Setting Up a Company to Use SedonaEmail

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Basic Setup

1. Support ticket created for activation of SedonaEmail

1. Customer generated

1. Implementations Generated

1. Michelle sends them the getting started materials.

1. Wait for first response from customer.

1. Setup the Sub Account for the new company.

1. All SedonaEmail customers need to be attached to a sub-account. The subaccount name is not important, but it needs to be unique.

1. Add the sub-account in Mandrill

1. Add the domain in Mandrill

1. Generate the domain validation email

1. The customer needs to forward the email back

1. Click on the link to complete the process

1. Be sure that the target knows it is coming and what they need to do. Had a number of customers try to create a MailChimp account!

1. Cycle through waiting for them to make changes to the DKIM and SPF until they get it right. You may need to send the error messages with information on what they are doing wrong and how to correct it.

1. Once you have the three green checks in Mandrill, you can make the changes to their setup.

1. Use the script to make the database changes as needed. Be sure to update all company databases that will use SedonaEmail with the correct information.

Look Out For

Company in conversions installs on a conversion database for testing and the go live database is not updated. Need to be sure to update the conversion company and the mastersetup company.

Some domains will not make the changes needed. These customers will always use the generic email address. You still need to setup a separate sub-account!

SQL Script

Declare @FromEmail NVarChar(100),

@FromName NVarChar(100),

@DefaultSubject NVarChar (100),

@SubAccount NVarChar(100)

/*

These lines will give you the existing settings

*/

Select * from EM_Setup

Select * from EM_Template

Select * from SY_AlternateAddress

Select * from SedonaMaster.dbo.Company

```
/*

************************************

Setting the values

************************************

Note:

In all cases, setting the entry to a blank does not change the existing value.

*/



Set @SubAccount = ''  --Which sub account

Set @FromName = '' --Put your Person/Company Name From Info between the quotes

Set @FromEmail = ''   --Default?

/* Put the email address of who the email comes from and who they will reply to.

If you enter Default, the system will use the NoReply address.



Note: There is currently only a single selection for both from and reply-to */



Set @DefaultSubject =  ''  --None?

-- If you enter None, subject will show as default subject:> Invoice #12345



If @FromEmail = 'Default' Set @FromEmail = 'NoReply@SecurityServicesBilling.Com'



If @DefaultSubject <> ''

  Begin

  If @DefaultSubject = 'None'
```

```
   Set @DefaultSubject = 'Invoice #{{default_value}}'

   Else

    Set @DefaultSubject = @DefaultSubject + ' Invoice #{{default_value}}'

  End



Update EM_Setup

Set Message_Text_Interval_Milliseconds = 0,

Account_Name = Case When @SubAccount = '' then EM.Account_Name else @SubAccount end

from EM_Setup EM



Update EM_Template

Set From_Email = Case When @FromEmail = '' then EM.From_Email Else @FromEmail end,

From_Name =  Case When @FromName = '' then EM.From_Name Else @FromName End,

Reply_To_Email =  Case When @FromEmail = '' then EM.From_Email Else @FromEmail end,

Default_Subject = Case When @DefaultSubject = '' then EM.Default_Subject Else @DefaultSubject End

From EM_Template EM

Where Name = 'Sedona Office Invoice Test'
```

