

Configuring Outbound Emails in Client Engager Mail

12 Steps [View most recent version on Tango.us](#) 

Created by

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Creation Date

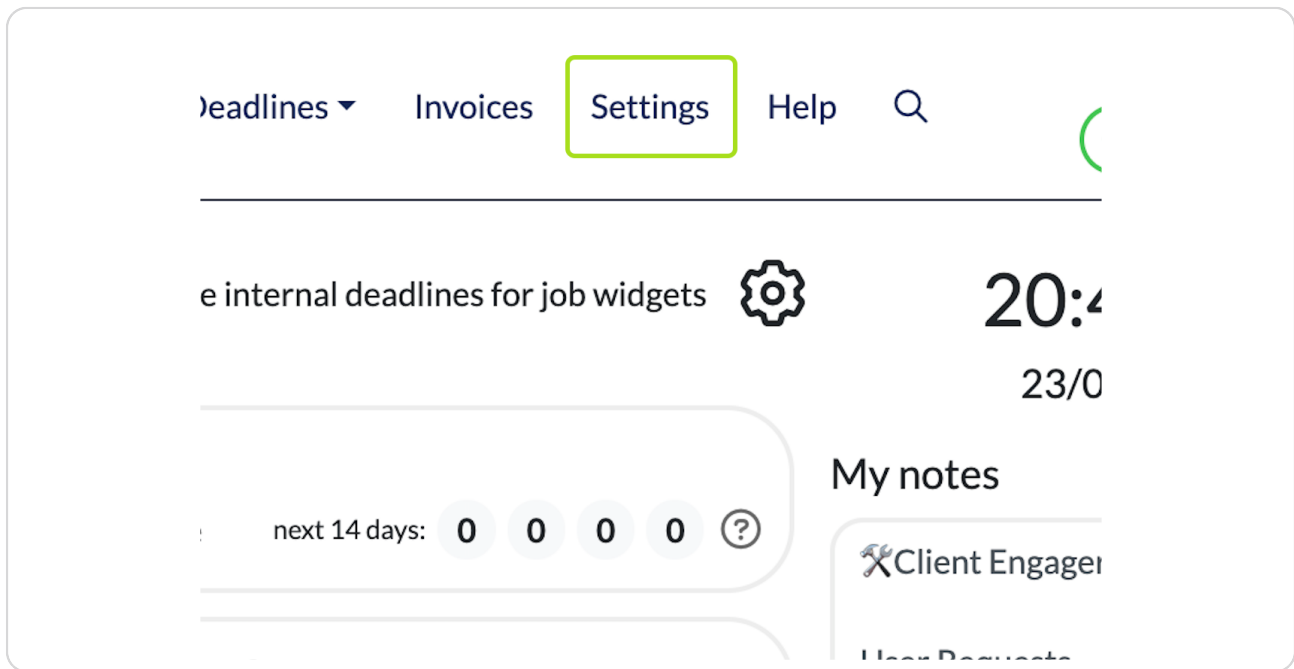
May 23, 2023

Last Updated

May 23, 2023

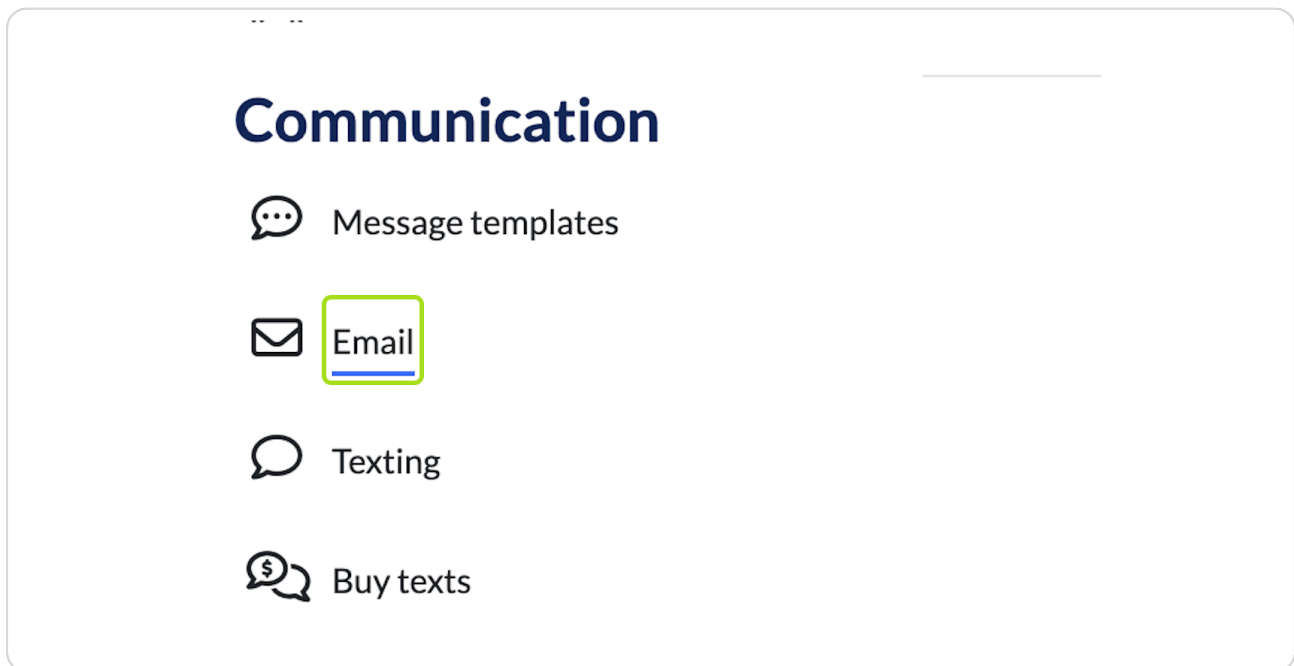
STEP 1

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

Messages 2 Deadlines Invoices **Settings** Help

Principal Admin

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)

STEP 4

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

General settings

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 mes

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.

