


## Enter SMTP Credentials

Simple Mail Transfer Protocol (SMTP) allows the boberdoo system to transmit emails.

However, boberdoo needs to be integrated to an email SMTP provider first.

 This is an essential setup for your system to function properly.

### Step 1

Go to the Settings tab and then select the Email Settings subtab.

### Step 2

Enter the username and password for the SMTP account.

### Step 3

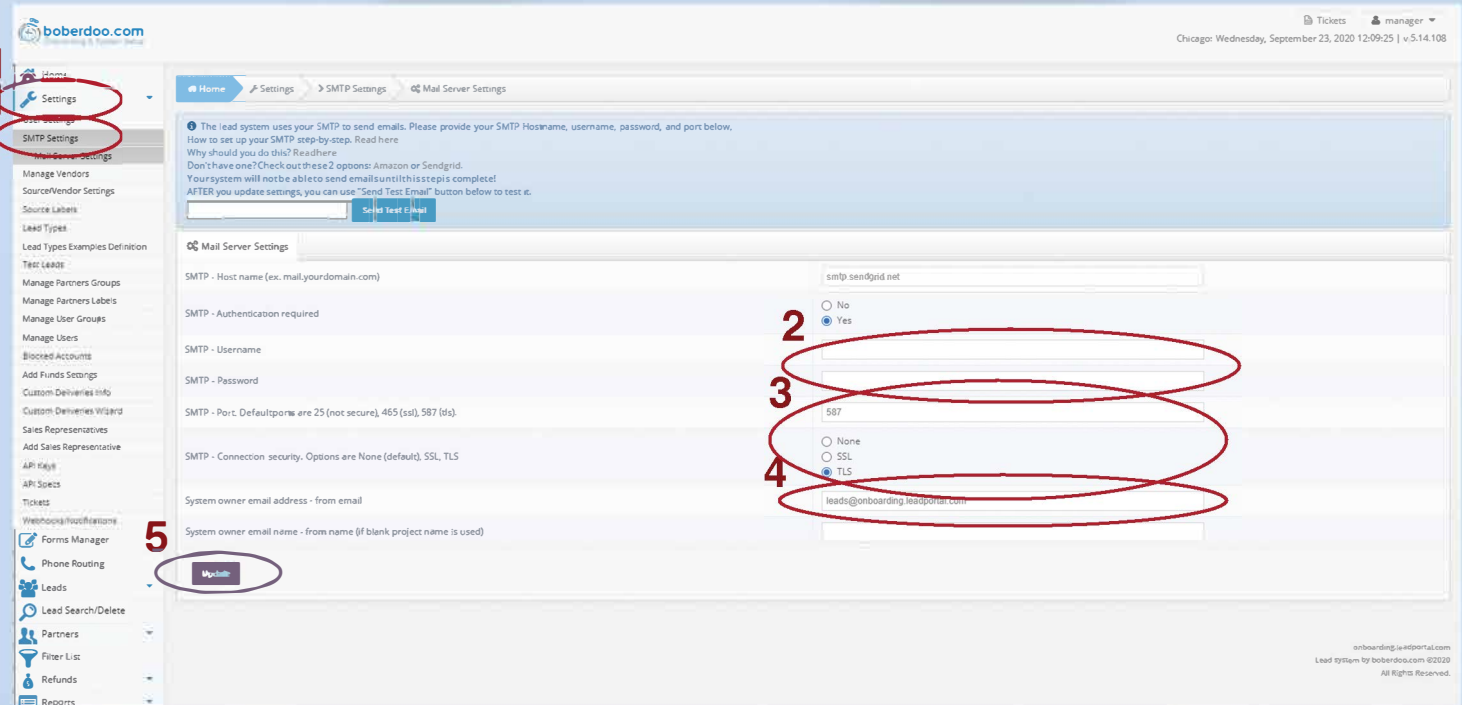
Enter the SMTP provider's specifications for "Ports" and "Connections Security" settings.

### Step 4

Enter preferred From Email.

### Step 5

Click "Update" to complete the update.




The screenshot shows the boberdoo.com interface with the following annotations:

- 1**: Points to the "Settings" tab in the top navigation bar.
- 2**: Points to the "SMTP Settings" subtab in the left sidebar.
- 3**: Points to the "SMTP - Username" input field.
- 4**: Points to the "SMTP - Password" input field.
- 5**: Points to the "Update" button at the bottom of the form.

The form fields include:

- SMTP - Host name (ex. mail.yourdomain.com): smtp.sendgrid.net
- SMTP - Authentication required: ☒ Yes
- SMTP - Username: [empty]
- SMTP - Password: [empty]
- SMTP - Port: Default ports are 25 (not secure), 465 (ssl), 587 (tls): 587
- SMTP - Connection security. Options are None (default), SSL, TLS: ☒ TLS
- System owner email address - from email: leads@onboarding.leadportal.com
- System owner email name - from name (if blank project name is used): [empty]

 Testing the settings is the only way to confirm the configuration is correct without causing errors with live leads. See next page for testing steps.

