BluWave- Email Settings

For support please contact: 011 462 6871 or support@bluwave.co.za.

Table of Contents

1   Email Settings in BluWave

In order for BluWave to send emails and quotes on the users' behalf as well as integrate with Outlook, the email settings would need to be correctly in the users' profile.

In case of uncertainty, please contact your IT consultant regarding the correct details necessary for the setup of the email settings.

1.1   Getting to the users' profile

1. Home Tab > Edit My Profile sub-tab
2. User Profile-link at the top of the page
3. System Setup Tab > Edit Profile/ Administer Users sub-tab

1.2   Type of Email Settings (protocol)

In short, this is the channel used by email providers to send and receive emails.
- Pop3
- Imap
- Gmail
- Exchange
- Office 365

In the user profile please make sure to choose the correct email settings you are using and fill in the settings accordingly.

1.2.1   Pop3 & Imap

Pop 3 & Imap uses the same settings.

Regarding IMAP:
In **some** instances some IMAP Servers may function with the IMAP server captured in the SMTP server under POP3 or Exchange Server.

Please make sure that the correct settings for SSL and the SMTP port is completed.

1.2.2 Gmail

Do you want BluWaveCRM to book appointments into your email calendar? ☑

Please choose which email client/calendar you are using? ◯ POP3 (ICal) ◉ Gmail ◯ Exchange/Outlook 365

Email SMTP Settings : (The SMTP settings are used when sending emails from BluWave CRM)

|			
SMTP	smtp.gmail.com	SMTP User Name	mibpsnyders@gmail.com
Secure Connection (SSL)	☑	SMTP Password	••••••••••••
SMTP Port	587		

The port will always be 587 and the SSL need to be ticked.

Gmail users would need to adjust their google account setting in order to allow BluWave to connect with their calendar and email.

