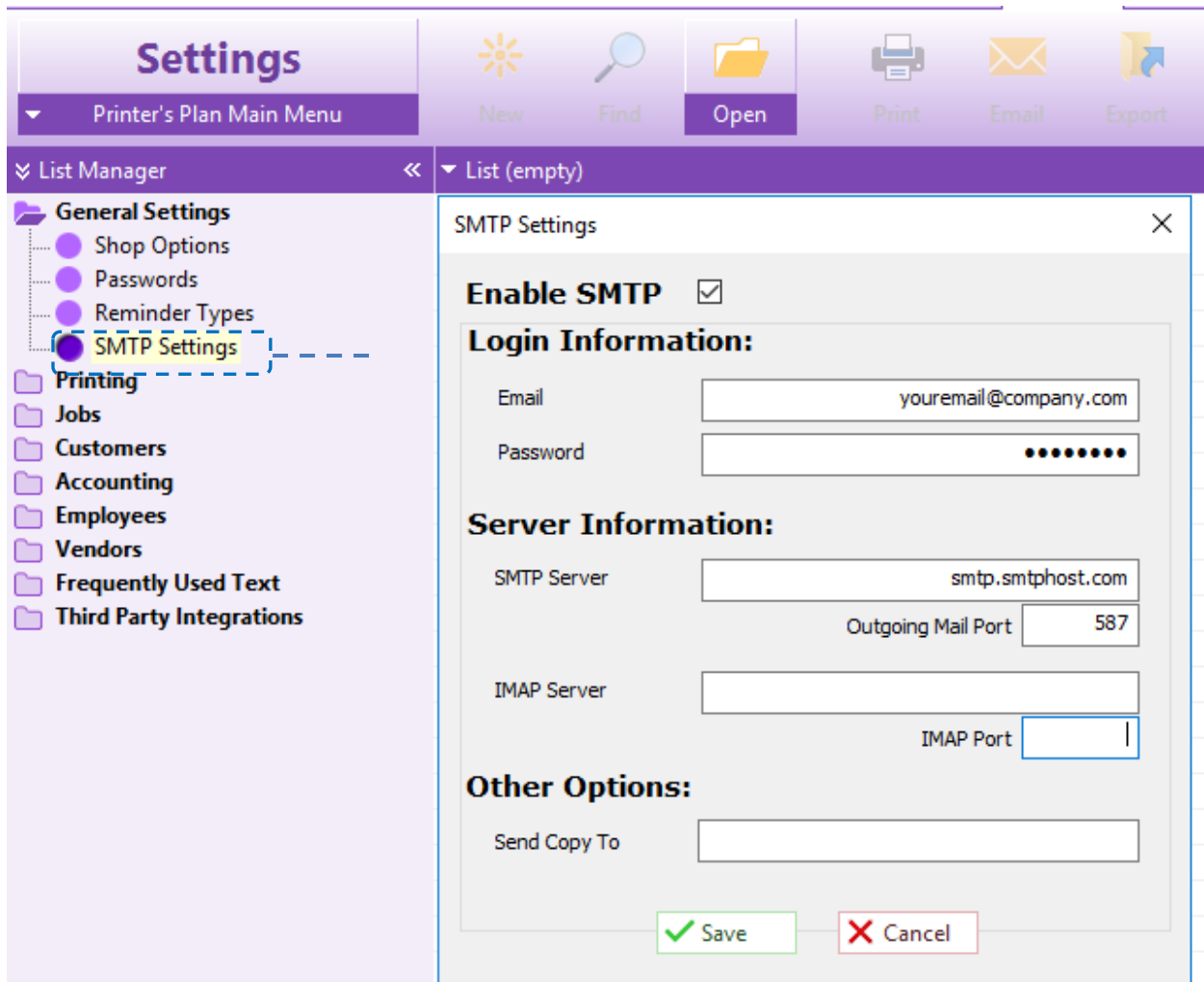


# SMTP Client Guide

To enable the Printer's Plan SMTP client go to the **Settings** tab, open the **General Settings** folder and select **SMTP Settings**.



