

Save Everything: *Fully Integrated Email with xTuple Connect*

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xTuple HQ

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Emailing with xTuple

- ▶ Emailing with xTuple requires xTuple Connect
- ▶ (1) Sending out Documents to Trading Partners
 - ▶ PO's to Vendors
 - ▶ Sales Order Acknowledgement to Customers
 - ▶ Invoices to Customers
 - ▶ Statements to Customers
 - ▶ Emails with Incident Management
- ▶ **(2) Integrated Email (CRM)**



Project

Number: Status:

Name:

CRM Account: Tremendous Toys Incorporated

Owner: Administrator

Assigned To: Administrator

Due:

Started:

Assigned:

Completed:

Name:

Phone: 703-931-4268 Title:

Alternate: Email: frankf@ttoys.com

Fax: 703-931-2212 Web:

-
-
-


- Tasks
- Additional
- Billing
- Notes
- Comments
- Documents
- Advanced
- Email

Number	Name	Description	Hours Balance	Expense Balance
10-Concept	Concept	Work with client to develop concept	20.00	500.00
20-Engineering	Engineering	Develop and approve design drawings	16.00	1,000.00
30-Tooling & Prot...	Tooling & Prototype	Procure tooling and build prototype	40.00	5,000.00
40-Pre-Production	Pre-Production	Build pre-production samples	40.00	5,000.00
50-Installation	Install Equipment	Develop marketing plan and materials	20.00	2,000.00

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-
-
-
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Clear Order #: 50245 Save and Add to Packing List Batch Save Close

Header Information Line Items Relationships Order Notes Comments Shipping Notes Documents Payment Email Commissions

Order #: 50245 Terms: 2-10N30-2% Discount in 10 Ds Ship Complete Print on Save 

Order Date: 6/28/13
Scheduled Date: 7/5/13 Commission: 0.00 % Site: WH1
Pack Date: 7/5/13 Tax Zone: VA TAX-Virginia Sales Tax Sale Type: ARCT-PHIL-Phil the Architect

Bill-To

Customer #: TTOYS

Name: Tremendous Toys Incorporated
Tremendous Toys Inc.
Street Address: 101 Toys Place

Country: United States
City: Walnut Hills State: VA Postal: 22209

Ship-To

Ship To# STORE1

Name: Olde Towne Store 1
Olde Towne Toys Store 1
Street Address: 1 Duke Street

Country: United States
City: Alexandria State: VA Postal: 22201

Name: Mr. Mike Farley
Phone: 703-931-4269 Title:
Alternate: Email: wallyton@xtuple.com
Fax: 703-931-2212 Web:

Name: Mr. Mike Farley
Phone: 703-931-4269 Title:
Alternate: Email: wallyton@xtuple.com
Fax: 703-931-2212 Web:

F.O.B.: Cust. PO #: Ship Via: UPS-GROUND-UPS Ground Hold Type: None Shipping Zone: DOMESTIC1 Shipping Chgs.: ADDCHARGE-Add Shipping Ch Shipping Form: SO-PackList

Account Number: TTOYS Active

Save

Account Name: Tremendous Toys Incorporated

Close

Type

Organization Individual

Parent:

Owner: admin Administrator

Roles

- | | | | | | |
|-------------------------------------|-------------|--------------------------|--------------|--------------------------|------------------|
| <input type="checkbox"/> | Prospect... | <input type="checkbox"/> | Sales Rep... | <input type="checkbox"/> | Tax Authority... |
| <input checked="" type="checkbox"/> | Customer... | <input type="checkbox"/> | Employee... | <input type="checkbox"/> | Competitor |
| <input type="checkbox"/> | Vendor... | <input type="checkbox"/> | User... | <input type="checkbox"/> | Partner |

Contacts Notes Comments Characteristics Activities Registrations Documents **Email**

Primary Secondary All

Name: Mr. Mike Farley

Title:

Phone: 703-931-4269

Tremendous Toys Inc.

Alternate: 101 Toys Place

Walnut Hills, VA 22209

Fax: 703-931-2212

United States

Email: wallyton@xtuple.com

Web:

Setting up xTuple Connect

- ▶ Let's gather the pieces you need:
 - ▶ xtConnect-3.7.1 – Linux.tar.bz2 (Linux)
 - ▶ xtConnect-3.7.1 – MACi386.dmg (OSX)
 - ▶ xtConnect-3.7.1 – Windows.zip (Windows)
 - ▶ xtConnect371.gz (all platforms)
 - ▶ xTuple-Updater – 2.2.5



We have the pieces, now what? (I)

- ▶ OSX Users – drag and drop ‘Batch Manager into Application folder
- ▶ Linux/Windows extract into chose folder
- ▶ Notice a folder called ‘Trojita’, this will go beside your xTuple application on all computers planning to use email integration



We have the pieces, now what? (2)

- ▶ Windows:

