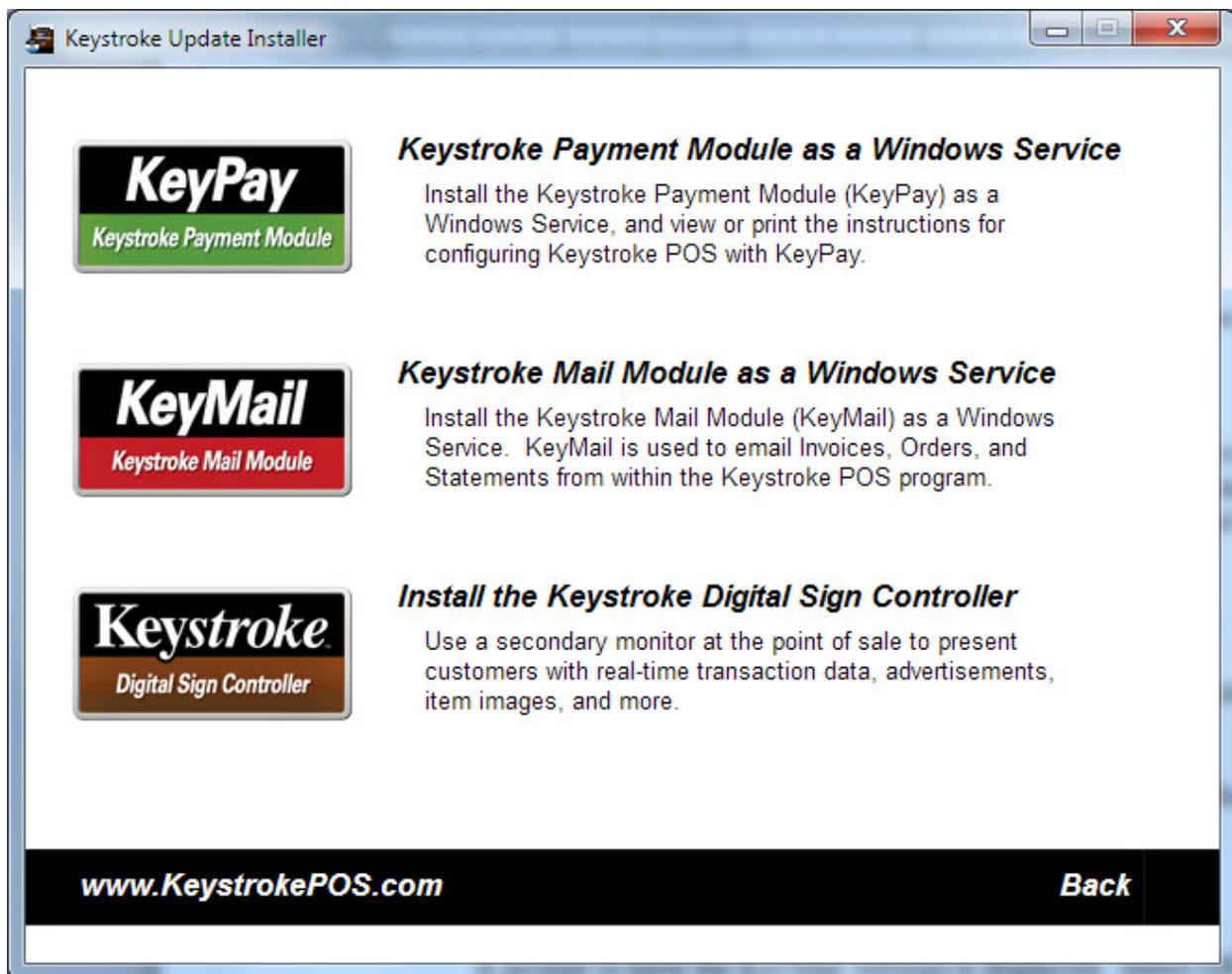


Installing the KeyMail Service

In a typical installation, the Keystroke Mail Module Service (“the KeyMail Service”) will be installed in the same location as the Keystroke POS program. This is usually on the Keystroke Server (C:\Keystrok).

