



Go Green

email Receipts

Microsoft Retail Management System

Installation Guide



# RMS Email Receipts Add In

## Microsoft Retail Management System

### Installation Guide

## Before you begin....

To ensure a smooth installation setup, please read the three points below:

- 1) You will require your RMS Database connection information. This is the exact same information that you will find in Store Operations Administrator which you can open to obtain the settings (Open Store Operations Administrator → Click File → Click Configuration)
- 2) You will require an email address, email password, STMP Server Name and STMP Port number
- 3) Perform your installation between 9am-5pm Eastern time so that you can obtain your license. (more on this in preceding pages)
- 4) You must be able to log in to the computer as an Administrator.
- 5) If your RMS version is lower than 2.0.1000 you must download and install Microsoft SQL 2012 CLR types from <http://www.microsoft.com/en-ca/download/details.aspx?id=35580> (ENU\x64\SQLSysClrTypes.msi or ENU\x86\SQLSysClrTypes.msi)

## Download

Click the link below to download the RMS Email Receipt

<http://tricityretail.com/Resources/RMS AddIns/RMSEmailReceiptsSetup-Store.zip>

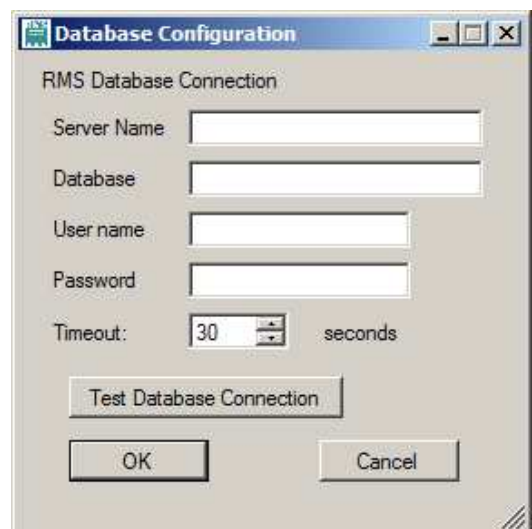
## Installation

Extract the files from the zip file then right-click RMSEmailReceiptsSetup-x.x.x.x.exe and choose “Run as Administrator”.

Follow the prompts to install. Once launched, you will see a screen similar to the one pictured below. You will need to fill out the server name, database, user name and password for your RMS Database. Once you’ve filled in the fields, click “Test Database Connection” to verify your settings.

This is the exact same information that you will find in Store Operations Administrator which you can open to obtain the settings (Open Store Operations Administrator → Click File → Click Configuration)

Click OK. The next screen show will be the configuration screen. Should you need to access this setup again, you can access it from the Database Configuration button.



The image shows a 'Database Configuration' dialog box. It has a title bar with the text 'Database Configuration' and standard window controls. Below the title bar, the text 'RMS Database Connection' is displayed. There are four text input fields: 'Server Name', 'Database', 'User name', and 'Password'. Below these fields is a 'Timeout' field with a spinner set to '30' and the unit 'seconds'. At the bottom of the dialog are three buttons: 'Test Database Connection', 'OK', and 'Cancel'.

# Configuration

The screenshot shows a configuration window titled "RMS Email Receipts Addin Configuration". It features several input fields and checkboxes. The "Email sent from" section includes fields for "Email address", "Email username", "Reply to", "Email password", "SMTP Server", and "SMTP Port", along with a "Use SSL" checkbox. The "Email Subject Line" and "Email Comment" fields are at the top. The "Receipt Template File" and "Logo Image File" fields have "Browse" buttons. The bottom of the window has "OK" and "Cancel" buttons. On the right side, there are three buttons: "Database Setup", "Program License", and "Send Test Email". There are also three checkboxes: "Prompt before sending email" (checked), "Ignore customers with no email address" (checked), and "Do not prompt to save email address" (unchecked). A text box labeled "Session variables to include (in order)" contains the example "3, 5, 2, 1".

## Email Subject Line

This text will appear in the subject line of the email. Example:

[Your receipt from \(Store Name\)](#)

## Email Comment

This text will appear in the body of the email. Example:

[Thank-you for shopping at \(Store Name\)](#)

[Check out our amazing deals at www.yourstoreweb.com](#)

## Email sent from Setup

The following fields will be required and can usually be obtained from your ISP or existing email setup.

- Email Address
- Email Username
- Reply to
- Email Password
- SMTP Server
- SMTP Port
- Use SSL (Optional)

**Option: Prompt before sending email**

Check this on if you want to be prompted prior to sending the email to the customer. You will be provided an option to send the email or not.

**Option: Ignore customers with no email address**

Check this on if you want to skip the request to send the email to a customer that does not have an email address on file already.

**Option: Do not prompt to save email address**

Check this on if you do not want the cashier prompted to save the email address. A change of email address will not be saved in the customer information if this option is checked.

**Receipt Template File**

Click the browse button and navigate to the directory referenced below to locate "RMSReceipt.rdl"

32 Bit Computer

C:\Program Files\Microsoft Retail Management System\Store Operations\AddIns\RMS Email Receipts Addin

64 Bit Computer

C:\Program Files (x86)\Microsoft Retail Management System\Store Operations\AddIns\RMS Email Receipts Addin

**Logo Image File**

Click the browse button to locate a logo image to include on your receipt.

**Session Variables to Include**

This feature is only required for users who have other add in applications that use the RMS session variables. Most users can leave this area blank. See the troubleshooting section for more information on session variables.

## Program License

Click the "Program License" button. This will reveal an "Auto-generated license ID". You can obtain your license either calling Tri-City Retail Systems (1-877-877-4767) or by emailing your license code to [license@tricityretail.com](mailto:license@tricityretail.com) (please include your store name and the "Auto Generated License ID). Type or copy your license code from Tri-City Retail Systems into the License Code box.

