

SMTP Services

Introduction

This guide offers step-by-step instructions for configuring Puzzel Case Management to send emails using your own SMTP servers. Leveraging this feature empowers you with enhanced control and customisation over outbound communications.

Prerequisites

- An active Puzzel Case Management account.
- Access to the 'Settings' menu.
- SMTP server details (username, password, server address, port).

Configuration Steps

General Configuration for SMTP

1. **Enable Outbound Integrations:** Confirm that 'Outbound Integrations' is active in your account by navigating to: **Settings > Integrations > Outbound Integrations**. If you cannot see the 'Outbound Integrations' menu, please submit a support ticket to have it enabled.
2. **Access SMTP Settings:** Go to the SMTP configuration page via **Settings > Integrations > Outbound Integrations > SMTP Page**.
3. **Add SMTP Service:** Click on 'Add SMTP Service' to initiate the setup process.
4. **SMTP Service Details:** Input the required details:
 - **Account Description:** Assign a recognisable name to your SMTP service.
 - **Username:** Your SMTP account username.
 - **Password:** Your SMTP account password.
 - **Outgoing Server Address:** The URL or IP address of your SMTP server.
 - **Port:** The port used by your SMTP server.
 - **SSL:** Choose 'Yes' for SSL encryption or 'No' if not required.
5. **Adding Multiple SMTP Servers:** If necessary, repeat the setup process to add more SMTP servers.
6. **Configure Email Channels:** Apply your new SMTP settings to your email channels by navigating to **Settings > Ticket Channels > Email** and editing the desired channel.
7. **Select SMTP Service for Email Channel:** In the channel settings, select your SMTP service from the drop-down list.

Specific Configuration for Microsoft 365 Users

For customers using Microsoft 365, follow these additional detailed instructions to ensure your mailbox is configured correctly for sending emails via SMTP:

Microsoft 365 Admin Center Configuration

1. **Navigate to the Microsoft 365 Admin Center:** Go to **Users > Active users**.
2. **User Mail Settings:** Select the user, then click on **Mail** in the flyout. Under **Email apps**, click **Manage email apps**.
3. **Enable Authenticated SMTP:** Ensure the **Authenticated SMTP** setting is checked (enabled), then save your changes.

Puzzel Case Management SMTP Configuration

1. **SMTP Settings in PCM:** Navigate to **Settings > Integrations > Outbound Integrations > SMTP Page** and enter the SMTP details:
 - **Username:** Your Exchange Online email address.
 - **Password:** Your Microsoft Password.
 - **Outgoing Server:** smtp.office365.com
 - **Port:** 587
 - **SSL:** Yes
2. **Configure Ticket Channels for Email:** Under **Settings > Ticket Channels > Email**, edit the email channel to route outbound email through the custom SMTP server. Select the appropriate SMTP service description and ensure your Exchange Online email address is correctly entered.

By following these comprehensive steps, you can configure Puzzel Case Management to send emails using either a general SMTP server or specifically through Microsoft 365, enhancing your ability to manage outbound communications effectively.