

New functionality: SendGrid

We've added the ability send mails via SendGrid to HeroTill, which is done via an http-based API instead of an smtp connection.

Why use SendGrid?

Disadvantages of SMTP

It has a server limitation

Time delays because of multiple servers used to deliver your message which can cause delivery failure and timeout errors

Firewalls can block common ports associated with SMTP, and also flag them as spam

Some firewalls can block ports commonly used with SMTP. It can also be hacked

Not always a detailed record /report available

Advantages to using SendGrid's API

Guaranteed delivery to sendmail's service via http API

Processing of bounced mails

Tracking of customer side mail delivery

Tracking of customer side mail opening

A much more detailed delivery report is now available for every message

As you can see, SendGrid is a great tool to use to ensure better delivery and reporting and control of your sent messages.

Setting up SendGrid

We have put together this [SendGrid setup guide](#) to ensure the mail delivery and mail tracking is correctly configured

Important things to remember:

- sendmail uses the local server's own sendmail service to deliver mail. Please ensure that it is configured correctly to allow mail delivery.
- smtp uses the settings defined below to deliver mail via an external mail server.
- The remote SMTP server needs to be configured to accept smtp connections from this host.
- SendGrid uses API settings defined below to deliver mail via a third-party http API

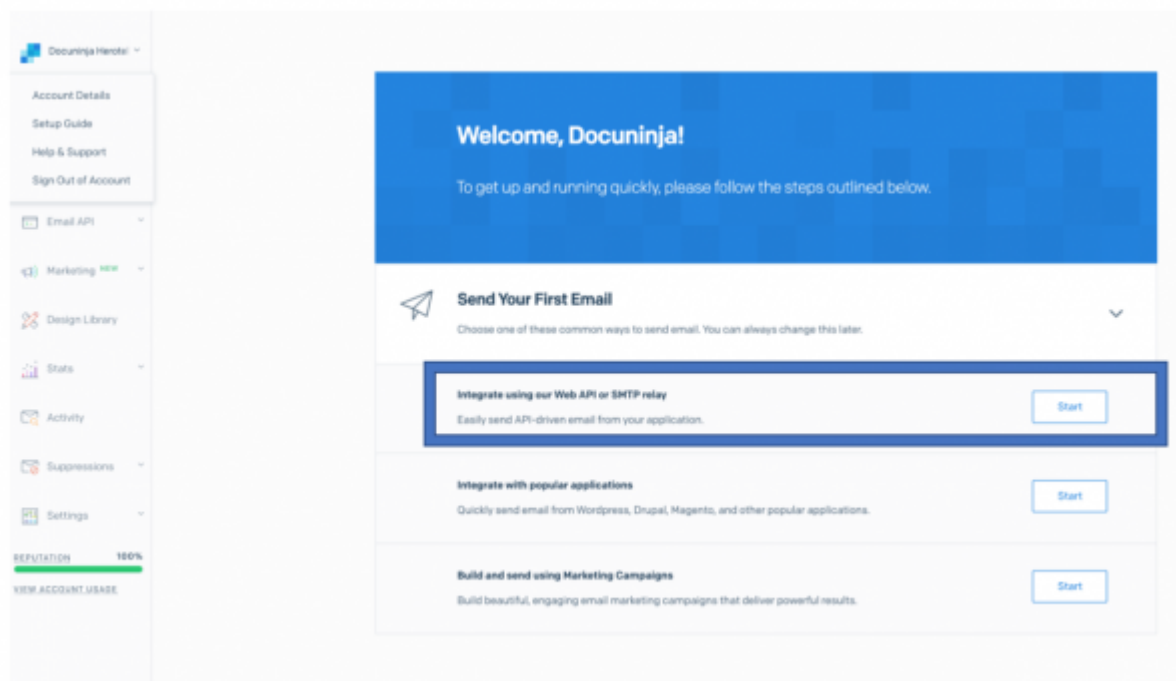
service. An active account with <https://sendgrid.com> is required for this to work

