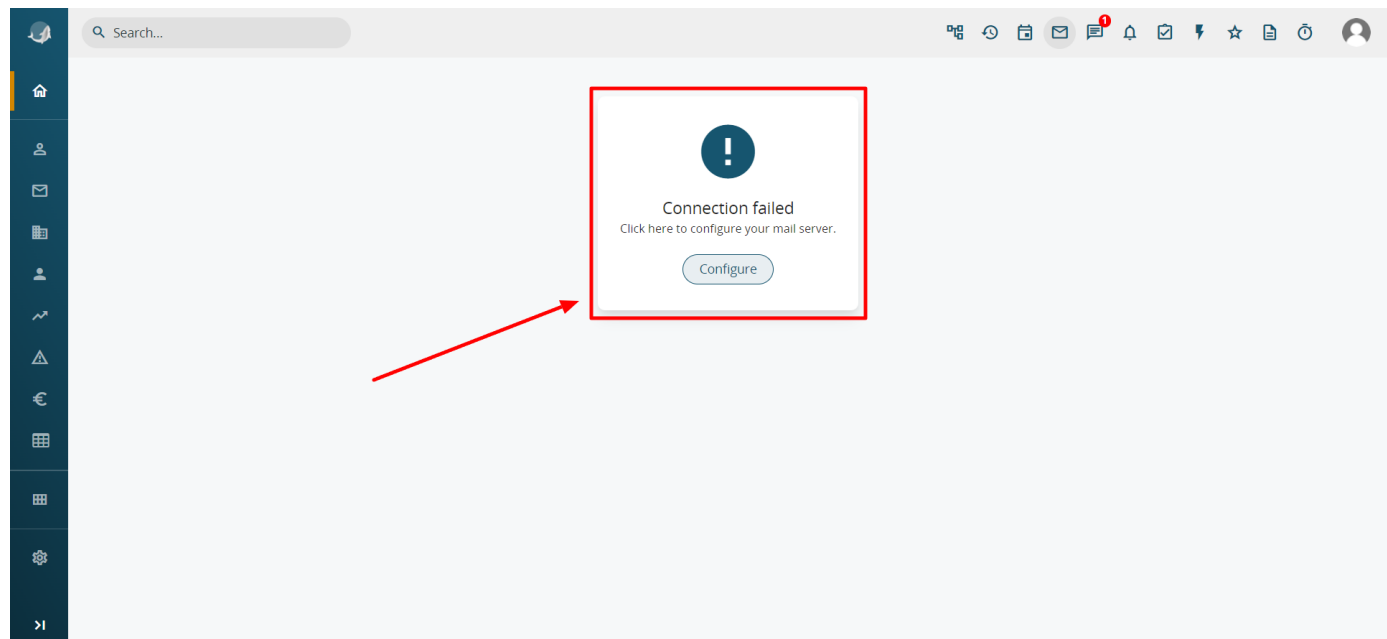


5.2.1 IMAP configuration and folders

To proceed with the email configuration you need to open the module Messages:



First of all you need to click the "Configure" button (only the first time). Once you have set the SMTP server (see above), the IMAP server can be set up here or directly from the Messages module of each user through the cogwheel icon > Account.

Each user will be able to manage multiple mailboxes, both on servers configured in the Admin Settings and on other servers.

Account	Select the account type from the options provided or choose Custom
Username	Email address of the mail server for access via IMAP
Authentication Method	You can choose whether the authentication is done via Password or OAuth2
Email	To enter the email address (optional, and it auto-fills upon saving by copying the Username if left blank)
Password	If the Password option is selected in Authentication Method, this field will be used to enter the password for your email account

Description	To enter a description of the email account (optional, and it auto-fills upon saving by copying the Username if left blank)
Main	It is used to determine the primary email address for sending emails (in case multiple accounts are configured in the Messages module)
Share sender	It allows configuring a shared mailbox with all users (this configuration is only allowed for the admin user, and the mailbox is shared solely as a sending email address, not for receiving)
Mail Server Settings (IMAP)	
Server name	This field should be filled in with the server name details provided by your Maintainer (e.g., Aruba). For example, you would enter imaps.aruba.it if Aruba is your Maintainer, as an example
Port	It is used to enter the port number that the email account connects to for incoming mail
SSL/TLS	SSL/TLS if present
Domain	specify the domain, for example company.com
Mail Server Settings (SMTP)	
SMTP server	Select the type of account from the options provided or choose Custom
Server Name	This field should be filled in with the server name details provided by your Maintainer (e.g., Aruba). For example, you would enter ssl://smtps.aruba.it if Aruba is your Maintainer, as an example
Port	It is used to enter the port number that the email account connects to for outgoing mail
Username	indirizzo mail del server di posta per l'accesso via SMTP
Password	It is used to enter the password for your email account for SMTP authentication (typically, the password is the same as the one used to access the email account)
Requires Authentication?	To determine whether the server requires authentication for outgoing mail
Signature template	selecting "Custom" makes it possible to enter text, images, and links as a personal signature at the foot of email messages, while selecting "Company Name" (Acme, in the example) allows the signature configured in settings to be used. This new function is called "Centralized signature" (see section 5.2.1.1 Set Up Centralized Signature)

