Setting up e-mail service for RBA 1

Configure Administrator so that RBA can send e-mail messages using your mail server.

Requirements

- If you have InSite, you must first configure IIS and any firewall that may exist on your system.
- You must know the following information about the mail server that sends e-mail messages for your company:
  - The mail server's name or IP address
  - The mail server's SMTP port
  - What type of authentication it uses
- If the server that is sending e-mail has McAfee VirusScan software, configure the VirusScan software to allow `AutomationApp.exe` to use port 25 to send outbound e-mail. For instructions, see the McAfee documentation.

1. On the Prinergy primary server, in Administrator, select **Tools** > **Configure RBA**.
2. In the **Email Server** box, type the name or IP address of the mail server.
3. If the mail server uses a port other than 25 for SMTP communication, type the port number in the **Email Server Port** box.
4. In the **Login** area, enter authentication settings:
   - If the mail server allows anonymous connections, leave the **Authentication** list set to **Anonymous**.
   - If the mail server requires basic authentication, in the **Authentication** list, select **Basic (clear text)**, and complete the **Login** area to identify the name and password of the authenticated user account that RBA will use to send e-mail messages. Keep in mind that basic authentication stores the user name and password in the e-mail message as clear text, allowing hackers to detect the user name and password as the message travels over the Internet.
   - If the mail server requires Integrated Windows Authentication, in the **Authentication** list, select **NTLM**. (NTLM stands for Windows NT LAN Manager, the Microsoft Windows NT operating system Challenge/Response authentication protocol.)
5. If you want RBA e-mail messages to be sent from a specific e-mail address, rather than the default address automation@prinergy.com, type the address in the **'From' Parameter Default** box.
6. Send a test message with RBA to make sure e-mail is set up correctly:
   a. Click **Test**.
   b. Enter your e-mail address.
   c. Click **Send Test E-mail**, click **Close**, and click **OK**.
   d. Check your e-mail messages to make sure that you received the message from RBA.
      Note: Even if you receive the test message, RBA e-mail is not set up until you perform the next step.
7. Restart the Rule Engine daemon:
   a. Open Windows Task Manager.
   b. Click the **Processes** tab.
   c. Click the **Image Name** column label to sort items alphabetically by name.
   d. Right-click `WebServerApp.exe`, and select **End Process**. Click **Yes** to confirm.
   e. Right-click `AutomationApp.exe`, and select **End Process**. Click **Yes** to confirm.
      In 30 seconds, the RBA engine restarts automatically.

8. Test the e-mail setup with an actual rule set.
    For example, create a rule set in which the **Manual Trigger** event starts the **Email** action that sends you a message.

If you changed the default e-mail address for RBA, the new address takes effect on each client computer only after the Workshop is restarted. All other changes take effect immediately.