

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).

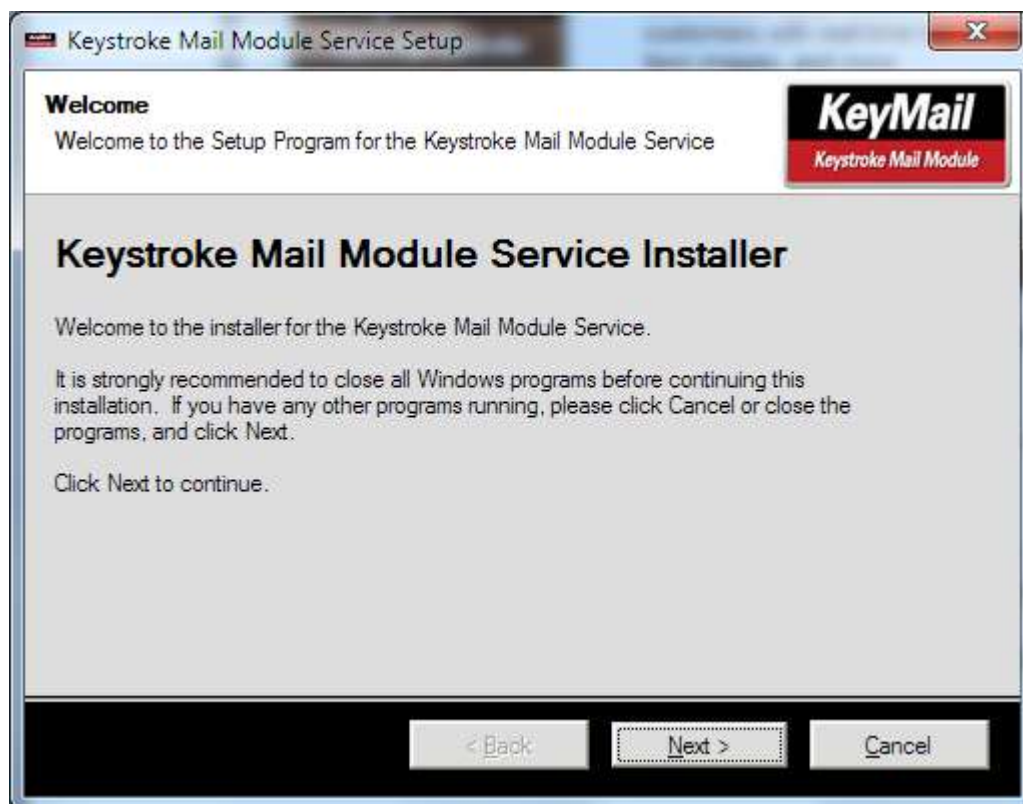
Use the Keystroke Update Installer to install KeyMail:

- 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.



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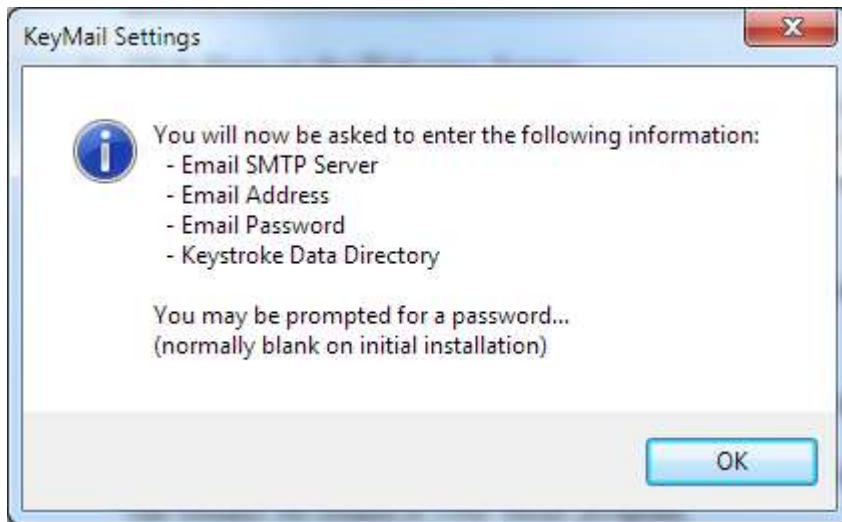
When the Keystroke Mail Module Service Installer is downloaded, it will start automatically.



- 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.

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- 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.



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- 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).

