


Beyond - Email Setup

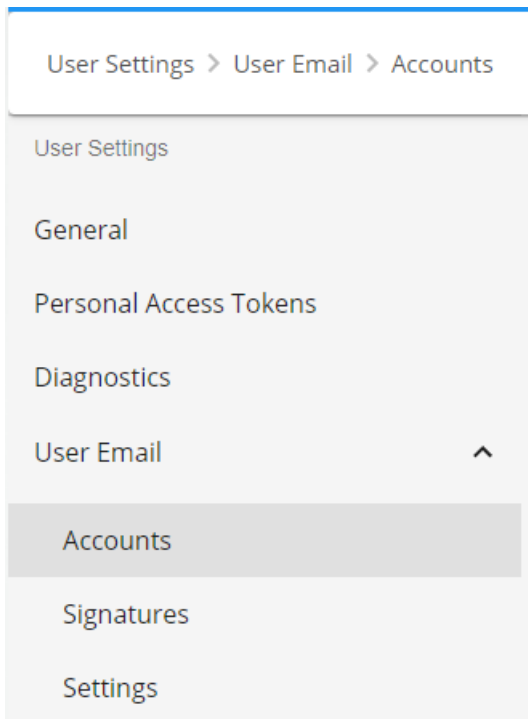
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Beyond™ now offers email functionality which allows you to email anywhere you see an email address in the system. In this article, we will review the settings available for email functionality.

Note Email account within Beyond are separate from email accounts within Enterprise. If you have email accounts within Enterprise, these will need to be setup once more within Beyond.

Where to Find Email Setup

1. Navigate to the  in the upper left
2. Select User Settings
3. Select User Email on the left



The User Email section is split into 3 Sections:

1. [Settings](#)
 2. [Accounts](#)
 3. [Signatures](#)
-

Settings

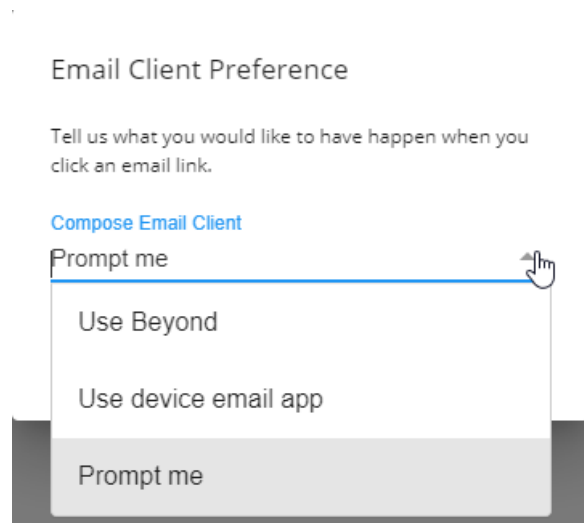
The best place to start is settings. Beyond gives you the option to open your default email client or use Beyond's built in email option.

Benefits to Using Beyond Email Client:

- Still uses your email address
- Keeps you in the system
- Has options for logging messages on records

To Change Your Settings:

1. Navigate to User Settings > User Email > Settings
2. Tap the Edit button on the card
3. Choose from 3 options:
 - **Use Beyond** - always use Beyond Email Client when sending emails
 - **Use Device Email App** - always open your default email program for the device you are on (ex. Outlook, Apple Mail, etc.) when you click on an email address
 - **Prompt me** - ask every time you email which option you would like to use



Adding an Account

If you are going to use the Beyond Email Client instead of your default email program, you will need to add your email(s) into Beyond.

1. Navigate to User Settings > User Email > Accounts
2. Select the + in the upper right
3. Select a provider (if no providers matching your email exist, then choose other)
4. Enter the following information:

Email Account

We will attempt to determine the SMTP settings based on the Email Address provided.

Email Password


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- Email
- Password

5. Select Next. At this point, Beyond will attempt to determine the correct SMTP settings based off the email address that had been entered.