Requirements for setting up SendGrid

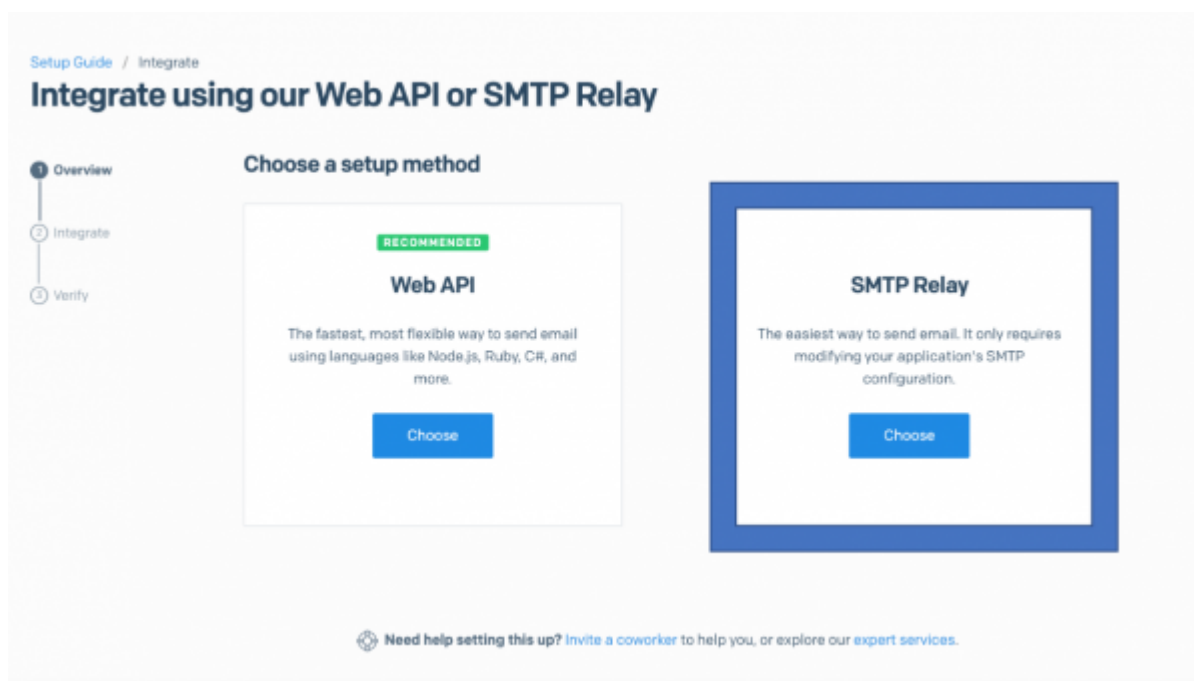
- a subscription with Sendgrid is required for this API to work
- For an optimal spam score custom DNS entries needs to be configured
- This new functionality requires a composer update to install the SendGrid library.
- *At the same time the hybridauth composer library is being downgraded from v3 to v2 to ensure compatibility with DT2.0
- A webhook on SendGrid's side will automatically update the maillog on the HeroTill side should an email bounce after SendGrid has delivered it. This will result in the mail being marked as failed at that point in time.
- A new "Bounced" column and mail status has been added to show mails that were bounced after they were marked as "Delivered". The bounce functionality will only be used by SendGrid.
- The existing SMTP and sendmail delivery mechanisms do not support bounce detection
- to get delivery and open notifications to work a webhook needs to be registered in the SendGrid config. this webhook must point to `/api/v1/sendgrid_webhook`
- In the sangria portal (https://app.sendgrid.com/settings/mail_settings) go to Settings, Mail Settings, and enable event notifications. Use the url as indicated above for the webhook.
- Note that the relevant actions to check includes Dropped, Delivered, Bounced, Opened, etc
- Note that each time you update the mail sending options in DataTill the webhook settings will automatically be configured via an API call to SendGrid

Webhook settings

Go to www.sendgrid.com, register and create an account for yourself. Click on Integrate using our Web API or SMTP relay when you are done.



The following menu will appear:



Select **SMTP Relay**. You will see the following screen:

Integrate using our Web API or SMTP Relay

- ✓ Overview
- 2 Integrate
- 3 Verify

How to send email using the SMTP Relay

1 Create an API key

This allows your application to authenticate to our API and send mail. You can enable or disable additional permissions on the [API keys page](#).

My First API Key Name

APITEST

Create Key

2 Configure your application

Configure your application with the settings below.

Server	smtp.sendgrid.net
Ports	25, 587 (for unencrypted/TLS connections) 465 (for SSL connections)
Username	apikey
Password	YOUR_API_KEY

☐ I've updated my settings.

