

**vTigerCRM MultipleSMTP
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 :

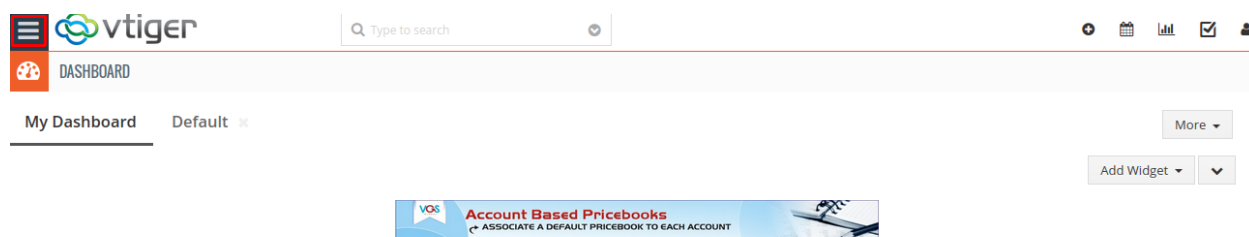
- Admin can configure the outgoing server for their users and also non-admin users can configure their own outgoing server.
- Users can enter their outgoing server details in the My Preference Page.
- Option to send email from workflow using Multiple SMTP.
- Admin can enable and disable Multiple SMTP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

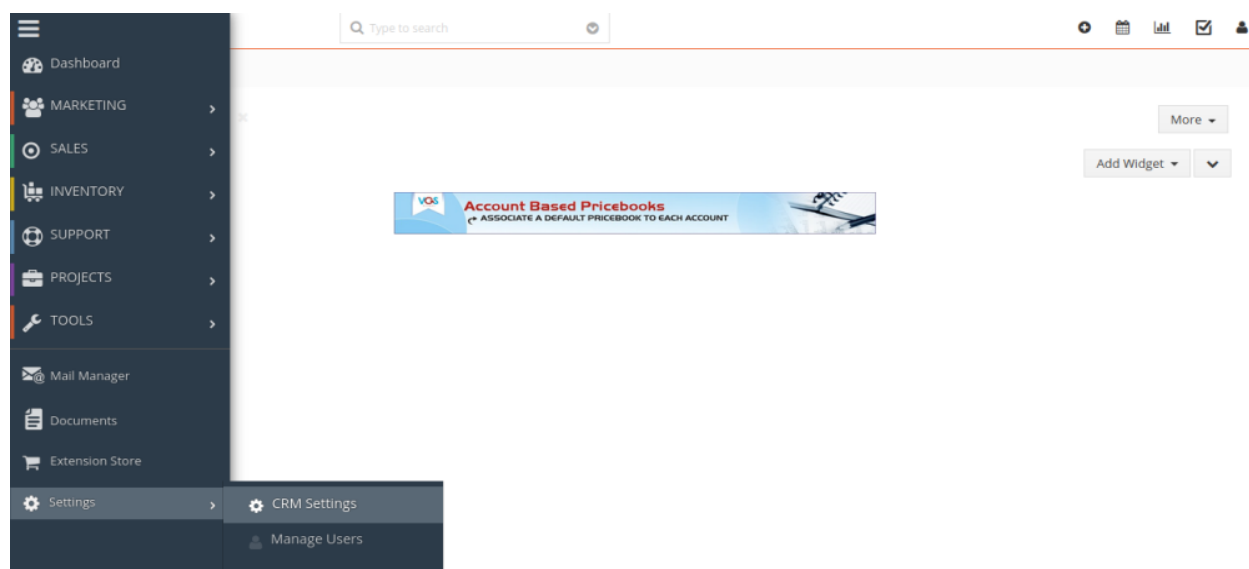
Steps For Installing Multiple SMTP Plugin :

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

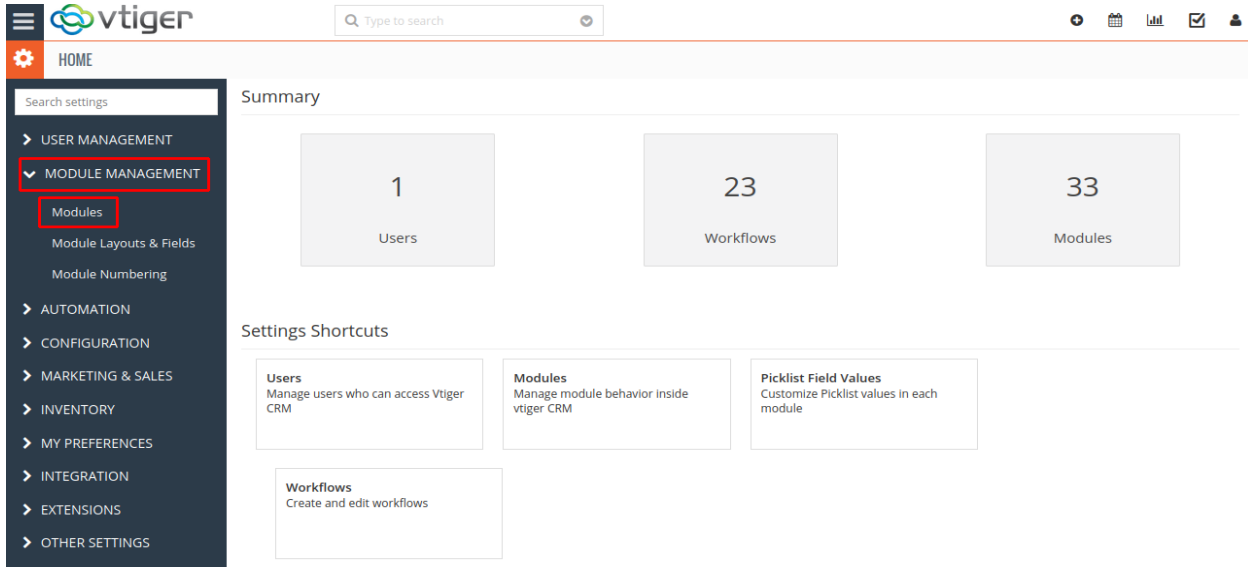
1. Go to the Dashboard page, Click on the Menu as shown in the screenshot below.



