

How to Navigate to Email Account Page

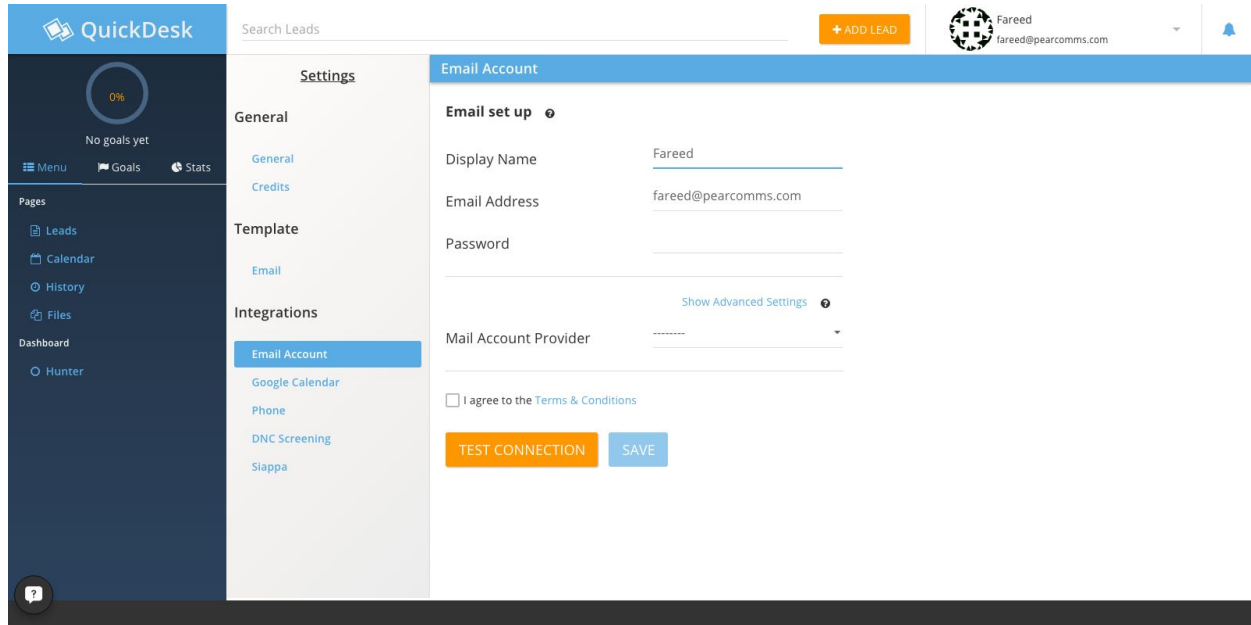
The screenshot shows the QuickDesk interface. On the left is a dark sidebar with navigation options: Menu, Goals, Stats, Pages (Leads, Calendar, History, Files), and Dashboard (Hunter). The main content area displays a table of Leads with columns: Name, Source, Type, Created Date, and Contact D. Two leads are listed: Ken Bay (Source: Self, Type: Person, Created Date: 2016/01/26, Contact D: +6512345) and Reed (Type: Person, Created Date: 2015/11/27, Contact D: +6587654). On the right, a user profile for Fareed (fareed@pearcomms.com) is shown with a dropdown menu containing Settings, Tour, User Guide, and Logout. A mouse cursor is pointing at the Settings option.

Name	Source	Type	Created Date	Contact D
Ken Bay	Self	Person	2016/01/26	+6512345
Reed		Person	2015/11/27	+6587654

1. Click on *Settings* from the dropdown menu on the top right side of the page.

The screenshot displays the QuickDesk application interface. On the left is a dark blue sidebar with the 'QuickDesk' logo at the top. Below the logo, there's a progress indicator showing '0%' and the text 'No goals yet'. Further down, there are sections for 'Pages' (Leads, Calendar, History, Files) and 'Dashboard' (Hunter). A search bar labeled 'Search Leads' is positioned at the top of the main content area. To its right is an orange '+ ADD LEAD' button. The user profile 'Fareed' with email 'fareed@pearcomms.com' and a version number 'v0.16.5' are visible in the top right corner. The main content area is divided into two parts: a 'Settings' sidebar on the left and an 'Account Info' section on the right. The 'Settings' sidebar has sections for 'General' (with 'General' and 'Credits' sub-items), 'Template' (with 'Email' sub-item), and 'Integrations' (with 'Email Account', 'Google Calendar', 'Phone', 'DNC Screening', and 'Slappa' sub-items). The 'Email Account' option is highlighted with a mouse cursor. The 'Account Info' section shows a table with two rows: 'Name' with value 'Fareed' and 'Email' with value 'fareed@pearcomms.com'.

