduced in Greentree 2023.3 with the default being off, which preserves existing behaviour. Turning on this feature has the advantage that Greentree connects to the email server entirely from the application server, using the Windows account under which the application server runs, not from individual user's local machines.
Log traffic	Turn this on when troubleshooting email sending issues. The system will write details of each email sent to the appdebugN.log file in the server's logs directory. The details include the server name, port, user name, From address, Reply to address, To address, CC addresses and Subject.
Credentials	Click the Credentials button to select the protocol and authentication method and fill other fields on the Credentials form. See the section Credentials for details.
Send a test email	This sends a test email. See the topic below.

Send a test email

Whenever you change settings, use the test function to check them. If you're working in a test system, be sure that emailing is enabled and directed to a known email address.

In Greentree 2023.3 the test function was extended to shows a dialog box with

- Information and warnings such as
 "Warning: there is no email task queue running!"
 "This is a test system. Emails will be diverted."
 "This is a test system. Emails will be suppressed."
- Sending options matching the two ways email is sent from Greentree: directly and via the task queue.

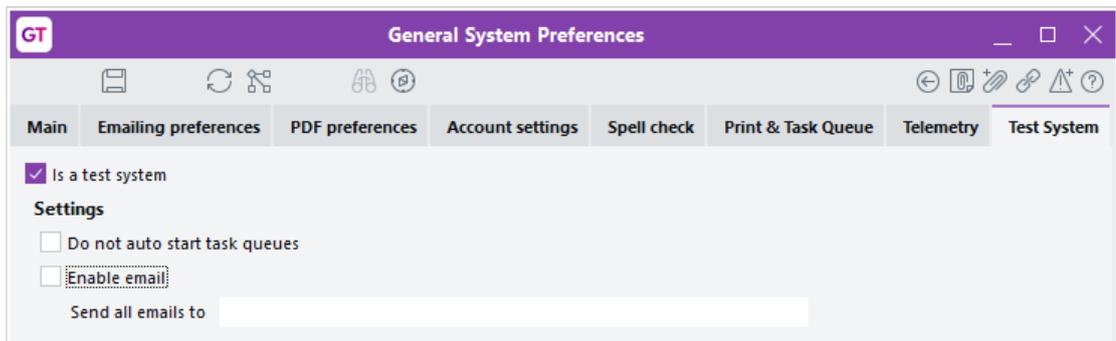


The **Direct** option sends email within the user’s session. This uses the Windows account under which the application server is running. It invokes the mail library *asynchronously* i.e. it initiates sending and displays a message box when the library notifies success or failure.

The **task queue** option puts a task in the queue that handles email jobs. If the task queues are not running the button caption changes to “Not queued”. If the task has been assigned to a queue that processes email, the caption shows “Waiting”. Sending is done using the Windows account under which the task queue is running. This invokes the mail library *synchronously* i.e. it calls a sending function and waits for it to return, then notifies the Greentree user’s session.

Warning

In a test system, email sending is by default disabled. See the settings on the Test System tab of the General System Preferences form.



Email retrieval

This section deals with Greentree functions that retrieve email. All functions require an email account on a mail server. The account must be configured on the mail server to allow access by the Greentree. This means the protocol and authentication method you select in Greentree must be supported by the mail server and enabled on the email account.

All retrieval functions include links to the Credentials Maintenance form, where you select the email protocol and authentication method, and fill other fields. See **Credentials**.

Recommendations

1. Configure a dedicated email account for each function.
2. Do not use a personal email account.
3. Do not configure rules for moving or deleting email in the inbox. After Greentree has retrieved and processed an email it moves it to the Deleted Items folder.

Hint: if you're having trouble with email altogether, start with sending because it's simpler.

CRM Email Filing

Configuration for CRM Email Filing using Exchange to Greentree has these parts:

- A service manager on Processing System Status and Setup
- Enabling settings on CRM System Options
- Company-level account and credentials on CRM Module Control
- Rules for processing of emails once they've been retrieved – see Inbound Filing and File Inbound Emails under the CRM > Relationships menu.

Service Manager

Email filing requires a special server application known as a Service Manager to be configured and running.

