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Simple Mail Transfer Protocol SMTP Setup

Cavallo Support - 2026-02-16 - [Setup](#)

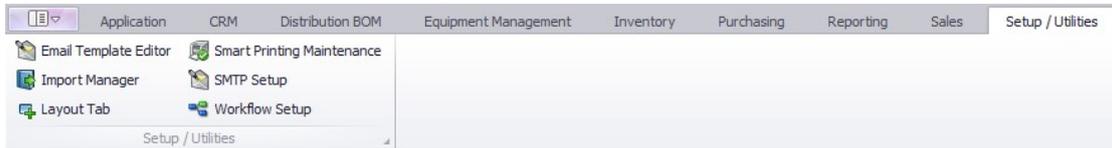
Overview

The Simple Mail Transfer Protocol (SMTP) Setup form allows users to setup multiple SMTP addresses. Different SMTP configurations can be maintained to be automatically used for specific users or conditionally based on business objects. SMTP rules setup here will take precedent over the Sales Email Confirmation settings in Settings (the configuration there is essentially treated as a backup if a valid SMTP Setup rule is not matched).

This document also discusses how to enable security for the SMTP Setup form and provides an example of how SMTP addresses can be used to help automate effective business communications.

Setup

The SMTP Setup module is available under the "Setup / Utilities" tab at the top of the window.



To add a new SMTP address, click the "Add" button. To remove or edit an entry that already exists, simply select a row and click the corresponding "Remove" or "Edit" buttons. Below is an example of how the SMTP form would look with two entries.



When the "Add" button is clicked, a separate window will pop up (see below). Enter the desired SMTP information for the new entry into this form and then click the "OK" button to save. By entering a "Business Object" type, "Column Name," and "Column Value," SalesPad will automatically use the setup SMTP address whenever any document of this type is emailed from SalesPad. Alternatively, the "Business Object" field can be set to "SystemUser" and the "Column Value" field set to the desired "User ID." All emails sent from the designated SalesPad user will then use the setup SMTP configuration.

- **For OAuth configuration**, select your OAuth Service Provider and then click Sign In (See also: [OAuth for Microsoft Outlook 365 and Google Gmail](#))

The SMTP Setup dialog box contains the following fields and controls:

- Sign In | Sign Out (with user icons)
- Email Server ID: 0
- OAuth Service Provider: None (dropdown)
- Email Server Hostname or IP Address: (empty text box)
- SMTP User: (empty text box)
- SMTP Password: (empty text box)
- SMTP Port: 0
- Business Object: (empty dropdown)
- Column Name: (empty dropdown)
- Column Value: (empty text box)
- Enable SMTP over SSL or TLS
- SSL/TLS Startup Method: (empty dropdown)
- OK | Cancel buttons

User

Assume that we have an entry in the SMTP form like the one below. This setup will cause every email sent for a "Sales Document" with a "Sales Doc ID" of "STDORD" coming from SalesPad to use this SMTP information.

Email Serv...	Email Server Hostname or IP...	SMTP User	SMTP Port	Enable SMTP over SSL ...	Business Ob...	Column N...	Column Va...
1	smtp.gmail.com	jacobp@salespad.net	587	<input checked="" type="checkbox"/>	SystemUser	User_Name	jacobp

1. Click the "SalesDocuments" button from the "Application" tab to open the Sales Documents search form.

The search form interface shows a list of forms on the left and a table of search results on the right.

Seq	Form Name	Form Type	Form Value	Selected Tabs
0	SalesDocumentEntry	Sales_Doc_ID	SERVICE	▼

2. After searching documents, they can be sorted to find all the "STDORD" documents by entering "STDORD" in the "SalesDoc ID" column header.

The search results table shows the following data:

Source	Doc Date	Sales Doc Type	Sales Doc Num	Customer PO Num	Sales Doc ID
					STDORD

3. Open any "STDORD" document and click the "Print" button. This will launch a new window.

Sales Documents (ORDER) ORDST2252

Close Save Print Delete Copy Allocate Un Allocate Dynamics GP

Document Properties

Document #: ORDST2252 ORDER (STDORD)

Customer #: ADAMPARK0001 Adam Park Resort

Cust PO: Sales Rep: GREG E.

