

# Configuring Outbound Emails in Client Engager Mail

12 Steps

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Created by

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Creation Date

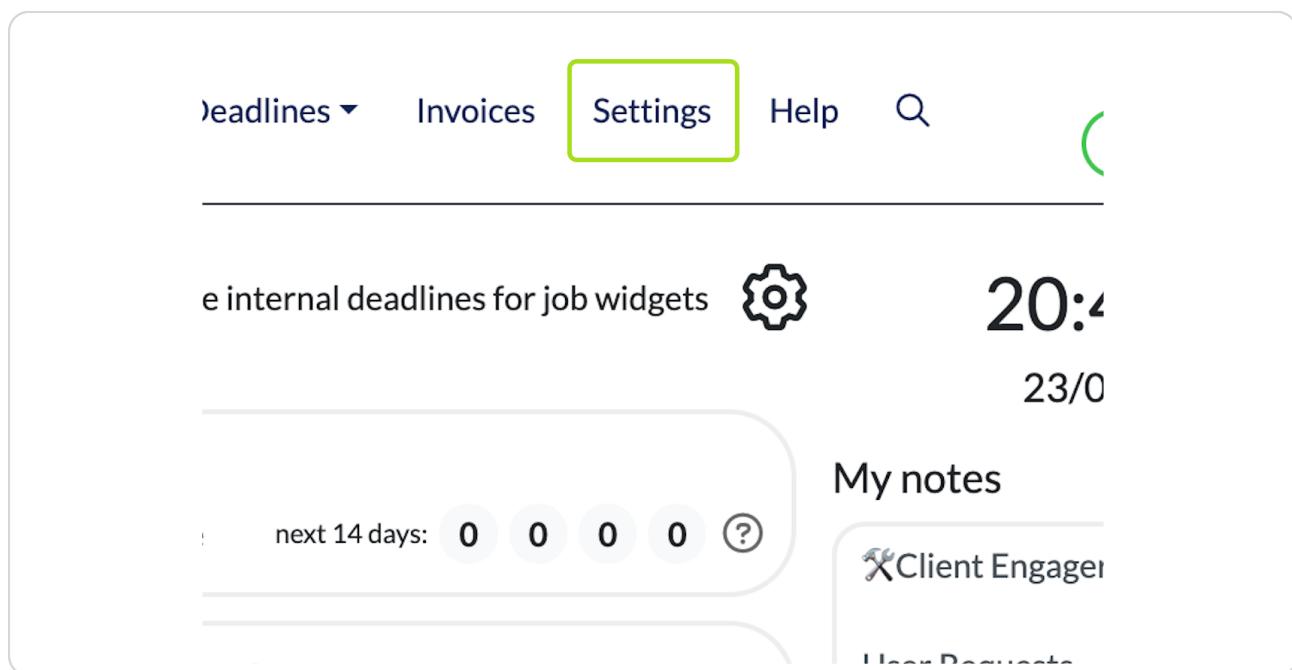
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May 23, 2023

