

IMAP / SMTP email

Add IMAP/SMTP email provider

Version 8.0



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Add IMAP/SMTP email provider

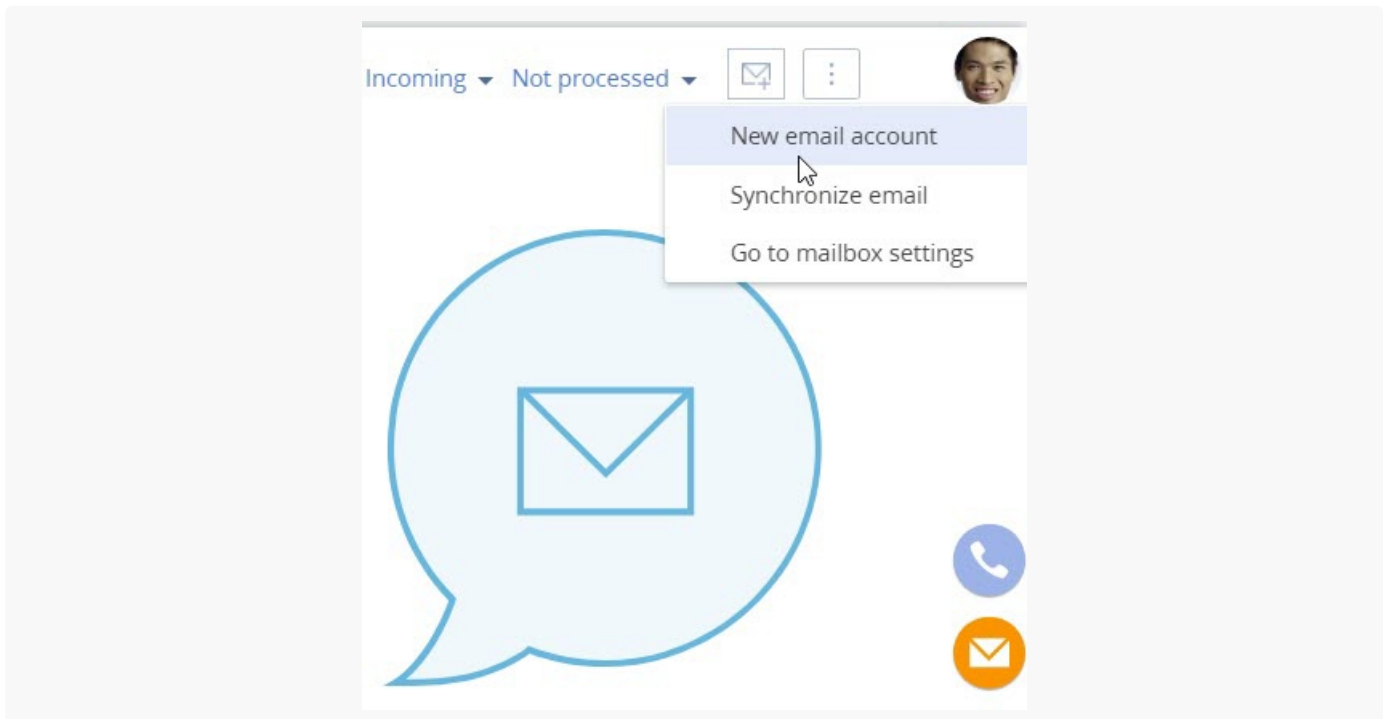
PRODUCTS: ALL CREATIO PRODUCTS


You can add an IMAP/SMTP email service provider using several methods.

Method 1. Add the IMAP/SMTP provider from the [Email] tab of the communication panel

1. In the communication panel, click  to open the [*Email*] tab.
2. Click  and select the [*New email account*] action (Fig. 1).

