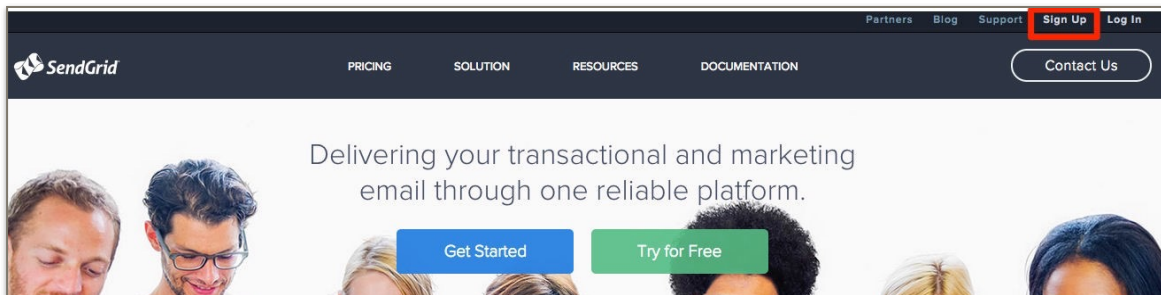


## PART 1

# Sign Up for a Free SendGrid Account and Integrate it to Yoobly CRM

### STEP 1

Go to [www.sendgrid.com](http://www.sendgrid.com) and click Sign Up on the upper right corner of the page.



### Step 2

**Sign up for a Free Plan by clicking the Try for Free button. You may upgrade your account any time later.**

<p><b>LITE PLAN</b></p> <p>Pay as you go with SendGrid Lite .10/1,000 emails.</p> <p><small>* Lite Plan Usage between 0 - 10,000 emails will incur a fee of \$1.00 USD. See warm up and bandwidth details.</small></p> <p><small>** The Lite plan excludes the following features: advanced reporting and analytics, Event Webhook, Parse Webhook, Subuser API, DKIM customization, dedicated IPs, IP white-labeling, IP warm up, feedback loops, marketing email service.</small></p> <p><a href="#">Sign Up for Lite</a></p>	<p><b>FREE PLAN</b></p> <p>12,000 emails per month</p> <p>All features, excluding dedicated IPs. No credit card needed, no expiration.</p> <p><a href="#">Try for Free</a></p>
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### STEP 3

Choose Free 12k \$0.00/Month on the dropdown list, fill in the required account information, and click Create Account Now button.

The screenshot shows a 'New Account' form. At the top right, a dropdown menu is set to 'Free 12k \$0.00 / Mo'. Below this, the 'ACCOUNT INFO' section contains three input fields: 'Username', 'Email Address', and 'Password' (with an asterisk indicating it is required). The 'PLAN DETAILS' section shows 'Free 12k - 12k/Mo Emails' for '\$0.00' and 'Due Today (July payment)' for '\$0.00'. At the bottom, a blue button labeled 'Create Account Now →' is highlighted.

### STEP 4

Check your email for the confirmation link. Click Confirm Your Email Address button to confirm your account.

The screenshot shows an 'Email Confirmation' page. The text reads: 'Please confirm your email address and agree to our Terms of Service. By clicking on the following link, you are agreeing to SendGrid's [Terms of Service](#).' Below the text is a green button labeled 'Confirm Your Email Address'.

## STEP 5

Complete your profile with the correct information and click Save button.

**Before you start** sending your emails, please take a moment and complete your profile.

First Name	Last Name	
Company Name		
Company Website		
Company Address		
Company City	No STATE	Company Zip
Type your country	Phone Number	
Choose Relevant Industry		
Choose Relevant Role		
Monthly Email Volume		

[Save](#)

## STEP 6

Wait for your account to be confirmed and validated.

