Email Client Configuration Guide

Email Configuration

This guide explains how to configure a few of your favorite 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
    - Thunderbird
- 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.

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.

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 an ampersand symbol (@). The second part is the domain or host name, usually the company name of your provider.

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.

(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 provided to you by your provider.

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.<yourdomain>.<tld>
outgoing server	mail.<yourdomain>.<tld>

Note the <> brackets denote a variable that will be replaced.

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.

Your software may or may not require this information. It is usually requested in order for your software to identify further options to offer you but we are not concerned with such settings.

If your provider has not explicitly listed Server/Protocol information, it might be found in the incoming server name if the name is either pop.<yourdomain>.<tld> or imap.<yourdomain>.<tld>.

Otherwise, phone your provider to retrieve this information or retrieve it from their customer support web page.

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@<yourdomain>.<tld>.
Password:	The password given to you by your provider.
Incoming Server:	The exact name of this server. For example: mail.<yourdomain>.<tld>
Outgoing Server:	The exact name of this sever. For example: mail.<yourdomain>.<tld>
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.
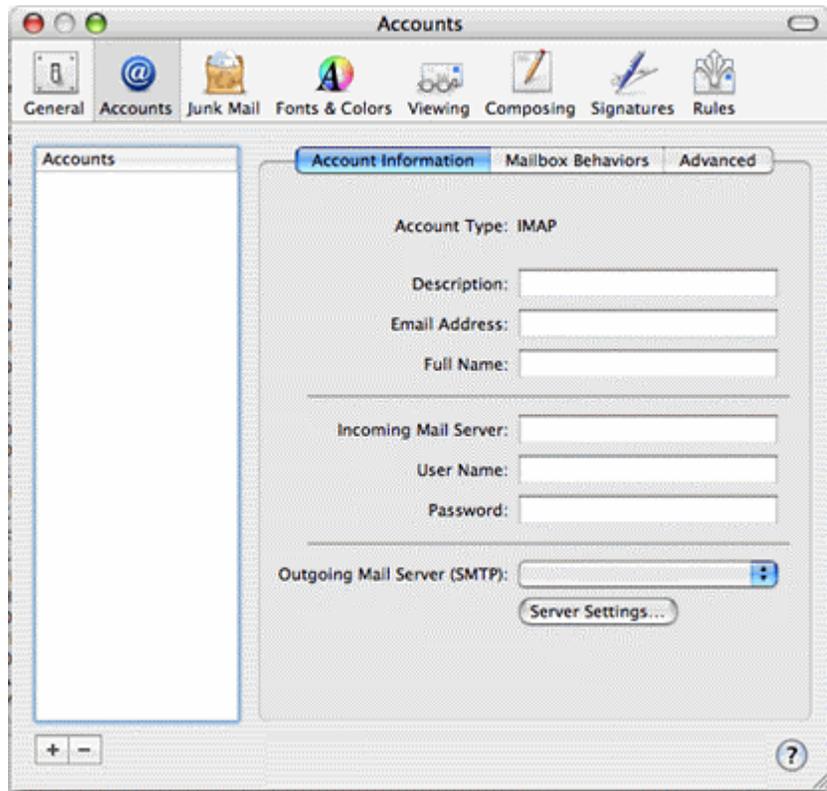
Mail (Mac OS.X)

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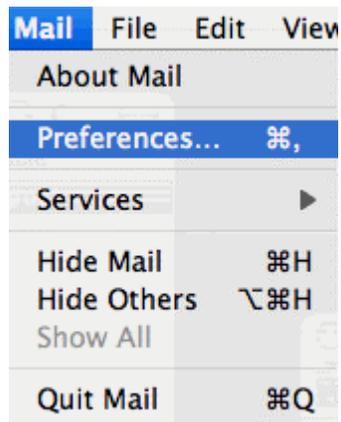
Click the **Mail** menu and select **Preferences**.