To use the Printer's Plan SMTP email client, in this SMTP Settings window you will need to enter your email account information. Check with your email hosting provider to get the information to fill in these fields. The settings in this window are computer specific, each computer that runs Printer's Plan can use different email settings.

## Enable SMTP:

Check-in the **Enable SMTP** option. This option has to be enabled to use the Printer's Plan SMTP client. If this option is not checked, Printer's Plan will use the computer's default email client.

## Login Information:

In the **Email** field enter your email address.

In the **Password field** enter the password associated with your email account.

# SMTP Client Guide

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## Server Information:

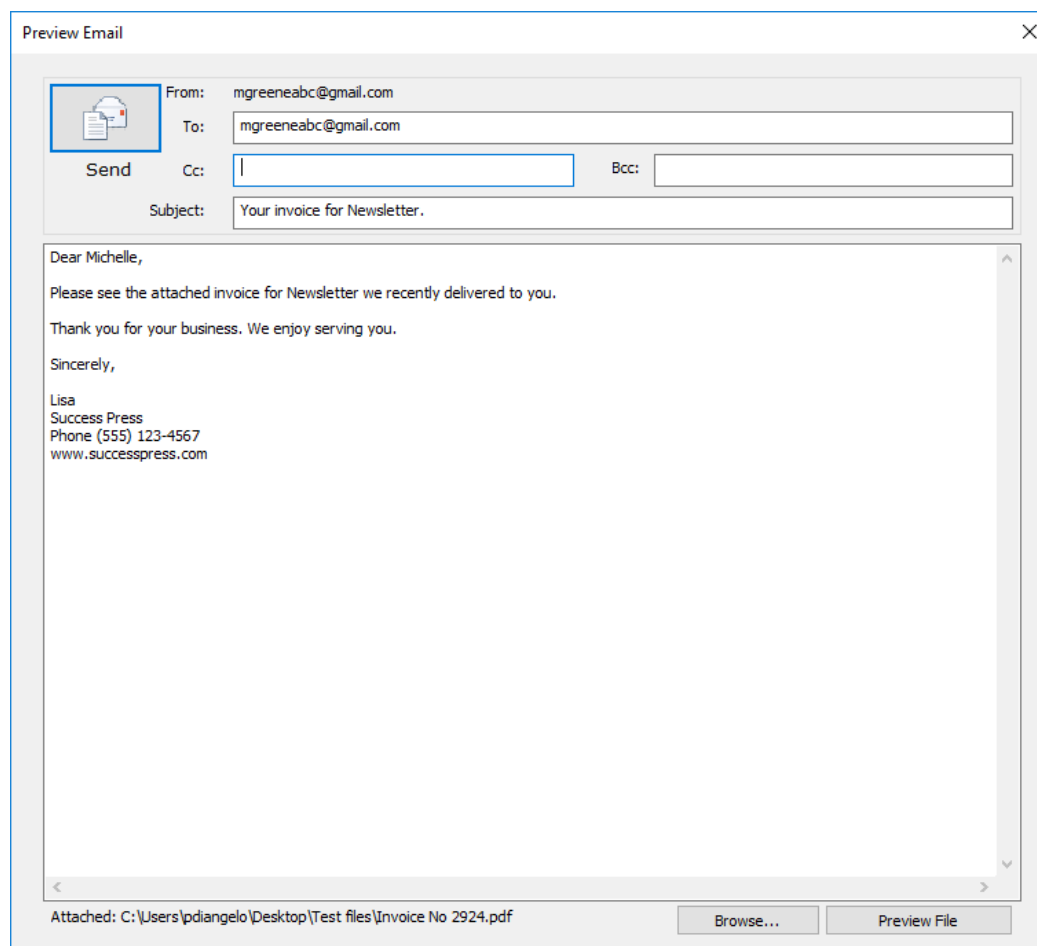
In the **SMTP Server** field enter the address of your email server and enter the **Outgoing Mail Port** number.

To save emails sent from Printer's Plan to your **Sent Items** folder, some email hosting providers require that you enter an **IMAP Server** address and **IMAP Port** number.

