Smile Dispatch Troubleshooting

Quick Reference Guide
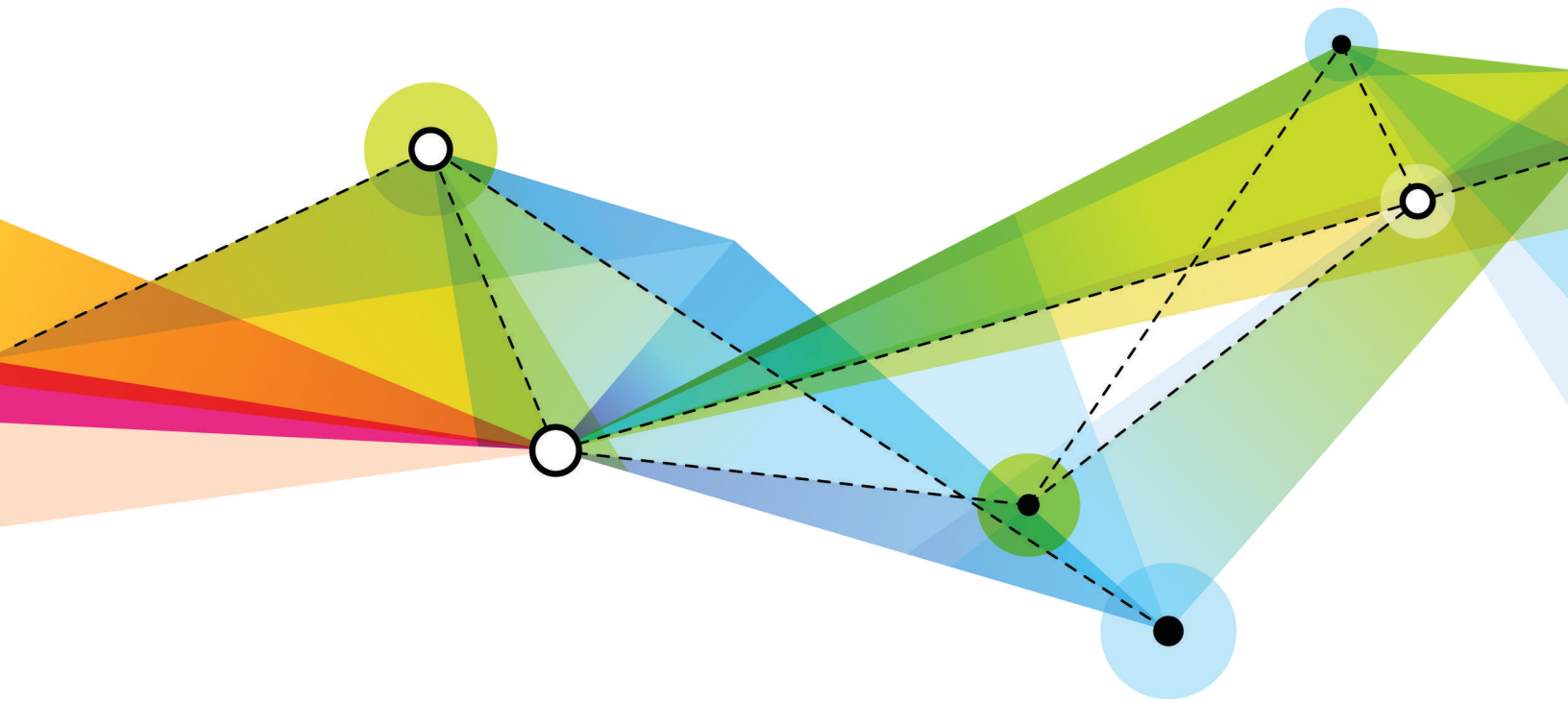
Smile dispatch troubleshooting

Amongst other things email is often used for delivering invoices. However, email is not a guaranteed delivery channel. Whilst it generally works for most of us, emails can fail or be blocked due to a variety of causes, such as network failures, black listing, incorrectly entered addresses, spam filtering, exceeded mailbox capacities or lack of server availability. Some obstacles are beyond the control of the sender, but you can still take steps to ensure your emails have the best chance of delivery.

Generally email works well. However, you may discover on occasion that your customers report that they fail to receive an email sent by Smile. This document provides some suggestions so you can confirm your email dispatches are being created and sent at your end of the delivery system.

Note: Hosted Smile Pro customers' outgoing emails are relayed via Inomial mail servers by default, unless configured otherwise. Therefore some issues such as server blacklisting will be managed by Inomial.

Document dispatch

Most email dispatches, including all invoice dispatches, are logged in Smile on the customer account. Check a customer's dispatch list first to ensure the email has been sent before looking further. If there is an entry in the dispatch list then the email has been sent by Smile.

View recent dispatches

Viewing recent dispatches lets you view account and subscription-specific documents that Smile has recently sent to a customer. For example, usage alerts, invoices, receipts and credit control documents.

This task explains how to view recent dispatches.

1. Search for the account or subscription for which you want to view recent dispatches, then double-click the entry in the search results.