Other Settings	
Account	It allows you to access the configuration of new email accounts (in the Messages module, you can configure as many email accounts as you wish)
Folders	You can access the configuration of the email account folders, correctly matching them with the folders required by the CRM view: INBOX, DRAFTS, SENT, SPAM, TRASH
Layout	<p>it allows to set the email layout choosing between the following configurations:</p> <ul style="list-style-type: none"> - show previw description in message list; - enable thread view; - merge account folders.
Filters	it allows to create rules to move mail within folders of the selected account
POP3	it allows to manage mail coming from pop3 mailbox directly within the account created.
Out of office	it allows to apply rules to send automatically email.

In this pop-up you can select the kind of account you are configuring. Here you can see every selectable value:



Settings > Accounts

Save

Cancel

Account

Select




Select

Gmail

Microsoft Office365

Yahoo!

Custom

Settings > Accounts

SaveCancel

AccountCustom

User Name

Authentication methodPassword

Emailoptional

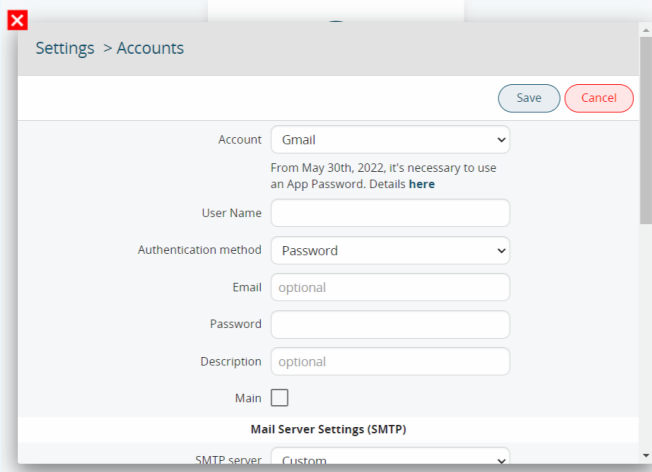
Password

Descriptionoptional

Main☐

Share sender☐

Mail Server Settings (IMAP)

<p>Gmail</p>	<p>Selecting Gmail the window will be like this:</p>  <p>As you can see right after the field: From May 30th, 2022, it's necessary to use an App Password. Details here</p> <p>This action must be done in order to complete the configuration.</p> <p>You can also use the Two-factors Authentications (OAuth2).</p>
<p>Microsoft Office365</p>	<p>Here you need to provide username and password. PAY ATTENTION: if the Outlook Authentication is made by OAuth2 you must not use a custom imap account but the standard one. We remind you that the IMAP Office365 is listening to the port 993 (do not use the 443).</p>
<p>Yahoo!</p>	<p>You just need to type username and password.</p>
<p>Custom</p>	<p>Here you can configurate completely every connection parameter (IMAP, SMTP, ports)</p>

Settings > Accounts

Save Cancel

Mail Server Settings (IMAP)

Server Name

Port

SSL/TLS --None--

Domain

Mail Server Settings (SMTP)

SMTP server Custom

Server Name

Port

User Name

13-01-2021 08:03

Settings > Accounts

SAVE CANCEL

Account Gmail

User Name @gmail.com

Authentication method Password

Email @gmail.com

Password

Description @gmail.com

Main ☒

Mail Server Settings (SMTP)

