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vTigerCRM Multiple SMTP User Guide

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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.

Settings	Summary				
 Users and Access Management 	1		23		36
 ✓ Studio Edit Fields 	Users		Workflows		Modules
Picklist Editor Picklist dependency setup	Settings Shortcuts				
Menu editor Module Manager	Users Manage users wh CRM	No can access vtiger N	Vodule Manager Manage module behavior inside rtiger CRM	Picklist Editor Customise picklist val module	lues in each
Communication Templates	Workflows				
 Other Settings 	Create and edit w CRM	orkflows for vtiger			
 Integration 					
Extension Store					



😒 vtiger [.]	All Records	5	 Type Keyword and press enter 	Q Advi	anced			
Communication Templates			Duurshaan Orden				Salaa Ordan	
Other Settings		PO	Purchase Order	-		ISO	Sales Order	
Integration		5	Involce			2	RSS	
Integration		~	Reports			-	Campaigns	
Extension Store		*	Our Sites		٩		PBX Manager	
	🛛 🖸) 🖂	Mail Manager			٩	Service Contracts	
		۷	Services			16	Project Milestones	
		2	Project Tasks				Projects	
		6	Assets				Comments	
			Webforms		٩	4	EmailTemplates	
			SMSNotifier			8	Google	
			Recycle Bin					

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

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

ettings	Import Module from Zip
 User & Access Control 	
Studio Edit Fields	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
Picklist Editor	proceed only if you trust the publisher. Lustom Modules Could include security vulnerabilities and overwrite system files putting your CKM at risk. The module you are about to install has not been reviewed by Vtiger.
Picklist Dependency Setup	I accept with disclaimer and would like to proceed
Menu Editor	Browse CTMultipleSMTP-6.5.0.zip Cancel
Module Manager	
Templates	
Other Settings	
► Integration	



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

Settings	Import Module from Zip
 User & Access Control 	
Studio Edit Fields Picklist Editor	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.
Picklist Dependency Setup	I accept with disclaimer and would like to proceed
Menu Editor Module Manager	Browse CTMultipleSMTP-6.5.0.zip Cancel
Templates	
 Other Settings 	
 Integration 	

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

Settings	Import Module from Zip
 User & Access Control 	
Studio Edit Fields	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 your test the nullhiese Custom Modules could include security wheersplittee and consurts putter putter your CRM at
Picklist Editor	risk. The module you are about to install has not been reviewed by Vtiger.
Picklist Dependency Setup	I accept with disclaimer and would like to proceed
Menu Editor	Browse CTMultipleSMTP-6.5.0.zip Cancel
Module Manager	
 Templates 	
 Other Settings 	
 Integration 	



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

Settings	Verify Import Details	
 Users and Access Management 	CTMultipleSMTP Vnger Version : 6.5	
Studio Edit Fields Picklist Editor Picklist dependency setup Menu editor		
Module Manager Communication Templates Other Settings Integration	C Import Now	ancel

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

Settings	Verify Import F	Import Successfull	×	
		CTMultipleSMTP module was imported successfully.		
Users and Access Management	CTMultipleSMTP Vtiger Version : 6.5		Ok	
✓ Studio	License		_	
Edit Fields	* Module : CTM	ItinleSMTD		
Picklist Editor	* Version : 1.0			
Picklist dependency setup	* Author : CRMT * Supported bro	iger. wsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher, Google Chrome, S	afari	
Menu editor				
Module Manager	🔽 i accept the licen:	se agreement.		



communication remplates						
Other Cathlers		PO	Purchase Order		SO	Sales Order
Other Settings		5	Invoice		2	RSS
 Integration 			Reports		e	Campaigns
Extension Store		*	Our Sites	٩		PBX Manager
	0	\bowtie	Mall Manager		٩	Service Contracts
		۲	Services		16	Project Milestones
		2	Project Tasks		2	Projects
		B	Assets		R	Comments
			Webforms	٩	*	EmailTemplates
			SMSNotifier		8	Google
			Recycle Bin	٩	*	CTMultipleSMTP
	Install from	n zip file				

9. After Successful Installation \rightarrow 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.

					1000	
Other Settings		0.0	Leads		0.5	Documents
nouncement		30	Calendar		\bowtie	Emalls
going Server		Q	Tickets			Products
entory: Terms and nditions		2	FAQ		.	Vendors
rencies		<i>a</i>	Price Books		6	Quotes
mbering		PO	Purchase Order		so	Sales Order
x Calculations		5	Invoice		2	RSS
rkflows			Reports		a	Campaigns
figuration Editor					U *	
duler		*	Our Sites		۷	Services
bforms	v		PBXManager	٩	\bowtie	Mall Manager
stomer Portal		Þ	Service Contracts		Ē	SMSNotifier
nuple SMTP	o	*	EmailTemplates		16	Project Milestones
Integration		~				-



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

Settings		
 Users and Access Management 	tValidate License Key	
► Studio	Submit License	Ī
Communication Templates		
 Other Settings 		
 Integration 		
Extension Store		



Steps For Using Multiple SMTP Features :