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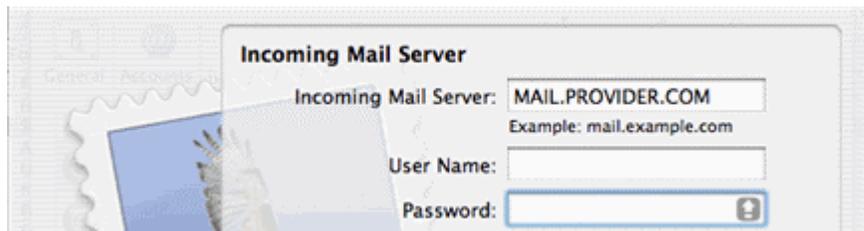
6. Click **Continue**.
7. For **Authentication**, select Password.

8. Click **Continue**.
9. Type the name of the outgoing serve 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.
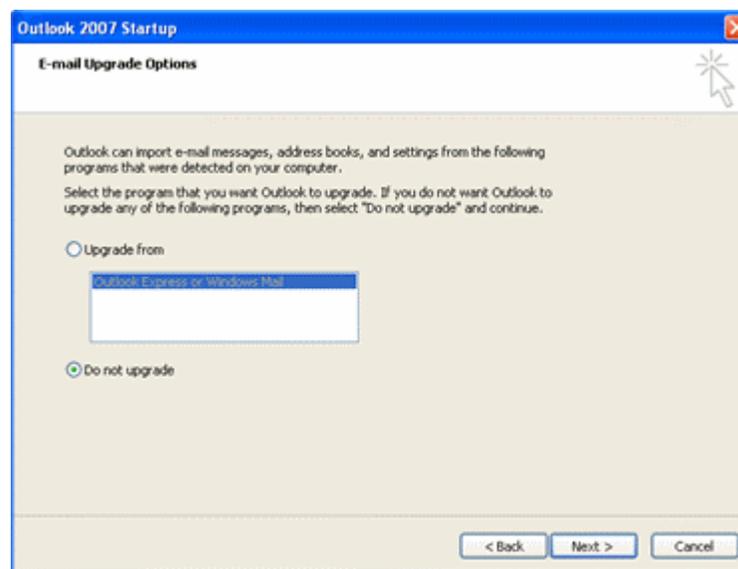
1. Open Outlook.
   If there are no accounts currently configured in Outlook, the Wizard will launch.
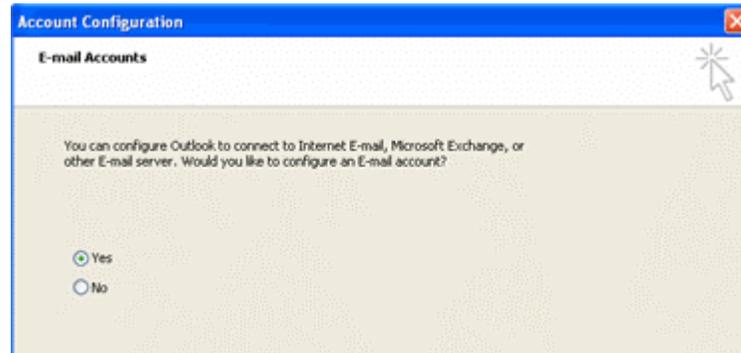

Click **Next**.

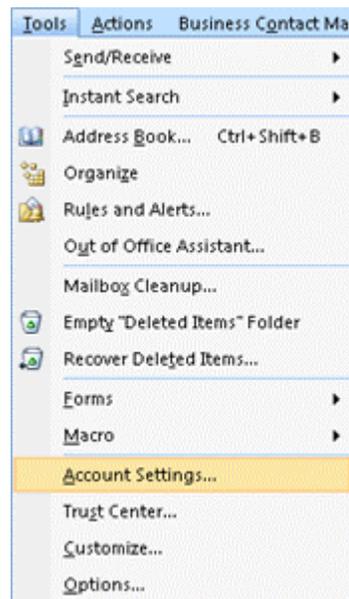If you have another mail client on your computer, this window may open:

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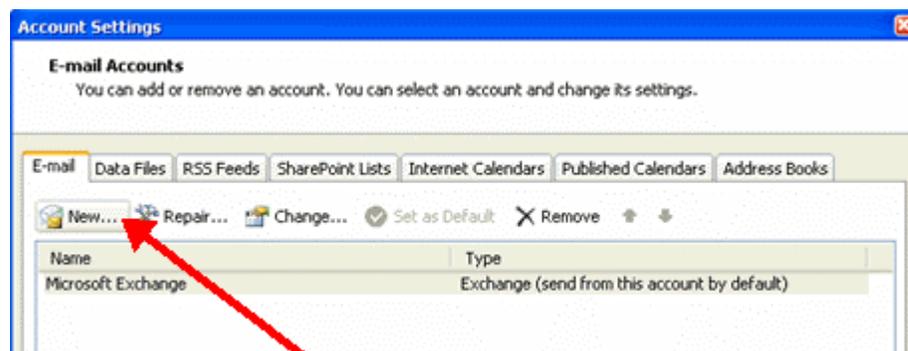

Select **Yes** and click **Next**.

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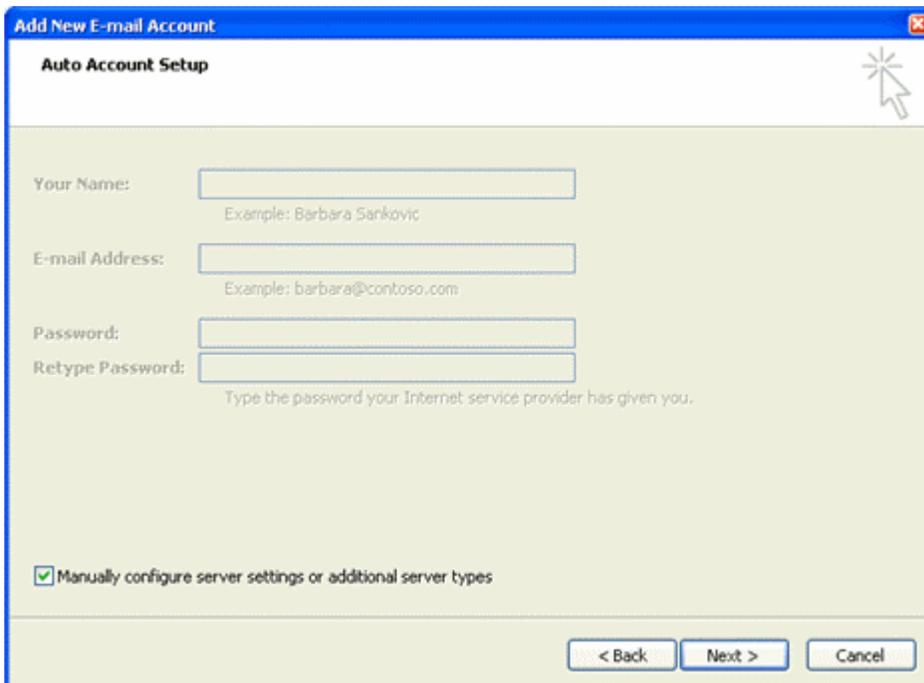

The Account Settings window opens with the E-mail tab showing:

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

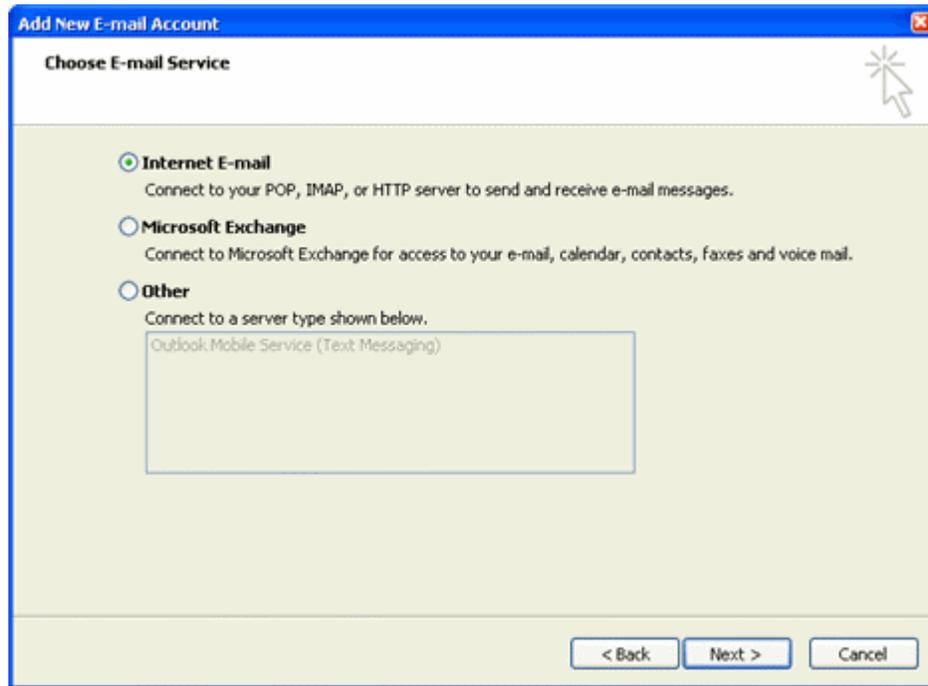2. Click the **Microsoft Exchange, POP3, IMAP, or HTTP** option and click **Next**.
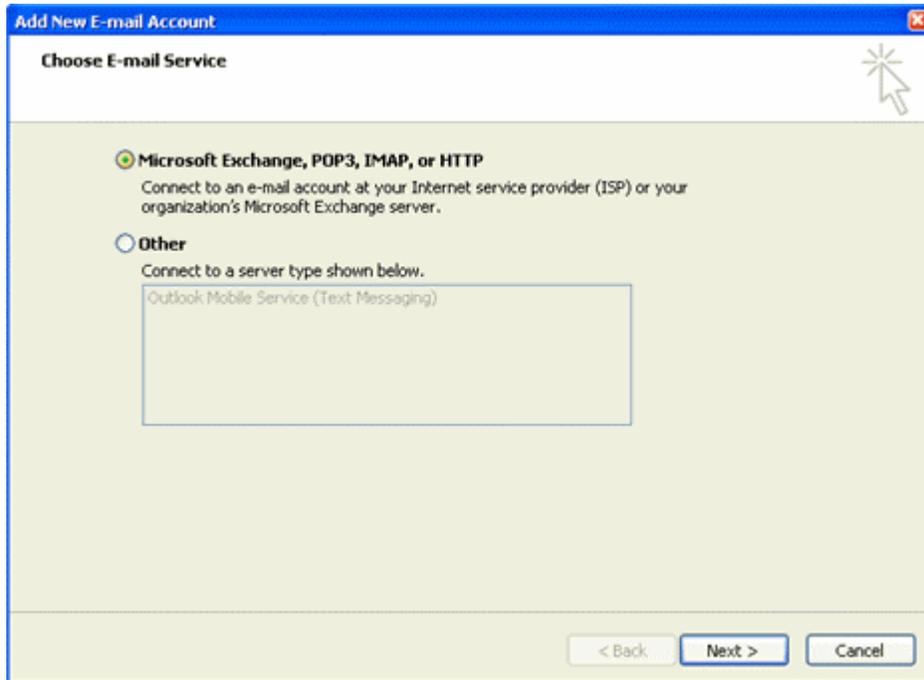
3. Click the **Manually configure server setting or additional server types** checkbox and click **Next**.

