

## Configuring Email, GoCardless and PayPal

At the end of the re-enrolment process, you will need to send out emails to clients possibly collecting fees by Direct Debit via GoCardless or via our PaymentsOnline system. All these services are provided by third-party vendors, so we must make sure that SwimSoft is connected to them properly.

The first one to check is **Email Configuration**, you do this by going to **System Configuration** on the **Main Menu** and then press **Email Configuration**. All the boxes on the following page must be completed.

### Manage Email Settings

SMTP Email Server	<input style="width: 90%;" type="text"/>
SMTP Email Server Port <small>(leave blank for default)</small>	<input style="width: 90%;" type="text"/>
SMTP Email User	<input style="width: 90%;" type="text"/>
SMTP Email Password	<input style="width: 90%;" type="password"/>
SMTP Email From <small>(Usually same as Email User)</small>	<input style="width: 90%;" type="text"/>
SMTP Use SSL	<input checked="" type="checkbox"/> Yes

← Exit↻ Reset details💾 Save

Test Email To:

✉ Send Test Email

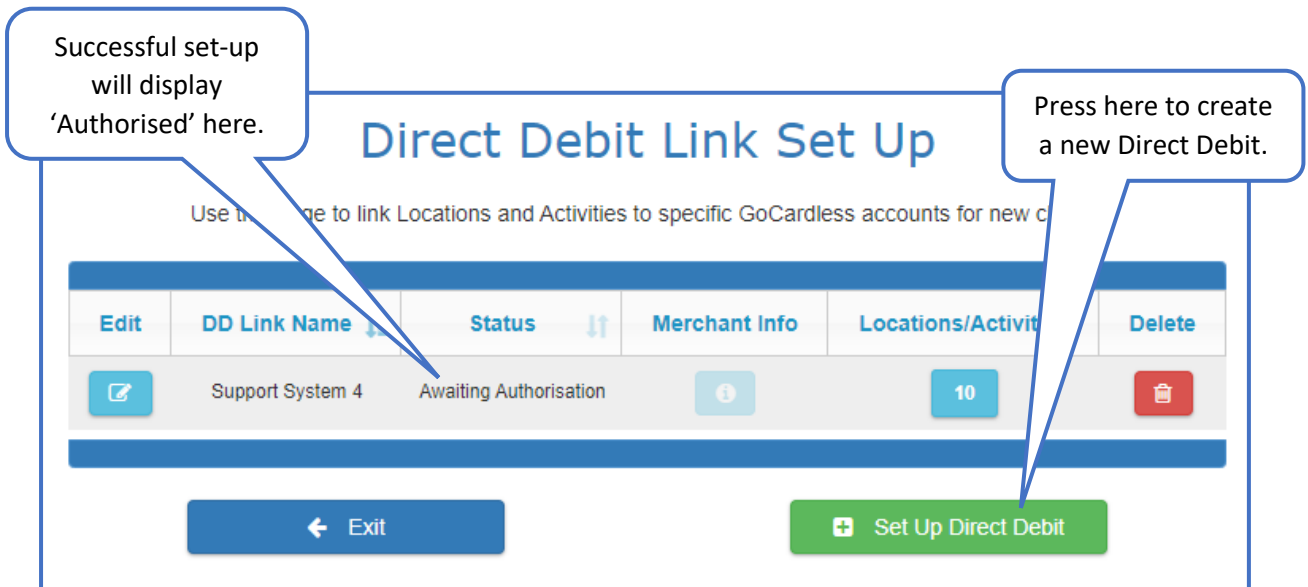
If you require a bulk email system please press the button below to visit SMTP2Go and create an account.  
Please note modest fees apply.

**SMTP2GO**

Once you filled in all the boxes, and your SMTP2Go account is set up, enter an email you have access to in the **Test Email To** box and press the blue **Send Test Email** button. You will get a pop-up to say if the test was successful or unsuccessful and from here you will either need to adjust some settings until you get a successful test or move on to the next step.

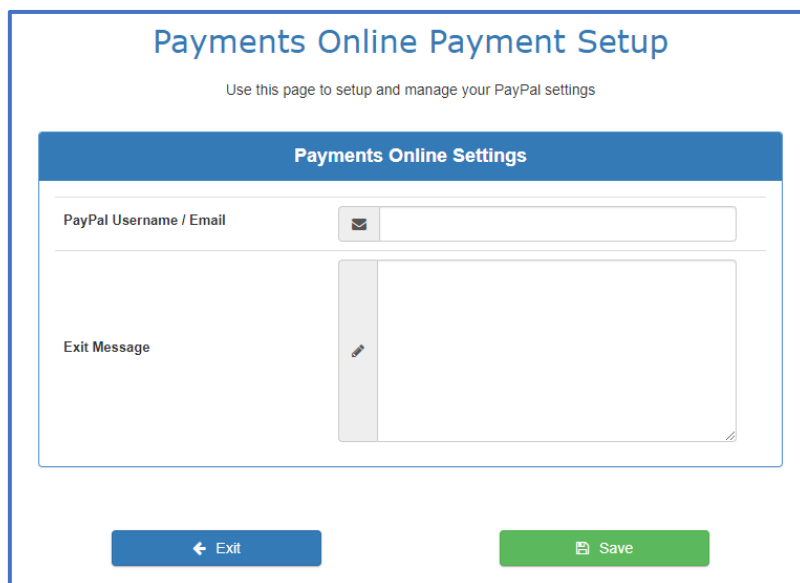
For instructions on how to configure your email, go to the **Email Configuration** page (as above) and press the **Help** button in the top-right corner.

The next thing to check is that your GoCardless is set up. All that you will need to do is to press **System Configuration** on the **Main Menu** and then **DDM Set Up** on the **sub-menu**. If you can see you have a DD Link Name set up and the Status is displaying as Authorised, you have configured your GoCardless already. If you do not see this, you will need to press the **Set Up Direct Debit** button and create a GoCardless account.



For more information on setting up Direct Debits, go to the **Knowledge Base** under the **Direct Debit** section and watch the videos and/or read the documents.

If you would like to collect your fees via PaymentsOnline/PayPal, you will need a PayPal business account. Instructions for configuring this are found by pressing **System Configuration** on the **Main Menu** and then **Payments Online Set Up** on the **secondary menu**.



Once you have a PayPal business account set up, enter it into the PayPal Username / Email box. The **Exit Message** is what will be displayed if the client begins the process of paying through the PaymentsOnline link, but does not complete their payment, you can put details on how to contact your organisation here in case they are having issues with the payment process.

Once these boxes have been filled, press the **Save** button.