

# How to create an email account

Email Accounts are used when Print Director sends emails. An email will be sent for any of the following reasons:

- Right-click the user(s) in Resource Manager and choose Send Email. This is normally used for sending PIN numbers to users.
- Scheduled tasks that send Report Exports or Flat File Exports.
- Rule Violation notifications.

## Obtain the SMTP server settings required

If you have an open relay SMTP server on your network, then all you need is the SMTP server address. This can be the host name or an IP address.

If however, the SMTP server requires authentication and/or SSL/TLS, then these credentials along with the port number will be required.

## Example: Office 365 SMTP settings

- SMTP server address: smtp.office365.com
- 'From' address: must match the User ID.
- SMTP port number: 587
- Server requires SSL: Ticked.
- SMTP server requires authentication: Ticked.
- Enter the username and password for the Office 365 account that will be used for sending emails.

## Example: Gmail SMTP settings

- SMTP server address: smtp.gmail.com
- 'From' address: must match the User ID.
- SMTP port number: 587
- Server requires SSL: Ticked.
- SMTP server requires authentication: Ticked.
- Enter the username and password for the Google account that will be used for sending emails.

## Create the Email Account

1. Open Resource Manager.
2. Navigate to **Email Accounts**.
3. In the right hand pane, click **Add**.
4. Enter a descriptive name in the **Email account name** textbox.
5. Enter the **SMTP server address** in the textbox.
6. In the **'From' address for outgoing emails** textbox, type the email address from which the emails will be sent. Note that depending on the SMTP server's configuration, there may be rules in place that check the 'From' and either allow or deny the relay.
7. Enter the SMTP port number. Normally, if there is no authentication or SSL required, the port is 25. If SSL is required, it is normally 587. This will need to be supplied by the SMTP administrator.
8. If SSL or TLS is required, tick the **Server requires an encrypted connection** checkbox.
9. If authentication is required, tick the **SMTP server requires authentication** checkbox and enter the **User name** and **Password**.

10. Click **Test Settings** to test sending an email.
11. Click **OK**.

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