

Configuring Email

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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 answer the questions below and follow our guidance to complete the system configuration.

Can your email address be used for bulk emailing?

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

Bulk emails can only be sent from an email address which 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 have a business-related email address skip forward to the section below **Is your email address restricted**.

If you don't have one you but you own a domain (web address) simply contact the company who created your web site, or the company you purchased your domain from. 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 1 & 1, 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 address and configuring them, these services are normally provided by web developers.

Is your email address restricted?

Once you have an email address it does not mean you can simply connect it to SwimSoft and send as many emails as you want. You now need to determine if you can connect SwimSoft directly to your email service provider, to do this you need to know if the system you have will handle the amount of emails you want to send. All email service providers impose limits and may throttle your service.

If you exceed a daily sending limit all additional emails can be dropped, the worst thing about breaking a limit is that you will not realise your emails are not being sent, so it is imported to check what limits apply.

Some service providers will throttle your emails if you exceed a limit, this means that ever additional email sent after the limit is reached will be released/sent but at a very slow rate, possible 10 and hour! This can make you think emails are not being sent.

Therefore, it is very important ask your email service provider what limits apply to your email system and if they throttle messages.

In some cases, when you ask if limits or throttling occur and the service provider is vague, if this occurs you should assume limits apply, as it is quicker and easier to set up your system for bulk emailing than it is to try and correct errors.

If you have a domain related email address and you are happy you can work within your service providers limits, you can complete the email configuration page as detailed in the section **Configuring SwimSoft To Send Emails**

If your service providers limits are too restrictive, you can use the services of an SMTP email relay provider, these service providers allow an unlimited (based on the service purchased) number of emails to be sent. 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, but you can also review failures too.

If you need to use a service like SMTP2GO you'll need to get and SMTP2Go account and connect SwimSoft to it

Obtaining an SMTP Email Service from SMTP2GO

Just follow the link below and sign up for the free account. (we can convert it to a paid account later)

<https://www.smtp2go.com/?s=r Morrish@morsolutions.co.uk>

Note: You can also press the black logo on SwimSoft Online's email configuration page to sign up too.

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

1. Define a user
2. Define your domain
3. Provide SPF details 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** then 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 shortly, finally press the **Save** button.

Define your domain

Press **Settings** then **Sender Domains** 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.

Configure SPF

Sender Policy Framework (SPF) is a simple email-validation system designed to detect email spoofing by providing a mechanism to allow receiving mail exchangers to check that incoming mail from a domain comes from a host authorized by that domain's administrators

Once you have added a domain **click it** in the list, you will then see the text **Enter this value**, this is what you need to paste into the SFP section of your web site. Next press the link **Configuring SPF** to get full instructions on setting your SPF Record.

TIP. You can often find videos on how to set up SPF record's on You Tube by searching **setting and SFP record in (add you service provider here 123 – reg etc)**

Select a plan

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 his point you will be required to complete billing information so you'll need a bank card or PayPal info.

Configuring SwimSoft to send email

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

1) SMTP Email Server

Enter the name of the server SwimSoft Online needs to connect to, for SMTP2GO enter **mail.smtp2go.com**

2) SMTP Email Server Port

Enter the email address to be used, for SMTP2GO enter **25**

3) SMTP Email User

Enter the email address to be used, for SMTP2GO enter **your business email address**.

4) SMTP Email Password

Enter the password associated with the email account. for SMTP2GO enter **the password copied earlier**

5) SMTP Email From

Enter the required 'from' email address. Normally your email address again, for SMTP2GO 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

Tick this box if SSL is to be used, for SMTP2GO enter **yes**

Ensure you click **store** 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 in to the field labelled **test email to**, then press the button marked **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.

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 **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 **Settings** will need to be checked for each location and activity in turn.

If any aspect of this manual needs improvement please email support@morsolutions.co.uk with your suggestion(s).