https://login.mailchimp.com

Log In

Need a MailChimp account? Create an account

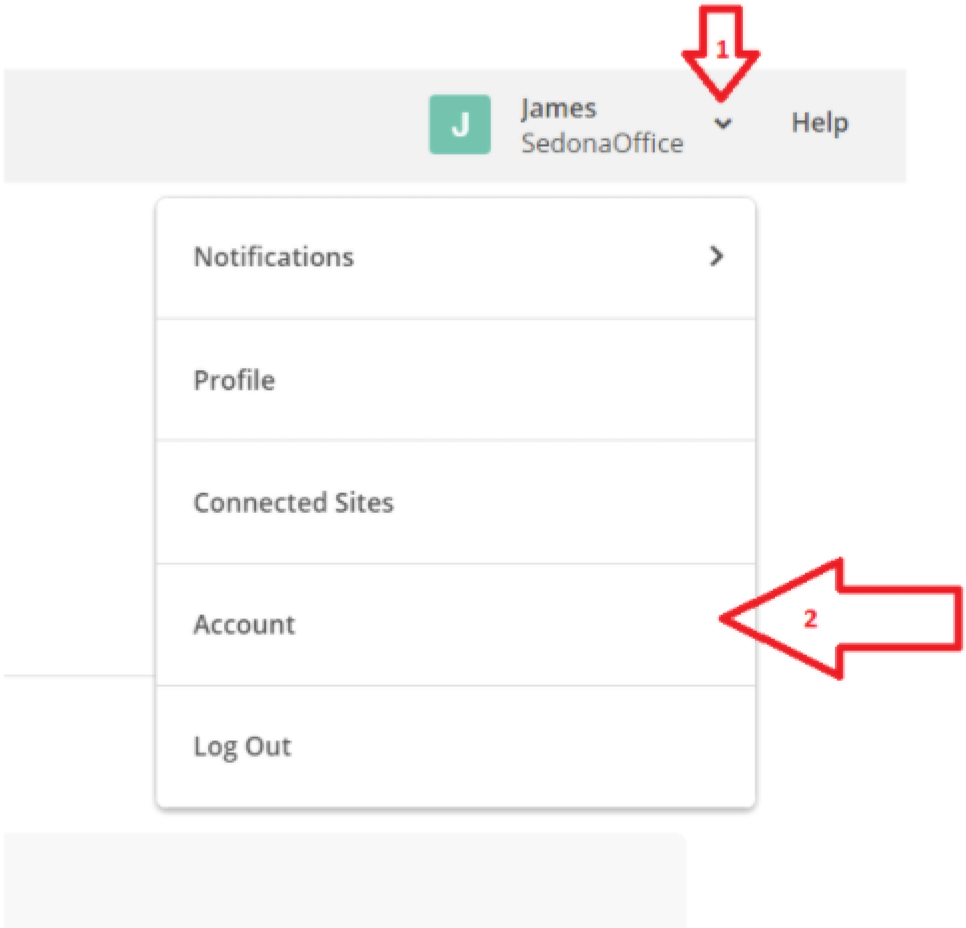
Username

SedonaOffice

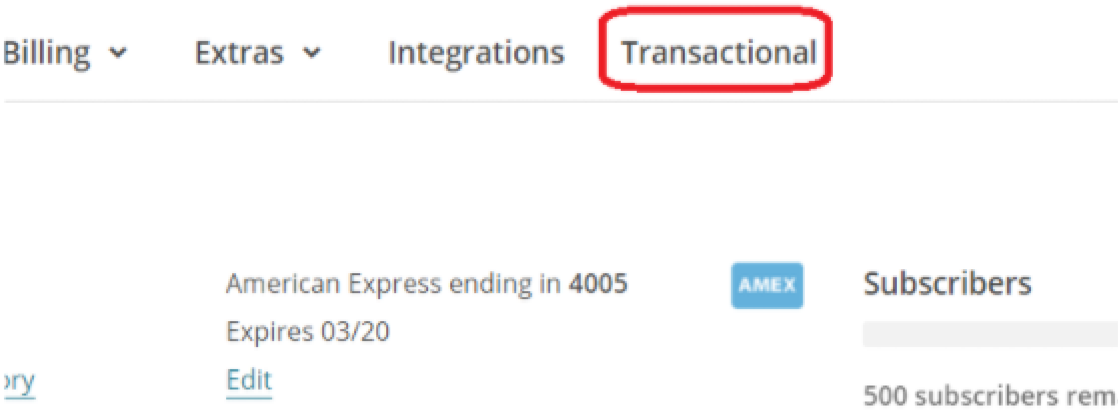
Password Show

•••••••••••••

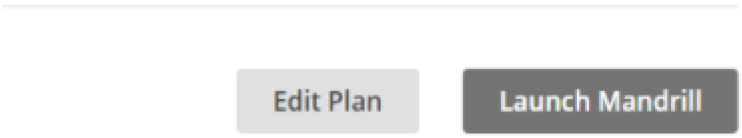
At time of production, pwd = Sed0n@office (Note: 0 is a zero)



Click the drop down arrow (1) and then select- account (2).

