

SETUP BACKGROUNDMAIL



SWEDEN
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SETUP INSTRUCTIONS

1. Install Pricka Bokslut on any server.

Edit the connection string in the PrickaBokslut.exe.config located in the application folder e.g. C:\Program Files (x86)\Pricka Bokslut\ and point out database and choose database login method.

```
<add name="PrickaBokslut.Properties.Settings.ConnectionString" connectionString="Data Source=myDatabase;Integrated Security=SSPI;Initial Catalog=PrickaBokslut" />
```

Example with username and password:

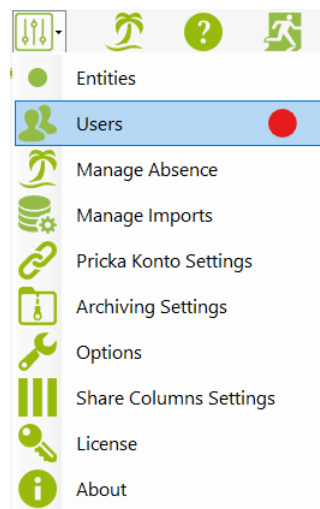
```
<add name="PrickaBokslut.Properties.Settings.ConnectionString" connectionString="Data Source=myDatabase; User Id=myUsername; Password=myPassword; Initial Catalog=PrickaBokslut" />
```

More information can be found via the following link:

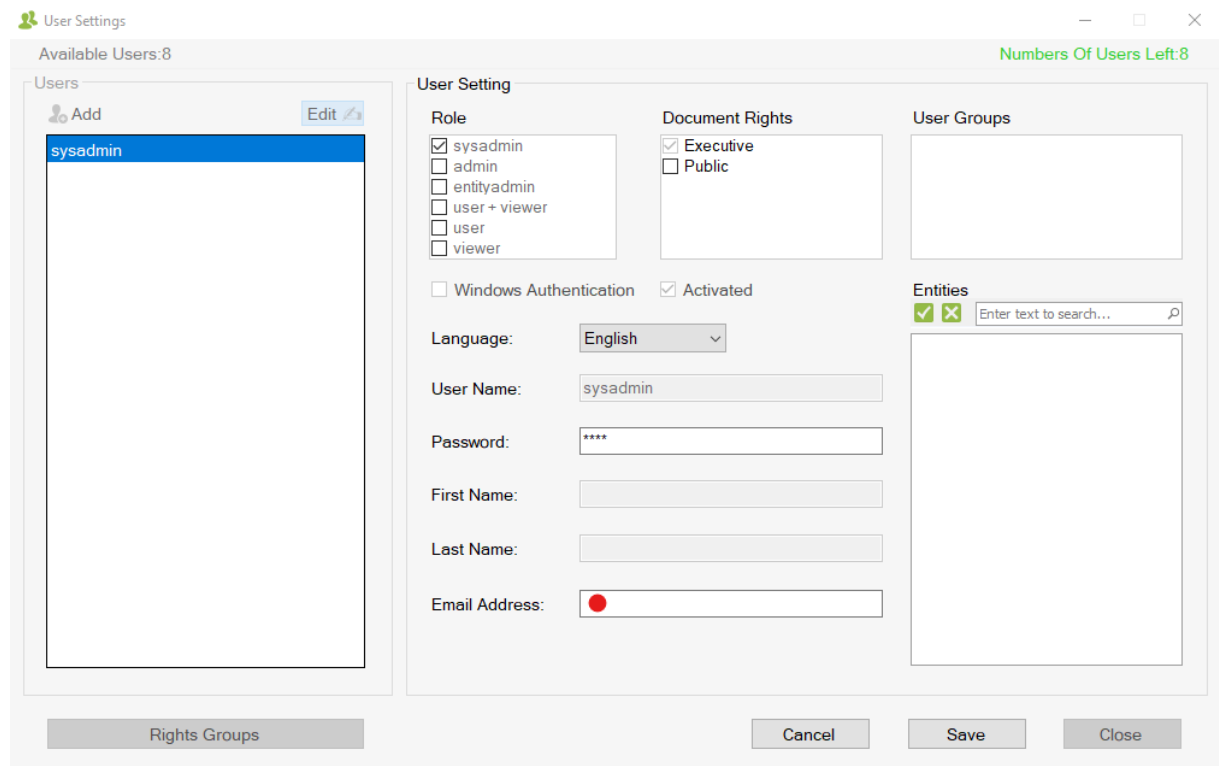
<http://www.connectionstrings.com/sql-server/>