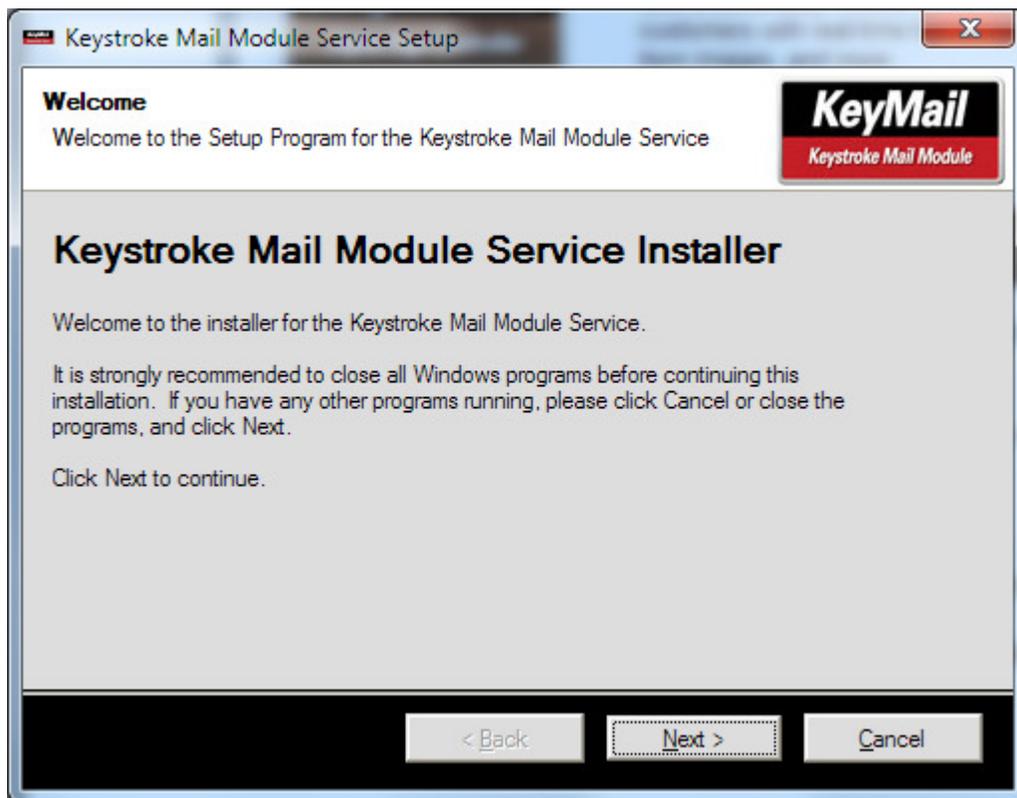
Use the Keystroke Update Installer to install KeyMail:

- 1) In Windows, go to the Start Menu and locate the Keystroke POS shortcut folder, and run the Keystroke Update Installer.
- 2) In the Keystroke Update Installer, select Keystroke Extensions.
- 3) Select Keystroke Mail Module as a Windows Service to download and start the KeyMail installer.



Specialized Business Solutions – Installing the KeyMail Service

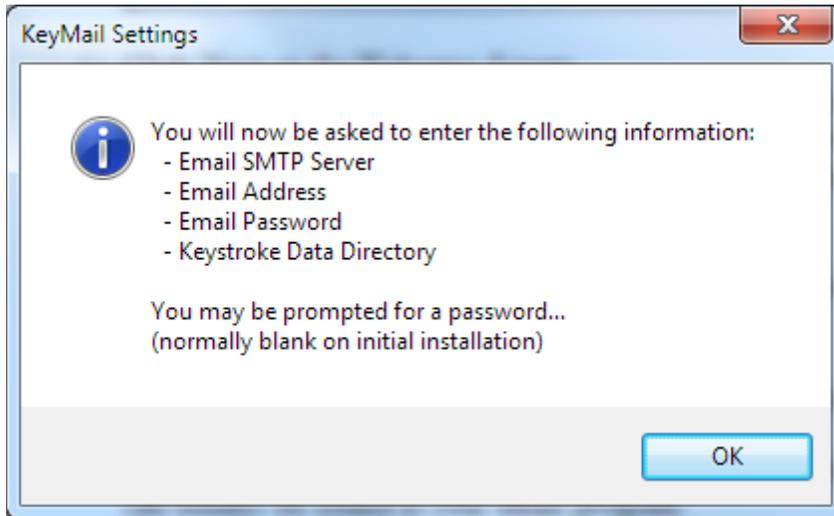
When the Keystroke Mail Module Service Installer is downloaded, it will start automatically.



- 1) Click Next on the Welcome Screen.
- 2) Agree to the Terms of the License Agreement and select Next.
- 3) Verify the install location, typically C:\Keystrok, and select Next.
- 4) Verify the shortcut folder, typically Keystroke POS. Make Shortcuts Available to All Users should be enabled. Select Next.
- 5) Confirm the install settings and select Next.

Specialized Business Solutions – Installing the KeyMail Service

- 6) During the Installation, a prompt to enter the KeyMail Settings is displayed. Select OK.



- 7) A prompt for password is displayed. The default Password is blank. So just leave the Password Blank, and select OK.



Specialized Business Solutions – Installing the KeyMail Service

- 8) The settings screen for the Keystroke Mail Module is displayed. Email settings are applied here (see the last page of this document for Common Settings).

Keystroke Mail Module - Settings

Settings ID: (Default) Add ID...

