



Email Client Configuration Guide

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Email Configuration

This guide explains how to configure a few of your email programs to access your email account using the POP or IMAP protocol. The following topics are discussed:

- Process overview — this section is provided for novice users and includes a preparation checklist
- Email programs — this section is presented in alphabetical order and includes:
 - MAC OS.X Mail
 - MSOutlook Express
 - MSOffice Outlook 2007

- SMTP
- SMTP authentication
- Setting SMTP ports

If you have never set up an email account, it is strongly recommended that you read the Process overview before beginning.

If your particular email program is not covered in this guide, you can still use the Process overview to complete your account set up. Set up varies from program to program but not by very much. You can also check your email program's information web site for specific set up instructions or contact your internet provider for assistance if you have trouble sending outbound email..

Process Overview

You have an internet / email account and have decided you want to download your email messages to your computer. This requires two basic things:

1. That your computer can communicate properly with the provider's server.
2. That the provider's server can recognize you in order to retrieve the right email messages and deliver them to you.

If this sounds daunting, don't be alarmed. You need only fill in two fields in order to tell your computer how to communicate with the provider's server and then fill-in two more fields to identify yourself. Depending on your program, there may be a few more fields to fill in but not many.

You will also have to set your program to use SMTP authentication. This sounds technical but it is "turned on" with one click of the mouse.

Account set up wizards

Your email program has a component in it called a wizard. The wizard will guide you through the process of entering the information required to set up your email account. (If you have ever installed software on your computer, you have used a wizard: a series of windows which prompt you to either accept default information or provide information such as your name and the product license key.)

The wizard will allow you to back up screens and cancel the process at any point. Some program wizards will even allow you to complete the account set up without all the required information. Remember, though, you will have to add the missing information to the account at some point in order to retrieve and send email.

Anatomy of an email address

Your email address is made up of three parts.

<u>user name</u>	<u>domain</u>	<u>top-level domain</u>
johnsmith	@ netbox	. com

The first part is unique to you: it is your user name. It uniquely identifies you within your service provider's "domain".

Your user name is separated from the second part by the symbol (@). The second part is the domain or host name, netbox.

The domain name is separated from the third part by a period (.) commonly referred to as a "dot". The third part is called a top-level domain (TLD) and is simply a level of organization to break up the internet into manageable groupings within which to direct traffic (in our case, .com).

(If you are interested in how domain names work, go to http://en.wikipedia.org/wiki/Domain_name.)

Your email address is often synonymous with your login or user name. That is to say, you may identify yourself anywhere a password is required by typing your email address in a username field and your password in a password field. However, more often simply providing your username will suffice.

But there is an important exception so please keep reading.

Why is my email address important?

The reason we are taking the time to examine your email address is because you will need to use it as your user name when setting up your email client. If you do not enter your FULL email address as your user name, the server will return an error when you try to connect.

You may only be required to use your username to log in to the various services provided to you, but when setting up your email client you must enter your full email address as your username.

Account information

These are the four main pieces of information you will need to set up your new account.

Your user or login name	Please use your full email address.
Your password	Your password is likely assigned by your provider. You can usually change it later according to your ISP's policy.
incoming server	mail.netbox.com
outgoing server	mail.netbox.com

<<<<<<Your provider may have also indicated:>>>>>>

Server type or Email protocol	This is the protocol that the incoming server uses to deliver mail. The server type is either POP3 or IMAP.
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Your software may or may not require this information. It is usually requested in order for your client software to identify further options to offer you but we are not concerned with such settings here.

NetBox allows users to select either the familiar POP3 protocol, or the IMAP protocol. In both cases, the incoming server is the same, mail.netbox.com.

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The List

If your provider has not given you a hard copy or printable list of your account settings, you can fill-in the information in the following table in preparation for providing it to your software. While you set up your account, you'll want this information right in front of you.

Account name:	This is not given to you by your provider. This is simply an identifier for you to label the account you are setting up. You should use something that describes the nature of the account like your name or the function of the account (e.g. Home Office)
Your name (also called Display in Outlook):	Your name. Keep in mind the format you want to use as this will often populate the From field in your outgoing message.
User name (also called Login):	Your email address: user@netbox.com
Password:	Your password
Incoming Server:	The exact name of this server. mail.netbox.com
Outgoing Server:	The exact name of this sever. mail.netbox.com
Server Type or Email Protocol	POP3 (alternately referred to as POP in some software) or IMAP.

NOTE: If your provider has given you more information than the above table contains, write it down as well. However, please note that this guide only addresses basic account set up.

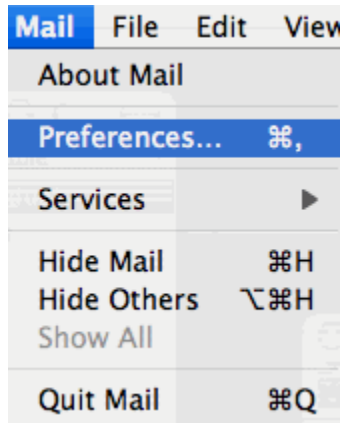
Email programs

This document addresses the set up of some of the more widely-used email programs. What follows is an alphabetical ordering of email clients and the basic steps required to set up an account.

