



GUIDE TO BROWSER SCHEDULER EMAIL CONFIGURATION

SCHEDULER EMAIL OVERVIEW

- You will need to use the credentials for your SMTP configuration. SMTP (Simple Mail Transfer Protocol) is the procedure for sending e-mail messages between servers. The majority of e-mail setups that send mail over the Internet use SMTP. The messages can then be retrieved with an e-mail client using either POP or IMAP.
- The Scheduler only needs the outgoing information from your SMTP server. The ports used for this server will vary based on your authentication method.
- Note that the username and password can simply be any email login tied to that server; it does not need to be a mail admin, just any mail user will point the program in the right direction so it knows where to connect.
- Unless your email server is configured to require an account exists directly in the email client, the “from email address” does not need to be a real email address with an associated account. You can type in any descriptive address that users will receive reports from (example: “Reports@Bobsconstruction.com”).

Email Settings

Outgoing Mail Server:

Server Port:

Use Transport Layer Security (TLS)

User Name:

Password:

Confirm Password:

* After initial setup your password will not be loaded.
To change your password just type the new password and confirm.

From email address:

Test email address:

SEND TEST EMAIL FAILED

- Ensure the User Name has “@____.com” (or .edu)
- Try making the From Email Address a real email address. You can use the same email from the User Name field. If it works, this indicates that an actual email account must be created in your mail client to use as the Scheduler sender. You can work with your internal mail admin to create a “no reply” email that reads “reports” in the title. Otherwise it looks like that user is sending the reports and users can reply to those emails.
- You can email your Apache Tomcat log file to the CompuSoft Support team to assist with troubleshooting the origin of the email configuration problem. This log file is on the Tomcat server, usually under C>Program Files>Apache>Logs. It is the most recently timestamped “Synoptix Server” log. Email to support@compusoftdevelopment.com
- If settings are correct and email issues persist, internal settings may need to be adjusted. For example, if you are using port 25, a username and password are not required. If you have TLS enabled, the port number will typically be 587 or 465. These are questions to resolve to your internal mail admin.

COMMON MAIL CLIENT DEFAULTS & HOW TO FIND SMTP SETTINGS

OUTLOOK

Outlook default settings

SMTP server: smtp-mail.outlook.com.

Port: 587

SMTP TLS/SSL required: yes

- **Outlook for PC - locate SMTP details**

In Outlook, click File. Then navigate to Account Settings > Account Settings.

On the Email tab, double-click on the account you want to connect to HubSpot.

Below Server Information, you can find your incoming mail server (IMAP) and outgoing mail server (SMTP) names.

To find the ports for each server, click More settings... > Advanced.

Outlook for Mac - locate SMTP details

Click Outlook in your Mac's toolbar.

Select Preferences, then click Accounts.

Find the fields for Incoming server and Outgoing server. The longer text box is the server name and the text box towards the right is the port.

OFFICE 365

365 default settings

SMTP server: smtp.office365.com

Port: 587

SMTP TLS required: yes

GMAIL

- Gmail's Outgoing Mail Server will use the SMTP mail server address provided by your local ISP.

Gmail default settings

Gmail SMTP server address: smtp.gmail.com

Gmail SMTP username: Your Gmail address (e.g. example@gmail.com)

Gmail SMTP password: Your Gmail password

Gmail SMTP port (TLS): 587

Gmail SMTP port (SSL): 465

Gmail SMTP TLS/SSL required: yes

APPLE MAIL (MAC DESKTOP)

Locate SMTP details

Click Mail in your Mac's toolbar, then select Preferences from the dropdown menu.

In the left sidebar, select the account you want to connect to HubSpot.

Select Account Information.

Find the field for Incoming Mail Server. This value is your IMAP server name.

Next, find the field for Outgoing Mail Server. You may need to use the dropdown menu to select Edit SMTP server list to view the SMTP server name. You can also find your SMTP port here.

YAHOO

Yahoo default settings

Server Address: smtp.mail.yahoo.com.

Username: Your Yahoo Address (e.g. example@yahoo.com) Password: Your Yahoo Password.

Port Number: 465 (With SSL) Alternative Port Number: 587 (With TLS)

LIVE

Live default settings

Outgoing: smtp.live.com

User Name is your entire email address (@live.com)

Outgoing Server Port: 25 (Requires TLS)

Additional notes on ports:

- Non-encrypted: 25 or 587
- Secure (TLS): 587
- Secure (SSL): 465

Additional notes on other mail clients:

- Amazon SES requires you to use the SMTP port 25, 465 (with a secure SSL) or 587
- Mandrill: You can connect via unencrypted or TLS on ports 25, 2525, and 587. You can connect via SSL on port 465

Locating the SMTP mail server tied to an email address:

- Open a DOS Command Prompt.
- Type "nslookup".
- Your computer's DNS Server name and IP address will be displayed.
- Type "set type=mx" - This will cause NSLOOKUP to only return what are known as MX (Mail eXchange) records from the DNS servers. For example, type "hotmail.com" or use your own domain name.