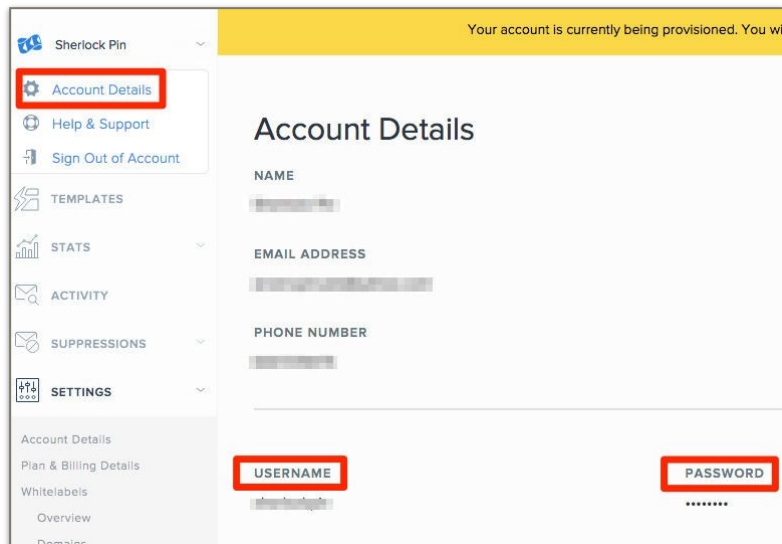
**NOTE:** This is only for free account signups.

Your account is currently being provisioned. You will not be able to send out any email.

[Learn More](#)

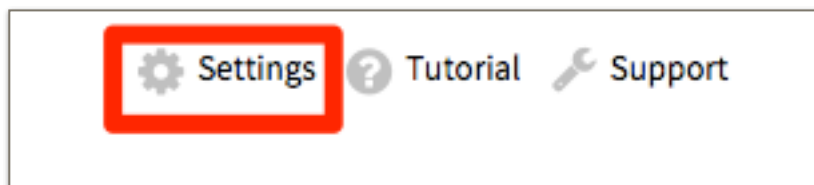
## STEP 7

View your account's details and take note of your username and password.



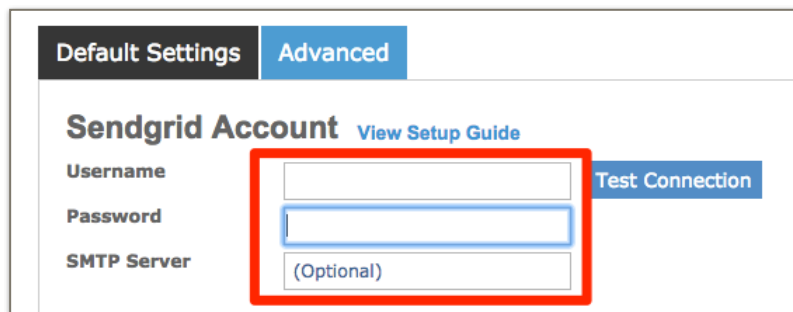
## STEP 8

Login to your CRM account and click Settings on the upper right corner of the page.



## STEP 9

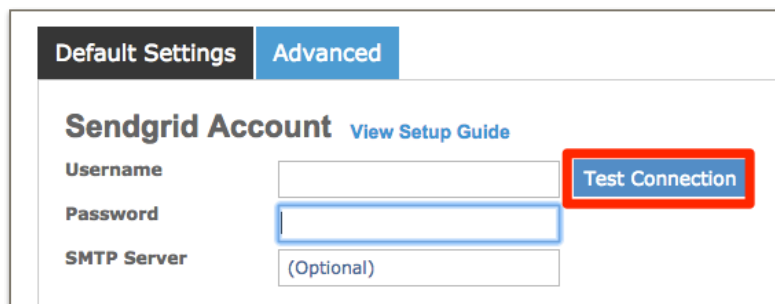
Click Advanced button, key in your SendGrid username, password, and SMTP server and click Save Settings button.



The screenshot shows the 'Advanced' tab of the 'Sendgrid Account' settings. It features three input fields: 'Username', 'Password', and 'SMTP Server (Optional)'. A blue 'Test Connection' button is positioned to the right of the 'Username' field. A red rectangular box highlights the three input fields.

## STEP 10

Click Test Connection button to confirm if your SendGrid account is successfully integrated.



This screenshot is identical to the previous one, but the 'Test Connection' button is highlighted with a red rectangular box, indicating the next step in the process.

## IMPORTANT:

Once your SendGrid account is integrated to your CRM, you can now send emails to your contacts, even with those Email Pending status, and will be sent immediately.