   The account or subscription's summary page is displayed.
2. On the Account Menu Tree, click the ▶ to the left of **Account**, then click **Document Dispatch**.

   The Document Dispatch page is displayed. Smile displays any recent dispatches in the **Recent Dispatch** table.

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BCC all outgoing email

Smile provides the ability to specify that all outgoing emails are blind carbon-copied (BCC) to an archive mailbox. The presence of an email in the archive indicates the email was sent by Smile.

⚠️ **CAUTION:** As all outgoing Smile email will be stored in this email archive ensure you have sufficient mailbox capacity or a process in place to ensure the mailbox does not exceed capacity and refuse mail receipt.

Configure an outgoing email archive

This task explains how to configure an outgoing email archive.

1. On the **Smile** menu, click **Configuration**.

   The Configuration and Tools page is displayed.
2. Select **Company Preferences** in the **Accounts Receivable** section.

   The Company details page is displayed.
3. Enter an email address in the **BCC outgoing mail to** field. Click **Save**.

   The Configuration and Tools page is displayed.

Sender Policy Framework

A Sender Policy Framework (SPF) record is a type of Domain Name Service (DNS) record that provides a mechanism to allow receiving mail exchangers to identify which mail servers are permitted to send email on your behalf of your domain. The purpose of an SPF record is to prevent spammers from sending emails with forged From addresses on your domain.

Domains which publish SPF records are less likely to be targeted by spammers and phishers using forged From email addresses and therefore less likely to blacklisted by spam filters. Inomial recommends the use of an SPF record to ensure outgoing Smile dispatches are not caught in spam filters on the recipient end.

You will need your own network administrator to create and add appropriate mail server host addresses to your SPF record. Other potential areas that your network administrator could confirm are set up and configured correctly are DomainKeys Identified Mail (DKIM), Sender-ID and Domain Keys.

Smile Pro customers

Smile Pro hosted customers that use Inomial servers to relay their email will need to add Inomial into their SPF record if they have one set.

If Smile is configured to send emails as `@company.com` and company.com has an SPF record set, add `'include:_spf.inomial.com'` to the SPF record to authorise Inomial's address space to send email addressed from their domain.

Note: SPF records are usually cached. The Time to Live (TTL) parameter determines the lead time you should allow for SPF changes to be effective.

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Spam filters

If you have confirmed that your emails are being created and sent by Smile, but they are not being delivered they may be stopped by spam filters on the recipient end. Whilst you can not control the rules an external spam filter may be enforcing, you can ensure the content of your emails appear the least suspicious or phishy as possible.

Attachments

Particularly large attachments may be blocked by a filter. Or if an attachment passes through a filter it may then be too large for the recipients mailbox. If you have a requirement to regularly send very large files an alternate service to provide access to these files may be more suitable.

Images

Emails that contain only images or a high ratio of images to text may be flagged by a spam filter. Maintaining a good balance of text to graphics will improve the chance that an email is passed successfully.

HTML content

Poorly written or overly complex HTML can identify an email as spam. Emails that contain clear and readable formatting without excessive characters in the layout or excessive inline markup tags will have a greater chance of being read and passed by a spam filter.

Spam trigger words and phishing phrases

Words and phrases that could be blocked vary between filters, but generally spam filters are on the look out for words and phrases that commonly occur in commercial advertisements and promotions or phishing emails attempting to collect personal information. Individual words will generally not trigger a block. The filter will be looking for a high count of these words or phrases in a single email, so avoid or use these words sparingly.

Spam checkers

Downloadable or online spam checker applications provide a method of testing your email content. These tools will analyse your email and report on its deliverability, highlighting any issues that may cause your email to be blocked.

Server blacklists

Use a free online service to check if your email server has been blacklisted. If you discover that your server has been blacklisted you can then take steps to find out why and correct the listing.[#]

[#] Not relevant for Smile Pro hosted customers when outgoing emails are relayed by Inomial mail servers.

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Search

The global **Search** field lets you search for accounts, subscriptions, invoices and receipts, and lets you locate customer information in Smile.

The following table lists the terms you can use in the **Search** field.

Table 1: Search terms for each search type

Search type	Search term
Account	• Contact name • Phone numbers • Address details • USN (unique subscription number)
Subscription	• Username • Past usernames • USN
Invoice	Invoice number
Receipt	Receipt number

A USN, or unique subscription number, uniquely identifies each account and subscription in your company.

This task explains how to search for an account, subscription, invoice or receipt.

1. Do one of the following:
   - Click in the **Search** field on the Smile Menu Bar.
   - Press **ALT+S** or **CMD+S**.[1]
   - On the **Smile** menu, click **Find Customer**.

   The **Search** window is displayed. The most recent previous search results are displayed by default. Double-click a previous result entry to select it.

2. Type your search term in the **Search** field and press **Enter**.

   A list of results that match your search term appears.

3. Do one of the following:
   - Double-click the required entry in the search results.
   - Select the required entry, then click the 👁 icon.
   - Right-mouse click on the required entry and click **View**.

   Detail of the search result is displayed.

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[1] Your operating system or browser may override these key-combinations.