Mail (Mac OS.X)

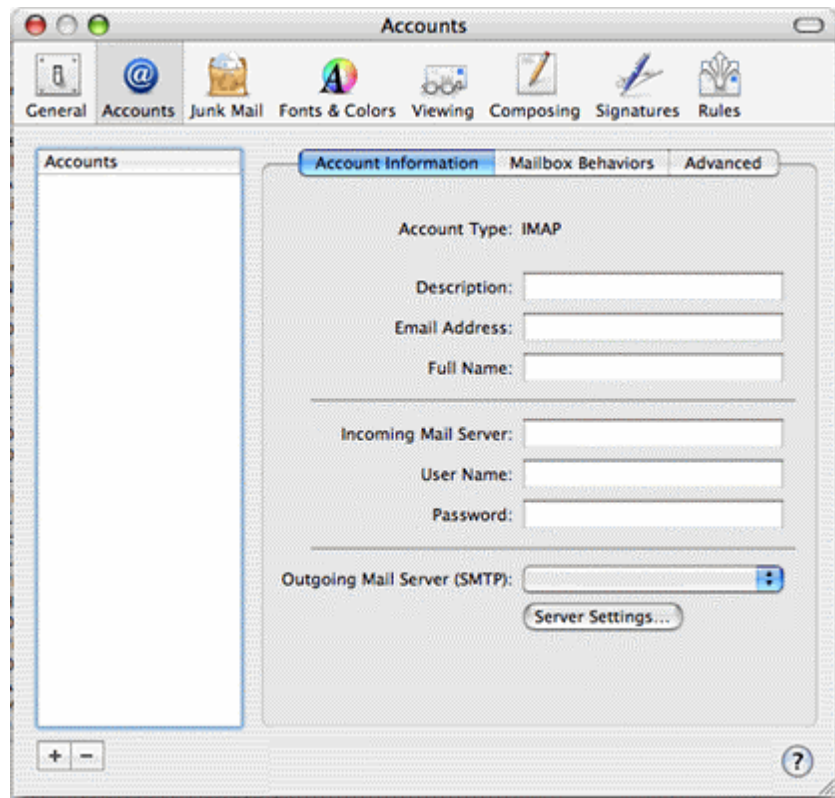
THE MAIL WIZARD MAY ATTEMPT TO VERIFY THE SETTINGS YOU ENTER DURING THE SET UP PROCESS. PLEASE MAKE SURE YOUR COMPUTER IS CONNECTED TO THE INTERNET DURING THIS PROCESS.

1. Open Mail.



Click the **Mail** menu and select **Preferences**.

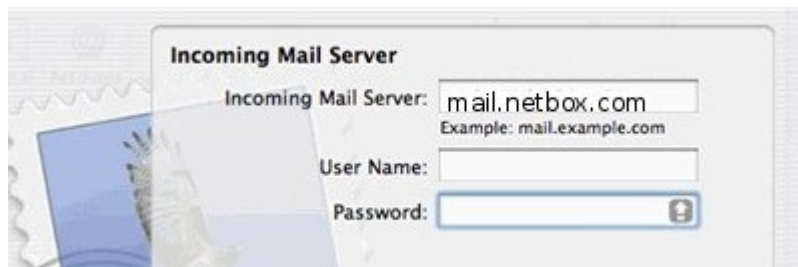
2. Click the **+** button in the bottom left corner to add an account.



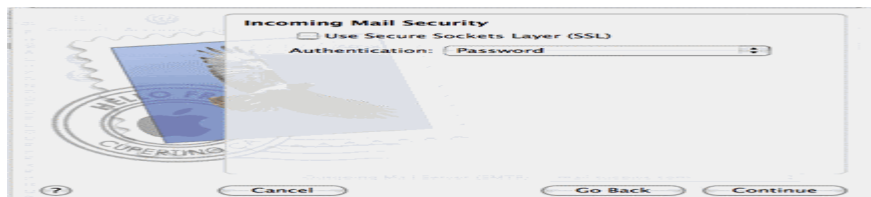
3. Provide the following information:
 - a. Select the **Account Type:** IMAP or POP.
 - b. Type a name or description for your account in the **Account Description** field.
 - c. Type your name in the **Full Name** field.
 - d. Type the email address given to you by your provider in the **Email Address** field.



4. Click **Continue**.
5. Provide the following information:
 - a. Type the name of the incoming server given to you by your provider in the **Incoming Mail Server** field.
 - b. Type the user or account name given to you by your provider in the **User Name** field. (Remember, this is your full email address.)
 - c. Type the password given to you by your provider in the **Password** field.