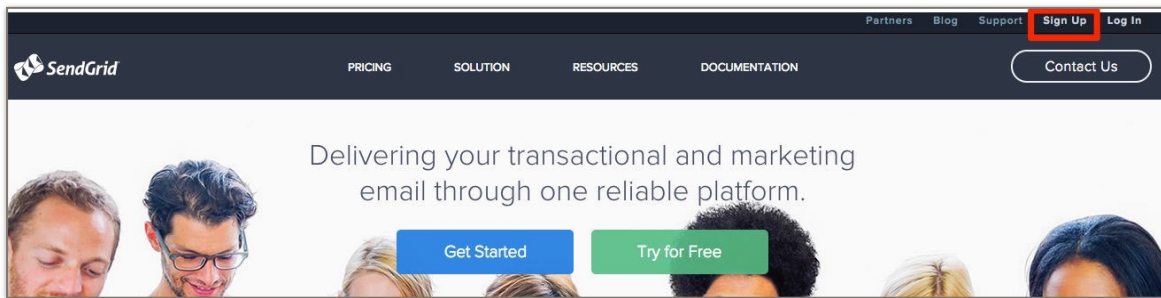
## PART 2

### Setup WebHook in SendGrid

(This tool enables you to have control over notifications for events such as bounces, clicks, opens rates and gather the data required for the most detailed reporting.)

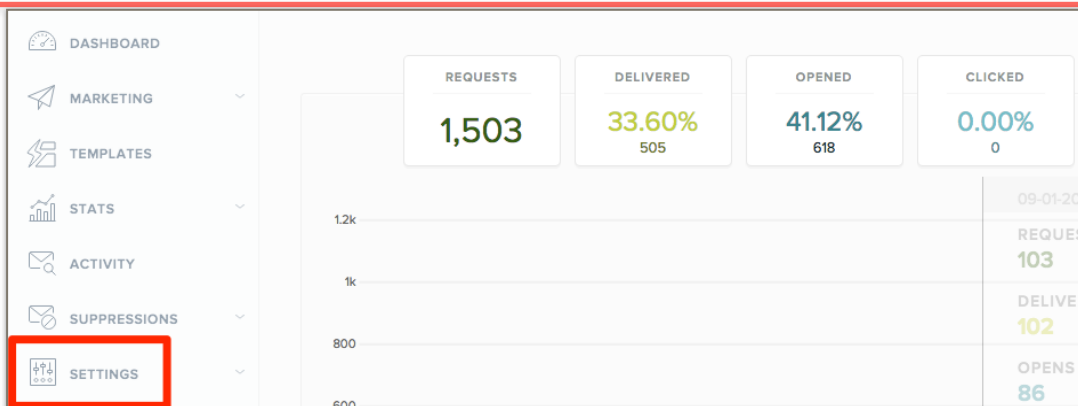
#### Step 1

Log in to your SendGrid account.