## Other Options:

Printer's Plan can automatically send a copy of the email to a specific address. To enable this option, enter the address in the **Send Copy To** field.

When you generate an email message from Printer's Plan the following **Preview Email** will open:



The screenshot shows a 'Preview Email' window with the following fields and content:

- From:** mgreeneabc@gmail.com
- To:** mgreeneabc@gmail.com
- Cc:** [Empty field]
- Bcc:** [Empty field]
- Subject:** Your invoice for Newsletter.
- Text:**

Dear Michelle,  
Please see the attached invoice for Newsletter we recently delivered to you.  
Thank you for your business. We enjoy serving you.  
Sincerely,  
Lisa  
Success Press  
Phone (555) 123-4567  
www.successpress.com
- Attached:** C:\Users\pdangelo\Desktop\Test files\Invoice No 2924.pdf
- Buttons:** Browse..., Preview File

In this window you can edit/update the information in the **To:**, **Cc:**, **Bcc:**, **Subject** and **Text** fields. If you are sending to more than one email address enter a comma to separate these addresses.

If there is a file attached to the email, the path of the file is listed at the bottom of the screen. If you click the **Preview File** button the attached file will be opened on the computer.

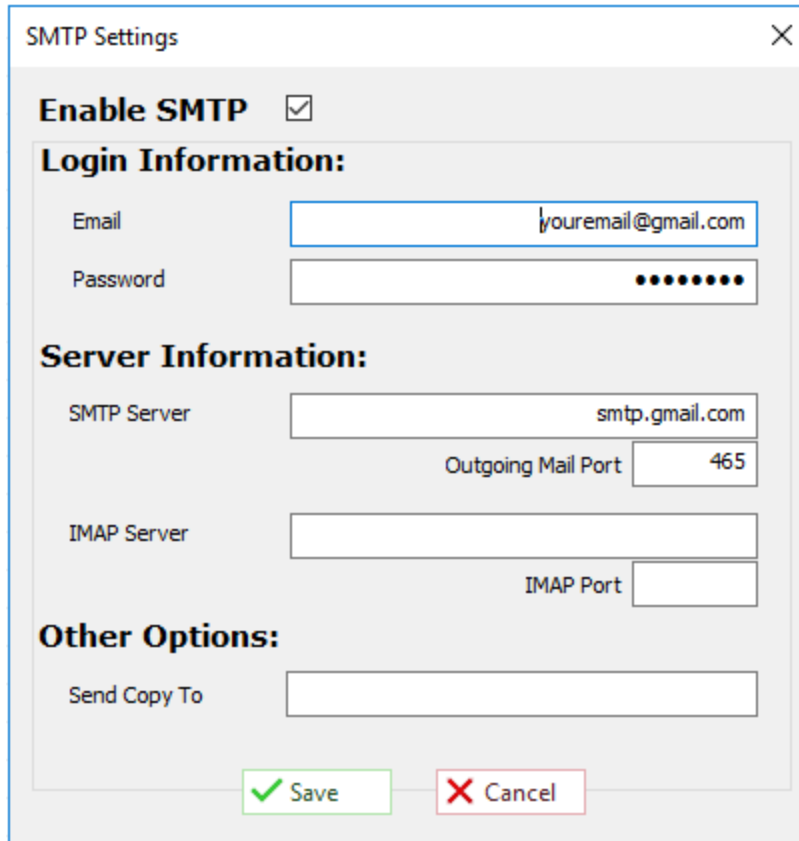
# SMTP Client Guide

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If you click the **Browse...** button you can attach a file to the email. Please note, only a single file can be attached to an email. If a file is already attached, and if you select a new file, the original file will no longer be attached to the email.