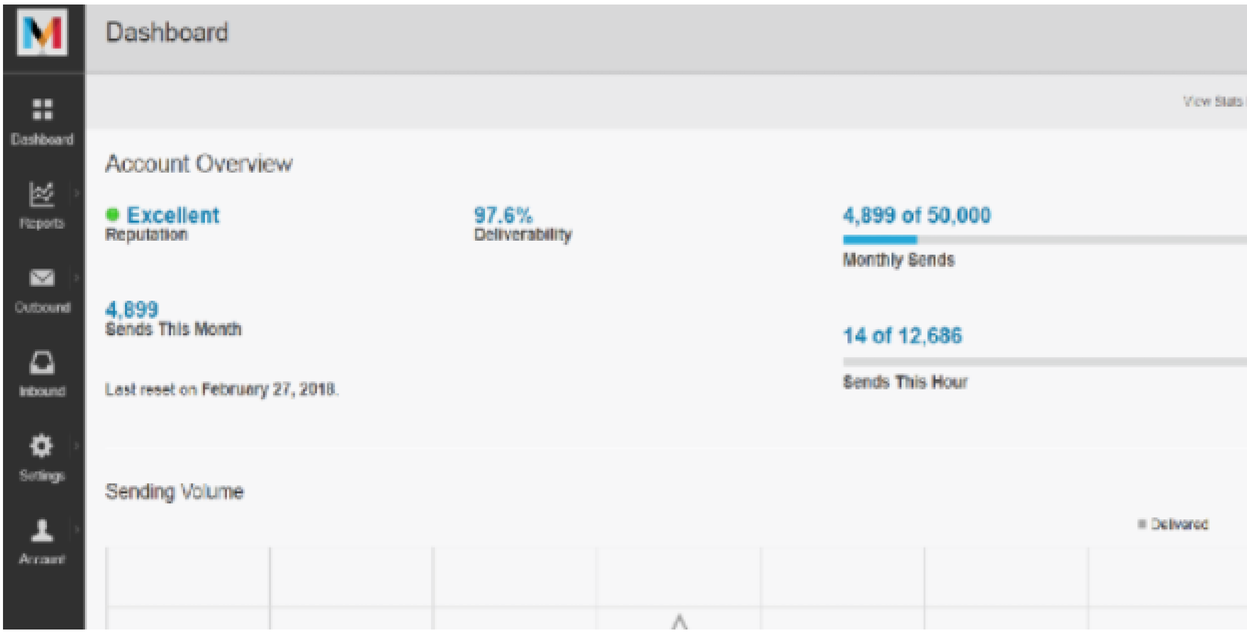


Choose Transactional.



Click “Launch Mandrill”

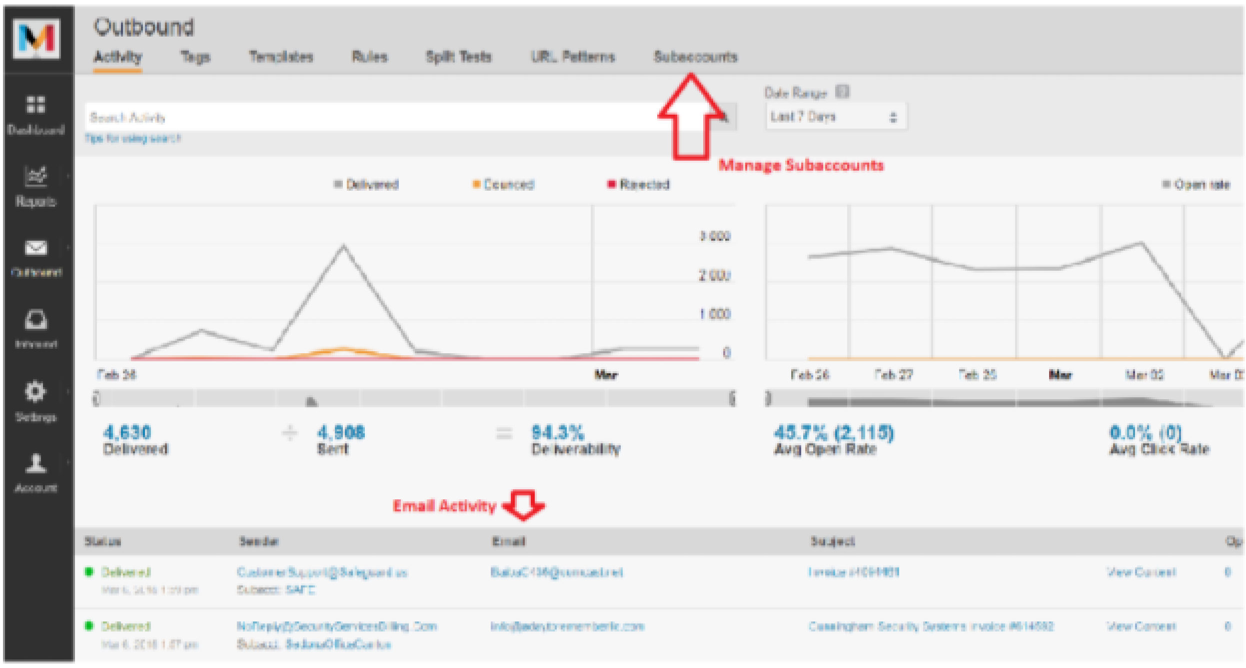
This will take you to the Dashboard.