Process Through: Email

SMTP Server: mail.WEBSITE.com

Port #: 587 This server requires a secure connection (SSL)

Account Name: YourName@WEBSITE.com

Password:

From Name: YourName

From Email: YourName@WEBSITE.com

Also send to (BCC): Test

Data Directory: C:\KS7\DATA\

Status Directory: C:\KS7\DATA\

IP Address: (leave blank for automatic)

IP Port Number: 0 (leave as 0 for automatic)

Check for NIC Address Changes

Password: Save Cancel

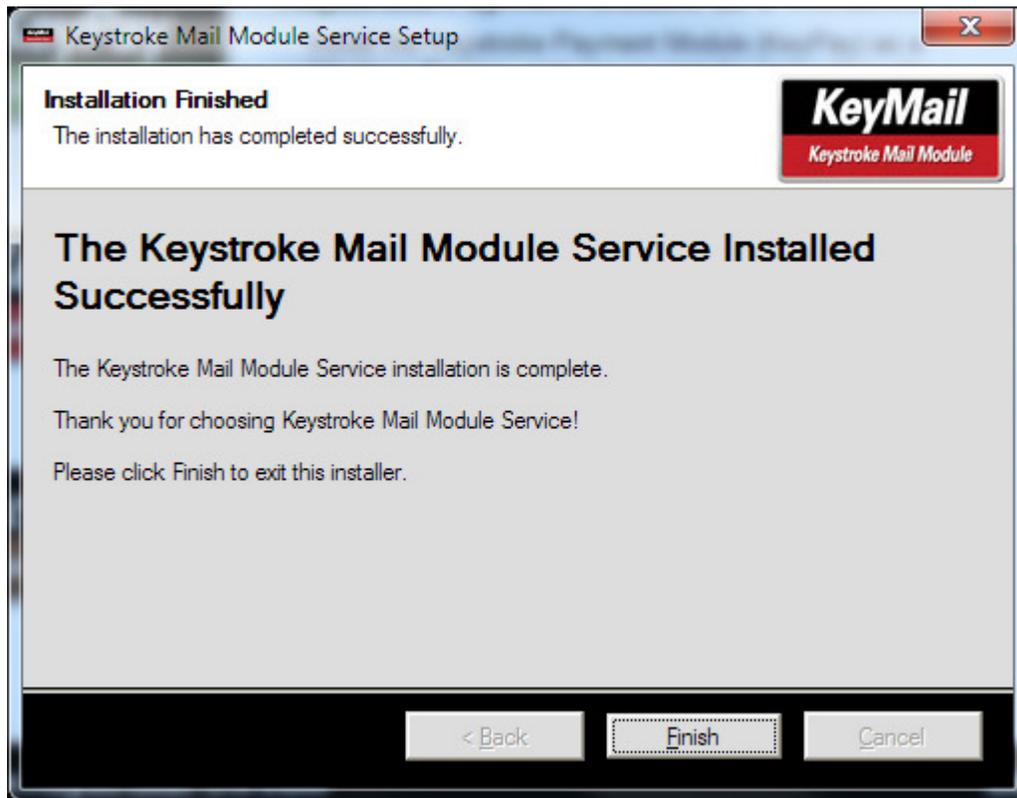
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KeyMail settings:

- Settings ID: Usually left as Default.
- Process through is set to Email.
- SMTP Server: This is the outgoing mail server. (See “Common Email Provider Settings” at the end of this document).
- Port #: Normally a port number will be assigned by KeyMail based upon the server SMTP name (i.e. SMTP=smtp.gmail.com will use Port # 465 and turn on “This server requires a secure connection (SSL)”. KeyMail should recognize your SMTP server and select an appropriate port.
- Account Name/Password: The credentials used to log into your email.
- From Name/Email: This information will appear in the email header. Note that some email providers will always use your account information and not use the KeyMail settings.
- Data/Status Directories: These directories will usually be set to the working data directory on the Keystroke server (c:\keystrok\data).
- The Remaining settings such as IP Address and IP Port Number, and Check for NIC Changes can typically be left blank.
- Select Save to save your settings.

Specialized Business Solutions – Installing the KeyMail Service

- 9) The KeyMail installer will indicate that the service was installed successfully. Select Finish.



