

# Beyond - Mass Mailer Account Setup

Last Modified on 05/01/2026 4:34 pm CDT

## What is a Mass Mailer Account?


A mass mailer email account allows multiple users to use the same email address. Typically these accounts are not tied to an individual but to a service or group. Example, [payroll@staffingcompany.com](mailto:payroll@staffingcompany.com) or [recruiting@staffingcompany.com](mailto:recruiting@staffingcompany.com).

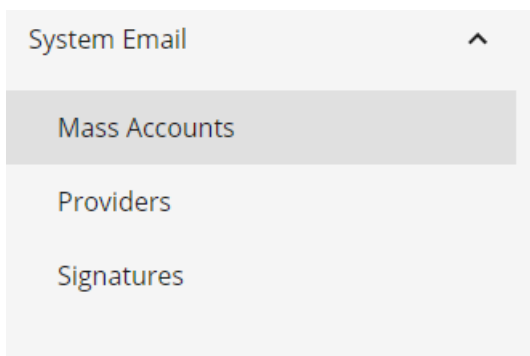
These emails can be set up at the System level in order to be shared with one or more teams to use.

Beyond has a few system level settings that an admin should consider when using email in the system.

**\*Note\*** Only users in a permission type security group with the "Can Administrate" permission will be able to see and set up System Email options.

## Adding a System Mass Account

- Navigate to the  in the upper left
- Select "System Email"
- Select "Mass Accounts"



- Select the "+" in the upper right to add an account
- Choose your provider (if no provider listed, choose other)

Select a provider...

@ Other SMTP >

CANCEL

- Enter the following information:

Mass Email Account

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


Email Password

test@gmail.com .....

SAVE AS DRAFT CANCEL NEXT >

- Email
- Password
- Select "Next". At this point, Beyond will attempt to determine the correct SMTP settings based off the email address that had been entered.
- Review or modify the information based on what was found:

Mass Email Account TEST

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

\* Host \* Port \* Encryption Method

smtp.gmail.com 465 Auto

Email Password

test@gmail.com .....

SAVE AS DRAFT CANCEL < PREVIOUS NEXT >

- Host (SMTP server information - see below)
- Port
- Encryption Method
- Username (usually your email address)
- Password
- Don't know your information? We recommend checking with your IT team. We've included some common [default settings](#) below.
- Select "Next".
- Enter the following information:

Mass Email Account

**\* Description**

\_\_\_\_\_

Description is required.

**\* Name** \_\_\_\_\_ **\* From Email** test@gmail.com

Reply-to Email \_\_\_\_\_ Default Signature \_\_\_\_\_

Teams \_\_\_\_\_

SAVE AS DRAFT CANCEL < PREVIOUS SUBMIT

- **Description** - easy identifier for your users (ex. Onboarding Email or Payroll Email)
  - **Name** - Name you would like to have displayed when sending
  - **From Email** - email address you are sending from
  - **Reply to Email** (optional) - if you would like a different email for the recipient to reply to
  - **Default Signature** (optional) - signatures that you set up can be defaulted to already be inserted when an email is created from this email address
  - **Teams** - Select the team that should have access to this email (Check out [Beyond - Creating & Managing Service Rep Teams](#) for more information)
- 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
Mailchimp (Mandrill)	smtp.mandrillapp.com	587	Auto
Outlook (AKA Hotmail / Live)	smtp-mail.outlook.com	587	Auto
Rackspace	secure.emailsrvr.com	465	Auto

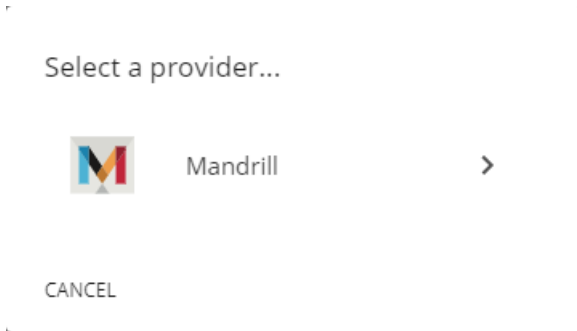
# Providers

This section allows you to add default settings for when your users set up their own email.

