

# Emailing in RentalPoint

Last Modified on 03/06/2022 2:21 pm EDT

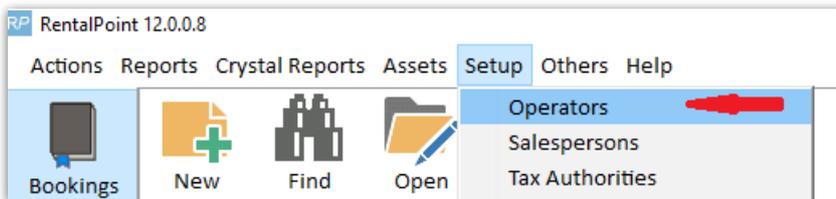
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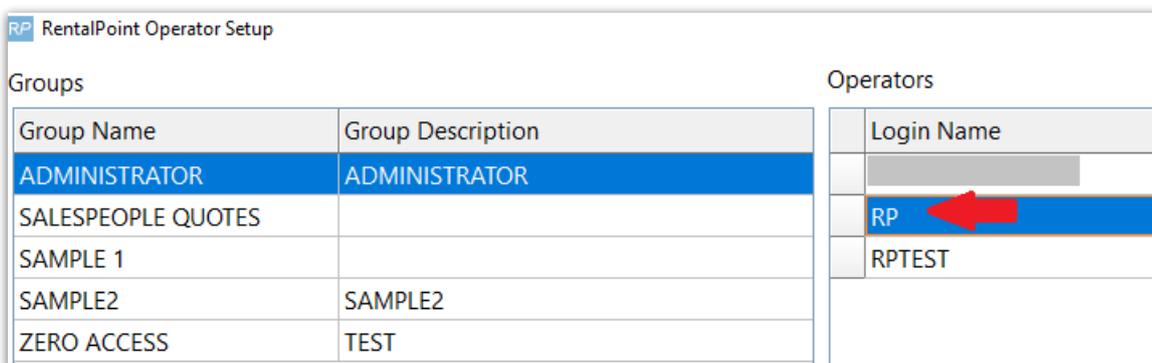
## Accessing Email Configuration

 [Email Settings available](#) (i.e. 'Company', 'Custom' and 'Location')

Email configuration can be found in each operator record per screenshots below.



Double Click the operator Login Name to edit the record



The screenshot shows the RentalPoint Operator Setup screen. It features two tables: 'Groups' and 'Operators'. The 'Operators' table has a red arrow pointing to the 'RP' login name.

Group Name	Group Description
ADMINISTRATOR	ADMINISTRATOR
SALESPEOPLE QUOTES	
SAMPLE 1	
SAMPLE2	SAMPLE2
ZERO ACCESS	TEST

Login Name
RP
RPTEST

RP Edit Operator Record : RP

Operator Settings    Multi Location Operator Groups    Auto Emailing

GROUP : ADMINISTRATOR

First Name    Rental

Last Name    Point

Group (default)    ADMINISTRATOR

Login Name    RP

Password    ●●●●●●●●●●    Show

Mobile Password

Must assign booking to PO before saving   

Maximum PO Approval Amount    1,000,000.00

Maximum Cross Rental Approval Amount    1,000,000.00

Maximum Rental Discount %    100.000000

Maximum Sales Discount %    100.000000

Booking Product Treeview Options

Open While Adding and Editing

Always Open

Closed until user opens it

Default Location    0 - Toronto

Default Division    2 - Production

Default Project Manager    MMF

Email settings    Use Custom Email Settings

Email Address    myaddress@gmail.com

SMTP Address(Host)    smtp.gmail.com

SMTP Port    587    SSL/TLS    TLS

My smtp server requires authentication

Send Test Email

Clear Stored Password

Copy from Company Email Settings

Copy from Location Email Settings

WEB Language    English

System Administrator     Disable Login

OK    Cancel

## Discontinued configuration on RentalPoint Cloud Servers

Per our recent email to affected users; on the 8th December 2020, the third party service used in the configuration below will be closed down in its current format, and should therefore be removed from any operator records that currently use it.

