

# ***Mail-Plugin User Manual***

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# Overview

This plugin allows the user to manage his emails within Odoo. It provides all the basic functionalities of mail engines so that the user does not have to manage his email outside the odoo, separately. Other than the basic features of the mail engine, it provides many extra functions like prioritizing your emails, categorizing the emails by adding tags and many more.

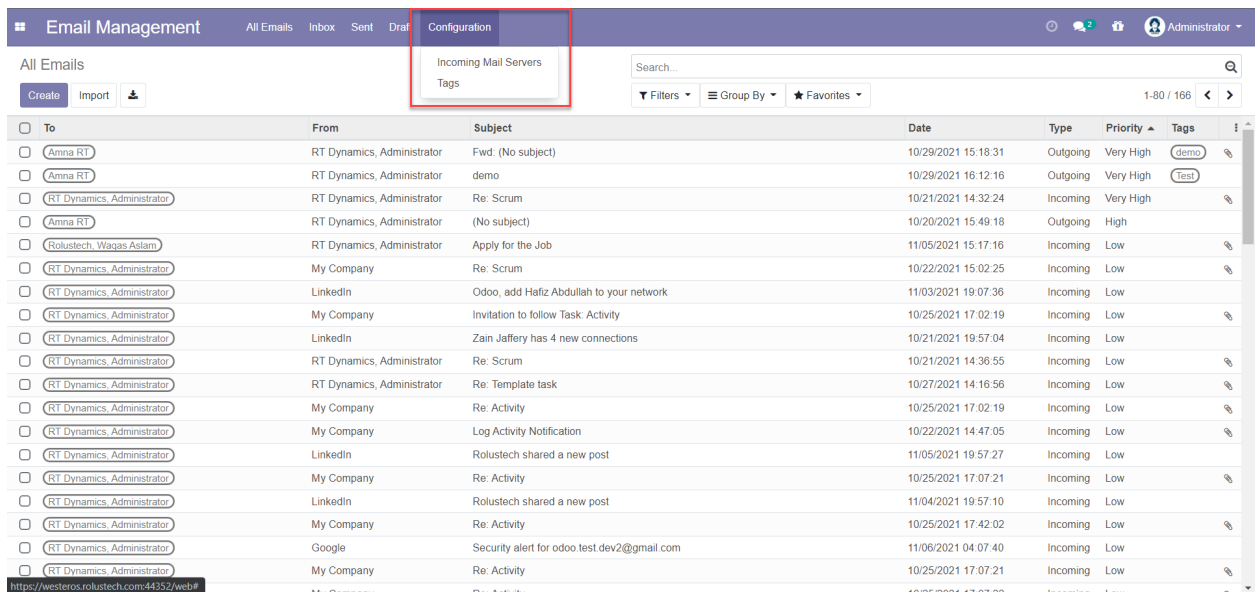
## Prerequisites:

### Configure Incoming Email server

Before using the plugin the user needs to configure the Incoming Email server configurations.

Following are the steps to configure the plugin.

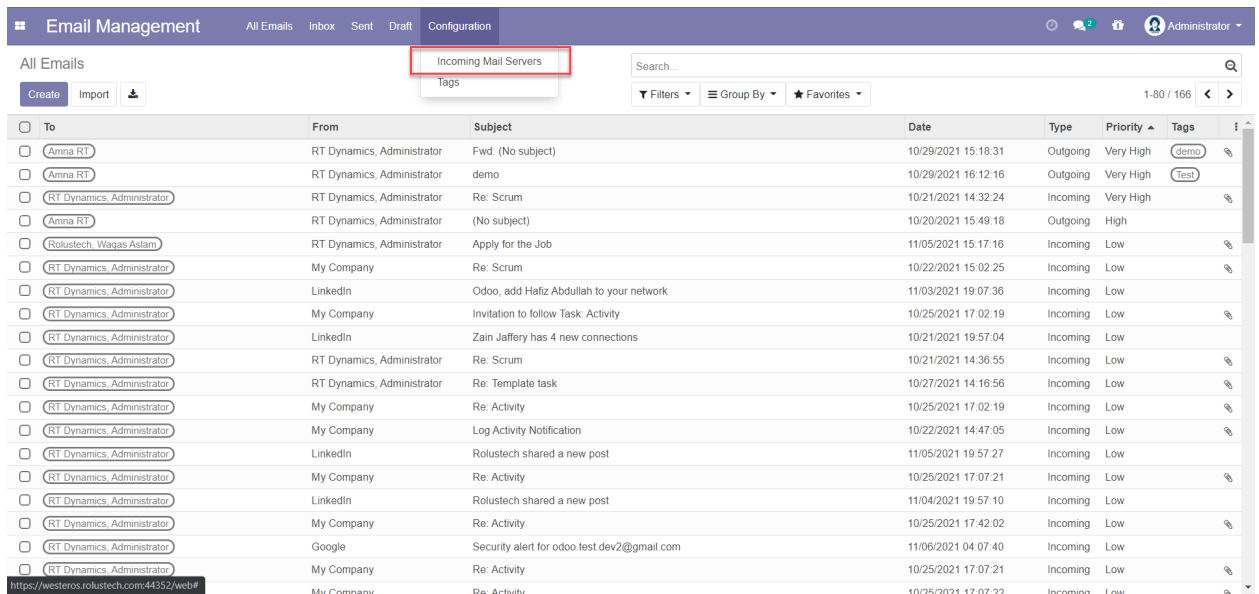
1. Login to the system
2. Go to configuration, upon clicking this a menu will appear.