6. Review or modify the information based on what was found:

Email Account TEST

 Please review the SMTP settings for accuracy and make any necessary corrections before clicking NEXT.

* Host * Port * Encryption Method

Email Password

SAVE AS DRAFT CANCEL [< PREVIOUS](#) [NEXT >](#)

7. Once everything has been confirmed, select 'Next'.

8. Review or modify the information based on what was found:

Email Account

* Description

Description is required.

* Name * From Email

Reply-to Email Default Signature

SAVE AS DRAFT CANCEL [< PREVIOUS](#) [SUBMIT](#)

- **Description** - what you want this email identified as (ex. Amelia's Email or My Gmail Account)
- **Name** - Your Name
- **From Email** - email address you are sending from
- **Reply to Email** - this is optional if you would like a different email for them to reply to
- **Default Signature** - signatures that you set up can be defaulted to already be inserted when an email is created from this email address

9. Select Submit

Default Email Settings

Mail Provider	Host	Port	Auth Method
Gmail	smtp.gmail.com	587	Auto
Office 365	smtp.office365.com	587	Auto
GoDaddy	smtpout.secureserver.net	3535	Auto
Yahoo!	smtp.mail.yahoo.com	465	Auto
Mandrill	smtp.mandrillapp.com	587	Auto
Outlook (AKA Hotmail / Live)	smtp-mail.outlook.com	587	Auto
Rackspace	secure.emailsrvr.com	465	Auto

Note Your team's email settings may be different from these. Ask your IT team or email provider for the correct settings for your email. Some email providers, including Gmail, may require you to change your security settings in order to have another application access your email.

Setting Up Email Signatures

Once you've added your email into Beyond, you can set up different email signatures to appear at the bottom of the email you are composing.

Signatures can be defaulted for each email account. You can have multiple signatures.

Note Email signatures within Beyond are separate from email signatures within Enterprise. If you have email signatures within Enterprise, these will need to be setup once more within Beyond.

To Set Up a Signature

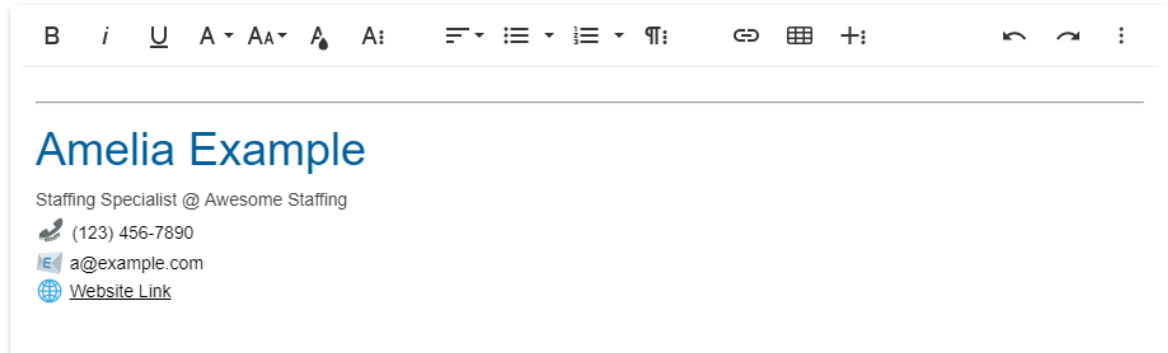
1. Navigate to User Settings > User Email > Signatures
2. Select the + in the upper right to add a new signature
3. Enter a name for your signature (this will be used for you to select from when you want to insert a signature)
4. Copy and paste or type in your signature