If you are using the settings below in your RentalPoint email configuration, please take a moment to review the other configurations outlined, then contact support@rentp.com with the necessary information (i.e. which email system you are using, and if you have 2FA turned on), should you need further assistance.

Email settings    Use Custom Email Settings

Email Address    myaddress@mycompany.com

SMTP Address(Host)    127.0.0.1

SMTP Port    25    SSL/TLS    Not used

My smtp server requires authentication

Send Test Email

Clear Stored Password

Copy from Company Email Settings

Copy from Location Email Settings

OR

Email settings	Use Custom Email Settings ▾		
Email Address	myaddress@mycompany.com		
SMTP Address(Host)	localhost		
SMTP Port	25	SSL/TLS	Not used ▾
<input type="checkbox"/> My smtp server requires authentication			
Send Test Email			
Clear Stored Password			
Copy from Company Email Settings			
Copy from Location Email Settings			

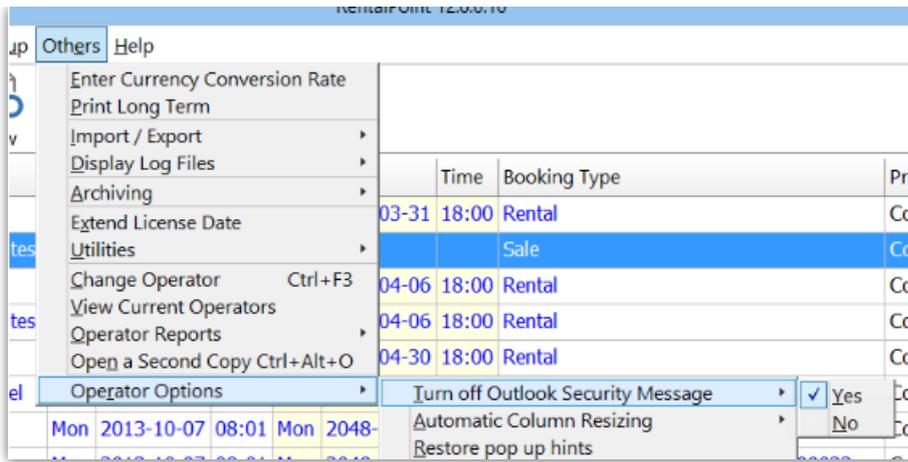
## Outlook

- If you have Outlook configured on your workstation/server account, then you can leave email configuration in RentalPoint blank in order to avail of your Outlook settings.
- When you leave your email settings in RentalPoint blank, RentalPoint will look to the outlook settings on your workstation and use those

Email settings	Use Custom Email Settings ▾		
Email Address			
SMTP Address(Host)			
SMTP Port		SSL/TLS	Not used ▾
<input type="checkbox"/> My smtp server requires authentication			
Send Test Email			
Clear Stored Password			
Copy from Company Email Settings			
Copy from Location Email Settings			

Each operator has an option to turn off the Outlook Security Message pop-up that appears before each email sent...

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## Office365

 Your company setting in Office 365 email accounts for Multi-Factor Authentication (MFA), also known as Two Factor Authentication (2FA), will affect your email configuration in RentalPoint. If in doubt about your setting, please check with your IT Company / person. Alternatively, try the configuration settings below 'without MFA' and consult your IT person if they do not work for you.

### Without Multi-Factor Authentication (MFA)

#### Option 1:

- If you have Outlook configured on your workstation to use Office 365, then no setup is needed. RentalPoint will use your Outlook settings

#### Option 2:

- Email Address: myaddress@mycompany.com {i.e. Full email address of the user}
- SMTP Server: smtp.office365.com
- SMTP Port: 587 TLS
- Tick the box for 'My SMTP Server requires authentication'

Email settings	Use Custom Email Settings	
Email Address	myaddress@mycompany.com	
SMTP Address(Host)	smtp.office365.com	
SMTP Port	587	SSL/TLS TLS
<input checked="" type="checkbox"/> My smtp server requires authentication		
		
		
		
		

See password verification for next steps.