2. To open the “**Settings**” Page, Click on the **CRMSettings** as shown in the screenshot below.

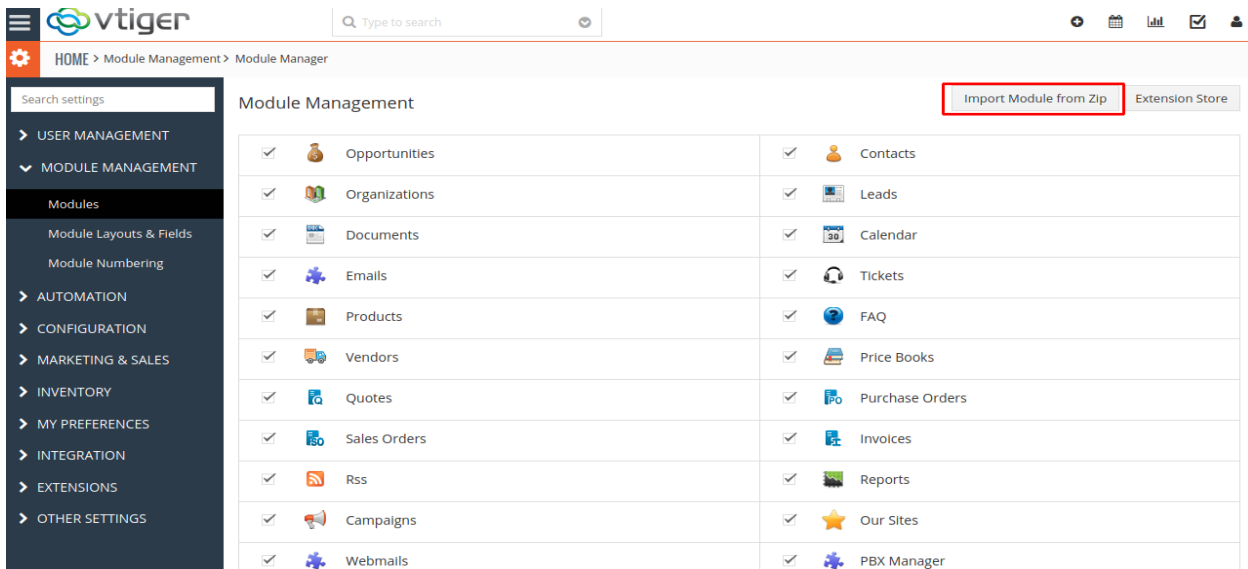


3. In the CRMSettings, Open **Module Management** Menu, Click the **Modules** link as shown in the screenshot below.



The screenshot shows the CRM Settings interface. On the left, the 'MODULE MANAGEMENT' menu is expanded, and the 'Modules' link is highlighted. The main content area displays a 'Summary' section with three cards: '1 Users', '23 Workflows', and '33 Modules'. Below this is a 'Settings Shortcuts' section with four cards: 'Users', 'Modules', 'Picklist Field Values', and 'Workflows'.

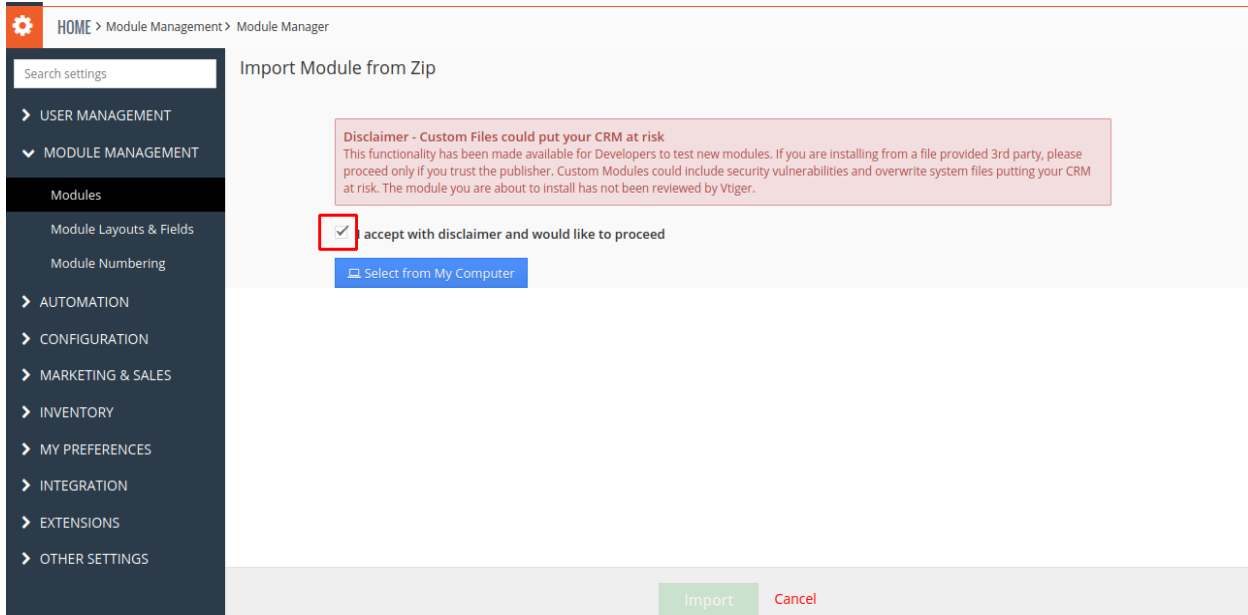
4. In the **Module Manager** Page → Click on the **Import Module From Zip** Button



The screenshot shows the CRM Module Manager interface. The left sidebar shows the 'MODULE MANAGEMENT' menu with 'Modules' highlighted. The main content area shows a list of modules with checkboxes. The 'Import Module From Zip' button is highlighted in the top right corner.