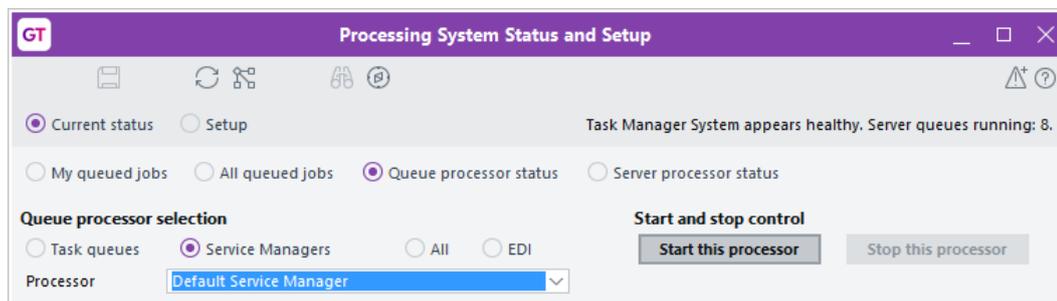
The screenshot shows the 'Processing System Status and Setup' window in Greentree. The 'Setup' tab is selected. The configuration includes:

- Setup selection: Service Manager
- Service Manager: Default Service Manager
- Workstation: DATABASE SERVER
- This service manager is active (i.e. it can be started)

Below these settings is a table titled 'Services':

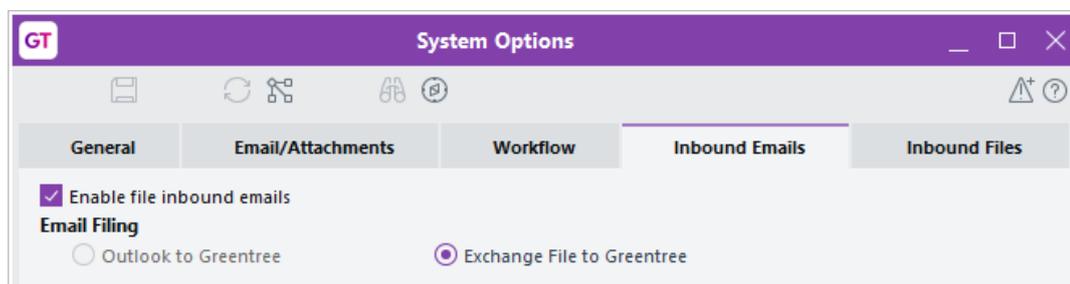
Service Type	Selected
Email Filing	<input checked="" type="checkbox"/>

Be sure the service manager is Active. This means it will be started with task queues when the Greentree is started. Alternatively, you can start it manually:



CRM System Options

Email filing must be enabled on the CRM System Options form:



CRM Module Control

Company-level settings are at the bottom of the Main tab of the CRM Module Control form:

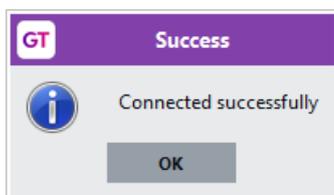
Inbound Email	
Company Email Address	NestorW@myobgreentreetest.onmicrosoft.com
Default FROM User	Craig Clark
Exchange Account	
Exchange Account	Company
User name	NestorW@myobgreentreetest.onmicrosoft.com
	Credentials Test

Field	Description
Company Email Address	Enter the email account. This is used when the service manager connects to the mail server with basic authentication.
Default From User	Select the Greentree user that the service manager will pick if the From address on an incoming email does not match any active user's email address.
Exchange Account	Select Company to enable email retrieval or Disabled to block it.
User name	This read-only field shows the email account entered via the Credentials button.

Credentials	This button opens the Credentials maintenance form, with only the Exchange Web Services protocol enabled. See the section Credentials for details.
Test	This performs a connection test. See the Testing topic below.

Testing

Whenever you change settings, use the Test function to check them. It attempts to connect to the mail server using the credentials and reports the outcome. It does not require the Service Manager to be running.



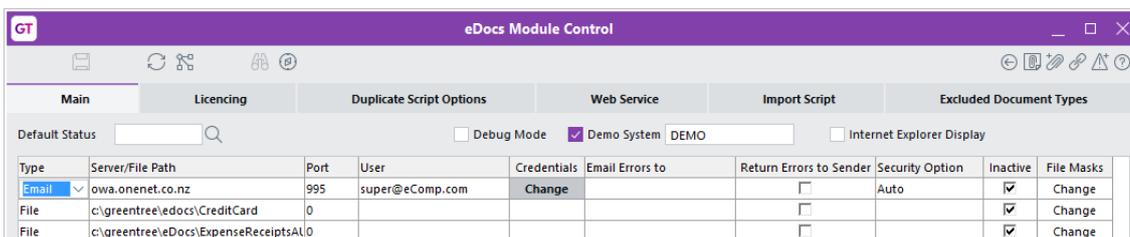
eDocs Email Imports

eDocs email imports are configured at system level on the Main tab of the eDocs Module Control form.

eDocs Module Control

The setting **Demo System** provides some convenience for demonstrations. When it is turned on, it causes filtering of email by the super user’s preference email address, and does not require task queues to be running.

