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vTigerCRM Multiple SMTP User Guide

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User Manual For Multiple SMTP Plugin:

Overview:

Multiple SMTP extensions allowing each user to set up their own **Outgoing Server** to send an email. This will be useful when a user needs their own outgoing server.

Features :

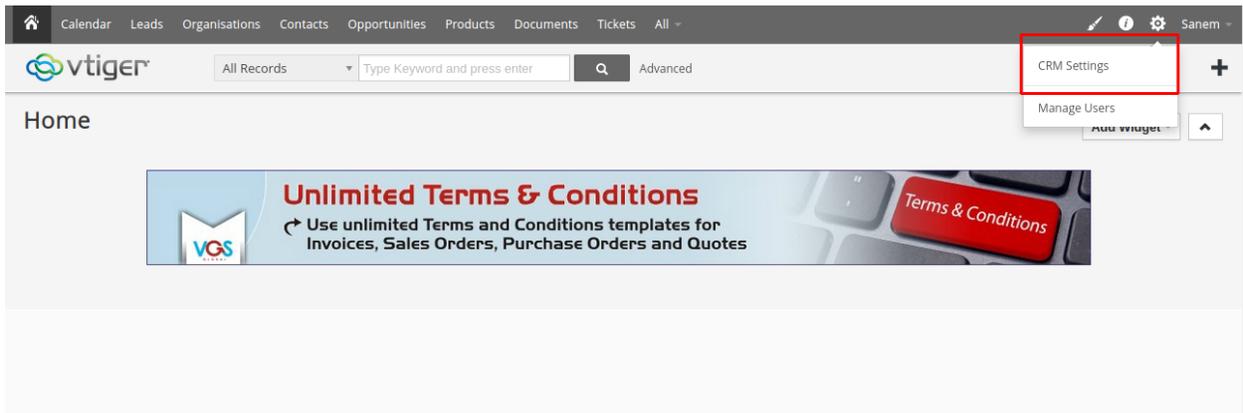
- Admin can configure the outgoing server for their users and also non-admin users can configure their own outgoing server.
- Users can enter their outgoing server details in the My Preference Page.
- Option to send email from workflow using Multiple SMTP.
- Admin can enable and disable Multiple SMTP outgoing servers.

Note : Multiple SMTP Extension only works for the Default & Custom Entity Modules of the vTiger and Send Email functionality from the Workflow using Multiple SMTP Action. Multiple SMTP Extension will not work with email send out from any third-party Extensions.

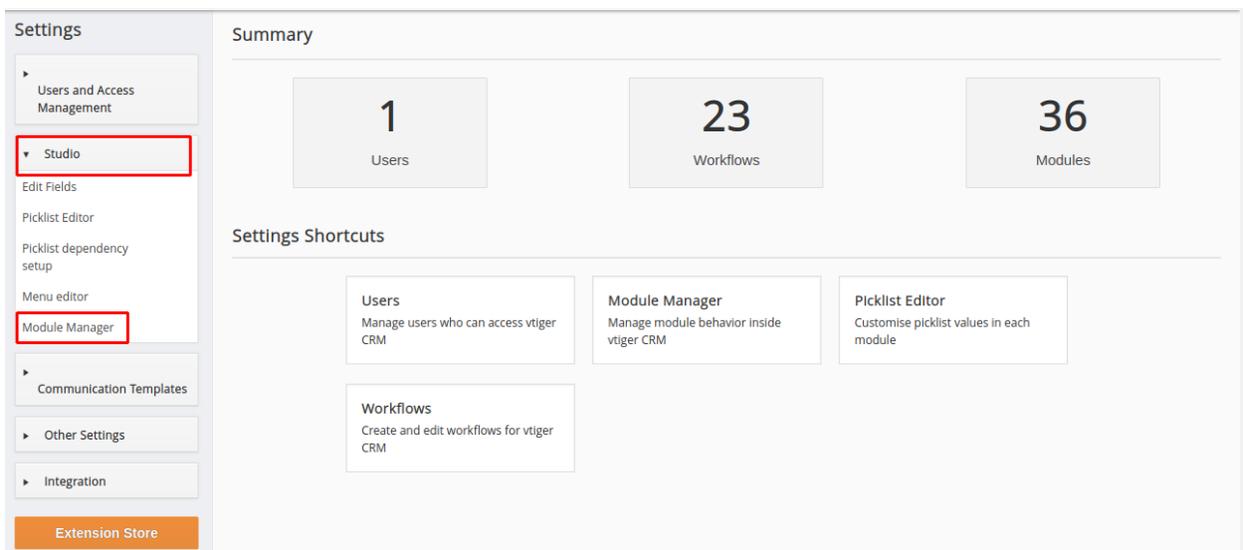
Steps For Installing Multiple SMTP Plugin :

Notes: Before Installing Multiple SMTP Plugin, Please take your vTigerCRM and Database Backup first.

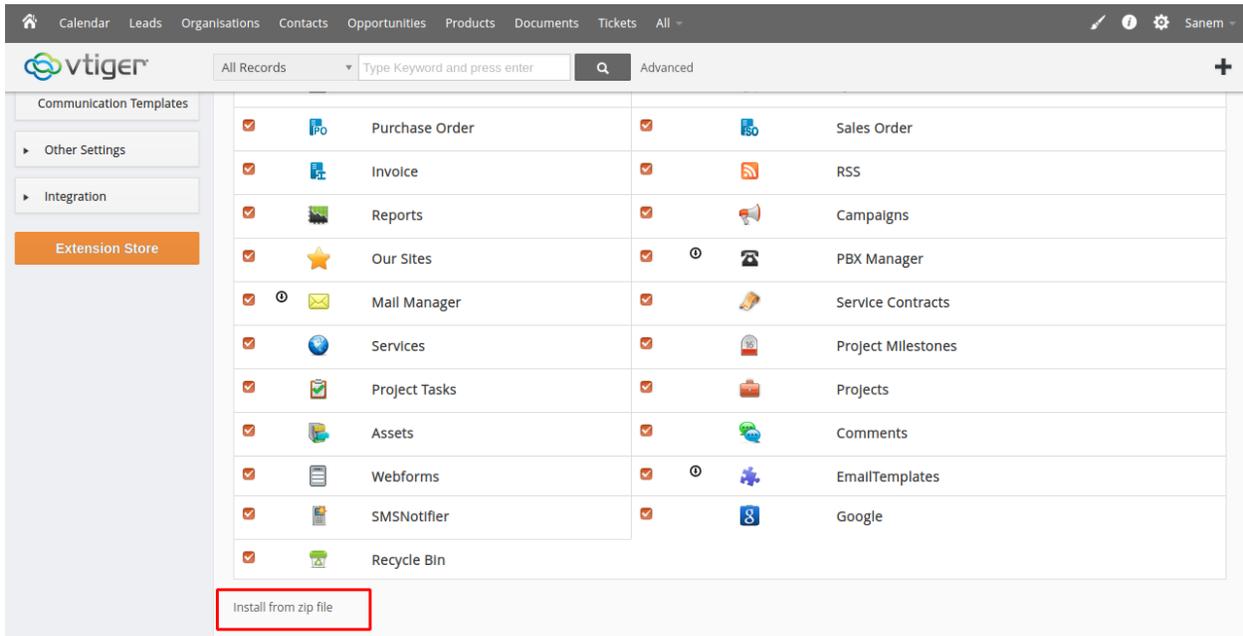
1. Go to the Home page, Click on the **CRM Settings** as shown in the screenshot below.