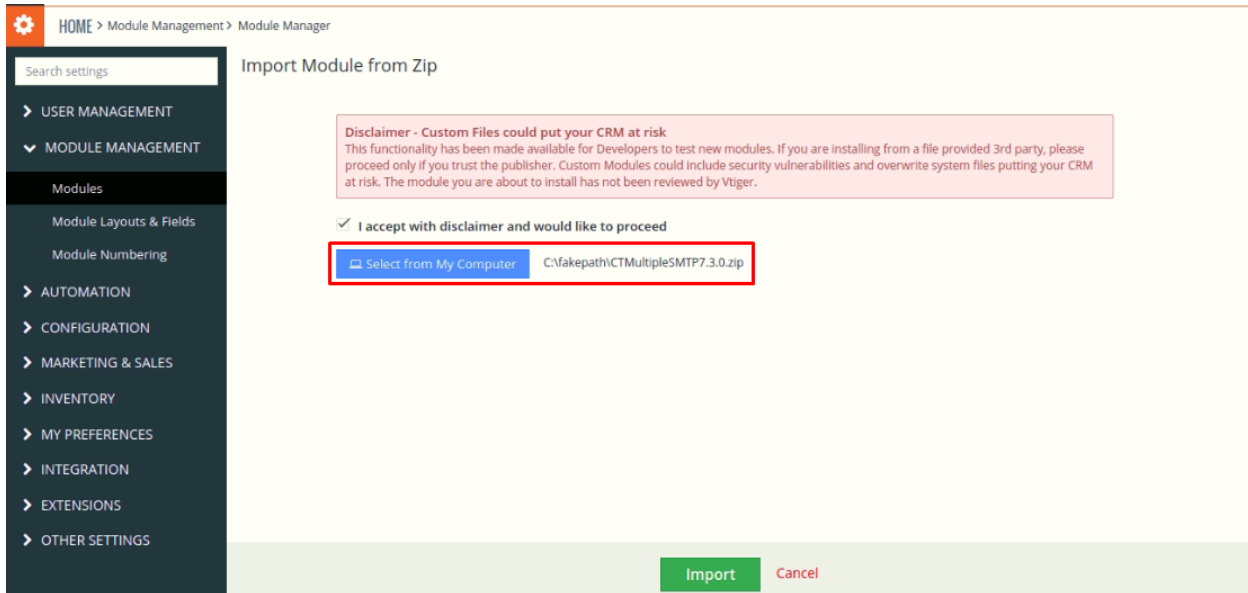
Module	Module
<input checked="" type="checkbox"/> Opportunities	<input checked="" type="checkbox"/> Contacts
<input checked="" type="checkbox"/> Organizations	<input checked="" type="checkbox"/> Leads
<input checked="" type="checkbox"/> Documents	<input checked="" type="checkbox"/> Calendar
<input checked="" 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 Orders
<input checked="" type="checkbox"/> Sales Orders	<input checked="" type="checkbox"/> Invoices
<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"/> Webmails	<input checked="" type="checkbox"/> PBX Manager