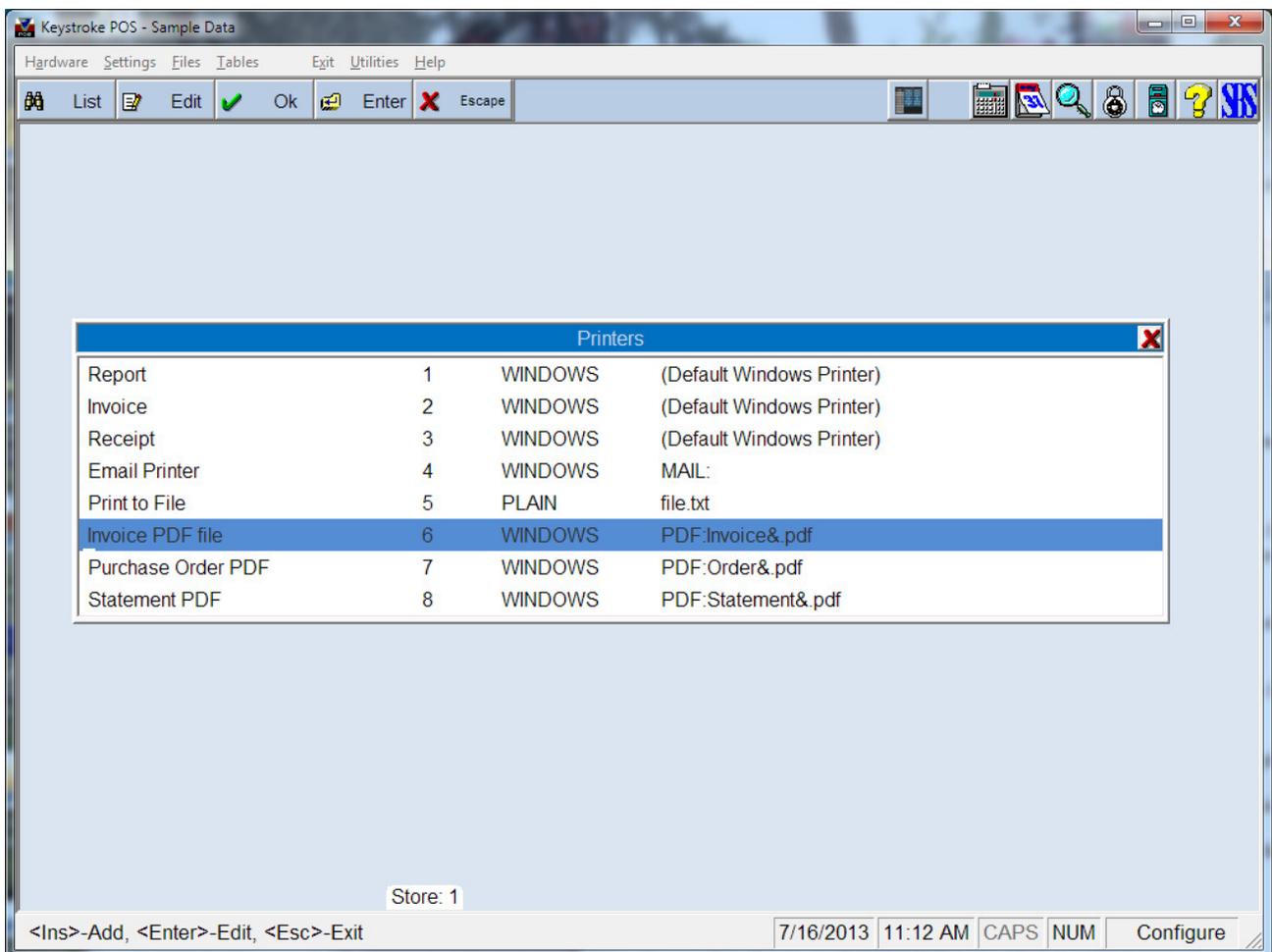
You are now ready to setup PDF Printers and Email Print Buttons in Keystroke POS.

Emailing forms as PDF attachments in Keystroke

Emailing from Keystroke requires setting up printing to a PDF file, and then sending the PDF as an email using the KeyMail Module.

Add a printer in Keystroke to print forms to PDF file:

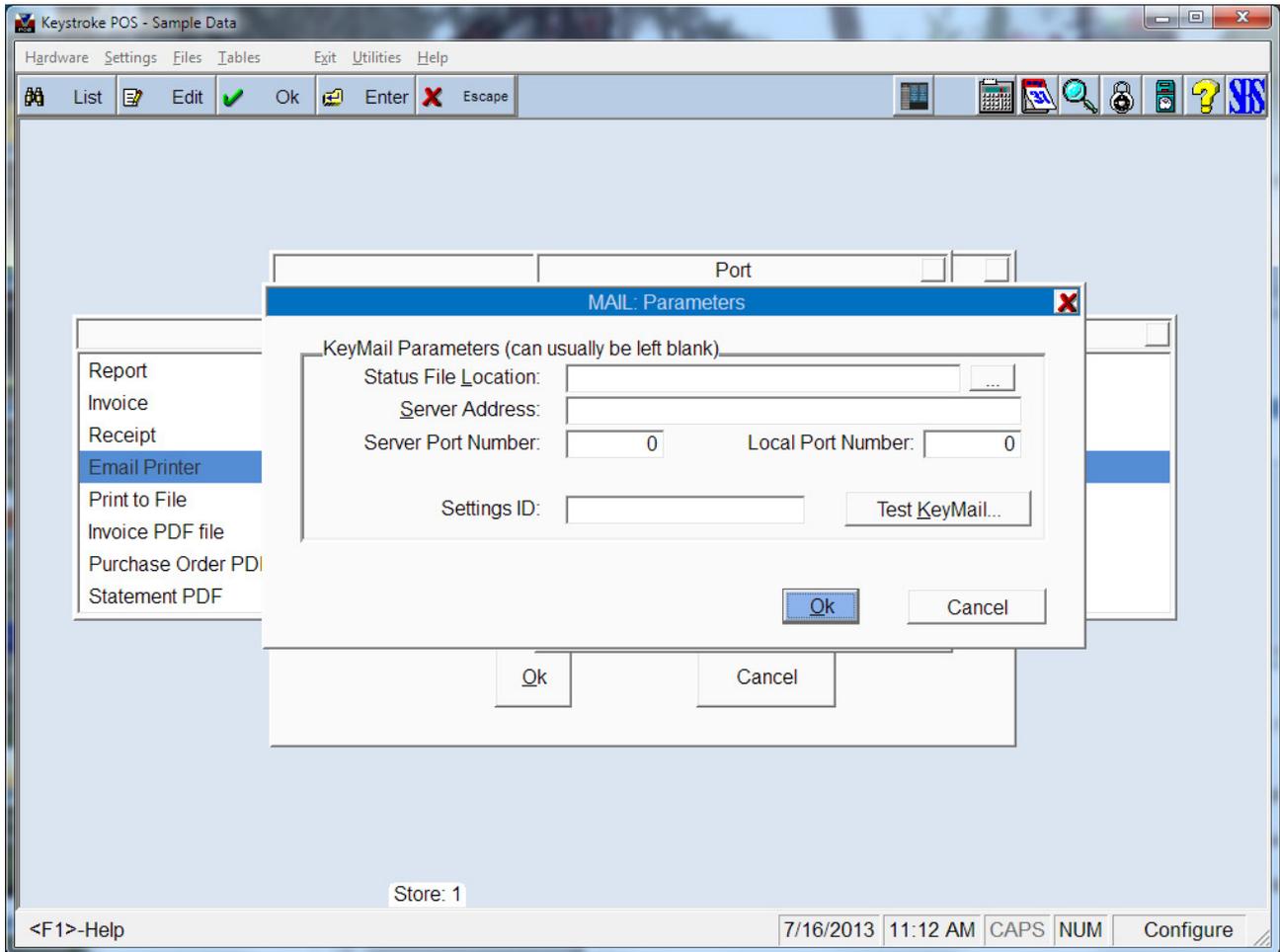
- 1) In Configuration Manager, under Hardware, Printers, add a new printer by hitting INS.
- 2) Name the printer “Invoice PDF File” (will be used for emailing Sales Invoices).
- 3) Set driver to Windows and set the Port to PDF and assign the filename “**Invoice&.pdf**”
Note: Use **Order&.pdf**, **Statement&.pdf**, etc. for printers used to print other forms to PDF files.



