Multiple SMTP accounts for different functionalities

726 TDO KB October 11, 2023 Setup, Site Configuration 26.83K

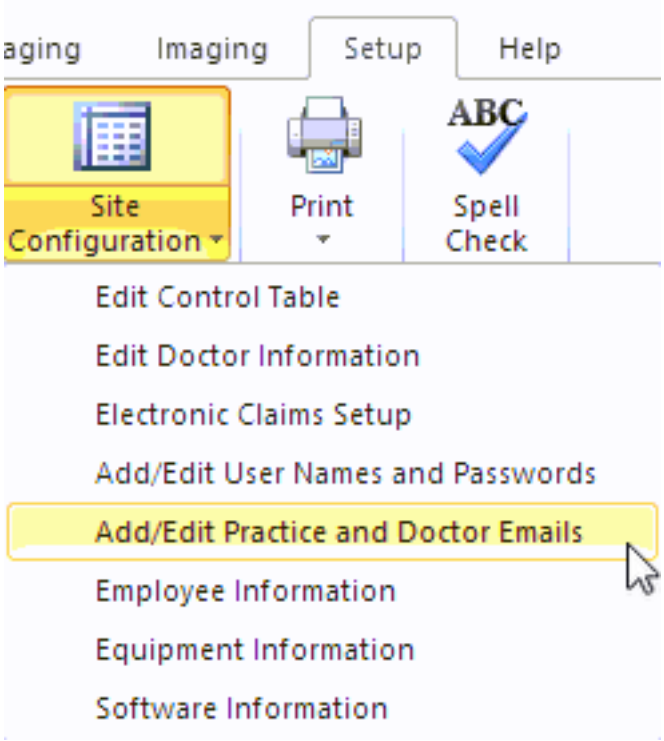
Overview

This feature allows an office using TDO to configure two or more email accounts to send emails from TDO.

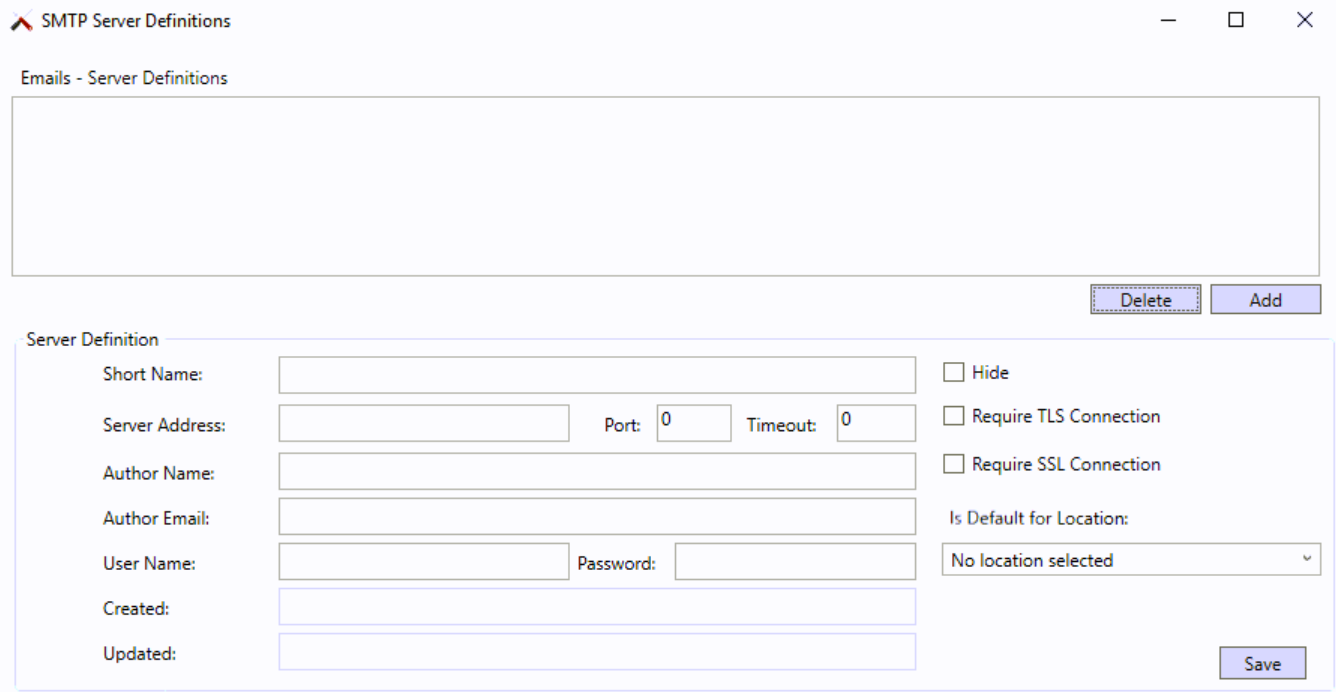
Note: This feature is available in TDO 12.290 or newer. To view instructions for configuring SMTP server settings in earlier versions of TDO, please view this article.