The screenshot displays the Odoo Email Management interface. At the top, a navigation bar includes 'Email Management', 'All Emails', 'Inbox', 'Sent', 'Draft', and 'Configuration'. The 'Configuration' menu is highlighted with a red box, showing a sub-menu with 'Incoming Mail Servers' and 'Tags'. Below the navigation bar, the 'All Emails' section is visible, featuring a search bar, filters, and a list of emails. The email list has columns for 'To', 'From', 'Subject', 'Date', 'Type', 'Priority', and 'Tags'. The first few emails are from 'Anna RT' and 'RT Dynamics, Administrator'. The last email in the list is from 'My Company' with the subject 'Re: Activity' and a date of '10/26/2021 17:07:22'.

To	From	Subject	Date	Type	Priority	Tags
Anna RT	RT Dynamics, Administrator	Fwd: (No subject)	10/29/2021 15:18:31	Outgoing	Very High	demo
Anna RT	RT Dynamics, Administrator	demo	10/29/2021 16:12:16	Outgoing	Very High	Test
RT Dynamics, Administrator	RT Dynamics, Administrator	Re: Scrum	10/21/2021 14:32:24	Incoming	Very High	
Anna RT	RT Dynamics, Administrator	(No subject)	10/20/2021 15:49:18	Outgoing	High	
Rolustech, Waqas Aslam	RT Dynamics, Administrator	Apply for the Job	11/05/2021 15:17:16	Incoming	Low	
RT Dynamics, Administrator	My Company	Re: Scrum	10/22/2021 15:02:25	Incoming	Low	
RT Dynamics, Administrator	LinkedIn	Odoo, add Hafiz Abdullah to your network	11/03/2021 19:07:36	Incoming	Low	
RT Dynamics, Administrator	My Company	Invitation to follow Task: Activity	10/25/2021 17:02:19	Incoming	Low	
RT Dynamics, Administrator	LinkedIn	Zain Jaffery has 4 new connections	10/21/2021 19:57:04	Incoming	Low	
RT Dynamics, Administrator	RT Dynamics, Administrator	Re: Scrum	10/21/2021 14:36:55	Incoming	Low	
RT Dynamics, Administrator	RT Dynamics, Administrator	Re: Template task	10/27/2021 14:16:56	Incoming	Low	
RT Dynamics, Administrator	My Company	Re: Activity	10/25/2021 17:02:19	Incoming	Low	
RT Dynamics, Administrator	My Company	Log Activity Notification	10/22/2021 14:47:05	Incoming	Low	
RT Dynamics, Administrator	LinkedIn	Rolustech shared a new post	11/05/2021 19:57:27	Incoming	Low	
RT Dynamics, Administrator	My Company	Re: Activity	10/25/2021 17:07:21	Incoming	Low	
RT Dynamics, Administrator	LinkedIn	Rolustech shared a new post	11/04/2021 19:57:10	Incoming	Low	
RT Dynamics, Administrator	My Company	Re: Activity	10/25/2021 17:42:02	Incoming	Low	
RT Dynamics, Administrator	Google	Security alert for odoo test dev2@gmail.com	11/06/2021 04:07:40	Incoming	Low	
RT Dynamics, Administrator	My Company	Re: Activity	10/25/2021 17:07:21	Incoming	Low	
https://westeros.rolustech.com/44352/web#	My Company	Re: Activity	10/26/2021 17:07:22	Incoming	Low	

3. Select incoming mail server from the drop down menu.

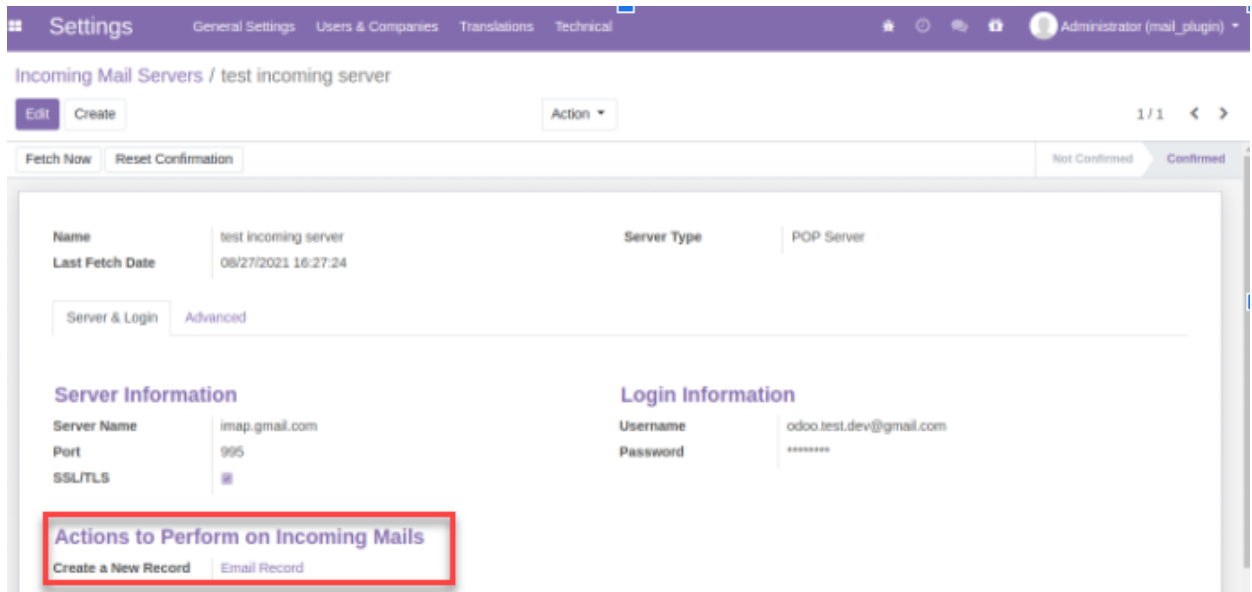


4. Users can create and configure the incoming mail servers. For the reference [visit here](#).

*(There is no need to configure outgoing email server, instead if you configure an outgoing email server then all the outgoing email will be sent only on behalf of the configured email address.)*

## Important Note:

1. User needs to login with the same email ID that was used during the configuration of the mail server.
2. By selecting the “**Email Record**” option from the “**Create a New Record**” field, the incoming email will automatically be logged as a new record in our Email Management module with its respective attributes.

