## % knowledgeowl

## **Configure SMTP for reader emails**

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Readers may receive three types of emails from KnowledgeOwl:

- **Reader welcome emails:** system-generated; sent when a reader is granted access to your knowledge base to send a welcome message with their login information
- Password reset emails: system-generated; sent when the reader has requested a password reset or an administrator has reset their password
- Subscription notification emails: optional; only sent when Subscriptions have been enabled + the reader has opted in to subscriptions + there is new/updated content to notify them about

The two system-generated reader emails (reader welcome and password reset) are sent from support@knowledgeowl.com. You can change the email address these are sent from, but sometimes that arrangement will flag the emails as spam. To ensure delivery of your reader welcome and password reset emails, you can configure your reader emails to use your own or a third-party SMTP email server.



To use this option, you must have at least one SMTP service defined in Your Account > SMTP. See SMTP for more information on configuring SMTP services.

Once you're sure an SMTP service exists that you can use:

- 1. Click on your profile icon/name in the upper right.
- 2. Select Readers from the dropdown to access the Readers area of your account.
- 3. Open the Settings tab.
- 4. Scroll to the SMTP Settings section.
- 5. Select the SMTP service you'd like to use in the **Custom SMTP** dropdown. If there are no options, this means no SMTP service has been configured for your account. See SMTP for more information on configuring these services. (You'll likely need help from an IT admin!)

## **SMTP** Settings

Use your own email service v	a SMTP to send reader emails. You can add an SMTP service by going to <u>Your Account &gt; SMTP</u>
Enable SMTP Custom SMTP	<ul> <li>□ Use SMTP to send all reader emails</li> <li>Azure OAuth2 </li> <li>✓ Send Test Email</li> <li>Save</li> </ul>

- 6. Once you've selected the **Custom SMTP** you'd like to use, click the **Send Test Email** button. This allows you to send a test email to confirm that the SMTP is properly working. It allows you to be sure all's well before you turn things on.
- 7. This will open a pop-up where you can specify the email address you'd like to send the test to. Enter the test recipient email address and click **Send Email**.

Send Test Email Using SMTP	$\times$
<ol> <li>Send a test email containing a fake reader invite to confirm your settings are correct.</li> </ol>	SMTP
Test recipient email address: .com	
Close	Send Email

- 8. If anything is improperly configured, you'll get an error message. This should be one of two types:
  - **Basic validation:** we'll alert you if the email address you've entered doesn't follow standard email address conventions or if any fields have been left blank.
  - SMTP provider validation: if the error comes from the call to your SMTP provider, we'll return the error message they provide
- 9. If everything is properly configured, you'll see a confirmation message:

Email sent successfully!	×
	ОК

10. You should receive a sample reader welcome email containing some fake info. It should look something like

Send From Name <sendfromaddress@email.com>

to me \*

Hi Joe!

You have been invited to the following knowledge bases:

Fake Test Knowledge Base

Fake Test Knowledge Base Login

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You may log in with the following credentials:

Username: testing@noreply.com

Password: 12345abcde

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11. Once your test email looks good, check the Enable SMTP box to Use SMTP to send all reader emails.

SMTP Settings					
Us	se your own email service via	a SMTP to send reader emails. You can add an SMTP service by going to <u>Your Account &gt; SMTP</u>			
	Enable SMTP	✓ Use SMTP to send all reader emails			
	Custom SMTP	Azure OAuth2 ~			
		Send Test Email			
		Save			
Enable SMTP and save					

12. Save your changes.

All reader welcome emails and reader password reset emails will now send using the SMTP details you provided. See Customize your reader password reset emails and Customize your reader welcome emails for more information on further customizing those emails.

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