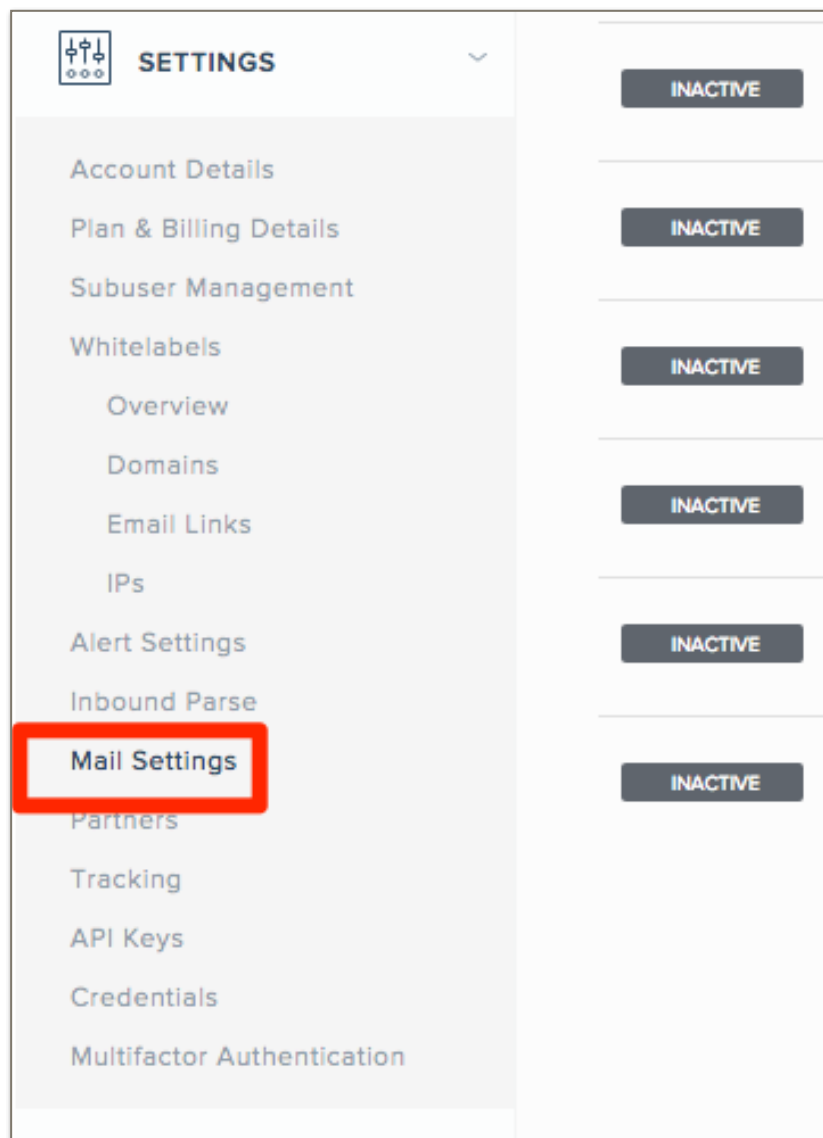
#### Step 2

Click Settings.



### Step 3

Click Mail Settings.



### Step 4

Click Event Notification to expand settings.

INACTIVE	Bounce Purge	Allows you to automatically purge bounce records from SendGrid after a specified number of days.
ACTIVE	Event Notification	Controls notifications for events, such as bounces, clicks, and opens.
INACTIVE	Footer	Allows you to add a custom footer to outgoing email.
INACTIVE	Forward Bounce	Allows you to forward bounces to a specific email address.
INACTIVE	Forward Spam	Allows for a copy of spam reports to be forwarded to an email address.
INACTIVE	Legacy Email Template	Allows you to customize your outgoing HTML emails.
INACTIVE	Plain Content	Convert your plain text emails to HTML.
INACTIVE	Spam Checker	Check outbound messages for spam content.

## Step 5

Click Edit and set HTTP Post URL to  
<http://sendgrid.yooblycrm.com/webhook.php>  
and click the check icon to save.

ACTIVE Event Notification Controls notifications for events, such as bounces, clicks, and opens.

On

CONFIGURATION edit

You can utilize our Event Notification framework to gather the data required for the most detailed reporting. If you need more assistance, please see our [Event Notification documentation](#).

Please note: If the open and click tracking apps are not enabled, the open and click events will not be posted.

HTTP POST URL

<http://sendgrid.yooblycrm.com/webhook.php>

INTEGRATION TESTING TOOL

Use this tool to verify the integration prior to saving your settings.

Test Your Integration



## Step 6

Check All actions.

### INTEGRATION TESTING TOOL

Use this tool to verify the integration prior to saving your settings.

Test Your Integration

### SELECT ACTIONS

Select which actions you would like reported back to your system.

- |   |   |
|---|---|
| <input checked="" type="checkbox"/> All       | <input checked="" type="checkbox"/> Opened                |
| <input checked="" type="checkbox"/> Processed | <input checked="" type="checkbox"/> Clicked               |
| <input checked="" type="checkbox"/> Dropped   | <input checked="" type="checkbox"/> Unsubscribed From     |
| <input checked="" type="checkbox"/> Deferred  | <input checked="" type="checkbox"/> Mark as Spam          |
| <input checked="" type="checkbox"/> Delivered | <input checked="" type="checkbox"/> ASM Group Unsubscribe |
| <input checked="" type="checkbox"/> Bounced   | <input checked="" type="checkbox"/> ASM Group Resubscribe |

## Congratulations!

You're all set!

Having activated your WebHook in SendGrid allows you to see sends and opens rates in your CRM email campaigns.