Specialized Business Solutions – Installing the KeyMail Service

Add a printer in Keystroke to send the Email.

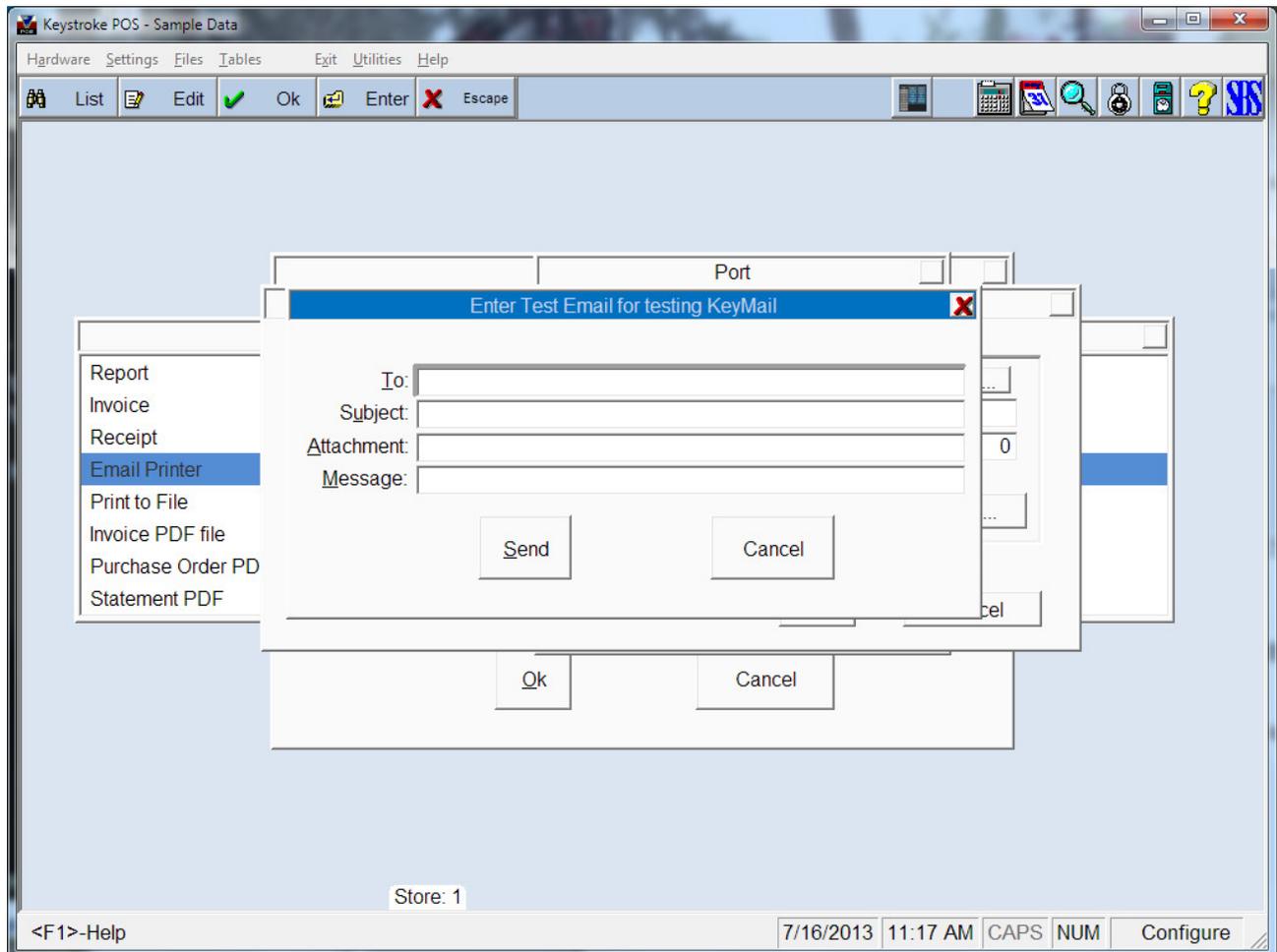
- 1) In Configuration Manager, under Hardware, Printers, add a new printer by hitting INS.
- 2) Name the printer Email Printer.
- 3) Set the driver to Windows and set the Port to Mail. The Mail: Parameters screen is displayed. In a typical installation, all of these parameters can all be left blank.