2. Under the *Settings* sidebar, select *Integrations* > *Email Accounts*.



3. This is how the *Email Account* page looks like.

Setting up your Email Account

Email Account

Email set up ⓘ

Display Name

Email Address

Password

[Show Advanced Settings](#) ⓘ

Mail Account Provider

I agree to the [Terms & Conditions](#)

Enter your account *Email Address* and *Password*.

Note: The password here is your *email account password* and NOT your QuickDesk account password.

Email Account

Email set up ⓘ

Display Name

Email Address

Password

[Show Advanced Settings](#) ⓘ

Mail Account Provider

- ✓ -----
- Gmail**
- Yahoo
- Outlook
- Others

I agree to the [Terms & Conditions](#)

TEST CONNECTION **SAVE**

Select *Mail Account Provider* from the dropdown menu. There are 3 preconfigured account, namely *Gmail, Yahoo! And Outlook*.

Email Account

Email set up ⓘ

Display Name

Email Address

Password

[Hide Advanced Settings](#) ⓘ

Mail Account Provider

Server Name

Connection Security

Port

I agree to the [Terms & Conditions](#)

TEST CONNECTION

SAVE

Select *Others* from *Mail Account Provider* if you are not using any of the preconfigured Provider.

Email Account

Email set up ⓘ

Display Name

Email Address

Password

[Hide Advanced Settings](#) ⓘ

Mail Account Provider

Server Name

Connection Security

Port

I agree to the [Terms & Conditions](#)

TEST CONNECTION

SAVE


Click *Show Advanced Settings* to see more configuration settings.

Email Account

Email set up

Display Name	Fareed
Email Address	fareed@pearcomms.com
Password

[Hide Advanced Settings](#) 

Mail Account Provider	Others 
Server Name	custom-smtp.domain.com
Connection Security	<div style="border: 1px solid #ccc; padding: 5px;"><ul style="list-style-type: none">✓ SSL/TLS<li style="background-color: #007bff; color: white;">STARTTLSNone</div>
Port	

I agree to the [Terms & Conditions](#)

TEST CONNECTION

SAVE

Select the security standard that your email provider uses from the *Connection Security* dropdown. If you are not sure, please consult your email provider.

Email Account

Email set up ⓘ

Display Name	Fareed
Email Address	fareed@quickdesk.io
Password

[Hide Advanced Settings](#) ⓘ

Mail Account Provider	Gmail
Server Name	smtp.gmail.com
Connection Security	SSL/TLS
Port	465

I agree to the Terms & Conditions

TEST CONNECTION

SAVE

Advanced settings information

If you choose a custom email account provider, the following fields must be filled in

- **Server name**, the name of your outgoing email server (SMTP server), such as smtp.example.com
- **Connection security**, the security standard your email provider uses for making sure your emails are sent out safely and securely. If you are not sure which type is used, please ask your email account provider.
- **Port**, the port your email server use to send out emails, contact your email host or read their documentation to make sure which ports they use. Most common ports for secure SMTP are 465 or 25 or 587, 2526

Hover over the (?) tooltip to show additional information.

Email Account

Email set up ⓘ

Display Name

Email Address

Password

[Show Advanced Settings](#) ⓘ

Mail Account Provider

I agree to the [Terms & Conditions](#)

Test Connection Success

To test your settings, check the *Terms & Conditions* box and click *Test Connection*. If everything is configured correctly, it will return “*Test Connection Success*” message. Click *Save* and your *Email Account* is now configured.

Email Account

Email set up ⓘ

Display Name

Email Address

Password

[Show Advanced Settings](#) ⓘ

Mail Account Provider

I agree to the [Terms & Conditions](#)

TEST CONNECTION

SAVE

Login failure (E02)

NOTE: Gmail requires that you allow QuickDesk to use your email account. An alert email is sent to your email inbox when clicking "test connection". Please check the email and ALLOW for QuickDesk to use your email account.

An example of a failed login attempt. Please read the error message or check out the FAQ section titled *"Email Account Provider Blocking Access"* for further details.

