Instructions for Emailing via Bulk Email Service

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Emailing documents from Agvance is an essential part of day-to-day business. Agvance currently generates emails using Microsoft's basic authentication, which is ending on March 1, 2026. This will affect emailing from Agvance regardless of the email platform being used. While it is possible other bulk email services may work, SSI researched and tested using SendGrid[®] - an emailing service that allows companies to use a bulk email service instead of their existing mail service provider. The use of SendGrid[®] helps protect domain reputation as well as get emails into inboxes rather than spam folders. A SendGrid[®] account is required, and there is a charge for this service. Account setup and the charge is the responsibility of the account holder.

SendGrid® Setup Instructions

After setting up a SendGrid[®] account, it is recommended to follow SendGrid[®]'s instructions for helping prevent emails from going to a customer's *Spam* folder. See **here** information regarding this setup.

Once the SendGrid[®] account has been established, enter the following information at *Hub / Setup / Company Preferences* on the *General* tab.

ver			
Allow users to login from multiple machines			
If no Mail Host Port is specified, default port 25 will be used.			
Mail Host Email			
Default timeout for email link (# of days) 30.000			

- Mail Host Enter the mail host information. For SendGrid®, enter smtp.sendgrid.net.
- Set Port and select Use SSL.
- Mail Host Email
 - Address This is a combination of *apikey* and the From email address separated by a *Tab* character.

Create this address in Notepad and copy/paste into the Address field.

apikey reply@companyname.com

• **Password** – For SendGrid[®], enter the API key.