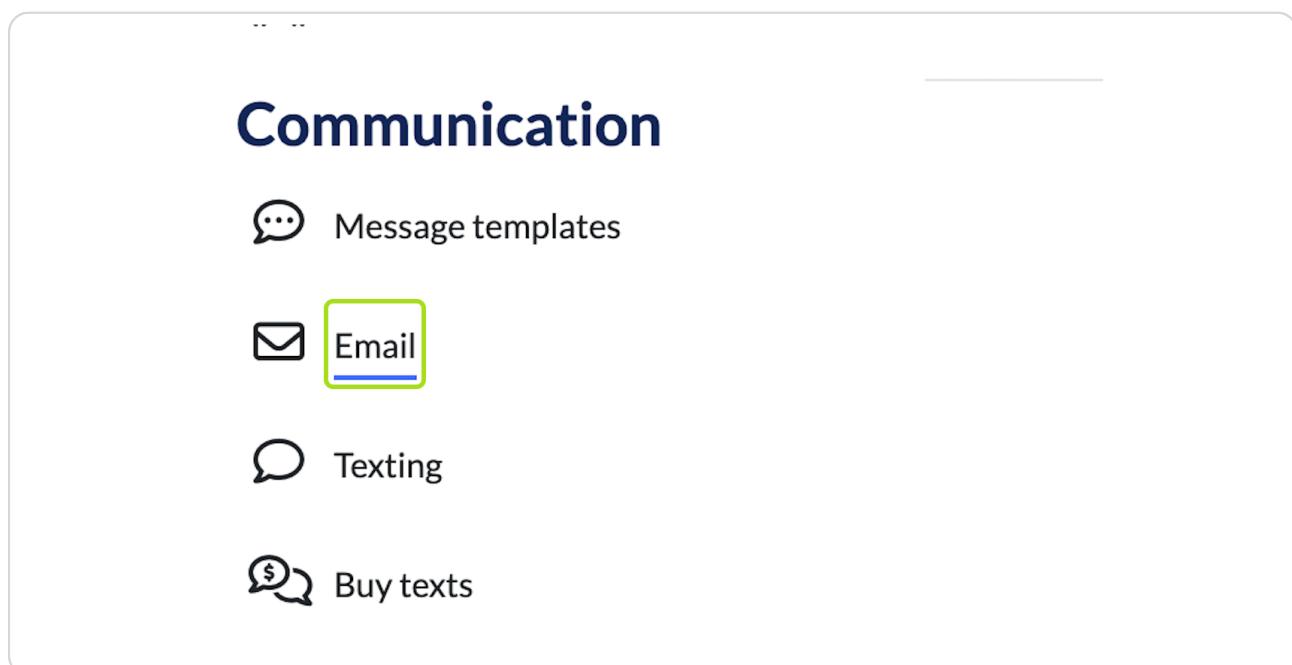
## STEP 1

### Click on Settings



## STEP 2

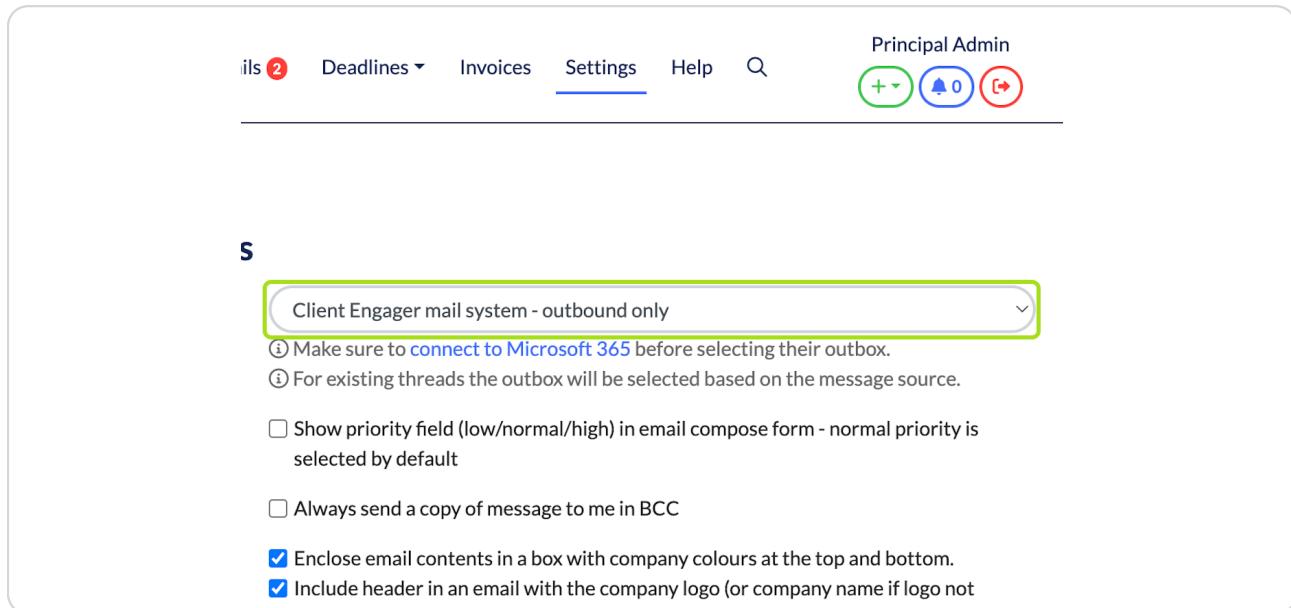
### Click on Email



## STEP 3

### Choose which outbox will be your default outbox

Assuming you have linked Office 365 you can choose various options, if you haven't linked Office 365 then you will only have one option



Principal Admin

Client Engager mail system - outbound only

ⓘ Make sure to [connect to Microsoft 365](#) before selecting their outbox.