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

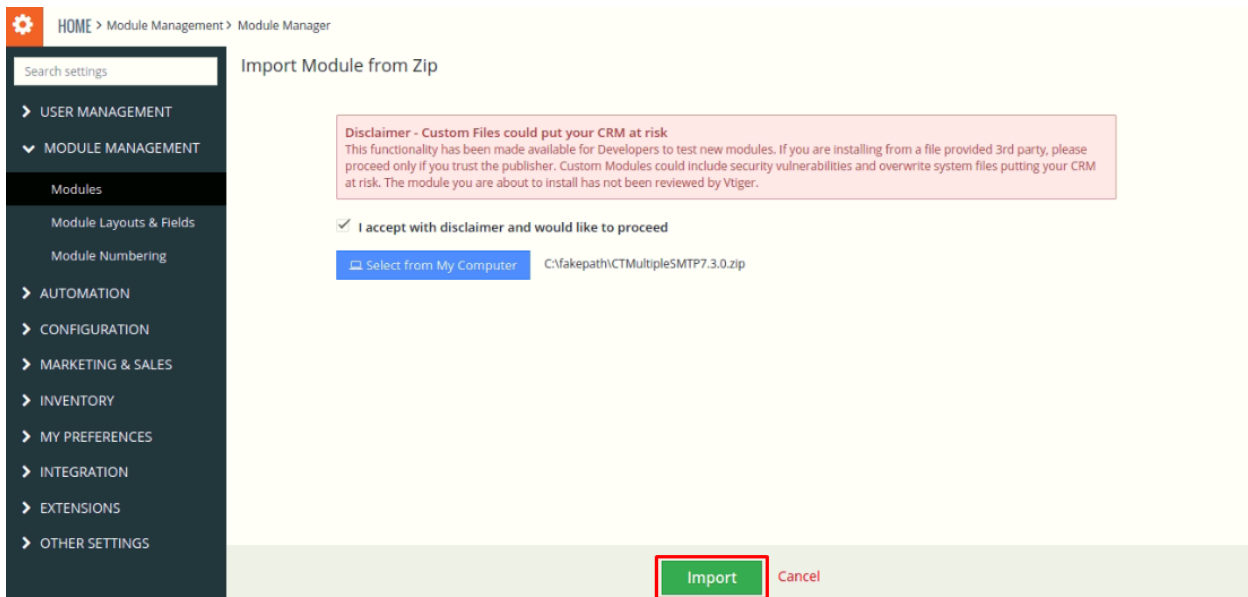


The screenshot shows the CRM Tiger Module Manager interface. On the left is a sidebar with a search bar and a list of settings categories: USER MANAGEMENT, MODULE MANAGEMENT (expanded), AUTOMATION, CONFIGURATION, MARKETING & SALES, INVENTORY, MY PREFERENCES, INTEGRATION, EXTENSIONS, and OTHER SETTINGS. Under 'MODULE MANAGEMENT', 'Modules' is selected. The main content area is titled 'Import Module from Zip'. It features a red-bordered disclaimer box with the text: '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 with a checkmark, followed by the text 'accept with disclaimer and would like to proceed'. A blue button labeled 'Select from My Computer' is positioned below the checkbox. At the bottom right of the main area are two buttons: 'Import' (green) and 'Cancel' (red).

6. In the **Module Manager** Page → Click on the **Select From My Computer** Button to select zip file → Click on **Select From My Computer** Button to upload the **Multiple SMTP** Plugin(zip file).