2. In the CRMSettings open **Studio** Menu, Click the **Module Manager** link as shown in the screenshot below.

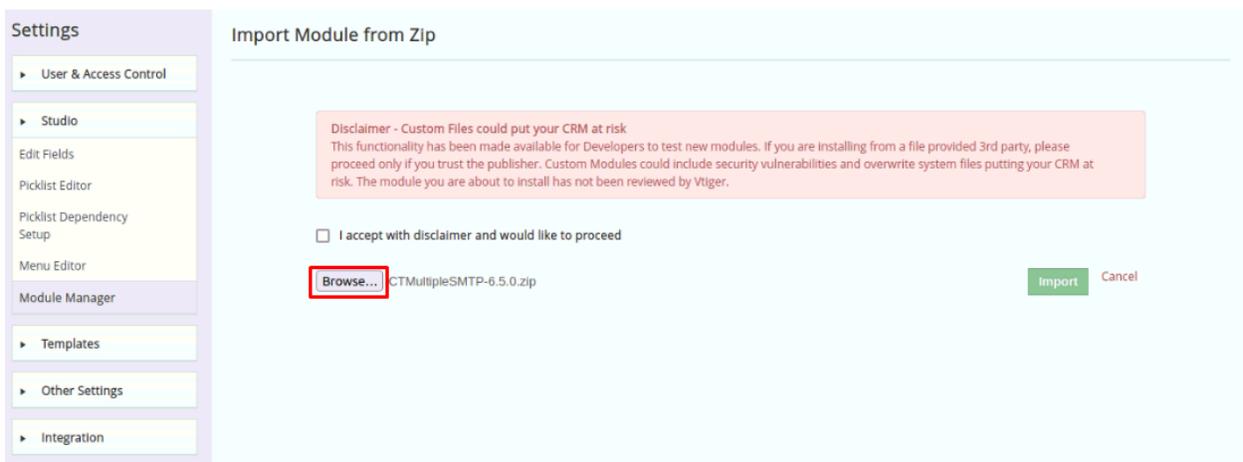


3. In the **Module Manager** Page → Click on the **Import From Zip** Button



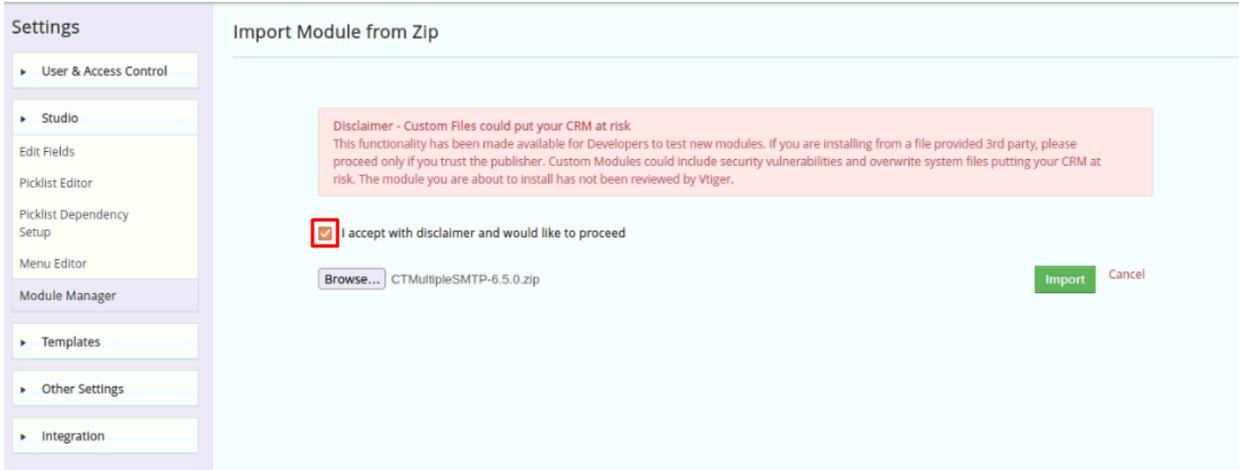
The screenshot shows the CRM Module Manager interface. The top navigation bar includes 'Calendar', 'Leads', 'Organisations', 'Contacts', 'Opportunities', 'Products', 'Documents', 'Tickets', and 'All'. The left sidebar has 'Communication Templates', 'Other Settings', 'Integration', and 'Extension Store' (highlighted in orange). The main area shows a list of modules with checkboxes and icons. At the bottom, the 'Install from zip file' button is highlighted with a red box.

4. In the **Module Manager** Page → Click on the **Browse** Button to select zip file → Click on **Browse** Button to upload the **Multiple SMTP** Plugin(zip file).



The screenshot shows the 'Import Module from Zip' dialog box. A disclaimer is shown: 'Disclaimer - Custom Files could put your CRM at risk. This functionality has been made available for Developers to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules could include security vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Vtiger.' Below the disclaimer is a checkbox 'I accept with disclaimer and would like to proceed'. Below this, the 'Browse...' button is highlighted with a red box, next to the file name 'CTMultipleSMTP-6.5.0.zip'. 'Import' and 'Cancel' buttons are also visible.