Each row of the table that has a type of **Email** defines an email import task.



Field	Description
Server/File Path and Port	Enter the name of the server and port number from your service provider. If you’re using Microsoft’s cloud-hosted Office 365 service this will be outlook.office365.com and port 995.
User	This read-only field shows the email account entered via the button in the Credentials column.
Credentials	The Change button opens the Credentials maintenance form. The allowed protocols are POP3 and Exchange Web Services. See the section Credentials for details.
Security Option	The selection in combo box in this column determines how Greentree conducts the negotiation for the security protocol to be used for its connection to the mail server. This is used for POP3 but not for Exchange Web Services. See the section Security Option for details.
Inactive	Turn this <i>off</i> to enable imports.

Tips: If the eDocs script does not attempt to connect to the mail server, turn *off* the Inactive checkbox.

eDoc Script

Normal operation is for eDocs import and scraping operations to be done by a script that is scheduled. This requires task queues to be operating.

To manually perform imports:

1. Go to System > Utilities > System Scripts
2. Search for or navigate to eDoc / Import New Documents
3. Use Run script.

There are two ways to view activity and errors. These can be very useful for checking that the emails are being retrieved, and which emails have been retrieved, skipped and deleted.

1. The desktop "eDoc Desk" is generally configured to show a panel named eDoc Script Run Log. Locate the new entry and double-click. To see all activity, select the filter option All.
2. The panel display is based on the contents of a file in the logs directory on the server. The files are auto-numbered beginning eDocScript_1.log. Sometimes it's useful to work with the log file directly.

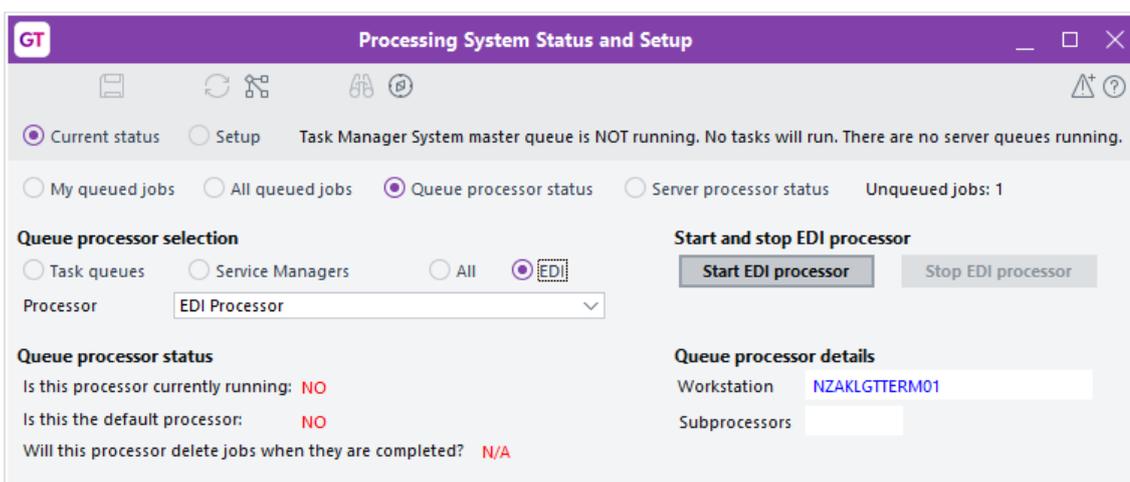
Exchange EDI Email Imports

EDI can import AP Credit Notes, AP Invoices and Sales Orders by email. The configuration is held on individual EDI profiles as described below.

EDI's Email Fetch Tasks also import emails but write them to files rather than creating Greentree documents. This makes them helpful for testing purposes – see section **Test email retrieval using EDI Fetch Task**.

EDI Processor

EDI email imports are generally scheduled and rely on the EDI Processor to be running. This is configured, started and stopped on the Processing System Status and Setup form.