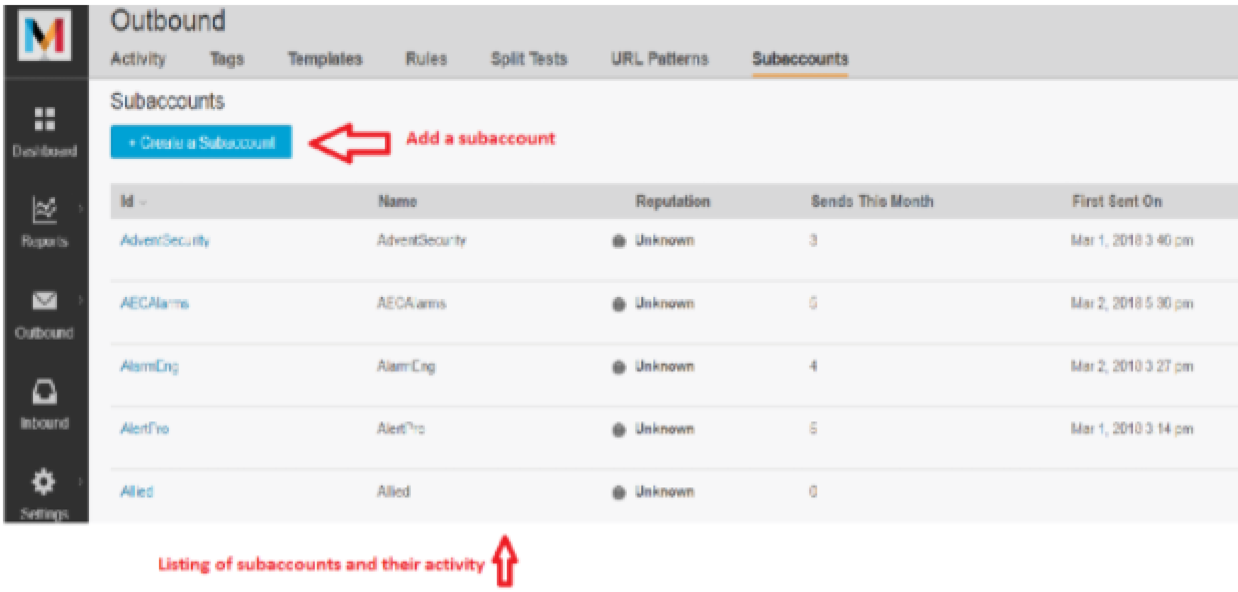
From the Dashboard you can manage the SedonaEmail accounts.