Click Validate to verify the license code and click Close to Exit.



The image shows a software dialog box titled "Program License". It features a close button (X) in the top right corner. The dialog contains the following elements:

- A label "Auto-generated License ID:" followed by a text box containing the alphanumeric string "123456789012345678901".
- A label "License Code:" followed by an empty text box.
- Two buttons at the bottom: "Validate" and "Close".

# Troubleshooting

## Troubleshooting Email Accounts

In the event that your email account is not working we recommend testing with a Gmail account. Below are all the steps required to set it up.

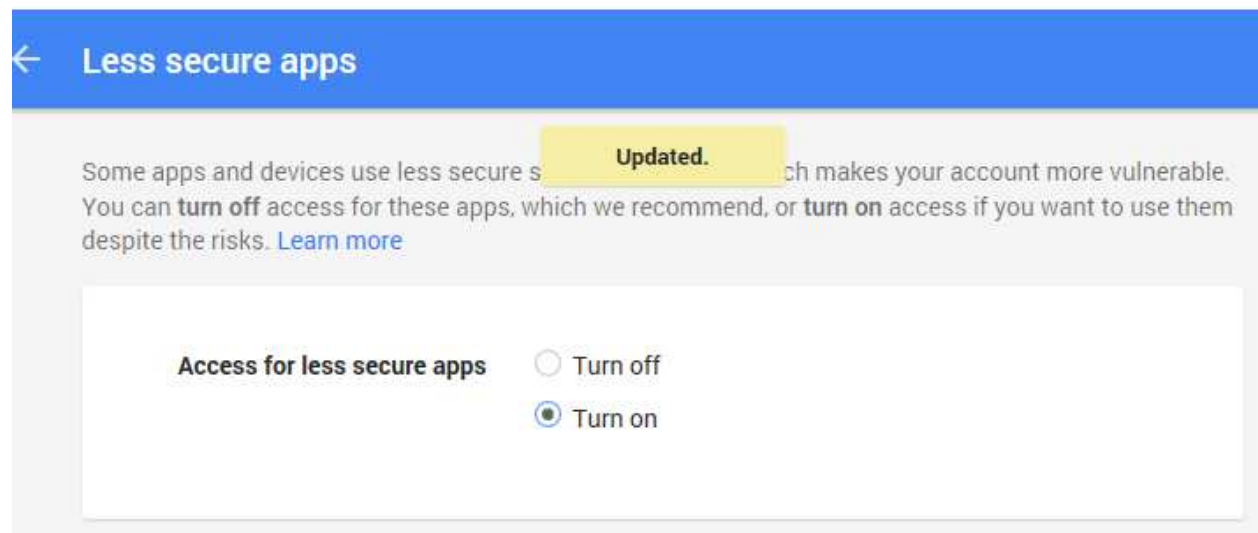
Step 1: Go to [www.gmail.com](http://www.gmail.com) to setup a Gmail account if you do not already have one. If you do have a Gmail Account it is recommended that you verify your password

Step 2: Modify your Gmail account to allow access from less secure applications. This setting must be set to "Turn On"

If you see the message box below, you do not have Access for less secure apps turned on.



Go to <https://www.google.com/settings/security/lesssecureapps> and Turn On access for less secure apps.



Step 3: Setup your Gmail account in configuration.

Email Address: (your Gmail email)

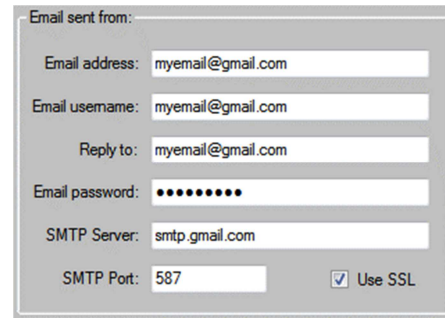
Email Username (your Gmail email)

Reply To: (either your Gmail email or another email where customers can reach you)

SMTP Server: smtp.gmail.com

SMTP Port: 587

Use SSL: Checked on



Email sent from:

Email address: myemail@gmail.com

Email username: myemail@gmail.com

Reply to: myemail@gmail.com

Email password: ●●●●●●●●

SMTP Server: smtp.gmail.com

SMTP Port: 587  Use SSL

Now it's time to test! If your test fails, continue onto the final step to determine if you can connect to the SMTP Server.

If the Telnet Client is not already enabled, you'll first need to enable the Telnet feature:

1. Click the Start button, then Control Panel, and Programs.
2. Click Turn Windows Features On or Off.
3. If you are prompted for an administrator password or confirmation, type the password or provide confirmation.
4. In the Windows Features box, check the box labeled Telnet **Client**, and click OK. (It may take a few minutes for the installation to complete.)

To run the telnet test on a Windows computer:

5. Open the Start menu, and select Run.
6. Enter command in the Open: field, and click OK.
7. Enter 'telnet smtp.gmail.com 465,' and hit Enter, or if you're using Outlook 2007, enter 'telnet smtp.gmail.com 587' instead. (Does the information in the prompt window clear? If not, please note the message that appears.)
8. Close the prompt window.

### Troubleshooting Session Variables

In the event that you are using an RMS add in that uses session variables you will need to request a customized receipt if you wish to show the information stored in the session variables on your email receipt. Some examples of add ins that use custom variables are:

Semi Integrated Credit Authorization for Global Payments in Canada (defaults 1,2)

Semi Integrated Credit Authorization for Chase Paymentech in Canada (defaults 1,2)

Givex add in (defaults varies with edition)

Moneris Credit Card Authorization (defaults varies with edition)