## Related Links



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Video



Support Page

## Testing

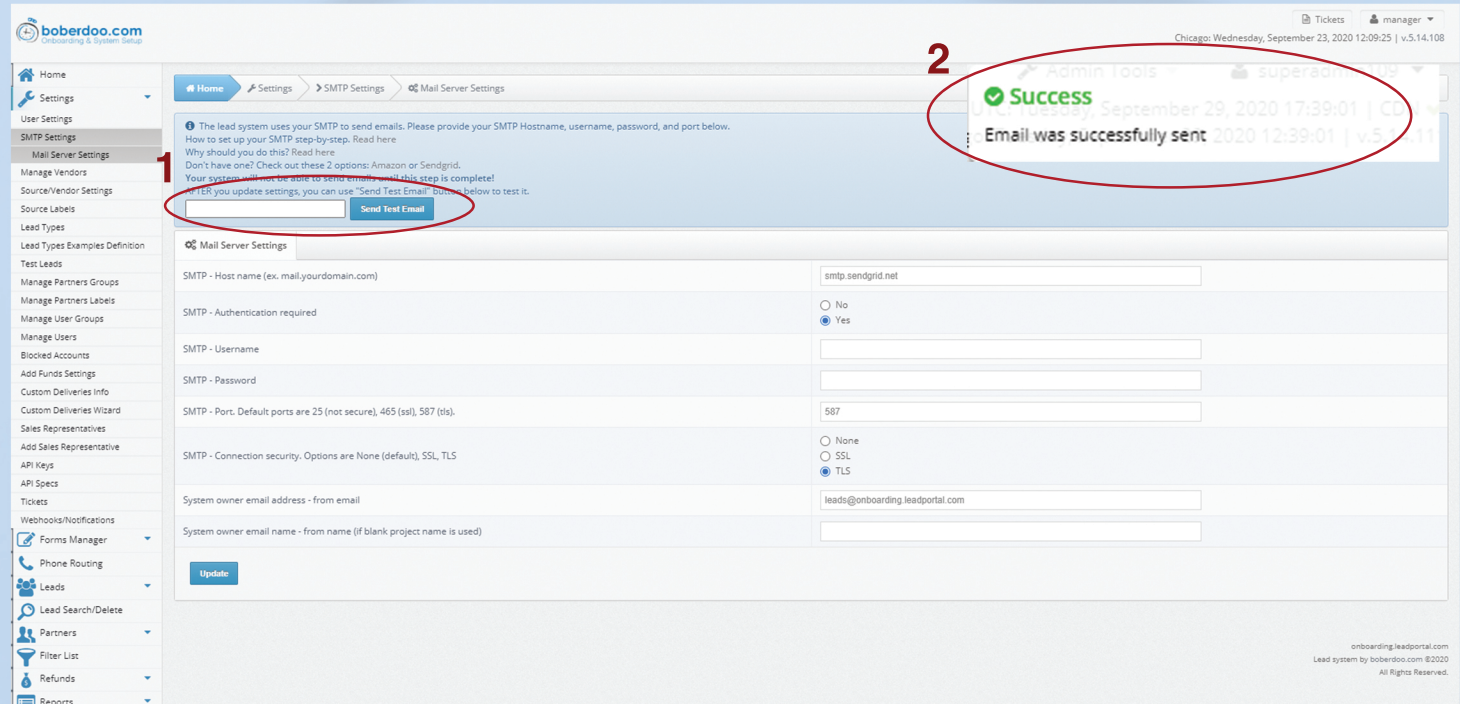
There is a simple test too to verify the SMTP settings are accurate.

### Step 1

Enter the email address where the test should be sent.

### Step 2

Confirm test is successful.



The screenshot shows the 'Mail Server Settings' page in the boberdoo.com interface. A red circle labeled '1' highlights the 'Send Test Email' button. Another red circle labeled '2' highlights a success message in the top right corner that reads 'Success Email was successfully sent 2020 12:39:01 | v.5.14.108'. The settings form includes fields for SMTP Host name (smtp.sendgrid.net), Authentication required (Yes), Username, Password, Port (587), Connection security (TLS), and System owner email address (leads@onboarding.leadportal.com).

## Related Links



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## Troubleshooting

There are two common questions clients typically have.