The screenshot shows the 'Keystroke Mail Module - Settings' dialog box. It features a title bar with a close button and a version number 'v8.00.87'. The main area contains several sections of settings:

- Settings ID:** A dropdown menu set to '(Default)' with an 'Add ID...' button.
- Process Through:** A dropdown menu set to 'Email'.
- SMTP Server:** A text box containing 'smtp.gmail.com'.
- Port #:** A text box containing '587' and a checkbox for 'Use SSL (Leave Off for TLS)' which is unchecked.
- Account Name:** A text box containing 'YourEmail@gmail.com'.
- Password:** A text box containing '*****'.
- From Name:** A text box containing 'YourName'.
- From Email:** A text box containing 'YourEmail@gmail.com'.
- Reply To Name (opt):** A text box containing 'ReplyName'.
- Reply To Email (opt):** A text box containing 'YourReplyEmail@gmail.com'.
- Also send to (BCC):** An empty text box.
- Data Directory:** A text box containing 'C:\KEYSTROKE\DATA'.
- Status Directory:** A text box containing 'C:\KEYSTROKE\DATA'.
- Attachments Directory:** A text box containing 'C:\KEYSTROKE'.
- IP Address:** An empty text box with '(leave blank for automatic)' to its right.
- IP Port Number:** A text box containing '0' with '(leave as 0 for automatic)' to its right.
- Check for NIC Address Changes:** An unchecked checkbox.
- Test...:** A button located to the right of the 'Also send to (BCC)' field.
- Save/Cancel:** A 'Save' button (highlighted with a dashed border) and a 'Cancel' button at the bottom.
- Password:** An empty text box at the bottom left.

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 # 587 and turn off “Use SSL (Leave Off for TLS).
- 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.
- Replay To Name/Email (optional): You can specify a different reply name than the From Name.
- Data/Status/Attachments Directories: These directories will usually be set to the working data directory on the Keystroke server (C:\Keystrok\Data\).
- Attachments Directory: This directory will usually be set to the program directory (C:\Keystrok) and is where PDF files are printed to using standard forms (EMATTACH.NVC, etc.)
- 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.

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- 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.

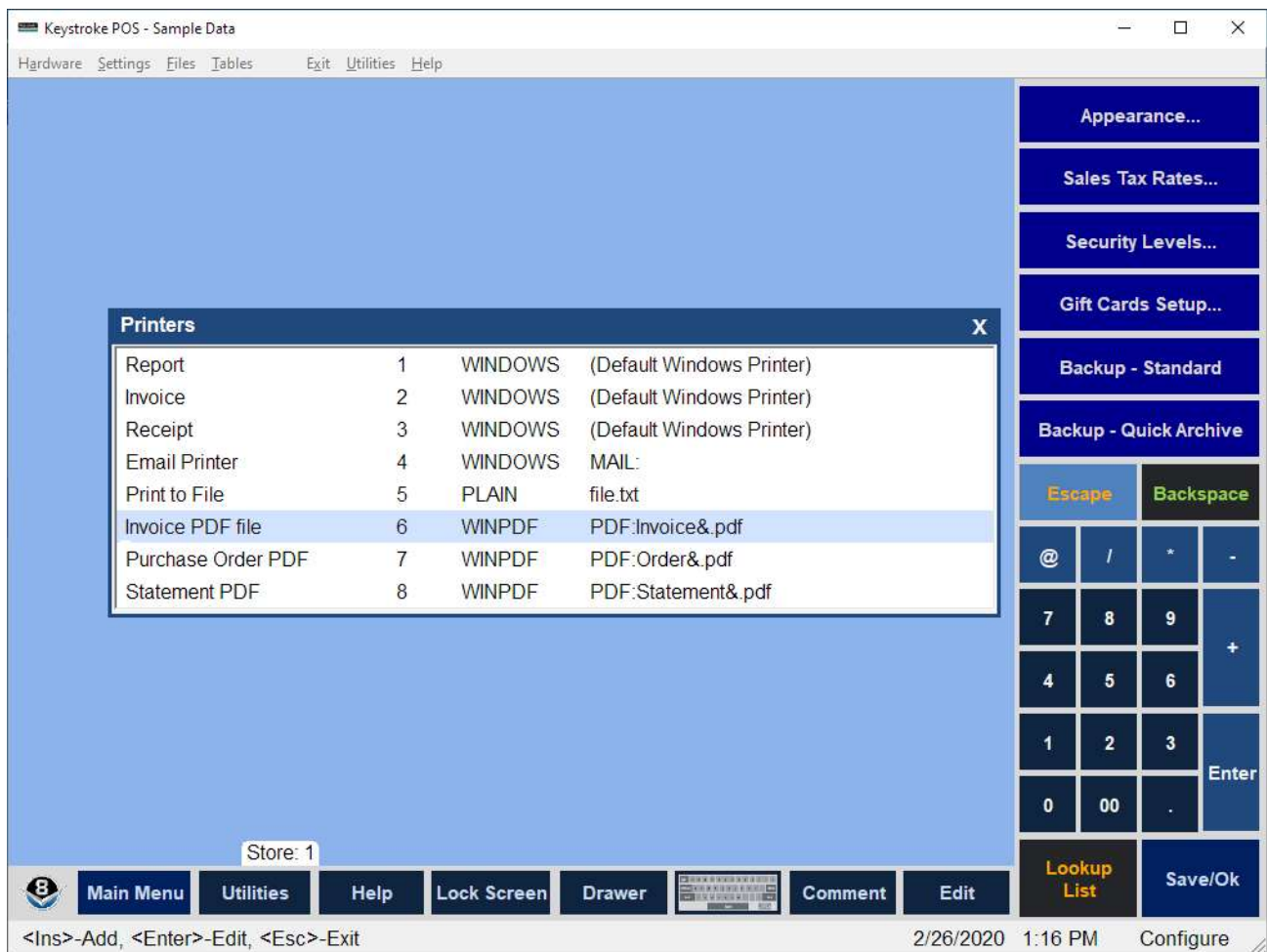
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Emailing forms as PDF attachments in Keystroke