5. In the **Module Manager** Page → Check the **Checkbox** Button For Terms and Conditions.



Settings

- ▶ User & Access Control
- ▶ Studio
- Edit Fields
- Picklist Editor
- Picklist Dependency Setup
- Menu Editor
- Module Manager**
- ▶ Templates
- ▶ Other Settings
- ▶ Integration

Import Module from Zip

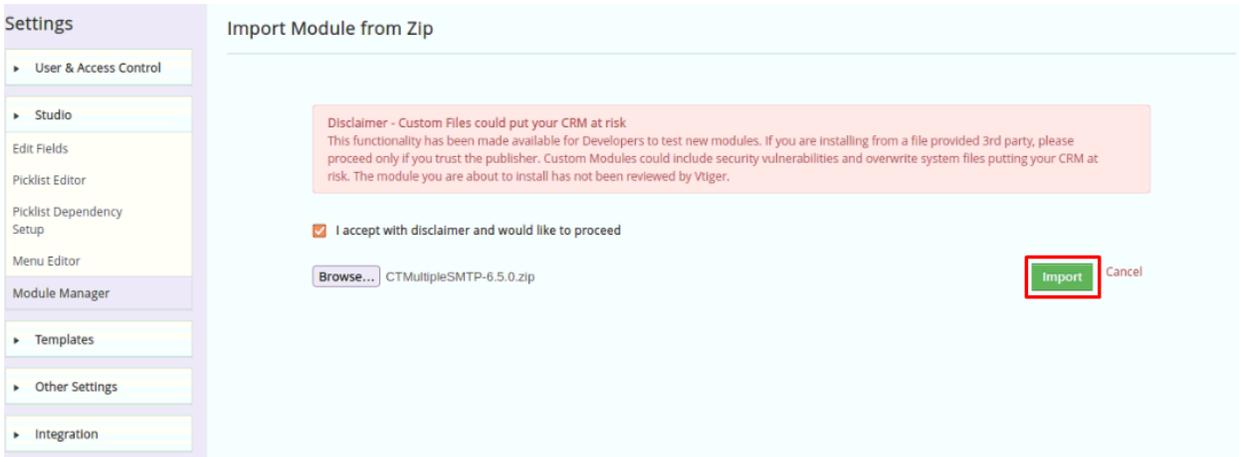
Disclaimer - Custom Files could put your CRM at risk
This functionality has been made available for Developers to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules could include security vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Vtiger.

I accept with disclaimer and would like to proceed

Browse... CTMultipleSMTP-6.5.0.zip

Import Cancel

6. In the **Module Manager** page → Click on the **Import** Button to install **Multiple SMTP** Plugin.



Settings

- ▶ User & Access Control
- ▶ Studio
- Edit Fields
- Picklist Editor
- Picklist Dependency Setup
- Menu Editor
- Module Manager**
- ▶ Templates
- ▶ Other Settings
- ▶ Integration

Import Module from Zip

Disclaimer - Custom Files could put your CRM at risk
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I accept with disclaimer and would like to proceed

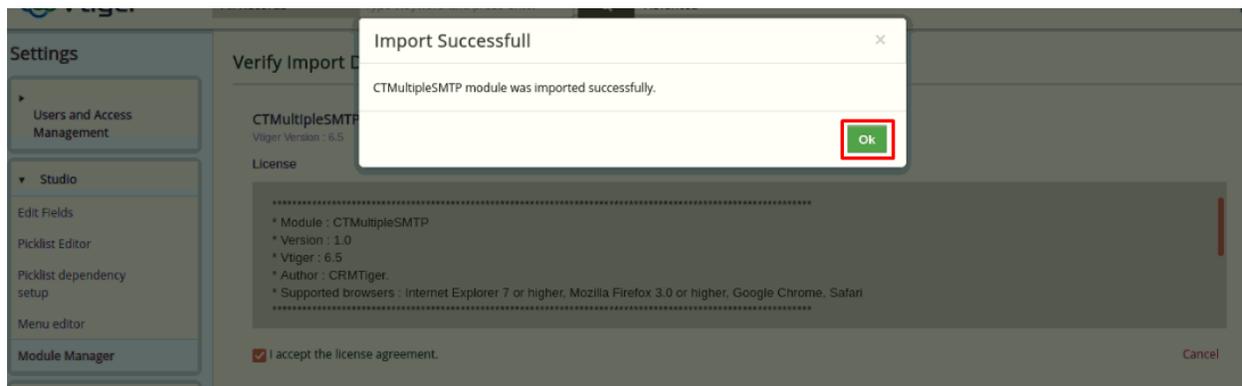
Browse... CTMultipleSMTP-6.5.0.zip

Import Cancel

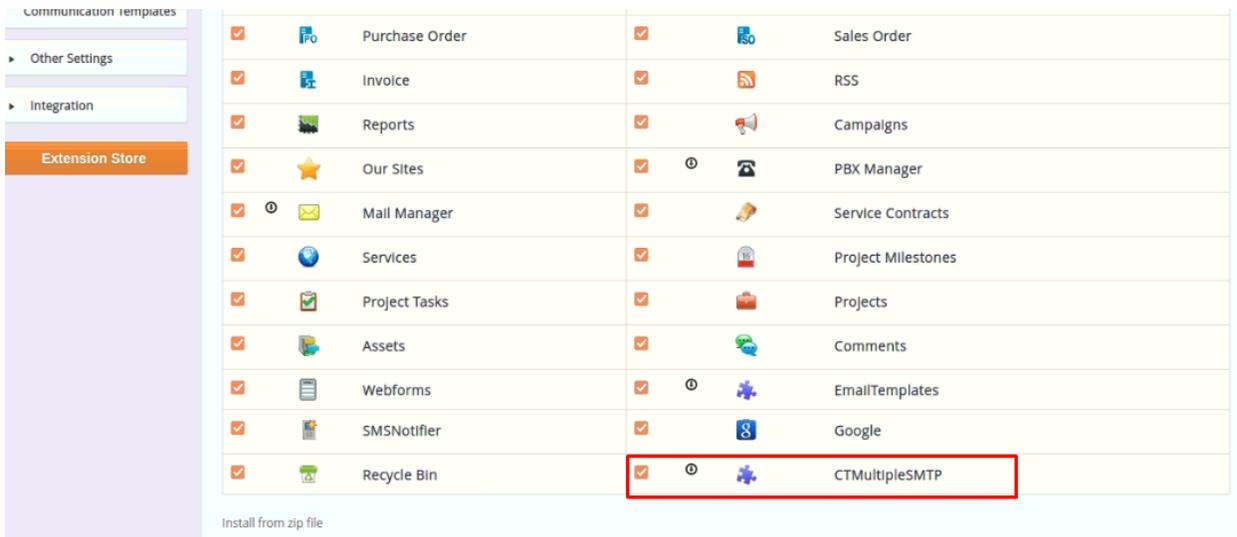
7. To accept the Terms and Conditions, Check the Checkbox Button → Click on the **Import Now** Button.