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.

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 is 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.
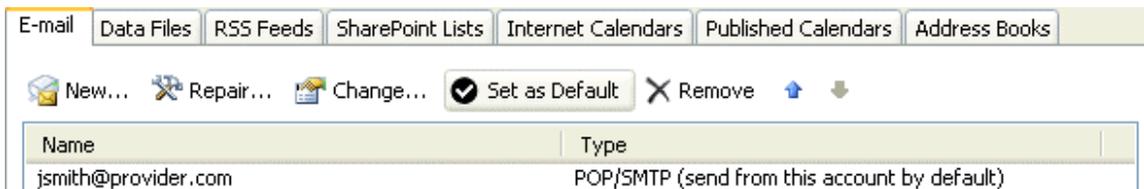
12. Click **Next**.

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.

| E-mail | Data Files | RSS Feeds | SharePoint Lists | Internet Calendars | Published Calendars | Address Books |

New... Repair... Change... Set as Default ✕ Remove ⬆ ⬇

Name	Type
jsmith@provider.com	POP/SMTP (send from this account by default)

15. Click **Close**.

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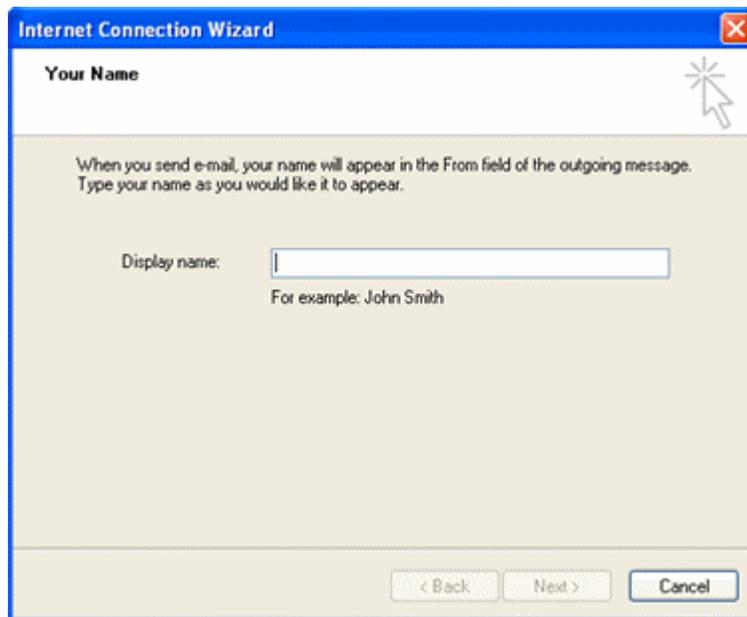
**Note** Display name is the name that will populate the From field in your outgoing mail.