- 4) Select the Test KeyMail button. This function will first verify communication between Keystroke and the KeyMail module then prompt you to enter a test email. If you get errors at this point, it might be related to your Firewall (Keystroke POS uses TCP/IP to send requests to KeyMail). You might try turning off the Firewall for testing purposes. If needed, add KeyMail.exe, KMailSvc.exe, and Keystrok.exe to your “allowed applications”.

Specialized Business Solutions – Installing the KeyMail Service

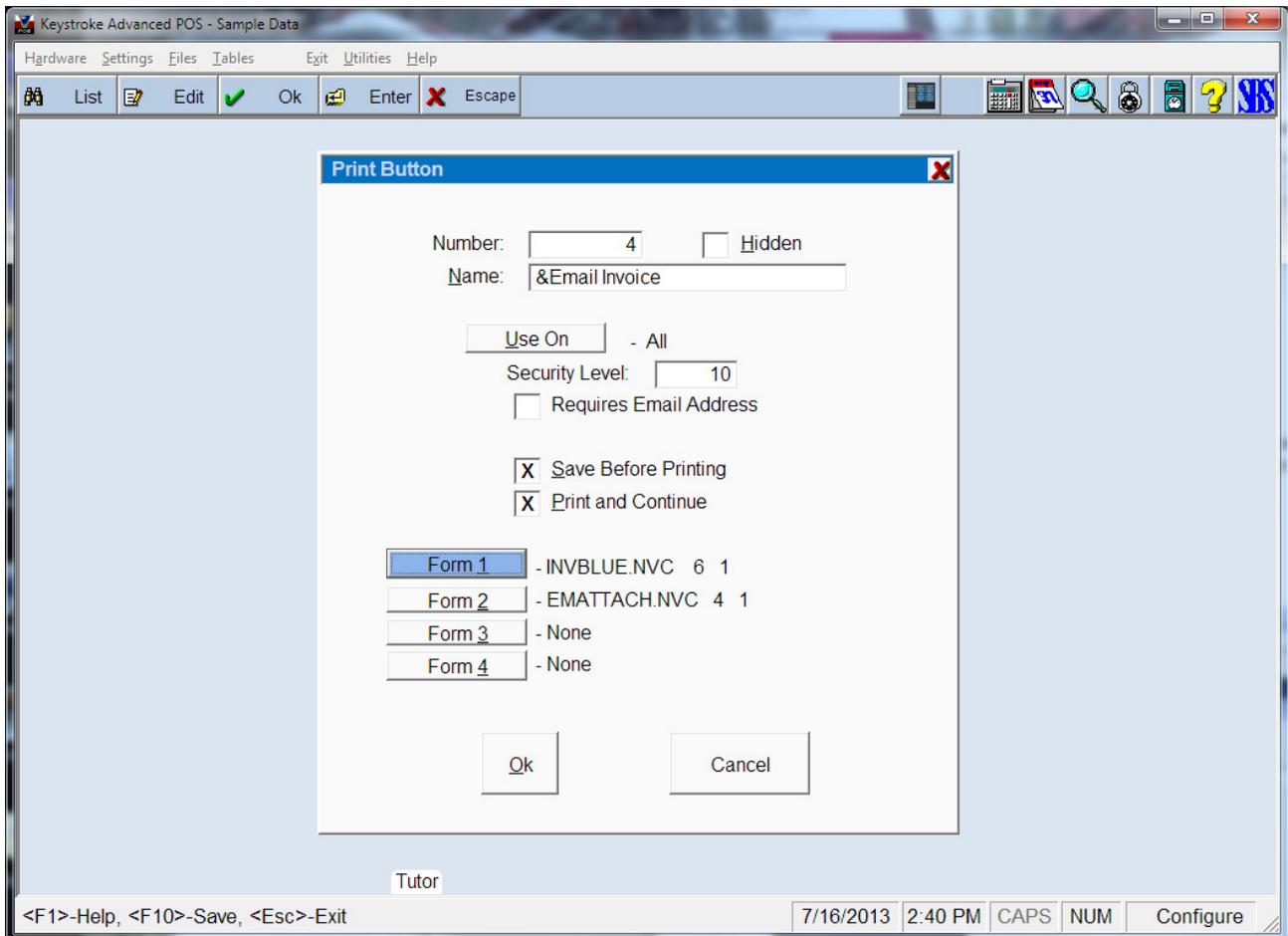
- 5) Enter an email address, subject, and message and select Send to verify that Keystroke can send an email through the KeyMail Service.