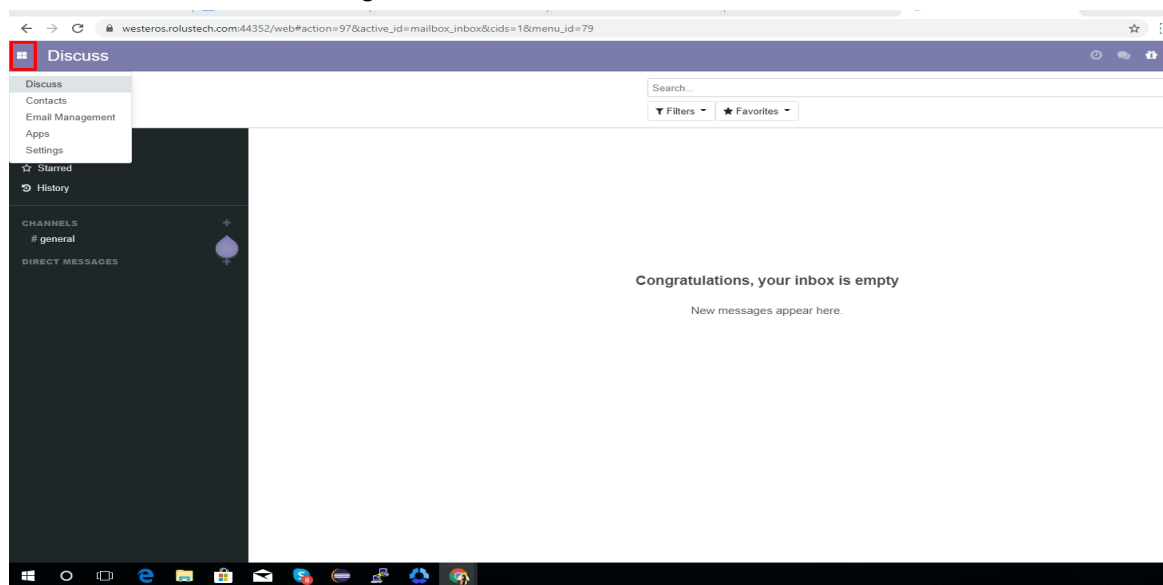


3. The cronjob for fetching an incoming email runs after every minute, but instead of waiting for a minute, we can simply click “Fetch Now” from the action bar.

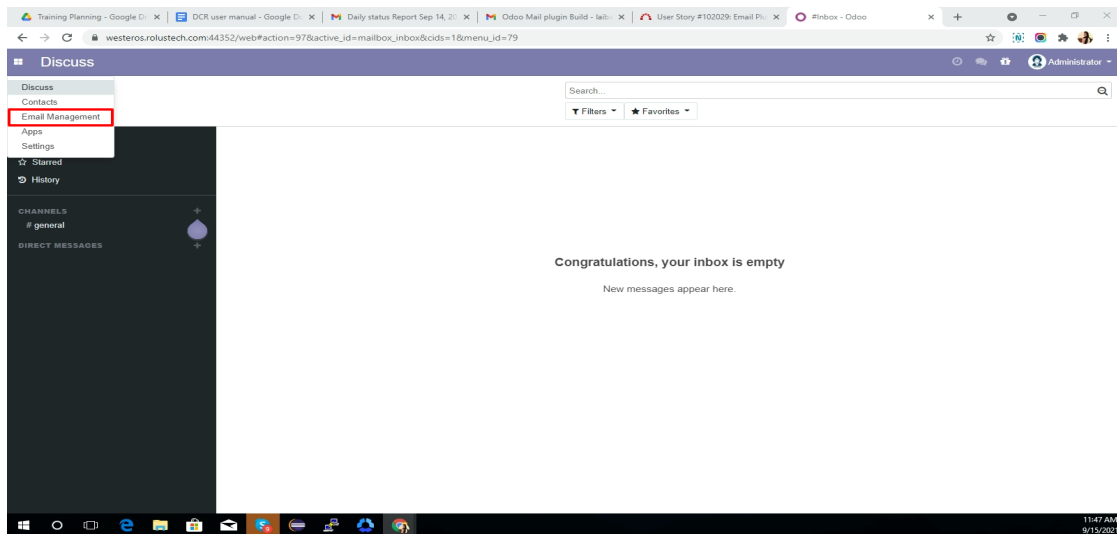
## Navigate to Email Management

Following are the steps to navigate to Email management system

1. Click on the menu in the Navigation Bar at Dashboard.



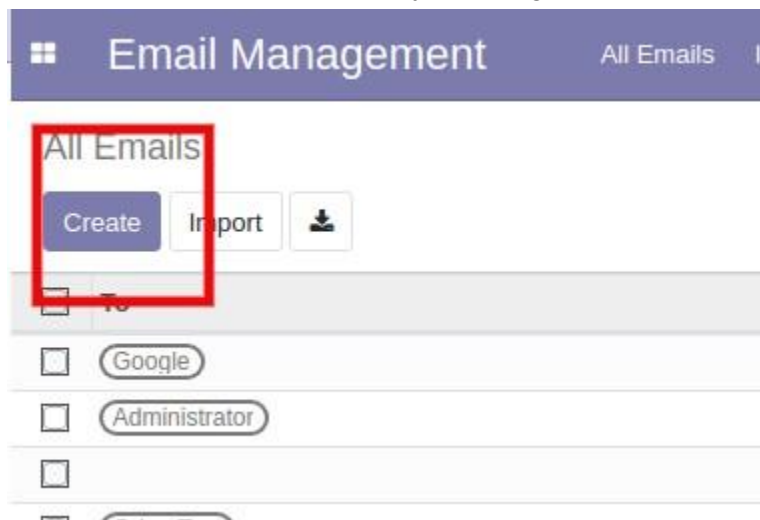
## 2. Click on the Email Management.