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:

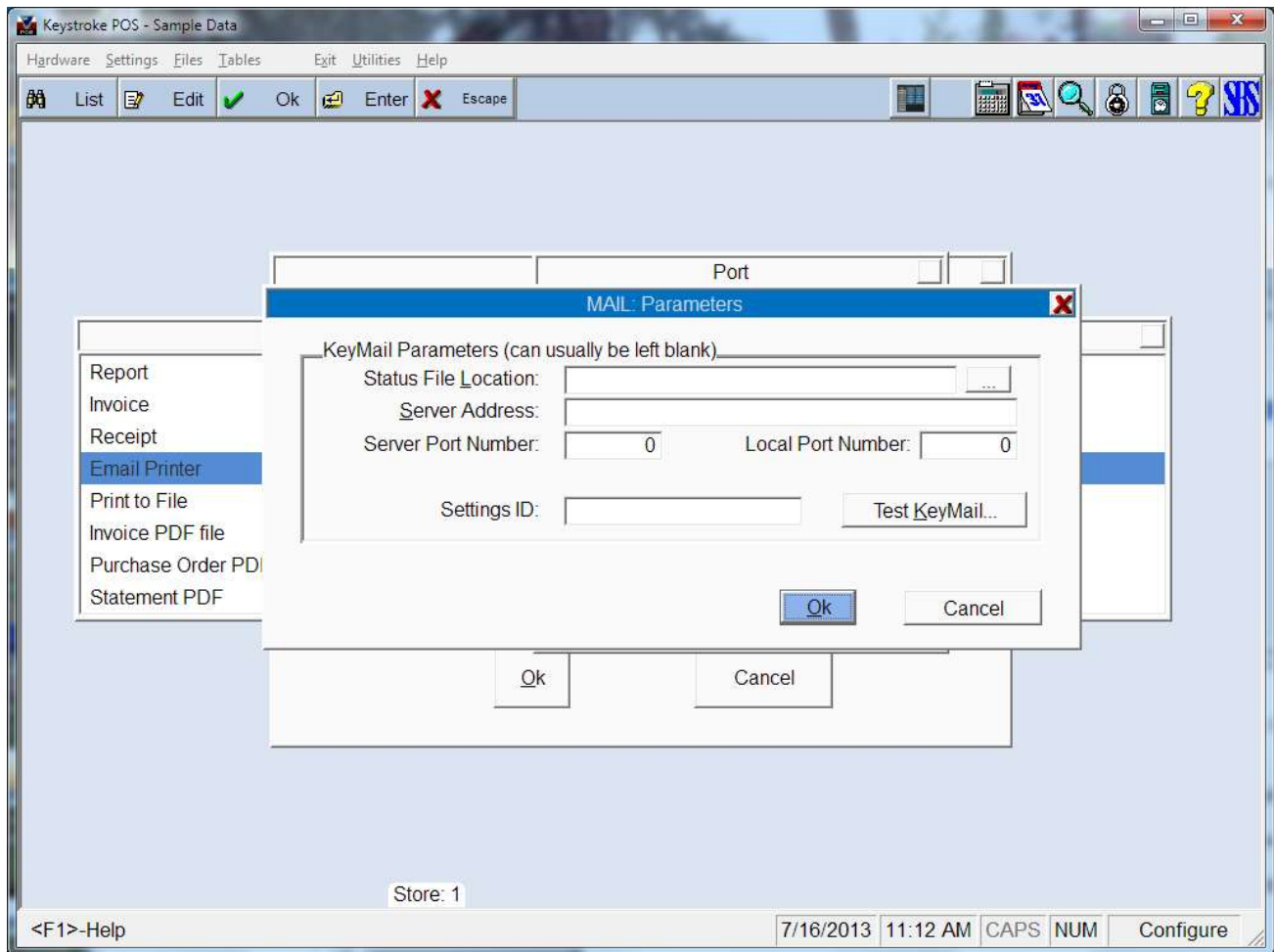
- 1) In Configuration Manager, under Hardware, Printers, add a new printer by hitting INS.
- 2) Name the printer “Invoice PDF File” (will be used for emailing Sales Invoices).
- 3) Set driver to WINPDF and set the Port to PDF and assign the filename “**Invoice&.pdf**”
Note: Use **Order&.pdf**, **Statement&.pdf**,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