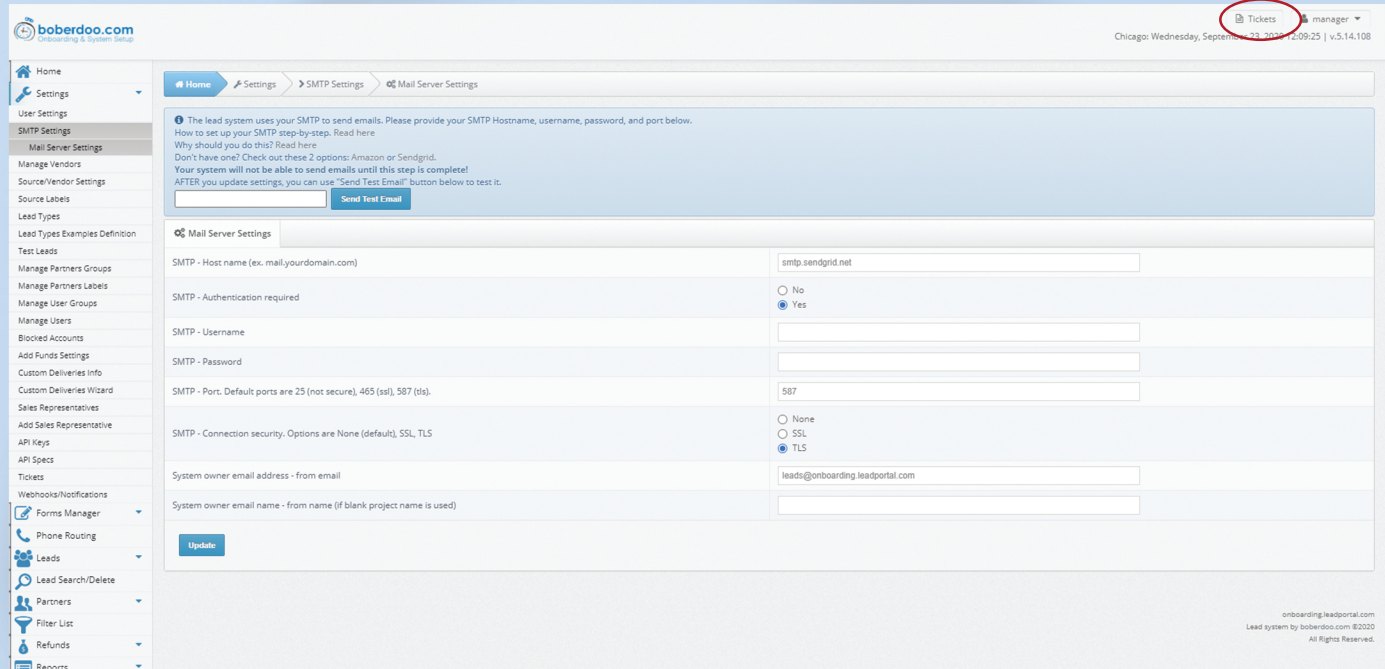
### Where Do I Get An SMTP Account?

**SendGrid:** This is a free, reliable service that is not too complex:

### Are Your Credentials Are Causing Errors?

\*If the test email is still getting an error after verifying settings, please send a Support Ticket to the boberdoo team for assistance.

In the ticket description, please provide the SMTP provider and details that will help the support team resolve the error.



The screenshot shows the 'Mail Server Settings' page in the boberdoo.com onboarding portal. The page has a sidebar with navigation links like Home, Settings, User Settings, SMTP Settings, Mail Server Settings, Manage Vendors, Source/Vendor Settings, Source Labels, Lead Types, Lead Types Examples Definition, Test Leads, Manage Partners Groups, Manage Partners Labels, Manage User Groups, Manage Users, Blocked Accounts, Add Funds Settings, Custom Deliveries Info, Custom Deliveries Wizard, Sales Representatives, Add Sales Representative, API Keys, API Spec, Tickets, Webhooks/Notifications, Forms Manager, Phone Routing, Leads, Lead Search/Delete, Partners, Filter List, Refunds, and Reports. The main content area is titled 'Mail Server Settings' and contains a 'Send Test Email' button. Below this, there are several input fields and radio buttons for configuring the SMTP settings. A red star icon and a circled 'Tickets' link are visible in the top right corner of the page.

Field	Value
SMTP - Host name (ex. mail.yourdomain.com)	smtp.sendgrid.net
SMTP - Authentication required	<input checked="" type="radio"/> Yes
SMTP - Username	
SMTP - Password	
SMTP - Port. Default ports are 25 (not secure), 465 (ssl), 587 (tls).	587
SMTP - Connection security. Options are None (default), SSL, TLS	<input checked="" type="radio"/> TLS
System owner email address - from email	leads@onboarding.leadportal.com
System owner email name - from name (if blank project name is used)	

[Update](#)

### Related Links



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Video



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