Please follow these steps in your browser:
If you are logged into your Gmail account in your browser you should see your profile bubble at the top right hand corner of the browser window.
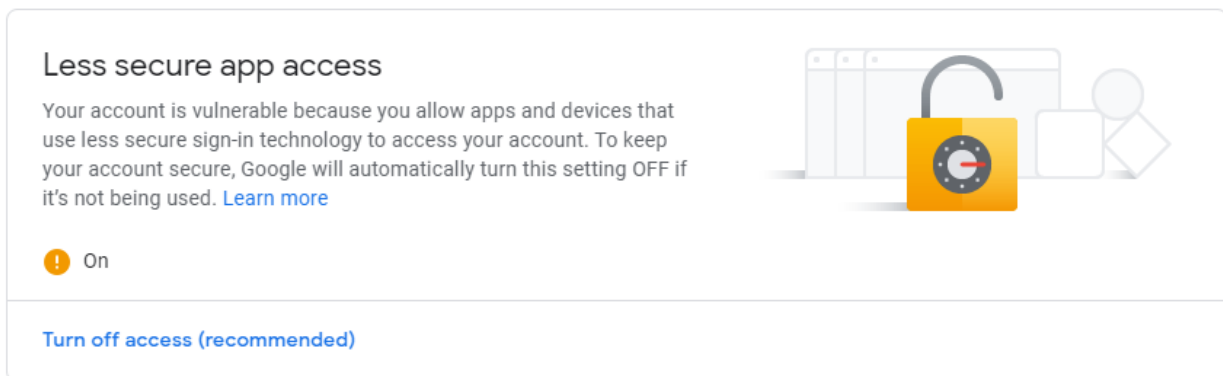Once you clicked on it, you should see an option that relates to managing your account.
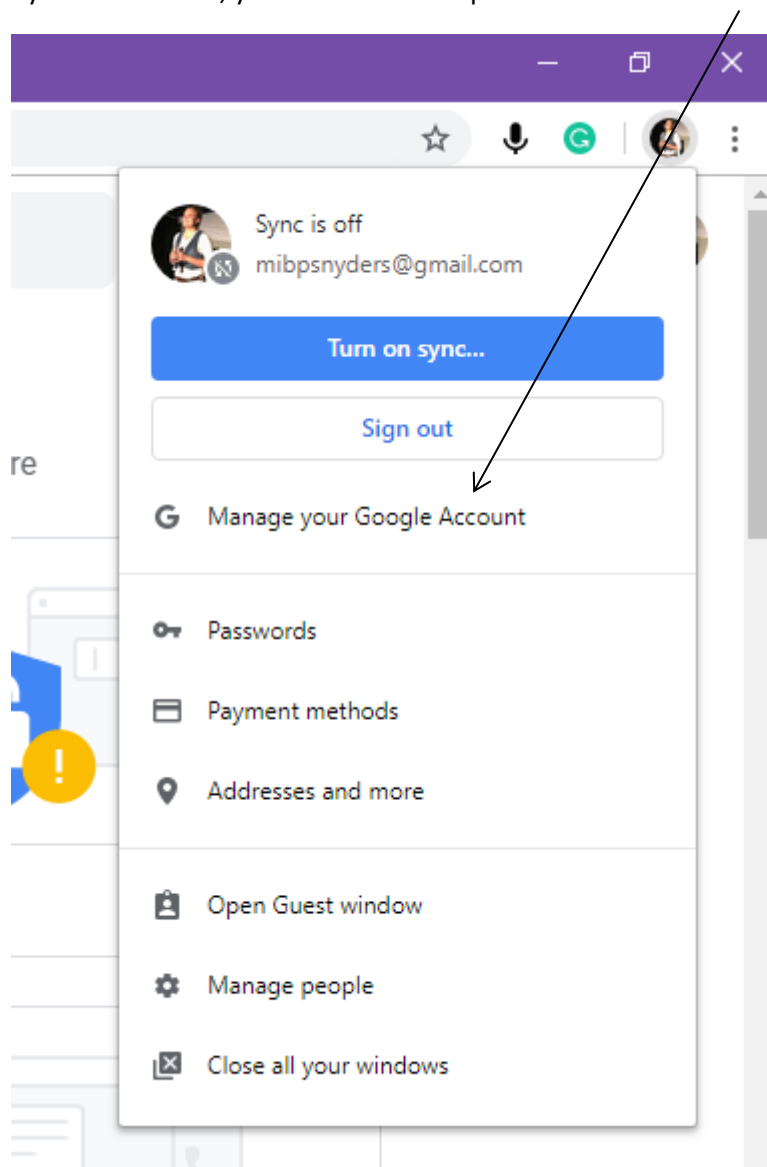
You should see the following screen, when you chose to manage your google account. Make sure to select the Security option on the left-hand side of the screen.
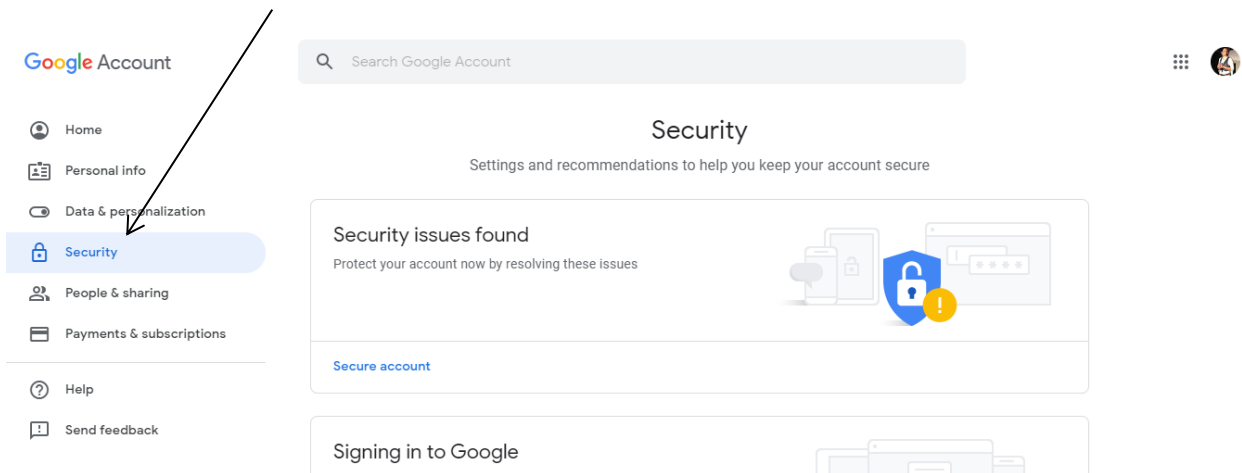
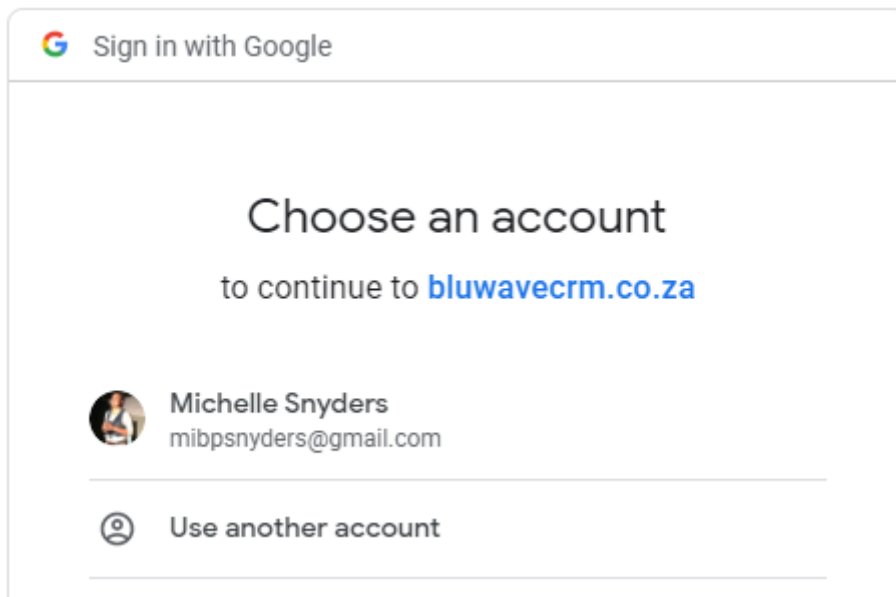Scroll down on this page to the Less secure app access panel.