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

Priority field: ☒ Show priority field (low/normal/high) in email compose form - normal priority is 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'.

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 messages

Defaults:

- ☐ Enclose email contents in a
- ☒ Include header in an email (if not uploaded).

☒ Include footer in an email.

☒ Include Client Portal link in

Footer: ⓘ You can use placeholder [Log
have uploaded one in 'Company

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.

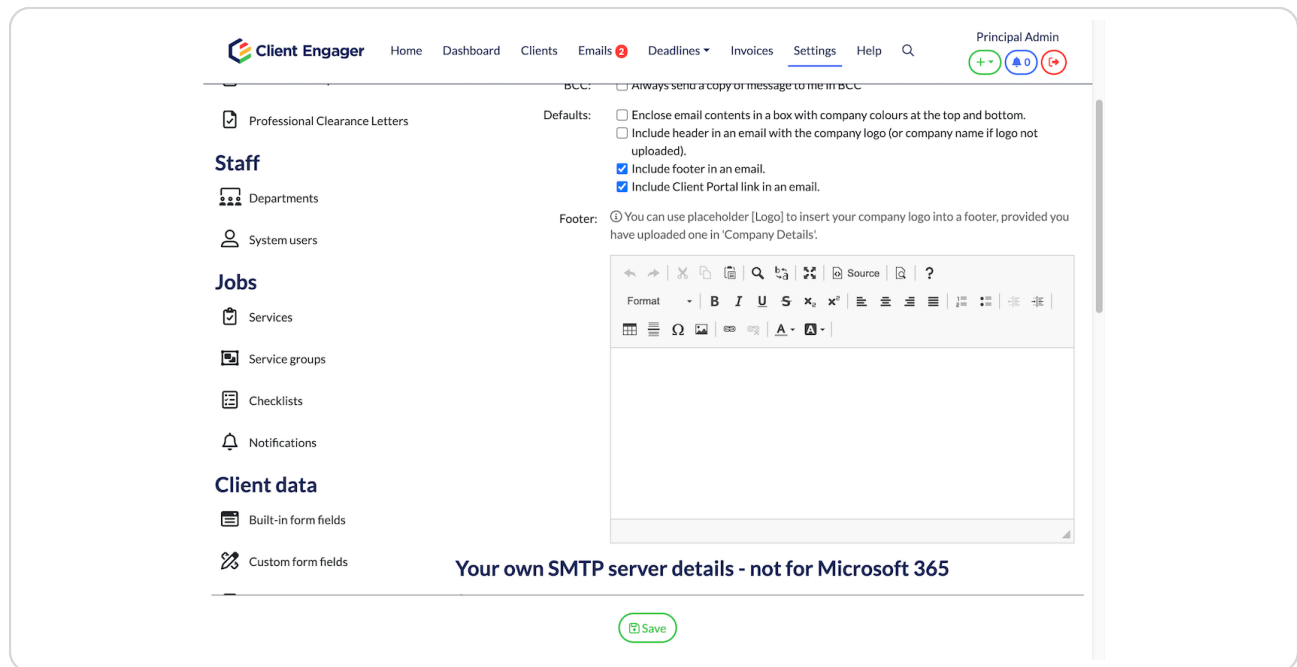
- ☒ Include Client Portal link in an email.