Next: Verify Integration

Give your

API key a name, preferably something that is easy to identify. Click on **create key** to generate your key.

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"APITEST" was successfully created and added to the next step.

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

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☐ I've updated my settings.

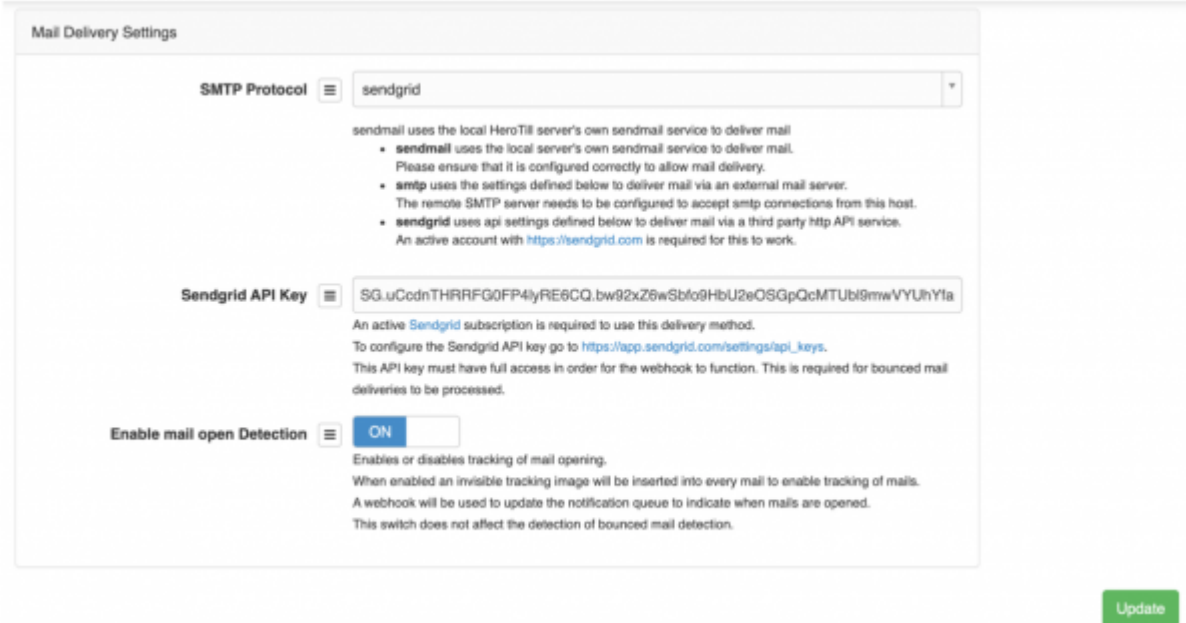
Next: Verify Integration

This key is essentially your password. Copy it somewhere safely, because SendGrid will not allow you to view your key again.

Check that you've updated my settings and click on **verify integration**.

Setting up SendGrid in HeroTill

Get your API Key ready. In HeroTill, go to **Settings-> System Settings->SMTP settings**. Set the SMTP Protocol to SendGrid. and paste the key that you have just generated into the API key box.



Mail Delivery Settings

SMTP Protocol

sendmail uses the local HeroTill server's own sendmail service to deliver mail

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- **smtp** uses the settings defined below to deliver mail via an external mail server. The remote SMTP server needs to be configured to accept smtp connections from this host.
- **sendgrid** uses api settings defined below to deliver mail via a third party http API service. An active account with <https://sendgrid.com> is required for this to work.

Sendgrid API Key

An active [Sendgrid](#) subscription is required to use this delivery method.
To configure the Sendgrid API key go to https://app.sendgrid.com/settings/api_keys.
This API key must have full access in order for the webhook to function. This is required for bounced mail deliveries to be processed.

Enable mail open Detection ☒

Enables or disables tracking of mail opening.
When enabled an invisible tracking image will be inserted into every mail to enable tracking of mails.
A webhook will be used to update the notification queue to indicate when mails are opened.
This switch does not affect the detection of bounced mail detection.

Update

Ensure that mail open Detection is switched to yes and click on **update** when you are done.

Testing

To test your integration in HeroTill, go to **Tools-> Messages-> Send message**.