SubAccount Setup

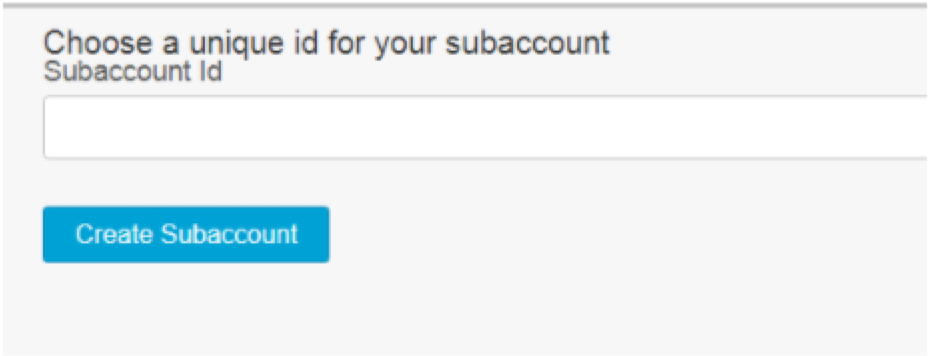
Click Outbound



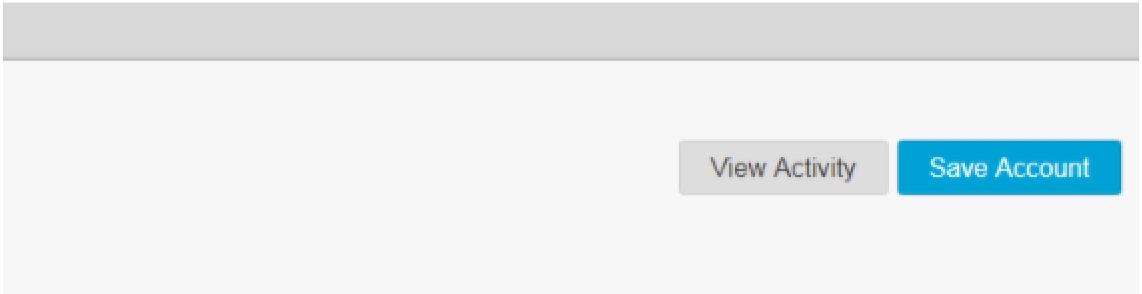
Click SubAccounts.



Click on Create a Subaccount.



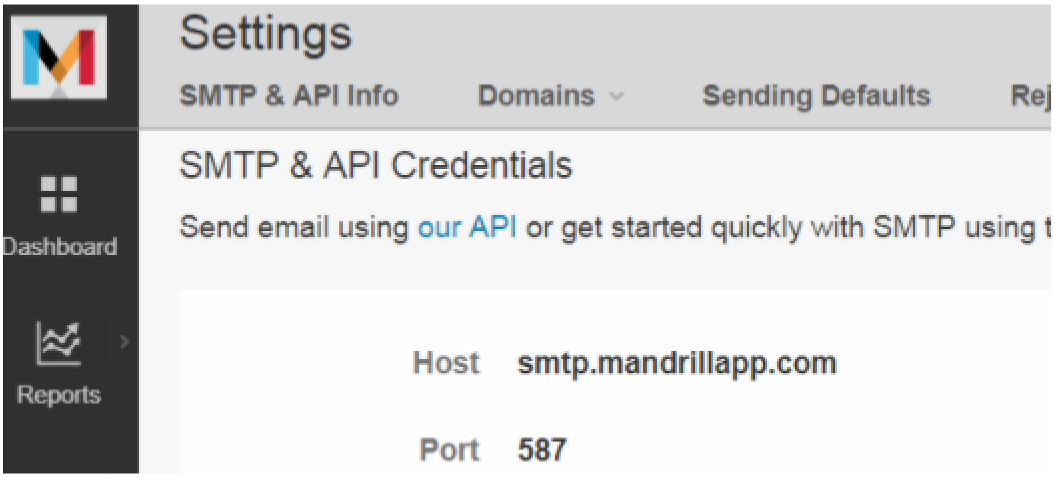
Enter the name of the new subaccount and click “Create SubAccount”