Fig. 1 Adding a new email account



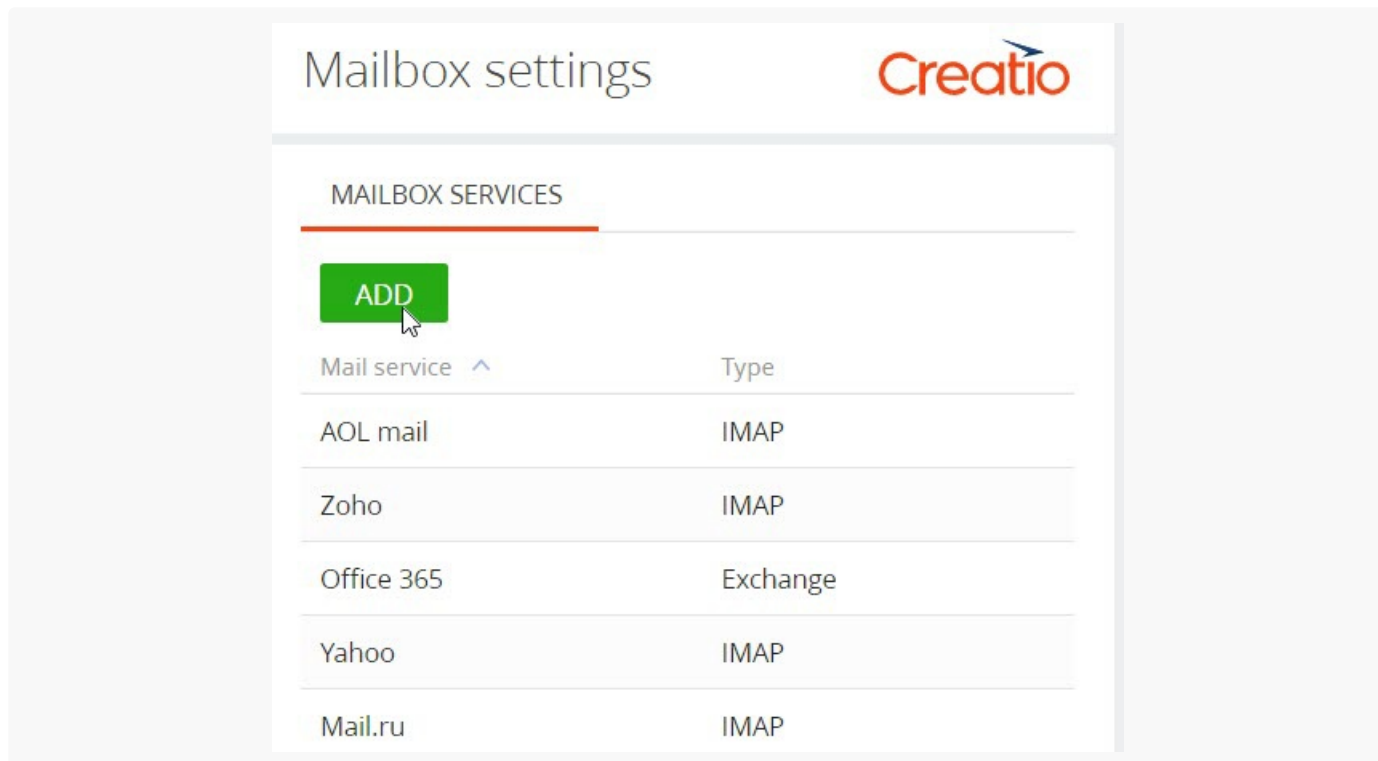
Note. You can also add a new email account by selecting [*Go to mailbox settings actions*] under  and clicking [*New*] on the page that opens.

3. Enter the email address in the displayed [*New email account*] window, and click [*Next*].
4. Click the **Add New Server** button.

Note. Add the domains of a new provider to the [*Email providers domains*] lookup to have Creatio automatically identify this email provider in the future. As a result, users will not have to specify the mail provider manually when setting up an email account.

5. On the opened page, click [Add] (Fig. 2).

Fig. 2 Adding a new email provider



6. On the page that opens, select "IMAP" in the [Service type] field.
7. Enter two required parameters: the "Inbound mail server (IMAP)" in the "imap@domain.com" format and the "Outgoing mail server (SMTP)" in the smtp@domain.com format (Fig. 3).

Fig. 3 Setting up the IMAP/SMTP email service provider

Add service

APPLY CANCEL

Service settings

Service type
IMAP

Inbound mail server (IMAP)
Email service settings for receiving emails. Specify mail server address, port and security settings

Server address *
imap@domain.com

Port
993

Security
SSL/TLS

Outgoing mail server (SMTP)
Email service settings for sending emails. Specify mail server address, port and security settings

Server address *
smtp@domain.com

Port
465

Security
SSL/TLS

Additional settings

8. The rest of the IMAP/SMTP server settings will be populated automatically. You can change them by selecting the needed option from the drop-down list to configure the mail server port and the security parameters.

Set the inbound mail server port:

- Select “**143**” to use the port without encryption.
- Select “**993**” to use the port for a secure connection.

Set the security parameters of the inbound mail server:

- Select “**SSL/TLS**” to use the standard data security protocol.
- Select “**STARTTLS**” to use the common protocol extension.

- c. Select “**None**” to disable the inbound mail data security.

Set the outgoing mail server port:

- a. Select “**587**” to use the port without encryption.
- b. Select “**455**” to use the port for a secure connection.

Set the security parameters of the outgoing mail server:

- a. Select “**SSL/TLS**” to use the standard data security protocol.
- b. Select “**None**” to disable the outgoing mail data security.

- 9. Specify additional settings.

Set up the mailbox login format:

- a. Select the [*Use manual entry*] option if users enter their email address and username.
- b. Select the [*Use email address*] option if the full email address is used as a login (for instance, “example@google.com”).
- c. Select the [*Use mailbox name*] option if the part of the email address before “@” is used as a username. For example, the “test” will be a login for “test@google.com” email address.

