

# SendGrid New Account Setup Guide

## Overview

This document provides step-by-step instructions for setting up a new SendGrid account, including generating an API key, configuring DNS settings, setting up alerts, configuring webhooks, CRM configuration and other essential configurations. Links to official documentation are provided for further reference.

### 1. Account Creation

- Visit SendGrid's website (<https://sendgrid.com>) and sign up for an account.
- Complete the email verification process.
- Log in to your account and navigate to the Dashboard.
- For more details: SendGrid Account Guide (<https://www.twilio.com/docs/sendgrid/ui/account-and-settings/account>).

### 2. API Key Generation

- Navigate to Settings > API Keys in the left-hand menu.
- Click Create API Key.
- Provide a name for the API key (e.g., App Integration Key).
- Set the appropriate permissions: Full Access.
- Click Create & View to generate the API key.
- Copy and save the API key securely, as it will not be shown again.
- For more details: API Key Creation Guide (<https://www.twilio.com/docs/sendgrid/ui/account-and-settings/api-keys>).

### 3. DNS Configuration

- Access DNS Settings by navigating to Settings > Sender Authentication.
- Choose your DNS host provider and enter your domain name.
- Log in to your DNS host and add the records provided by SendGrid.
- Verify the settings in SendGrid once the DNS changes propagate (It takes 48 hrs).

- For more details: Domain Authentication Guide (<https://www.twilio.com/docs/sendgrid/ui/account-and-settings/how-to-set-up-domain-authentication>).

#### 4. Alert Configuration

- Navigate to Settings > Alerts.
- Click Create Alert and choose the alert type (e.g., Usage Alerts or Bounce Alerts).
- Enter recipient email(s) and set thresholds or conditions.
- Save the configuration.
- For more details: Alert Setup Guide (<https://www.twilio.com/docs/sendgrid/ui/account-and-settings/alerts#alerts>).

#### 5. Webhook Configuration

- Enable Webhooks via Settings > Mail Settings > Event Webhook.
- Enter the URL ([http://outmails.njcrm.in/events/sg\\_webhook.php](http://outmails.njcrm.in/events/sg_webhook.php)) where events will be sent and choose events to track.

### Edit your event webhook ✕

• Post URL

http://outmails.njcrm.in/events/sg\_webhook.php

Requires http:// or https://

• Actions to be posted

<b>Engagement data</b> <input checked="" type="checkbox"/> Opened <input checked="" type="checkbox"/> Clicked <input checked="" type="checkbox"/> Unsubscribed <input checked="" type="checkbox"/> Spam Reports <input checked="" type="checkbox"/> Group Unsubscribes <input checked="" type="checkbox"/> Group Resubscribes	<b>Deliverability Data</b> <input checked="" type="checkbox"/> Processed <input checked="" type="checkbox"/> Dropped <input checked="" type="checkbox"/> Deferred <input checked="" type="checkbox"/> Bounced <input checked="" type="checkbox"/> Delivered	<b>Account Data</b> <input type="checkbox"/> Account Status Change
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**Security features**

Secure your webhook data coming from Twilio SendGrid. [Learn more.](#)

**Signature Verification**

Enable Signed Event Webhook

**OAuth Verification**

Enable OAuth

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- Test the webhook to confirm functionality and Save.
- For more details: Webhook Configuration Guide (<https://www.twilio.com/docs/sendgrid/for-developers/tracking-events/twilio-sendgrid-event-webhook-overview>).

## 6. Additional Configuration

- Enable Subscription Tracking to comply with anti-spam laws (Settings > Mail Settings).
- Monitor email deliverability using the Statistics section.
- For more details:
  - - Subscription Tracking Guide (<https://www.twilio.com/docs/sendgrid/ui/sending-email/subscription-tracking>).

- - Email Deliverability Monitoring (<https://www.twilio.com/docs/sendgrid/ui/analytics-and-reporting/stats-overview>).

## 8. Testing

- Send a test email to confirm your account is correctly configured.
- Check the inbox, spam folder, and delivery status logs.
- For more details: Testing Emails Guide (<https://www.twilio.com/docs/sendgrid/ui/sending-email/email-testing>).

## 9. Ongoing Maintenance

- Regularly review the Activity section for errors or issues.
  - Update DNS records if there are domain changes.
  - For more details: SendGrid Activity Monitoring (<https://www.twilio.com/docs/sendgrid/ui/analytics-and-reporting/email-activity-feed>).
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## Setting Up API Key in Sangam CRM

Once the SendGrid setup is complete, integrate the API key into Sangam CRM to enable email functionality.

### Steps to Integrate API Key in Sangam CRM

1. Log in to your Sangam CRM admin panel.
2. Navigate to Admin > Email.
3. Select SendGrid as your email provider.
4. Paste the previously generated API Key into the provided field.
5. Configure additional options, such as:
  - From Name, From email address.
  - Allow Domains of your email (eg. @enjayworld.com).
  - Reply-to email address (optional).
6. Test the configuration:
  - Send a test email from Sangam CRM to verify the integration.
  - Ensure the email is successfully delivered.