ⓘ For existing threads the outbox will be selected based on the message source.

Show priority field (low/normal/high) in email compose form - normal priority is selected by default

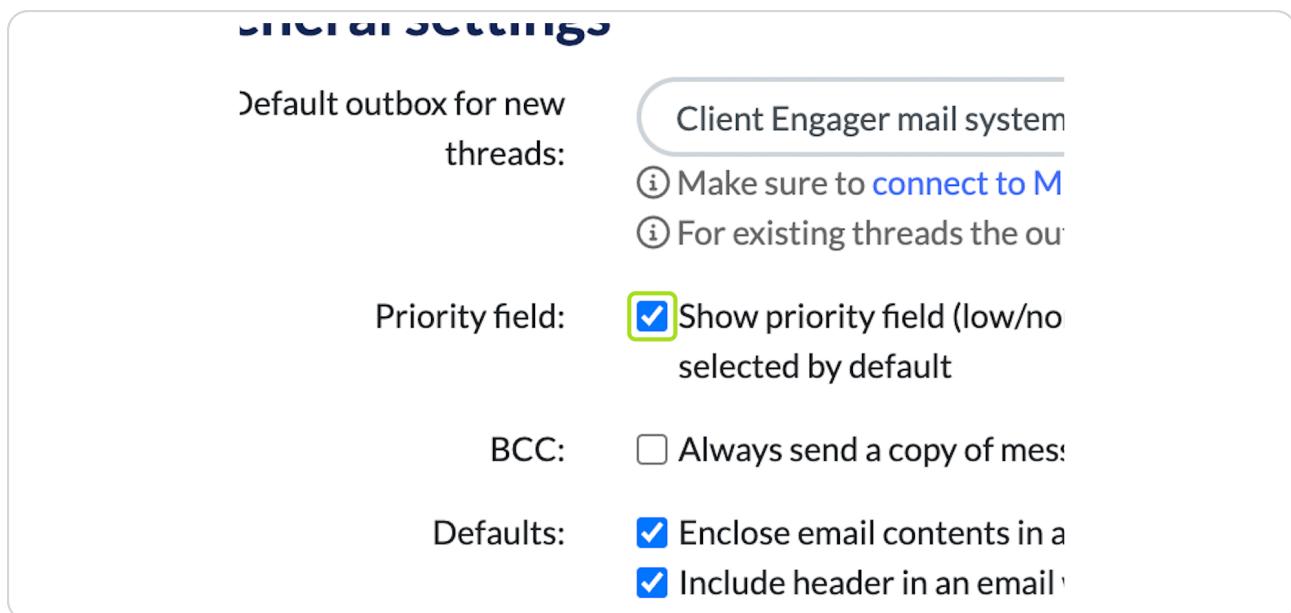
Always send a copy of message to me in BCC

Enclose email contents in a box with company colours at the top and bottom.

Include header in an email with the company logo (or company name if logo not

## STEP 4

### Check Show priority field (low/normal/high) in email compose form if you want this turned on



Default outbox for new threads: Client Engager mail system

ⓘ Make sure to [connect to M](#)

ⓘ For existing threads the ou

Priority field:  Show priority field (low/no selected by default)

BCC:  Always send a copy of mess

Defaults:  Enclose email contents in a

Include header in an email

## STEP 5

### select if Always send a copy of message to me in BCC is needed

S

Client Engager mail system - outbound only

ⓘ Make sure to [connect to Microsoft 365](#) before selecting their outbox.  
 ⓘ For existing threads the outbox will be selected based on the message source.

Show priority field (low/normal/high) in email compose form - normal priority is selected by default

Always send a copy of message to me in BCC

Enclose email contents in a box with company colours at the top and bottom.  
 Include header in an email with the company logo (or company name if logo not uploaded).  
 Include footer in an email.  
 Include Client Portal link in an email.

ⓘ You can use placeholder [Logo] to insert your company logo into a footer, provided you have uploaded one in 'Company Details'.