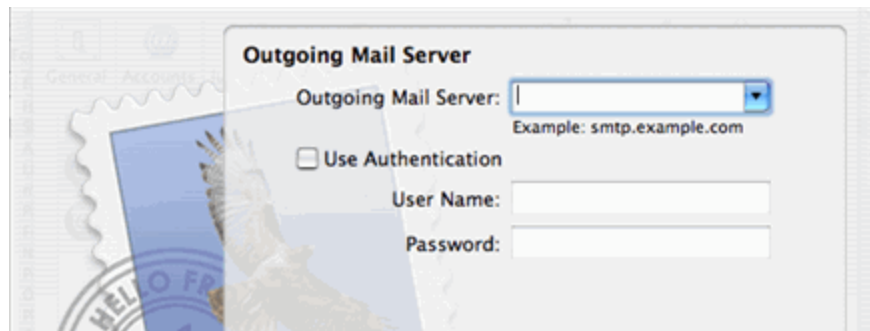


6. Click **Continue**.
7. For **Authentication**, select Password.



8. Click **Continue**.

9. Type the name of the outgoing server given to you by your provider in the **Outgoing Mail Server** field.
 - a. Click on the **Use Authentication** checkbox to select it.
 - b. Type the user or account name given to you by your provider in the **User Name** field. (Remember, this is your full email address.)
 - c. Type the password given to you by your provider in the **Password** field.



10. Click **Continue**.

11. Click **Continue** again.

You should now be able to send and receive mail.

Note: If Mail is unable to communicate with the outgoing server, see “Error: Reference source not found” or contact your provider for assistance.

Outlook 2007 (MS Office)

YOU CAN USE THE FOLLOWING PROCEDURE TO CONFIGURE ANY VERSION OF OUTLOOK. THE 2007 SCREENS ARE GRAPHICALLY DIFFERENT FROM PREVIOUS VERSIONS BUT THE REQUIRED INFORMATION IS THE SAME. OLDER VERSIONS OF OUTLOOK WILL USE MULTIPLE SCREENS AND STEPS TO CAPTURE INFORMATION CONTAINED IN STEP 5.

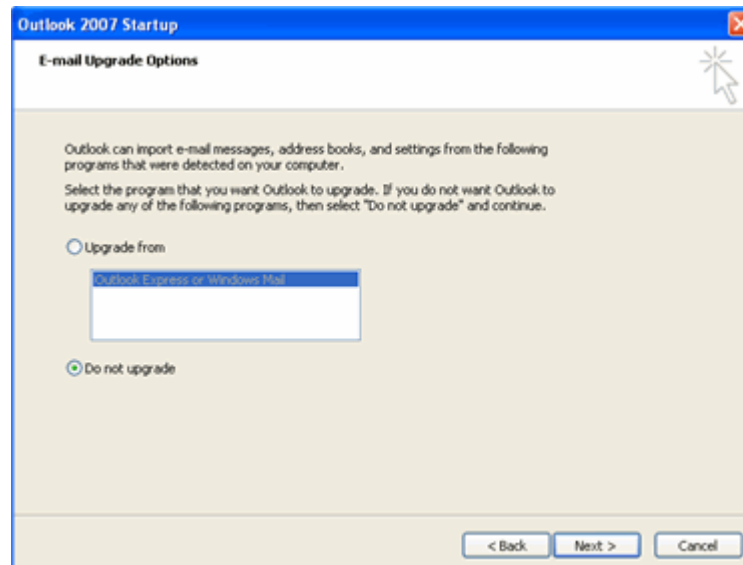
1. Open Outlook.

If there are no accounts currently configured in Outlook, the Wizard will launch.

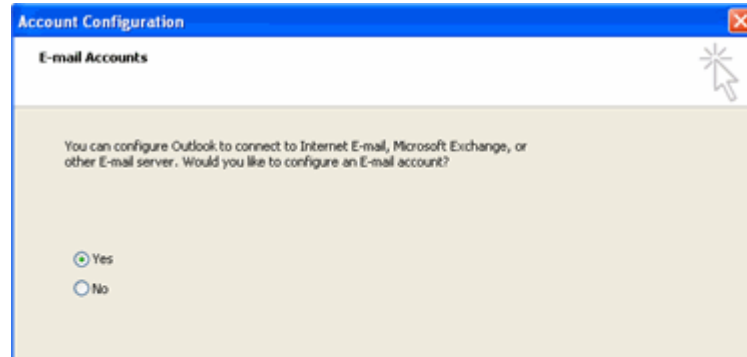


Click **Next**.

If you have another mail client on your computer, this window may open:

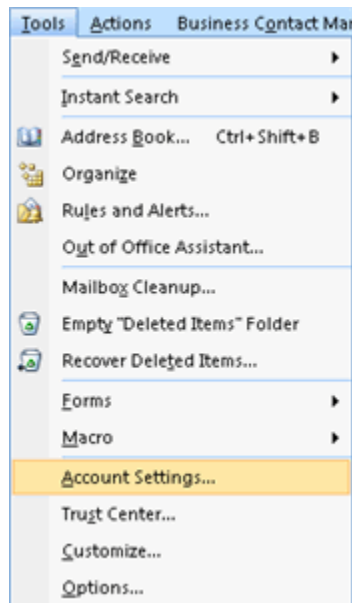


This guide does not cover importing settings. Select **Do not upgrade** and click **Next**.