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Add a printer in Keystroke to send the Email.

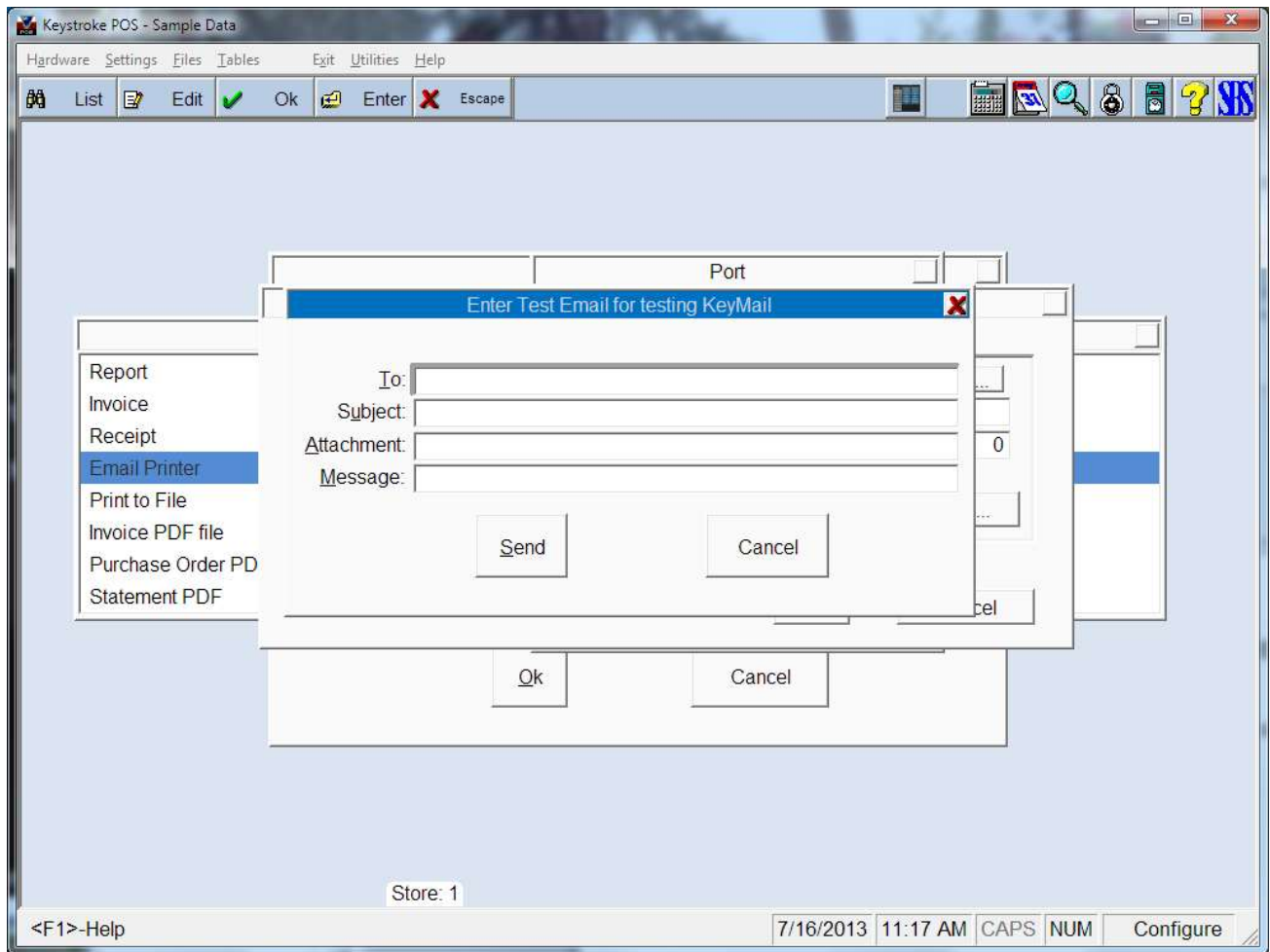
- 1) In Configuration Manager, under Hardware, Printers, add a new printer by hitting INS.
- 2) Name the printer Email Printer.
- 3) Set the driver to Windows and set the Port to Mail. The Mail: Parameters screen is displayed. In a typical installation, all of these parameters can all be left blank.