EDI Profiles

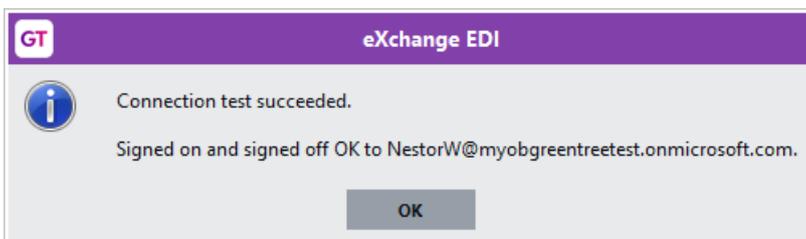
An EDI profile is configured for retrieving email by

- Using an incoming document type i.e. one marked File to Greentree on the Profile Components panel
- Picking Source by Email on the Source and Delivery panel
- Providing email account, credentials and other selections on the Source by Email panel.

Field	Description
To address	Specify the email account. This is used when the EDI processor connects to the mail server with basic authentication.
User	This read-only field shows the email account entered via the button in the Credentials column.
Credentials	This button opens the Credentials maintenance form with only the Exchange Web Services protocol allowed. See the section Credentials for details.
Test	This button performs a connection test. See the Testing section below.

Testing

Whenever you make change settings, use this to check them. It attempts to connect to the server using the credentials on the profile and reports the outcome.



Credentials

The common Email Credentials Maintenance form is used to select the email protocol and authentication method. Its other fields vary according to the chosen protocol, method and direction – sending versus receiving.

Protocol and Authentication method

For *sending*, the protocol options are

- SMTP (Simple Mail Transfer Protocol) – this protocol allows only Basic authentication
- Exchange Web Services – this allows Basic authentication or OAuth2.

For *retrieving*, the protocol options are:

- POP3 (Post Office Protocol) – this protocol allows only Basic authentication; this option is supported for eDocs but not for CRM Inbound Email Filing or eXchange EDI.
- Exchange Web Services – this allows Basic authentication or OAuth2.

Be sure to enter the credentials for the business email account, not your personal email account.

Note: Microsoft Exchange mail servers can provide multiple protocols and methods.

Basic authentication

With basic authentication, you enter the name and password for the email account. Greentree stores the password in the database using reversible encryption so that it can decipher the password when needed.

The screenshot shows a web form titled "Email Credential Maintenance" with a purple header. The form includes the following fields and controls:

- Protocol:** A dropdown menu currently showing "SMTP".
- Close:** A button to close the form.
- Authentication method:** Two radio buttons, "Basic" (which is selected) and "OAuth2".
- User name:** A text input field containing the email address "ent.greentreedevsmtp.scv@myob.com".
- Password:** A text input field with masked characters represented by asterisks.

OAuth2

With OAuth2, you are guided through a dialog where you provide the name and password for the email account to a third party, which returns tokens to Greentree that it will use when connecting to a mail server.

The screenshot shows a dialog box titled "Email Credential Maintenance" with a purple header. It contains the following fields and controls:

- Protocol:** A dropdown menu currently showing "Exchange Web Services".
- Authentication method:** Two radio buttons, "Basic" (unselected) and "OAuth2" (selected).
- User name:** A text input field containing "ent.greentreedevsmtp.scv@myob.com".
- Status:** A label indicating "Not logged in".
- Buttons:** "Close", "Log in", and "Log out" buttons are positioned on the right side of the dialog.

Use the Log In button and enter the email account's name and password. On completion, it shows the status:

The screenshot shows the same dialog box after a successful login. The fields and controls are updated as follows:

- Server Type:** A dropdown menu now showing "Exchange".
- Authentication method:** The "OAuth2" radio button remains selected.
- User name:** The text input field still contains "ent.greentreedevsmtp.scv@myob.com".
- Status:** The label now indicates "Valid until 30/05/2023".
- Buttons:** The "Close" button is still present, but a "Refresh" button has been added below it, and the "Log out" button remains at the bottom.

Warning

Be sure to enter the credentials for the business email account, not your personal email account.

Security Options

When using POP3 and SMTP, an additional setting known as a “security option” is required. It determines how Greentree conducts the negotiation for the security protocol to be used for its connection to the mail server.

This setting is not used with Exchange Web Services.

The security options are:

- None – Connection is not secured
- SSLExplicit – Uses the STARTTLS command to start SSL/TLS connection
- SSLImplicit – Establishes a SSL/TLS connection first
- SSLAuto – Uses SSL/TLS implicit or SSL/TLS explicit mode automatically
- Auto – Auto selection mode.

The abbreviation TLS stands for Transport Layer Security, a protocol that supersedes the older SSL (Secure Sockets Layer). The terms are sometimes used interchangeably.

