Setting Up FluentCRM, FluentSMTP, Fluent Forms, and SendGrid on Your OptiBlog Site

A step-by-step DIY guide for OptiBlog customers

OptiBlog provides the Fluent plugin stack already installed and activated on your WordPress site. You are responsible for creating and maintaining your own SendGrid account, configuring your sending domain, creating your SendGrid API key, and setting up your own CRM/email automation inside WordPress.

Assumption: *This guide starts after FluentCRM, FluentSMTP, and Fluent Forms are already installed and activated on your OptiBlog-hosted WordPress site.*

This guide covers:

- SendGrid account and domain authentication
- DNS record setup
- SendGrid API key creation
- FluentSMTP connection
- FluentCRM business and email settings
- Lists, tags, forms, automations, sequences, testing, and final checklist

Before You Begin

You will need access to the following before starting:

- Your WordPress admin dashboard
- Your SendGrid account or the ability to create one
- Your domain DNS provider, such as your registrar, Cloudflare, Route 53, or another DNS host
- Your business name and valid mailing address
- The email address you want to send from, such as hello@example.com
- The email address where replies should go

Important: *Do not send your SendGrid password, registrar password, or DNS password by email. Keep control of your own accounts.*

1. Create or Log In to Your SendGrid Account

Go to SendGrid and either create a new account or log in to your existing SendGrid account.

SendGrid is the email delivery service that will actually send your messages. Your OptiBlog hosting account does not include SendGrid service, SendGrid billing, SendGrid deliverability management, or SendGrid account support.

Complete any verification steps required by SendGrid before continuing.

2. Authenticate Your Sending Domain in SendGrid

In SendGrid, go to Settings -> Sender Authentication, then choose Authenticate Your Domain.

Domain authentication lets you send using your own domain instead of relying on SendGrid's default sending domain. With Automated Security enabled, SendGrid typically provides CNAME records for DNS.

Recommended choices: choose your DNS host if listed, leave Automated Security enabled, enter your sending domain, and use the default sending subdomain unless you know you need something different.

3. Add SendGrid DNS Records to Your Domain

SendGrid will show several DNS records, usually CNAME records. Log in wherever your DNS is managed and add the records exactly as SendGrid provides them.

Copy the host/name value exactly. Copy the target/value exactly. Do not add extra dots unless your DNS provider specifically requires them.

After adding the records, return to SendGrid and click the verification/authentication button. DNS may not verify immediately; if it fails at first, wait and try again later.

4. Create a Verified Sender in SendGrid

In SendGrid, go to Settings -> Sender Authentication. Domain authentication is the preferred long-term choice for business sending. Single Sender Verification can be used for a single sender address when appropriate.

Create a sender identity using your business name, sending email address, and reply-to email address.

Use an email address on the same domain you authenticated whenever possible. For example, if your domain is example.com, use hello@example.com rather than a Gmail or Yahoo address.

5. Create a SendGrid API Key

In SendGrid, go to Settings -> API Keys -> Create API Key.

Give the key a clear name, such as OptiBlog example.com FluentSMTP.

Use Full Access or a restricted key with at least Mail Send permission. Copy the key immediately and store it securely. SendGrid may only show it once.

6. Connect SendGrid to FluentSMTP in WordPress

Log in to your WordPress admin dashboard and go to FluentSMTP -> Settings.

Choose Add Connection or Add Another Connection, then select SendGrid as the mailer/provider.

Enter your verified From Email, From Name, and SendGrid API key. Enable Force From Email and Force Sender Name unless you have a specific reason not to. Save the connection.

7. Send a Test Email from FluentSMTP

Go to FluentSMTP -> Email Test and send a test email to an address you can check, such as Gmail, Outlook, Yahoo, or another mailbox outside your domain.

Check the inbox, promotions tab, and spam/junk folder.

If the test fails, confirm the SendGrid API key, verified sender/domain, FluentSMTP settings, FluentSMTP logs, and SendGrid activity.

8. Configure FluentCRM Business Settings

Go to FluentCRM -> Settings -> Business Settings.

Enter your business name, business address, and business logo if applicable.

Use a real business mailing address. Commercial email should include a valid physical postal address.

9. Configure FluentCRM Global Email Settings

Go to FluentCRM -> Settings -> Email Settings.

Configure the Default From Name, Default From Email, and Reply-To Email. Use the same authenticated sender email that you configured in SendGrid and FluentSMTP.

Confirm that your email footer includes your business name, mailing address, unsubscribe link, and manage preferences link if appropriate.

10. Create Your FluentCRM Lists and Tags

Go to FluentCRM -> Contacts -> Lists and create broad subscription categories such as Newsletter, Customers, Prospects, Course Leads, or Consultation Requests.

Go to FluentCRM -> Contacts -> Tags and create more specific behavior or interest labels such as Downloaded Lead Magnet, Requested Consultation, Purchased Product, Webinar Registered, Hot Lead, or Cold Lead.

Use lists for broad subscription categories. Use tags for behavior, interest, source, and automation triggers.

11. Create or Connect an Opt-In Form with Fluent Forms

Go to Fluent Forms -> New Form and create a form for your subscribers or leads.

A basic opt-in form usually includes First Name, Email Address, and optionally phone, message, or consent checkbox fields.

Configure the FluentCRM integration for the form under Marketing & CRM Integrations or the relevant integration/feed settings.

12. Add the Form to a Page

Create or edit a WordPress page and add your Fluent Form using the Fluent Forms block or shortcode.

