

Email Integration

SYSPRO 8

Reference Guide

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Email Integration

Exploring

Where it fits in?

Because email generation is a core part of the SYSPRO ERP solution, we've implemented a modern, integrated emailing solution that integrates seamlessly with **Microsoft Office 365**. This ensures efficient communication with customers and suppliers, while also supporting multi-tenant Office 365 environments.

Benefits

- Continued use and integration with **Microsoft Office**
- Support for multi-tenanted office instances

Navigation

The programs related to this feature are accessed from the **Program List** of the SYSPRO menu:

- *Program List > Administration*

Terminology

Email Profile

An email profile is a configuration setup within an email service or application that specifies the settings and credentials required to send and receive emails. It includes details such as the email provider, authentication credentials, and specific functions or actions that the profile applies to.

In SYSPRO, an email profile can be created using the **Emailing Profiles¹** program and can be configured to use different email providers like SMTP or Microsoft Office 365.

¹Program: IMPEPR

Starting

Prerequisites

To use this feature, these components must be installed using the **SYSPRO Installer Application**:

- SYSPRO 8 e.NET Communications Load Balancer
- SYSPRO 8 Service Upgrade Manager
- SYSPRO Application Gateway Service
- SYSPRO Email Service



- The services require the **Microsoft .NET Framework 4.8** runtime.
- The endpoint of the **SYSPRO Application Gateway Service** must be configured using the **Setup Options¹** program (*Setup Options > System Setup > Connectivity*).
- The SYSPRO Email Service is configured by creating one or more email profiles using the **Emailing Profiles²** program.

To use this feature, the following setup option(s) must be enabled/defined:

Setup Options > System Setup > Connectivity

- Setup emailing



- The **SYSPRO Email Service** must be running to launch the **Emailing Profiles³** program.
- The **SETUP EMAILING** hyperlink launches the **Emailing Profiles⁴** program, which is now the exclusive location for configuring the modernized emailing functionality. All previous configuration points have been deprecated and are no longer accessible.

¹Program: IMPCFG

²Program: IMPEPR

³Program: IMPEPR

⁴Program: IMPEPR

Security

You can secure this feature by implementing a range of controls against the affected programs. Although not all these controls are applicable to each feature, they include the following:

- You restrict operator access to *activities* within a program using the **Operator Maintenance** program.
- You can restrict operator access to the *fields* within a program (configured using the **Operator Maintenance** program).
- You can restrict operator access to *functions* within a program using passwords (configured using the **Password Definition** program). When defined, the password must be entered before you can access the function.
- You can restrict access to the eSignature *transactions* within a program at operator, group, role or company level (configured using the **Electronic Signature Configuration Setup** program). Electronic Signatures provide security access, transaction logging and event triggering that gives you greater control over your system changes.
- You can restrict operator access to *programs* by assigning them to groups and applying access control against the group (configured using the **Operator Groups** program).
- You can restrict operator access to *programs* by assigning them to roles and applying access control against the role (configured using the **Role Management** program).

Restrictions and Limits

- The **SYSPRO Email Service** must be running to launch the **Emailing Profiles**¹ program.
- Interactive providers (that require user interaction) can only be configured for the user interface, i.e. if you have selected **Microsoft Graph Delegate Sender** at the **Provider** field, you can only select the **User Interface** function.

¹Program: IMPEPR

Solving

FAQs

How do I set up email integration?

You have to create and configure email profiles, either system-wide or per company.

Select the **SETUP EMAILING** hyperlink in the **Setup Options¹** program (*Setup Options > System Setup > Connectivity*).

The **SETUP EMAILING** hyperlink launches the **Emailing Profiles²** program, which is now the exclusive location for configuring the modernized emailing functionality. All previous configuration points have been deprecated and are no longer accessible.

How do I configure an email profile?

Follow these steps to create an email profile:

1. After updating to **SYSPRO 8 2025**:

Install the **SYSPRO Email Service** using the **SYSPRO Installer Application** and ensure that the service is configured correctly and running.