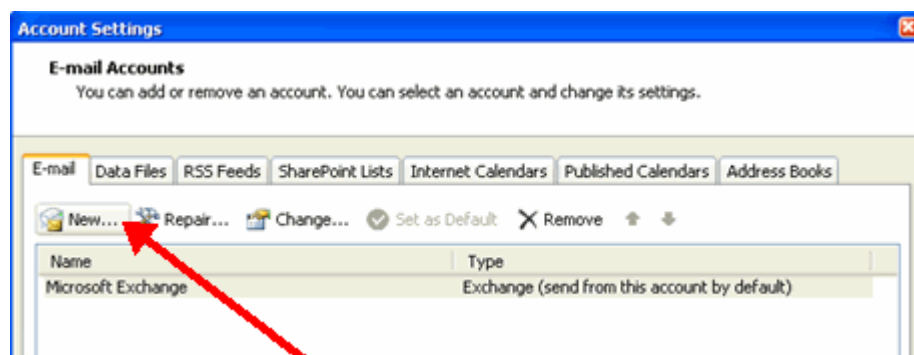


Select **Yes** and click **Next**.

Alternatively, you can open the Add Account Wizard by clicking the **Tools** menu and select the **Account Settings** option. (Older versions: **Accounts** option.)

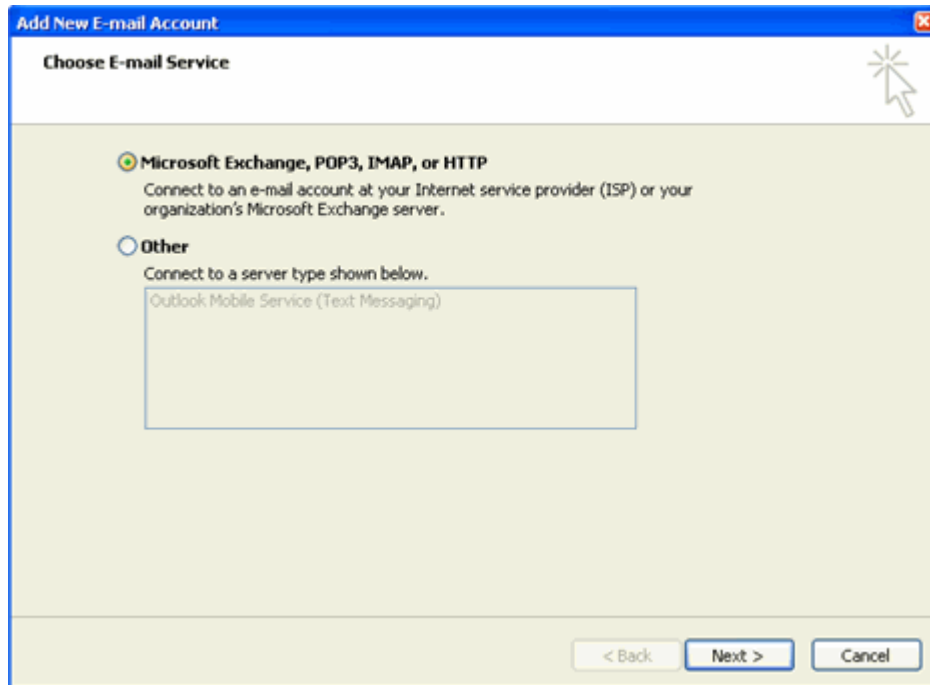


The Account Settings window opens with the E-mail tab showing:



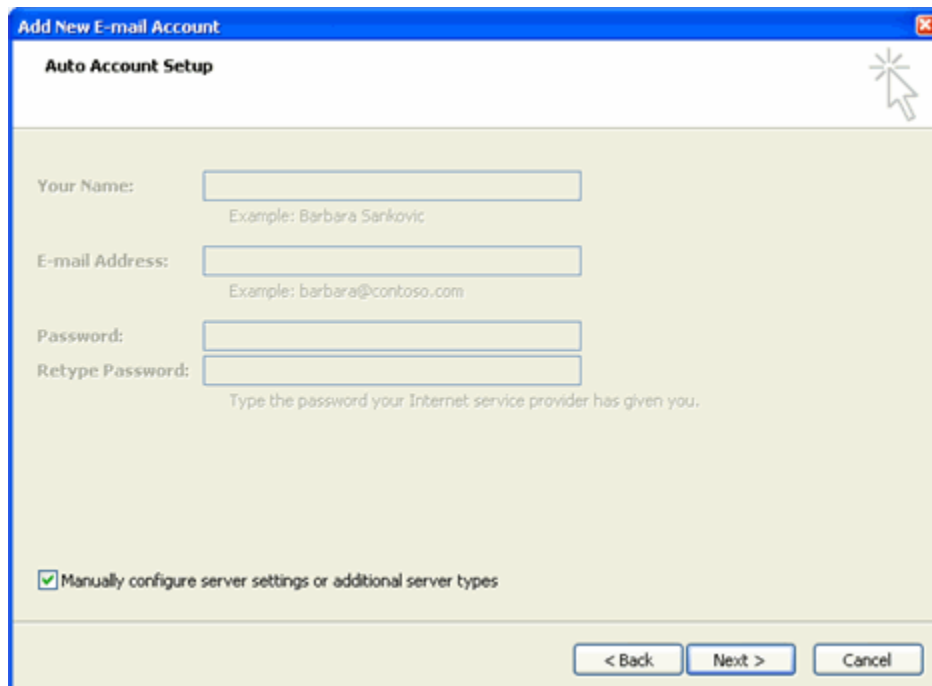
Click the **New** button. (Older versions: Mail tab and **Add** button. Select mail and skip to Step 5.)

2. Click the **Microsoft Exchange, POP3, IMAP, or HTTP** option and click **Next**.



The screenshot shows the 'Add New E-mail Account' dialog box with the title bar 'Add New E-mail Account' and a close button. The main heading is 'Choose E-mail Service'. There are two radio button options: 'Microsoft Exchange, POP3, IMAP, or HTTP' (which is selected) and 'Other'. Below the 'Other' option is a text box containing 'Outlook Mobile Service (Text Messaging)'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

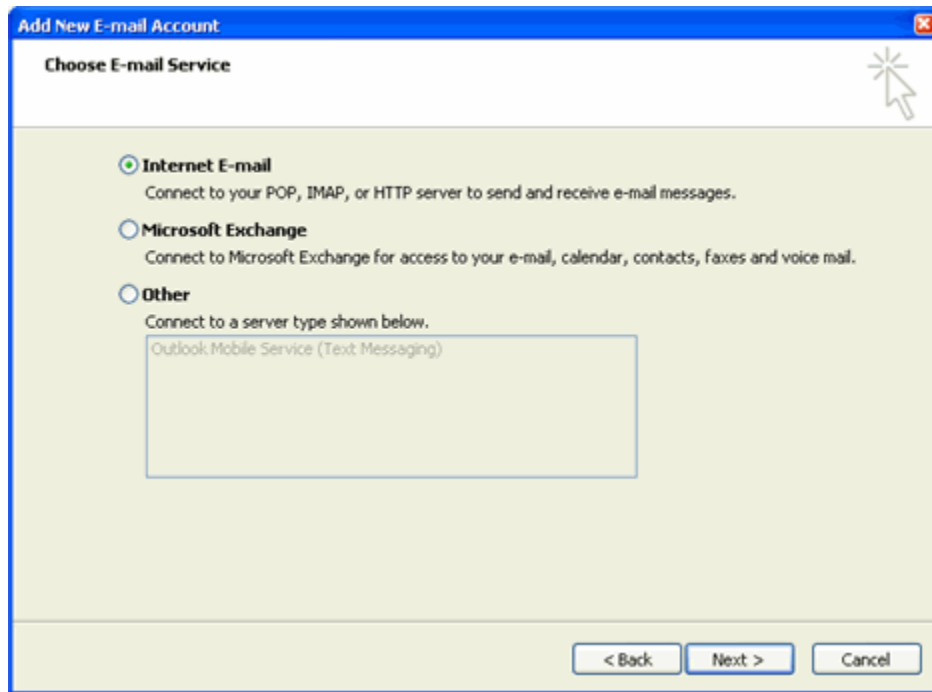
3. Click the **Manually configure server setting or additional server types** checkbox and click **Next**.



The screenshot shows the 'Add New E-mail Account' dialog box with the title bar 'Add New E-mail Account' and a close button. The main heading is 'Auto Account Setup'. There are four text input fields: 'Your Name:' (with example 'Barbara Sankovic'), 'E-mail Address:' (with example 'barbara@contoso.com'), 'Password:', and 'Retype Password:' (with instruction 'Type the password your Internet service provider has given you.'). At the bottom left, there is a checked checkbox labeled 'Manually configure server settings or additional server types'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Note This guide does not cover the Auto Account Setup function.

4. Click the **Internet E-mail** option and click **Next**.



5. Provide the following information:
 - a. Type your name in the **Your Name** field. (This is the **Display Name** field in older versions.)
 - b. Type the email address given to you by your provider in the **E-mail Address** field.
 - c. From the **Account Type** dropdown, select POP3 or IMAP.
 - d. Type the address of the incoming mail server that your provider gave you in the **Incoming mail server** field.
 - e. Type the address of the outgoing mail server that your provider gave you in the **Outgoing mail server (SMTP)** field.
 - f. Type the user name given to you by your provider in the **User Name** field. (Remember, this is your full email address.)
 - g. Type the password given to you by your provider in the **Password** field.
 - h. Click the **Remember password** checkbox to select this option.

