

# How to check the email configuration in the system

<b>1. Introduction</b>	<b>2</b>
Purpose of Email Configuration	2
Prerequisites	2
<b>2. Email Server Information</b>	<b>2</b>
SMTP Server	2
Port Number	2
Security Settings (SSL/TLS)	2
Security Settings (SSL/TLS)	3
<b>3. Office 365 Email Configuration</b>	<b>3</b>
Office 365 SMTP Server Information	3
OrangeHRM Email Configuration Steps for Office 365	3
Troubleshooting Office 365 Configuration	4
1. Authentication Failure:	4
2. Connection Issues:	4
3. Security Settings:	4
1. Are there any specific considerations for Office 365?	5
2. Can I use a custom domain with Office 365 configuration?	5
<b>4. OrangeHRM Email Configuration Steps</b>	<b>5</b>
Accessing OrangeHRM Admin Panel	5
Navigating to Email Configuration	5
General Settings	5
<b>SMTP Configuration</b>	<b>6</b>
Configure additional SMTP settings:	6
Testing Email Configuration	6
<b>5. Migration Checklist</b>	<b>7</b>
Update DNS Records	7
Whitelist Email Server IP Address	7
Whitelisting for Outbound Emails:	7
Update SPF Record	8
Update SPF (Sender Policy Framework) Record:	8
Test Email Configuration	8
1. Internal Testing:	8
2. External Testing:	8
Monitor Email Delivery	8
1. Monitoring:	8
Update Email Signatures	8

# 1. Introduction

## Purpose of Email Configuration

Email configuration in OrangeHRM allows the system to send important notifications, alerts, and communication to users. This documentation provides step-by-step instructions on configuring the email settings within OrangeHRM.

## Prerequisites

Before proceeding with the email configuration, ensure that you have the following information:

- SMTP Server Address
- Port Number
- Security Settings (SSL/TLS)

# 2. Email Server Information

## SMTP Server

- Server Address: [Your SMTP Server Address]
- Example: smtp.yourmailprovider.com

## Port Number

- Port: [Your SMTP Port Number]
- Example: 587 (for TLS), 465 (for SSL)

## Security Settings (SSL/TLS)

- Security: [SSL/TLS]
- Example: STARTTLS for TLS, SSL/TLS for SSL

## Security Settings (SSL/TLS)

- Security: [SSL/TLS]
- Example: STARTTLS for TLS, SSL/TLS for SSL

## 3. Office 365 Email Configuration

### Office 365 SMTP Server Information

- Server Address: smtp.office365.com
- Port: 587
- Security: STARTTLS

### OrangeHRM Email Configuration Steps for Office 365

1. Follow the steps in Section 4 to access the OrangeHRM Admin Panel.
2. Navigate to "**Configuration**" and select "**Email Configuration**".
3. In the "**General Settings**" section, set the following:
  - "**Sending Method**": SMTP
  - "**SMTP Host**": smtp.office365.com
  - "**SMTP Port**": 587
  - "**SMTP Username**": Your Office 365 email address
  - "**SMTP Password**": Your Office 365 email password
4. In the "SMTP Secure Connection" section:
  - "**User Secure Connection**": TLS
5. In the Use SMTP Authentication
  - "SMTP Authentication ": Yes
6. Scroll down and click "**Send Test Email**". Then type a valid email address and click "**Save**" Button

Sender Email*	hrms@ohrmlive.com	Sender Name	Ohrm Demo
<hr/>			
Sending Method*	SMTP		
<hr/>			
SMTP Host*	smtp.office365.com	SMTP Port*	587
<hr/>			
Use SMTP Authentication	<input type="radio"/> No <input checked="" type="radio"/> Yes		
SMTP User*	hrms@ohrmlive.com	SMTP Password*	*****
<hr/>			
Use Secure Connection	<input type="radio"/> No <input type="radio"/> SSL <input checked="" type="radio"/> TLS		
<input type="checkbox"/> Send Test Email			
<hr/>			
*Required field			

## Troubleshooting Office 365 Configuration

If you encounter issues with Office 365 configuration, consider the following:

### 1. Authentication Failure:

Ensure the correctness of your Office 365 email address and password.

### 2. Connection Issues:

Confirm that the SMTP server address is set to **smtp.office365.com** and the port is set to **587**.

### 3. Security Settings:

Check that the security setting is configured as **STARTTLS**.

## FAQs for Office 365 Configuration

### 1. Are there any specific considerations for Office 365?

Yes, use the provided SMTP server address (smtp.office365.com) and set the security to STARTTLS with port 587.

### 2. Can I use a custom domain with Office 365 configuration?

Yes, you can use a custom domain for your Office 365 email address.

## 4. OrangeHRM Email Configuration Steps

### Accessing OrangeHRM Admin Panel

1. Open your web browser and navigate to the OrangeHRM Admin Panel.
2. Log in with your System administrator credentials.

### Navigating to Email Configuration

1. In the Admin Panel, go to "Configuration".
2. Select "Email Configuration" from the menu.

### General Settings

1. Set the **"Mail Protocol"** to **"SMTP"**.
2. Fill in the following information:
  - **"SMTP Host"**: [Your SMTP Server Address]
  - **"SMTP Port"**: [Your SMTP Port Number]
  - **"SMTP Username"**: [Your SMTP Username]
  - **"SMTP Password"**: [Your SMTP Password]

# SMTP Configuration

Configure additional SMTP settings:

- "SMTP Security": [SSL/TLS]
- "SMTP Authentication ": Yes

## Testing Email Configuration

1. Scroll down to the bottom of the page.
2. Click "**Test Configuration**".
3. Enter a test email address.
4. Click "**Send Test Email**".

Sender Email*	Sender Name OrangeHRM (Pvt) Ltd(Bi Master Data - Demo)
Sending Method* SMTP	
SMTP Host*	SMTP Port*
Use SMTP Authentication <input checked="" type="radio"/> No <input type="radio"/> Yes	
Use Secure Connection <input type="radio"/> No <input type="radio"/> SSL <input type="radio"/> TLS	
<input type="checkbox"/> Send Test Email	
*Required field	
<input type="button" value="RESET"/> <input type="button" value="SAVE"/>	

## 5. Migration Checklist

### Update DNS Records

1. **MX Record:** Ensure that the MX (Mail Exchange) records for your domain are updated to point to the new email server. This is crucial for directing incoming emails to the correct server.

### Whitelist Email Server IP Address

#### Whitelisting for Outbound Emails:

- Contact the email service provider or IT department responsible for email security.
- Provide the new IP address of your email server to be whitelisted.

- Whitelisting ensures that emails sent from your server are not marked as spam or blocked.

## Update SPF Record

### Update SPF (Sender Policy Framework) Record:

- If applicable, update your SPF record in DNS to include the new email server's IP address.
- This helps prevent email spoofing and improves email deliverability.

## Test Email Configuration

### 1. Internal Testing:

- Conduct internal testing to ensure that the new email server is properly configured.
- Test sending and receiving emails to and from internal addresses.

### 2. External Testing:

- Send test emails to external email addresses to verify that emails are reaching recipients without issues.

## Monitor Email Delivery

### 1. Monitoring:

- Monitor email delivery and check for any issues.
- Implement logging and monitoring tools to track email traffic and identify potential problems.

## Update Email Signatures

### 1. Update Email Signatures:

- Remind users to update their email signatures to reflect any changes, such as a new email address or company information.