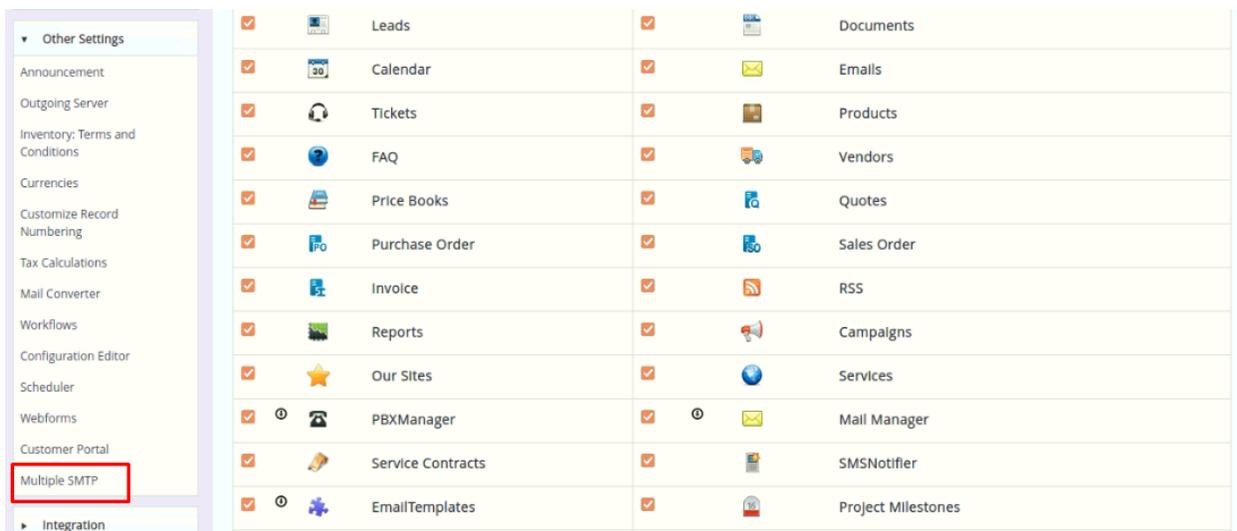
8. To get Popup for Import Successful, Click on the **Ok** Button.



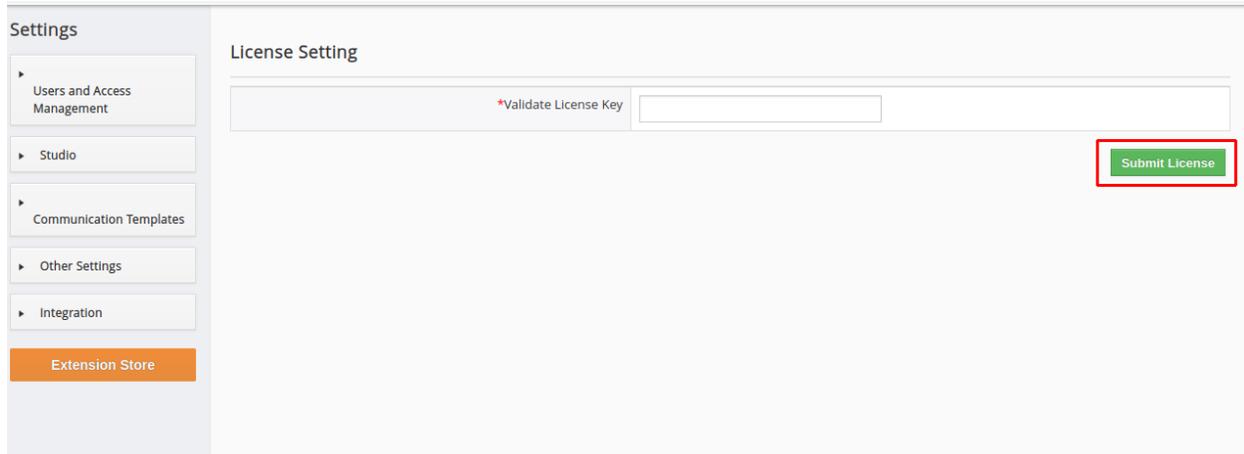
9. After Successful Installation → Now You can see Multiple SMTP Plugins are installed.



10. After Successful Installation you can see the link “Multiple SMTP” on the Other Settings as shown in the below screenshot.



