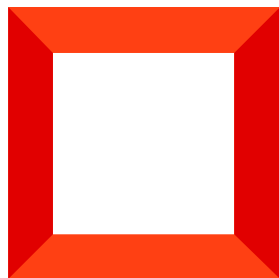
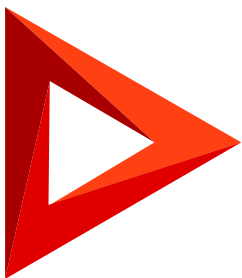


Mailbox setup

Version 7.17



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Set up a secure mailbox connection

PRODUCTS: [ALL CREATIO PRODUCTS](#)

Most email providers let third-party apps access the mailbox securely with the help of two-factor authentication and provider-generated passwords. This helps to protect your account and personal data. Email providers rarely block mailbox connection attempts so long as these measures are in place.

As such, we recommend configuring your email for secure third-party app access before connecting the account to Creatio. You need to perform this setup on your email provider's end. The exact steps vary depending on your mailbox.

There should be instructions on setting up third-party app passwords in your email provider's manual. You can find the guidelines for the most popular mailboxes below.

- [AOL](#).
- [Gmail](#).
- [Yahoo](#).
- [Zoho](#).

You will need to enter the **third-party app password** when adding your mailbox to Creatio.

Set up a personal mailbox

PRODUCTS: [ALL CREATIO PRODUCTS](#)


Each Creatio user can set up an integration with one or more mailboxes and use them to send and receive emails. Creatio uses the emails to enrich contact data and links the emails to existing objects: accounts, contacts, etc.

Set up an email account of a preconfigured provider

You need an email provider integration to add an email account. By default, Creatio is integrated with AOL, Gmail, Yahoo and other email providers. To add an account to Creatio, configure secure access for external apps. Perform the setup in your mailbox. The settings depend on the provider. Learn more in a separate article: [Set up a secure mailbox connection](#).

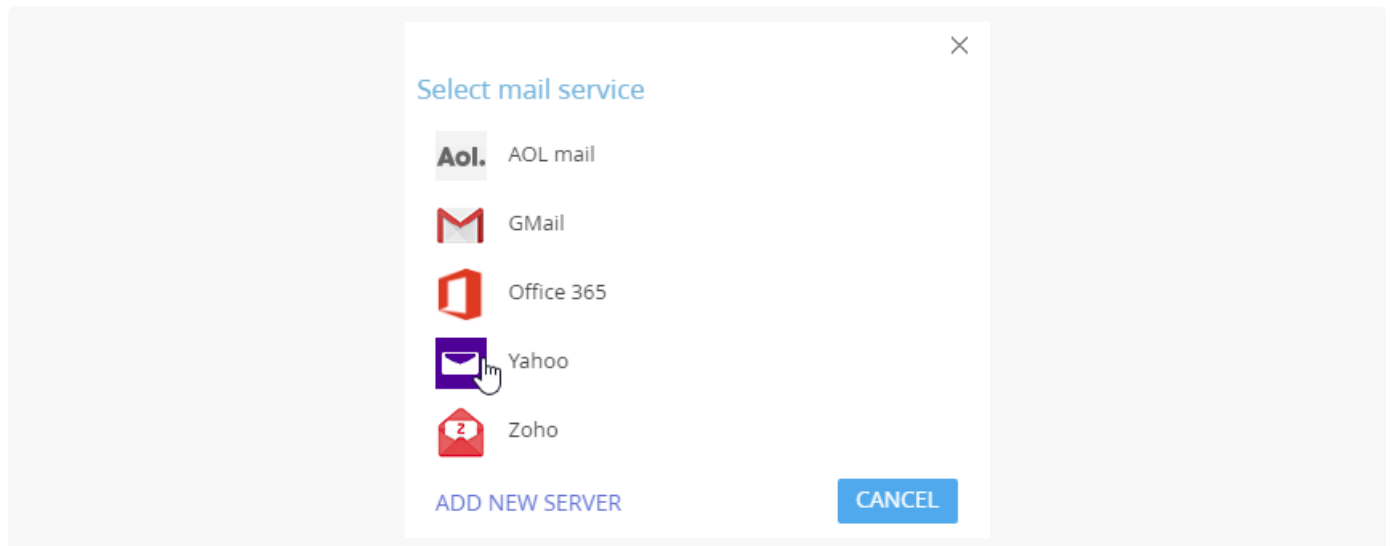
If you use a different provider, set up the synchronization by the [IMAP/SMTP](#) or [Exchange](#) protocol. The setup is performed by a system administrator.