SMTP server Gmail

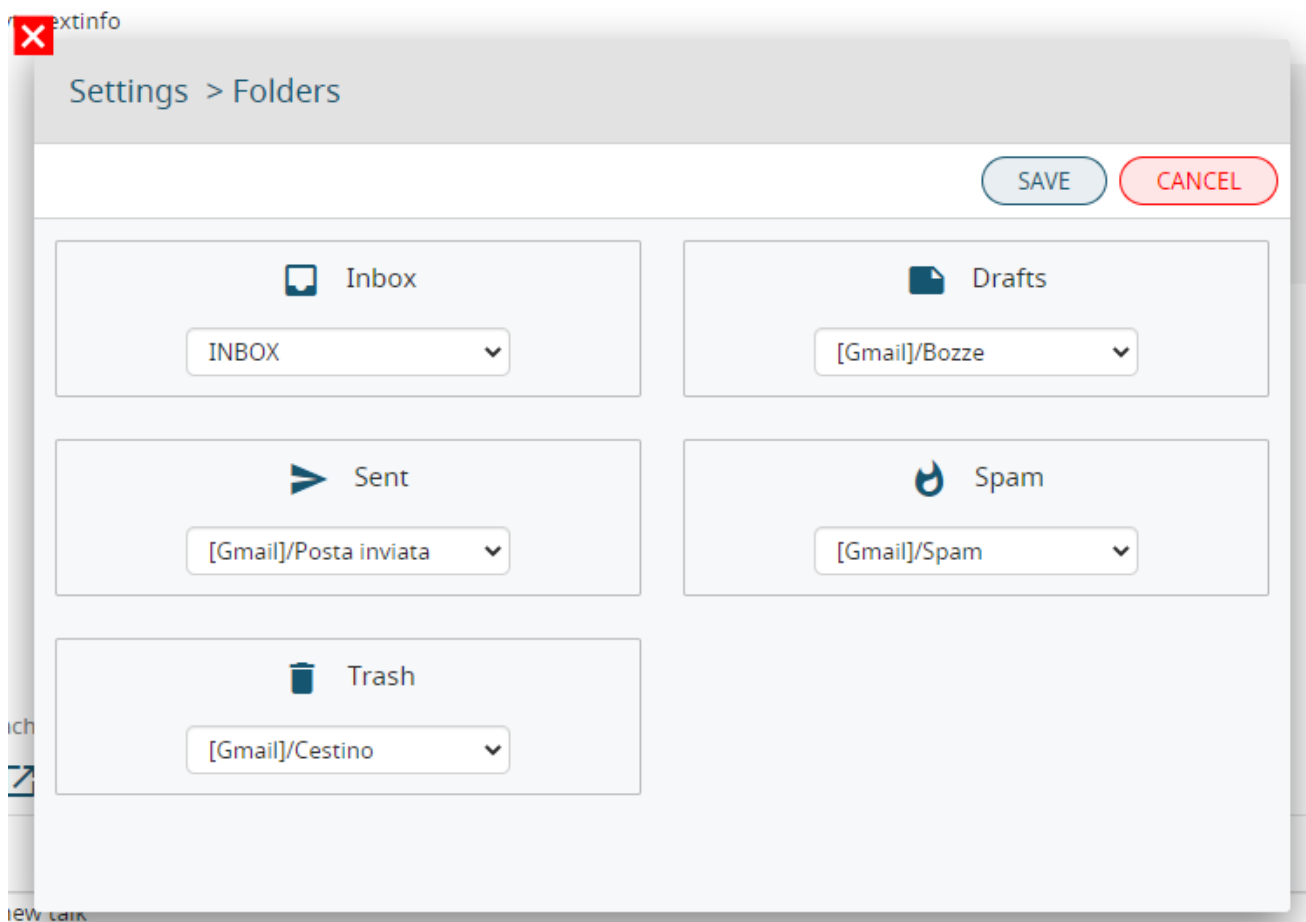
Signature

Signature template Acme

\$Users| |first_name\$ \$Users| |last_name\$
 \$Users| |roleid\$

After having entered the access credentials, set up the main folders for incoming emails, sent emails, drafts, bin and spam.

The user can change the layout at any time by accessing Folders from the Messages module

















Once the configuration, of one or more accounts is ended, you can find in the Message module the list of the folders (standard and special) divided for each account or in a unified version.

This allows the user to display, for example, all the incoming emails from different addresses in one single folder.

Special folders

There are two special folders in the folders list:

- **Shared:** contains emails that other users have shared with you via a conversation (see below);
- **Imported:** contains all the Messages that are not included in any of the user's IMAP accounts for various reasons, but are linked to a vtenext record;
- **Flagged:** contains emails marked 
- **Scheduled:** contains all the scheduled messages that have to be sent, according to the chosen time and date.

Folders			
	Shared		
	Flagged		1
	Outgoing		4
	Inbox		
	Drafts		
	Sent		
	Trash		27
	Chats		
	Contacts		
	Emailed Contacts		
	Junk		

Below examples of PEC email configuration:

PEC Aruba

Name	Choose the Custom option
Server	IMAP: imaps.pec.aruba.it SMTP:smtps.pec.aruba.it
Port	IMAP: 993 SMTP: 587 SSL/TLS if present

PEC Legailmail

Name	Choose the Custom option
Server	IMAP: mbox.cert.legalmail.it SMTP: sendm.cert.legalmail.it
Port	IMAP: 993 SMTP: 465 SSL/TLS if present

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