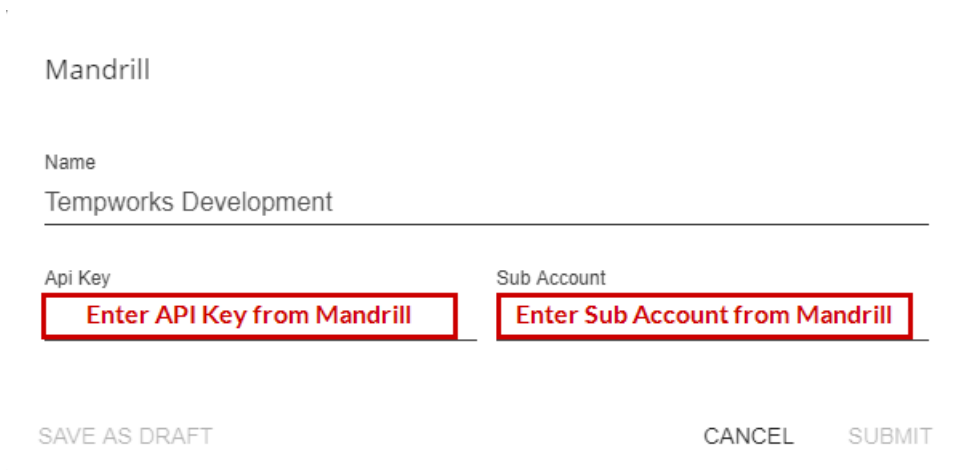
## Mailchimp (Mandrill)

To add your Mailchimp (Mandrill) account information:

- Navigate to System Settings > System Email > Providers
- Select the "+" to add a provider
- Select "Mandrill"



- Enter the following information

A screenshot of a form for configuring a Mandrill account. The form has a title "Mandrill" and a "Name" field containing "Tempworks Development". Below this are two fields: "Api Key" and "Sub Account". Both fields contain red text: "Enter API Key from Mandrill" and "Enter Sub Account from Mandrill" respectively. At the bottom of the form are three buttons: "SAVE AS DRAFT", "CANCEL", and "SUBMIT".

- Account Name - Identifier that will make it easier for users to know what to choose
- API key - From Mailchimp (Mandrill)
- Sub Account - From Mailchimp (Mandrill)
- Select "Submit"
- Now when a user goes to add their email under user settings, they will be able to pick the Mailchimp

Select a provider...



Tempworks  
Development  
Mandrill



Other  
SMTP



(Mandrill) settings you already set up:

CANCEL

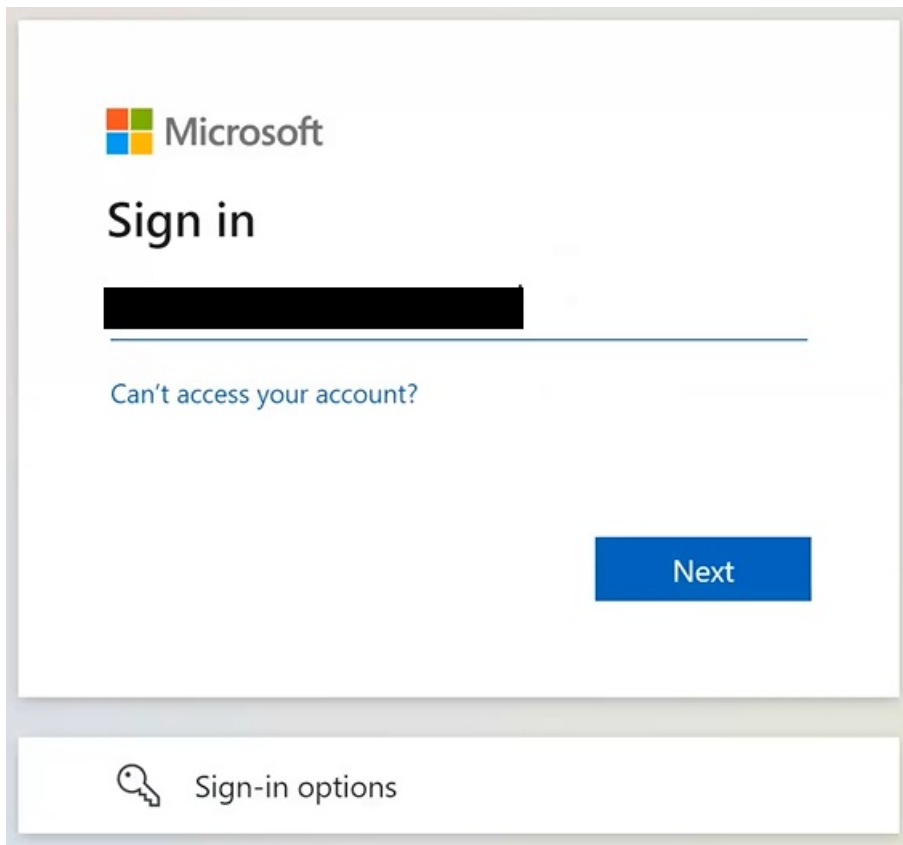
- They will then be able to add their email address from their Mailchimp (Mandrill) account and have the settings populate for them.

