DOCUPHASE

This document provides basic information about configuring SMTP/Server Side Emailing for the following services:

- **Exchange (On-Premise)**

- **Exchange (Hosted/O365)**
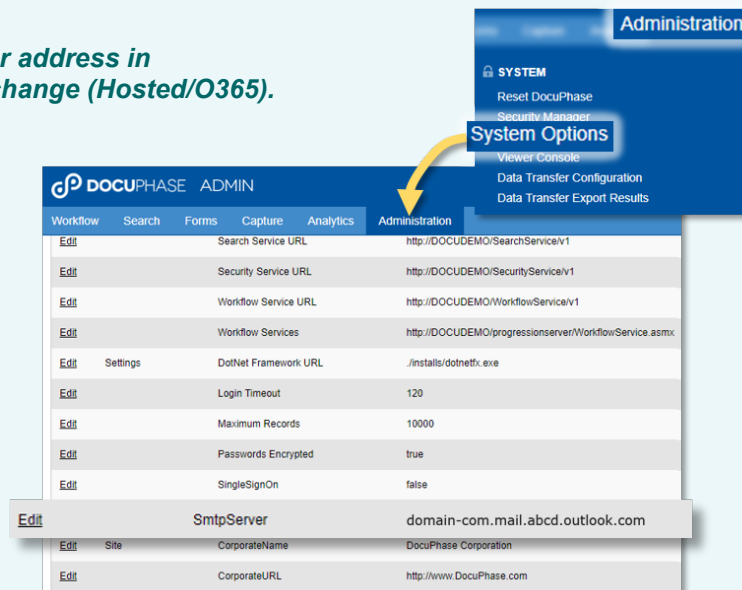
- **Google**

Exchange (On-Premise)

On-Premise Exchange requires anonymous relay to be enabled, and must be actively online for the application server to communicate and transmit emails.

Exchange (Hosted/O365)

Like Hosted Exchange requires a formal connector to build to the DocuPhase application server. Please refer to the following article for details: https://docs.microsoft.com/en-us/exchange/mail-flow-best-practices/use-connectors-to-configure-mail-flow/set-up-connectors-to-route-mail

NOTE
Be sure to enter the SMTP server address in DocuPhase when setting up Exchange (Hosted/O365).

Google

Google Service - Admin Configurations

1) Go to: Google Admin ▶Security▶Basic Settings and enable the following option:

   ✓ *Enable the Allow less secure apps: Allow users to manage their access to less secure apps option.*

2) Navigate to: Apps > G Suite > Settings for Gmail > Advanced settings and make the following option settings:

   ✓ *Allow per-user outbound gateways: Allow users to send mail through an external SMTP server when configuring a "from" address hosted outside your email domains.*
   ✓ *Email whitelist: Add public of AWS app server (i.e., 22.333.444.555)*
   ✓ *Comprehensive mail storage: Ensure that a copy of all sent and received mail is stored in associated users' mailboxes*
   ✓ *Enable SMTP relay:*

Google Service - Server Side Configurations

A) Add IIS6 Console and SMTP role/features on hosted server, as shown below:

> 💡 **TIP**
>
> **Review the following video:**
> **https://www.youtube.com/watch?v=9Q4S_6pmPoA**

Google Service (continued)

B) **Configure SMTP Virtual Server.**

Under the Access tab:

1) Click **Relay** to display the **Relay Restrictions** dialog.

2) Enable the settings as shown here (right), then click OK .
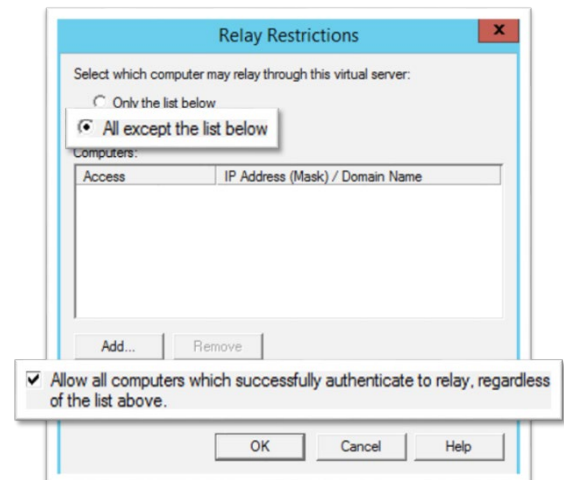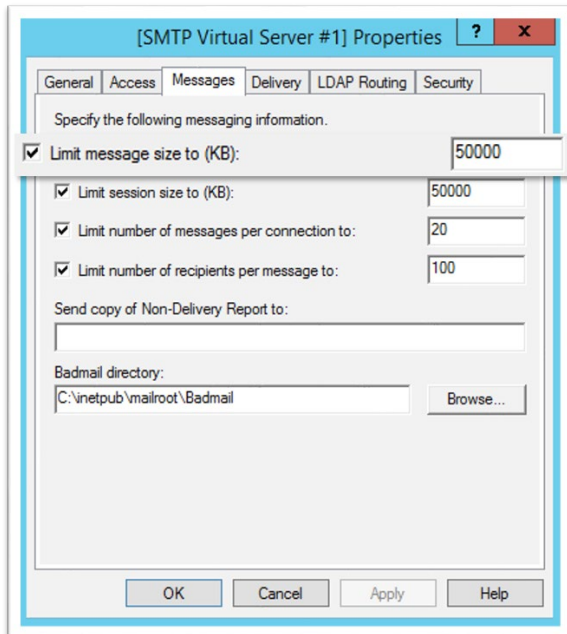
Under the Messages tab:

3) Increase email size limits to 50MB, then click Apply .