Make sure that this is on.

When booking the first activity in Bluwave, Google would automatically request that the user allows access to their Google Calendar.

An additional page should automatically pop up, that request the user to confirm their log in details to their Google Account.

The user would need to select with which account they would like to proceed. Please see the example on the next page.

G Sign in with Google

Choose an account

to continue to **bluwavecrm.co.za**

Michelle Snyders
mibpsnyders@gmail.com

Use another account

Once the user selects an account, the following screen would show:

This app isn't verified

This app hasn't been verified by Google yet. Only proceed if you know and trust the developer.
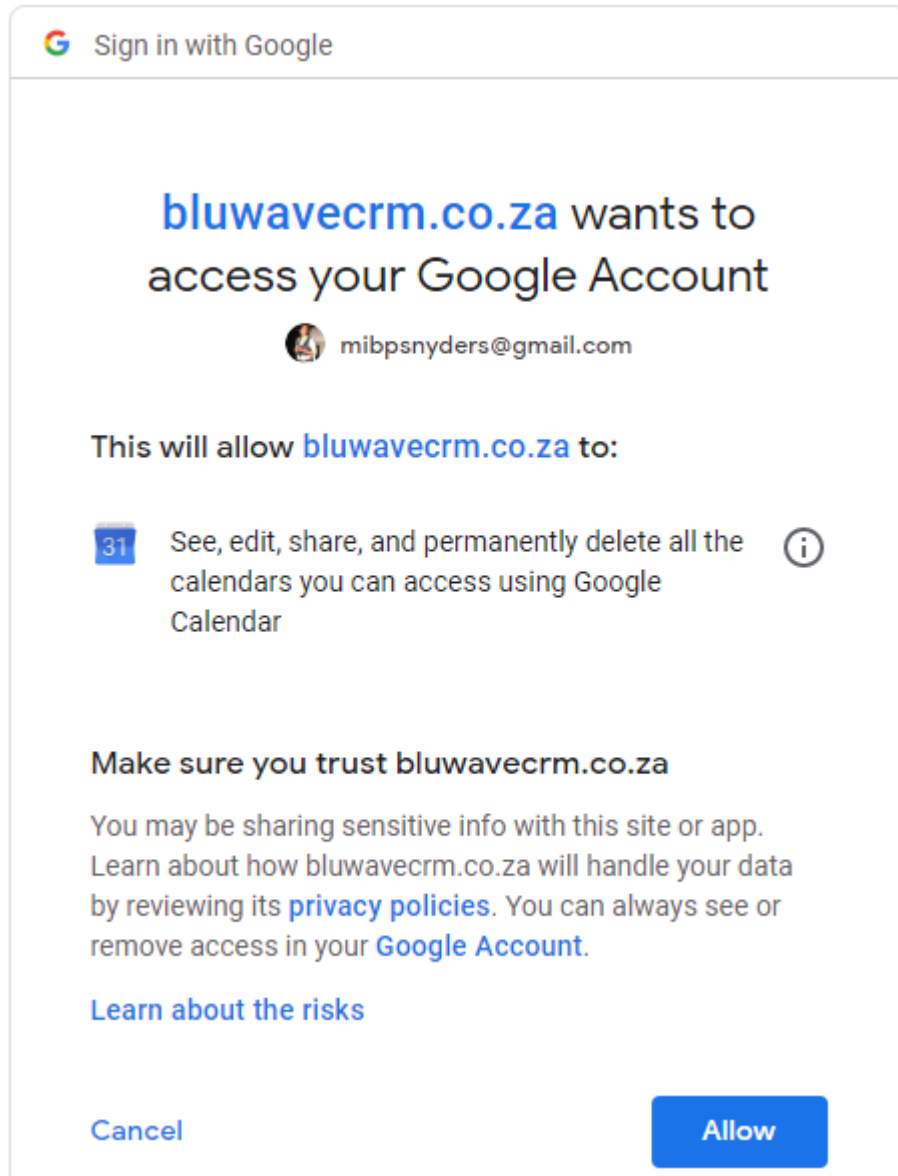
Advanced   **BACK TO SAFETY**