2. Log in to the software as sysadmin or admin

3. Open Users



4. Make sure the user you are logged in with has an email address.

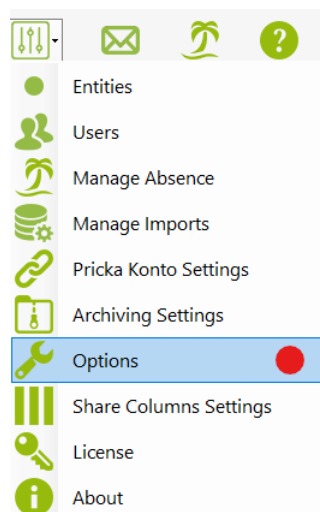


The 'User Settings' dialog box is shown with the 'sysadmin' user selected. The 'Available Users' list on the left contains 'sysadmin'. The 'User Setting' panel on the right shows the following configuration:

- Role:** ☒ sysadmin, ☐ admin, ☐ entityadmin, ☐ user + viewer, ☐ user, ☐ viewer
- Document Rights:** ☒ Executive, ☐ Public
- User Groups:** (Empty list)
- Entities:** ☒ ☒ Enter text to search... (Search icon)
- Authentication:** ☐ Windows Authentication, ☒ Activated
- Language:** English (dropdown)
- User Name:** sysadmin
- Password:** ****
- First Name:** (Empty field)
- Last Name:** (Empty field)
- Email Address:** (Field with a red error indicator)

Buttons at the bottom: Rights Groups, Cancel, Save, Close.

5. Open **Options**



6. Fill in according to the red dots:

The screenshot shows the 'Options' dialog box with the 'Email' tab selected. The 'General' tab is also visible. The 'Email' tab contains the following settings:

- Activate Pricka Bokslut Email:** Checked (indicated by a red dot).
- Email Type:** ☒ Send Email From Client (indicated by a red dot), ☐ Send Email From SQL Server.
- Email Options:** ☒ To Do List (indicated by a red dot), ☒ Reminder List (indicated by a red dot).
- Outgoing Email Server (SMTP):**
 - Email Address:** (empty field, indicated by a red dot).
 - User Name:** (empty field, indicated by a red dot).
 - Password:** (empty field, indicated by a red dot).
 - Server Name:** (empty field, indicated by a red dot).
 - Port:** 587 (indicated by a red dot).
 - ☒ Server Requires SSL (indicated by a red dot).
- Options Send Email In Background:**
 - Email Language:** English (indicated by a red dot).

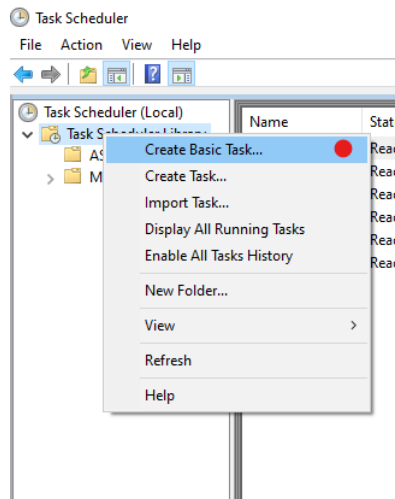
Buttons: Send Test Mail, Cancel, OK.

7. Press **Send Test Mail**. Check that the email arrived. If not check everything is set correctly and gates for sending mail are open in the firewall.