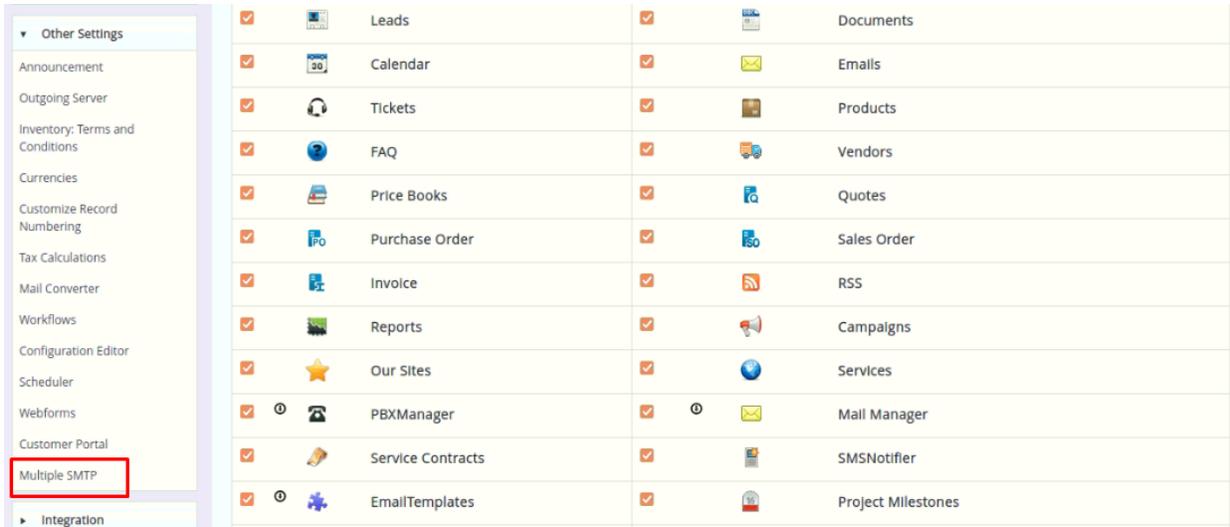
11. Click on Multiple SMTP Link → It asks you to validate License Key → enter valid License Key and click on **Submit License** Button.



The screenshot shows the 'Settings' menu on the left with 'Extension Store' highlighted. The main content area is titled 'License Setting' and contains a form with a text input field labeled '*Validate License Key' and a green 'Submit License' button highlighted with a red box.

Steps For Using Multiple SMTP Features :

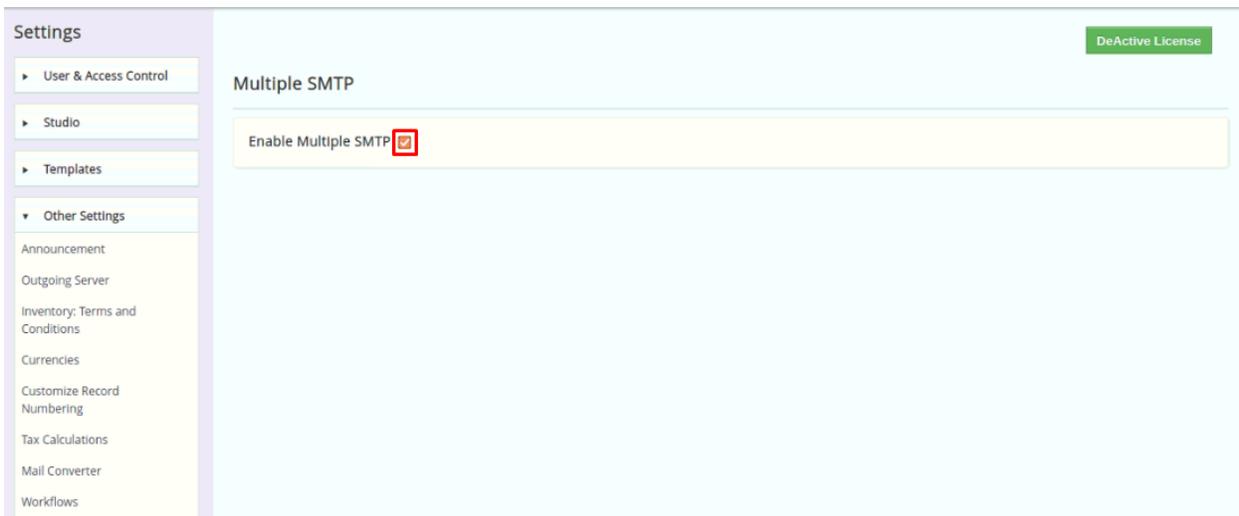
1. In the **CRMSettings** Page → Click on **Other Settings** Menu → Click **Multiple SMTP** Link.



The screenshot shows the 'Other Settings' menu on the left, with 'Multiple SMTP' highlighted in a red box. The main content area displays a grid of 20 settings, each with a checked checkbox and an icon. The settings are:

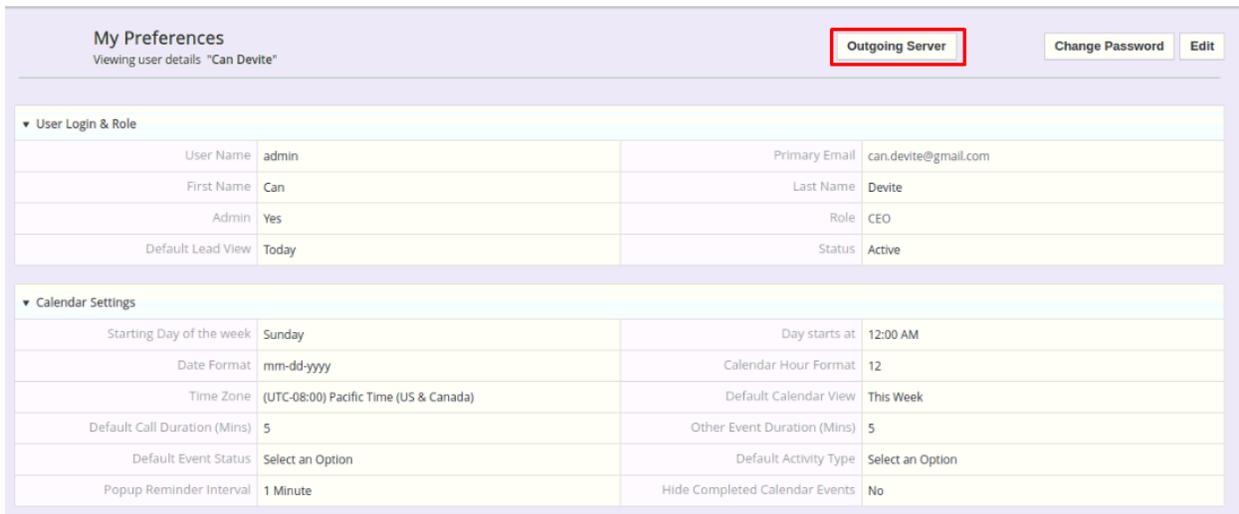
<input checked="" type="checkbox"/>		Leads	<input checked="" type="checkbox"/>		Documents
<input checked="" type="checkbox"/>		Calendar	<input checked="" type="checkbox"/>		Emails
<input checked="" type="checkbox"/>		Tickets	<input checked="" type="checkbox"/>		Products
<input checked="" type="checkbox"/>		FAQ	<input checked="" type="checkbox"/>		Vendors
<input checked="" type="checkbox"/>		Price Books	<input checked="" type="checkbox"/>		Quotes
<input checked="" type="checkbox"/>		Purchase Order	<input checked="" type="checkbox"/>		Sales Order
<input checked="" type="checkbox"/>		Invoice	<input checked="" type="checkbox"/>		RSS
<input checked="" type="checkbox"/>		Reports	<input checked="" type="checkbox"/>		Campaigns
<input checked="" type="checkbox"/>		Our Sites	<input checked="" type="checkbox"/>		Services
<input checked="" type="checkbox"/>		PBXManager	<input checked="" type="checkbox"/>		Mail Manager
<input checked="" type="checkbox"/>		Service Contracts	<input checked="" type="checkbox"/>		SMSNotifier
<input checked="" type="checkbox"/>		EmailTemplates	<input checked="" type="checkbox"/>		Project Milestones