Use the form on a newsletter signup page, lead magnet page, contact page, webinar registration page, or consultation request page.

Publish or update the page, submit a test entry, then confirm that the contact appears in FluentCRM with the correct list and tags.

13. Create Your First Email Template

Go to FluentCRM -> Email Templates and create a reusable template for your normal email style.

Keep it simple: include your logo or business name, a readable body area, and a compliant footer with address and unsubscribe link.

Avoid overly complex designs until you have verified delivery and engagement.

14. Create Your First Email Sequence

Go to FluentCRM -> Email Sequences and create a new sequence, such as New Subscriber Welcome Sequence.

A simple starter sequence may include: Email 1 immediately to welcome and deliver the promised resource; Email 2 after one day with useful context; Email 3 after two or three days with deeper value; Email 4 after four to seven days with a soft next step or offer.

Save and publish the sequence when ready.

15. Create an Automation to Start the Sequence

Go to FluentCRM -> Automations and create a new automation.

Choose a trigger such as contact added to list, tag applied, or form submitted.

Typical actions include adding the contact to a list, applying a tag, starting the welcome sequence, and applying a tracking tag. Activate the automation and test it with your form.

16. Create and Send a Test Campaign

Go to FluentCRM -> Campaigns and create a new email campaign.

Choose a small test audience first. Ideally, use a test list with your own addresses.

Check the subject line, preview text, sender name, sender email, footer, unsubscribe link, and every link in the email before sending.

17. Check FluentCRM Cron Status

FluentCRM relies on scheduled background tasks for campaigns, sequences, and automations.

Go to FluentCRM -> Settings -> Tools and check the cron/job status.

If scheduled emails are not sending when expected, check FluentCRM cron status, WordPress cron behavior, FluentSMTP logs, SendGrid activity, and whether your SendGrid account is active and allowed to send.

18. Review SendGrid Sending Activity

In SendGrid, review your sending activity after tests and campaigns.

Look for delivered messages, bounces, blocks, spam reports, invalid addresses, and authentication warnings.

If messages are accepted by SendGrid but not reaching inboxes, that is usually a deliverability issue rather than a hosting issue.

19. Basic Deliverability Checklist

Confirm that your SendGrid domain authentication is verified and that your From Email uses the authenticated domain.

Confirm that FluentSMTP test email sends successfully and that FluentCRM business settings are complete.

Every marketing email should include an unsubscribe link and your valid mailing address. Do not import purchased, scraped, or questionable email lists.

20. What OptiBlog Supports vs. What You Manage

OptiBlog provides WordPress hosting, the installed Fluent plugin stack, a working WordPress environment, and general hosting-level support.

You manage your SendGrid account, SendGrid billing, sending limits, API key, sender/domain authentication, DNS records, FluentCRM lists/tags/forms/campaigns/automations, email content, legal compliance, sender reputation, and deliverability.

If you want this setup handled for you, ask about the OptiBlog Fluent CRM QuickStart Setup service.

Sample FluentCRM Email Footer

You may adapt this footer for your own business:

```
You are receiving this email because you subscribed to updates from {{crm.business_name}}.

Our mailing address is:
{{crm.business_address}}
```

```
Manage your email preferences: {{crm.manage_subscription_url}}
Unsubscribe: {{crm.unsubscribe_url}}
```

Quick Setup Checklist

- [ ] SendGrid account created
- [ ] Sending domain authenticated in SendGrid
- [ ] SendGrid DNS records added and verified
- [ ] Sender identity created or verified
- [ ] SendGrid API key created
- [ ] FluentSMTP connected to SendGrid
- [ ] FluentSMTP test email delivered
- [ ] FluentCRM business settings completed
- [ ] FluentCRM email footer includes address and unsubscribe link
- [ ] Lists created
- [ ] Tags created
- [ ] Fluent Forms opt-in form created
- [ ] Fluent Forms connected to FluentCRM
- [ ] Test form submission creates a FluentCRM contact
- [ ] Welcome sequence created
- [ ] Automation created and activated
- [ ] Test contact enters automation
- [ ] Test campaign sent successfully
- [ ] FluentCRM cron status checked
- [ ] SendGrid activity checked

Fast Troubleshooting Reference

Problem	What to Check
SendGrid will not verify the domain	Check that every DNS record was copied exactly. Wait for DNS propagation and try again.
FluentSMTP test email fails	Check the API key, selected SendGrid provider, verified sender, From Email, and FluentSMTP logs.
Form submission does not create a contact	Check the Fluent Forms to FluentCRM integration/feed and field mapping.
Automation does not start	Check the automation trigger, list/tag conditions, and whether the test contact matches the trigger.
Sequence email does not send	Check sequence status, automation enrollment, FluentCRM cron status, FluentSMTP logs, and SendGrid activity.
Email goes to spam	Check domain authentication, sender reputation, email content, engagement, and whether you are emailing a permission-based list.

Reference Links

- FluentSMTP SendGrid driver setup
- Fluent Forms integration with FluentCRM
- FluentCRM and Fluent Forms integration documentation
- SendGrid domain authentication
- SendGrid API key / Mail permissions reference
- FTC CAN-SPAM compliance guide

Final Notes

This guide is provided as a practical setup reference for OptiBlog customers. Third-party services such as SendGrid may change their screens, pricing, approval requirements, or account policies. Use the current documentation from SendGrid, FluentSMTP, FluentCRM, and Fluent Forms when a screen or menu has changed.

This guide is not legal advice. You are responsible for your email content, list permission, unsubscribe handling, business identity, and compliance with applicable email laws and platform policies.