## SMTP Example - Gmail:

To configure the Printer's Plan SMTP client to work with Gmail enter the following settings:



The screenshot shows a dialog box titled "SMTP Settings" with a close button (X) in the top right corner. The dialog is divided into several sections:

- Enable SMTP:** A checkbox that is checked.
- Login Information:**
  - Email:** A text field containing "youremail@gmail.com".
  - Password:** A password field with 10 dots.
- Server Information:**
  - SMTP Server:** A text field containing "smtp.gmail.com".
  - Outgoing Mail Port:** A text field containing "465".
  - IMAP Server:** An empty text field.
  - IMAP Port:** An empty text field.
- Other Options:**
  - Send Copy To:** An empty text field.

At the bottom of the dialog, there are two buttons: a green "Save" button with a checkmark icon and a red "Cancel" button with an X icon.

For the **Password** field, you will need an app password -- this is a different password than your regular Gmail account password.

Gmail does allow you to add your account to Printer's Plan without setting up two-factor authentication and using an app password, but you must turn on a setting that allows "less secure apps" to connect to your account. We do not recommend this setting. We recommend turning on two-factor authentication and using an app password.

To get an app password, use the following steps.

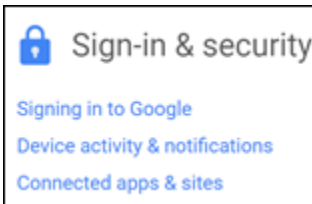
1. Go to [Gmail](https://mail.google.com) from your browser, then select the **Google apps** icon in the upper right corner of the screen.

# SMTP Client Guide

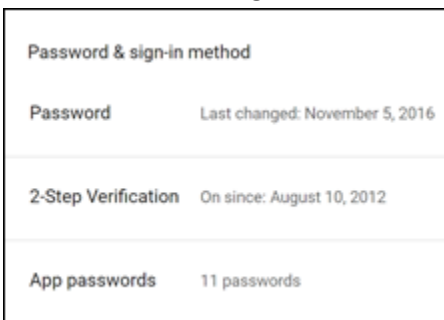
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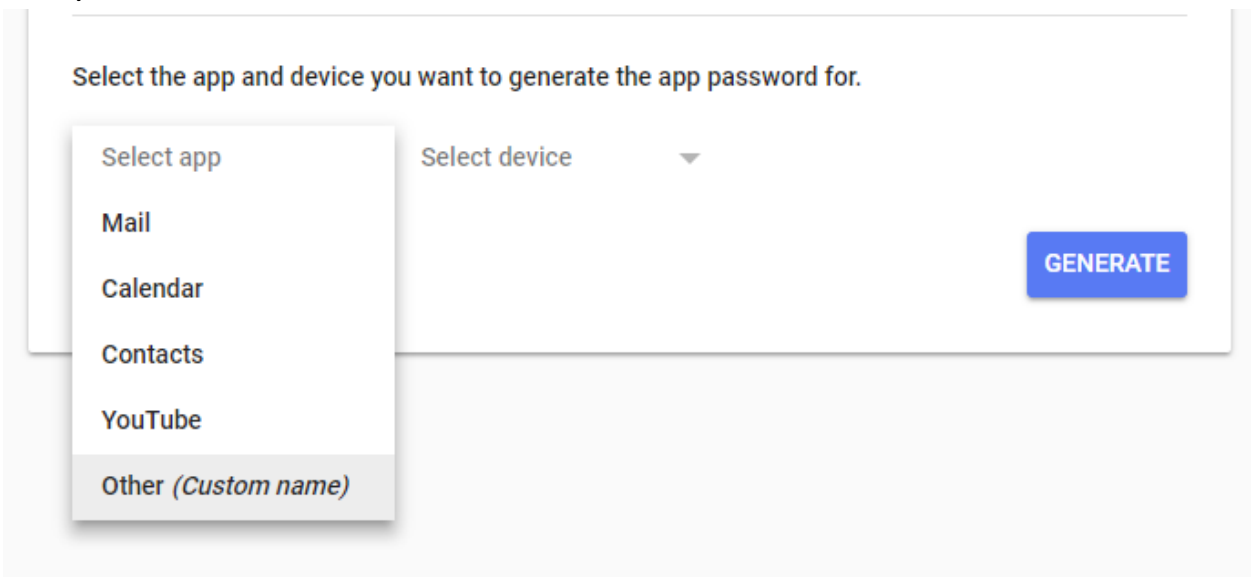
2. Select **My Account**. Under Sign-in & security, select **Signing in to Google**.



