

Configuring SMTP E-Mail in ClientBase Windows

If you would like to be able to send formatted text or HTML e-mails from ClientBase Windows, your mail server and ClientBase e-mail settings must be configured for SMTP.

Finding Mail Server's SMTP Settings

SMTP (Simple Mail Transfer Protocol) is a standard language used for sending e-mail on the Internet or a network. Every mail server is capable of handling SMTP e-mail. Your agency can utilize this SMTP feature providing it has the proper mail server configuration. Contact the entity responsible for maintaining your mail server to confirm your SMTP settings:

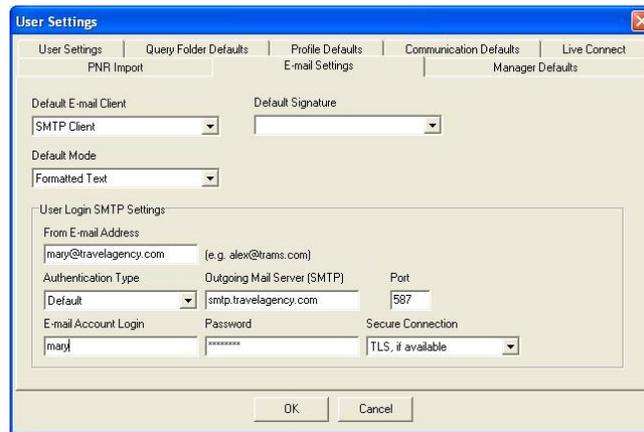
- If you are hosting your own e-mail server, contact the tech person who maintains or originally setup your server.
- If you are using another party for your e-mail server, contact them by going to their web site or contacting their support line.

You will need the following information:

1. Your e-mail address
2. Authentication type - does your e-mail server require authentication to send e-mail?
3. Outgoing mail server - e.g., smtp.domainname.com, mail.domainname.com, etc.
4. Outgoing mail port
5. E-mail account login
6. Password
7. Whether your e-mail server requires a secure connect, and if so, what type.

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Once you have gathered the information needed to setup your e-mail, click on **Utilities | My Login** (in ClientBase Windows) or **Tools | My Login** (in ClientBase Online/Browser). Then click on the **E-mail Settings** tab. You will be presented with the following screen. Note that these settings are user login-specific, so they need to be repeated for each ClientBase user.



Fill in the top half of the screen to choose your default options when sending e-mail.

- Default E-mail Client: SMTP Client
- Default Signature: choose a default signature if desired
- Default Mode: Choose from the list. *Formatted Text* is the most common

In the **User Login SMTP Settings**, enter the information that you gathered above. Note that the **From E-mail Address** you enter here will be displayed to your e-mails recipients. If you would rather your recipients see both your name **and** your e-mail address, you can use the format:

Mary Jones <mary@travelagency.com>

If your e-mail provider does not require a secure connection, e-mail settings are complete. If your e-mail provider does require a secure connection, complete the following steps on each computer from which you want to send e-mail.

Configuring Secure Connections

Some e-mail providers require an encrypted connection to send e-mail. ClientBase Windows uses a third-party to provide the encryption. These steps explain how to install the third party's encryption software.

Note: These steps are only required for ClientBase Windows users. ClientBase Online users need not complete these steps for establishing a secure e-mail connection.

First, click on the following link or copy and paste into your browser's address bar:

<https://www.siproweb.com/products/Win32OpenSSL.html>

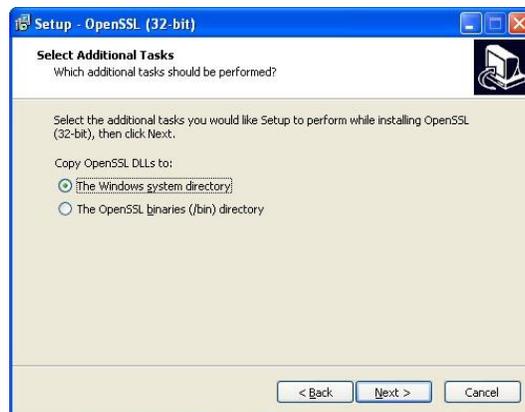
Scroll down and install these two essential executables:

File	Type
Win32 OpenSSL v1.0.0a Light	1MB Installer
Visual C++ 2008 Redistributables	1.7MB Installer

Important: Download and install the Visual C++ 2008 Redistributables file before downloading and installing the Win32 OpenSSL file. It is important to always download the 32-bit version of OpenSSL because ClientBase is a 32-bit program.

Also, the company releases new versions regularly, so the 'a' may be any letter.

During the installation process for Win32 OpenSSL, you can accept the defaults for most of the settings. When prompted for where you want to Copy OPENSSL DLLs to:, choose the Windows system directory.



Once you have installed both OpenSSL and Visual C++ Redistributables, reboot your computer.

SMTP Settings for Major Internet Service Providers (ISPs)

The following lists settings for some common ISPs. Please note that these settings may change. Check the provider's web site for the most up-to-date information.

AOL

Authentication Type: Default
Outgoing Mail Server: smtp.aol.com
Port: 465 or 587

Secure Connection: SSL

AT&T Yahoo

Authentication Type: Default
Outgoing Mail Server: smtp.att.yahoo.com
Port: 465 or 587
Secure Connection: SSL

GMail (Also works for Google Apps)

Authentication Type: Default
Outgoing Mail Server: smtp.gmail.com
Port: 587 (may also be 465)
Account Login: Full e-mail address (e.g., name@gmail.com)
Password: Your Gmail password
Secure Connection: TLS, if available

GoDaddy

Authentication Type: Default
Outgoing Mail Server: smtpout.secureserver.com
Port: 80
Account Login: Full e-mail address (e.g., name@gmail.com)
Password: Your GoDaddy e-mail password
Secure Connection: SSL

Hotmail

Authentication Type: Default
Outgoing Mail Server: smtp.live.com
Port: 465 or 587
Secure Connection: SSL

Yahoo

Authentication Type: Default
Outgoing Mail Server: smtp.mail.yahoo.com
Port: 465 or 587
Secure Connection: SSL

Note that the free version of Yahoo mail does not support SMTP. You must subscribe to Yahoo Mail Plus or Business.