## Create An Email Screen

This allows the user to create a new email with in Odoo

- User can send the email by pressing send button
- User can save the email in drafts by pressing the save button
- User can discard this process by pressing discard button



## Compose an Email

- Users should write the “Subject” of email and it will be automatically populated with (No Subject) if the field is empty at sending time.
- “To” is a selection field, where the user can select the contacts whom he wants to send the email to. Users can select multiple contacts at once.
- “Cc” is also a selection field, where the user can select the contacts whom he wants to send the copy of email. Users can select multiple contacts at once.  
**Note:** At least one field “To” or “Cc” is mandatory.
- “From” is a non-editable field which contains the name of the sender.
- “Associated Users” is a pre-populated field with the current user. In case of incoming email checks for all the users in the To, Cc and Sender fields and populates accordingly.
- “Date” is a non-editable field which contains the date of the day on which the user will compose the email and it will update with the sending time and date afterwards.
- “Type” fields show the state of the email i.e. draft/outgoing/incoming and it can not be edited.
- Users can also prioritize emails as Low, Medium, High, Very High.
- “Tags” can be created/accessed from the Menu items: Configuration>Tags. It is for classifying emails on the basis of tags

## Email Body

- HTML field will be contained the email body
- User Signature will automatically be pre populated in the body from the user preferences
- User can format the text with the provided tools.

## Attachments

- Users can upload attachments (any file) by clicking on the attachment button at the bottom and browse files from the system.

The screenshot displays the 'Email Management' application interface. At the top, a purple header bar contains the title 'Email Management' and navigation links: 'All Emails', 'Inbox', 'Sent', 'Draft', and 'Configuration'. On the right side of the header, there are icons for a refresh, a bell, 'RT', and a user profile labeled 'Administrator'. Below the header, the main content area is titled 'All Emails / New'. It features three buttons: 'Save', 'Discard', and 'Send'. The central part of the interface is a form for creating a new email. The form includes a 'Subject' field, a 'To' field with a dropdown menu showing 'My Company' and 'Osdo test', a 'Cc' field, a 'From' field with a dropdown showing 'Administrator', and an 'Associated Users' field with a dropdown showing 'Administrator'. To the right of these fields, there are fields for 'Date' (11/24/2021 15:13:11), 'Type' (Draft), 'Priority' (three stars), and 'Tags'. Below the form fields is a section for the 'Email Body' with a rich text editor toolbar and a text area containing the text 'Administrator'. At the bottom of the form, there is an 'Attachments' section with a button labeled 'Attachments'.

## All Emails

On this screen the user will be able to see all the emails that exist in the module whether the email is sent or received or it is a draft, it will appear in the “All email” tab.

The user will be able to see the following information of the record:

- The recipients of email
- Sender of the email
- Subject of the email
- Date
- Type of email (incoming, outgoing, draft)
- A paper clip symbol (visible only if a record has an attachment)



Email Management					
All Emails					
<div> <div>Create Import</div> <div> <div>Search...</div> <div> <div>Filters</div> <div>Group By</div> <div>Favorites</div> </div> </div> <div>1-74 / 74</div> </div>					
<input type="checkbox"/>	To	From	Subject	Date	Type
<input type="checkbox"/>	(Amna RT)	RT Dynamics, Administrator	Demo email	09/20/2021 17:56:30	Outgoing
<input type="checkbox"/>	(Dev2) (RT Dynamics, Administrator)	RT Dynamics, Administrator	Fwd: Test	09/07/2021 14:10:33	Outgoing
<input type="checkbox"/>	(Odoo dev1)	RT Dynamics, Administrator	testing plugin - type	09/01/2021 10:10:22	Outgoing
<input type="checkbox"/>	(Zarah Sajad)	RT Dynamics, Administrator	outgoing email	09/20/2021 16:49:45	Outgoing
<input type="checkbox"/>	(Dev2) (RT Dynamics, Administrator)	Rolustech, Waqas Aslam	Play	08/30/2021 16:47:25	Incoming
<input type="checkbox"/>	(Dev2)	RT Dynamics, Administrator	From Dev1 to Dev2	08/30/2021 16:34:42	Outgoing
<input type="checkbox"/>		RT Dynamics, Administrator	(No subject)	09/06/2021 16:02:24	Outgoing
<input type="checkbox"/>		RT Dynamics, Administrator	(No subject)	09/06/2021 16:43:54	Outgoing
<input type="checkbox"/>	(RT Dynamics, Administrator)	LinkedIn	Odoo, be recognizable on LinkedIn	09/18/2021 18:57:22	Incoming
<input type="checkbox"/>		RT Dynamics, Administrator	fds	09/06/2021 16:59:24	Outgoing
<input type="checkbox"/>	(RT Dynamics, Administrator)	Laiba Tariq	testing purpose	09/09/2021 11:27:13	Incoming
<input type="checkbox"/>	(Rolustech, Waqas Aslam)	RT Dynamics, Administrator	Re: Play	08/30/2021 18:50:57	Outgoing
<input type="checkbox"/>	(RT Dynamics, Administrator)	Laiba Tariq	test2	09/01/2021 13:00:56	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	Rolustech, Waqas Aslam	Test Bcc	09/01/2021 13:03:13	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator) (Rolustech, Zain Jaffery)	Rolustech, Waqas Aslam	(No subject)	09/01/2021 13:04:25	Incoming
<input type="checkbox"/>		RT Dynamics, Administrator	(No subject)	09/06/2021 17:00:58	Outgoing
<input type="checkbox"/>	(RT Dynamics, Administrator)	LinkedIn	LinkedIn News Asia recently posted	09/17/2021 19:12:31	Incoming
<input type="checkbox"/>	(Rolustech, Waqas Aslam)	RT Dynamics, Administrator	Fwd: New	09/07/2021 14:53:40	Outgoing
<input type="checkbox"/>	(RT Dynamics, Administrator)	Google	Security alert	09/13/2021 17:07:02	Incoming

## Inbox

By clicking on the inbox option, the user will be able to see all the received emails in the list view.

