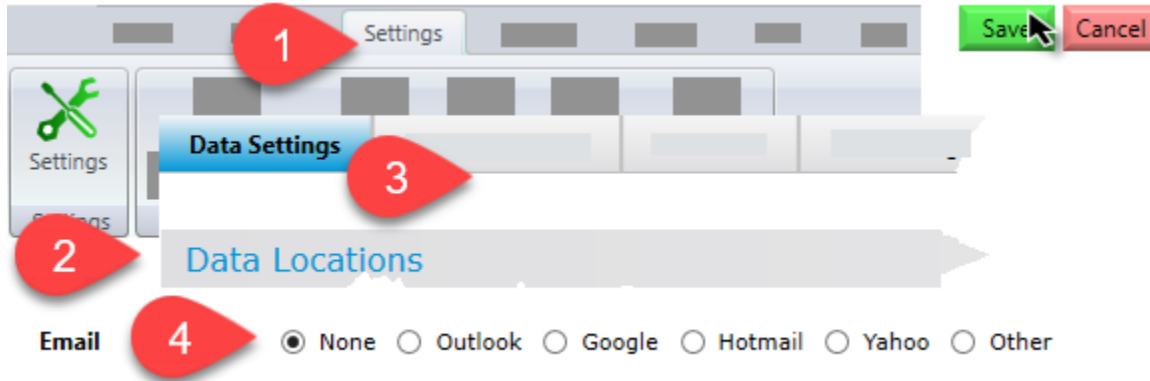


Reports

Why are my email options for billing and reports etc. unavailable?

By default, email is not set up, as Panoramix does not know about your email client until you tell Panoramix about it. To set up and enable email do the following.



1. Click the **Setting** Tab
2. If necessary, click the SETTINGS icon on the ribbon
3. Click the **Data Settings** tab
4. Select your email client
5. Click **save**

Panoramix directly supports MS® Outlook™, Gmail (Google) Hotmail™ and Yahoo® mail. You may also establish another client, such as integration with RedTail™, with a bit more information.

Outlook specific

Panoramix can pull in your Outlook calendar information as well. Simply check the *Use Calendars* check box.

A screenshot of the 'Outlook Information' section in the Panoramix Settings. It contains two main areas. On the left, under 'Use calendars:', there is a checked checkbox and a text box containing '\Calendar'. On the right, under 'Use shared calendars:', there is a table with a header row containing 'User Name' and a body row with a plus sign icon in the first column.

Google specific

Google lets you pull in your contacts and US Holidays as desired in addition to using Gmail.

NOTE: This is **not a password used to login to Google**. You must first create a separate "App password" in Google Account settings, for use by Panoramix, and enter it as the password here.

Google Information

User Name Password

Use calendars: ☒ @gmail.com
☒
☒ Contacts
☒ Holidays in United States

If you have a Business Google Account (G Suite) the administrator for that Google account will need to access the account settings at Google and configure the account for POP/IMAP mail access for every account client who needs to use Panoramix to generate e-mail. Google provides support instructions for this procedure at: <https://support.google.com/a/answer/105694?hl=en>.

Hotmail and Yahoo specific

Hotmail and Yahoo require your email address and password. Panoramix also allows you to customize your signature plate when using these clients—something available natively in other tools such as Outlook and Gmail.

Email Settings

Email Address Password

Email Signature

B *I* U ~~S~~ ~~D~~ **A⁺** **A⁺**

Font Font Size Font Color Highlight Color

☐ Insert signature automatically

Other specific

At a minimum, to send email, you will need to gather your service providers SMTP information. This is often available on your provider's web site.

If your provider does not offer the functionality of adding a signature line automatically, Panoramix provides that capability.

Email Settings

☐ POP3	Server		Port	110	User Name		Password		☐ SSL
☐ IMAP	Server		Port	110	User Name		Password		☐ SSL
☐ SMTP	Server		Port	25	User Name		Password		☐ SSL

Email Signature

B *I* U ~~S~~ ~~D~~       **A⁺** **A⁻**

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