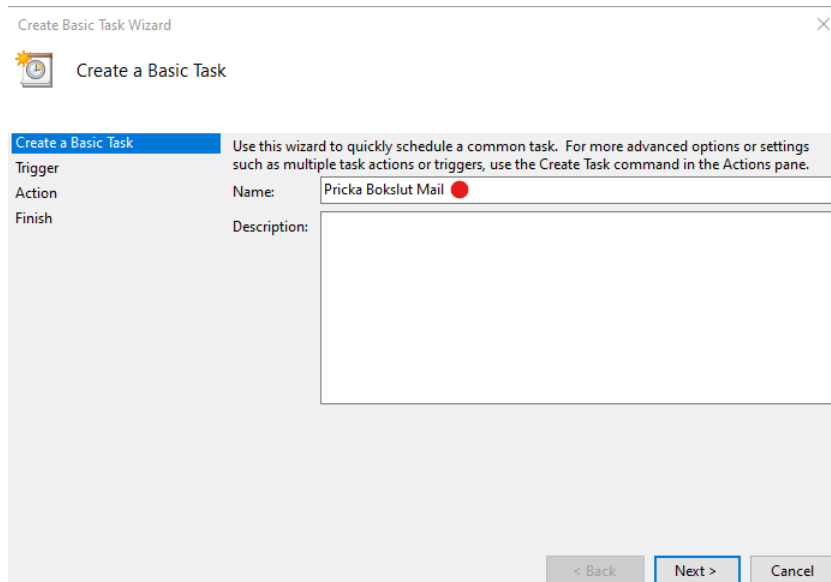
8. Press **OK** to save settings and close Pricka Bokslut.

9. Open Windows **Task Scheduler**

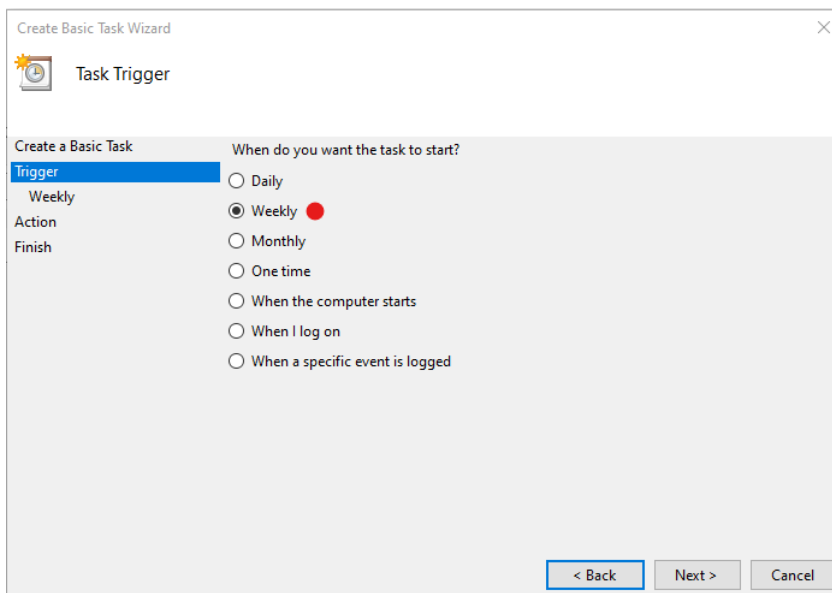
10. Right click on **Task Scheduler Library** – **Create basic Task...**



11. Enter name “Pricka Bokslut Mail” and press **Next**



12. Select **Weekly** and press **Next**



Create Basic Task Wizard

Task Trigger

Create a Basic Task

Trigger

Weekly

Action

Finish

When do you want the task to start?