Email Management					
<div> <div>Received Emails</div> <div> <div>Search...</div> <div> <div>Filters</div> <div>Group By</div> <div>Favorites</div> </div> </div> <div>1-44 / 44</div> </div>					
<input type="checkbox"/>	To	From	Subject	Date	Type
<input type="checkbox"/>	(Dev2) (RT Dynamics, Administrator)	Rolustech, Waqas Aslam	Play	08/30/2021 16:47:25	Incoming
<input type="checkbox"/>	(Dev2) (RT Dynamics, Administrator) (odoo test dev2)	Rolustech, Waqas Aslam	67	09/16/2021 18:57:14	Incoming
<input type="checkbox"/>	(Dev2) (RT Dynamics, Administrator)	Rolustech, Waqas Aslam	New	09/07/2021 14:52:25	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	LinkedIn	Rolustech recently posted	09/20/2021 19:17:12	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	LinkedIn	Odoo, be recognizable on LinkedIn	09/18/2021 18:57:22	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	Laiba Tariq	testing purpose	09/09/2021 11:27:13	Incoming
<input type="checkbox"/>	(Dev2) (RT Dynamics, Administrator) (odoo test dev2)	Rolustech, Waqas Aslam	Test All three	09/21/2021 16:37:37	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	LinkedIn	LinkedIn News Asia shared a new post	09/24/2021 19:16:58	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	Laiba Tariq	test2	09/01/2021 13:00:56	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	Rolustech, Waqas Aslam	Test Bcc	09/01/2021 13:03:13	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator) (Rolustech, Zain Jaffery)	Rolustech, Waqas Aslam	(No subject)	09/01/2021 13:04:25	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	LinkedIn	LinkedIn News Asia recently posted	09/17/2021 19:12:31	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	Google	Security alert	09/13/2021 17:07:02	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	Google	Critical security alert for odoo test dev2@gmail.com	09/13/2021 13:01:55	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	LinkedIn	Odoo, welcome to LinkedIn	09/13/2021 17:22:20	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	LinkedIn	You appeared in 1 search this week	09/18/2021 08:17:18	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	RT Dynamics, Administrator	dasasd	09/13/2021 13:01:55	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	Zain Jaffery via LinkedIn	Meet your new connection	09/13/2021 18:31:53	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	LinkedIn	You appeared in 7 searches this week	09/25/2021 08:17:26	Incoming
<input type="checkbox"/>	(RT Dynamics, Administrator)	LinkedIn	Never miss a chance to connect, get the app	09/15/2021 16:47:16	Incoming

## Sent

By clicking on the sent option on the top, the user will be able to see all the Sent emails in the list view.

Email Management

All Emails

Inbox

Sent

Draft

Configuration

Sent Emails

Create

Import

Search

Filters

Group By

Favorites

1-33 / 33

<input type="checkbox"/>	To	From	Subject	Date	Type	
<input type="checkbox"/>	Amna RT	RT Dynamics, Administrator	Demo email	09/20/2021 17:56:30	Outgoing	
<input type="checkbox"/>	Odoo dev1	RT Dynamics, Administrator	testing plugin - type	09/01/2021 10:10:22	Outgoing	
<input type="checkbox"/>	Dev2 RT Dynamics, Administrator	RT Dynamics, Administrator	Fwd: Test	09/07/2021 14:10:33	Outgoing	
<input type="checkbox"/>	Zarah Sajjad	RT Dynamics, Administrator	outgoing email	09/20/2021 16:49:45	Outgoing	
<input type="checkbox"/>		RT Dynamics, Administrator	(No subject)	09/06/2021 16:02:24	Outgoing	
<input type="checkbox"/>	Dev2	RT Dynamics, Administrator	From Dev1 to Dev2	08/30/2021 16:34:42	Outgoing	
<input type="checkbox"/>		RT Dynamics, Administrator	(No subject)	09/06/2021 17:00:58	Outgoing	
<input type="checkbox"/>	Rolustech, Waqas Aslam	RT Dynamics, Administrator	Fwd: New	09/07/2021 14:53:40	Outgoing	
<input type="checkbox"/>	Rolustech, Waqas Aslam	RT Dynamics, Administrator	Test	09/07/2021 14:07:44	Outgoing	
<input type="checkbox"/>	Laiba Tariq	RT Dynamics, Administrator	Fwd: Play	09/01/2021 11:04:12	Outgoing	
<input type="checkbox"/>	Laiba Tariq	RT Dynamics, Administrator	Re: bcc	09/01/2021 16:03:08	Outgoing	
<input type="checkbox"/>	Odoo dev1	RT Dynamics, Administrator	Fwd: bcc	09/01/2021 16:32:17	Outgoing	
<input type="checkbox"/>		RT Dynamics, Administrator	Re: Test	09/07/2021 14:08:39	Outgoing	
<input type="checkbox"/>	Rolustech, Waqas Aslam	RT Dynamics, Administrator	Re: New	09/07/2021 14:53:11	Outgoing	
<input type="checkbox"/>		RT Dynamics, Administrator	(No subject)	09/06/2021 16:35:30	Outgoing	
<input type="checkbox"/>		RT Dynamics, Administrator	My Company Quotation (Ref S00001)	09/06/2021 17:16:10	Outgoing	
<input type="checkbox"/>	Odoo dev1	RT Dynamics, Administrator	Re: testing plugin - type	09/01/2021 10:23:10	Outgoing	
<input type="checkbox"/>	Laiba Tariq	RT Dynamics, Administrator	Fwd: bcc	09/01/2021 15:54:04	Outgoing	
<input type="checkbox"/>	Laiba Tariq	RT Dynamics, Administrator	Re: bcc	09/01/2021 16:24:45	Outgoing	
<input type="checkbox"/>		RT Dynamics, Administrator	(No subject)	09/06/2021 16:03:41	Outgoing	

## Drafts

By clicking on the draft option from the top, the user will be able to see all the emails that are saved as draft and have not been sent.