2. Launch **SYSPRO 8 2025** and navigate to the *Setup Options > System Setup > Connector Gateway* form within the **Setup Options³** program.
3. Select the **SETUP EMAILING** hyperlink against the **Email setup** field.

The **Emailing Profiles⁴** program is displayed.

- a. Within the **Profile** pane, proceed as follows:

- i. At the **Profile** toolbar field, enter the name of the new profile and press **TAB**.



The toolbar buttons, windows and listview are then enabled.

- ii. Enter the profile's description within the **Description** field.
- iii. Use the **Select provider** hyperlink to select the required provider.



The **Profile settings** section will be updated to display the fields associated with the selected provider.

¹Program: IMPCFG

²Program: IMPEPR

³Program: IMPCFG

⁴Program: IMPEPR

- iv. Within the **Apply to** field, indicate whether the profile should be applied system-wide or per company.



If you select **Company**, the **Select companies** field will be enabled, from where you can indicate the companies to which the configured profile applies.

- v. Check the **Enabled** field to activate the email profile.

- b. In the **Functions** listview:

- i. Select all the functions that require the current profile configuration.

4. Within the **Profile settings** pane:

- a. Complete all the relevant fields that are displayed once you have selected the provider:

- SMTP Host name
- Outgoing email address
- User name
- Password
- Port
- SSL



Ensure to double check sensitive fields as you can't view these again after saving.

- b. If applicable, configure your delegate sender emailing by entering the following details:

- Tenant ID
- Client ID
- Redirect URL

5. Save the email profile configuration.

The profile configuration is then immediately available to the **SYSPRO Email Service**.

Which default providers are included with SYSPRO?

You can either use an SMTP provider or the Microsoft Office 365 Emailing Provider (using Microsoft Graph API).

Can I use different email accounts to send documents and reports?

When setting up the email profile using the **Emailing Profiles¹** program, you can select the **functions** linked to each email profile. These functions correspond with the business activities that require the email profile to send emails.



You can specify which email account should be used for different operations or business activities by setting up appropriate email profiles.

You can select one of the following functions when creating an email profile:

- **Default**

This option serves as the default or standard profile standard profile and will be used when no specific profile is defined for an email function.

- **System Administration**

This option applies to all system administration-related email functions, such as password recovery (forgot, reset, retry), multi-factor authentication (MFA), OData authentication, and similar administrative operations.

- **User Interface**

This option covers all email functions initiated through the user interface, such as context menus and hyperlinks. Examples include emailing exports from grids or charts, sending configuration files (e.g., roles, settings, log files), and using email-enabled hyperlinks.

- **Electronic Signatures**

This option includes all email functions triggered as part of an electronic signature process.

- **All Reports**

This option covers all email functions associated with report generation and review programs.

- **Document Flow Manager**

This option covers all email functions associated with the Document Flow Manager.

- **All Documents**

This option serves as a default or standard profile that is used for all documents, e.g. statements, quotes, invoices, etc.

- **Documents Remittance**

This option covers all document email functions associated with Accounts Payable remittance, such as AP check, EFT, and cashbook remittance.

¹Program: IMPEPR

■ Documents Accounts Receivables

This option covers all document email functions associated with Accounts Receivable statement print, AR dunning letters, discount notes, permanent entries, and AR invoices.

■ Document Quotations

This option covers all document email functions associated with Quotations (multiple columns, multiple lines, and single).

■ Document Inventory Movements

This option covers all document email functions associated with issues, purchase order receipts, stock receipts, transfers out, and RMA issues.

■ Document Purchasing

This option covers all document email functions associated with blanket contracts, and purchase orders (foreign and local).

■ Document Quality

This option covers all document email functions associated with purchase order inspections, and include PO rejections, PO scrap, factory documentation, WIP inspection, and WIP scrap.

What do I need to set up Microsoft Office 365 emailing?

You need the following:

- A Microsoft Graph Delegate Sender Provider (for UI emailing)
- A Microsoft Graph Direct Sender Provider (for application level emailing)



You have to complete an application registration on the Microsoft Azure portal to use these providers.

The process outlined below may be updated or changed by Microsoft in the future.