3. Under Password & sign-in method, select **App passwords**.



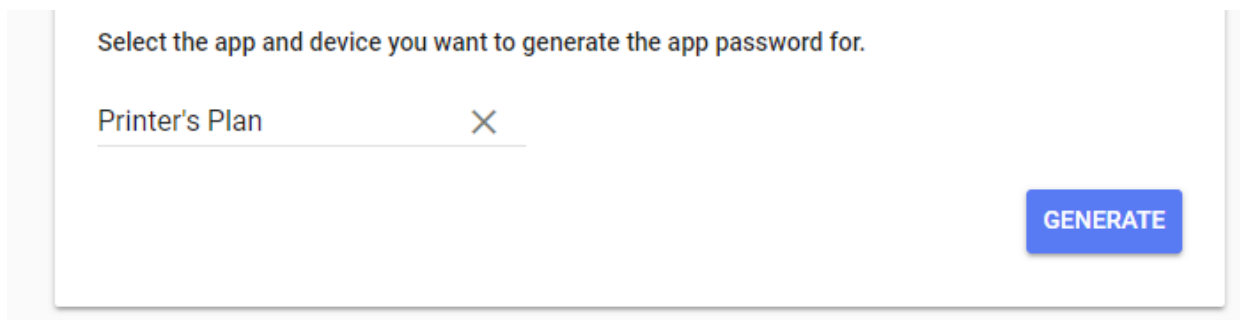
4. Enter your Google password and then select **Sign in**.
5. At the bottom of the next screen, under **Select the app and device you want to generate the app password for**, click on **Select app**. From the menu that appears select **Other (Custom Name)**:



## SMTP Client Guide

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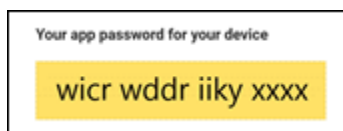
6. Type **Printer's Plan** and click the **Generate** button:



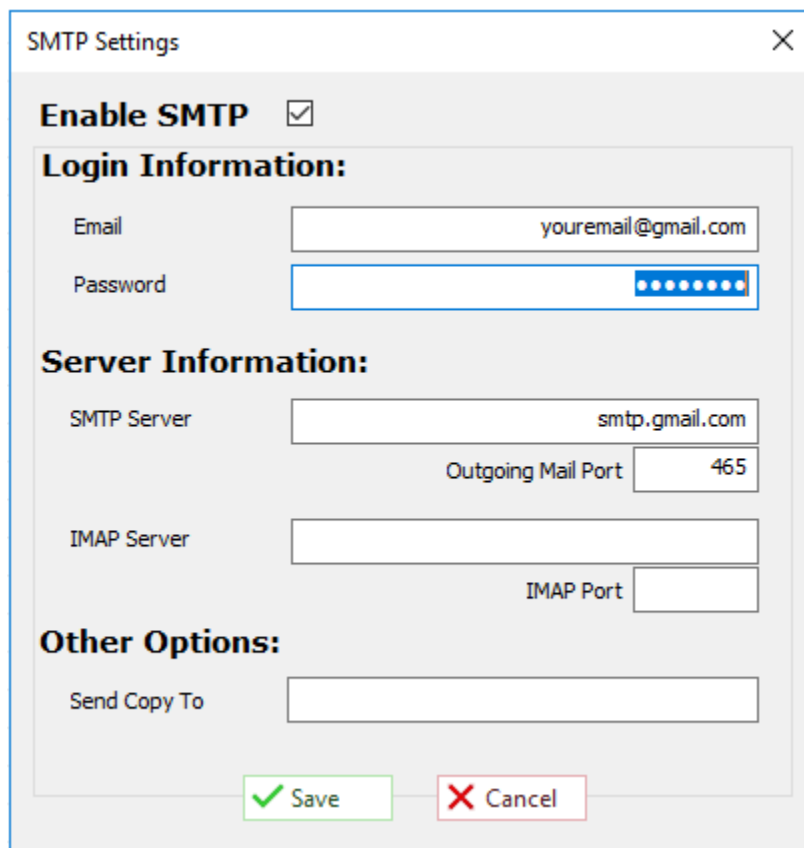
Select the app and device you want to generate the app password for.