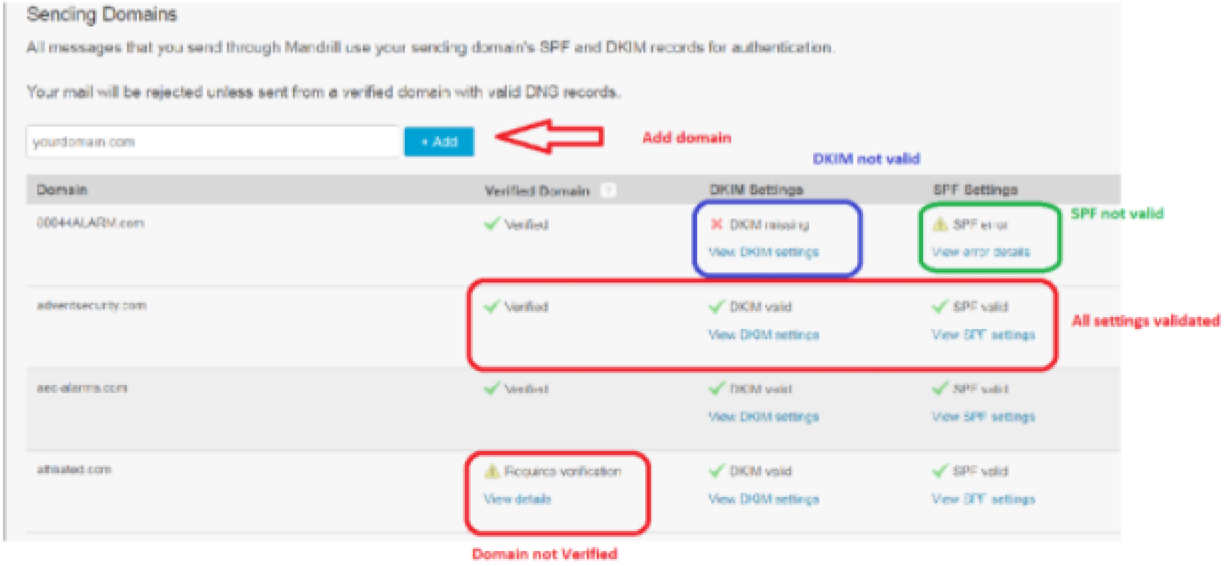
Click Save Account. The Subaccount will be created.

Domain Verification

From the Dashboard, click Settings.



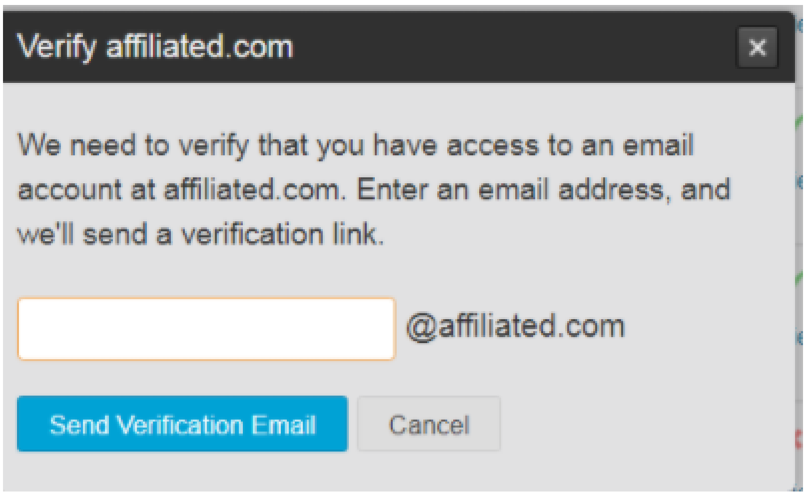
Click the Domains.



Add a domain by typing the name of the domain into the blank and click the “+ Add” button. If the domain is valid, it will be added to the list.

All three sections must pass testing for the Domain to be valid. Each item is verified separately, so they can do them all at the same time.

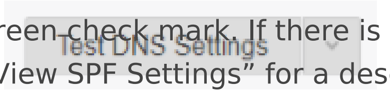
Verify Domain



If you click on view details, you are presented with a data entry dialogue. Enter the email address of the individual you want the verification email sent to. Note: the @affiliated.com is already provided!

When you click “Send Verification Email”, Mandrill sends an email to this address. The target person needs to forward this email back to you. Once you get the email (from the forward), open the item and click on the link provided. (Note: you must be signed in to Mandrill or you will be prompted to sign in.) Mandrill will show the message “Domain Verified”.

For the DKIM and SPF settings, the procedure is the same. Click -



Mandrill will reach out to the DNS server to inspect the items. If they pass, the entry will receive a green check mark. If there is an issue, a red X displays. You can click “View DKIM Settings” or “View SPF Settings” for a description of the problem and a suggestion for addressing. After the user has followed the suggestions, click again to see if the changes were successful. Once all three green check marks appear, the domain is validated.

Revision #1

Created Fri, Feb 26, 2021 9:28 PM by Phillip Ferraro

Updated Mon, Aug 2, 2021 7:33 PM by Phillip Ferraro