Add New E-mail Account

Internet E-mail Settings
Each of these settings are required to get your e-mail account working.

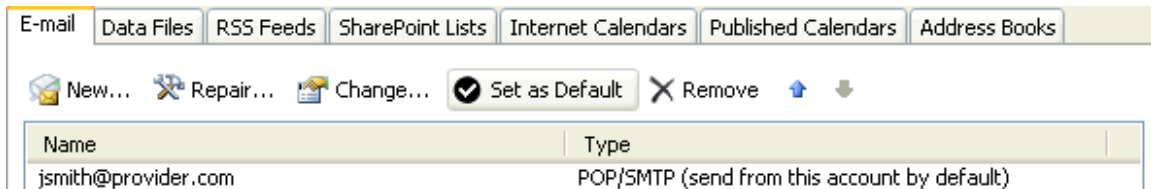
<p>User Information</p> <p>Your Name: <input type="text" value="John Smith"/></p> <p>E-mail Address: <input type="text" value="jsmith@netbox.com"/></p> <p>Server Information</p> <p>Account Type: <input type="text" value="POP3"/></p> <p>Incoming mail server: <input type="text" value="mail.netbox.com"/></p> <p>Outgoing mail server (SMTP): <input type="text" value="mail.netbox.com"/></p> <p>Logon Information</p> <p>User Name: <input type="text" value="jsmith@netbox.com"/></p> <p>Password: <input type="password" value="*****"/></p> <p><input checked="" type="checkbox"/> Remember password</p> <p><input type="checkbox"/> Require logon using Secure Password Authentication (SPA)</p>	<p>Test Account Settings</p> <p>After filling out the information on this screen we recommend you test your account by clicking the button below. (Requires network connection)</p> <p><input type="button" value="Test Account Settings ..."/></p>
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6. Click the **More Settings** button.
The Internet E-mail Settings window opens.
 7. Click the **Outgoing Server** tab.
 8. Ensure the **My outgoing server (SMTP) requires authentication** checkbox is selected. If not, click it.
 9. Ensure the **Use same settings as my incoming server** is selected. If it is not, click on it to select it.
 10. Click **OK**.
 11. Click **Test Account Settings** to validate the information you entered in this window.
- Note** If the test fails, double-check the information you input. If it is correct, try the test again. If an SMTP or outgoing server error is returned, see SMTP authentication. Otherwise, contact your provider for assistance.
12. Click **Next**.

13. Older versions only: select a connection method.
- a. Connect using my phone line if you dial-up your provider.
 - b. Connect using my local area network (LAN) for all other methods.
14. Click **Finish**. You are returned to the Account Settings window.

Note If you have multiple accounts configured in Outlook 2007, you want to set this or another account as the default account. Continue with the following steps to set a default account.

- a. Click on the account you want to set as the default account.
- b. Click the **Set as Default** button.

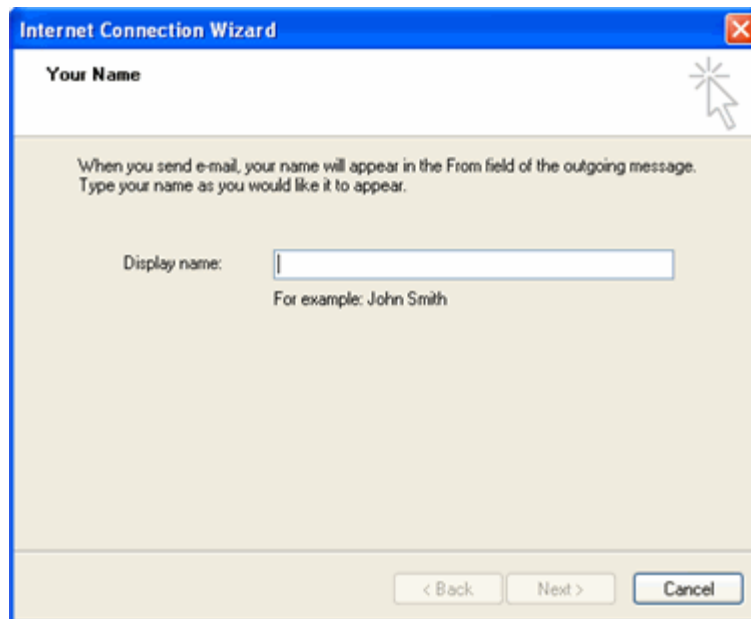


15. Click **Close**.

Outlook Express

THIS PROCEDURE CAN BE USED TO CONFIGURE ALL O/S VERSIONS OF EXPRESS.