### With Multi-Factor Authentication (MFA)

If you have MFA / 2FA turned on for your email then the above options will not work. Instead you'll need to use

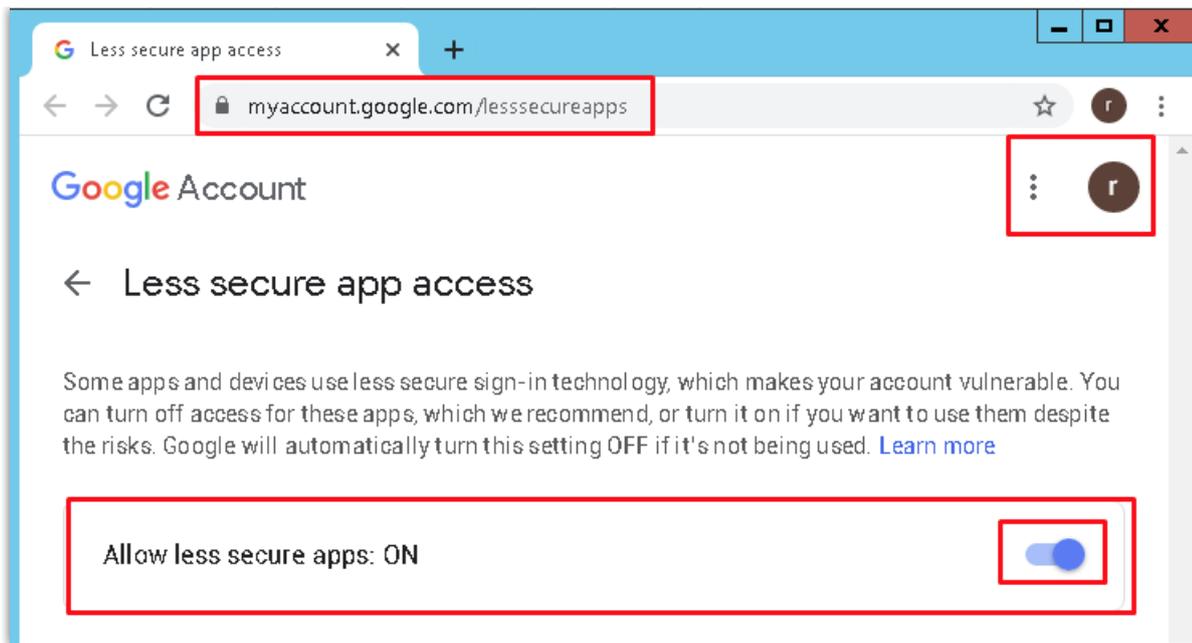
"Option 3: Configure a connector to send mail using Microsoft 365 or Office 365 SMTP relay" outlined in the Microsoft document at this link: <https://docs.microsoft.com/en-us/exchange/mail-flow-best-practices/how-to-set-up-a-multifunction-device-or-application-to-send-email-using-microsoft-365-or-office-365>

This will take your IT Company / person some time to set up. RentalPoint support cannot perform this task for you. Once completed, your IT person can change the details in your RentalPoint Operator record to use your newly configured settings.

## Google Workspace (G Suite)

 Your company setting for 2-Step Verification/Two Factor Authentication (2FA) will affect your email configuration in RentalPoint. Options 1 and 2 below require 'Allow less secure apps: ON' in your Google Account via [myaccount.google.com/lesssecureapps](https://myaccount.google.com/lesssecureapps)

- If you are using 2-Step Verification/Two Factor Authentication (2FA), you will not be permitted to turn on less secure apps and will need to follow Option 3 below
- When Google discontinue the option to turn on less secure apps (target date March 2021), you will need to follow option 3 below



## With 'Allow less secure apps: ON' in your Google Account

### Option 1:

- Email Address: myaddress@gmail.com {i.e. Full email address of the user}
- SMTP Server: smtp.gmail.com
- SMTP Port: 587 TLS
- Tick the box for 'My SMTP Server requires authentication'

A screenshot of an email settings form. The 'Email settings' dropdown is set to 'Use Custom Email Settings'. The 'Email Address' field contains 'myaddress@gmail.com', the 'SMTP Address(Host)' field contains 'smtp.gmail.com', and the 'SMTP Port' field contains '587'. The 'SSL/TLS' dropdown is set to 'TLS'. The checkbox 'My smtp server requires authentication' is checked. Below the form are buttons for 'Send Test Email', 'Clear Stored Password', 'Copy from Company Email Settings', and 'Copy from Location Email Settings'.