2. On Multiple SMTP Page, Check to Enable Multiple SMTP Checkbox



The screenshot shows the 'Multiple SMTP' settings page. The left sidebar has 'Other Settings' expanded, and 'Multiple SMTP' is selected. The main content area shows the 'Multiple SMTP' section with a checkbox labeled 'Enable Multiple SMTP' which is checked and highlighted with a red box. A 'DeActive License' button is visible in the top right corner.

3. Open My Preference → Click On the **Outgoing Server** Button to set outgoing mail configuration. (**Note:** If Multiple SMTP checkbox is not checked then Outgoing Server Button will not be displayed)

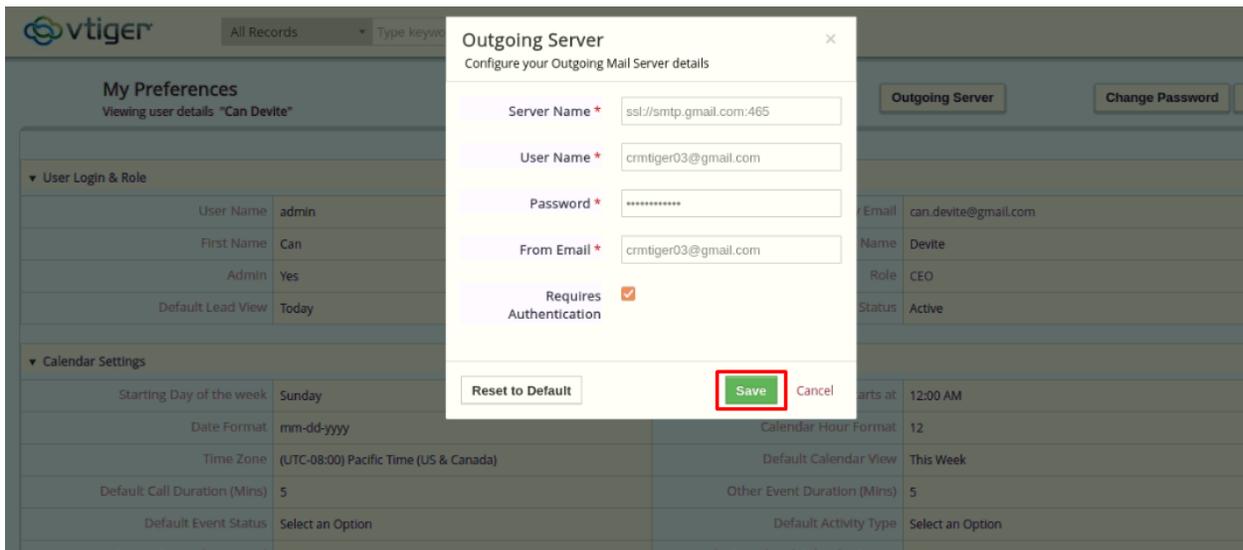


The screenshot shows the 'My Preferences' page for user 'Can Devite'. The 'Outgoing Server' button is highlighted with a red box. Below it are two sections: 'User Login & Role' and 'Calendar Settings'.

User Login & Role			
User Name	admin	Primary Email	can.devite@gmail.com
First Name	Can	Last Name	Devite
Admin	Yes	Role	CEO
Default Lead View	Today	Status	Active

Calendar Settings			
Starting Day of the week	Sunday	Day starts at	12:00 AM
Date Format	mm-dd-yyyy	Calendar Hour Format	12
Time Zone	(UTC-08:00) Pacific Time (US & Canada)	Default Calendar View	This Week
Default Call Duration (Mins)	5	Other Event Duration (Mins)	5
Default Event Status	Select an Option	Default Activity Type	Select an Option
Popup Reminder Interval	1 Minute	Hide Completed Calendar Events	No

4. On the MultipleSMTP (Outgoing Mail Configuration) page, Fill all the Email Configuration Details → Click on the **Save** Button to save Email Configuration Details. (**Note:** If all the Email Configuration Detail valid then it gives a message to save the outgoing server otherwise it gives an error like can not save outgoing server details)