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



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



HOME > Module Management > Module Manager

Search settings

USER MANAGEMENT

MODULE MANAGEMENT

AnyDesk

Modules

Module Layouts & Fields

Module Numbering

AUTOMATION

CONFIGURATION

MARKETING & SALES

INVENTORY

MY PREFERENCES

INTEGRATION

EXTENSIONS

OTHER SETTINGS

Verify Import Details

CTMultipleSMTP

Vtiger Version : 7.3.0

License

```

*****
* Module       : CTMultipleSMTP
* Version      : 1.0
* Vtiger       : 7.3.0
* Author       : CRMTiger.
* Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher, Google Chrome, Safari
*****

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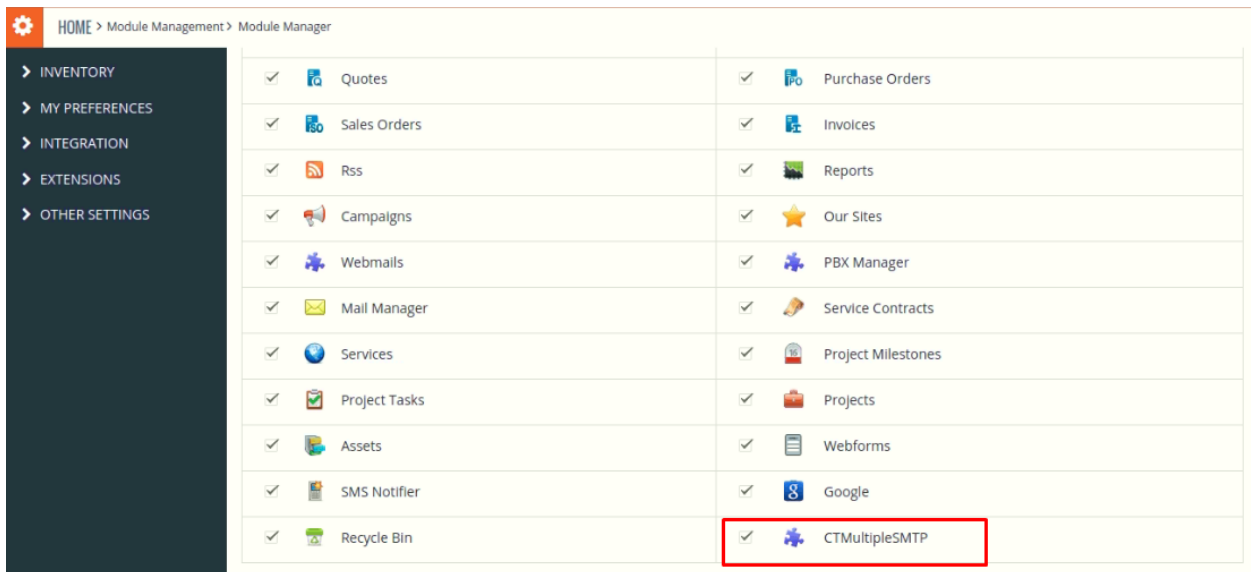
Terms and Conditions:

No Warranty. The Software is provided "as is" without warranty of any kind, either express or implied, including without limitation any implied warranties of condition, uninterrupted use, merchantability, fitness for a particular purpose, or non-infringement.

☒ accept the license agreement.

Import Now Cancel

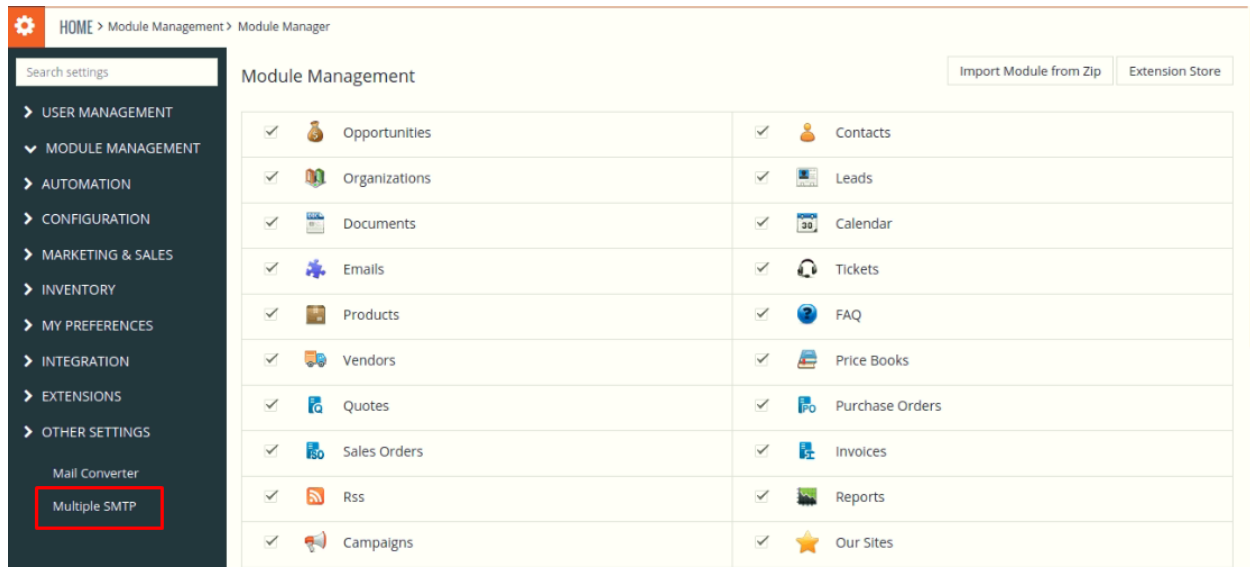
9. After Successful Installation → It redirects you to Module Manager and Now You can see Multiple SMTP Plugins are installed.