① 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



Client Engager Home Dashboard Clients Emails **Deadlines** Invoices **Settings** Help Principal Admin

BCC: ☐ Always send a copy or message to me in BCC

Staff

- Professional Clearance Letters
- Departments
- System users

Jobs

- Services
- Service groups
- Checklists
- Notifications

Client data

- Built-in form fields
- Custom form fields

Defaults:

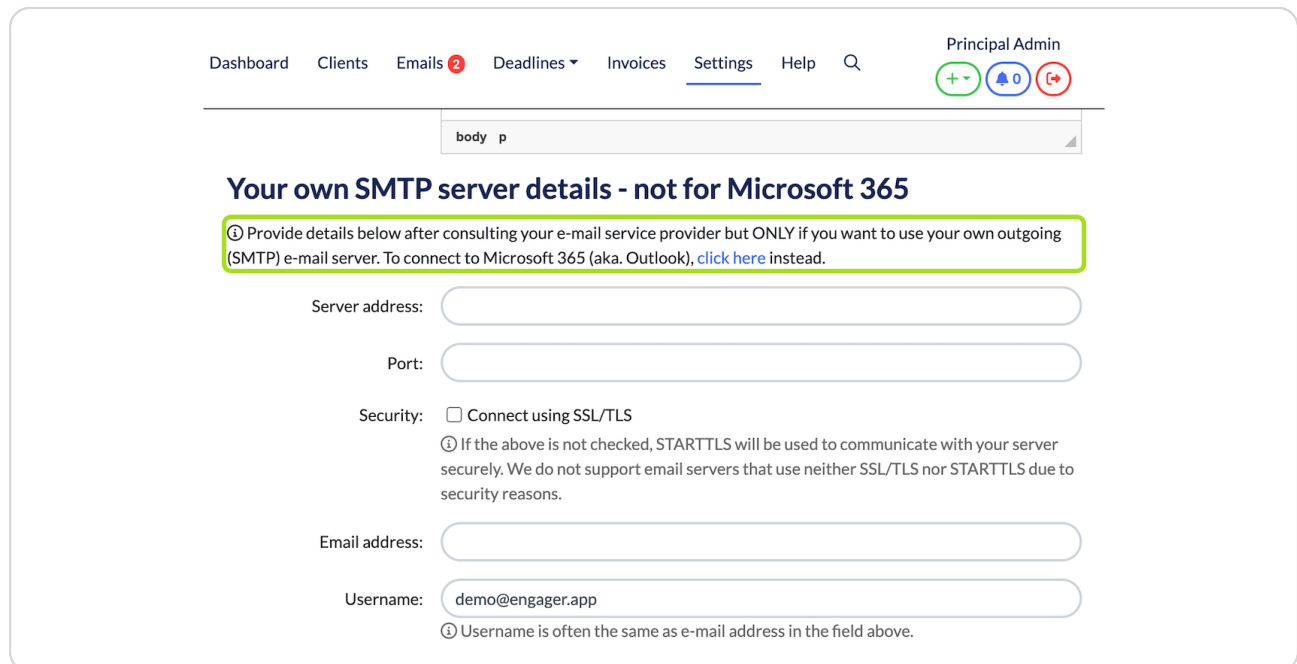
- ☐ Enclose email contents in a box with company colours at the top and bottom.
- ☐ Include header in an email with the company logo (or company name if logo not uploaded).
- ☒ Include footer in an email.
- ☒ Include Client Portal link in an email.

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

Your own SMTP server details - not for Microsoft 365

STEP 10

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



Dashboard Clients Emails **Deadlines** Invoices **Settings** Help Principal Admin

Your own SMTP server details - not for Microsoft 365

ⓘ 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.

Server address:

Port:

Security: ☐ Connect using SSL/TLS

ⓘ If the above is not checked, STARTTLS will be used to communicate with your server securely. We do not support email servers that use neither SSL/TLS nor STARTTLS due to security reasons.

Email address:

Username:

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

STEP 11

Click on Test server connection

: demo@engager.app

ⓘ 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.

: [Test server connection \(may take up to 30 seconds\)](#)

ⓘ Remember to save settings after testing the connection.

STEP 12

Click on Save

 Save

Tango

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