☐ Daily

☒ Weekly

☐ Monthly

☐ One time

☐ When the computer starts

☐ When I log on

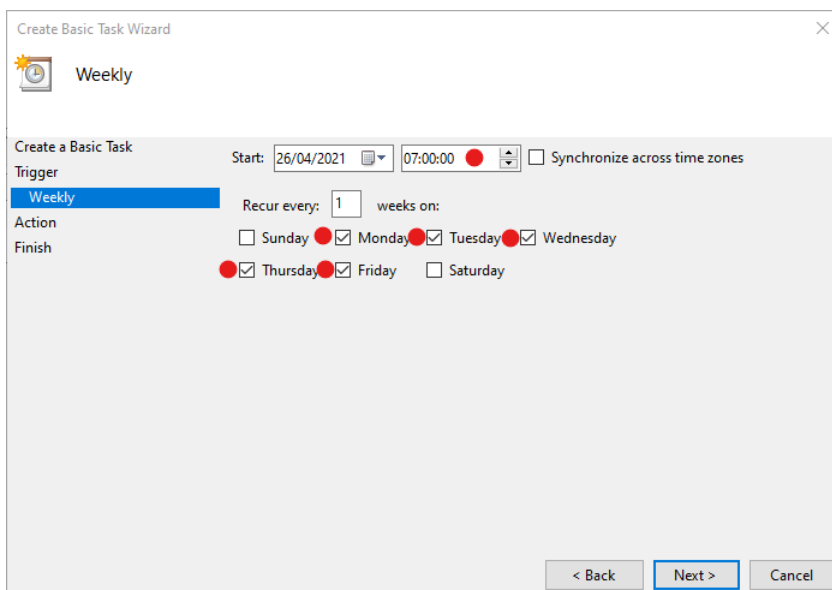
☐ When a specific event is logged

< Back

Next >

Cancel

13. Fill in according to the red dots and press **Next**



Create Basic Task Wizard

Weekly

Create a Basic Task

Trigger

Weekly

Action

Finish

Start: 26/04/2021 07:00:00

☐ Synchronize across time zones

Recur every: 1 weeks on:

☐ Sunday ☒ Monday ☒ Tuesday ☒ Wednesday

☒ Thursday ☒ Friday ☐ Saturday

< Back

Next >

Cancel

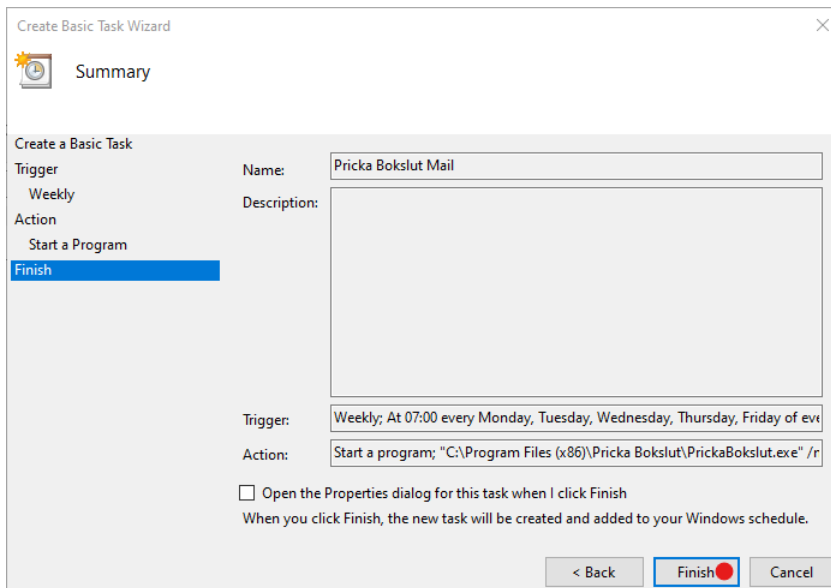
1. Select **Start a program** and press **Next**

The screenshot shows the 'Create Basic Task Wizard' window. The title bar says 'Create Basic Task Wizard'. The left sidebar has 'Trigger' (Weekly), 'Action', and 'Finish'. 'Action' is selected and highlighted in blue. The main area is titled 'What action do you want the task to perform?'. It contains three radio buttons: 'Start a program' (selected with a red dot), 'Send an e-mail (deprecated)', and 'Display a message (deprecated)'. At the bottom are three buttons: '< Back', 'Next >' (highlighted with a blue border), and 'Cancel'.

2. Press **Browse** and select **C:\Program Files (x86)\Pricka Bokslut\PrickaBokslut.exe** and add arguments **/m**. Then press **Next**.

The screenshot shows the 'Create Basic Task Wizard' window at the 'Start a Program' step. The left sidebar has 'Trigger' (Weekly), 'Action', and 'Finish'. 'Start a Program' is selected and highlighted in blue. The main area has three fields: 'Program/script:' with the text '"C:\Program Files (x86)\Pricka Bokslut\PrickaBokslut.exe"' and a 'Browse...' button; 'Add arguments (optional):' with the text '/m'; and 'Start in (optional):' which is empty. At the bottom are three buttons: '< Back', 'Next >' (highlighted with a blue border), and 'Cancel'.

3. Press Finish



If you want to test that the e-mail is sent to users, you can right-click on the task and press **Run**.
NOTE! In order for e-mails to be sent, there must be reconciliations and tasks to be performed.