### Option 2:

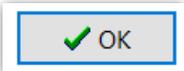
- Email Address: myaddress@gmail.com {i.e. Full email address of the user}
- SMTP Server: smtp.gmail.com
- SMTP Port: 465 SSL
- DO NOT Tick the box for 'My SMTP Server requires authentication'

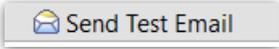
## When using 2-Step Verification/Two Factor Authentication (2FA)

Option 3:

How to confirm 2-Step Verification is already turned on:

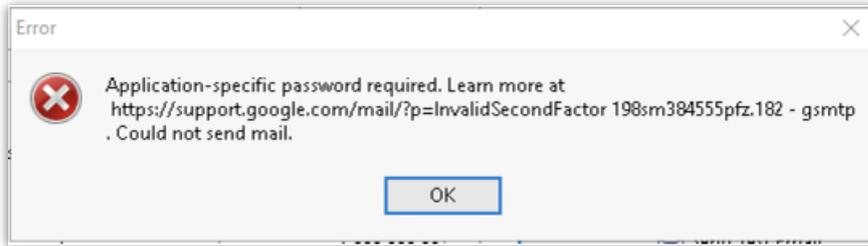
1. Configure your operator record for Gmail using a valid gmail address and the following settings (see email configuration above for complete steps to access this record)

2. Click  to save the details

3. Then edit/open the operator record again and click 

Either you will receive a test email from RentalPoint in your inbox confirming that your configuration is complete and working successfully, OR ....

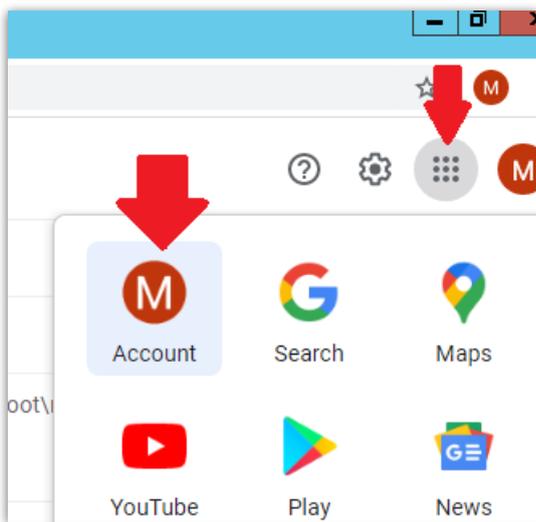
You will get an error something like the screenshot below. If you get this error message, then you know that your account has 2-Step Verification turned ON (effectively 2FA by another name).



