



BlueCamroo Integration User Guide

Email

GMail, Exchange, and IMAP



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Standard and Enhanced Email Integration in BlueCamroo

BlueCamroo can send and receive emails on your behalf using BlueCamroo servers (Standard Integration) or can connect with any Microsoft Exchange server, GMail, or any SMTP/IMAP mail server for an improved email experience (Enhanced Integration).

Email in BlueCamroo it falls into three broad categories:

- i. System email: automated notification emails generated by BlueCamroo
- ii. Campaign email: bulk emails generated by BlueCamroo's Email Marketing module
- iii. Individual user email: the email sent and received by an individual user in their own BlueCamroo workspace.

System Emails

System emails are automated emails that BlueCamroo sends out, e.g., invoice cover emails and notification emails.

Standard Integration

BlueCamroo uses its own SMTP servers to send system email. Occasionally, this may result in problems with email deliverability due to the server being on a different domain than the *from* address of your email.

Enhanced Integration

BlueCamroo uses your own SMTP email server to send system email. This may improve the deliverability of your email by ensuring the domain of the server matches that of the *from* address of your email.

Campaign Emails

Campaign emails are bulk emails generated by BlueCamroo's Email Marketing module.

Standard Integration

BlueCamroo uses its own SMTP bulk email servers to send campaign email. Occasionally, this may result in problems with email deliverability due to the server being on a different domain than the *from* address of your email. Additionally, it also requires the purchase of campaign email credits from BlueCamroo.

Enhanced Integration

BlueCamroo uses your own SMTP email server to send campaign email. This may improve the deliverability of your email, and no per-email charge will apply.

Campaign email settings are configured by a BlueCamroo administrator.

Individual User Emails

Individual user emails are communications sent directly by a BlueCamroo user, i.e., by creating an email and sending it to a recipient.

Standard Integration

BlueCamroo uses its own SMTP servers to send individual user email.

If the recipient sends a reply, the *reply-to* address will look something like this: email-123@acme.com.

Occasionally, this may result in problems with email deliverability due to the server being on a different domain than the *from* address of your email.

Enhanced Integration

BlueCamroo offers email integration with Microsoft Exchange, with GMail, and with any SMTP/IMAP mail servers.

Users of Exchange, GMail or an SMTP/IMAP server are able to use their Outlook or Gmail or other email clients to reply to emails from a thread started in BlueCamroo, and those emails will be synced to BlueCamroo automatically. If users integrate with Exchange or GMail, replies to a BlueCamroo-related email thread will automatically copy to their Sent folder in the BlueCamroo workspace.

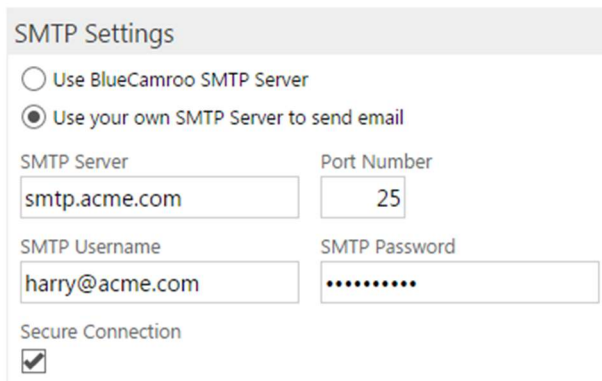
The enhanced process may also improve the deliverability of your email by ensuring the domain of the server matches the *from* address of your email.

Setting Up Enhanced Email Integration

Selecting a Mail Server for Your System Email (Administrators Only)

To select a mail server to handle your organization's email and email notifications:

1. In BlueCamroo, navigate to Setup | Company Defaults | Company Details.
2. Under SMTP Settings, select the radio button next to Use your own SMTP Server to send email.
3. In the SMTP server fields, enter the email server's SMTP address and port number. This information is readily available online for most email services; consult your email's online help for the correct settings.
4. Enter the username and password you use for your SMTP server.
5. Click the **Save** button on the Actions Bar.



SMTP Settings

Use BlueCamroo SMTP Server

Use your own SMTP Server to send email

SMTP Server: smtp.acme.com

Port Number: 25

SMTP Username: harry@acme.com

SMTP Password:

Secure Connection:

Selecting a Mail Server for Your Campaign Email (Administrators Only)

To select a mail server to handle your organization's bulk campaign email:

1. In BlueCamroo, navigate to Setup | Campaign Manager | Configuration.
2. Under SMTP Settings, select the radio button next to Use your own SMTP Server to send email.
3. In the SMTP server fields, enter the email server's SMTP address and port number. This information is readily available online for most email services; consult your email's online help for the correct settings.
4. Enter the username and password you use for your SMTP server.
5. Click the Save button on the Actions Bar.