To set up an email account of a preconfigured provider:

1. Open the [*Email*] tab on the communication panel →  → [*New email account*]. This opens the account authentication window.
2. Enter the email address and click [*Next*]. Creatio identifies the email provider according to the domain name.
3. If Creatio cannot identify the provider automatically, a window opens. Specify the provider manually in the

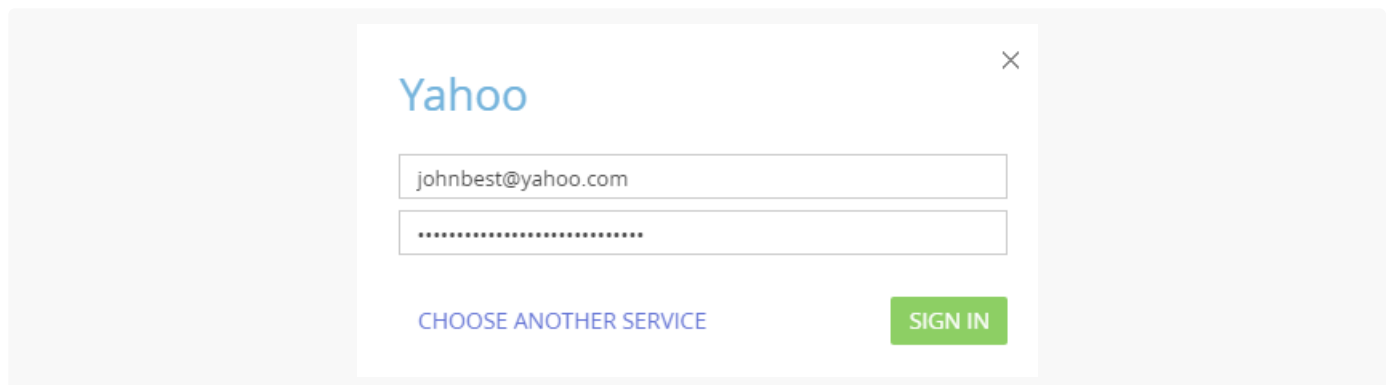
window (Fig. 1). As a result, the connection parameters of the new email provider will appear in the [*Email providers domains*] lookup. Creatio will recognize the provider by the domain name when you set up new email accounts.

Fig. 1 Select an email provider for synchronization



4. Enter the email address and click [*Next*]. Creatio will request the password to log in to your account.
5. Enter the password for external app access generated by the provider and click [*Sign in*] (Fig. 2).

Fig. 2 Sign in to an email account



As a result, Creatio will add an email account with default parameters. You will receive a notification from which you can proceed to upload emails to Creatio or perform [additional account setup](#), for example, add a signature or change the email upload period.


Set up an email account on a corporate domain

If you use a corporate email domain, set up integration with the corporate email provider by the [IMAP/SMTP](#) or [Exchange](#) protocol and match domain names to the corresponding email providers. The setup is performed by a system administrator.

Note. Gmail supports authentication without providing the login and password (OAuth connection). Before you set this up, register Creatio in Google Workspace. Learn more in a separate article: [Register Creatio](#)

[application in Google Workspace.](#)

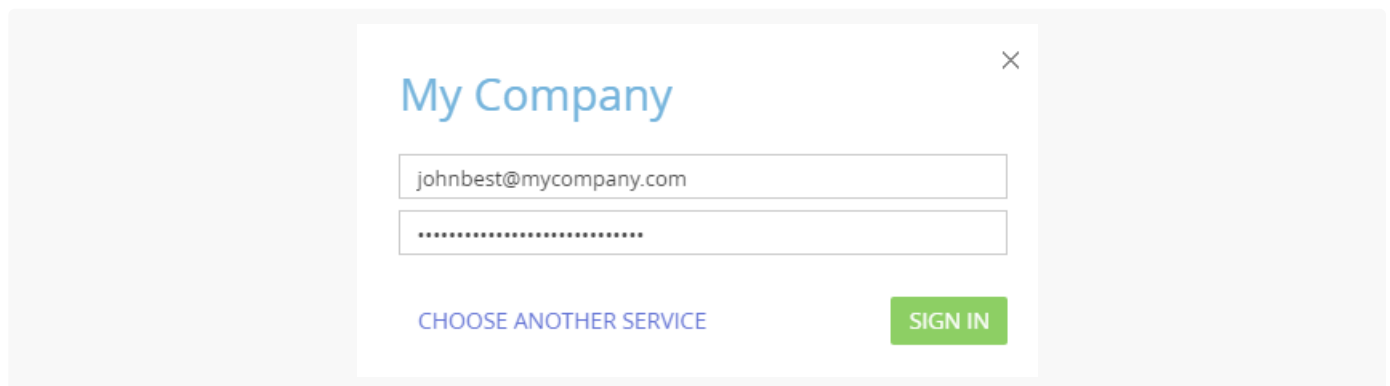
To set up an email account on a corporate domain:

1. Open the [*Email*] tab on the communication panel →  → [*New email account*]. This opens the account authentication window. This method of adding the account does not depend on the availability of configured accounts.
2. Enter the email address and click [*Next*]. Creatio identifies the email provider according to the domain name.
3. If Creatio cannot identify the provider automatically, a window opens. Specify the provider manually in the window. As a result, the connection parameters of the new email provider will appear in the [*Email providers domains*] lookup. Creatio will recognize the provider by the domain name when you set up new email accounts.

Note. A popular email provider, such as Yahoo or Gmail, can service a mailbox with a corporate domain address. If you do not know which email provider to choose, verify this with your system administrator. To log in to Gmail mailbox without providing the login and password (OAuth connection), register Creatio in Google Workspace first. Learn more in a separate article: [Register Creatio application in Google Workspace.](#)

4. Enter the mailbox password in the field that appears and click [*Sign in*] (Fig. 3).

Fig. 3 Sign in to an email account of a corporate provider



As a result, Creatio will add an email account with default parameters. You will receive a notification from which you can proceed to upload emails to Creatio or perform [additional account setup](#), for example, add a signature or change the email upload period.

Configure a shared mailbox

PRODUCTS: [ALL CREATIO PRODUCTS](#)

Shared email account enables managing shared access to the mailbox: set the access permissions to read emails for different groups of users, enable processing of incoming emails and sending emails from one address for different users or groups of users.

Shared mailboxes are commonly used:

- For case registration, sending notifications and emailing between the customers and the service team in the process of case resolution or for processing requests about company products.
- For processing information requests about company products. For example, you can create a shared sales department mailbox and grant access to the advertising department employees for sending newsletters and special offers.

Note. All incoming and outgoing emails from the shared mailbox, will only be visible in the communication panel, timeline and history to the user who registered this mailbox in Creatio and to the users which get the access permission to work with emails.

Attention. To set up a shared mailbox, you need permission to perform the [*Access to shared account setup*] and [*Shared mailbox synchronization setup*] system operations. [Managing access to system operations](#) is covered in a separate article.

Shared mailbox setup is similar to personal mailbox setup, but it also requires the following actions:

The following options can be used for managing access to the mailbox:

1. Select the [*Allow shared access*] option on the email settings page.
2. Click the + button to add employees who will use the shared mailbox. Click the 🔍 button in the displayed field and specify system user or role to grant access to a group of users. Click the [*Save*] button. If you want to grant access to the mailbox for a number of users or groups, repeat the previous step for each user or group.
3. Configure access permissions for the shared mailbox (access emails, sending emails or setting up mailbox) for the added users. For this, select the checkbox in the corresponding column ([Fig. 1](#)).

Fig. 1 Example of configuring permissions to a shared mailbox

User / Role	Access emails	Send emails	Setup mailbox
Client service department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- a. "Access email" – enables to display emails received on this mailbox in the system sections, for example, on the [*Timeline*] tab. At the same time, the emails from the shared mailbox will not be displayed in the communication panel of the user with granted access to emails. This option is used if several employees process emails from one mailbox. For example, for cases registered via email.
- b. "Send emails" – enables to select this mailbox in the [*From*] field when sending emails, setting up business processes and display incoming emails at the communication panel.

c. "Setup mailbox" – enables modification of the mailbox settings by several administrators.

4. Save the changes

Email account individual settings

PRODUCTS: ALL CREATIO PRODUCTS

Email accounts are added with default parameters. For each added email account, you can configure:

- email downloading parameters;
- email sending parameters;
- email signatures.

Note. If you have configured the synchronization with the MX Exchange mailbox, the [*Meetings and tasks*] and [*Contacts*] tabs will be displayed at the email account settings page. Here you can configure parameters of synchronization of MS Exchange calendar and contacts. [Read more >>>](#)


You can go to the mailbox settings directly from the mailbox registration notification or by selecting the account in the [*Edit email accounts*] menu of the  button.