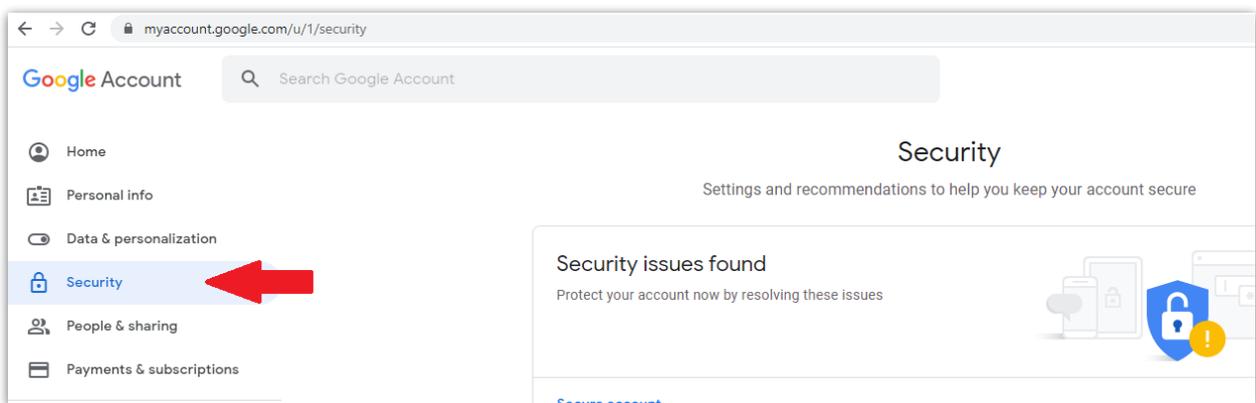
## How to set up 2-Step Verification/Two Factor Authentication (2FA) on Google Suite

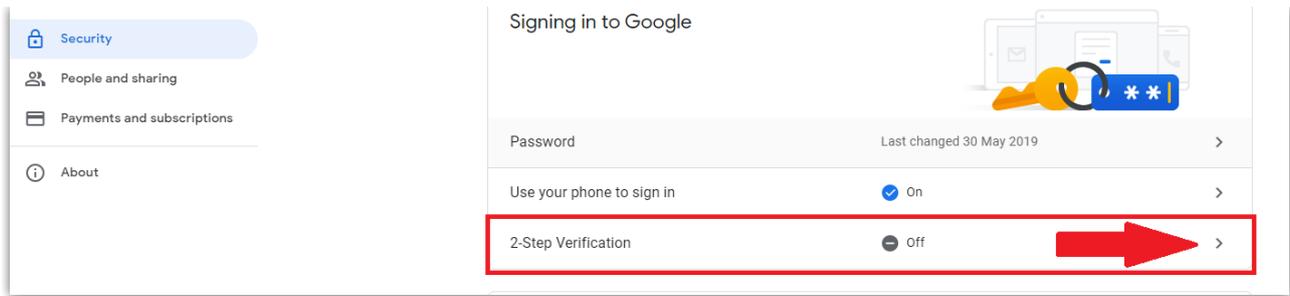
 If you don't have an option in your Gmail settings to turn on 2FA, your administrator will need to provide this option from your company's GSuite Admin account for the domain you are using < [Google info on how to turn on 2FA for your domain account](#) >

From your Gmail account...