- 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”.

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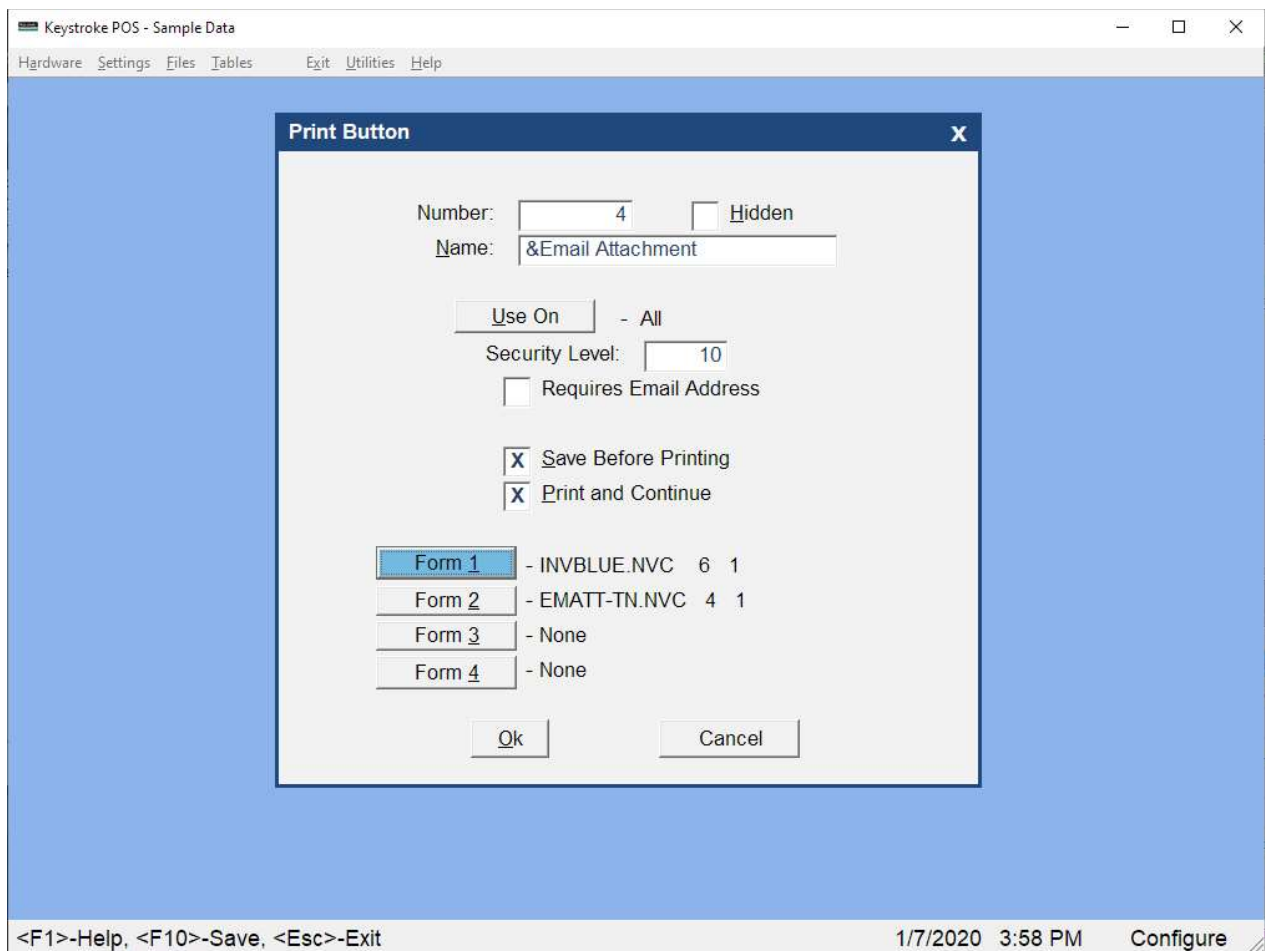
- 5) Enter an email address, subject, and message and select Send to verify that Keystroke can send an email through the KeyMail Service.



