

# ClientBase Online

## Set Up SMTP E-mail



### Configuring SMTP E-Mail in ClientBase Online

If you would like to be able to send e-mails directly from ClientBase Online (CBO), 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.

### Configuring SMTP E-Mail in ClientBase

Once you have gathered the information needed to setup your e-mail, click **Tools | My Login** in ClientBase Online. Then click on the **Email 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 Online user.

My Login

**E-Mail Settings**

From E-Mail Address:	<input type="text" value="mary@agency.com"/>
Outgoing Mail Server (SMTP):	<input type="text" value="smtp.gmail.com"/>
Port:	<input type="text" value="465"/>
Authentication Type:	<input type="text" value="Default"/> ▼
E-Mail Account Login:	<input type="text" value="mary@agency.com"/>
Password:	<input type="password" value="*****"/>
Secure Connection:	<input type="text" value="TLS, if available"/> ▼
E-mail Mode:	<input type="text" value="HTML"/> ▼

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-mail's 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.

## 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.*

## Email from CBO

Merge to Email can be launched 1) From the results of a search for multiple profiles using *Simple Search* or *Advanced Search*; or 2) From within a single profile by clicking the action gear next to the client's name in the Profile Manager or within a client profile by clicking *Merge to Email* on the toolbar.

E-Mail addresses are kept in the communication entry area found in the general information link of all types of profiles. Only emails that are marked with marketing permission can be used with Merge to PNR.

**1) Using Merge to E-Mail from the results of a search:** When merging information into an email, merge the information to multiple emails from the search results area by clicking *Merge to*/*Merge to Email* in the Profile Manager toolbar. A dialog box appears. Select how emails are to be sorted by selecting *Name*, *First Name*, *Last Name*, and *Email* (default). Choose *Primary E-Mail Only* or *All E-Mails in Profile*. By default only emails with marketing permission is checked off.

**2) Using Merge to E-Mail for a single profile:** Click the toolbar *Merge to*/*Merge to Email* inside the client's profile, or directly from the profile search results screen, by clicking the *Action Gear* located beside the selected profile entry. If more than one email exists within the profile, a grid appears allowing you to select the desired emails you would like to send to.

**3) Preparing Emails to Send:** For each email being sent, notice the *Profile Name*, *Address*, *Phone* and *Fax Numbers*. To get to other emails in the series, use the navigation buttons, *First*, *Previous*, *Next*, and *Last*. Any data entered into the first email entry screen appears automatically in the other emails in the series.

**To:** Includes each individual email address matching your criteria.

**Subject:** Type the subject of the email. Any email sent **MUST** have a subject.

**CC:** Enter any email that you want to receive a copy of this email. (Remember, this appears automatically in the other emails in the series.)

**Priority:** Select a priority label from the drop-down menu of *Highest*, *High*, *Normal*, *Low* and *Lowest*.

**Mode:** From the drop-down, select, *Plain Text* or *HTML*. If you select *HTML*, two tabs appear, one labeled *Compose* and one labeled *HTML*.

Use the *Compose* tab to type and format your HTML without knowing how to code HTML. A formatting toolbar is included that makes formatting your text, inserting links, pictures and tables very easy. Use the *HTML* tab if you have Raw HTML that you would like to paste into the email. Anything entered into the *Compose* tab will then be formatted in raw HTML upon clicking the *HTML* tab. Anything entered into the *HTML* tab will then be formatted upon clicking the *Compose* tab.

**Insert Field/Load Template:** Complete your message by using any of the global document templates setup by the database administrator in the Windows version of ClientBase.

**Tip:** If you select **Salutation|Courtesy Title Last Name**, or **Salutation|First Name**, or **Salutation|Name** as a merge field, the | character included in the Salutation means that if the Salutation field is not completed within one of the resulting profiles, then for just that profile, you want it to use the merge field following the |. For any of the name field merge fields, if the email is linked to a passenger, then the passenger's name fields will be merged. If the email is not linked to a passenger, then the profile name fields will be merged.

**Preview:** This option allows you to preview message in its formatted state before sending.

**Attachments:** Add an attachment to email by clicking *Browse* to locate the attachment, and then *Attach*.

**Mailer:** To keep a history of any emails sent, be sure to create a *Mailer* record by clicking on the *Mailer* link. These mailers then create a history within each profile whenever an email is sent.

**Mail Date/Time:** By default, the date and time are auto-filled. These can be changed manually by using the dropdowns.

**Subject:** Choose a subject for the mailer from the drop-down menu with items setup by the database administrator in the Windows version of ClientBase. By choosing from the drop-downs, consistency is assured for reporting and querying purposes.

**Body:** By default, the mailer retains a copy of the body of the email.

Click *OK* to save.

#### 4) Sent Emails

All emails sent from ClientBase create an email job at your SMTP server which can be monitored by clicking the *All Email Jobs* link. This link allows you to monitor jobs that have not yet been completed to view the status. If you want to cancel an email job before it is finished, you can do so by clicking the *Cancel* link next to the job. *Purge Inactive* then deletes any jobs from the listing once they have been cancelled. All email jobs that have completed successfully are automatically be purged from the listing. To return to your email upon viewing this log, click *Done*.

**Tip: If someone wants to be removed from the email list, go into the profile and uncheck marketing permission for that email entry.**

### Sending Text Messages from Any Email Program

You can input a person's cell phone number followed by the @ sign and a proper domain depending on the carrier (AT&T, Verizon, Sprint, etc.) as an email address, and this indeed will send it as text message to them. To do this:

1. Enter it as an email address entry.
2. Ask for the cell carrier.
3. Enter a description of SMS (or something like that) to help locate it.

**Example:** If my cell is 310-293-4444 and my carrier is AT&T, then email me a text at 3102934444@txt.att.net.

- **AT&T** – [cellnumber@txt.att.net](mailto:cellnumber@txt.att.net)
- **Verizon** – [cellnumber@vtext.com](mailto:cellnumber@vtext.com)
- **T-Mobile** – [cellnumber@tmomail.net](mailto:cellnumber@tmomail.net)
- **Sprint PCS** - [cellnumber@messaging.sprintpcs.com](mailto:cellnumber@messaging.sprintpcs.com)
- **Virgin Mobile** – [cellnumber@vmobl.com](mailto:cellnumber@vmobl.com)
- **US Cellular** – [cellnumber@email.uscc.net](mailto:cellnumber@email.uscc.net)
- **Nextel** - [cellnumber@messaging.nextel.com](mailto:cellnumber@messaging.nextel.com)
- **Boost** - [cellnumber@myboostmobile.com](mailto:cellnumber@myboostmobile.com)
- **Alltel** – [cellnumber@message.alltel.com](mailto:cellnumber@message.alltel.com)