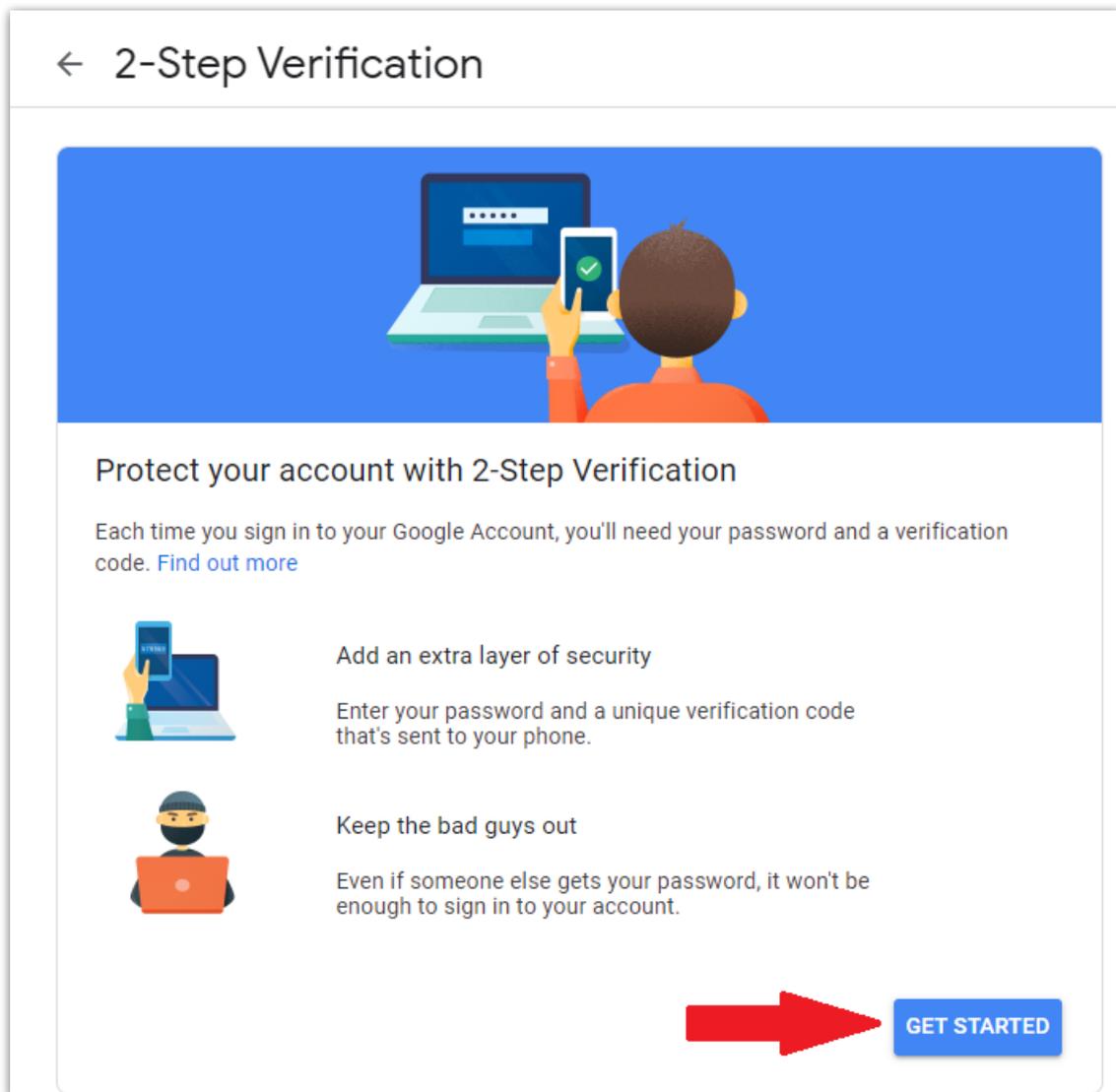


Under the security tab, scroll down to find the 2 Step Verification option





Follow the prompts to set up 2 Step Verification



Once set up is complete, move on to setting up an App password.

## Setting up an App Password

Under the security tab, scroll down to find App passwords and follow the prompts (if you have trouble finding this section, see instructions under setting up 2FA above)

Security

- People & sharing
- Payments & subscriptions
- About

### Signing in to Google



Password Last changed Jan 2, 2019 >

2-Step Verification  On >

App passwords 2 passwords  >

## ← App passwords

App passwords let you sign in to your Google Account from apps on devices that don't support 2-Step Verification. You'll only need to enter it once so you don't need to remember it. [Learn more](#)

Your app passwords

Name	Created	Last used	
RentalPoint	Jan 11	Jan 11	
Mail on my Windows Computer	Jan 11	-	

Select the app and device you want to generate the app password for.

1.  Select app

Select device ▼

2.  Other (*Custom name*)

Mail

Calendar

Contacts

YouTube

GENERATE

## ← App passwords

App passwords let you sign in to your Google Account from apps on devices that don't support 2-Step Verification. You'll only need to enter it once so you don't need to remember it. [Learn more](#)

### Your app passwords

Name	Created	Last used	
RentalPoint	Jan 11	Jan 11	
Mail on my Windows Computer	Jan 11	-	

Select the app and device you want to generate the app password for.

 RentalPoint 

 **GENERATE**

### Generated app password

Your app password for your device

 **owpy gtqj yggu gmnq**

How to use it

Go to the settings for your Google Account in the application or device you are trying to set up. Replace your password with the 16-character password shown above.