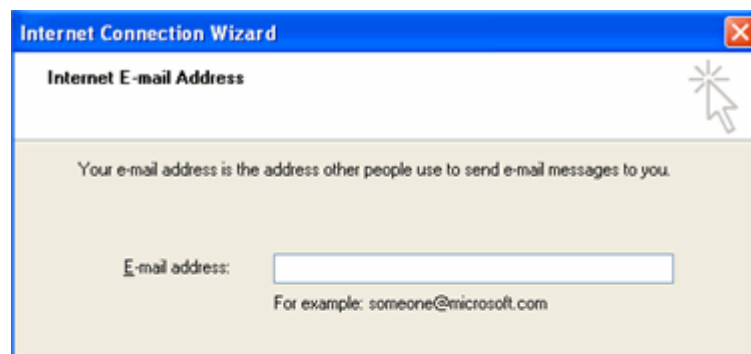
1. Open Outlook Express
and
click the **Tools** menu and select the **Accounts** option
or
click the Set up a Mail account link in the splash screen if it is available.
2. Type your name in the **Display name** field and click **Next**.



The screenshot shows the 'Your Name' step of the Internet Connection Wizard. The window title is 'Internet Connection Wizard'. The main heading is 'Your Name'. Below the heading, there is a text box for the display name. The text inside the text box is empty. Below the text box, there is a small example: 'For example: John Smith'. At the bottom of the window, there are three buttons: '< Back', 'Next >', and 'Cancel'. A mouse cursor is pointing at the 'Next >' button.

Note Display name is the name that will populate the From field in your outgoing mail.

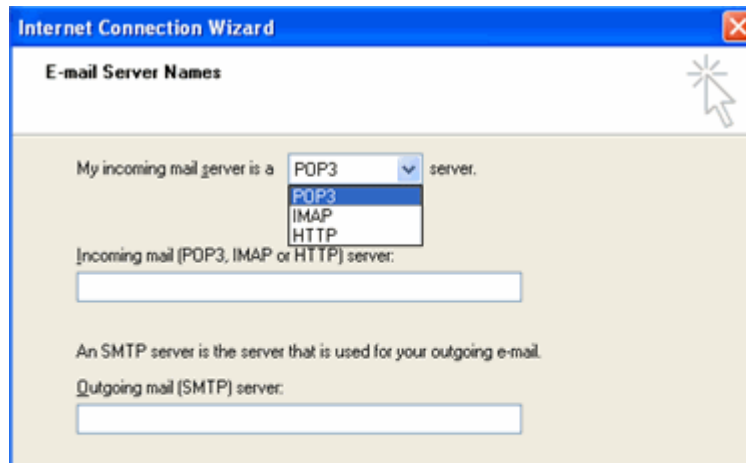
3. Type in the email address given to you by your provider in the **E-mail Address** field and click **Next**.



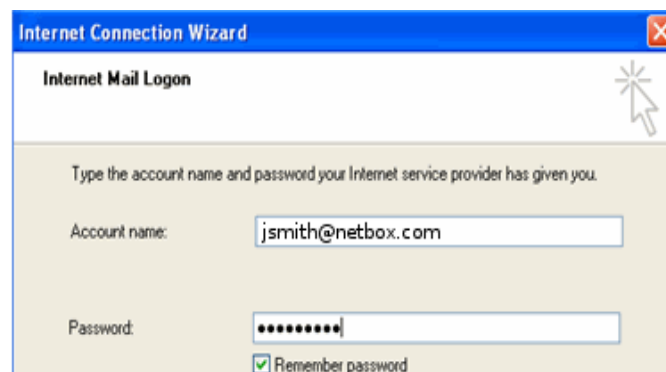
The screenshot shows the 'Internet E-mail Address' step of the Internet Connection Wizard. The window title is 'Internet Connection Wizard'. The main heading is 'Internet E-mail Address'. Below the heading, there is a text box for the email address. The text inside the text box is empty. Below the text box, there is a small example: 'For example: someone@microsoft.com'. At the bottom of the window, there are three buttons: '< Back', 'Next >', and 'Cancel'. A mouse cursor is pointing at the 'Next >' button.

4. Select POP3 or IMAP from the **My incoming mail server is a** dropdown list.

- a. Type the incoming server name given to you by your provider in the **Incoming mail (POP3, IMAP or HTTP) server** field.
- b. Type the outgoing server name given to you by your provider in the **Outgoing mail (SMTP) server** field.
- c. Click **Next**.



5. Provide the following information:
 - a. Type your user or account name given to you by your provider in the **Account name** field. (Remember, this is your full email address.)
 - b. Type the password given to you by your provider in the **Password** field.
 - c. Ensure that the **Remember password** checkbox is selected.
 - d. Click **Next**.



6. Click **Finish**.
Now you need to ensure that SMTP authentication is turned on.
7. Click the **Tools** menu and select **Accounts**.
8. Click the **Mail** tab and highlight the account you just setup.
9. Click the **Properties** button.
10. Click the **Servers** tab.
11. Go to the **Outgoing Mail Server** section at the bottom.