Detailed Steps

1. Open the menu **Setup>Site Configuration>Add/Edit Practice and Doctor Emails**



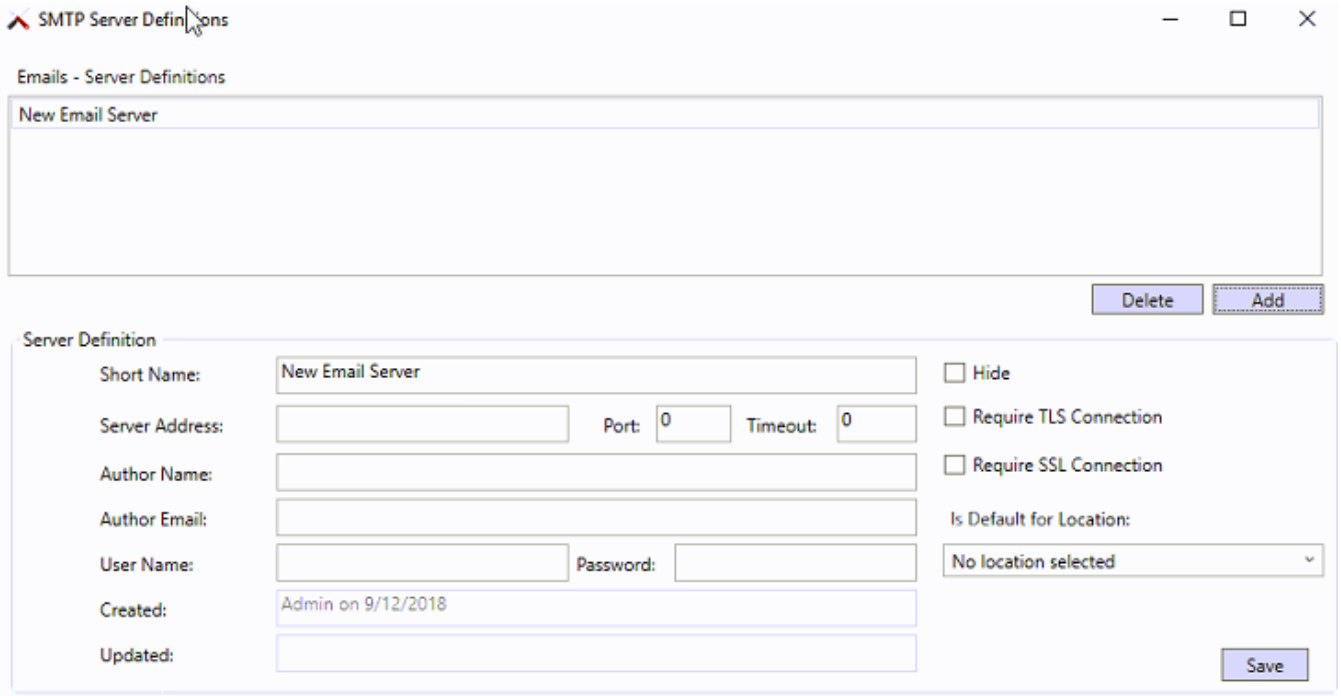
2. The **Emails – Server Definitions** window will open. **Note: the SMTP settings from Edit Control Table will be moved to this window after updating TDO to 12.290 or higher.**



3. Click on **Add** to start adding SMTP accounts.

Warning:

Ensure that you have **Added** a new record before you begin editing any information. Otherwise, you will overwrite information for one of the existing SMTP configurations.