Email Signature

Name

Example Signature

Signature




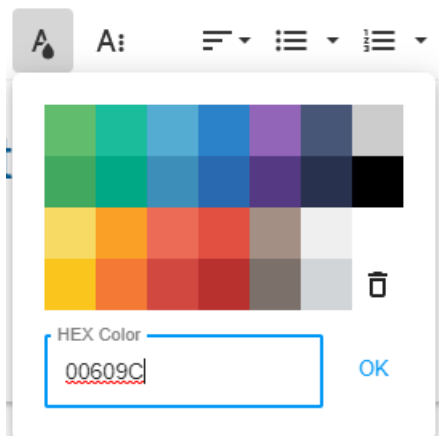
The screenshot shows an email signature editor with a toolbar at the top containing icons for bold (B), italic (i), underline (U), text color (A with a color swatch), font size (AA), font color (A with a color swatch), bulleted list, numbered list, link, table, and more options (+). Below the toolbar, the signature content is displayed: a horizontal line, the name "Amelia Example" in a large blue font, the title "Staffing Specialist @ Awesome Staffing", a phone icon followed by "(123) 456-7890", an email icon followed by "a@example.com", and a globe icon followed by "Website Link".

SAVE AS DRAFT

CANCEL [SUBMIT](#)

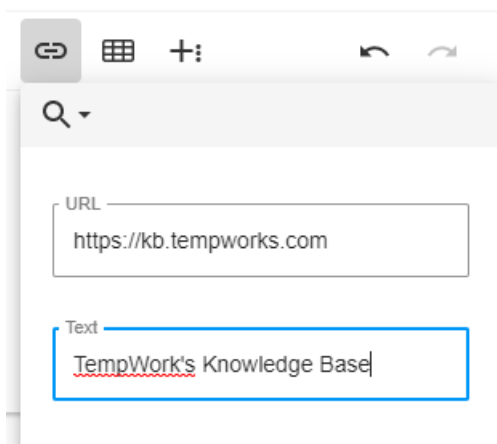
Email Signature Tips & Tricks:

- Selecting the text color button () allows you to pick from default color palette or use the Hex color code to add your own color to match your branding.



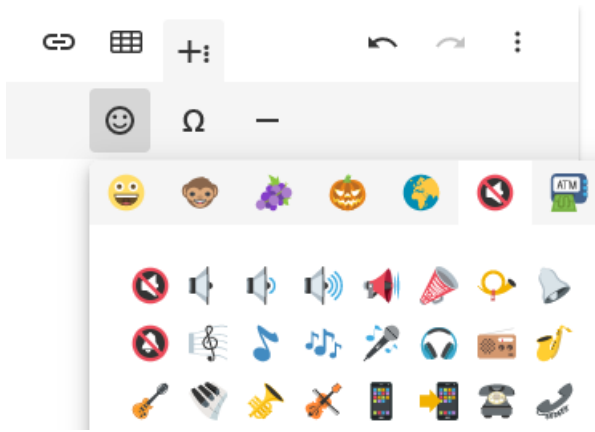
The screenshot shows the text color selection dialog. It features a toolbar with the text color button (A with a color swatch), font size (AA), bulleted list, numbered list, and more options (+). Below the toolbar is a color palette with a grid of color swatches. At the bottom, there is a "HEX Color" input field containing "00609C" and an "OK" button.

- Use the Insert a Link option to include a link to your company's website in your signature.

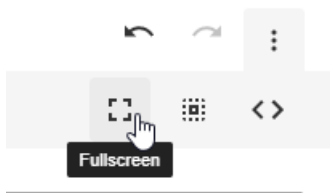


The screenshot shows the insert link dialog. It features a toolbar with the link icon (chain), table icon, and more options (+). Below the toolbar is a search bar with a magnifying glass icon. There are two input fields: "URL" containing "https://kb.tempworks.com" and "Text" containing "TempWork's Knowledge Base".

- Select the More Rich options to add emojis, symbols, or a horizontal line in your signature:



- Select the More Options on the right to view your signature in full screen, select all text, or (if you are feeling tech savvy) use HTML to format your signature.



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