Just like your normal password, this app password grants complete access to your Google Account. You won't need to remember it, so don't write it down or share it with anyone.

**DONE**

In RentalPoint, Go to Setup-->Operators and edit the operator record

- Email Address: Full email address of the user

- SMTP Server: smtp.gmail.com
- SMTP Port: 587 TLS
- Tick the box for 'My SMTP Server requires authentication'
- Clear the stored password
- SAVE the record then log out of RentalPoint and back in again, then follow the steps in Password Verification below using the app password you generated above instead of your regular email password. The app password is specifically for use in RentalPoint operator settings, when logging into your email you will still use your regular email credentials.

The screenshot shows the 'Edit Operator Record : RPTTEST' window. The 'Email settings' section is highlighted with a red box. The 'Clear Stored Password' button is indicated by a red arrow.

**Operator Settings**

GROUP : ADMINISTRATOR

First Name: rptest

Last Name: [Empty]

Group (default): ADMINISTRATOR

Login Name: RPTEST

Password: [Masked] Show

Mobile Password: [Masked]

Must assign booking to PO before saving:

Maximum PO Approval Amount: 100,000,000.00

Maximum Cross Rental Approval Amount: 1,000,000,000.00

Maximum Rental Discount %: 100.000000

Maximum Sales Discount %: 100.000000

Booking Product Treeview Options

- Open While Adding and Editing
- Always Open
- Closed until user opens it

**Email settings**

Default Location: 0 - Toronto

Default Salesperson: [Empty]

Default Project Manager: [Empty]

