



How-To Instructions: Setup a New Email Account

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OVERVIEW AND REFERENCE POINTS ON FOCUSPOINT USER SETUP DOCUMENTATION SITE

- Overview of Discount by Customer Group in FocusPoint and what it looks like on the front end to a customer: <http://docs.focuspointsap.com/email-accounts>

1. HOW TO SETUP A NEW EMAIL ACCOUNT

- To add a new email account click Add new.

The screenshot shows a table titled "Email accounts" with the following columns: "Email address", "Email display name", "Is default email account", "Mark as default email account", and "Edit". There is one row of data with the email address "b2binfo@highwaytwo.com", display name "H2 B2B - Sales", and a checkmark in the "Is default email account" column. A green button labeled "Mark as default email account" is visible in the "Mark as default email account" column. The table includes pagination controls showing "1" of 1 items and a "Show 15 items" dropdown.

Email address	Email display name	Is default email account	Mark as default email account	Edit
b2binfo@highwaytwo.com	H2 B2B - Sales	✓	Mark as default email account	Edit

- The *Add a new email account* window is displayed:

The screenshot shows the "Add a new email account" form with the following fields and options:

- Email address: [Empty text field]
- Email display name: [Empty text field]
- Host: [Empty text field]
- Port: 25 (dropdown menu)
- User: lindsay.wickham@focuspointsap.com (text field)
- Password: [Masked text field]
- SSL:
- Use default credentials:

Buttons: Save, Save and Continue Edit

- Define the following email account information:
 - In the Email address field enter the from email address for all outgoing emails of your store. Example, sales@yourstore.com.
 - In the Email display name field, enter the displayed name for outgoing emails of your store. Example, "Your store sales department".

- In the Host field, enter the host name or IP address of your email server.
- In the Port field, enter the SMTP port of your email server.
- In the User field, enter the username of your email server.
- In the Password field, enter the password of your email server.
- Select the SSL checkbox, to use Security Sockets Layer to encrypt the SMTP connection.
- Select the Use default credentials checkbox, to use default credentials for the connection.
- Click Save. The window is expanded, as follows:

Edit email account details [back to email account list](#) Save Save and Continue Edit Delete

Email address [?](#)

Email display name [?](#)

Host [?](#)

Port [?](#)

User [?](#)

Password [?](#) Change password

SSL [?](#)

Use default credentials [?](#)

Send Test Email (save settings first by clicking "Save" button)

Send email to [?](#) Send test email

In the Send email to field, enter the email address for the test email and click Send test email.

2. HOW TO SEND A WELCOME EMAIL

Email accounts Add new

Email address	Email display name	Is default email account	Mark as default email account	Edit
no-reply@napc.ca	NAPC	<input checked="" type="checkbox"/>	Mark as default email account	Edit

1-1 of 1 items

- Click Edit
- Make sure the following is filled out properly:
Email Address, Host, Port, User, Password (this was probably already filled in but won't display in FocusPoint for security purposes) and make sure SSL is selected.

Edit email account details [back to email account list](#) Save Save and Continue Edit Delete

Email address ?	no-reply@napc.ca
Email display name ?	NAPC
Host ?	smtp.office365.com
Port ?	587
User ?	no-reply@napc.ca
Password ?	<input type="password"/> Change password
SSL ?	<input checked="" type="checkbox"/>
Use default credentials ?	<input type="checkbox"/>

Send Test Email (save settings first by clicking "Save" button)

Send email to ? Send test email

You can send a test email from this page also.

*For additional training please reach out to your Project Manager!