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

▼ Other Settings			Leads			Documents
Announcement		30	Calendar		\bowtie	Emails
Outgoing Server		Q	Tickets			Products
Inventory: Terms and Conditions		2	FAQ		.	Vendors
Currencies		<i>_</i>	Price Books		6	Quotes
Numbering		PO	Purchase Order		So	Sales Order
Mail Converter		5	Invoice		2	RSS
Workflows			Reports		ç]	Campaigns
Configuration Editor		*	Our Sites		0	Services
Webforms	v		PBXManager	٩		Mail Manager
Customer Portal		٩	Service Contracts		Ē	SMSNotifier
	0	*	EmailTemplates		16	Project Milestones
- Integration						

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

Settings	DeActive License
 User & Access Control 	Multiple SMTP
► Studio	
 Templates 	
▼ Other Settings	
Announcement	
Outgoing Server	
Inventory: Terms and Conditions	
Currencies	
Customize Record Numbering	
Tax Calculations	
Mail Converter	
Workflows	



3. Open My Preference \rightarrow 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)

My Preferences Viewing user details "Can Det	/ite"	0	Ltgoing Server Change Password Edit
▼ 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 \rightarrow 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)

		ords 🔹 Type keywo	Outgoing Server		×		
			Configure your Outgoing Ma	lail Serv	er details		
l	My Preferences Viewing user details "Can Dev	/ite"	Server Name *	ssl://s	mtp.gmail.com:465	0	utgoing Server Change Password
l	▼ User Login & Role		User Name *	crmtiç	ger03@gmail.com		
l		admin	Password *	•••••	****	r Email	can.devite@gmail.com
l		Can	From Email *	crmtiç	ger03@gmail.com	Name	Devite
	Admin	Yes		_		Role	CEO
l	Default Lead View	Today	Requires Authentication	~		Status	Active
l	▼ Calendar Settings						
I	Starting Day of the week	Sunday	Reset to Default		Save Cancel	arts at	12:00 AM
		mm-dd-yyyy			Calendar Hour	Format	12
		(UTC-08:00) Pacific Time (US &	(Canada)				This Week
		5					5
		Select an Option					Select an Option



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.

Compose E	mail		
To*	😠 Can Devite (crmtiger04@gmail.com)	O Contacts V Q	
	Add Cc Add Bcc		end Email More 👻 🗲 👻
Subject*	Test Module with SMTP		
Attachment	Browse No file selected. Browse CRM		Add
Send Save	as Draft ◆ ◇ Q. \$3 厚 ♥・ ☑ 亜 Ξ Ω 座 ● □ ■ Form Redo Font → Size → ▲・ 函・ B I 및 非 ?? ※	Select Email Template © Source ♀ & S × ₂ × ² I _x ≥ ± ± ≡	nding activities
Test Multip	le SMTP		2 seconds ago eshmi To Can run To Devite 26 seconds ago
			n To crmtiger04@gmail.com

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)

Settings	Creating WorkFlow			
User & Access Control	1 Schedule Workflow	2 Add Conditions	3 Add Tasks	
► Studio	Add To Do 🔻			
Templates	Send Mail Invoke Custom Function		Task Title	
 Other Settings 	Create Todo			
Announcement	Create Event		No Task	
Outgoing Server	Update Fields			
Inventory: Terms and Conditions	Create Entity			Back Finish
Currencies	Send Email Lising Multiple SMTP			
Customize Record Numbering	Send Entill Osing Moraple Shift			
Tax Calculations				
Mail Converter				
Workflows				

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

😚 Calendar Leads Org	ganizati	ons Contacts	Opportunities	Products Do	ocuments Ti	ickets All	-			/	0	🔅 Can -
🕲 vtiger [.]	All	Records	▼ Type keyword	i and press ente	er Q	Advar	nced					+
Contacts List	< E	Editing Cont	act - Can De	vite							Save	Cancel
Dashboard		Basic Information	n									
Recently Modified			First Name	None 🔻 Ci	an			*	Last Name	Devite		
			Office Phone	0123456789				Organiz	ation Name	Food and Agriculture Ori	+	
			Mobile Phone	9876543210				l	ead Source	Select an Option	Ŧ	
			Home Phone	1234567890					Title	7889		
		Se	condary Phone	0987654321				t	Department			
			Fax	123				Pr	imary Email	crmtiger04@gmail.com		
			Date of Birth	06-21-1995		曲			Assistant			
			Reports To	O Type to se	earch	۹ +		Assis	stant Phone			
		S	econdary Email					En	nail Opt Out			
			Do Not Call	_					Poforonco	-		



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

an Dev	/ite <crmtiger< th=""><th>03@gmail.com></th></crmtiger<>	03@gmail.com>
Hello.	from:	Can Devite <crmtiger03@gmail.com></crmtiger03@gmail.com>
	reply-to:	crmtiger04@gmail.com
	to:	crmtiger04@gmail.com
	date:	Jun 8, 2021, 6:52 PM
	subject:	Test MultipleSMTP
4	mailed-by:	gmail.com
	signed-by:	gmail.com
	security:	Standard encryption (TLS) Learn more
	2:	Important mainly because you often read messages with this label.

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.
- 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.