Email Management

All EmailsInboxSentDraftConfiguration

Draft Emails

CreateImport

Search...

FiltersGroup ByFavorites

1-1 / 1

	To	From	Subject	Date	Type
<input type="checkbox"/>	<div>Odoo dev1</div> <div>RT Dynamics, Administrator</div>	RT Dynamics, Administrator	testing plugin - date and time	09/01/2021 10:06:46	Draft

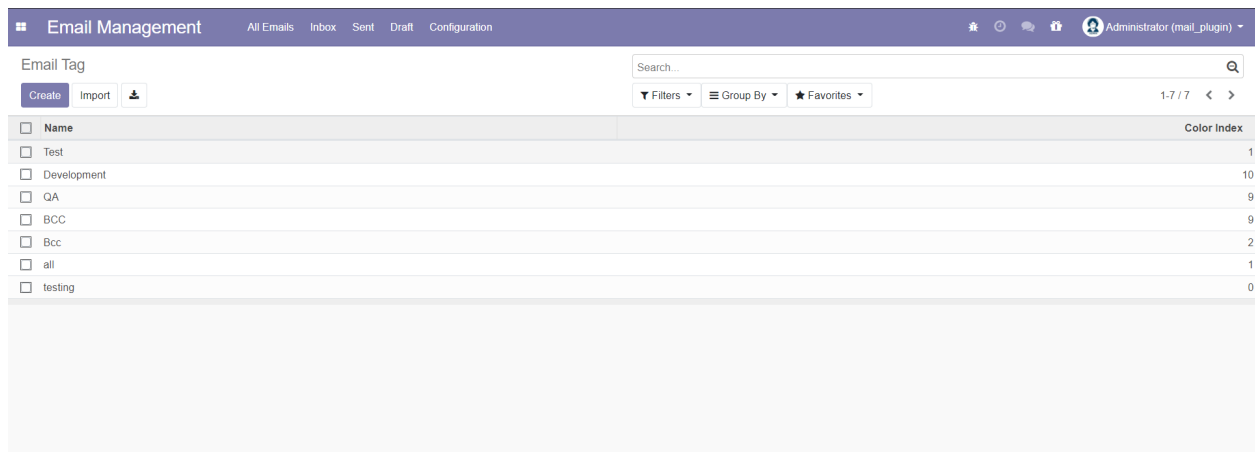
## Configuration

Upon clicking on this, a menu will open. Users will select “tags” to navigate to the Tags tab.

## Tags

This allows the user to performs following operations

- Create Tags
- Import tags from file
- Export tags in .xlsx format
- Edit tags



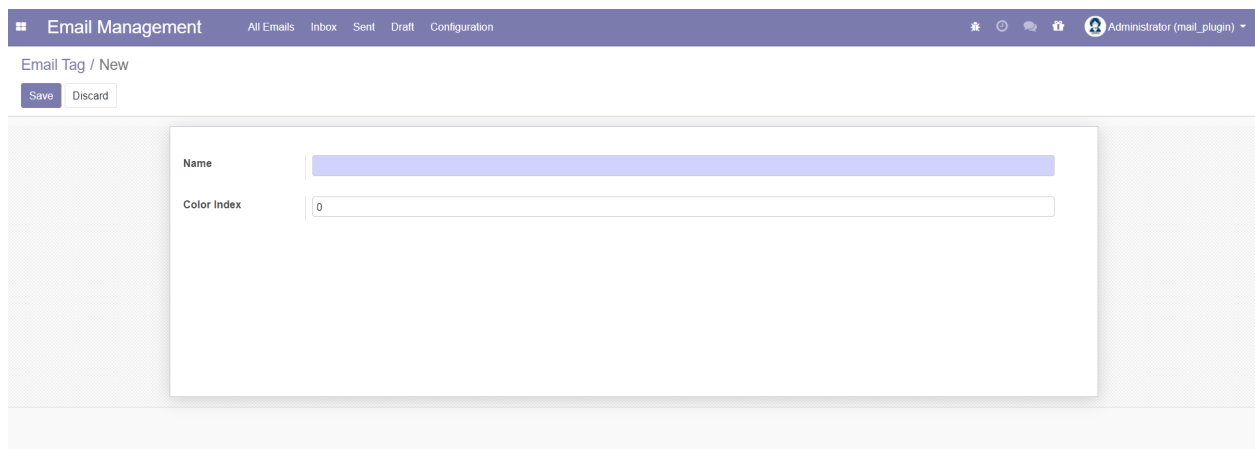
The screenshot shows the 'Email Management' interface with a sidebar containing 'All Emails', 'Inbox', 'Sent', 'Draft', and 'Configuration'. The main area is titled 'Email Tag' and includes a search bar, 'Create' and 'Import' buttons, and a table of existing tags. The table has columns for 'Name' and 'Color Index'. The tags listed are: Test (1), Development (10), QA (9), BCC (9), Bcc (2), all (1), and testing (0). Below the table is a large empty space for creating or editing tags.