## STEP 6

### choose if you want to Enclose email contents in a box with company colours at the top and bottom.

Priority field:  Show priority field (low/no selected by default)

BCC:  Always send a copy of mes:

Defaults:  Enclose email contents in a  
 Include header in an email (uploaded).  
 Include footer in an email.  
 Include Client Portal link in

Footer: ⓘ You can use placeholder [Logo]

## STEP 7

**choose if you want to Include header in an email with the company logo (or company name if logo not uploaded).**

Priority field:  Show priority field (low/no selected by default)

BCC:  Always send a copy of message to me in BCC

Defaults:  Enclose email contents in a box with company colours at the top and bottom.  
 Include header in an email with the company logo (or company name if logo not uploaded).  
 Include footer in an email.  
 Include Client Portal link in an email

Footer:  ⓘ You can use placeholder [Logo] to insert your company logo into a footer, provided you have uploaded one in 'Company Details'.

## STEP 8

**choose if you want to Include Client Portal link in an email.**

Show priority field (low/normal/high) in email compose form - normal priority is selected by default

Always send a copy of message to me in BCC

Enclose email contents in a box with company colours at the top and bottom.

Include header in an email with the company logo (or company name if logo not uploaded).

Include footer in an email.

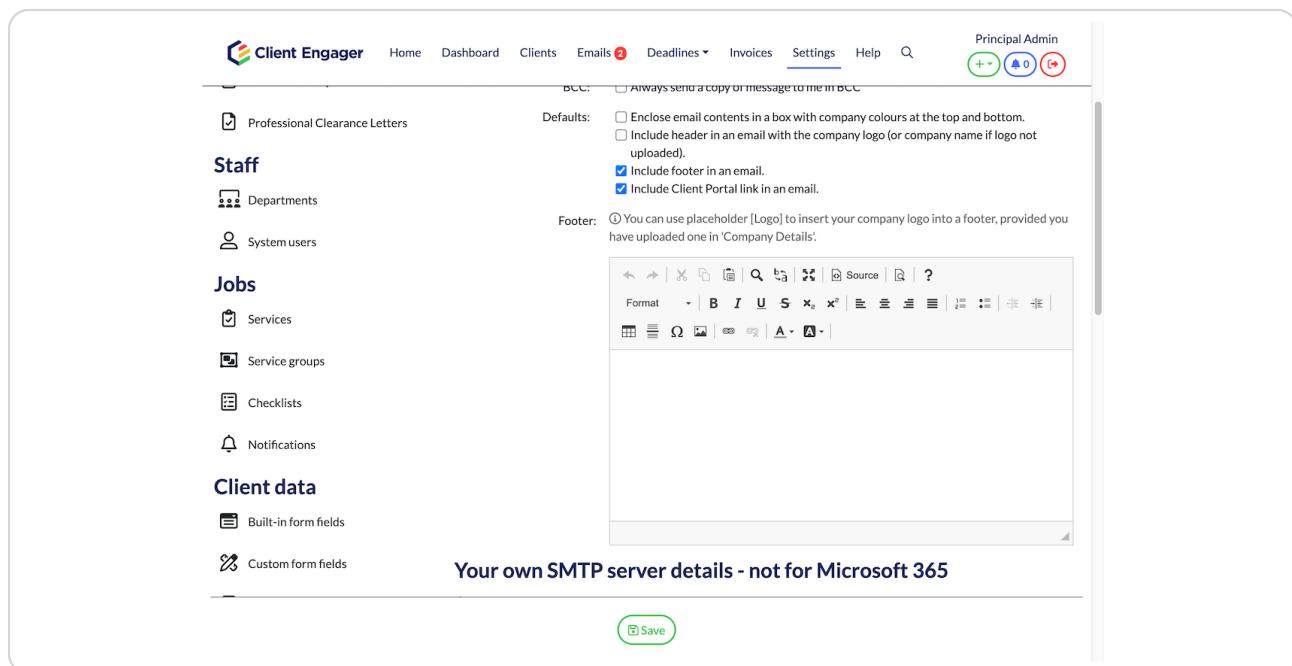
Include Client Portal link in an email.

ⓘ You can use placeholder [Logo] to insert your company logo into a footer, provided you have uploaded one in 'Company Details'.