The following things are important to remember when setting up the application registration:

■ Redirect URL

SYSPRO supports two platform types for **Delegate** email provider:

▫ Public client/native

Use this for the **SYSPRO Desktop** version. The redirect should be **https://localhost**.

▫ Single Page Application (SPA)

Use this for the **SYSPRO Web UI (Avanti)** version. The URL entered here must be the URL the users would use to access the WebUI page (HTTPS required).

■ Type Of Permissions

■ Permissions Required

Select **Delegated Permissions** for the **Delegate** email provider. The following permissions are required:

- Contacts.Read *
- Mail.ReadWrite
- Mail.Send
- User.Read
- User.ReadBasic.All

Select **Application Permissions** for the **Direct Sender** email provider. The following permissions are required:

- Mail.Send
- User.Read.All *
- Group.Read.All *
- OrgContact.Read.All *
- Address Book lookup



- When using **Delegated** permissions, the first authentication attempt must be approved(consented) by the systems administrator.
- When using **Application** permission, the system administrator has to grant consent while setting up the permissions.

Once this is set up, the following keys (obtainable from the **Overview** screen on the **Azure App** registration) must be saved against the email profile using the **Emailing Profiles¹** program:

- Application (client) ID
- Directory (tenant) ID
- Redirect URL (for the delegated provider only)

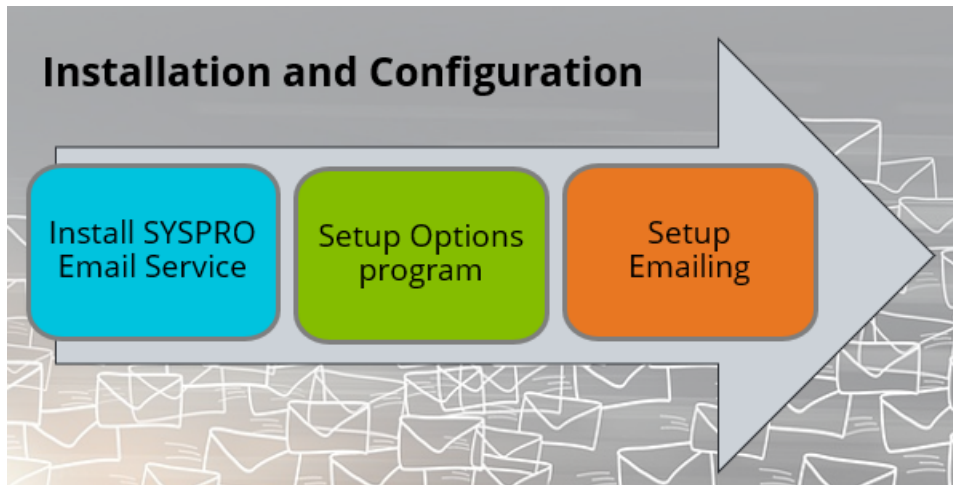
Additionally, the **Direct Sender Provider** requires a valid **From Email Address** setting to be saved against the email profile.

¹Program: IMPEPR

Using

Process

Installation and Configuration



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- b. If applicable, configure your delegate sender emailing by entering the following details:

- Tenant ID
- Client ID
- Redirect URL

5. Save the email profile configuration.

The profile configuration is then immediately available to the **SYSPRO Email Service**.

Affected programs

The following indicates areas in the product that may be affected by implementing this feature:

Setup programs

Emailing Profiles

Accessible from the **SETUP EMAILING** hyperlink in the **Setup Options¹** program (Setup Options > System Setup > Connectivity).

This program lets you set up and configure the email profiles.

Document Flow Manager Setup

Program List > Administration > Document Flow Manager

This program lets you add, configure and delete contracts for the **Document Flow Manager**.

For the **Email Integration** enhancement, we made the following changes:

- You can access the **Emailing Profiles²** program by selecting **SMTP Options Setup** from the **View** menu.
- The **Document Flow Manager** function can be selected for an email profile (within the **Emailing Profiles³** program) to cover all email functions associated with the Document Flow Manager.

¹Program: IMPCFG

²Program: IMPEPR

³Program: IMPEPR



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