Click on the **Advanced link** to reveal more options.

Google hasn't reviewed this app yet and can't confirm it's authentic. Unverified apps may pose a threat to your personal data. Learn more

Go to bluwavecrm.co.za (unsafe)

Click on the bottom link: **Go to bluwavecrm.co.za (unsafe)**

Click on **Allow** to give BluWave access to the Google Email and Calendar.

After clicking on Allow the user would be redirected back to Bluwave and they would be able to book appoints (that will pull through to their google calendars) and send emails.

1.2.4   Exchange & Office 365

Exchange and Office 365 uses the same settings as well.

Only the blue block needs to be filled in.

For Office 365 Users-
Use the below web service address:
https://outlook.office365.com/EWS/Exchange.asmx

1.3   Connecting BluWave with an Email provider

Bluwave can push appointments created in Bluwave to a third party email calendar (i.e. Microsoft Outlook, or Google Calendar).

In the case of Pop3/ Imap emails sent won't be saved in the third party sent items, however with Exchange, Gmail and Office 365 a copy of the sent emails will be shown in the sent items.

For appointments to pull through to the third party email calendar, make sure the following setting is ticked in the users' profile:

1.4 Confirming that the Username and Password for Exchange and Office 365 are correct:

The main reason why the integration with Exchange or Office 365 might not work could be that the username and password is entered incorrectly.

It would be best to check these details by following these steps:
Open a new tab within your browser (usually this can be done by clicking on a **Plus icon** next to the existing tabs) and copy the Exchange Web Service into the **URL bar** and press **Enter** on the keyboard.
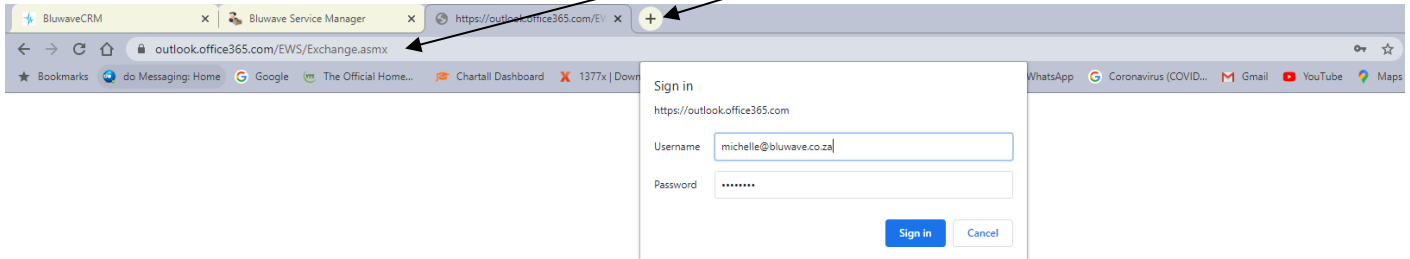
Once the Enter Key is pressed, the browser will search for the URL and a Sign In pop-up will appear.

Type in the relevant Username and Password and click on the **Sign In button**.

- If the details are **Correct** the pop-up will disappear and show a page with wording that looks like coding- the user could ignore this and simply close the tab.
- If the details are **Incorrect** the pop-up will re-appear again for the user to re-enter their details.