Specialized Business Solutions – Installing the KeyMail Service

Create a Print Button for Emailing Invoices as PDF Attachments

- 1) In Configuration Manager, go to Tables, Print Buttons.
- 2) Select SM: Sales and then hit enter on Add New Button.
- 3) Assign a name to the button like “&Email Invoice”.
- 4) Select Form 1.
- 5) Select File and select forms like INVGREEN.NVC (other forms are listed).
- 6) Select Printer and then select the “Invoice PDF File” printer setup above.
- 7) Select OK
- 8) Select Form 2.
- 9) Select File and select the form EMATTACH.NVC.
- 10) Select Printer and then select the “Email Printer” setup above.
- 11) Select OK, and then select OK again to save this print button.
- 12) F10 one last time to save all of the Print Buttons.



Setup Form Messages in Configuration Manager (Settings-Form Messages):

Form Messages are used to customize the body section used when Emailing Forms

| | |
|-----------------------------|----------------------------------|
| Email Body (Sales): | Lines 40, 41, 42, 43, 44, and 45 |
| Email Body (Purchasing): | Lines 50, 51, 52, 53, 54, and 55 |
| Email Body (AR Statements): | Lines 60, 61, 62, 63, 64, and 65 |
| Email Body (ROA Payments): | Lines 70, 71, 72, 73, 74, and 75 |

Specialized Business Solutions – Installing the KeyMail Service

You are now ready to do a test in Sales Manager.

- 1) Create a new Sales Invoice.
- 2) Create a customer for yourself, with your own email address on it.

The screenshot displays the 'Keystroke Advanced POS - Sample Data' application window. The main window title is 'Sales Invoice' and the sub-window title is 'Customer Main Screen'. The interface includes a menu bar (Transaction, Customer, Special, Exit, Utilities, Help) and a toolbar with icons for List, Edit, Ok, Enter, and Escape. The form contains the following fields and controls:

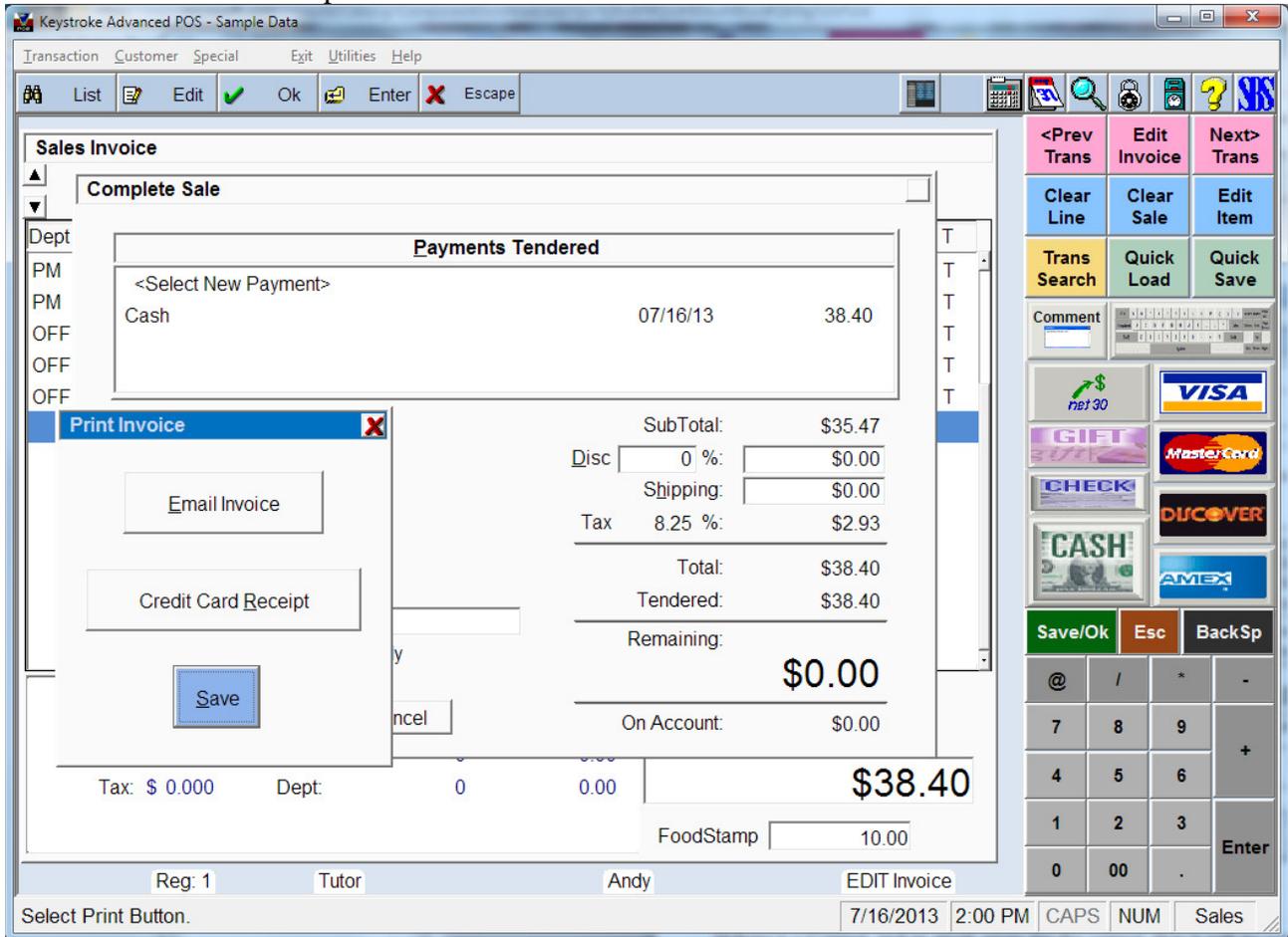
- Customer Code: SBS (highlighted), Number: 30
- First Name: [Empty], Salut: [Empty], Class: [Empty]
- Last Name: [Empty], Title: [Empty]
- Business Name: Specialized Business Solutions
- Lookup Name: Specialized Business Solutions
- Billing Address: [Empty], Alt: [Empty], Country: [Empty], Residential:
- Price Table: *, Preferred:
- Tax Table: *
- Payment: 0, Req PO:
- Credit Limit: \$0.00, Print Stmtns:
- Grace Period: 0, Email:
- Total: \$38.40
- Amount Due: \$0.00
- Phone: 800-275-4727, Ph2: [Empty]
- Fax: [Empty]
- Email: eSupport@KeystrokePOS.com
- Note: [Empty]
- Birthdate: [Empty], Age: [Empty], Salesperson: [Empty]
- Buttons: Contacts, AltCodes, More Data, Custom
- Footer: Reg: 1, Tutor, Andy, EDIT Invoice, 7/16/2013 1:59 PM, CAPS, NUM, Sales