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


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**.
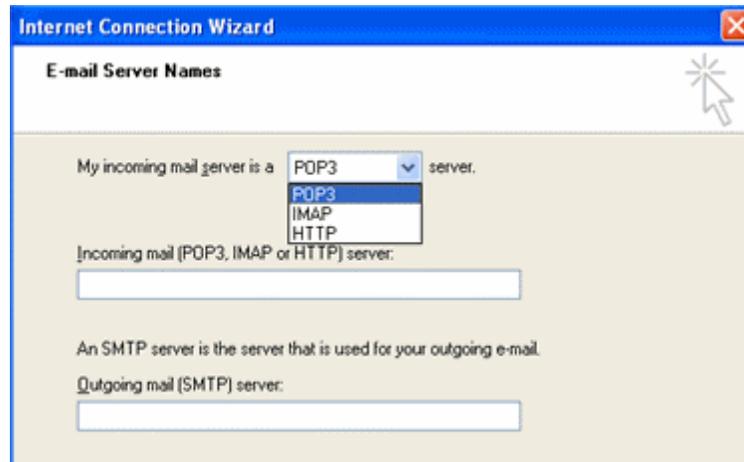
5. Provide the following information:
    a. Type your user or account name given to you by your provider in the **Account name** field. (Remember, this is your full email address.)
    b. Type the password given to you by your provider in the **Password** field.
    c. Ensure that the **Remember password** checkbox is selected.
    d. Click **Next**.
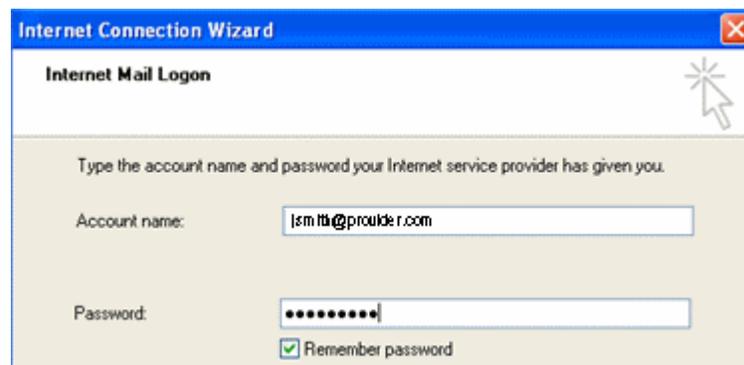
6. Click **Finish**.
    Now you need to ensure that SMTP authentication is turned on.
7. Click the **Tools** menu and select **Accounts**.
8. Click the **Mail** tab and highlight the account you just setup.
9. Click the **Properties** button.
10. Click the **Servers** tab.
11. Go to the **Outgoing Mail 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.

Thunderbird

1. Open Thunderbird.
   If the Import Wizard window opens, select **Don't import anything** and click **Next** and go to step 3.

Note This guide does not cover the Import Settings and Mail Folder From function.

Optionally, when you open Thunderbird, the default splash screen appears.
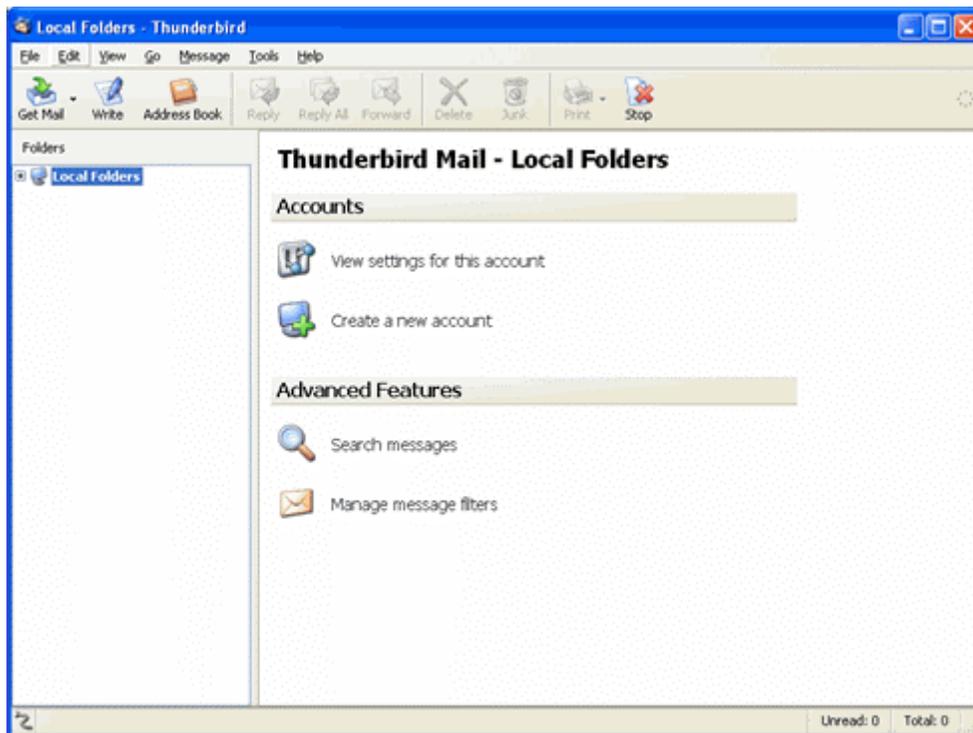
Click the **Create a new account** link.