Fig. 1 Edit page of the email account settings

john.best.business@gmail.com settings What can I do for you? >

CLOSE CHANGE EMAIL SETTINGS

< EMAIL >

Download emails to Creatio

Select emails to download. Downloaded emails would be saved to Creatio and linked to customer records

Sync existing emails for the following period 1 week ▼

- Automatically download new emails
- Download all emails from mailbox
- Download emails from customized folders

Send emails from Creatio

Setup singnature and default mailbox for sending emails from Creatio

Message language ▼

- Set custom display name
- Use "john.best.business@gmail.com" as default mailbox when sending emails
- Add signatures to outbound emails

Allow shared access

Allow other users to send emails using this mailbox or access emails downloaded from this mailbox

Which access rights to add? +

User / Role	Access emails	Send emails	Setup mailbox
No data			

Receive emails in Creatio

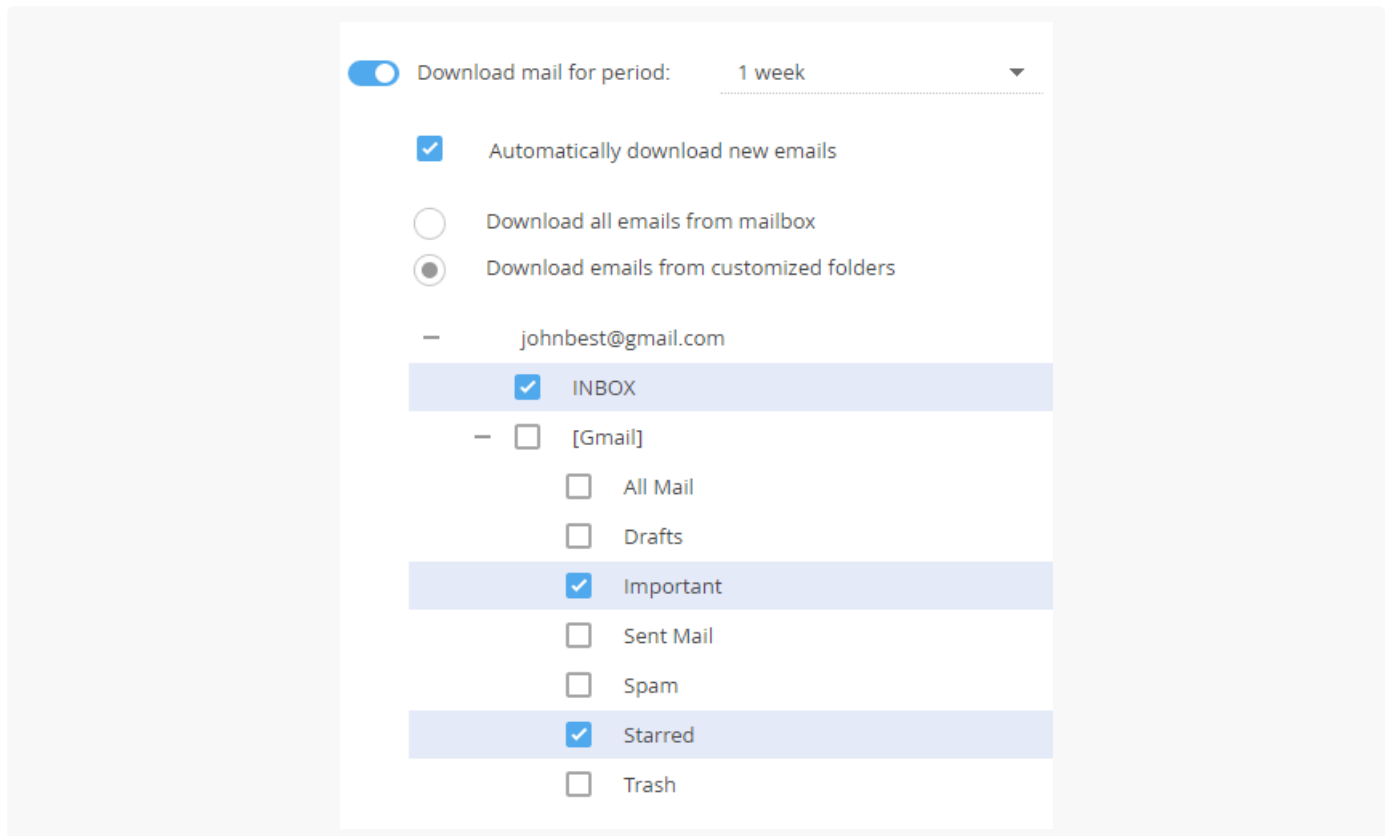
1. To receive emails from the mailbox, toggle on the [*Download mail for period*] switch and specify the time interval (for example, day, week, month) for which emails will be downloaded to the system at the first synchronization.

You can change how often Creatio will synchronize the mailbox in the “Mailbox synchronization interval” (“MailboxSyncInterval” code) [system setting](#).