Your choice of security option in Greentree depends on the versions of TLS installed on the server, and the configuration of the mail server. For instance, if the mail server requires a version that is not present on Greentree’s server, communication will fail.

Recommendations

Start with Auto and test it. If connection fails, contact the service provider for the email server and find out what version of TLS it requires for incoming client mail connections.

Reference: [Aspose.Email for .NET – API Reference](#).

Token management

This section deals with a maintenance task required for using the OAuth2 authentication method. With OAuth2 you provide the email account name and password to an external party that returns a string that Greentree stores in its database. When Greentree needs to connect to a mail server, it uses this string to establish access to the account.

The string is called a token. It is valid for a limited period, determined by the external party. Greentree provides the Token Management form for managing tokens, and a system script for emailing reminders.

Function	Expiry Date	Days until Expiry		
EDocs source super@eComp.com	*invalid*	Expired	Refresh	Test

Sign in frequency: 90 days

Send expiry reminder to: superduperadmin@whizz.com

OK Cancel

The form's table has a row for each OAuth2 token in the system. The details include

- Function – a description of what the token is used for
- Expiry Date – the calculated date at which the token will become unusable
- Days until Expiry – the calculated number of days remaining
- Refresh – a link to the Credentials maintenance form
- Test – performs a connection test with the email server.

The other fields are:

- Sign in frequency – enter the lifetime of tokens issued by the external party; for Exchange the default is 90 days
- Send expiry reminders to – enter a list of email addresses.

Notice that Greentree calculates the expiry date and days remaining from the token's issue date and the sign in frequency you enter because it does not receive the expiry date.

System Script

See the system script Generic > Security - Token Expiry Check and Reminder Email.

This identifies tokens that are expected to expire within the next 10 days and sends an email reminder to the recipients in the list.

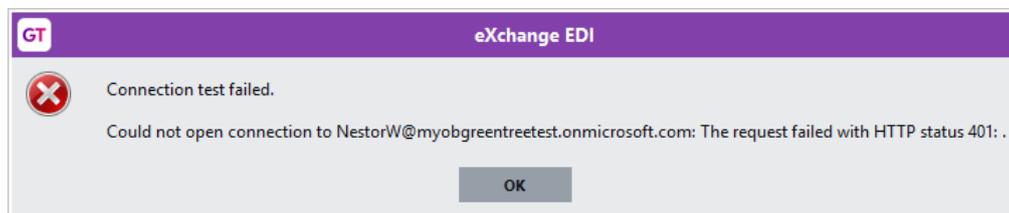
Of course, email sending must be working for the reminders to be sent :)

Troubleshooting

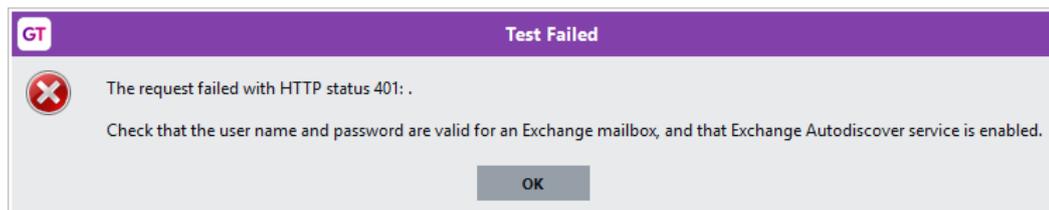
Symptoms and remedies

Connection test failed – 401 Unauthorised

This result, from a connection test on an EDI Fetch Task, failed because the mail server does not allow access using basic authentication.

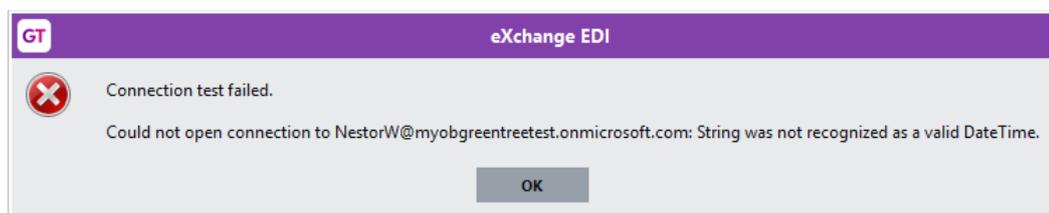


This is the equivalent message from the CRM Inbound Filing connection test:



Connection test failed – String was not recognized

This result, from a connection test on an EDI Fetch Task, failed because Greentree does not hold a token for OAuth2. The remedy is to open the Credentials form and use the Log In button.