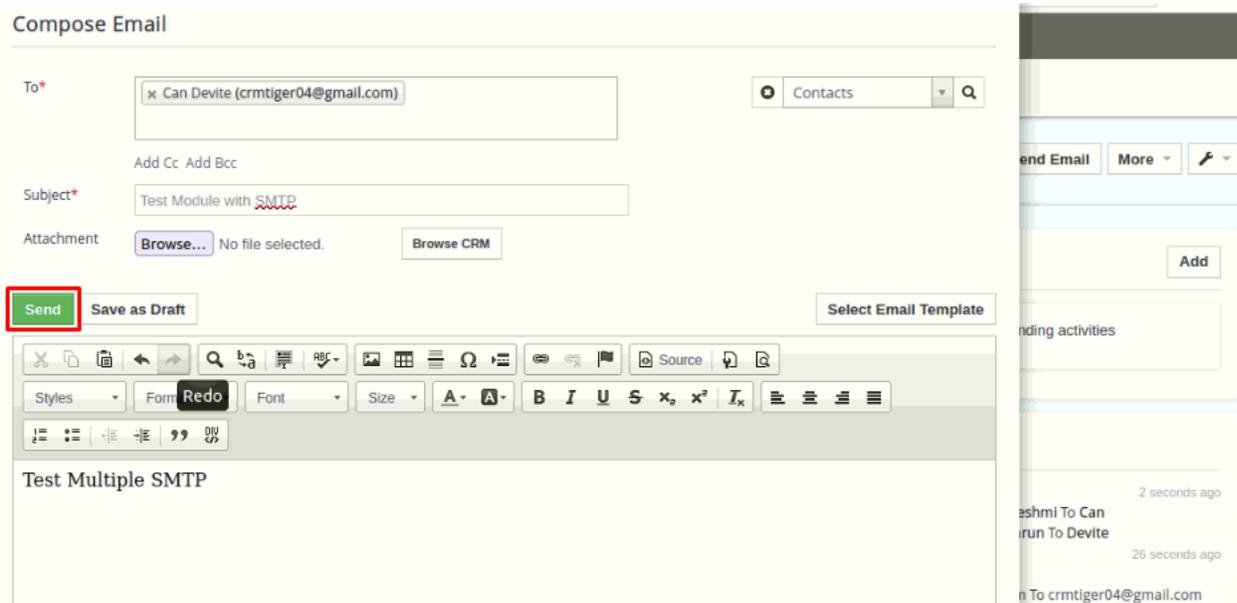


The screenshot shows the 'Outgoing Server' configuration dialog box. The 'Save' button is highlighted with a red box. The dialog box contains the following fields:

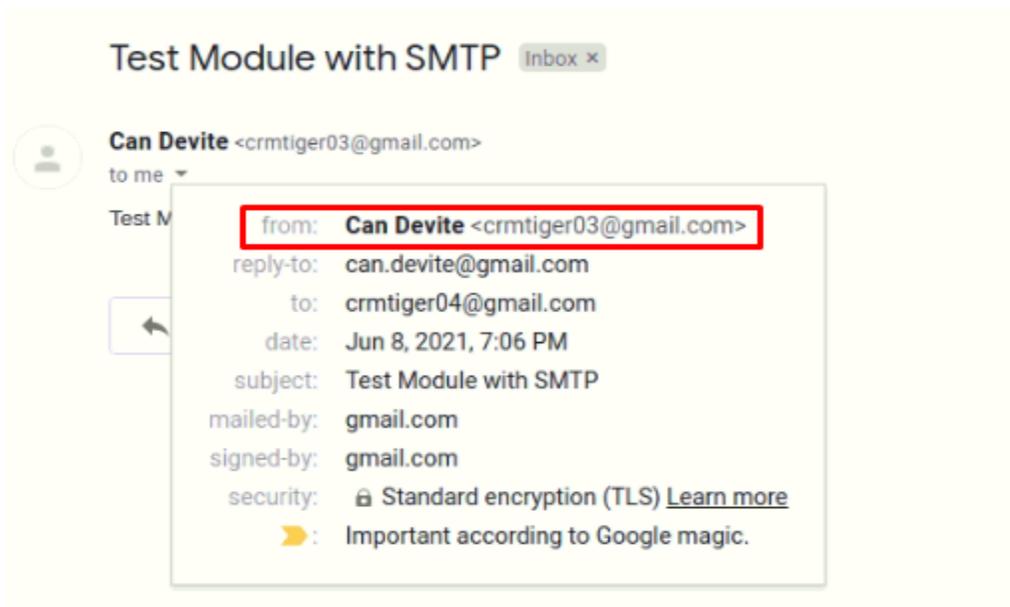
- Server Name: ssl://smtp.gmail.com:465
- User Name: crmtiger03@gmail.com
- Password: [Redacted]
- From Email: crmtiger03@gmail.com
- Requires Authentication:

Buttons: Reset to Default, Save, Cancel

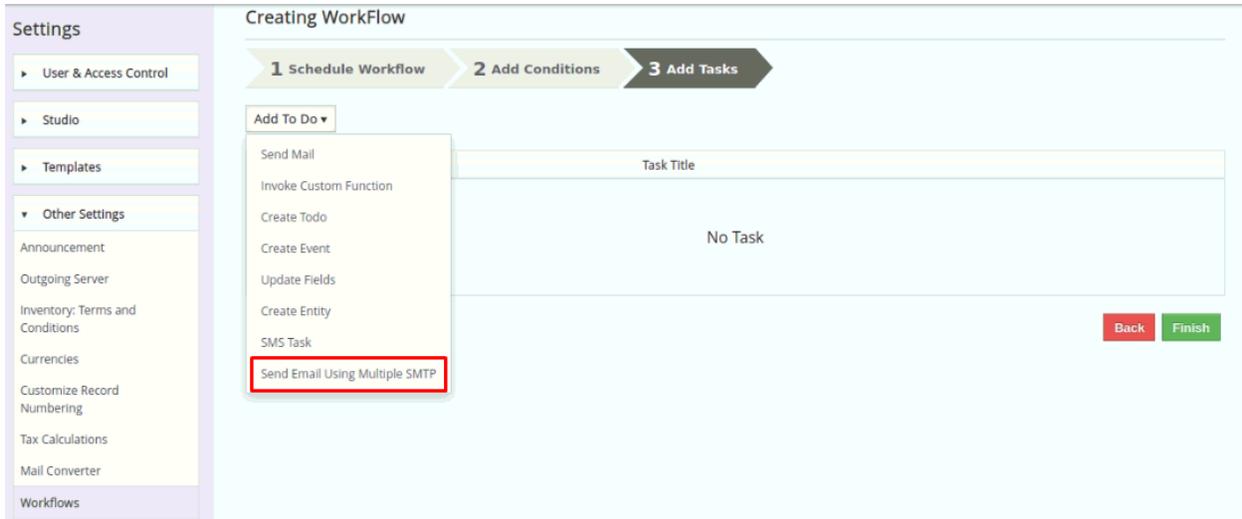
5. After saving the Outgoing Server Details, Go to any Module and Click on the Email Address from the Record or Click on the “**Send**” Action from the Listview/Detail View, It'll open the Email Popup.