Printer's Plan

7. Google will display an app password for you.



8. Copy this password (without the spaces) and enter this text in the **Password** field of the Printer's Plan SMTP Settings window.



SMTP Settings

**Enable SMTP**

**Login Information:**

Email

Password

**Server Information:**

SMTP Server

Outgoing Mail Port

IMAP Server

IMAP Port

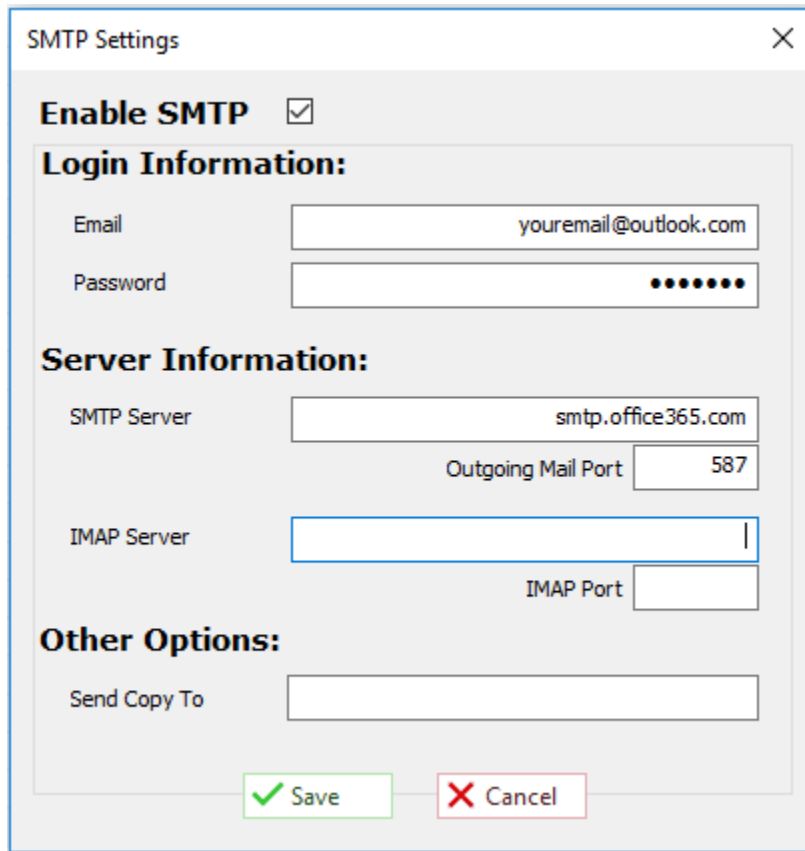
**Other Options:**

Send Copy To

## SMTP Client Guide

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### SMTP Example - Office365:



The screenshot shows a dialog box titled "SMTP Settings" with a close button (X) in the top right corner. The dialog is organized into three sections:

- Enable SMTP**: A checkbox that is checked.
- Login Information:**
  - Email**: A text field containing "youremail@outlook.com".
  - Password**: A text field with masked characters (dots).
- Server Information:**
  - SMTP Server**: A text field containing "smtp.office365.com".
  - Outgoing Mail Port**: A text field containing "587".
  - IMAP Server**: An empty text field.
  - IMAP Port**: An empty text field.
- Other Options:**
  - Send Copy To**: An empty text field.

At the bottom of the dialog, there are two buttons: a green "Save" button with a checkmark icon and a red "Cancel" button with an X icon.

If your email account requires two-step verification you will need to create an App Password. This app password would then be entered Password field of the Printer's Plan SMTP Settings window.

The following page outlines how to create an app password:

<https://support.office.com/en-us/article/Create-an-app-password-for-Office-365>