Email sent but not received

In a test system, check the settings on the Test System tab of General System Preferences. Ensure emailing is enabled and emails are directed to an account you can access.

Exception 1242

This Jade exception code indicates that an error occurred on another database node. If you encounter this, look for more specific information in the default.log file in the server's system directory.

Exception 14009

This Jade exception arose when sending email was triggered by A&A rules from non-GUI eModule applications running on application servers. This was fixed in Greentree release 2022.4 (GT-1299).

Exception 14576

This Jade exception code indicates that an error occurred in a .NET library. Greentree uses its mail library (GreentreeMail.dll and GreentreeMailCore.dll) and that in turn uses an Aspose library (Aspose.Email.dll). If you encounter this, look for more specific information such as the extended error text, as shown in this example from a `cn_dump` file:

```
===== Exception Summary =====  
Exception Type: JadeDotNetInvokeException (14576): Error in .NET object during member call) (Not continuable,  
resumable)  
Extended Text : Message: Response is not well-formed XML.  
Target: Invoke  
Source: System.Web.Services  
Inner exception: System.Xml.XmlException: Unexpected end of file has occurred. The following elements are not  
closed: t:MimeContent, t:Message, m:Items, m:GetItemResponseMessage, m:ResponseMessages, m:GetItemResponse,
```

Exception 14577 Failed to create .NET object

This Jade exception indicates that Greentree was unable to locate or use a .NET library. If this occurs during an email operation, ensure that the require libraries (GreentreeMail.dll, GreentreeMailCore.dll and Aspose.Email.dll) are present in the binaries directory, that the correct version of the .NET Framework (4.8) is installed, and that the application has sufficient access rights to the library files.

Message submission rate exceeded

Exchange servers have a configurable limit on the number of emails they will accept from a client each minute. This can result in a message such as “Service not available, closing transmission channel. The server response: 4.4.2 Message submission rate for this client has exceeded the configured limit”.

The remedy is to increase the MessageRateLimit per this guidance

<https://learn.microsoft.com/en-us/exchange/mail-flow/message-rate-limits?view=exchserver-2019>.

Response is not well-formed XML or Unexpected end of file has occurred

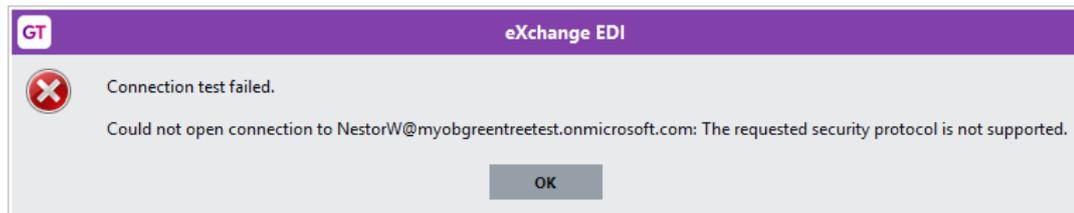
This message has occurred when Greentree is retrieving the content of an email and the Exchange server imposes a limit on size or sending time. The result is truncated XML content e.g. with additional error description “The following elements are not closed: t:MimeContent”.

Remedy: check for email size limit policies on the mail server.

Security protocol not supported

If a mail server requires a version of the TLS security protocol that the machine Greentree is running on does not have installed, it will reject Greentree’s attempts to connect and give the message “The requested security protocol is not supported.”

This has been known to occur when the Greentree machine does not enable TLS 1.2 or 1.3.



Remedy: Ask your service provider to ensure the latest TLS version is installed on the machine Greentree is running on. Try other **Security Options**.

Send as denied

By default, mail servers require the From address on an email to match the email account. This is to prevent email address spoofing. If the addresses don't match, an Exchange server will report SendAsDeniedException or ErrorSendAsDenied with a message such as "The user account which was used to submit this request does not have the right to send mail on behalf of the specified sending account."

Remedy 1: If you want to allow a user to be able to send email as if it came from another email account, you need to grant Send As permissions. See <https://learn.microsoft.com/en-us/exchange/recipients-in-exchange-online/manage-permissions-for-recipients> or <https://www.slipstick.com/exchange/configuring-send-as-permissions-on-exchange-server/>.

Remedy 2: Identify the source of the From address and change it to match the email account being used to send the email. See **Email addresses**.

Source file name is a required field

The message "Source file name is a required field when saving a file externally" occurred in systems configured to store attachments externally where email was retrieved with an unnamed attachment. This issue was resolved in Greentree release 2022.4 (GT-1218).