2. Select the [*Automatically download new emails*] checkbox to download incoming emails automatically.
3. Select the [*Download all emails from mailbox*] option to download all messages from the mailbox or the [*Download emails from customized folders*] option to download messages from specific folders only.

- To download emails from specific folders only, select the [*Download emails from customized folders option*], click the [+] button to display the folders of the specified account and select folders from which you need to receive emails (Fig. 2).

Fig. 2 Specifying synchronization folders



- Save the changes.

Note. If you only select a parent folder for downloading emails, the messages from the nested folders will not be downloaded to Creatio. Select the nested folders to download emails from them.

Send emails from Creatio

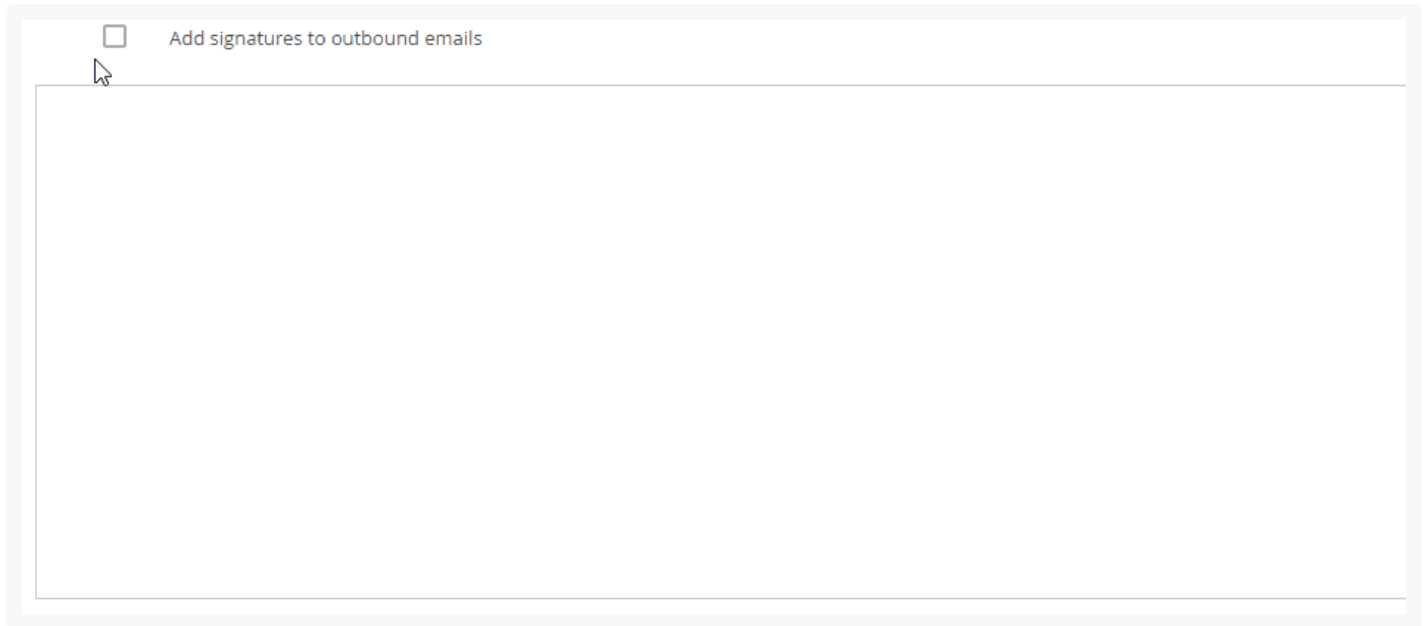
To reply to emails directly from Creatio, set up email sending parameters. To do this:

- Toggle on the [*Send emails using this mailbox*] switch to use the mailbox for sending the emails. If the switch is disabled, the mailbox will not be available for selection on the email edit page, as well as in the corresponding business process and case elements.
- Select the [*Set "email address" as default sender address*] checkbox to use the mailbox by default. The mailbox address will be specified by default in the [*From*] field for new emails.
- Save the changes.

Configure an email signature

To add a signature to outgoing emails, select the [*Add signatures to outbound emails*] checkbox and add the signature text in the input area below ([Fig. 3](#)). Save the changes.

Fig. 3 Adding signatures to outgoing emails

The image shows a user interface element for adding signatures. At the top left, there is a small square checkbox followed by the text "Add signatures to outbound emails". Below this, there is a large, empty rectangular text input area with a thin border. A mouse cursor is positioned at the top left corner of this text area.

Note. You can copy a signature from your mail client and paste it to the text area. In some browsers, only one image can be copied to the signature template at a time from the clipboard. If your signature contains several images, the remaining images must be added one by one.