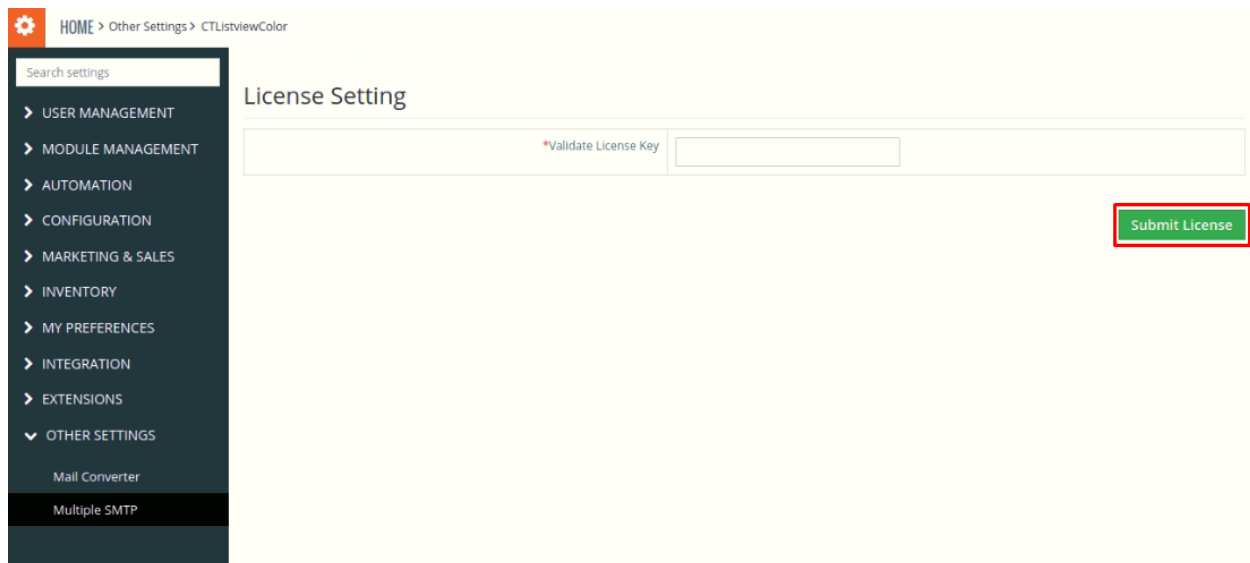
HOME > Module Management > Module Manager

<input checked="" type="checkbox"/> Quotes	<input checked="" type="checkbox"/> Purchase Orders
<input checked="" type="checkbox"/> Sales Orders	<input checked="" type="checkbox"/> Invoices
<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"/> Webmails	<input checked="" type="checkbox"/> PBX Manager
<input checked="" type="checkbox"/> Mail Manager	<input checked="" type="checkbox"/> Service Contracts
<input checked="" type="checkbox"/> Services	<input checked="" type="checkbox"/> Project Milestones
<input checked="" type="checkbox"/> Project Tasks	<input checked="" type="checkbox"/> Projects
<input checked="" type="checkbox"/> Assets	<input checked="" type="checkbox"/> Webforms
<input checked="" type="checkbox"/> SMS Notifier	<input checked="" type="checkbox"/> Google
<input checked="" type="checkbox"/> Recycle Bin	<input checked="" type="checkbox"/> CTMultipleSMTP

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

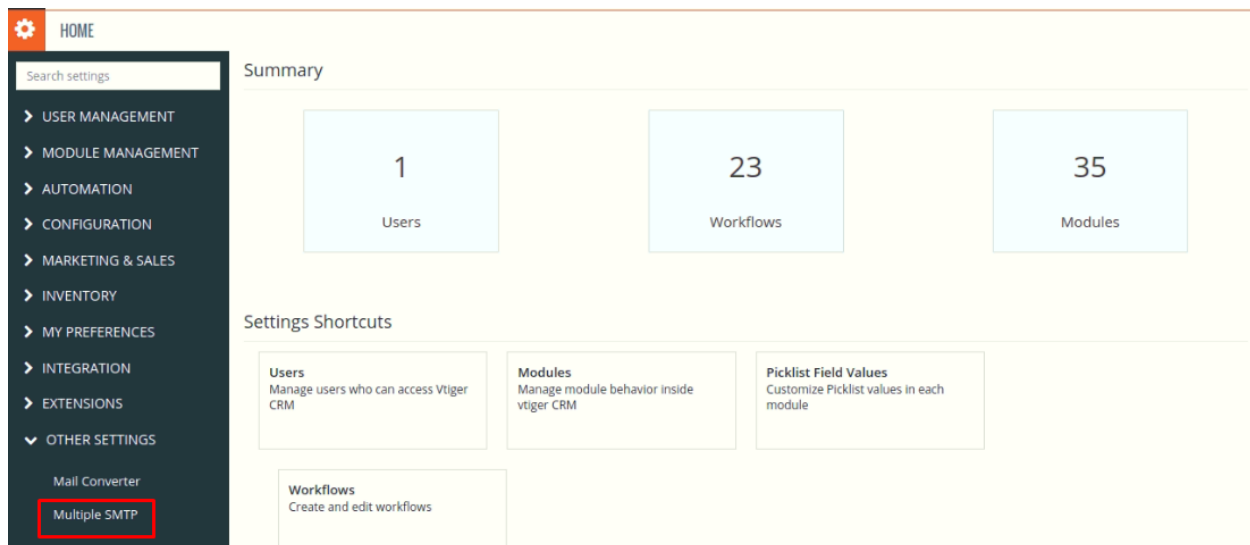


11. Click on Multiple SMTP Link → It asks you to validate License Key → enter valid License Key and click on **Submit License** Button.