If the Thunderbird Mail - Local Folder splash screen is not available to you, click the **Tools** menu and select the **Account Settings** option.
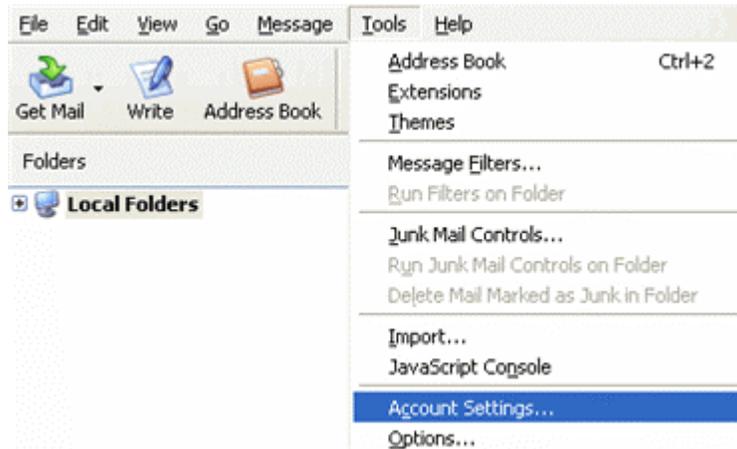
2. Click the **Add Account** button.
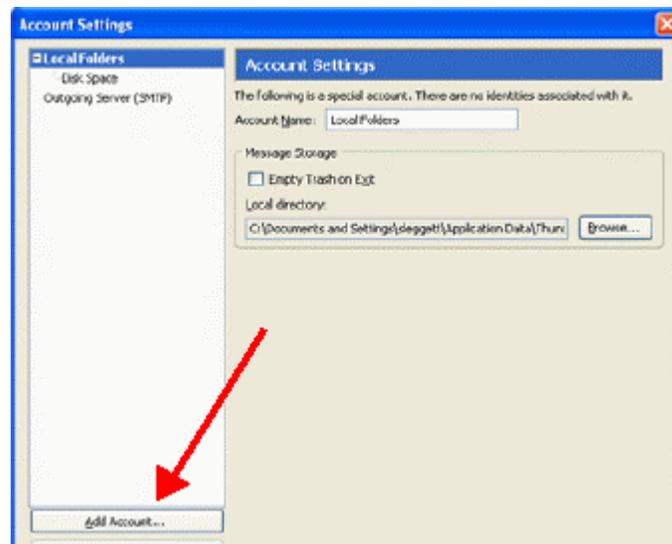
3. Select the **Email account** option and click **Next**.

4. Provide the following information:
   a. Type your name in the **Your Name** field.
   b. Type the email address given to you by your provider in the **Email Address** field.
   c. Click **Next**.

5. Select **POP** or **IMAP** by clicking on the option you want.
   a. Type the name of the incoming server given to you by your provider in the **Incoming Server** field.
   b. Select an option for **Use Global Inbox**.

Folder View without Use Global Email

Folders

- ⊟ 📧 **Personal Email**
  - 📨 Inbox ⬅
  - 📝 Drafts
  - 📄 Templates
  - 📧 Sent
  - 🗑 Trash
- ⊟ 💻 **Local Folders**
  - 📤 Unsent
  - 🗑 Trash
  - 📁 Drafts
  - 📁 Sent

Folder View with Use Global Email

Folders

- ⊟ 💻 **Local Folders**
  - 📨 Inbox ⬅
  - 📤 Unsent
  - 📝 Drafts
  - 📧 Sent
  - 🗑 Trash

c. Type the name of the outgoing server given to you by your provider in the **Outgoing Server** field and click **Next**.

