

SedonaEmail Implementation Process

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Purpose

This document is an overview of the implementation process for SedonaOffice.

The SedonaEmail module is used to send email communications from within SedonaOffice. It is included in the SedonaOffice product. One use for the product is sending invoices via email, however, SedonaEmail puts the invoice in the body of the email vs an attachment to the email.

For some recipients, the invoice must be an attachment. SedonaEmail cannot be used for this purpose. For customers that require this, SedonaSync should be used instead.

Note: Although SedonaEmail is include with the product, when the customer sends emails via SedonaEmail, Bold does incur costs via the Mandrill usage.

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Implementation Steps

Follow the steps below to implement SedonaEmail:

1. Prerequisite information

a. Refer customer to Knowledge Owl document Configuring your System for:

i. [SedonaEmail User Guide](#)

ii. [SedonaEmail](#)

iii. [Configuring your System for SedonaEmail](#)

i. Customer will need to supply the information under the 'Setting the Preferences for Email' section:

i. From Email Address

ii. From Name

- iii. Reply To Email
- iv. Default Email Subject
- v. Email Body Message

ii. Ensure customer reviews the sections:

- i. Validating the Email Domain Name to prep for the install
- ii. Changes to your DNS server - ensure they have made the changes

2. Schedule the installation with a System Technician

a. Duration 15 minutes

- i. System Tech will send a verification to the customer to return to the System Tech
- ii. System Tech will test the customer settings and inform customer of any changes required.
- iii. System Tech will then turn on SedonaEmail in SedonaOffice

3. Customer can now test emails

4. Schedule Training (if purchased)

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