4. Enter the new email server on **Short Name** field. *For Instance: the practice name*

5. Enter the SMTP server on **Server Address** field. *For Instance: stmp.gmail.com for those users with Google email accounts.*

6. Enter the Port number on **Port** field.

7. Enter the time in seconds on **Timeout** field.

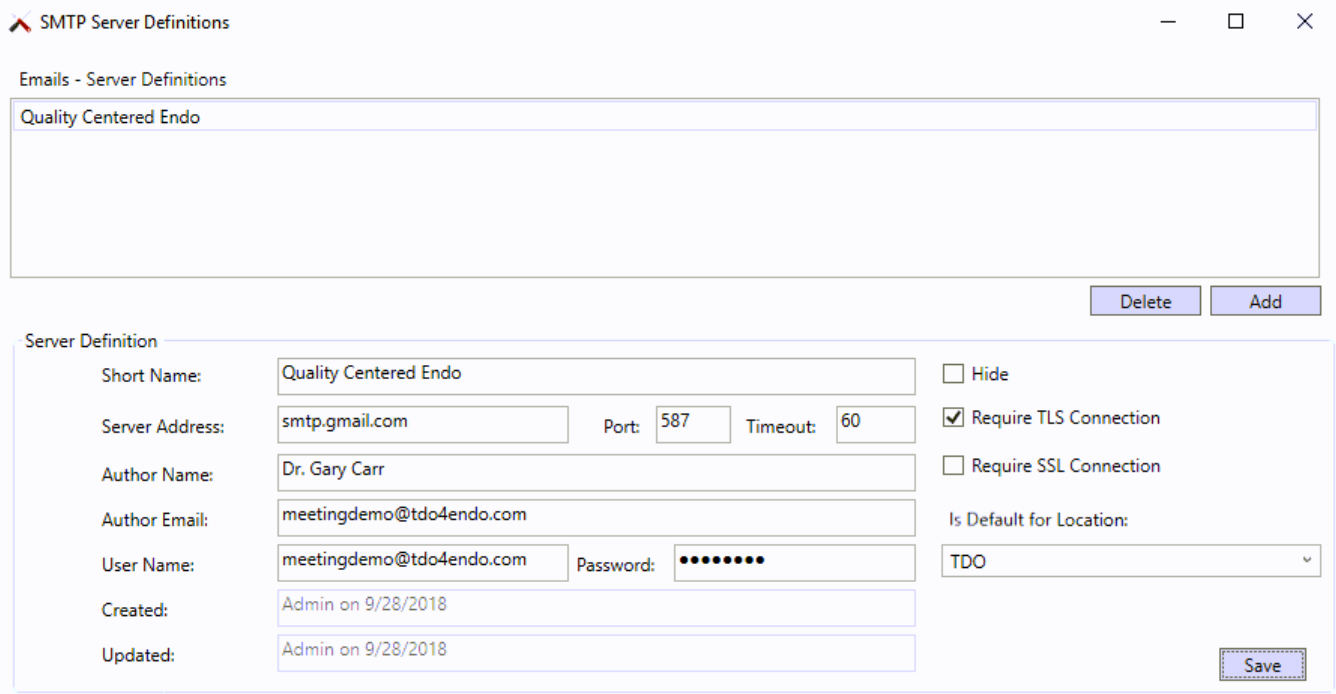
8. Enter the Practice name or Doctor's name on **Author Name** field.

9. Enter the email address on **Author Email** field.

10. Enter the email address on **User Name** field.

11. Enter the password for the email address in the **Password** field.

12. Check the box **"Require TLS Connection"** or **"Require SSL Connection"** depending on the protocol the email provider uses.

