Emails

Guide on how to trigger each email.

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AccessLink

How to trigger:

- Your user must have the Access Links user permission.
- Go to Admin Panel > Users and Groups > Users page
- Hover over the user row you want to grant an Access Link for

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- Click the Create Access Link icon
- You'll be brought to the Create Instant Sign-In Link page where you can customize the access link settings.
- Once finished customizing, click Send.

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Share

How to trigger:

- Your user must have the Sharing user permission.
- From the Home page, get to the node view (expand an account, a cabinet, and a drawer)
- Right click on a node, and select Share

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- The Share dialogue will open
- Ensure the Email tab is active
- Select who you will share the node with
- You can customize the email to be sent and add additional permissions if desired
- When finished, click Share

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EmailFiles

How to trigger:

- Your account must have the Email Files account feature
- Your user must have the Sharing user permission
- Open the left menu and click on Admin

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- In the Admin panel, click on Settings

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- Scroll to the Email Files section, and check the Allow Email of Files checkbox

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- From the Home page, get to the node view (expand an account, a cabinet, and a drawer)
- Right click on a node, and select Email

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- This will open the Email Dialogue

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- Select who the email will be sent to and customize the Subject and Content
- Click send

EmailImportFailure

How to trigger:

- Account must have the Email Import account feature
- You'll need to set up an email import using an app password
- Once the setting is complete, change the app password in your email and this should trigger the failure

EmailImportMaxFailure

How to trigger:

- Allow your Email Import to fail for 4 days in a row.

MfaAuthCode

How to trigger:

- Open the left menu and click on My Settings

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- Under the Two Factor Authentication section, select the Enable Two Factor Authentication checkbox

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- Select the Email Token option
- Save your changes
- Log out
- Enter your username and password and attempt to log in again. This will trigger the email to be sent with the code.

MfaQrCode

How to trigger:

- Open the left menu and click on My Settings

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- Under the Two Factor Authentication section, select the Enable Two Factor Authentication checkbox

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- Select the Mobile Authenticator App option
- Save your changes
- Log out
- Enter your username and password and attempt to log in again. This will trigger the email to be sent with the QR code.

NewDocumentRequest

How to trigger:

- Your account must have the Document Requests account feature
- Your user must have the Document Requests user permission
- Open the left menu, hover over Document Requests, and select New Request

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- Fill out the information on the New Request page

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- Click Send Request

NewUser

How to trigger:

- You must have the User Management user permission
- Open the left menu and click on Admin

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- Click Users and Groups

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- From the Users page, click the Add User link

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- Fill in the new user information and click Create

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PasswordReset

How to trigger:

- From the login page, click the Forgot Password? link.

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- Enter your email address/username and click Send Reset Link

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SmtpEmailSettingFailure

How to trigger:

The only way I've been able to trigger this consistently is to

- Turn off Azure Storage Emulator
- And then follow the steps for sending an Email file

SmtpEmailSettingMaxFailure

How to trigger:

Status

How to trigger:

- I'm not sure of all the actions that trigger a Status email, but I know if you complete a Document Request, it will trigger this email.

TestEmail

How to trigger:

- Open the left menu and click on My Settings

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- Under the Email Settings section, click Add Email Setting

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- Select your email provider
- Once your new email setting has been established, a test email will be sent.