Account Wizard

Server Information

Select the type of incoming server you are using.
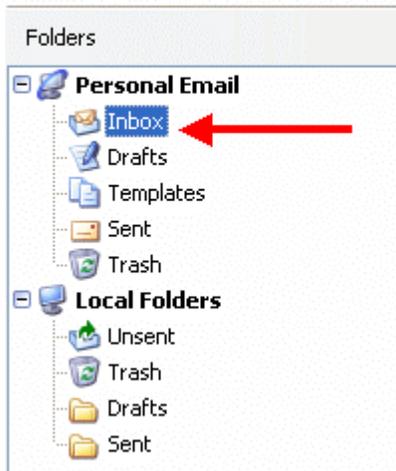
◉ POP   ○ IMAP

Enter the name of your incoming server (for example, "mail.example.net").

Incoming Server: [   ]

Uncheck this checkbox to store mail for this account in its own directory. That will make this account appear as a top-level account. Otherwise, it will be part of the Local Folders Global Inbox account.

☑ Use Global Inbox (store mail in Local Folders)

Enter the name of your outgoing server (SMTP) (for example, "smtp.example.net").

Outgoing Server: [   ]

6. Type your user or account name given to you by your provider in the **Incoming User Name** and **Outgoing User Name** fields and click **Next**. (Remember, this is your full email address.)

Account Wizard

User Names

Enter the incoming user name given to you by your email provider (for example, "jsmith").

Incoming User Name: jsmith@orturder.com

Enter the outgoing user name given to you by your email provider (this is typically the same as your incoming user name).

Outgoing User Name: jsmith@orturder.com

7. Type in a name or identifying description in the **Account Name** field and click **Next**.

Account Wizard

Account Name

Enter the name by which you would like to refer to this account (for example, "Work Account", "Home Account" or "News Account").

Account Name:

8. Click **Finish**.
   You now need to ensure that SMTP authentication is turned on.
9. Click the **Tool** menu and select **Account Settings**.
10. Select **Outgoing Server (SMTP)** in the directory tree.
11. Select the SMTP server for the account you just created and click the **Edit** button beside it.
12. In the SMTP Server window, ensure the **Use name and password** checkbox is checked. If it is not, click it.
13. If you had to click the checkbox, enter your user name in the **User Name** field. (Remember, this is your full email address.)
14. Click **OK** and then click **Ok** again.

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.

SMTP

Simple Mail Transfer Protocol (SMTP) is the method used to send your email. 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 mail server in order to send mail.

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 not, click it to select it.
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 it is not, select it.
9. Click **OK.**
10. **Click Apply**.
11. Click **OK.**
12. **Click Close**.

Thunderbird

1. Click the **Tool** menu and select **Account Settings**.
2. Select **Outgoing Server (SMTP)** in the directory tree.
3. Select the SMTP server you wish to change in window and click the **Edit** button beside it.
4. In the SMTP Server window, click the **Use name and password** checkbox.
5. Enter your user name in the **User Name** field. (Remember, this is your full email address.)
6. Click **OK** and then click **Ok** again.
7. Try sending your mail.

Setting or Changing SMTP ports

SMTP uses port 25 to do this. 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.

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 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 provider for assistance.

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 **Advanced** tab.
5. In the **Outgoing mail (SMTP)** field, type 587.
6. Click **OK**.
7. Click **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 provider for assistance.

Thunderbird

1. Click the **Tool** menu and select **Account Settings**.
2. Select **Outgoing Server (SMTP)** in the directory tree.
3. Select the SMTP server you wish to change in window and click the **Edit** button beside it.
4. In the SMTP Server window, change **Port:** to 587.
5. Click **OK** and then click **Ok** again.
6. 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 provider for assistance.