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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 similar).
- 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 EMATT-TN.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 |
| Email Body (Time Clock Receipts): | Lines 80, 81, 82, 83, 84, and 85 |

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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 is titled 'Sales Invoice' and contains a 'Customer Main Screen' overlay. The overlay has the following fields and values:

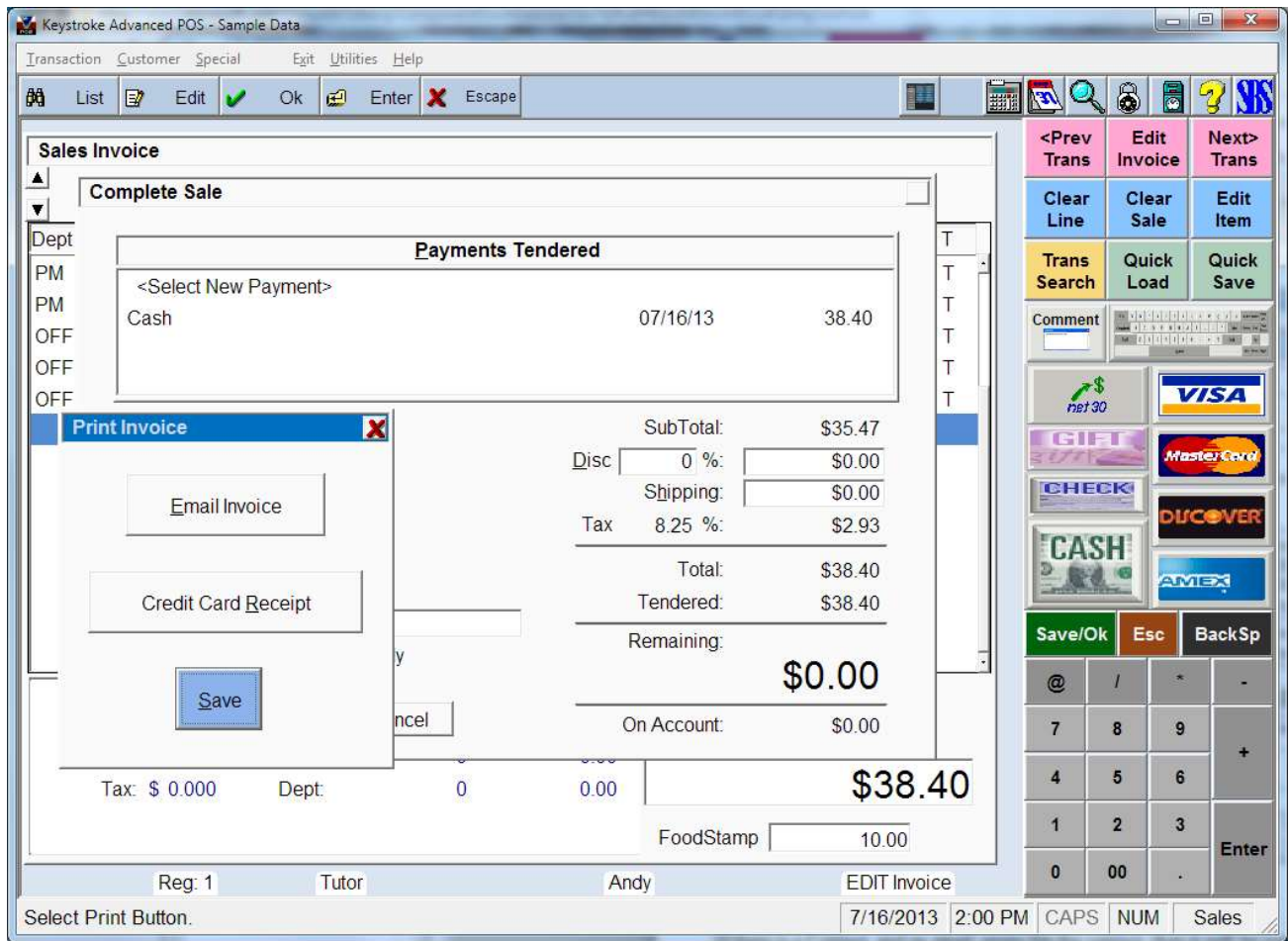
- Customer Code: SBS
- Number: 30
- First Name: (empty)
- Salut: (empty)
- Class: (empty)
- Last Name: (empty)
- Title: (empty)
- Business Name: Specialized Business Solutions
- Lookup Name: Specialized Business Solutions
- Billing Address: (empty)
- Alt: (empty)
- Country: (empty)
- Residential:
- Price 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
- Last Purchase: 07/16/13
- Last Payment: / /
- Last Edit: 07/16/13