## Microsoft 365

To add your Microsoft 365 account information:

**\*Note\*** If you are planning on using a Microsoft 365 email for Mass Mailing in Beyond, it is recommended that a separate "No-Reply" Microsoft account is used so that personal email addresses are not being used. For example, no-reply@staffingcompany.com.

- Navigate to System Settings > System Email > Providers
- Select the "+" to add a provider
- Select "Microsoft 365"
- A new browser tab will open, directing you to log in using your Microsoft credentials to complete the link between Microsoft and Beyond:



- Once the connection has been established, the browser tab will close and you will be navigated back to the Beyond Mass Email tab, specifically the "Mass Email Account" window.
- Within the "Mass Email Account" window, enter the following:
  - **Account Name (Required)** - The name of the email account being added.
  - **Reply-to Email** - This is optional if you would like a different email for the recipient 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.
  - **Description (Required)** - A description for the type of email account being added.
  - **Teams** - Select the team that should have access to this email (Check out [Beyond - Creating & Managing Service Rep Teams](#) for more information)

**\*Note\*** Before setting up a Microsoft 365 email account for mass emailing in Beyond, please review the Microsoft Exchange Sending/Receiving limits which can be found [here](#) to verify that the email address being used is able to adequately send/receive the number of emails expected.

## Mass Email Account



Review Microsoft Exchange Online limitations before setting up a mass email account. If they are not equipped to handle the expected volume of mass emails, consider using another provider, such as Mandrill. [Learn more](#)

\* Account Name

Sender Name

[Redacted]

Default registered email display name that appears on outgoing email and in recipient inbox

\* Sender Email

[Redacted]



Reply-to Email

\_\_\_\_\_

Default Signature

\_\_\_\_\_



\* Description

\_\_\_\_\_

Teams

\_\_\_\_\_



SAVE AS DRAFT

CANCEL SUBMIT

**\*Note\*** Please keep the following in mind when creating a Microsoft 365 email account:

- The "Sender Name" field is unable to be edited and is the name that is stored within your Microsoft account.
- The "Sender Email" field prefills with the email address that is registered with Microsoft.

For the "Sender Email" field specifically, if you have another registered email address with the same Microsoft 365 account, you can enter that new email address within this field and test to verify that the email address directs as intended with the registered Microsoft 365 account.

Also, if the default registered email address is changed, the "Sender Name" will no longer be auto populated as the "Sender Name" is always linked to the default registered email address. Therefore, you would need to delete the account and create a new one, using the email address tied to the display name that you would expect.

Sender Email

### Email Account

\* Account Name  
New M365

Sender Name  
[REDACTED]

\* Sender Email  
[REDACTED] TEST

Default registered email display name that appears on outgoing email and in recipient inbox This email must be verified. Click "TEST" to send test email.

Reply-to Email  
\_\_\_\_\_

Default Signature  
\_\_\_\_\_

\* Description  
for testing

SAVE AS DRAFT CANCEL SUBMIT

Once "Test" is selected, a test email will be sent to the email address entered if the entered email address aligns with the Microsoft Account:

Hello

Congratulations! Your Microsoft 365 sender email is verified and can be used to send emails. To begin using your email account, complete the setup in Beyond by marking "I received the test email" and clicking "Submit."

Sincerely,

Your TempWorks Team

If the test email is received, navigate back to the "Email Account" window within Beyond and select the "I received the test email" box and select "Submit":

### Email Account

\* Account Name  
New M365

Sender Name  
[REDACTED]

\* Sender Email  
[REDACTED] X C

Default registered email display name that appears on outgoing email and in recipient inbox Email queued to be sent to [REDACTED] Expect to see it in your inbox soon.