FAQ

Login Failure

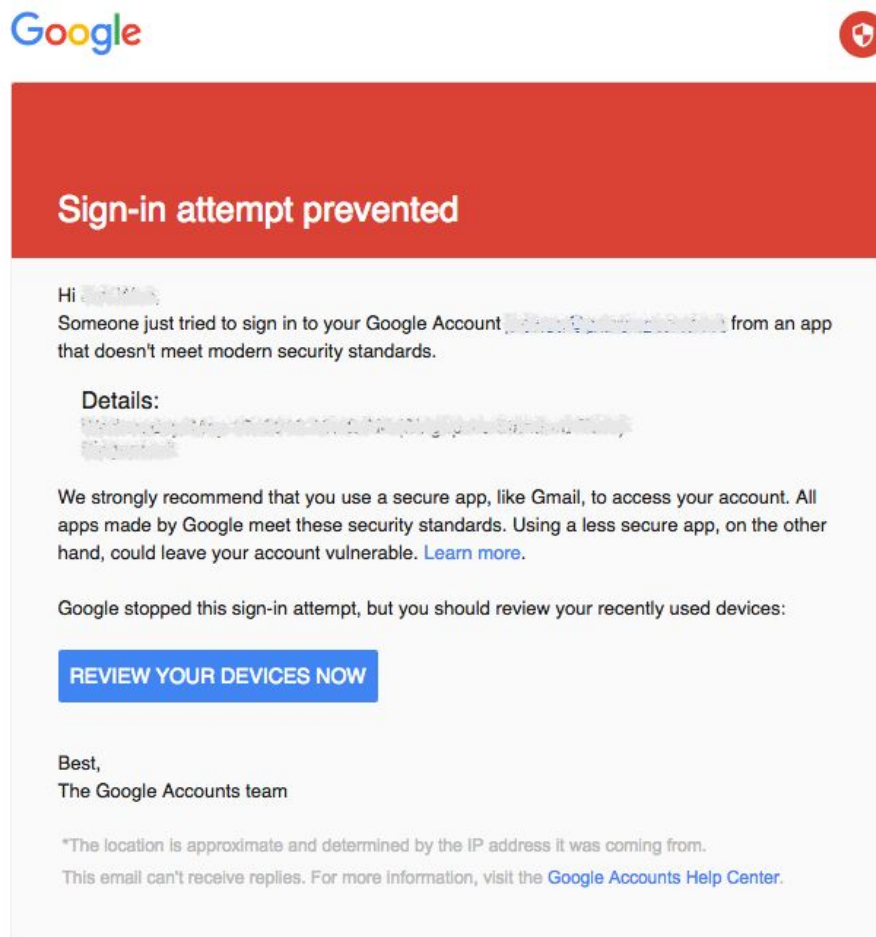
If you get the error message “*E02: Login Failure*”, ensure that you are inputting the password for your email address account and NOT the password for your Quickdesk account.

Email Account Provider Blocking Access

It is quite common for *Email Account Providers* to block outside resources from using their email server to send out emails.

Please see below for some examples.

Gmail



You received this mandatory email service announcement to update you about important changes to your Google product or account.
© 2016 Google Inc., 1600 Amphitheatre Parkway, Mountain View, CA 94043, USA

An automated email sent to your Gmail account preventing sign-in when setting up your *Email Account* on Quickdesk.

Connected apps & sites

Keep track of which apps and sites you have approved to connect to your account, and remove ones you no longer use or trust.

Apps connected to your account

Make sure you still use these apps and want to keep them connected.

[MANAGE APPS](#)

Saved passwords

You have no synced passwords.

[LEARN MORE](#)

Allow less secure apps: ON

Some non-Google apps and devices use less secure sign-in technology, which could leave your account vulnerable. You can turn off access for these apps (which we recommend) or choose to use them despite the risks.



You will need to allow QuickDesk to connect to your email account.

1. Visit <https://myaccount.google.com/security#activity>.
2. At the bottom of the page, toggle *Allow less secure apps button* to **ON**.
3. You should now be able to set up your *Email Account* on Quickdesk.

Outlook

Please sign in to your Outlook.com account



Outlook.com Team

📧 Reply all | ▾

Hello [\[Redacted\]](#)

To continue sending messages, please [sign in](#) and validate your Outlook.com account.

This helps us stop automated programs from sending junk email.

Thanks for your help and patience!

The Outlook.com Team





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An automated email sent to your Outlook account asking you to sign in and validate your account when setting up your *Email Account* on Quickdesk.

After doing the above, you should now be able to set up your *Email Account* on Quickdesk.

FastMail

Important FastMail service notification

 **The FastMail Team**  **The FastMail Team**
to [redacted] [Show details](#) Inbox  [Reply](#) [More](#) 

Dear [redacted]

This email is from the FastMail email administrator regarding your email account [redacted].

You have just tried to use our SMTP server for sending email.

To stop abuse of our service, trial accounts must verify a mobile phone number or pay to use our SMTP service.

To upgrade your account, please go to:
[\[redacted\]](#)

To verify your account, please go to:
[\[redacted\]](#)

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FastMail Administrator
webmaster@fastmail.com

[Reply](#) [Forward](#)

Only FastMail paid account and trial account with a verified mobile phone number are allowed to use their server to send out email.