At the bottom of the overlay, there are buttons for 'Contacts', 'AltCodes', 'More Data', and 'Custom'. The main window also shows a 'Trans' section with buttons for '<Prev Trans', 'Edit Invoice', 'Next> Trans', 'Clear Line', 'Clear Sale', 'Edit Item', 'Trans Search', 'Quick Load', and 'Quick Save'. A 'Comment' field is also present. The bottom status bar shows 'Reg: 1 Tutor Andy EDIT Invoice' and a date/time of '7/16/2013 1:59 PM' along with 'CAPS NUM Sales'.

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

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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.

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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: 587 or 465
- Gmail Secure SSL Required: Yes/On
- Gmail User Name: your full Gmail email address (e.g., myemail@gmail.com)
- Gmail Password: **See Page 14 for using the recommended App Passwords.**
NOTE: You may opt to turn ON “Less Secure App Access” in Google Settings (not recommended)
Google Security Settings: <https://myaccount.google.com/security>

Outlook / Windows Live Mail settings:

- Windows Live SMTP Server Address: smtp.live.com
- Windows Live Port: 587
- Windows Live Secure SSL Required: ON
- Windows Live User Name: your full Outlook/Windows Live email address (e.g., myemail@live.com)
- Windows Live Password: your Outlook/Windows Live password

MSN settings:

- MSN SMTP Server Address: smtp.live.com
- MSN Port: 587
- MSN Secure SSL Required: ON
- MSN User Name: your full MSN email address (e.g., myemail@msn.com)
- MSN Password: your MSN password

Yahoo! Mail settings:

- Yahoo! SMTP Server Address: smtp.mail.yahoo.com
- Yahoo! Port: 587
- Yahoo! Secure SSL Required: ON
- Yahoo! User Name: your full Yahoo! email address (e.g., myemail@yahoo.com)
- Yahoo! Password: You must use “Manage App Passwords” at Yahoo.com.

Select Settings, Account Security from: <https://login.yahoo.com/account/personalinfo>

Then select Other App and generate a code. Use this code as your KeyMail password and test.

Hotmail settings:

This now uses Outlook/Windows Live Mail. See above.

Troubleshooting KeyMail – Common Errors and Fixes

Below is an unsorted listing of possible errors and fixes:

Error #-1: The Operation has timed out.

Review the KMERR.LOG file in the program folder (i.e., C:\Keystrok).

Some Email providers have changed their Port and SSL Requirements over the years.

Try Port 587 with SSL checked.

Try Port 25 with SSL checked.

Error #5: System Security Authentication.AuthenticationException... The Operation has timed out.

Followed by other .NET information.

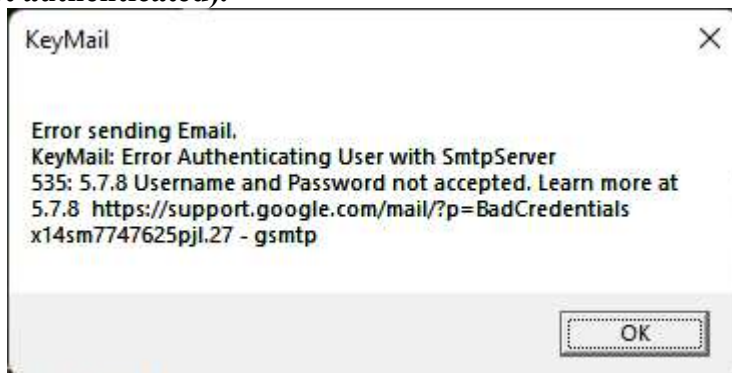
Uncheck SSL (turn off) and try other ports like 2525 which some providers use.

Contact your Internet Mail Provider for exact Port and SSL requirements.