On the right side of the window, there is a vertical toolbar with various buttons: <Prev Trans, Edit Invoice, Next> Trans, Clear Line, Clear Sale, Edit Item, Trans Search, Quick Load, Quick Save, Comment, and a numeric keypad. Below the numeric keypad are buttons for Save/Ok, Esc, and BackSp. At the bottom right, there are buttons for @, /, *, -, 7, 8, 9, 4, 5, 6, 1, 2, 3, 0, 00, ., and Enter.

- 3) Add this customer to the transaction
- 4) Enter some line items
- 5) Tender a payment

Specialized Business Solutions – Installing the KeyMail Service

6) Select the Email Invoice print button.



If all is setup correctly, you should receive an email from your company with the attached PDF file.

Notes:

The Customer Email on the transaction will be used. If there is a Customer Contact, and an email exists for the Customer Contact, then it will be used instead of the Customer Email.

KeyMail Settings – Common Email Provider Settings

During the KeyMail Installation (or using the KeyMail Settings icon), you will be asked to enter various email information regarding the email address, username, and password of the email account that you want KeyMail to process emails through. The values for these settings can usually be found in the email program you are currently using. Below are default settings for common email providers.

Gmail settings:

- Gmail SMTP Server Address: smtp.gmail.com
- Gmail Port: 465
- Gmail Secure SSL Required: Yes/On
- Gmail User Name: your full Gmail Email Address (e.g. myemail@gmail.com)
- Gmail Password: your Gmail Password

Hotmail settings:

- Hotmail SMTP Server Address: smtp.live.com
- Hotmail Port: 587
- Hotmail Secure SSL Required: No/Off (some might require this to be On)

- Hotmail User Name: your full Windows Live Email Address (e.g. myemail@hotmail.com)
- Hotmail Password: your Hotmail Password

MSN settings:

- MSN SMTP Server Address: smtp.live.com
- MSN Port: 587
- MSN Secure SSL Required: No/Off (some might require this to be On)
- MSN User Name: your full Windows Live Email Address (e.g. myemail@msn.com)
- MSN Password: your MSN Password

Windows Live Mail settings:

- Windows Live SMTP Server Address: smtp.live.com
- Windows Live Port: 587
- Windows Live Secure SSL Required: No/Off (some might require this to be On)
- Windows Live User Name: your full Windows Live Email Address (e.g. myemail@live.com)
- Windows Live Password: your Windows Live Password

Yahoo! Mail settings:

- Yahoo! SMTP Server Address: smtp.mail.yahoo.com

- Yahoo! Port: 465
- Yahoo! Secure SSL Required: Yes/On
- Yahoo! User Name: your full Yahoo! Email Address (e.g. myemail@yahoo.com)
- Yahoo! Password: your Yahoo! Password