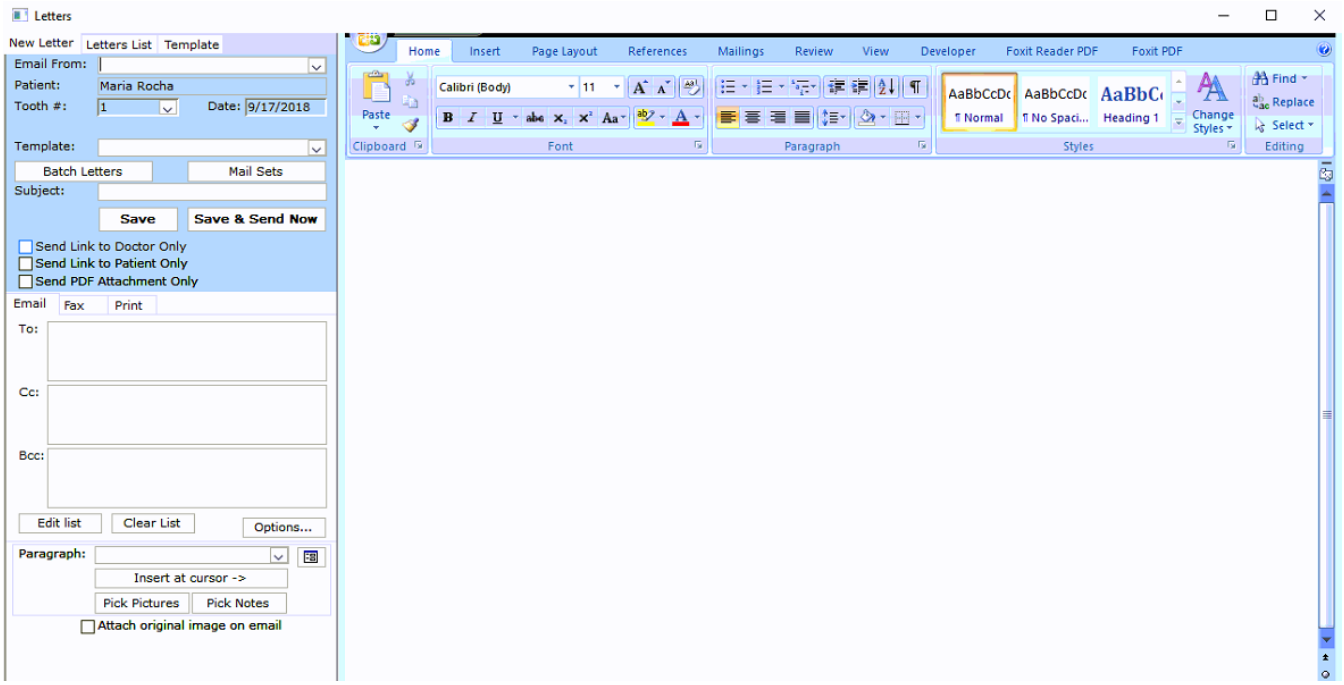


13. For Replicated offices, make sure to select the default location for that Email Server.
14. Click **Save.**

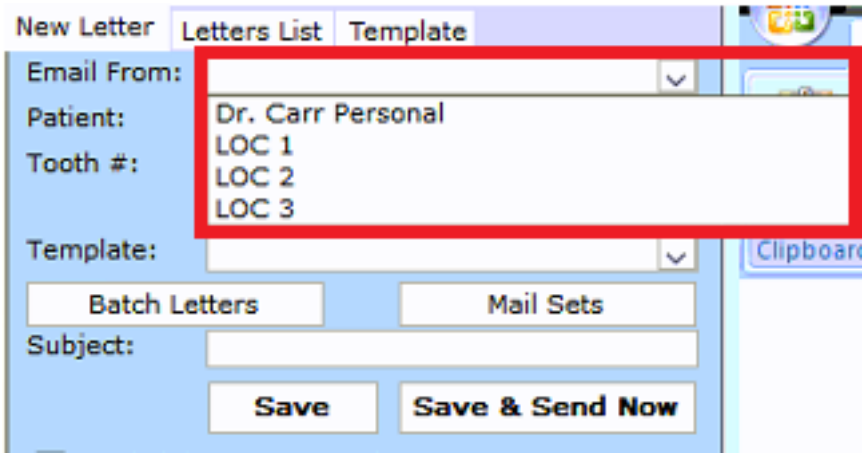
    Note: Users can add as many emails as they wish.