Email settings: Use Custom Email Settings

Email Address: [Masked]@gmail.com

SMTP Address(Host): smtp.gmail.com

SMTP Port: 587 SSL/TLS: TLS

My smtp server requires authentication

Send Test Email

Clear Stored Password

Copy from Company Email Settings

Copy from Location Email Settings

WEB Language: English

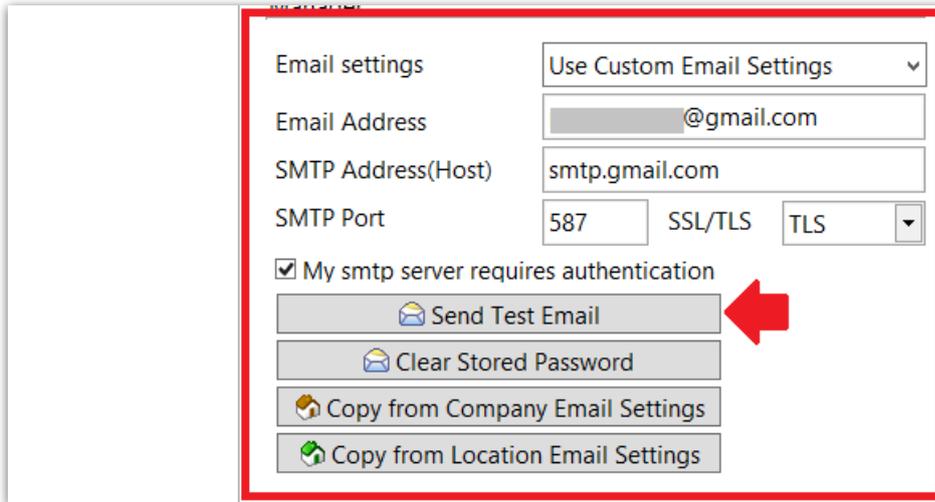
System Administrator  Disable Login

OK Cancel

## Password Verification

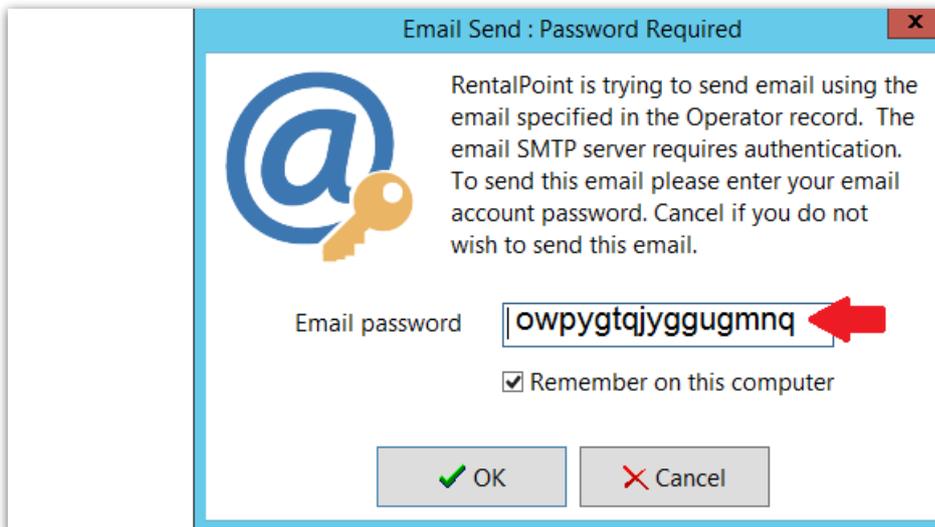
- When password verification is needed it will be launched when RentalPoint attempts to send the first email using new configuration settings; the user will be prompted for their password, which can be saved for future use.
- Alternatively, once you have saved your email configuration settings, click 'Send Test Email' for testing and password verification
- If you have changed your email password for any reason, use the 'Clear Stored Email

Password' option outlined below in order to re-activate Password Verification.



The screenshot shows an email settings configuration window. A red rectangular box highlights the following elements: the 'Email settings' dropdown menu (set to 'Use Custom Email Settings'), the 'Email Address' field (containing '@gmail.com'), the 'SMTP Address(Host)' field (containing 'smtp.gmail.com'), the 'SMTP Port' field (containing '587'), the 'SSL/TLS' dropdown menu (set to 'TLS'), and the 'My smtp server requires authentication' checkbox (checked). Below these fields are four buttons: 'Send Test Email', 'Clear Stored Password', 'Copy from Company Email Settings', and 'Copy from Location Email Settings'. A red arrow points to the 'Send Test Email' button.

If using Gmail 2 Step Verification, then enter the App password(see steps above), otherwise use your regular email password. Click Remember on this computer and OK.



The screenshot shows a dialog box titled 'Email Send : Password Required'. It features a blue '@' symbol with a yellow key icon. The text inside the dialog reads: 'RentalPoint is trying to send email using the email specified in the Operator record. The email SMTP server requires authentication. To send this email please enter your email account password. Cancel if you do not wish to send this email.' Below the text is an 'Email password' input field containing the text 'owpygtqjyggugmnq'. A red arrow points to this input field. Below the input field is a checked checkbox labeled 'Remember on this computer'. At the bottom of the dialog are two buttons: 'OK' (with a green checkmark icon) and 'Cancel' (with a red 'X' icon).

## Clear Stored Email Password

The option below clears the stored email password for the current RentalPoint Operator

Others Help

Enter Currency Conversion Rate  
Print Cycle billed

Import / Export  
Display Log Files

Archiving  
Extend License Date  
Utilities

Change Operator Ctrl+F3  
View Current Operators  
Operator Reports  
Open a Second Copy Ctrl+Alt+O

Operator Options

Admin Financials Print Rel

	Date	Time	Show Name
ed	12/12/2018	00:00	
ed	5/12/2018	10:38	
	8/12/2018	00:00	
	7/12/2018	00:00	
	8/12/2018	00:00	
	14/12/2018	00:00	
	22/12/2018	00:00	
ed	Wed 12/12/2018	00:00	Sat
ed	Thu 13/12/2018	00:00	Fri
ed	Thu 13/12/2018	00:00	Fri
ed	Thu 13/12/2018	00:00	Th
ed	Fri 14/12/2018	00:01	Fri

Turn off Outlook Security Message  
Automatic Column Resizing  
Restore pop up hints  
Directory for Carbon Copy Documents  
Change Password and Operator Defaults  
Clear stored email password

## Distribution Lists & Auto Emailing