Steps for Using Multiple SMTP Feature :

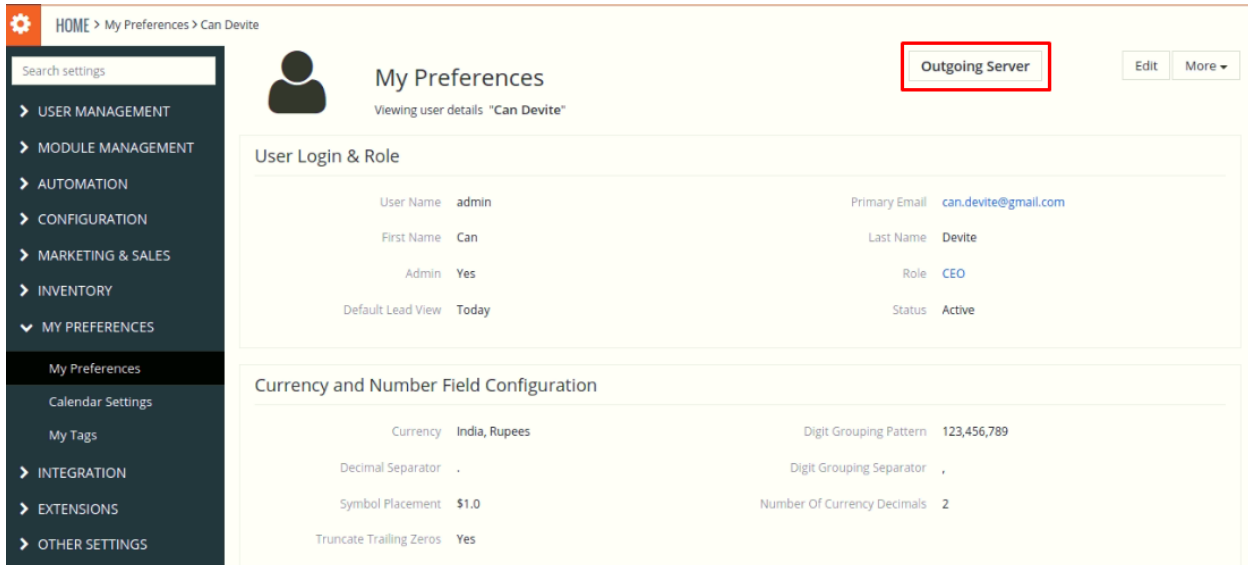
1. In the **CRMSettings** Page → Click on **OTHER SETTINGS** Menu → Click **Multiple SMTP** Link.



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



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)



HOME > My Preferences > Can Devite

My Preferences
Viewing user details "Can Devite"

Outgoing Server [Edit] [More]

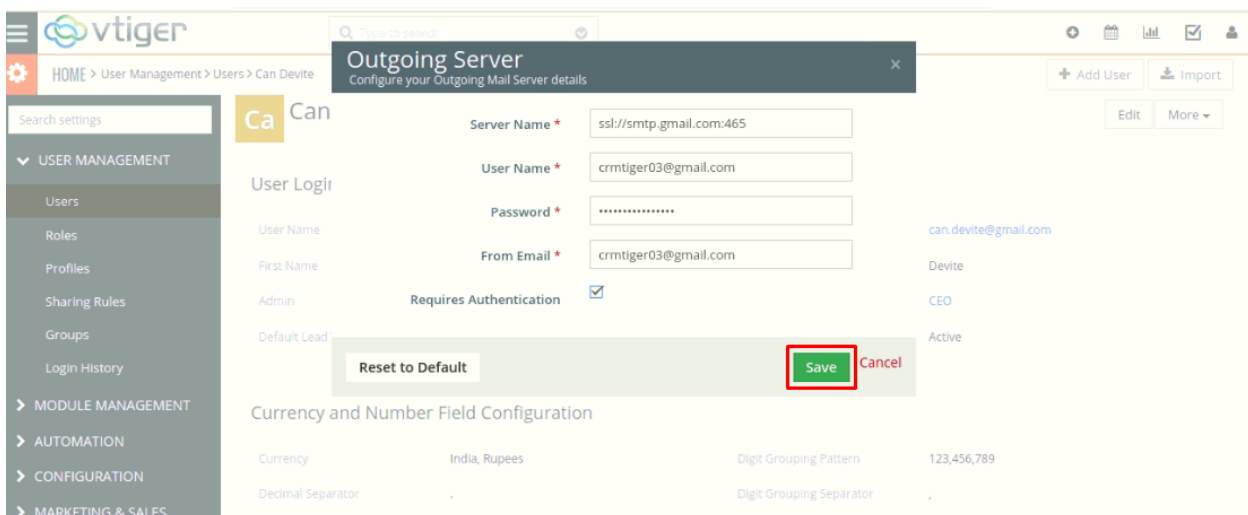
User Login & Role

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

Currency and Number Field Configuration

Currency	India, Rupees	Digit Grouping Pattern	123,456,789
Decimal Separator	.	Digit Grouping Separator	.
Symbol Placement	\$1.0	Number Of Currency Decimals	2
Truncate Trailing Zeros	Yes		

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)



vtiger

HOME > User Management > Users > Can Devite

Outgoing Server
Configure your Outgoing Mail Server details

Server Name *

User Name *

Password *

From Email *

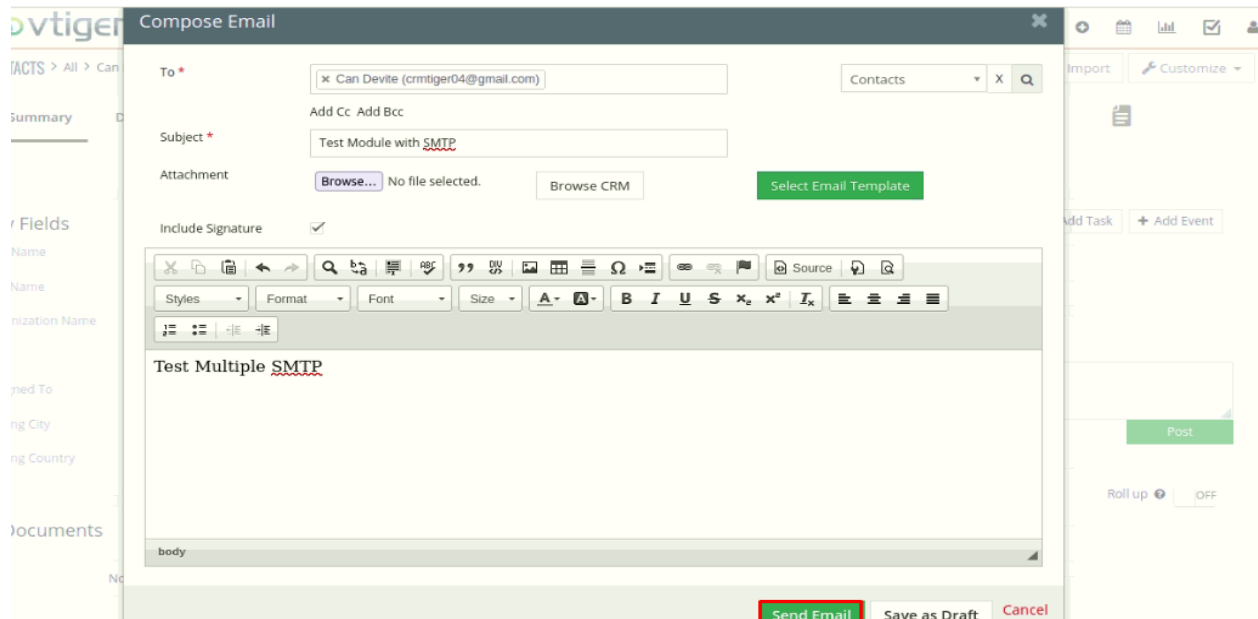
Requires Authentication ☒

Reset to Default **Save** **Cancel**

Currency and Number Field Configuration