\* I received the test email

Reply-to Email  
\_\_\_\_\_

Default Signature  
\_\_\_\_\_

\* Description  
for testing

SAVE AS DRAFT CANCEL SUBMIT

If the test email was not received, simply select the "Revert" option to the right of the "Sender Email" to automatically re-apply the original Microsoft 365 email address:

Sender Email

Email Account

\* Account Name  
New M365

Sender Name [Redacted] \* Sender Email [Redacted] Reset to default registered email


Reply-to Email [Redacted] Default Signature [Redacted]


\* Description  
for testing

SAVE AS DRAFT CANCEL SUBMIT

- Once all of the information has been entered/verified, select "Submit" to complete the Microsoft 365 email setup process.

**\*Note\*** Microsoft may require the re-authorization of the email account that has been added to Beyond. If this occurs, you will see a banner within the Microsoft 365 email card with an "Authorize" button:

 Demo

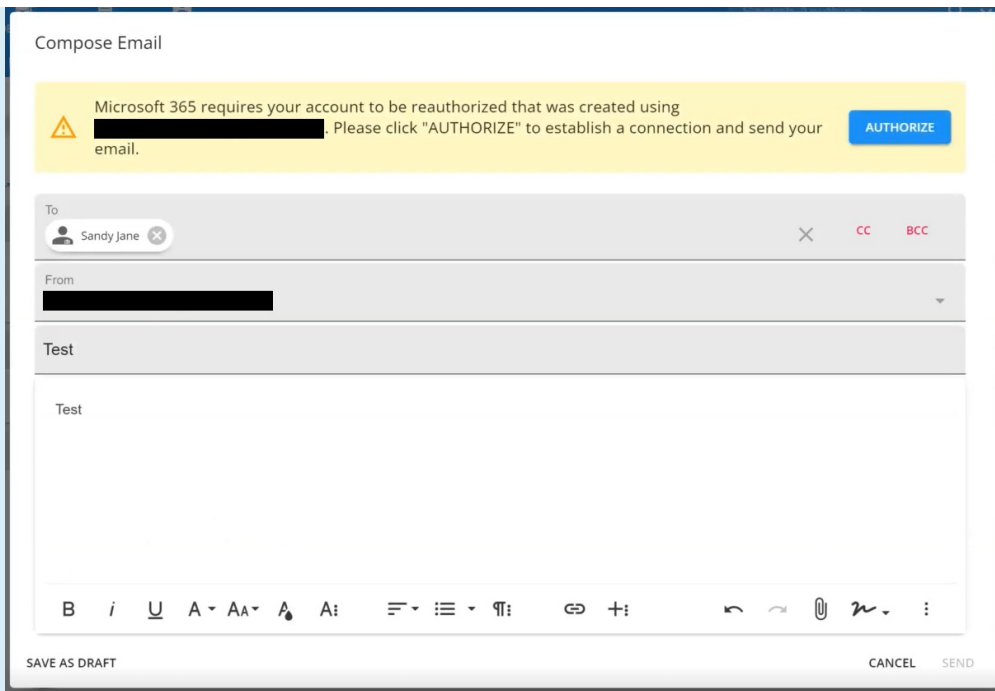
 Microsoft 365 requires your account to be reauthorized. Please click "AUTHORIZE" to establish a connection and continue using your email account. [AUTHORIZE](#)

Description  
**Demo**

Sender Email [Redacted] Reply-to Email [Redacted]

[EDIT](#) [TEST](#) [DELETE](#)


You will also see the banner when attempting to send an email within Beyond while utilizing the affected Microsoft 365 email address:

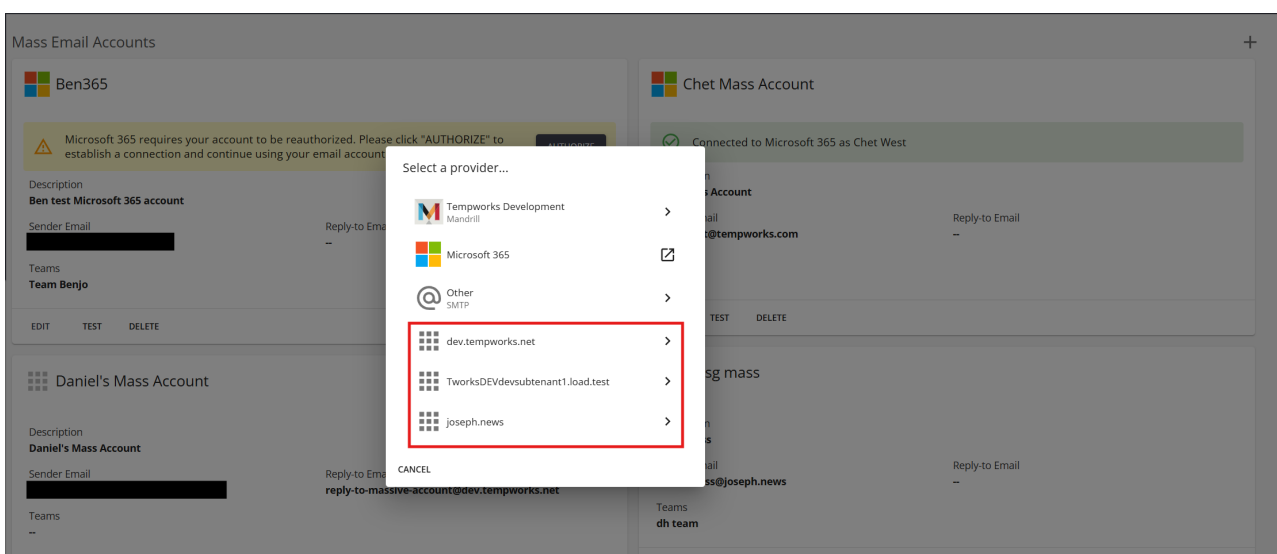


Selecting "Authorize" will open a new browser tab where you will need to log in with your Microsoft account credentials which will re-establish the link between Microsoft and Beyond.

## Registered Domain (Notification Service)

If you are utilizing the [Notification Service](#), you will need to select a Registered Domain when setting up your mass mailer.

- Navigate to System Settings > System Email > Mass Accounts
- Select the "+" to add an account
- Select one of your Registered Domains, indicated by the  to the left of the email address:



Complete the setup by adding the required information and select "Submit" once complete:

### Mass Email Account

**\* Account Name**

Account Name is required.

Sender Name **\* Sender Email**

Name that appears on outgoing email and in recipient inbox **Sender Email is required.**

Reply-to Email Default Signature

**\* Description**

Description is required.

Teams

BCC on Emails

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**\*Note\*** In the event you are going to be utilizing the [Notification Service within WebCenter](#), when setting up the Mass Mailer account within Beyond, you must also ensure the "Teams" field is populated with a Service Rep Team that contains your WebCenter Product Instance.

1. Navigate to B Menu > System Settings > Service Rep Teams > "+ Add Service Rep Team":

Name ↑	Hierarchy Level	Owner
Filter...	Filter...	Filter...
-rest2 5/12 edit	System	Diyana Bodurova
2Team Alim at System Level	System	Anna Dourgarian
APITeamUpdate	System	zachary.johnson
Automation Team (Do not del...	QAAutomation	BeyondQA 01Dev
Branch Managers	System	Nicole Neville
Carter SR Team	System	Carter Schuurmans
Danny's Team	System	Yordenka Gidova

2. Within the "Service Rep Team" window, enter the name and select the intended hierarchy of the Service Rep Team:

Service Rep Team

\* Name  
Leandro Test NS

\* Hierarchy  
System

\* Owner  
joshua.kramer

Members (0) +

No members added yet

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3. Select the "+" to add members, search for "wc" and add the related WebCenter Product Instance as a member of the team:

Service Rep Team

\* Name  
Leandro Test NS

\* Hierarchy  
System

\* Owner  
joshua.kramer

Members (2) +

wc-Default (23271)  
 wc-HiTechQA (23276)

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4. Select "Submit" to finalize the creation of the Service Rep Team.
5. When adding a Mass Mailer account utilizing your domain, within the "Teams" field, select the newly created Service Rep Team:

## Leandro NS Test

Description

**This is a test**

Sender Email

**leandrotest@dev.tempworks.net**

Reply-to Email

**leandrotest@dev.tempworks.net**

Teams

**Leandro Test NS**

EDIT

TEST

DELETE

# Signatures

Signatures under system settings allow you to set up different signatures that all users can use. These signatures can be set up as defaults on the system level email accounts or just used as generic templates for new users to copy and edit.