12. Click the **My server requires authentication** checkbox.
13. Click the **Settings** button.
14. Make sure the **Use same settings as my incoming mail server** option is selected. If it is not, click on it.
15. Click **OK**.
16. **Click Apply**.
17. Click **OK**.
18. **Click Close**.

You should now be able to send and receive mail.

Note If an SMTP or outgoing server error is returned when you try to download your mail, see SMTP authentication . Otherwise, contact your provider for assistance.

Note If an SMTP or outgoing server error is returned when you try to download your mail, see “ SMTP authentication” . Otherwise, contact your provider for assistance.

SMTP

Some comments are required about sending outbound messages and the SMTP settings in client email programs. Simple Mail Transfer Protocol (SMTP) is the method used to send your email.

Many Internet Service Provider's (ISP's) Require that all outbound mail sent over their network MUST use the ISP's SMTP server exclusively. Sometimes the actual SMTP port used for sending mail through the ISP's server may be changed. These measures are used as security and spam-control techniques.

Netbox allows users to send mail directly through the Netbox SMTP server (mail.netbox.com - using standard default port address 25) but only if your ISP provides that capability.

If you find you cannot send mail there are two things you can check:

- SMTP authentication
- SMTP ports

SMTP authentication

SMTP authentication simply means that your email client needs to pass your user name and password to the outbound SMTP mail server in order to send mail. Your ISP will provide the outbound email server name that you should enter along with any other data needed.

Mail (Mac OS.X)

Mail's SMTP authentication can be set during account creation. If you followed the steps in this guide you should have turned SMTP authentication on.

1. Click the **Mail** menu and select **Preferences**.
2. Click **Accounts** in the menu bar.
3. Ensure the **Account Information** tab is selected. If not, click on it.
4. Click the **Server Settings** button.
5. Click the **Authentication** dropdown and select "Password".
6. Type your user name in the **User Name** field. (Remember, this is your full email address.)
7. Type your password in the **Password** field.
8. Click **OK**.
9. Close the Accounts window.

MSOffice Outlook 2007

1. Click the **Tools** menu and select **Account Settings**.
2. Double-click the account for which you want to edit the SMTP settings. The Change E-mail Account window opens.
3. Click **More Settings**.
4. Click the **Outgoing Server** tab.

5. Click the **My outgoing server (SMTP) requires authentication** checkbox.
6. Ensure the **Use same settings as my incoming server** option is selected if your ISP allows this. Otherwise, use the name and settings from your ISP.
7. Click **OK**, then **Next**, then **Finish**, and finally **Close**.

MSOUTLOOK EXPRESS

1. Click the **Tools** menu and select **Accounts**.
2. Click the **Mail** tab and highlight the account for which you want to edit the SMTP settings.
3. Click the **Properties** button.
4. Click the **Servers** tab.
5. Go to the **Outgoing Mail Server** section at the bottom.
6. Click the **My server requires authentication** checkbox.
7. Click the **Settings** button.
8. Make sure the **Use same settings as my incoming mail server** option is selected if your ISP allows this. Otherwise, use the name and settings from your ISP.
9. Click **OK**.
10. **Click Apply**.
11. Click **OK**.
12. **Click Close**.
1. Click the **Tool** menu and select **Account Settings**.
2. Select **Outgoing Server (SMTP)** in the directory tree.
- 3.

Setting or Changing SMTP ports

SMTP uses default server port 25 to do send outbound messages. Some service providers block port 25 for security reasons.

If you experience problems with your outgoing mail while trying to configure your account, you can try switching the SMTP port setting to 587 or 8025. Alternately, try the settings from your ISP and/or mobile service provider.

NOTE – If you travel with a laptop, you may want to either note these ports or choose to set them as your SMTP port in order to avoid connectivity problems when routing your computer through other servers that might block port 25.

Mail (Mac OS.X)

1. Click the **Mail** menu and select **Preferences**.
2. Click **Accounts** in the menu bar.
3. Ensure the **Account Information** tab is selected. If not, click on it.
4. Click the **Server Settings** button.
5. Type "587" in the **Server Port** field.

6. Click **OK**.
7. Close the Accounts window.
8. Try sending your mail.

Note If you still cannot send mail, repeat these steps substituting 8025 for the SMTP port. If this does not solve your problem, contact your ISP provider for assistance.

MSOFFICE OUTLOOK 2007

1. Click the **Tools** menu and select **Account Settings**.
2. Double-click the account for which you want to edit the SMTP settings.
3. The Change E-mail Account window opens.
4. Click **More Settings**.
5. Click the **Advanced** tab.
6. In the **Outgoing mail (SMTP) field**, type 587.
7. Click **OK**, then **Next**, then **Finish**, and finally **Close**.
8. Try sending your mail.

Note If you still cannot send mail, repeat these steps substituting 8025 for the SMTP port. If this does not solve your problem, contact your ISP provider for assistance.