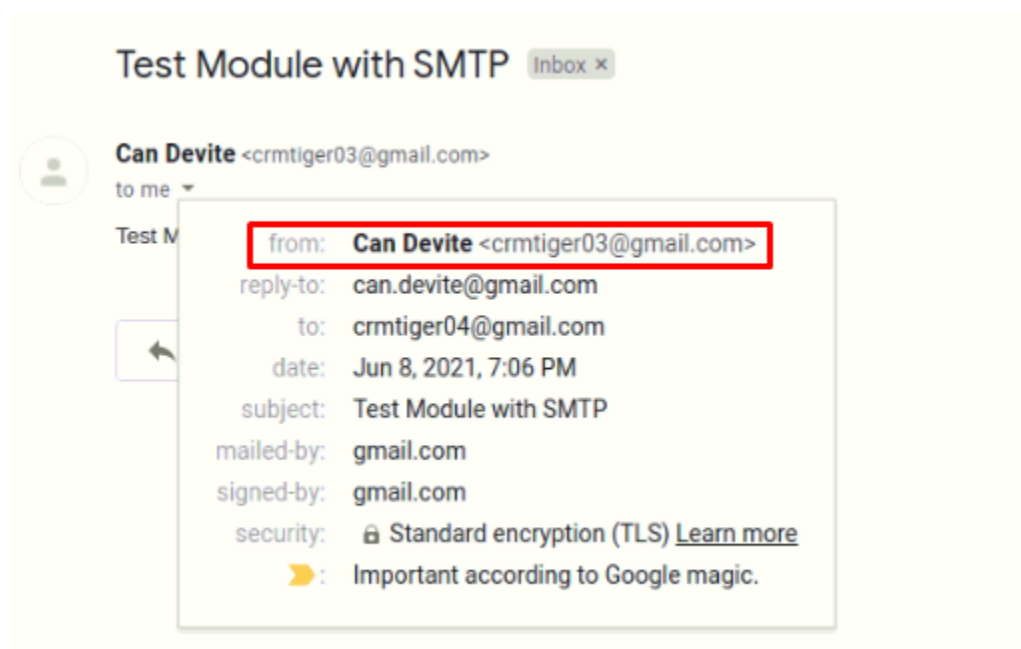
Currency	India, Rupees	Digit Grouping Pattern	123,456,789
Decimal Separator	.	Digit Grouping Separator	.

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 Email”** Action from the Listview/Detail View, It'll open the Email Popup.



The screenshot shows the 'Compose Email' interface in the CRM. The 'To' field is populated with 'Can Devite (crmtiger04@gmail.com)'. The 'Subject' field contains 'Test Module with SMTP'. The 'Attachment' section has a 'Browse...' button and a 'Browse CRM' button. A green 'Select Email Template' button is also visible. The email body is a rich text editor with a toolbar. The 'Send Email' button at the bottom is highlighted in red.

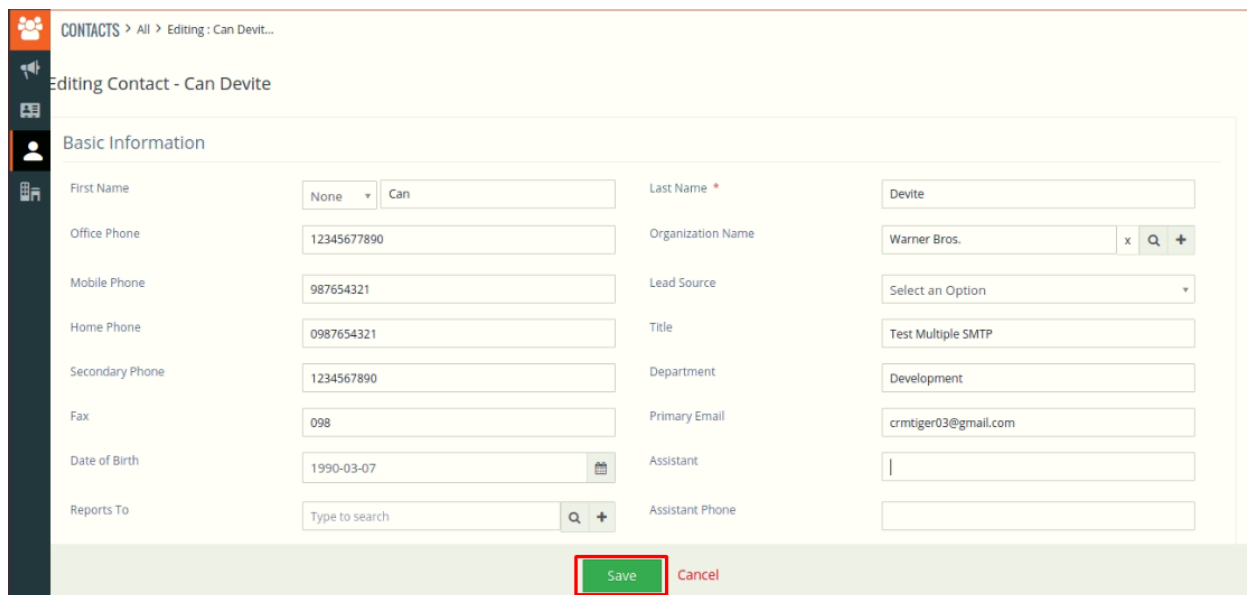
6. After filling up all the Details, Click on the Send Email Button and you will receive an email like the below screenshot.



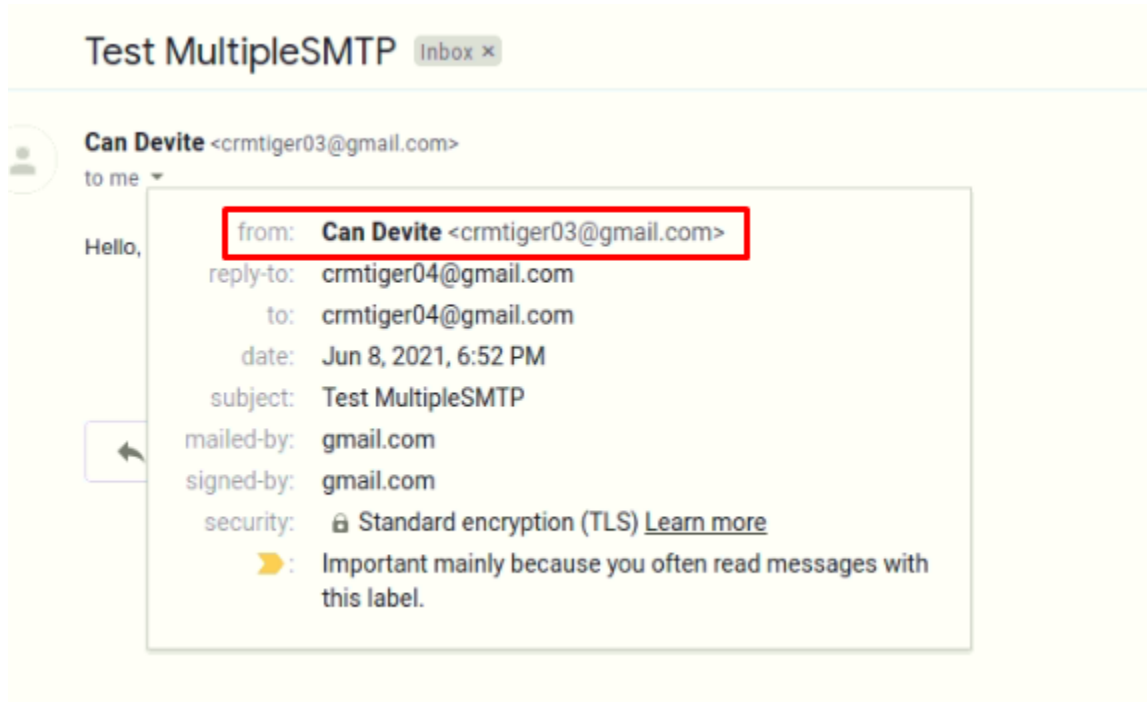
7. In the workflow, to send email using multiple SMTP servers, select action “**Send Email Using Multiple SMTP**” link (**Note:** If Multiple SMTP checkbox is not checked then send Email Using Multiple SMTP link will not be displayed)



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.