There is no task server with email capability

This error shows on task queue entries that send email. The remedy is to select Setup on the Processing System Status and Setup queue, choose setup selection Task Queue. Select an existing queue or create a new one, then add Email job as a task type the queue can process.

Timeout has been reached

If the mail server fails to respond to Greentree's request for a connection, it will report a message of the form "The operation 'Connect' terminated. Timeout '100000' has been reached." The timeout is measured in milliseconds, so means 100 seconds in this case. This requires investigation of the mail server's availability and performance.

Unable to retrieve Access Token

This message indicates that an error occurred when Greentree attempted to update its short-lived access token, a critical part of the OAuth2 connection process. Accompanying details include a more precise error description e.g.

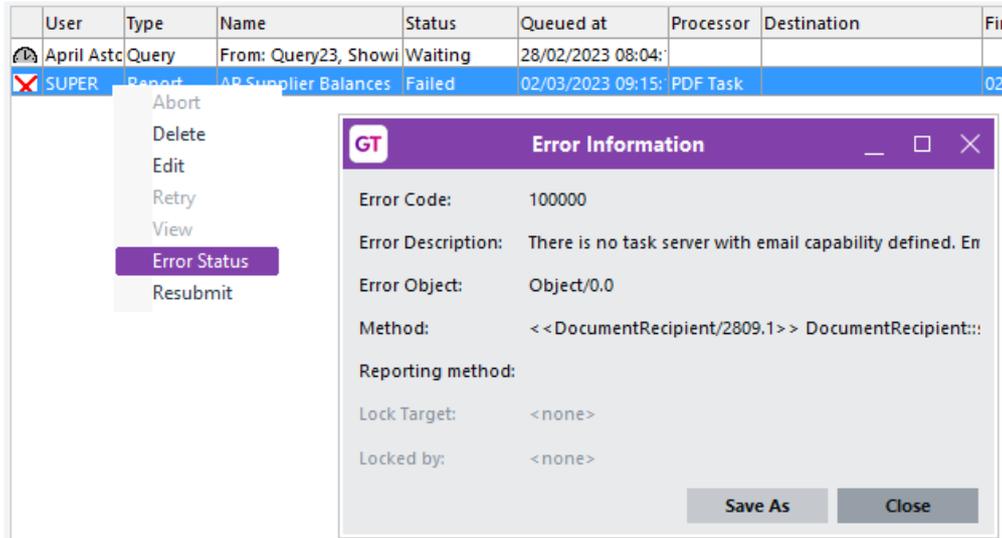
```
ErrCode:100000
ErrDesc:Unable to retrieve Access Token
[
  {
    "error": "invalid_grant",
    "error_description": "AADSTS50057: The user account is disabled.\r\n",
    "error_codes": [

```

In this case, email sending failed because the *email* account (not Greentree user account) was disabled. The remedy is to investigate the email account on the mail server and enable it.

Task Queues

For information about a failed task, open the Processing System Status and Setup form, locate the task, right-click and choose Error Status:



To get a file copy, use the Save As button.

Log files

These log files may contain details of interest. Locations may vary with INI file settings. Task queue logging needs to be explicitly turned on.

File	Content
logs\appdebugN.log on the server	Debugging output including email sending details if Log Traffic is turned on.
logs\cn_dump on server or client	CardSchema dump file when an unhandled exception occurs. Location depends on the LogPath setting in the [CardLog] section of the INI file.
logs\eDocScript_N.log	Logging of eDoc import script.
logs\taskQueue.log on the server	Task queue logging if turned on for the task queue on the Setup tab of the Processing System Status and Setup form.
system\default.log on the server	Exceptions occurring during processing on the server node, useful in case of exception 1242.

Test SMTP from PowerShell

This tests the email account and environment, entirely independent of Greentree. It uses the SMTP client accessible in Windows PowerShell.

Open a PowerShell window and paste in these lines, replacing the highlighted text with your email addresses, mail server address, email account (typically an email address) and password:

```
$EmailFrom = "sender's email address"  
$EmailTo = "recipient's email address"  
$Subject = "Test email from PowerShell"  
$Body = "Confirming email sending via SMTP"  
$SMTPClient = New-Object Net.Mail.SmtpClient("mail server", 587)  
$SMTPClient.EnableSsl = $true  
$SMTPClient.Credentials = New-Object System.Net.NetworkCredential("email account", "password")  
$SMTPClient.Send($EmailFrom, $EmailTo, $Subject, $Body)
```