In Letters Module:

1. Open the Letters Module.



2. Click on the **Email From** drop-down list to choose the email settings to be used.



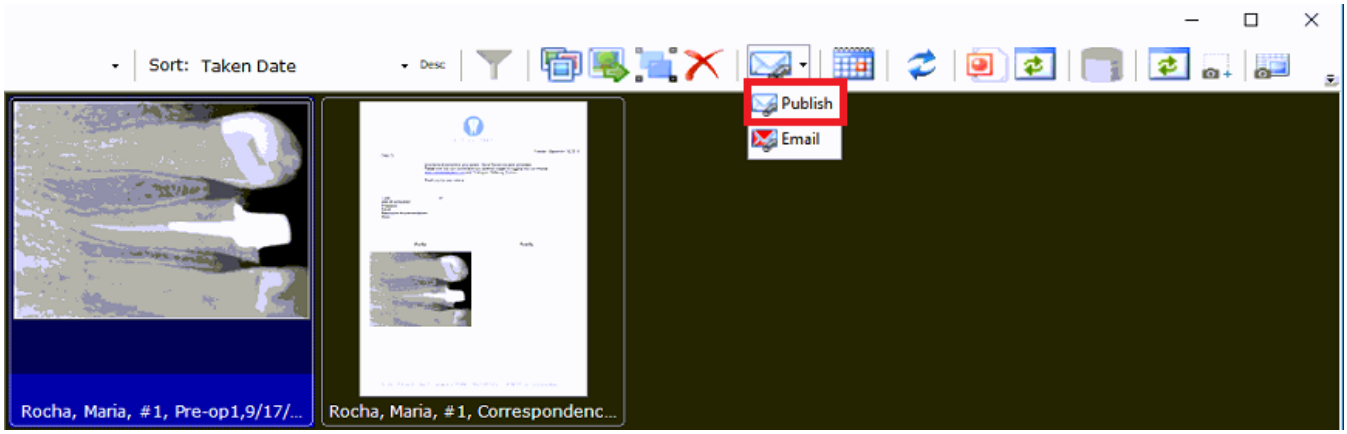
3. Once the letter is emailed out the first time, TDO will remember the email settings used last, so it will be the new default email setting to be used in Letters Module for the user logged on to TDO.

   NOTE: if the default location hasn't been setup then TDO will take the top one in the list.

In New Collage:

1. Open **Organizer**>Select the image (es) to be emailed using the new **Collage** feature.

2. Click on the **Email Selected Images**. Make sure to click in the **'white' envelope** icon or click on the arrow next to the icon and select **Publish.**



3. Once the collage is ready to be emailed, click on the **Email From** drop-down list to choose the email settings to be used.

4. Email the collage.

5. Once the Collage is emailed out the first time, TDO will remember the email settings used last, so it will be the new default email setting to be used in Publisher for the user logged on to TDO. **NOTE: if the default location hasn't been setup then TDO will take the top one in the list.**

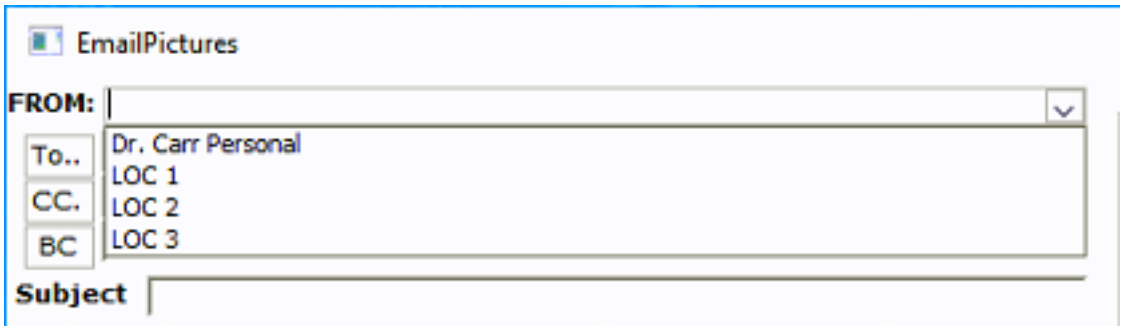
In Old Email:

1. Open **Organizer**>Select the image (es) to be emailed using the **old email** icon shown below.

2. Click on the **Email Selected Images**. Make sure to click in the 'red' envelope icon or click on the arrow next to the icon and select **Email.**



3. Click on the **From** drop-down list to choose the email settings to be used.



4. Once the image (es) is/are ready to be emailed out, click **Send**.

5. Once the email is sent out the first time, TDO will remember the email settings used last, so it will be the new default email setting to be used in Email for the user logged on to TDO.

   NOTE: if the default location hasn't been setup then TDO will take the top one in the list.

Online URL: https://kb.tdo4endo.com/article.php?id=726