Attachment not sent, but the Email is sent.

- Use the form EMATT-TN.NVC instead of EMATTACH.NVC if printing Invoices, Orders, and Quotes using the same Keystroke Email Printer.
- Review the KMERR.LOG file in the program folder (i.e., C:\Keystrok). This will give you information on the attachment that KeyMail is looking for. It is possible that the location is incorrect, or that the file is not found.

Error sending Email. KeyMail: Error Authenticating User with SmtServer 535: 5.7.8 Username and password not accepted. (Or Error #530 – The SMTP server requires a secure connection or the client was not authenticated).



- This is seen using Gmail. It is recommended to setup 2-Step Verification and App Passwords in Google. See Page 14 below.
- Optional: You can turn ON the Allow Less Secure Apps if not using 2-Step Verification (not recommended).

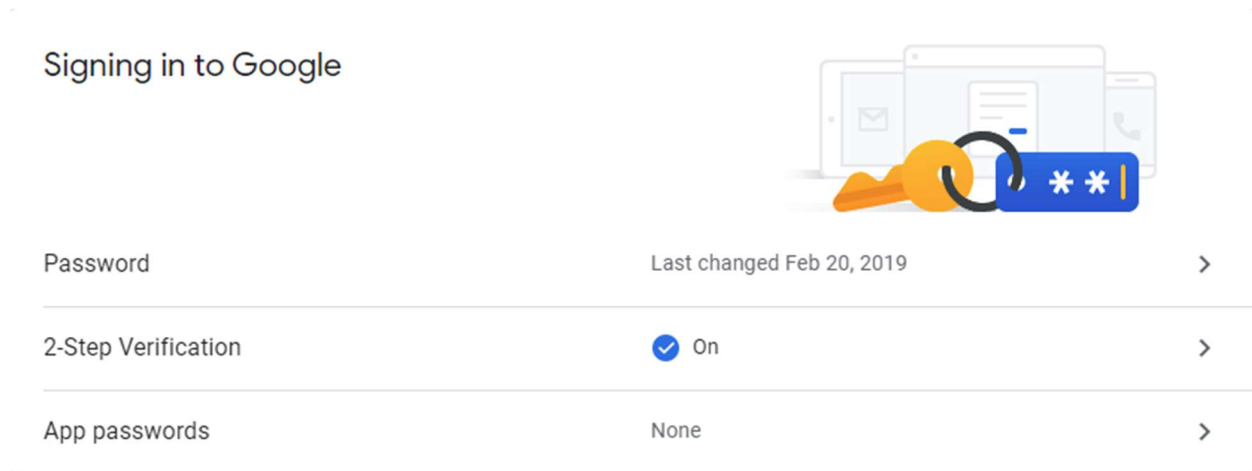
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Setting up Gmail with 2-Step Verification and using App Passwords

Go to your Google Account Security Settings: <https://myaccount.google.com/security>

Turn ON 2-Step Verification. Follow the prompts to verify the 2-Step Verification process.

- Once 2-Step Verification is complete, select App Passwords.



- Select Other (Custom name).

← 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](#)

You don't have any app passwords.

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

Select app	Select device ▼	GENERATE
Mail		
Calendar		
Contacts		
YouTube		
Other (Custom name)		

Specialized Business Solutions – Installing the KeyMail Service

- Type in a name (i.e., “KeyMail”) and select 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](#)

You don't have any app passwords.

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

KeyMail ×

GENERATE

- A password will be created just for this application. Copy/Paste it into your KeyMail Settings, using your same email address as before. Select Done in Google. Click the Test button in KeyMail Settings

← 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](#)

Generated app password

Your app password for your device

nevm hlaf [REDACTED]

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

Email:

Password:

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This process will then use a unique password for KeyMail. This keeps your existing Google Account Password safe. If you or Google identify invalid activity, you can shut down your Application Password instead of your entire account.

- You can delete your App Password if you have issues (click the trashcan):

← 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	
Keymail	8:58 AM	-	

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

Select app ▼ Select device ▼

[GENERATE](#)

Note: Less Secure Apps is automatically OFF and no longer available:

← Less secure app access

Some apps and devices use less secure sign-in technology, which makes your account vulnerable. You can turn off access for these apps, which we recommend, or turn it on if you want to use them despite the risks. Google will automatically turn this setting OFF if it's not being used. [Learn more](#)

This setting is not available for accounts with 2-Step Verification enabled. Such accounts require an application-specific password for less secure apps access. [Learn more](#)