

Configuring Email

Overview

The goal of this set of instructions is to help you configure SwimSoft Online so you can send out emails directly from your system. Simply read our guide to complete the system configuration.

Can your current email address be used for bulk emailing?

Before connecting your email address to SwimSoft, you need to check that your address will be suitable for bulk emailing.

Bulk emails can only be sent from an email address that is linked to your domain, for example, the email address support@morsolutions.co.uk is linked to the organisation MOR Solution.

Webmail services such as Gmail, Hotmail, or Yahoo will not work, because they are designed for private use, not business use.

If you don't have a domain related email address but you own a domain, contact the company you purchased your domain from or the company who created your web site. Naturally, if you don't have a domain you'll need to get one of these too. Domains can be purchased from companies such as 123 Reg, Go Daddy and Ionos, to name three, we have no preference and make no recommendation as to whom you should use.

NOTE, MOR Solution services do not include setting up web sites, purchasing domains, purchasing email addresses and configuring them, these services are normally provided by web developers.

Preparing to bulk email

SwimSoft has the capability of creating and releasing thousands of emails in a matter of a minute or two, all but a small handful of email service providers will allow you to send this many emails this quickly **you will** need to enlist the services of a bulk email service provider to send them.

Many SwimSoft users use the services of a company called SMTP2GO, because, for a modest fee you can both send a substantial amount of emails and as an added bonus you can review deliveries and failures too. The next section covers how to obtain an SMTP2GO account.

Obtaining an SMTP Email service from SMTP2GO

TIP: It is worth noting that the email address you use to create an SMTP2GO account does not have to be the one you want to send emails from, if many users will be managing the system, sign up using a shared email address that everybody can access, using a shared email address will mean that if a password is forgotten users will be able to recover or create a new one.

To create an SMTP2GO account press the black logo as shown below and sign up for the free account (you can convert it to a paid account later).

Manage Email Settings

SMTP Email Server	<input type="text"/>
SMTP Email Server Port <small>(leave blank for default)</small>	<input type="text"/>
SMTP Email User	<input type="text"/>
SMTP Email Password	<input type="password"/>
SMTP Email From <small>(Usually same as Email User)</small>	<input type="text"/>
SMTP Use SSL	<input type="checkbox"/> No

← 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.



Alternatively, you can press the following link to sign up to SMTP2GO.

<https://smtp2go.grsm.io/5x9ekwsrgu7l>

Once you have signed up for a service you will need to:

1. Define a user
2. Define your domain
3. Provide Cname setting to your web developer or apply them to your web site
4. Change Plan (select a plan) and add billing details.

Defining a user

Once you are logged into SMTP2GO press **Setting** then **Users** next press the blue **Add SMTP User** button. Type in the email address you want to send emails from and copy the password as you'll need to enter this into SwimSoft later, finally press the **Save** button.

Define your domain

Press **Settings** then **Sender Domains**, next press **Add a Domain** and enter your domain, do not start your entry with www. For example, our domain is www.morsolutions.co.uk so we entered **morsolutions.co.uk**, as this is our domain.

CNAME settings

Next, you will need to create three CNAME entries in your web hosting package. CNAME entries are used to authorise SMTP2GO to handle your emails, specifically, they allow receiving mail servers to check that the emails it is receiving from SMTP2GO have been approved for sending by your organisation. If you do not set up the CNAME entries in your hosting package emails may end up in clients junk or spam folders.

It is worth pointing out the clients can tag emails from you as junk or simply block them, you can't do anything about this other than speaking to the client and ask them to unblock your address. However, SMTP2GO gives you the ability to see if an email was blocked by a client, so you'll know why it was not seen by them. It is important to note that SMTP2GO only stores delivery data for 30 days, if you want to keep delivery information longer you will need to download it for storage in the location of your choice.

Once you have added a domain **click it** (it will be in your domain list), you will then see your CNAME settings on the page that opens, these are the settings you need to add to your hosting package.

TIP. You can often find videos on how to set up CNAME records on YouTube by searching **setting a CNAME record in (add your service providers name here 123 – reg etc)**

MOR Solutions can set up your CNAME setting with you but we do charge £20 for this service.

Selecting a plan

You can use the free plan whilst you are getting set up on your system, this has a sending limit of 1,000 emails per month, and a temporary rate limit of 25 emails/hour which is changed to 200 emails/day once you add a verified sender domain name, but when you go live you will need a paid plan so emails are handled quickly.

In the top right of the screen, you will see your name, use the drop-down and choose the option **Change Plan** then select a plan before pressing the **Update Plan** button, at this point, you will be required to complete billing information so you'll need a bank card or PayPal info. You can change the plan at any time so don't worry about choosing the right one the first time, if you exceed your plan's limit you will simply be charged a tiny amount for each additional email, it is better to commit to the highest plan you can as this will ensure you pay the lowest amount per individual email sent.

Configuring SwimSoft to work with SMTP2GO

To connect SwimSoft Online with SMTP2GO you will be required to enter six elements into SwimSoft, as detailed below. It's best to look up these elements or contact your service provider for them before proceeding online.

If you are not on the email configuration page, Press **System Configuration** and then **Email configuration**.

Now enter your values. SMTP2GO users should enter the values provided in the bold blue text below or the information requested (again in blue text).

- 1) SMTP Email Server Enter the name of the server SwimSoft Online needs to connect to, SMTP2GO users should enter **mail.smtp2go.com**
- 2) SMTP Email Server Port Enter the email address to be used, SMTP2GO users should enter **25**
- 3) SMTP Email User Enter the email address to be used, SMTP2GO users should enter **your business email address**.
- 4) SMTP Email Password Enter the password associated with the email account. SMTP2GO users should enter **the password copied earlier**

- 5) SMTP Email From Enter you 'from' email address. This is normally your email address again, SMTP2GO users should enter **your business email address**.
- Note. This value will be replaced automatically if an alternate 'from' email address has been specified in an activities **Activity Configuration** and **Setting** page in SwimSoft Online.
- 6) SMTP Use SSL Set this box to Yes if SSL is to be used, SMTP2GO users should set this to **Yes**

Ensure you click **Save** once all details have been completed.

Testing the System (Part one of two)

Once the settings have been entered and stored, test the system by sending a test email to an account you have access to, simply enter the test email address into the field labelled **Test email to:** then press the button marked **Send Test Email**.

If you get a success message the systems are connected, if you get any other message re-check the details entered, if they are wrong press the **Reset details** button and start again.

Note It is not a good idea to send your test email to and from the same email address, it is quite common for emails sent to him from the same email address not to arrive.

Testing the System (Part two of two)

Once you have completed the first test you will need to send an email from a **Client Data Sheet** to yourself to complete the end to end testing. If you see an error when performing this test, check the settings under **Activity Configuration** and **Address and Setting**, as well as the address you were trying to send to.

Note. If you have multiple locations and activities, the **Contact email** found under **Activity configuration** and **Address and Settings** will need to be checked for each location and activity in turn.

Note. Do not sent test email to the address you are sending from as they are liable to be blocked by your system, use a secondary email address.