Customer ✕ ▼
Autofill with Customer Details

Cell Number
Cell Number to send the message to

Email Address
Email address to send the message to

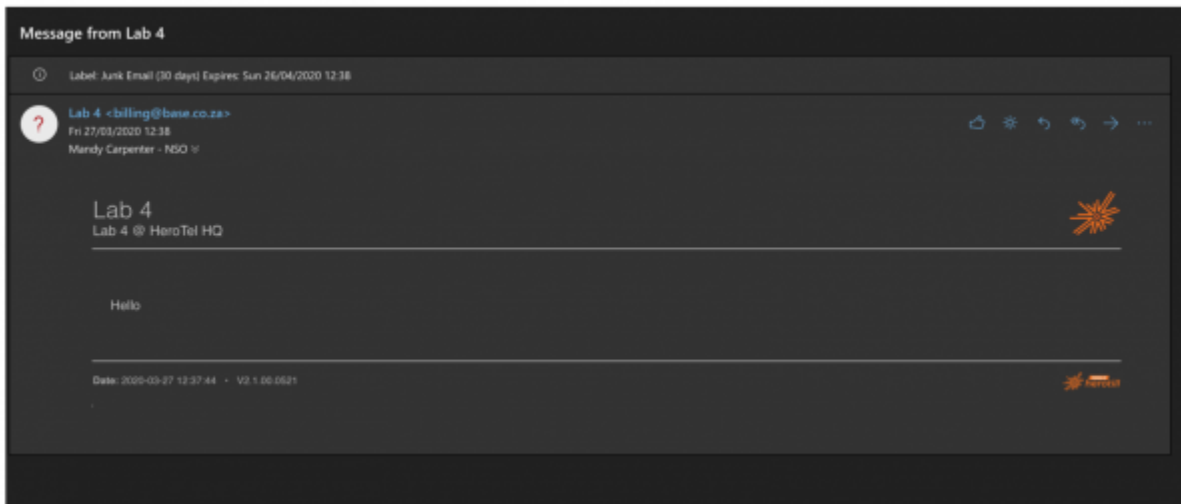
Message
5 Characters

Message details

Please Note: Entering details into both the Cell Number & Email Address boxes will result in your message being sent to both at the same time.

Choose a customer, enter their email address and press send.

If your message was sent successfully, it will look like this:



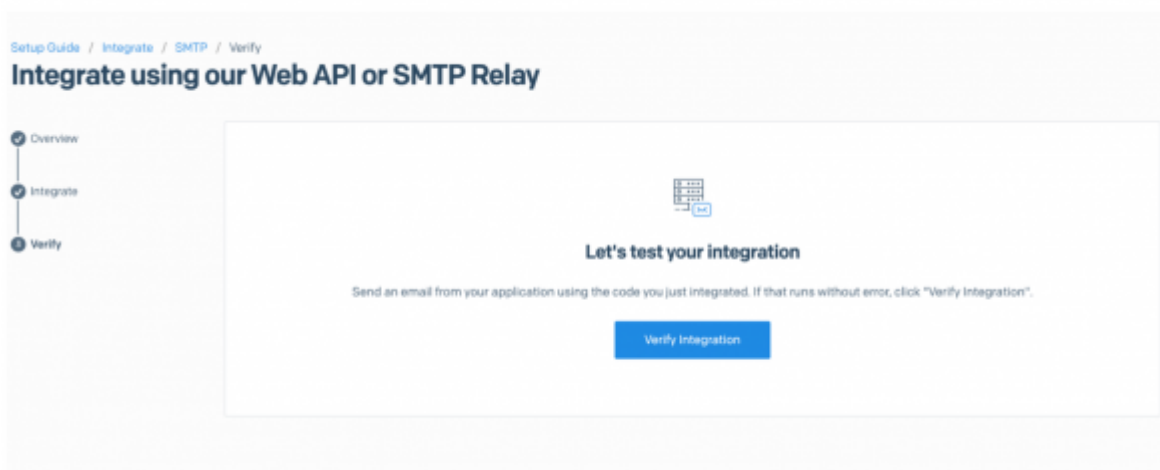
Here on the message log we can see that it was successfully delivered.