Under the Delivery tab:

4) Click on **Outbound Security** to display the corresponding dialog.

On the Outbound Security dialog:

5) Enable the Basic authentication option.

6) Enter your G-Suite e email address and password, then click OK .

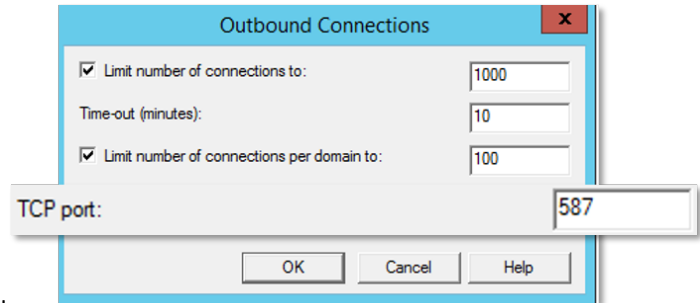7) Click on **Outbound Connections** to display the corresponding dialog.

Google Service (continued)

On the Outbound Connections dialog:

8) Enter the **TCP** port value as **587**, then click OK .

9) Click on **Advanced** to display the corresponding dialog.

On the Advanced Delivery dialog:

10) Enter the local machine name as the Fully-qualified domain name.

> ⓘ **IMPORTANT!**
>
> **The information entered as the Fully Qualified Domain Name depends on whether or not SSL is enabled:**
>
> - **If SSL _enabled_, then use the Fully qualified Domain Name of the Web Server (generally the URL minus the protocol and DocuPhase subpage).***
>
> - **If SSL is _NOT_ enabled, then use the actual local Machine Name of the web server.**
>
> *The example shown here, applies to systems with SSL enabled*
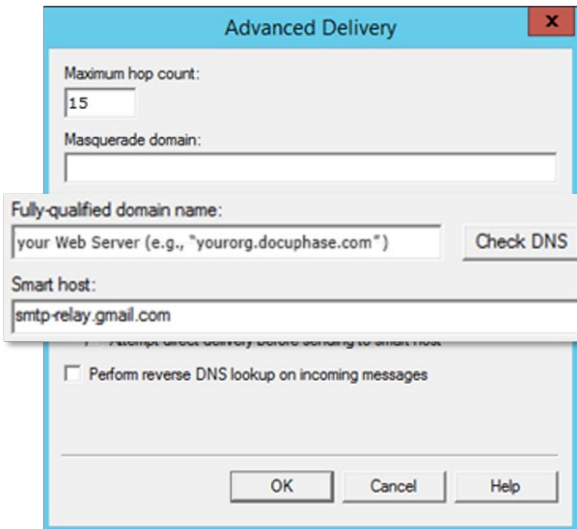
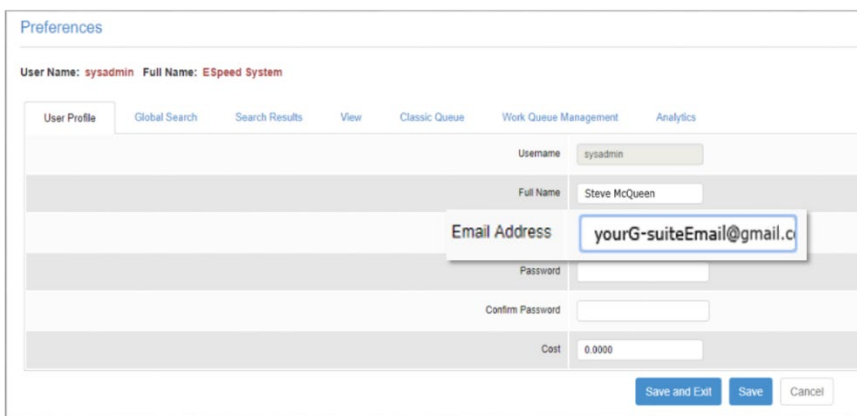11) Enter the SMTP Relay Address as the Smart host, then click OK .

On the local drive:

12) Go to SSMS► DocuPhase► Config Table.

In the Config Table (see step 12 above):

13) Enter the SmtpServer address as the machine name as (see step 10 above).

On the User Profile tab on the User Preferences (⚙) screen in Docuphase:

14) Change the email address of sender (e.g., sysadmin) to the appropriate G-Suite email address (see step 6 above).