Req Ship: 4/10/2014 Sales Terr: TERRITORY 2

Ship Method: GROUND Pay Terms: NET 30

Whse: WAREHOUSE Doc Date: 4/10/2014

Currency: Z-US\$ Created By: charles.rumley

Line Items Notes Addresses Holds User Fields Audit Related Documents Purchases Quick Report FedEx Quote Email Audit Assemblies

Item	Item Number	Item Class Code	Price Level	Req Ship
HD-20	HD-20	RM-ACT	RETAIL	4/10/2014

4. Select the type of document you wish to attach to the email and click the "Email..." button.

Printing Sales Document Report

Print Options

Select All

Select None

Collate

Close after Print

Print as Single Job

Email as Single Job

Prevent Changes

Properties...

Mark Default Reports

Print Attachments

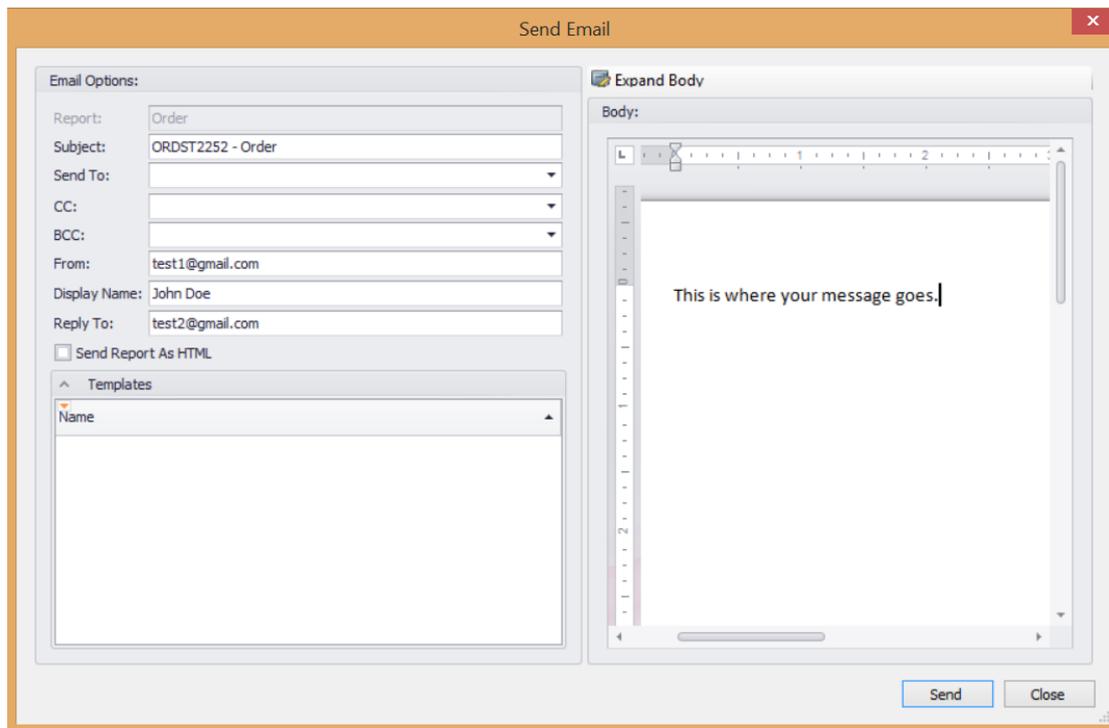
Print None

Available Reports

ReportName	Printer	Copies
<input type="checkbox"/> Copy of Order		
<input type="checkbox"/> Customer RGA		
<input type="checkbox"/> Detailed Packing Slip		
<input type="checkbox"/> Excel Sales Document		
<input type="checkbox"/> Internal RGA		
<input type="checkbox"/> Invoice		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Order Confirmation		
<input type="checkbox"/> Packing Slip		
<input type="checkbox"/> Picking Ticket		
<input type="checkbox"/> Quote		
<input type="checkbox"/> Return		
<input type="checkbox"/> Sales/Word Document		
<input type="checkbox"/> Summary Packing Slip		

Fax... Email... Preview... Print To... Quick Print Close

The "Email..." button will launch the "Send Email" window. Since the SMTP information entered for all "STDORD" documents will be used, the "From:" field will not be used. Instead, the email will be from whatever the "SMTP User" email entered on the "SMTP Setup" form is. However, the "Display Name:" and "Reply To:" fields will display whatever information is entered here. This system will work similarly for "Smart Printing" emails, "Sales Document Mass Update" emails, and "Purchase Order Generation" emails.



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Security

SMTP Setup - Allows users to open the SMTP Setup Module.