## To Set Up a System Signature

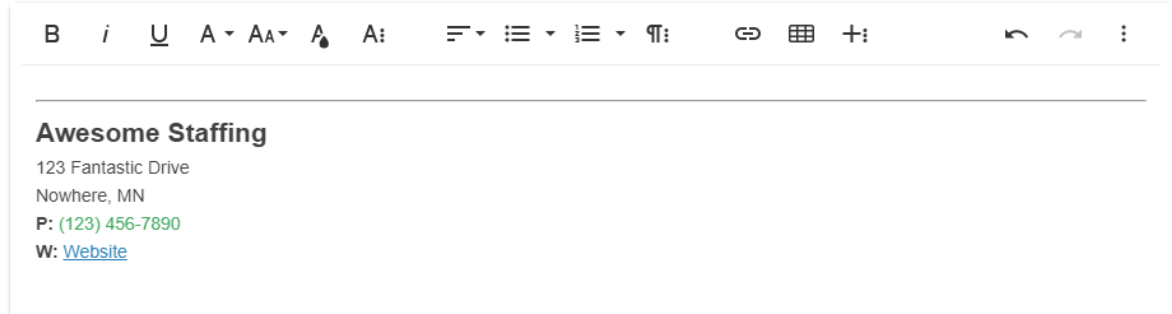
- Navigate to System Settings Settings > System Email > Signatures
- Select the "+" in the upper right to add a new signature
- Enter a name for your signature (this will be used for your team to select from when they want to insert a signature)
- Copy and paste or type in your signature

## Email Signature

Name

Example System Signature

Signature




The screenshot shows an email signature editor with a rich text toolbar at the top. The toolbar includes buttons for Bold (B), Italic (i), Underline (U), text color (A with a color swatch), background color (A with a color swatch), bulleted list, numbered list, link, table, and insert. Below the toolbar, the signature text is displayed: **Awesome Staffing**, 123 Fantastic Drive, Nowhere, MN, P: (123) 456-7890, and W: [Website](#).

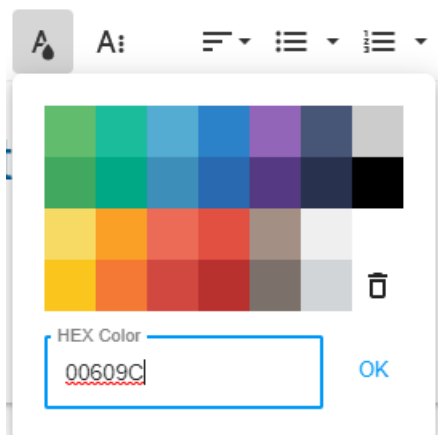
SAVE AS DRAFT

CANCEL

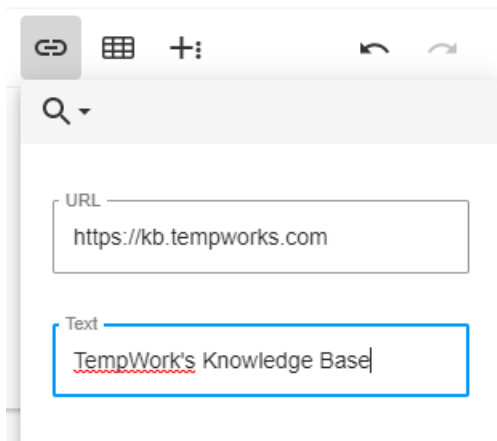
SUBMIT

### Email Signature Tips & Tricks:

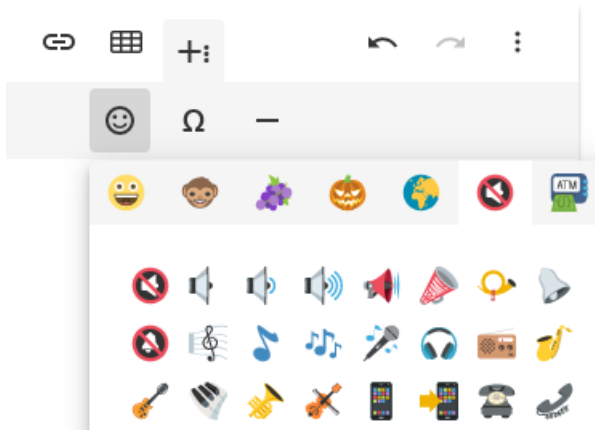
- Selecting the text color button (  ) allows you to pick from default color palette or use the Hex color code to add your own color to match your branding.



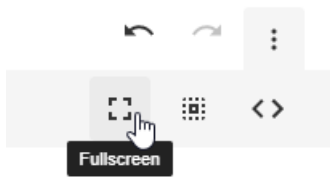
- Use the Insert a Link option to include a link to your company's website in your signature.



- 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 saavy) use HTML to format your signature.



## Related Articles

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