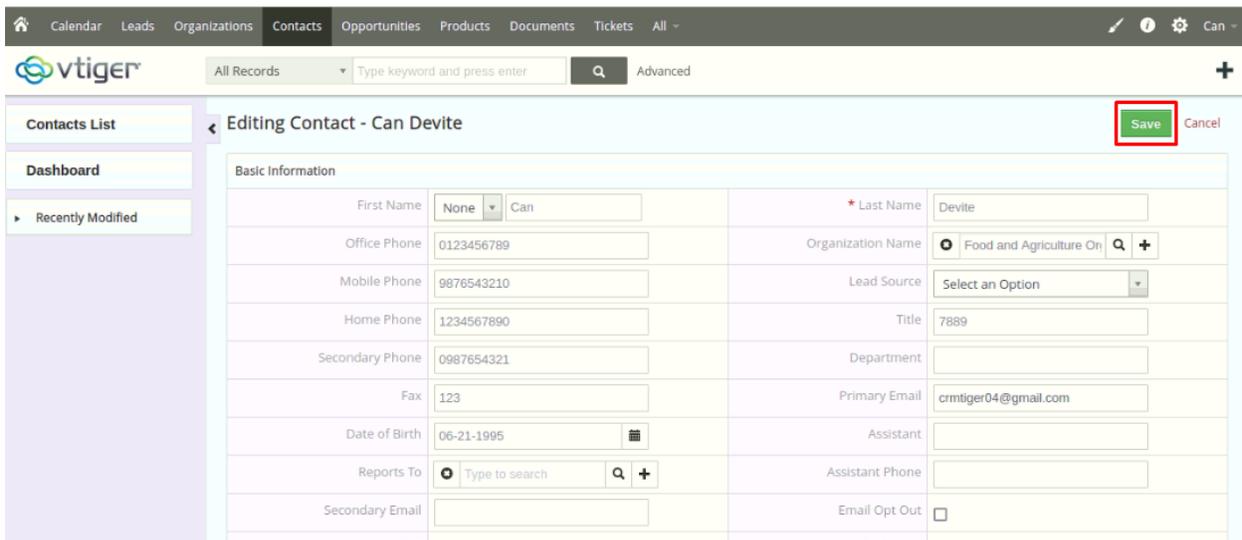
6. After filling up all the Details, Click on the Send Email Button and you will receive an email like the below screenshot.



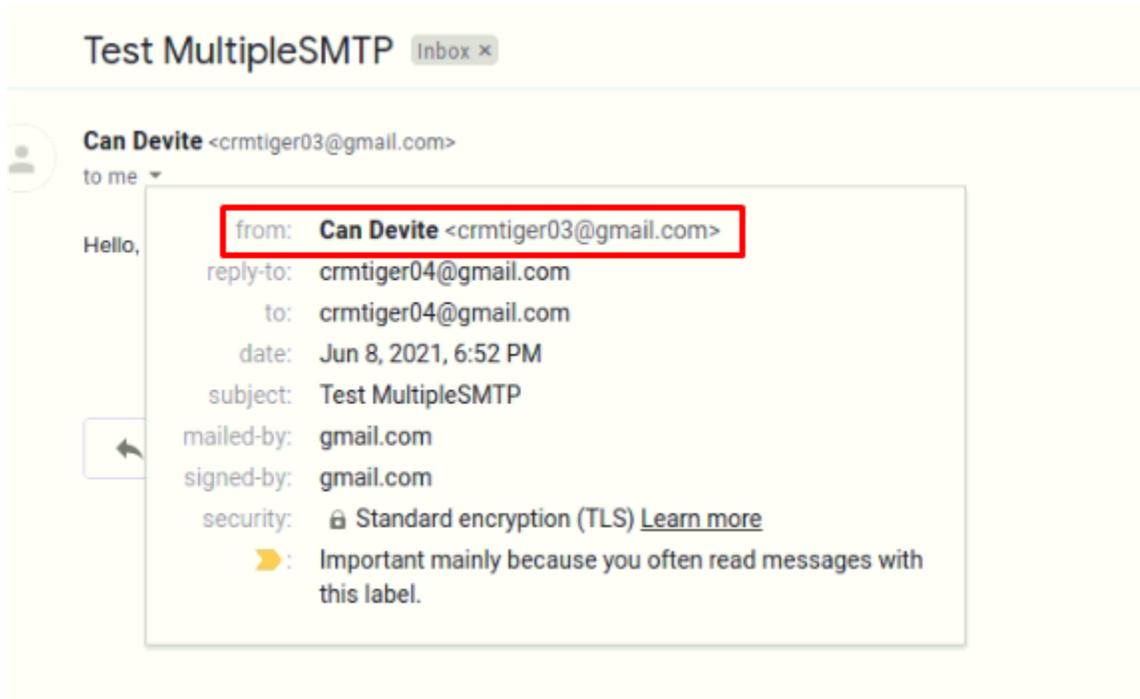
7. In the workflow, to send email using multiple SMTP servers, select action “**Send Email Using Multiple SMTP**” link (**Note:** If Multiple SMTP checkbox is not checked then send Email Using Multiple SMTP link will not be displayed)



8. After Configure the Workflow for a particular Module, Go to Module and Create Record. Once you save/update the Record, based on the Condition mentioned in the Workflow if Condition match with Record then Workflow will Trigger for “**Send Email using the Multiple SMTP**” Action which you configured in the Workflow



9. Once Workflow Triggers, Email will be received as per below Screenshot.



Scenario for Multiple SMTP :

1. If Admin Enables Multiple SMTP and configures his Multiple SMTP outgoing servers then it will consider Admin Multiple Outgoing Server while Sending Emails.
2. If a Non-Admin User sets Multiple SMTP then it will consider Non-Admin User Outgoing Server while Sending Emails.
3. If Non-Admin does not set Multiple SMTP outgoing servers then it will consider Super Admin Multiple SMTP Server while Sending Emails and If Super doesn't configured the Multiple SMTP then it'll consider the Default Outgoing Server of the CRM.
4. If Admin Enables Multiple SMTP and does not Configure Multiple SMTP then it will consider the Default Outgoing Server of the CRM.
5. If Admin Disables Multiple SMTP then it will consider the Default Outgoing Server of the CRM.