- ▶ xTuple directory= C:\\Program Files\\xTuple-4.1.0\\xTuple.exe

- ▶ Trojita = C:\\Program Files\\xTuple-4.1.0\\trojita

- ▶ OSX:

- ▶ xTuple directory = /Users/xtuple/Desktop/xtuple.app

- ▶ Trojita = /Users/xtuple/Desktop/trojita



We have the pieces, now what? (3)

- ▶ Linux:
- ▶ Linux is slightly different, 'trojita' must be renamed to 'xtconnect'
 - ▶ xTuple directory - /home/xtuple/Desktop/xTuple-4.1.0/xtuple
 - ▶ Trojita - /home/xtuple/Desktop/xTuple-4.1.0/xtconnect



Installing the Package

- ▶ Navigate to your xTuple-Updater-2.2.5 previously downloaded
- ▶ Open the updater and connect to your xTuple database
- ▶ Install the package 'xtconnect371.gz'
- ▶ That's it!
 - ▶ Let's dive into using xtConnect



Turning Email Sync'ing on

- ▶ On **System Set Up** Screen, select xTuple connect
 - ▶ Enable
- ▶ Navigate to xTuple **Preferences** in xTuple ERP
- ▶ Select the 'Email' Tab
- ▶ Click 'Start Trojita Email Client'
- ▶ Navigate to **Preferences** and fill in the IMAP user name/password/server information for the user's Email Account



Module: System

xTuple Connect

- ▼ Configure
 - Database
 - Credit Card
 - Encryption
 - Import/Export
 - Search Path
 - xTuple Connect**
 - Registration
- ▼ Master Information
 - Calendars
 - Comment Types
 - Countries
 - Currencies
 - Exchange Rates
 - Departments
 - EDI Profiles
 - Forms
 - Images
 - Label Forms
 - Locales
 - States and Provinces

xTuple Connect Enabled

Default From Email Address: allyton@openfmg.com

Purge Jobs after: Never days

Automatically Create Contacts During Email Sync

Exclude Contacts Matching:

Pattern

New
Edit
Delete

Apply

Cancel

Save



User Preferences

Current User

Selected User:

admin

Save

Cancel

Apply

Application Menu Hot Keys Events Alarms Password Advanced Email

Synchronize Email while running application

Start Now

Stop Now

Start Trojita Email Client

You've Got Mail!

- ▶ You should now see email populating into the Trojita client! Hooray! (we're not done yet)
- ▶ From your selection of folders, chose which ones you **WANT** to synchronize with xTuple
 - ▶ Suggest starting with a “xTuple Mail” or “Work Mail” folder
 - ▶ Right Click on this Folder, select Synchronize with xTuple
 - ▶ Close out of Trojita, you don't need to use it again



The Email Tabs

- ▶ Navigate back to xTuple Preferences
- ▶ Select the Email Tab
- ▶ Check 'Synchronize Email while running application'
- ▶ Click 'Start Now' button
- ▶ Save
- ▶ Start seeing emails in the Email Tabs!



User Preferences

Current User

Selected User:

admin

Save
Cancel
Apply

Application | Menu | Hot Keys | Events | Alarms | Password | Advanced | **Email**

Synchronize Email while running application

Start Now Stop Now


Start Trojita Email Client

Private Reply

- INBOX (1792)
- Admin
- Apple Mail To Do
- AZ-Hosted Demos (2)
- BizDev
- Competition
- Customers
- Deleted Messages (1)
- Deleted Messages (xtuple im...)
- Documents
- Done
- Drafts (50)
- Inat'l
- Junk (xtuple imap)
- LocalsOnly
- Campostella
- DrLucy
- Hobb
- Phil C
- Vanw
- Mktg
- Notes
- OpenRPT
- Personal
- Prospec
- Sent Me
- Services
- VAR Folders
- xTuple-Out (3)
- ZZ-Archive

Subject	From	Date	Size

- Create Child Mailbox...
- Delete Mailbox
- Check for New Messages
- Update List of Child Mailboxes
- Subscribed
- Synchronize with xTuple
- Reload Everything
- Show Only Subscribed Folders



Trojita

a Qt IMAP e-mail client

Welcome to Trojita. Please be sure to report any bugs or problems which you might hit in any of the following ways:

- ▶ Use KDE's [bugzilla](#)
- ▶ Send a mail to the project's [mailing list](#)
- ▶ IRC at Freenode, channel #trojita ([connect via web](#))

Enjoy your mail!



You're Done, but...

- ▶ If you are not seeing the emails, you are expecting to see, here are a few tips:
 - ▶ Turn on the Database Log (System->View Database Log)
 - ▶ This will show the active connection and any SQL errors that may be happening
 - ▶ Open Tojita, navigate to the settings wrench
 - ▶ Click the xTuple Tab and ensure your folders to sync are listed
 - ▶ On that same tab, note the “debugging” check box; checking this will help further diagnose any problems
 - ▶ This feature recommended for Advanced Users



Contacts

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