A screenshot of the SendGrid Message Log interface. It shows a table with columns: Status, Type, Send After, Sent Date, Customer, Username, To, Subject, User, and Similar. The first row shows a 'Delivered' status for an 'Email' type, sent on '2020-03-27 12:37:44' to a customer 'lme1028'. The subject is 'Message from Lab 4' and the user is 'Data77/Support'. The interface includes filters for 'All Types', 'All States', and 'All Users', and a search bar. The table shows 1 of 1 entries.

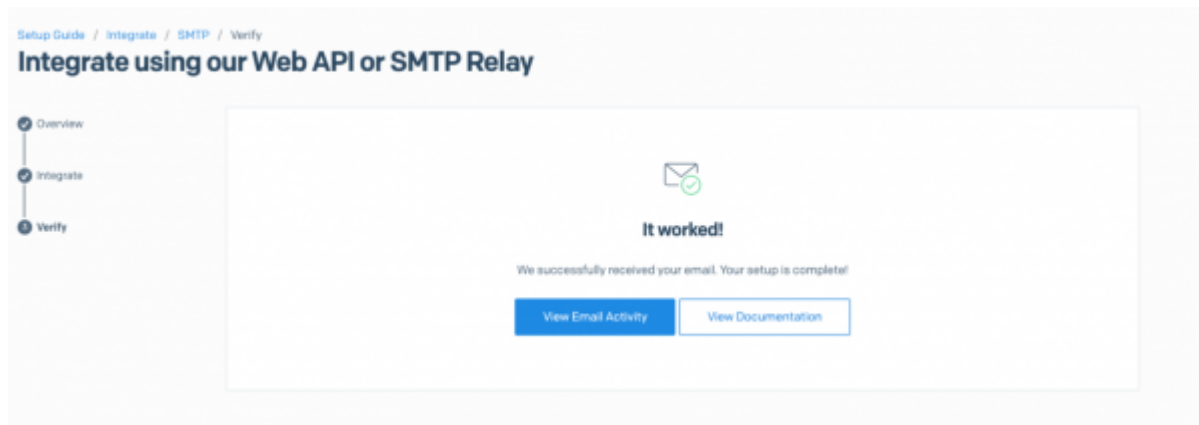
Status	Type	Send After	Sent Date	Customer	Username	To	Subject	User	Similar
Delivered	Email	2020-03-27 12:37:44	2020-03-27 12:38:11	lme1028		[REDACTED]	Message from Lab 4	Data77/Support	

Testing in SendGrid

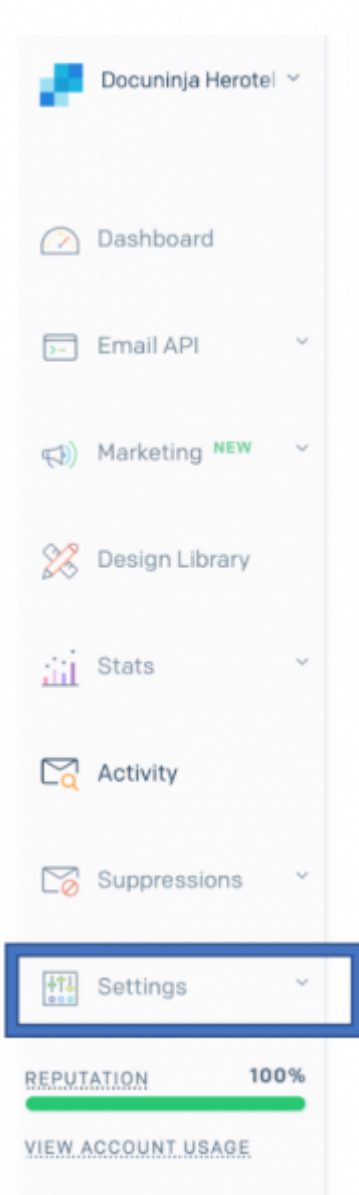
In SendGrid, go to verify integration:



If it has worked, you will receive this message:



To check the details of this message, go to **Activity** on the left bottom menu.





The Activity feed will open and show you your message's details.

Activity Feed Timezone: UTC-00:00 - Coordinated Universal Time [Export CSV](#)

Search emails by: [Advanced Search](#)

To email address

STATUS	MESSAGE	LAST EVENT RECEIVED	OPENS	CLICKS
 Delivered		2020/05/27 10:59am UTC+00:00	2	0

And that is it! If you have any further queries or feedback, please contact us on support@herotill.com