

## 5.1 Outbound mail configuration (SMTP)

To activate the transmission of emails from CRM, fill in the SMTP server data in Settings > Mail server > Simple Mail Transfer Protocol (SMTP).

Search...

## @ Settings > Mail Server

Configure Mail Server details

### Mail Server Settings (SMTP)

|                          |                          |
|--------------------------|--------------------------|
| Account                  | Gmail                    |
| Server Name              | ssl://smtp.gmail.com     |
| Authentication           | password                 |
| Port                     | 465                      |
| User Name                | formazione.vte@gmail.com |
| Password                 | *****                    |
| Requires Authentication? | Yes                      |

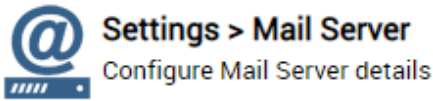
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### Mail Server Settings (IMAP)

Undefined

|                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Account</b>                 | choose the server type from among the ones on the list; if your mail server type is not included choose CUSTOM. Warning! If you use Gmail may not be possible to send email from addresses other than the one shown in this page.                                                                                                                                                                                                                                                                                                               |
| <b>Server Name</b>             | mail server address for SMTP access                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Port</b>                    | indicate the port; the system proposes the default port                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>User Name</b>               | indicate the account to log on to the mail server; usually the same as the complete email address.<br><b>Warning:</b> for a proper configuration, the username ( mail address), must match with the mail address of the admin user. For this reason it should be modified ( eventually just for the initial configuration) , the email address with the one set in the admin Preference.                                                                                                                                                        |
| <b>Password</b>                | access password associated with the account                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Requires Authentication</b> | Yes/No<br><b>Warning:</b> if you are configuring an email server with Office 365, you need to enable the SMTP Authentication option for the specific user on the Office 365 server side before proceeding with the configuration on vtenext. More informations, can be found here:<br><a href="https://learn.microsoft.com/en-us/exchange/clients-and-mobile-in-exchange-online/authenticated-client-smtp-submission">https://learn.microsoft.com/en-us/exchange/clients-and-mobile-in-exchange-online/authenticated-client-smtp-submission</a> |

When you save the data the system will test the entered data, sending a mail to the admin user and an error message will be displayed if it was not possible to send the email (see example in figure).



Test Mail Status : Mail could not be sent to the admin user. Please check the admin email address/Server settings

The main causes that occurs in configuration errors in the smtp server are the following:

- difference between the email in user preferences (visible in USER PREFERENCES under the avatar in the top right corner) and the email actually specified within the SMTP configuration. It is important to remember that the SMTP username (email address) must match the email address of the admin user. For this reason, the email address configured in the admin user's preferences should be changed (even if only for the configuration);
- wrong server name;
- wrong port number;
- wrong password we remember as mentioned above to use the email password.

The SMTP server is used not only for personal mail in the Messages module (optional, as a different SMTP can be set for each mailbox directly in the Messages module) but also for sending emails and notifications through processes. However, for Newsletters, there is a dedicated configuration, for which it is recommended to read **Chapter 6.2.3 Newsletter Configuration (SMTP)**.

**N.B.:** the mail servers on protected SSL port must be specified with the server name ssl://servername (e.g. ssl://smtps.aruba.it).

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