## STEP 9

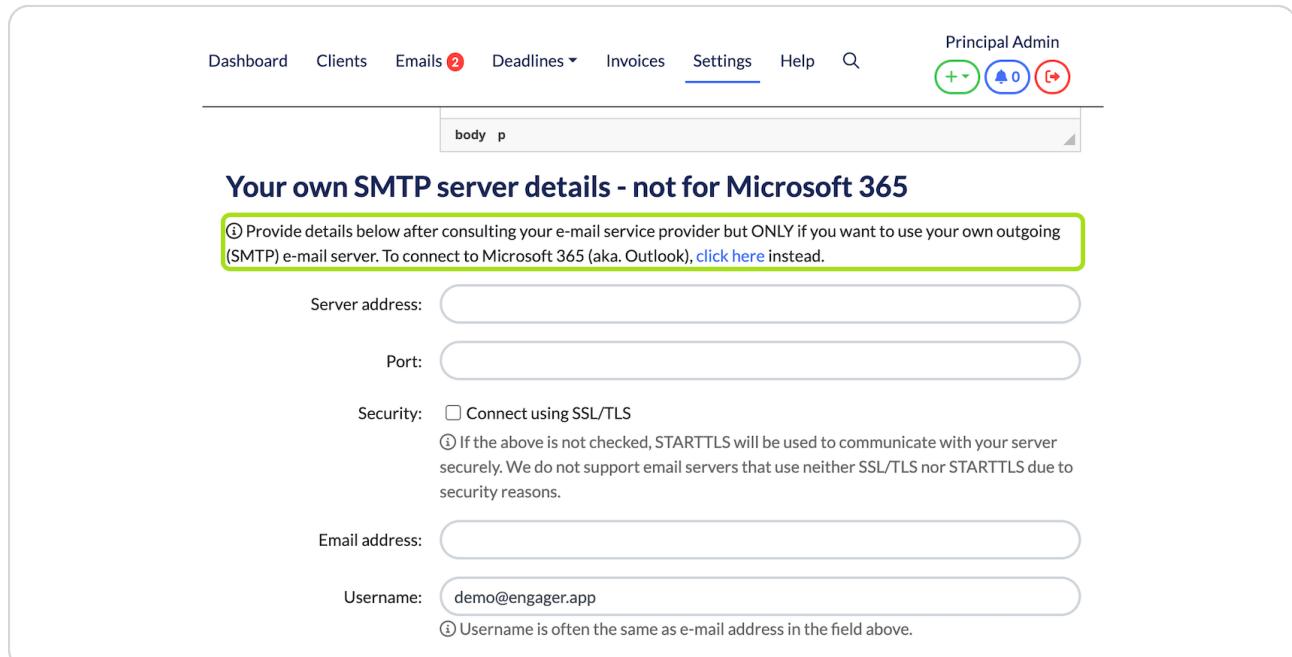
### Enter the footer information you want to be included



The screenshot shows the 'Settings' page in Client Engager. The 'Footer' section is highlighted. It includes a 'BCC' dropdown with an option to 'Always send a copy of message to me in BCC'. Below this are 'Defaults' checkboxes for enclosing email contents in a box with company colours, including a header with the logo, and including a footer in the email. There is also a checkbox for including a Client Portal link. A 'Footer' text area is present with a placeholder for a company logo and a note about uploaded logos. A rich text editor toolbar is shown above the footer area. At the bottom, there is a 'Save' button.

## STEP 10

### If you haven't linked office 365 then enter your SMTP settings here



The screenshot shows the 'Settings' page in Client Engager, specifically the 'Your own SMTP server details - not for Microsoft 365' section. A note at the top says: 'Provide details below after consulting your e-mail service provider but ONLY if you want to use your own outgoing (SMTP) e-mail server. To connect to Microsoft 365 (aka. Outlook), [click here](#) instead.' Below this, there are fields for 'Server address' and 'Port'. A 'Security' section includes a checkbox for 'Connect using SSL/TLS' with a note explaining that STARTTLS will be used if it's not checked. There are also fields for 'Email address' and 'Username' (with a note that it's often the same as the email address).

## STEP 11

### Click on Test server connection

:   
ⓘ Username is often the same as e-mail address in the field above.

:   
ⓘ This field is empty for security reasons. If you have already set a password for your e-mail account, there is no need to type it in here again, unless you want to change it.

:   
ⓘ Remember to save settings after testing the connection.

## STEP 12

### Click on Save



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