Name	Color Index
<input type="checkbox"/> Test	1
<input type="checkbox"/> Development	10
<input type="checkbox"/> QA	9
<input type="checkbox"/> BCC	9
<input type="checkbox"/> Bcc	2
<input type="checkbox"/> all	1
<input type="checkbox"/> testing	0

## Create Tags

This screen allows you to create a new tag. It has following fields

- Name
- Color index

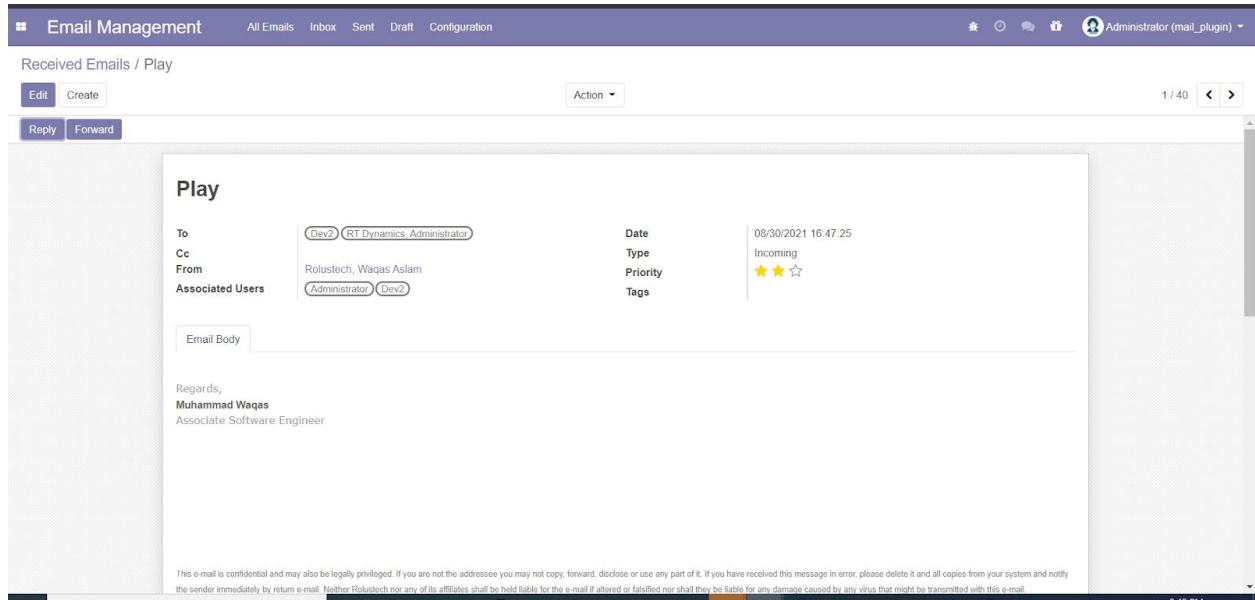


The screenshot shows the 'Email Tag / New' form. It has a 'Save' button and a 'Discard' button. The form contains two input fields: 'Name' and 'Color Index'. The 'Name' field is currently empty and highlighted with a blue border. The 'Color Index' field contains the value '0'.

Name	<input type="text"/>
Color Index	<input type="text" value="0"/>

## Edit Email

Upon clicking on any of the records, the user will be navigated to the form view of an email.



## Incoming and Outgoing mails:

User can edit following things by clicking on the Edit button

- tags
- priority of the email

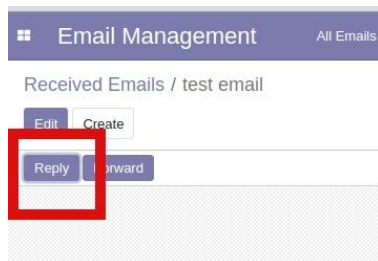
**Note:** Users will be able to track the action history on these fields.

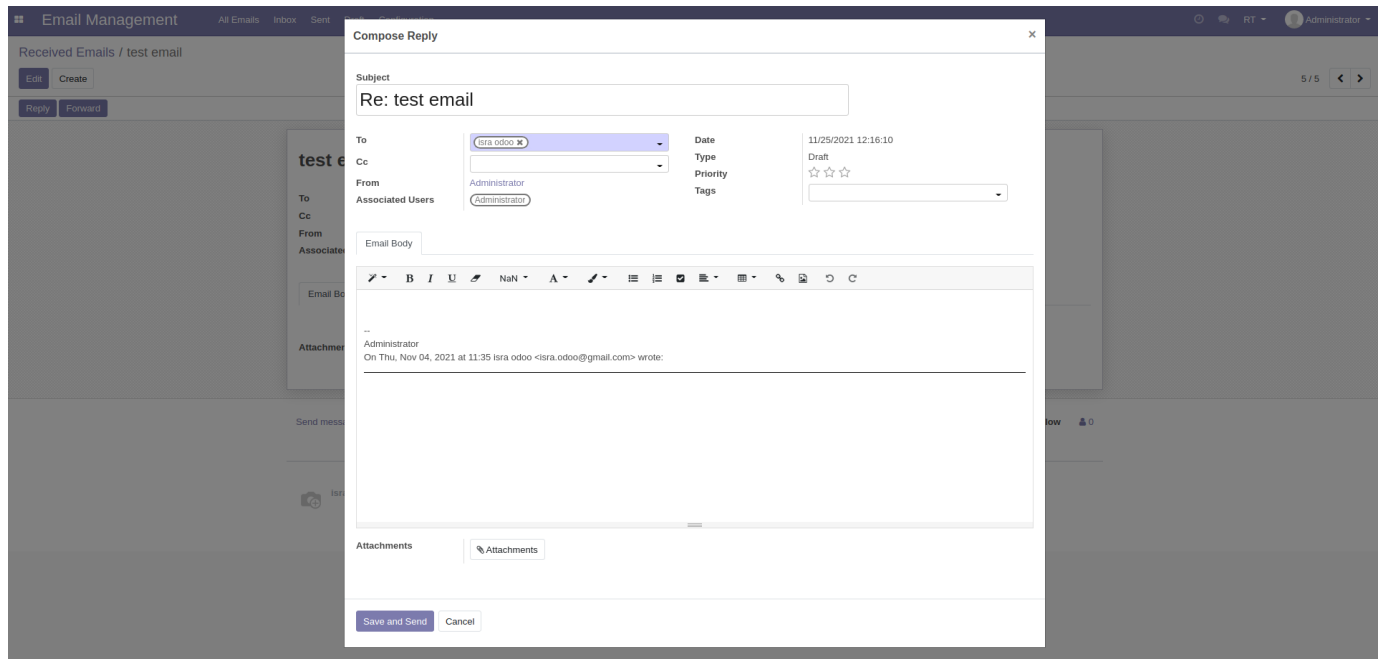
## Draft mails:

Users can edit the whole content of the draft email by clicking on the Edit button.

## Reply

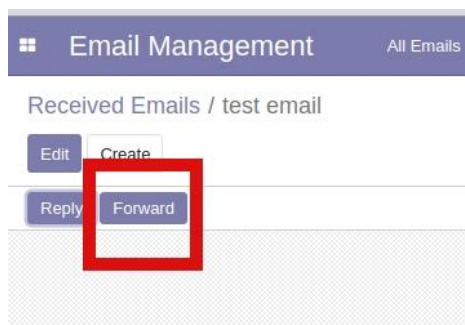
Users can reply to an email by clicking on the Reply button. A new pop-up screen will appear and then the user can reply the email.

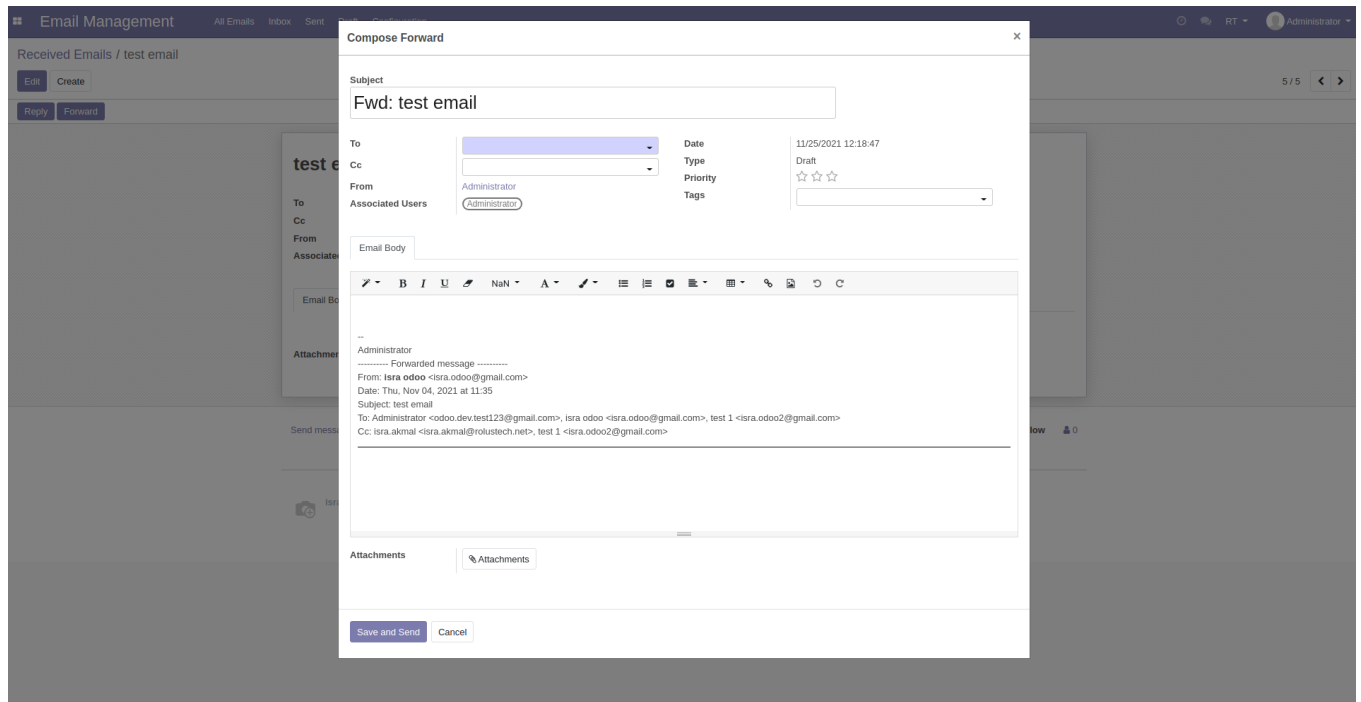




## Forward

Users can forward a specific email by clicking on the forward button. A new pop-up screen will appear and then the user can select the contact which he wants to forward that email to.





## Import email

Users can also import emails by clicking on “Import” button

## Export email

User can export all the email records in the form of xlsx file by clicking on “Export” button

## Search

- **Filter**

Users can apply custom filters on the records which helps the user to search the required record easily. User can filter record on the basis of:

- To
- Cc
- Sender
- Tags
- Priority
- Email body
- Keyword

- **Group By**

Users can also group the emails to filter the records.

- **Favorite**

This allows you to save the current searches as your favourites

## **Actions**

User can select the email by clicking on the checkbox. This will make the “Action” button visible. After the selection, the user will be able to perform following actions by clicking on the action dropdown

- Export
- Delete

User will be able to perform following operations using “Action” button in the form view of the record

- Delete
- Duplicate