Use BlueCamroo SMTP Bulk Mail Server (Additional Charges Apply)

Use your own SMTP Server to send campaign email

SMTP Server Port Number

SMTP Username SMTP Password

Secure Connection

Default Campaign Access

Email Credits Remaining
100


Selecting a Mail Server for Individual User Email (All Users)

There are three different email options for individual users:

- I. Integration with Microsoft Exchange
- II. Integration GMail
- III. Use another email server




To integrate with Microsoft Exchange

1. In BlueCamroo, navigate to **Setup | Integrations**.
2. In the Exchange/IMAP section, select the  icon.
3. Choose the Exchange server version using the radio button.
4. Enter your Exchange server's URL. Enter your Username and Password.
5. Click the **Save** button on the Actions Bar.


To integrate with GMail

Note: Before Integrating your Gmail account with BlueCamroo, you will first need to enable “Less secure app access” for your Gmail account. You can learn more about this by visiting this [google answer page](#).

1. In BlueCamroo, navigate to Setup | Integrations.
2. In the Google section, select the Gmail icon .
3. Gmail SMTP and IMAP settings are automatically completed; however, we highly recommend that you verify if the settings are correct. Note: This is especially important if you use GSuite.

4. Enter your Google Username and Password.
5. Note: Do not enter anything into the "Last Sync Time" field, this will be auto populated when your Gmail and BlueCamroo Sync. You can also 'force' a sync by clicking the 'Sync Now' button on the bottom.

To use an IMAP-enabled email server to send, receive and sync email

1. In BlueCamroo, navigate to **Setup | Integrations**.
2. In the Exchange/IMAP section, select the  icon.
3. In the SMTP server fields, enter the email server's SMTP address and port number. This information is readily available online for most email services; consult your email's online help for the correct settings.
4. (Optional) for additional security check the Secure Connection box, which may require you to enter a different port number for the server.
5. In the IMAP Server fields, enter the email server's IMAP address and port number. This information is readily available online for most email services; consult your email's online help for the correct settings.
6. (Optional) for additional security check the Secure Connection box, which may require you to enter a different port number for the server.
7. Enter your email username and password.
8. Click the **Save** button on the Actions Bar.

Email Flow

Understanding how Individual Email Flows in Standard and Enhanced Integrations

Standard Integration

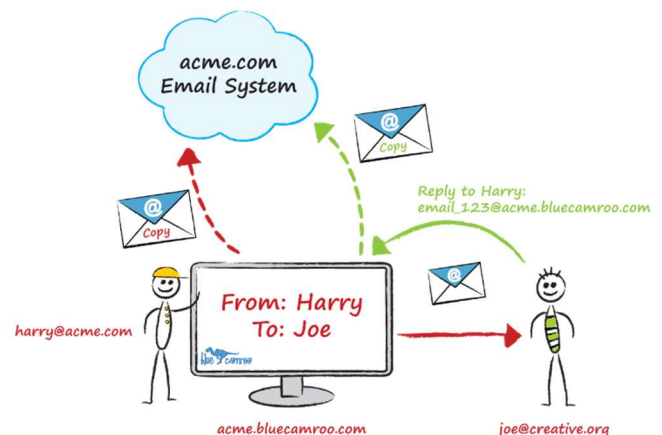
Sending using BlueCamroo email servers

When you send an email from your BlueCamroo workspace using the Standard Integration method, the email is being sent from BlueCamroo's own SMTP servers.

Recipient replying to your email

When replying, the recipient sees a *reply-to* line that is similar to `email-12345@yourworkspace.bluecamroo.com`. This enables the reply to return to BlueCamroo and become part of the customer record.

BlueCamroo will also forward a copy to your regular email address, so you will have access to it there as well.



Enhanced Integration

Sending using your own email server

In the Enhanced Integration method, BlueCamroo connects to your email server to send and receive. For Microsoft Exchange and Google Apps for Business users, a copy will be saved directly to your Sent Mail folder.

Recipient replying to your email

Replies also come back straight into to your email account, so the recipient replies to the address they expect for you.

Thread Synchronization

Emails in the thread are copied from your email server to your BlueCamroo workspace, so everything stays up to date.

If you are working outside BlueCamroo in another mail client, there are also other ways you can get email to copy to BlueCamroo when sending it from outside your workspace:

- When starting an email thread from another email client, using the bcc field to a record's unique drop box email (found in the record's Summary Pane by hovering over its image and clicking the Email Link icon)