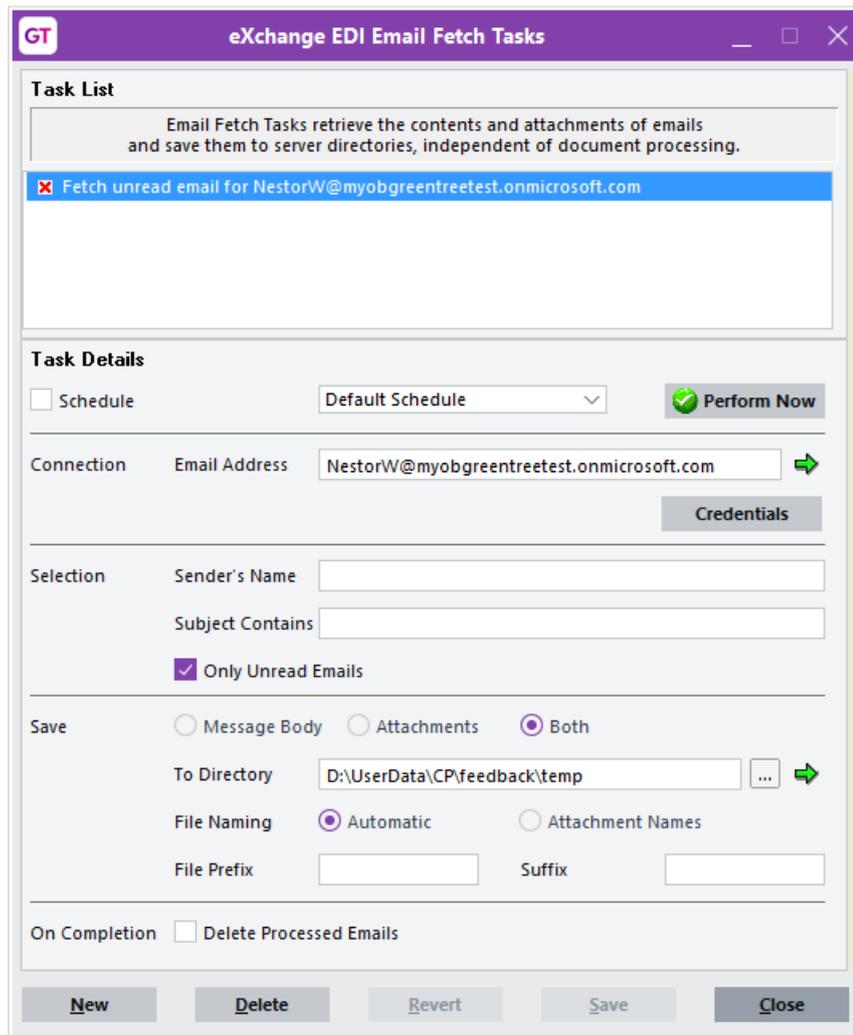
If sending fails, you should resolve the errors before configuring Greentree to send email by SMTP.

Test email retrieval using EDI Fetch Task

This is the easiest way to test your connections for email retrieval. An EDI Email Fetch Task can retrieve emails and can write them and their attachments to files. It does not require task queues to be running, and it will not update the Greentree database. It can be used for testing connections and retrieving but not processing emails. By default it does not delete emails after retrieving them but does mark them as read.

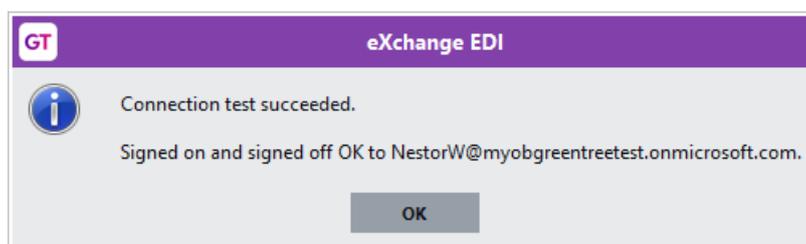
Ensure the company has at least one of the EDI modules turned on in Company Maintenance.

1. Use menu item System > eXchange EDI > Tools > Email Fetch Tasks.
2. Choose New
3. Enter Connection / Email Address: (your test user's email address)
4. For Save option pick *Both*
5. For To Directory pick a server directory
6. Select File Naming *Automatic*
7. Save the task.
8. Click Credentials, select authentication method and credentials as described in the section **Credentials**.



9. Click the Test button  to check the connection.

On success you'll see a message of this form:



10. Click the Perform Now button to retrieve email. This requires the EDI Processor to be running.