Set up the authentication method:

- a. Select “Basic” for the basic authentication using the user name and password with Base64 encryption.
- b. Select “OAuth 2.0” to restrict the service access to protected user resources without the need to pass the login and password. Populate the [*Application (client) ID*] and [*Client secret*] required fields. [*Application (client) ID*] is generated by the authentication server of the mail service. The documentation and API may refer to the application ID as “Product ID.” [*Client secret*] - a secret key generated by the authentication server. The documentation and API may refer to the client secret as “Product key.”

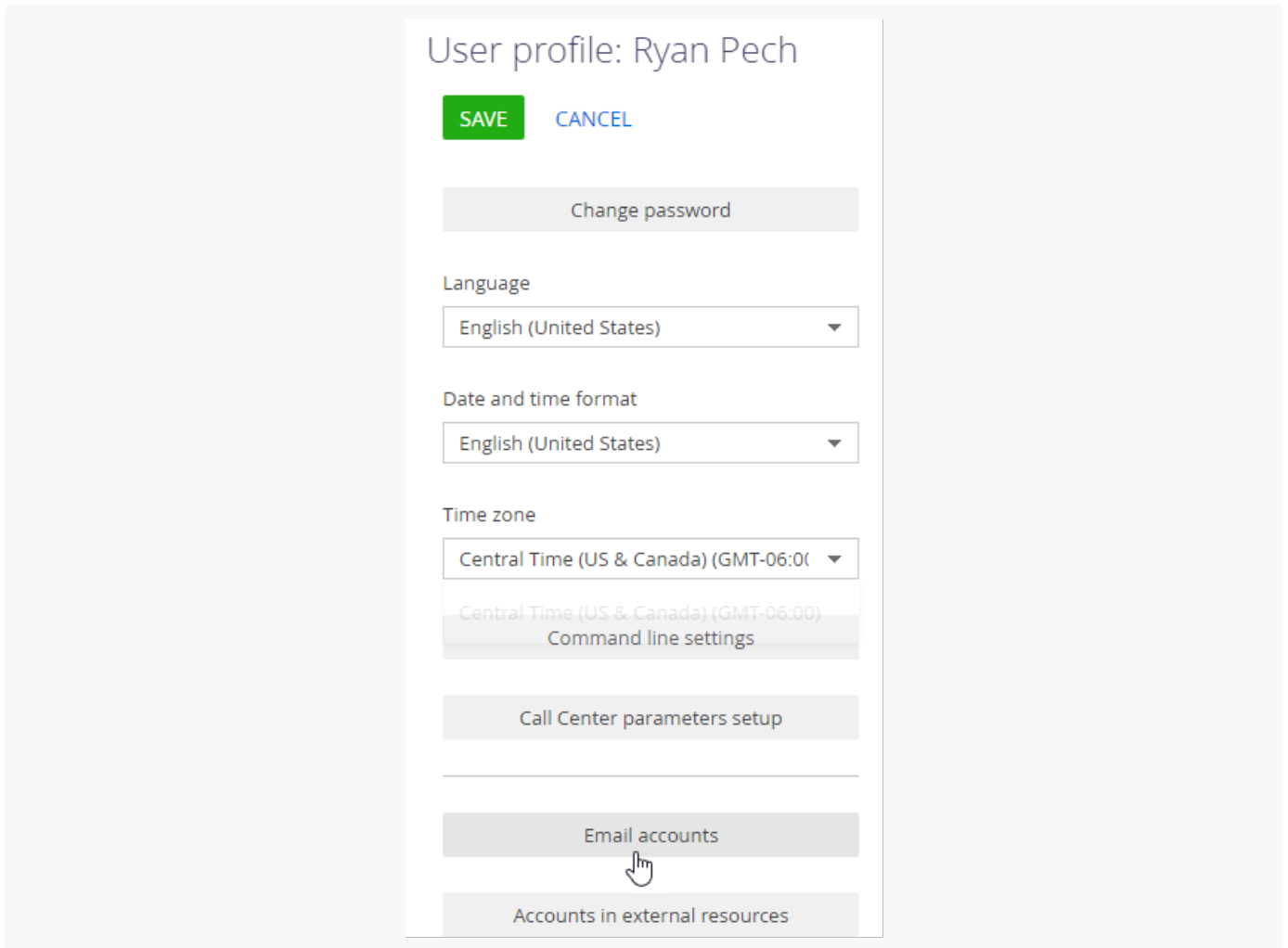
- 10. Save the settings by clicking [*Apply*].

As a result, system users will be able to use the mailboxes of this provider to send and receive email messages.

Method 2. Add the IMAP/SMTP provider from the user profile

1. Open the user profile page by clicking the [*Profile*] image button on the main page of the application.
2. Click [*Email accounts*] (Fig. 1).

Fig. 1 Opening the email accounts



3. Click [*New*] in the opened window.
4. To complete the setup, **perform steps 3-10**, described above in **Method 1**.

Note. To delete a mail server, delete all its mailboxes (email accounts) first.